



SSA - Discovery Management

June 11, 2015

DODD

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Overview

Discovery – “the action or process of learning something for the first time.”

www.merriam-webster.com/dictionary/discovery

Discovery within ***imaginelS*** is referred to as Discovery Results. It allows the SSA to collaborate with the individual and their team as well as document goals and objectives that are meaningful to the individual.

imaginelS has 9 predefined Discovery Result groups called Discovery Modules that allow the SSA to input the information that is obtained during discovery (assessment).

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- **Discovery Modules**
 - Communications & Learning
 - Day to Day Life
 - Employment
 - Getting Around
 - Home & Housing
 - Relationships
 - Health & Wellness
 - Community Memberships
 - Finance

Overview – Discovery Module Sub-Menus

- **Communication & Learning**
 - Communication - Expressing Yourself
 - Communication - Understanding Others
 - Communication - Making Decisions
 - Learning - Learning Styles
- **Day to Day Life**
 - Results - Personal care
 - Results - Moving Around At Home
 - Results - Meals & Food
 - Results - Shopping
 - Results - Taking Care of Personal Items
 - Results - Taking Care of Home
 - Results - Personal Safety

Overview – Discovery Module Sub-Menus

- **Employment**
 - Results - Work History
 - Results - Jon Interests
- **Getting Around**
 - Moving Around - At Home
 - Moving Around - In Neighborhood
 - Moving Around - During Transfers
 - Moving Around - Equipment
 - Moving Around - Transportation
 - Safety - Neighborhood Safety
 - Safety - Vehicle Safety
 - Arrangements - Appointments
 - Arrangements - Shopping
 - Arrangements - Out-to-Eat / Fun Places

Overview – Discovery Module Sub-Menus

- **Home & Housing** (What Makes Sense, What Doesn't Make Sense, Supports Requested)
 - Current Living Arrangement
 - Living Situation Considerations
 - Accessibility Considerations
 - Finance Considerations
 - Roommate Considerations
- **Relationships**
 - Results - Family
 - Results - Friends
 - Results - Neighbors
 - Results - Casual Acquaintances
 - Results - Interests & Preferences

Overview – Discovery Module Sub-Menus

- **Health & Wellness**
 - Food & Nutrition - Special Diet / Food Preparation
 - Food & Nutrition - Eating / Chewing Considerations
 - Food & Nutrition - Other Food & Nutrition
 - Physical Activity - Level of Activity
 - Physical Activity - Other Physical Activity
 - Healthcare - Appointments (Making, Frequency, Getting There)
 - Healthcare - Doctor Instructions / Follow Up Care
 - Healthcare - Illness Care
 - Healthcare - Other Healthcare
 - Dental Care - Cleaning
 - Dental Care - Other Dental Care
 - Wellness - Screening / Maintenance
 - Wellness - Other Wellness
 - Medications - RX
 - Medications - OTC (Over the Counter)

Overview – Discovery Module Sub-Menus

- **Community Membership**
 - Results - Going Places And Doing Things
 - Results - Making Plans To Do Things
 - Results - Getting There
 - Results - Building On Interests
 - Results - People I Do Things With
 - Results - Personal Money (Outings, Trips, etc.)
 - Results - Interests & Preferences
- **Finance**
 - Money Management - Personal Money
 - Money Management - Banking
 - Money Management - Budgeting / Bill Payment
 - Benefit Management

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Discovery Management – ***imaginelS*** uses this as a grouping method for the Discovery Modules.

Discovery Management allows the modules to be referenced and phased in a central location within ***imaginelS***.

You can also print the discovery results from Discovery Management.

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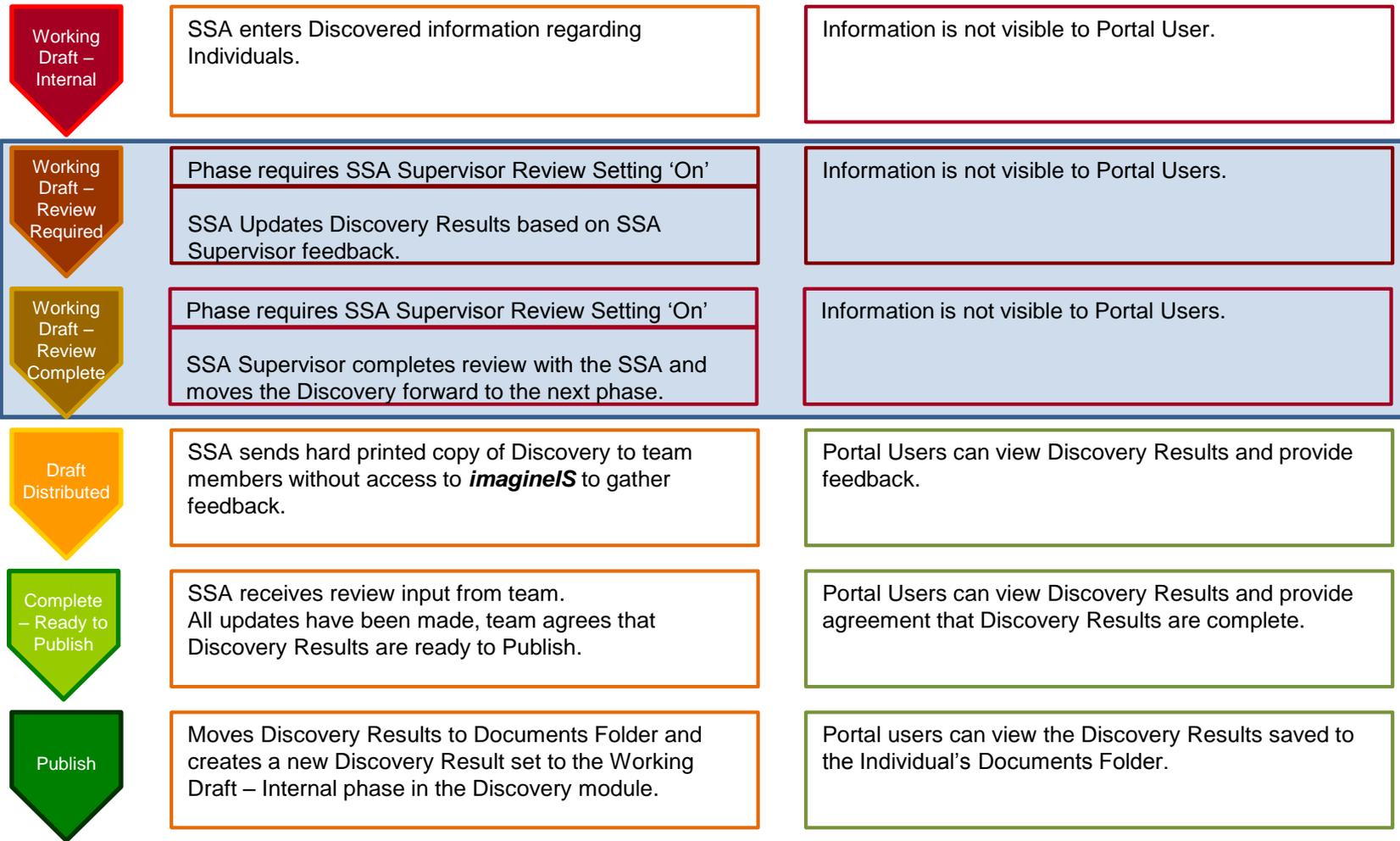
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Discovery Management Phases



Discovery – Non Supervisor Review

Working
Draft –
Internal

SSA enters discovered information regarding Individuals.

Information is not visible to Portal User.

Draft
Distributed

SSA sends printed copy of Discovery to team members without access to *imagineIS* to gather feedback.

Portal Users can view Discovery Results and provide feedback.

Complete
– Ready to
Publish

SSA receives review input from team. All updates have been made, team agrees that Discovery Results are ready to Publish.

Portal Users can view Discovery Results and provide agreement that Discovery Results are complete.

Publish

Moves Discovery Results to Documents Folder and creates a new Discovery Result set to the Working Draft – Internal phase in the Discovery module.

Portal users can view the Discovery Results saved to the Individual's Documents Folder.

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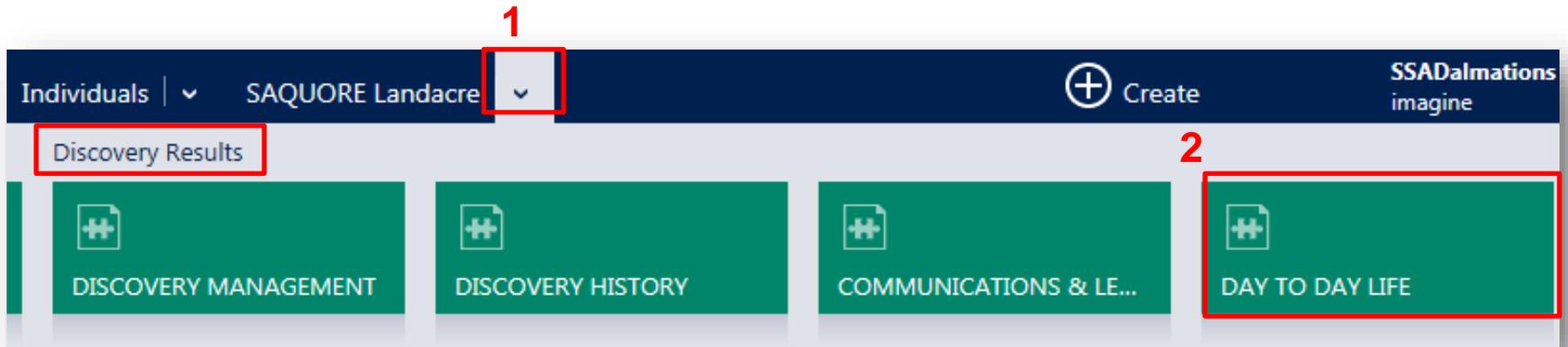
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Selecting Discovery Module



Each Discovery Results has an associating Discovery Module . Each Discovery Module has a structured set of menus that allow you to add the Discovery information based on your assessments. In this section we will use the **Day To Day Life** module.

Day to Day Life



INDIVIDUAL : INFORMATION

SAQUORE Landacre



Date of Birth*
🔒

SSN
🔒 XXX-XX-386

Assigned SSA
🔒 SSADalmatir

Day to Day Life Associated View ▾

🔒 CHART PANE ▾ RUN REPORT ▾ EXPORT DAY TO DAY LIFE

Individual ↑	Name	Last Edited Date	Phase	🔒
SAQUORE Landacre	Day to Day Life	4/8/2015	Working Draft - In...	🔄

Working Draft Internal

Day to Day Life Associated View ▾

 ▾  COPY A LINK  EMAIL A LINK  CHART PANE ▾  RUN WORKFLOW ...

✓ Individual ↑	Name	Last Edited Date	Phase
✓ Arnez STEARN	Day to Day Life	4/8/2015	Working Draft - In...

The Discovery Modules are closely tied to a section called Discovery Management. In order to phase each of the Discovery Modules through the *imaginELS* application you need to phase the Discovery Management section. Discovery Management is covered with in slides 11 – 22. The data that you enter into the Discovery Modules continues to build . A copy of the data gets saved when you publish the Discovery Management section of *imaginELS*.

Opening a Module

Day to Day Life

General

Last Edited Date	🔒 6/24/2015		
Phase	🔒 Working Draft - Internal	Existing Supports	Natural Supports Engaged
Explored Module?	No	SSA Planning Worksheet	🔒 <u>SSA Planning Worksheet</u>

When you open a Discovery Module for the first time and no work has been done in that Module, the Explored Module field defaults to “No”. The fact that **No** is selected effects what is displayed on this screen. You will need to change this to **Yes** by selecting this field and changing the value.

Setting up the Day to Day module

General

Last Edited Date	6/16/2015	Existing Supports	--
Phase	Working Draft - Internal	SSA Planning Worksheet	SSA Planning Worksheet
Explored Module?	Yes		
Supports Needed?	Yes		

Results

Summary

Feedback

If you do not change the Explored Module to "Yes" when you move the Discovery Management through the phases the system will by pass this module

When you change the value in the Explored Module and Supports Needed fields the screen will update and reveal some hidden groups. The sub-menus displayed are all specific to the Discovery Module being completed. At this point you have the option to save your work. Do Not Close!

New Module Sub-Category

PERSONAL CARE : INFORMATION

New Personal Care

Individual
Arnez STEAF

Personal Care

Abilities	Individual can walk 15 steps
Existing Supports	The Individuals parents has helped them to be able to walk up to 15 steps.
Supports Requested	The Individual has shared that they would like to walk around their entire block. But their parents are not able to help them walk this far so they would like other assistance
Sort Order (1 - 9) *	3

This slide displays an example of the “**Personal Care**” section of the “**Day To Day Life**”, “**Results**” sub-group. You will need to complete the remaining Discovery Modules that relate to the Individual.

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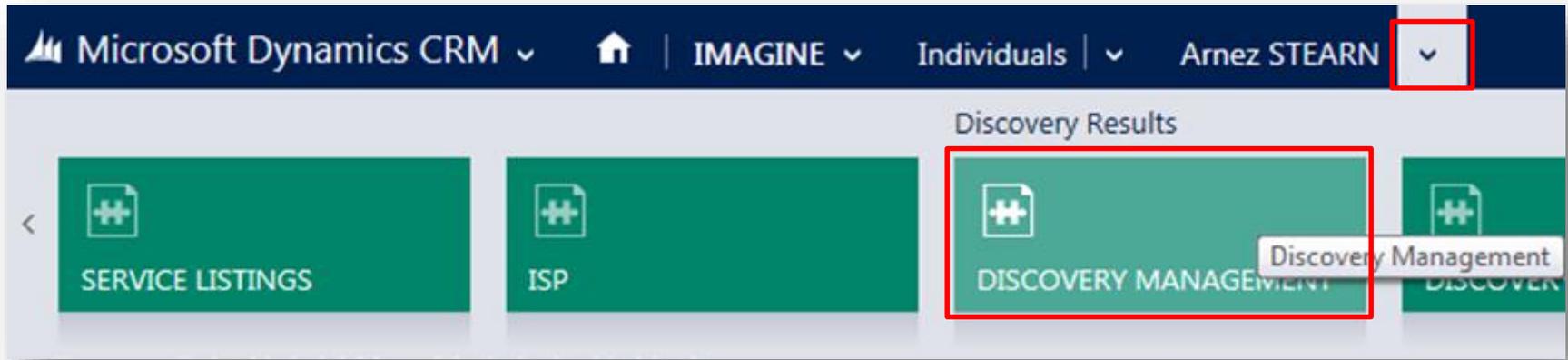
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Discovery Management



After you have completed the work in the Discovery Results you will need to go into the Discovery Management portion of the *imagineIS*. This is where you create the structure that combines the Discovery Modules and will allow you to phase them (using Discovery Management) through the review, edit and acceptance process.

Discovery Management Associate

Discovery Management Associate...

ADD EXISTING DISCOVER... COPY A LINK EMAIL A LINK CHART PANE ...

Individual ↑	Name	Phase	Communication...	Community Me...	Day to Day Life...	Employment As...	Finance As Of	Getting Around...	Health an
✓	<u>Arnez STEARN</u>	Discovery Results Management	Working Draft...	6/15/2015	4/8/2015	4/8/2015	4/8/2015	4/8/2015	4/8/2015

The default dashboard that will open for “**Discovery Management Associated View**” will always show one name “**Discovery Results Management**”. The default phase for this will always be Working Draft-Internal. This view includes the different Discovery Modules and the dates they were last edited.

To open this you can select the Discovery Results Management that is listed on this dashboard. If you had a previous Discovery Results Management that you were working on and would like to perform an update; you can select “**ADD EXISTING DISCOVERY**”.

Add Existing Discovery Management

Discovery Management Associate...

...

Individual	Name	Phase	Communication...	Community Me...	Day to Day Life...	Employment As...	Finance As Of	Getting Around...	Health an...

If you selected the “**ADD EXISTING DISCOVERY MANAGEMENT**” option the screen will update. You will see that the previous values are all empty. To search for the Discovery Results Management that you wish to update, select the magnifying glass. This will open a search window.

New Discovery Management

Discovery Management Associate... ▾

🔍 ADD EXISTING DISCOVER... 📊 CHART PANE ▾ 📄 RUN REPORT ▾ 📄 EXPORT DISCOVERY MAN...

✓ Individual ↑	Name	Phase	Communication...	Community Me...	Day to Day Life...	Employment As...	Finance As Of	Getting Around...	Health a
✓ Arnez STEARN	<u>Discovery Results Management</u>	Working Draft...	6/15/2015	4/8/2015	6/16/2015	4/8/2015	4/8/2015	4/8/2015	4/8/2015

If you are creating a new Discovery Results Management, select “**Discovery Results Management**”. You will always have the option to select the “**Discovery Results Management**” that is displayed in this view and edit the contents. This option is available until the “**Discovery Results Management**” has been phased through the published phase.

New Discovery

Discovery Results Status

Draft Distributed Date



Phase

 Working Draft - Internal

When you select the Discovery Results Management a new Dashboard will open “**Discovery Results Status**”. This view displays the different Discovery Modules and the dates that they were last edited. Each of the Discovery Modules can be edited and saved independent of one another. It also includes the phase of the Discovery Results Management. “**The Draft Distributed Date**” reflects the date that the Discovery Results Management that you selected reached the Draft Distributed phase. The Phasing Discovery Management section of this presentation will explain phasing in more detail. However, it is important to know that the Draft Distributed phase is seen by portal users and they can provide feed back.

Communication & Learning	Last Edited Date		--
Community Membership	Last Edited Date		--
Day to Day Life	Last Edited Date		--
Employment	Last Edited Date		--
Finance	Last Edited Date		--
Getting Around	Last Edited Date		--
Health & Wellness	Last Edited Date		--
Home & Housing	Last Edited Date		--
Relationships	Last Edited Date		--

Status

Active

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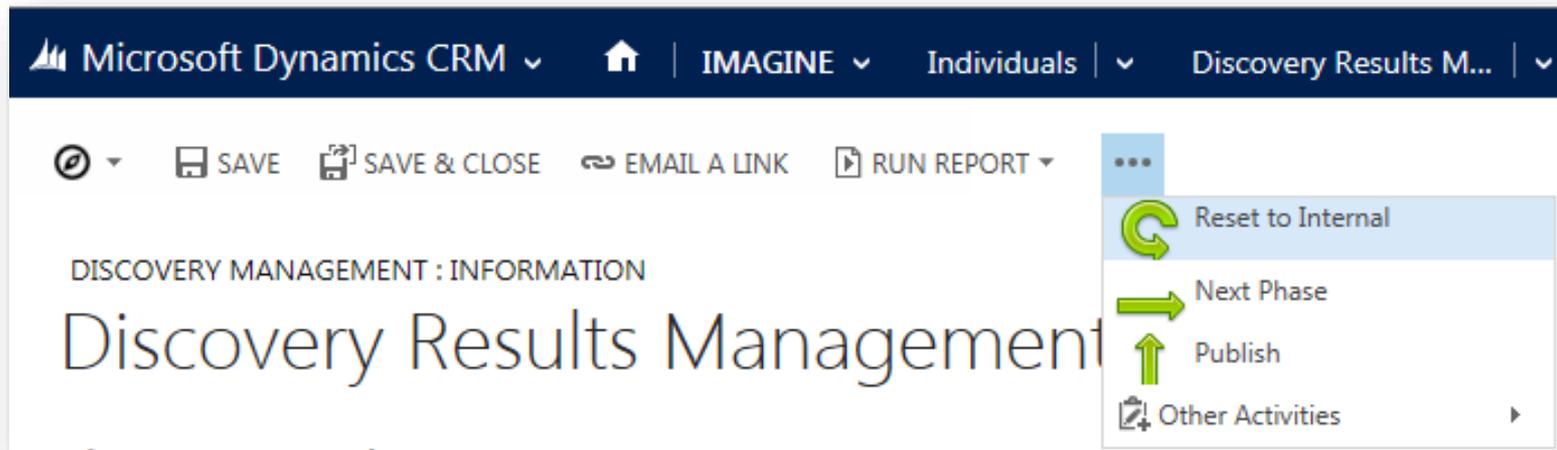
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Selecting the Different Phases



Phases:

- Working Draft Internal
- Working Draft- Review Required (Supervisor Review = Yes)
- Working Draft-Review Completed (Supervisor Review = Yes)
- Draft Distributed Complete - Ready to Publish
- Publish

Next Draft Phase Alert

DISCOVERY MANAGEMENT : INFORMATION

Discovery Results Management

Discovery Results Status

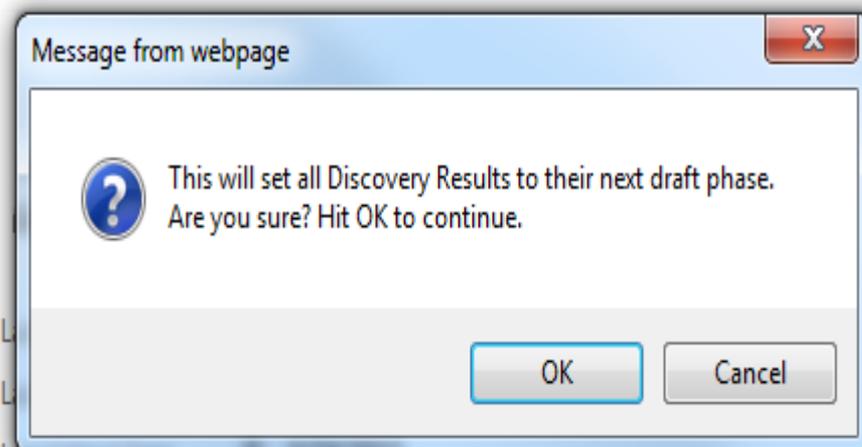
Draft Distributed Date

6/16/2015

[Communication & Learning](#)

[Community Membership](#)

[Day to Day Life](#)



When you select the Next Phase you will receive a Pop-up that is warning you of a change that is about to occur to your Discovery Results.

Select **OK** to move to the next phase or **Cancel** to return to the Discovery Results Management.

Processing Time Notification

DISCOVERY MANAGEMENT : INFORMATION

Discovery Results Management

Discovery Results Status

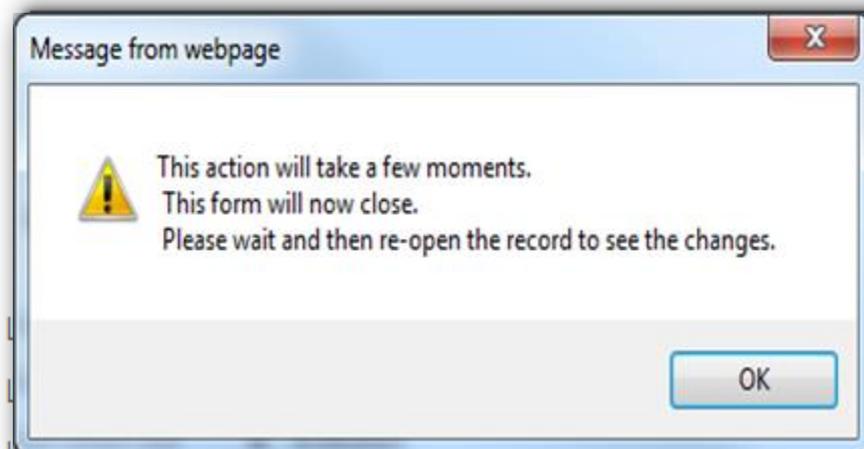
Draft Distributed Date

6/16/2015

Communication & Learning

Community Membership

Day to Day Life



The following Pop-up will alert you that the action you choose can take some time to complete. Typically this is a quick process

Draft Distributed Phase

Discovery Management Associate... Search for records

ADD EXISTING DISCOVER... COPY A LINK EMAIL A LINK CHART PANE ...

Individual ↑	Name	Phase	Communication Learning As Of	Community Me..	Day to Day Life...	Employment As...	Finance As Of	Getting Around...	Health and W
✓ Arnez STEARN	Discovery Results Management	Draft Distributed	6/15/2015	4/8/2015	6/16/2015	4/8/2015	4/8/2015	4/8/2015	4/8/2015

When you look at your Discovery Management Dashboard you will see that the Discovery Management result has been moved to the Draft Distributed Phase.

You are also able to see the last edited date associated with each of the Discovery Modules within Discovery Management.

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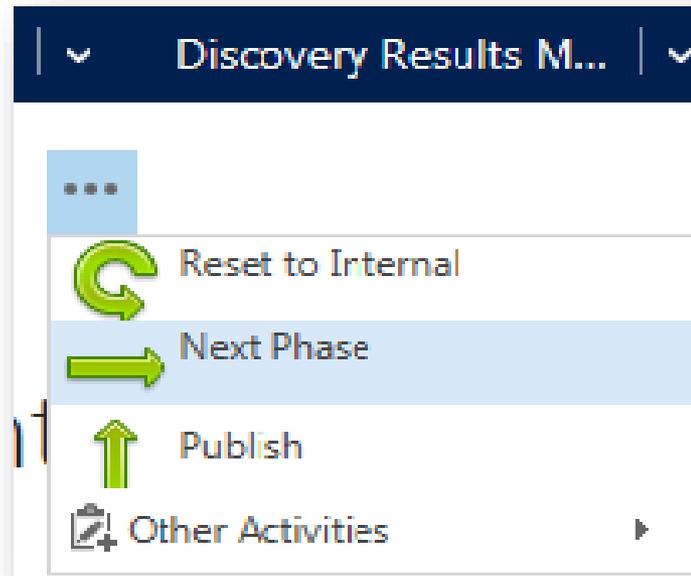
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Publish



After you have received feed back and made the necessary edits to the different discovery modules; you are ready to “**Publish**” Discovery Results Management. Select the ellipsis and then select “**Publish**”. You also have the ability set the Discovery Results Management back to Working Draft Internal, select “**Rest to Internal**”.

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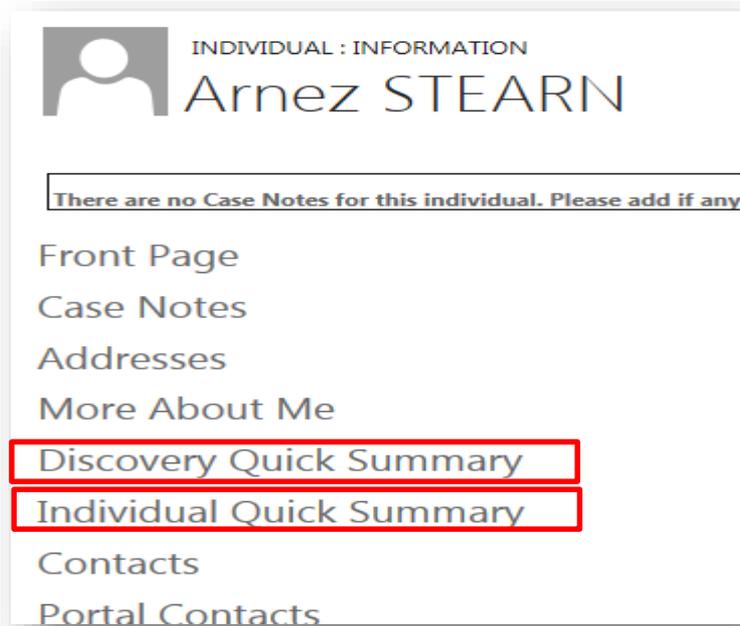
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Discovery Quick Summary



INDIVIDUAL : INFORMATION
Arnez STEARN

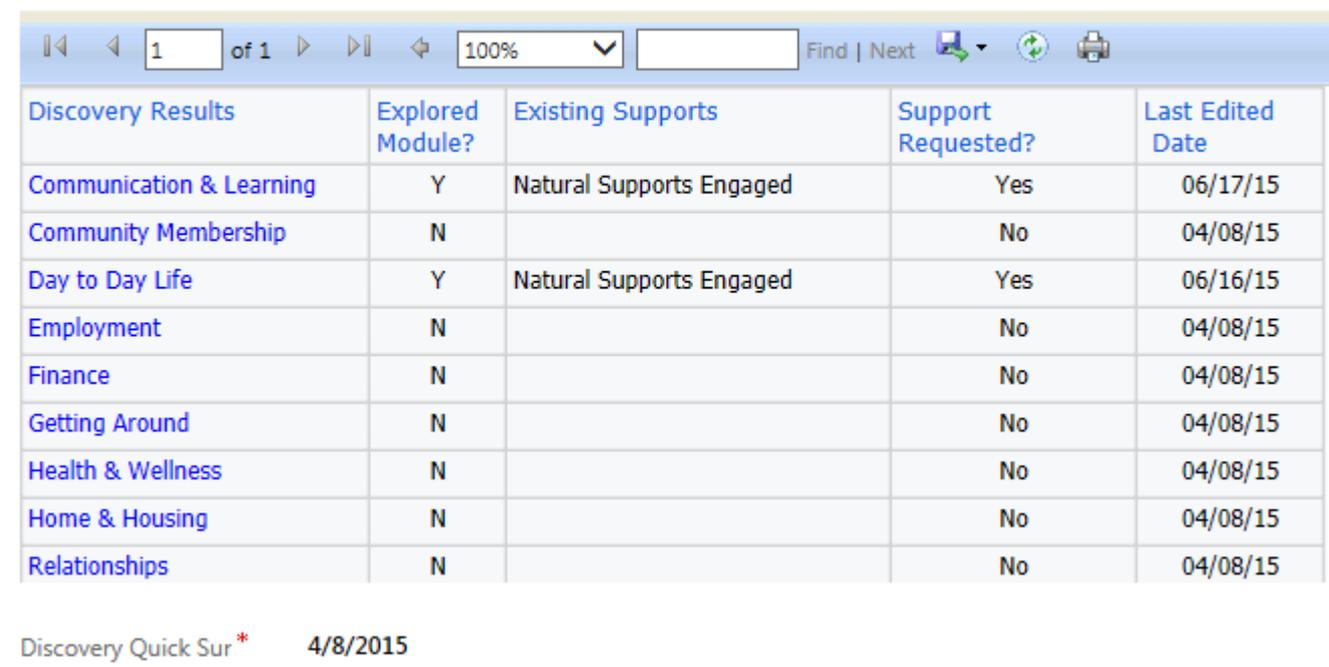
There are no Case Notes for this individual. Please add if any.

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

Once you have Published the Discovery Results you will have the ability to view a Discovery Quick Summary and an Individual Quick Summary. These are located on the Individuals dash board.

Expanding Discovery Quick Summary

Discovery Quick Summary



The screenshot shows a web application interface for 'Discovery Quick Summary'. At the top, there is a navigation bar with a search box containing '1 of 1', a zoom level of '100%', and buttons for 'Find | Next', 'Print', and 'Refresh'. Below the navigation bar is a table with five columns: 'Discovery Results', 'Explored Module?', 'Existing Supports', 'Support Requested?', and 'Last Edited Date'. The table lists nine modules with their respective exploration status and support request status. At the bottom of the table, there is a footer that reads 'Discovery Quick Sur* 4/8/2015'.

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

The Discovery Quick Summary allows you to see the status of each of the modules within Discovery Results Management

Run Report

INDIVIDUAL : INFORMATION
Arnez STEARN

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

Front Page
Case Notes
Addresses
More About M
Discovery Qui

DODD# 9845190 Medicaid ID XXXXXXXX6201 Reporting County HARR

Active

To Print the Discovery Results that are part of the Discovery Management you completed, you will need to select the ellipsis on the Front Page of the Individual. Within the menu that opens up select "Run Report". A new menu will open up, on this menu select "Discovery Results".

Printed Discovery Results

The screenshot shows a web application interface. At the top, there is a 'File' menu and a 'Help' icon. Below that is an 'Edit Filter' button. A navigation bar contains a page indicator '1 of 3', a '100%' zoom level, and a 'Find | Next' search function. A red box highlights a printer icon in the navigation bar. The main content area features the Harrison County Board of Developmental Disabilities logo and the title 'Discovery Results for Arnez STEARN'. Below this is a section titled 'Communication & Learning' with a table of results. The table has three columns: 'Explored Module? Yes', 'Supports Needed? Yes', and 'Existing Supports: Natural Supports Engaged'. The first row shows 'Communication' under 'Expressing Yourself' with 'Abilities:' and 'Existing Supports:' listed. The second row shows 'Understanding Others' with 'Abilities:' and 'Existing Supports:' listed.

When you select the Run Report option a pop-up will open that displays all of the discovery modules that are contained within Discovery Management. This display will include all of the discovery modules even if they have not been populated with information. You can scroll through the screen to see all of the discovery modules.

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