



SSA - Outcomes

July 01, 2015

DODD

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Starting Outcome or Edit an existing Outcome

Add Service Listing

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Overview

- What is an Outcome
- What is a Service Listing
- What is a Service Summary
- What is an Action Plan
- What are Action Steps

Overview

- What is an Outcome
 - Goals and desired achievements of the Individual revealed during Discovery.
 - An Outcome can not extend beyond the Individuals determination period.
 - Outcomes are printed in the ISP

Overview

- **What is a Service Listing**
 - A listing of the services and providers that will be used to achieve the Outcome
 - Service Listing is associated to an Outcome and Service Summary is associated to a Service Listing

Overview

- What is a Service Summary
 - Financial Structure that provides a budget amount and date range for all Service Listings
 - Service Listing is associated to an Outcome and Service Summary is associated to a Service Listing

Overview

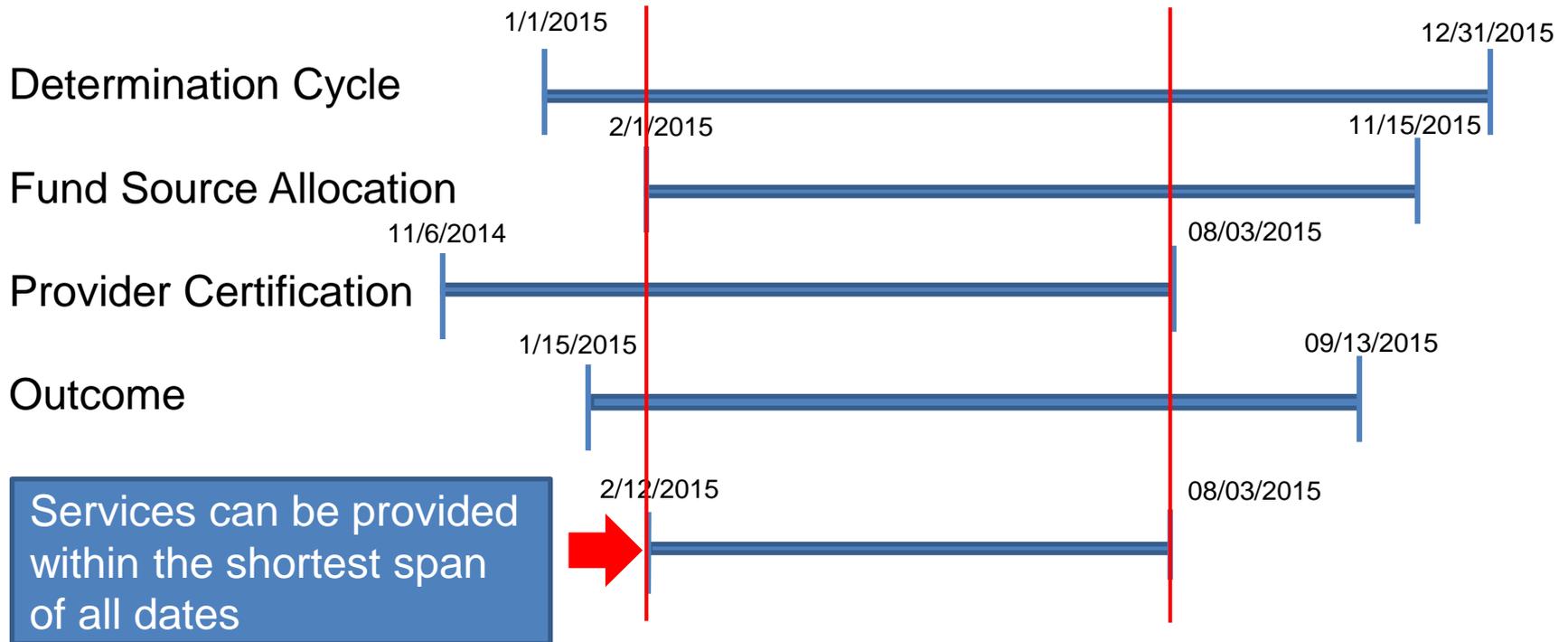
- What is an Action Plan
 - This is the outline of how the Outcome will be completed
 - The connecting piece for the Provider, Outcome, Services and Action Steps

Overview

- What are Action Steps
 - Description of how the Provider will achieve the Action Plan
 - The Provider completes that Action Steps

Overview

Understanding Date Range



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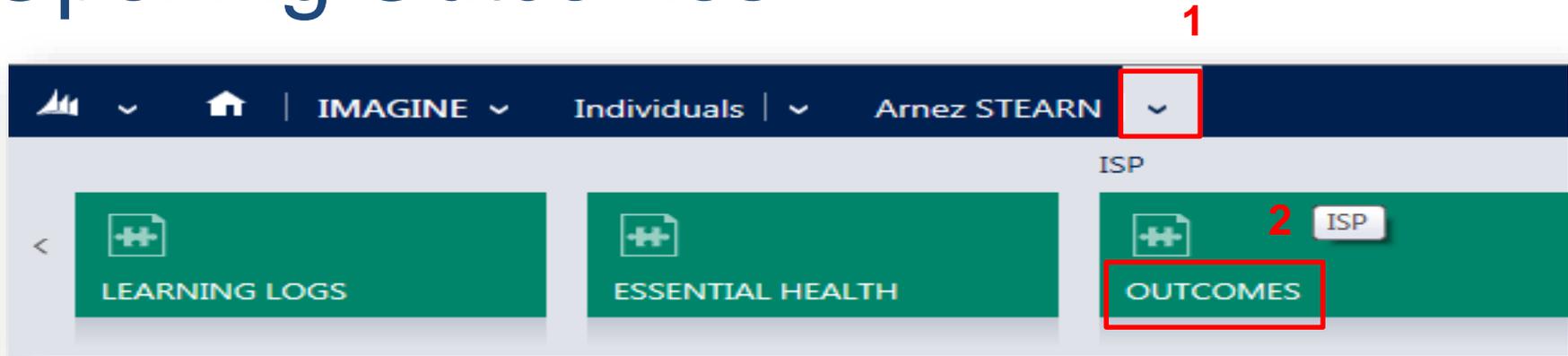
Updated Ellipsis menu

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Opening Outcomes



As an SSA once you sign into the *imagineIS* application, you will navigate to and select an individual. After you open the individual select the down arrow next to their name and browse to the Outcomes menu.

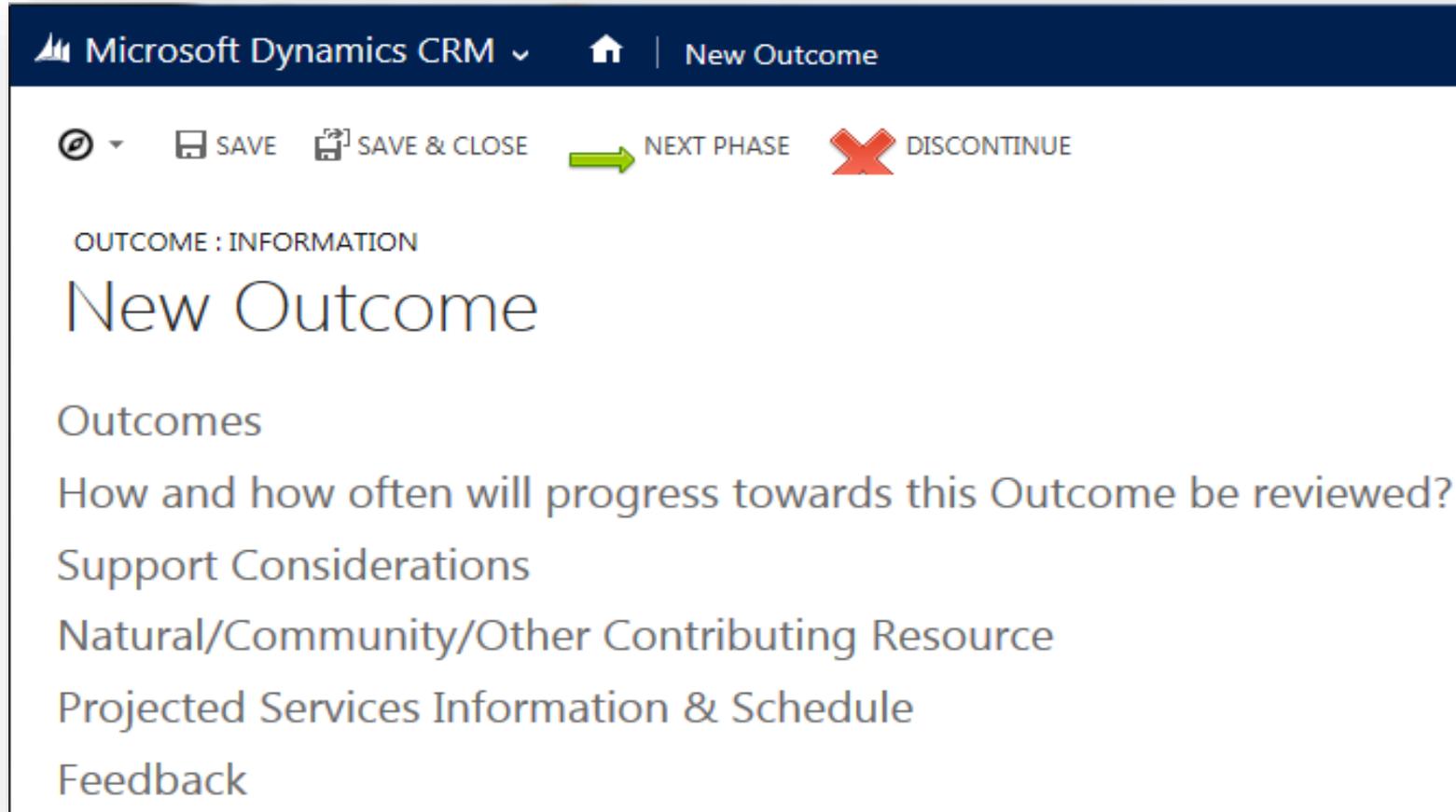
Choosing a new or choosing existing

Outcome Associated View ▾

🔍 ▾ **+ ADD NEW OUTCOME** 📊 CHART PANE ▾ 📄 RUN REPORT ▾ 📄 EXPORT OUTCOMES

✓ Individual	Current As Of ↑	Status	Name ↑	Discovered In
Arnez STEARN	6/15/2015	Draft Distributed	Learn how to communicate with others	Communication & Learning
Arnez STEARN	6/18/2015	Draft Distributed	Planning Worksheet	Communication & Learning

+ ADD NEW OUTCOME



The screenshot shows the Microsoft Dynamics CRM interface for creating a new outcome. The top navigation bar includes the Microsoft Dynamics CRM logo, a home icon, and the text 'New Outcome'. Below the navigation bar is a ribbon with several buttons: a search icon, 'SAVE', 'SAVE & CLOSE', a green arrow pointing right labeled 'NEXT PHASE', and a red 'X' icon labeled 'DISCONTINUE'. The main content area is titled 'OUTCOME : INFORMATION' and 'New Outcome'. Below the title, there are several sections: 'Outcomes', 'How and how often will progress towards this Outcome be reviewed?', 'Support Considerations', 'Natural/Community/Other Contributing Resource', 'Projected Services Information & Schedule', and 'Feedback'.

New Outcome Fields

New Outcome

Outcomes

Current As Of  --

Outcome Name * Learn to Create Outcomes

Desired Outcome * SSA's will learn to create Outcomes in imagineIS

Projected Start Date * 6/30/2015

Projected Completion * 8/5/2015

Priority * 1

How will we balance *

We will monitor the questions that the SSA's and separate them based on system need or SSA want.

How are Community *

The community resources are State Provided machines which equal Tax payer dollars. Other than this no community resources or natural resources will be used.

Status  Working Draft - Internal

Discovered In * Communication & Learning

So that/In order to * Complete their job within imagineIS

Emergency Request No

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Add Service Listing

OUTCOME : INFORMATION

Newark Communication Services

Individual

🔒 Arnez STEARNS

Projected Start*

🔒 6/23/2015

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

Selecting Add

Projected Services Information & Schedule

Service Listing



Outcome	Category	Sub-Category	Provider	Start Date	End Date ↑	Funding Source Group	Item Descriptio
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No Service Listing records found.

To add a new Service List you will need to click the “+”

Service Listing Fields

New Service Listing

Service Listing

Outcome *		Newark Communication Services	Provider	--
Funding Source Group *	🔒	LCL	Units for Planning *	--
Category *		--	How Much *	--
Sub-Category *		--	How Often *	--
Start Date *		--	Outcome Start Date	6/23/2015
End Date *		--	Outcome End Date	6/30/2015
Item Description		--		

Service Listing Category

Service Listing			
Outcome*	Newark Communication Services	Provider	LOCAL Provider KAL
Funding Source Group*	LCL	Units for Planning*	Item
Category*	Equipment & Supplies	How Much*	12
Sub-Category*	Adaptive Assistive Equipment	How Often*	Monthly
Start Date*	6/25/2015	Outcome Start Date	6/23/2015
End Date*	6/28/2015	Outcome End Date	6/30/2015
Item Description	--		

When entering the Start and End dates please be aware that there is an initial check against the Outcome date range. The user will receive an error when saving the Service Listing date span is not within the Outcome Date Span. The Budget Support Specialist will not have the Service Listing available to cost if the Service Listing range is outside of the Fiscal Year, Allocation, Service item on allocation start and end date or the Provider's certification date range and No alerts or notification will result.

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Saving New Outcome

SSADalmations D...
imagine

SAVE SAVE & CLOSE CONNECT EMAIL A LINK

OUTCOME : INFORMATION

Newark Communication Services

Individual: Arnez STEAR
Projected Start*: 6/23/2015
Projected Completion*: 6/30/2015

Outcomes

Current As Of	6/29/2015	Status	Active
Outcome Name *	Newark Communication Services	Discovered In *	Communication & Learning
Desired Outcome *	Arnez would like the ability to feel comfortable talking with others		
Projected Start Date *	6/23/2015	So that/In order to *	Go to the library
Projected Completion *	6/30/2015		
Priority *	3	Emergency Request	No
How will we balance *	We will wing it		

Outcome Status

Outcomes

Current As Of	 6/29/2015	Status	 Working Draft - Internal
Outcome Name *	Newark Communication Services	Discovered In *	Communication & Learning

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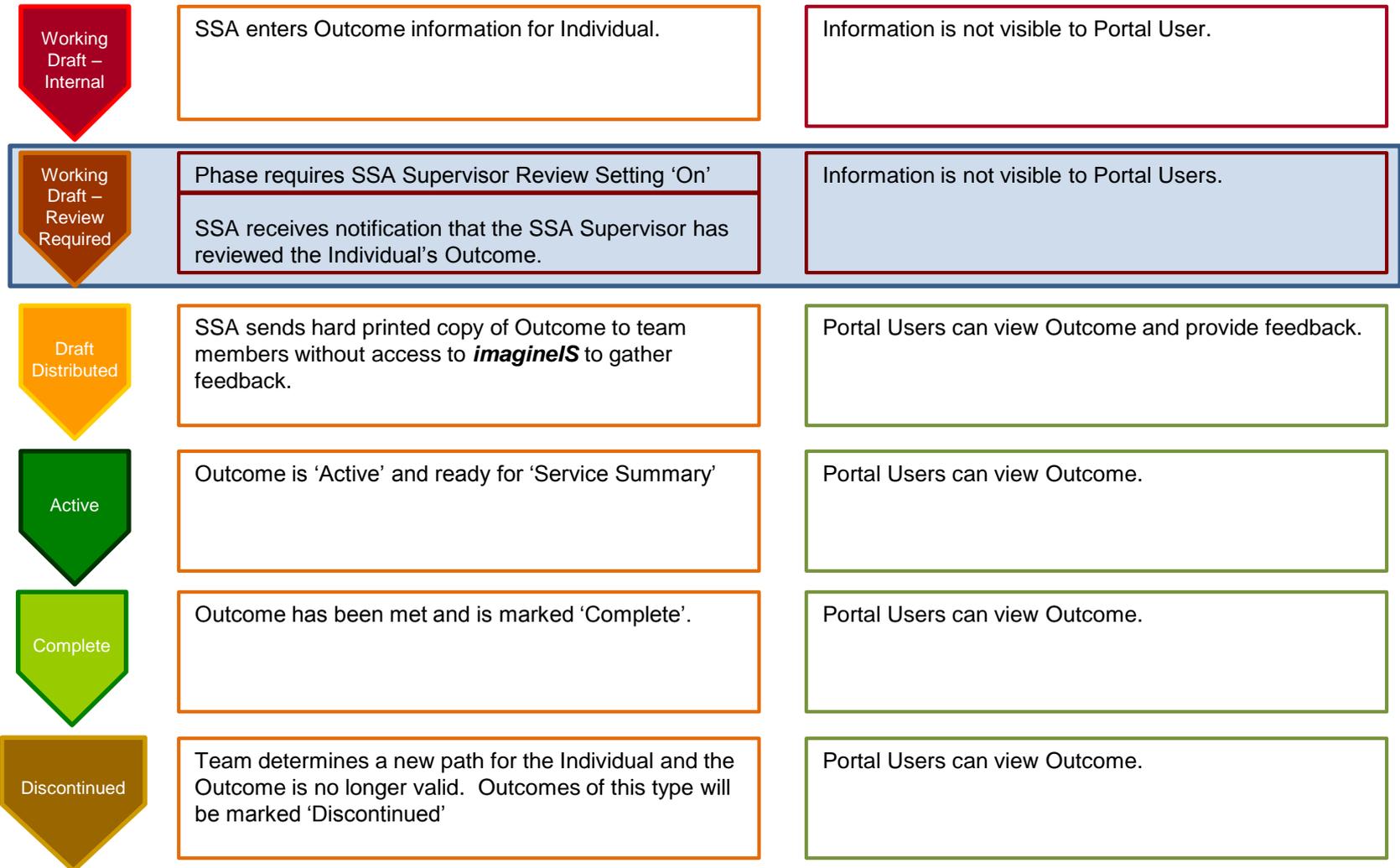
Updated Ellipsis menu

Service Summary

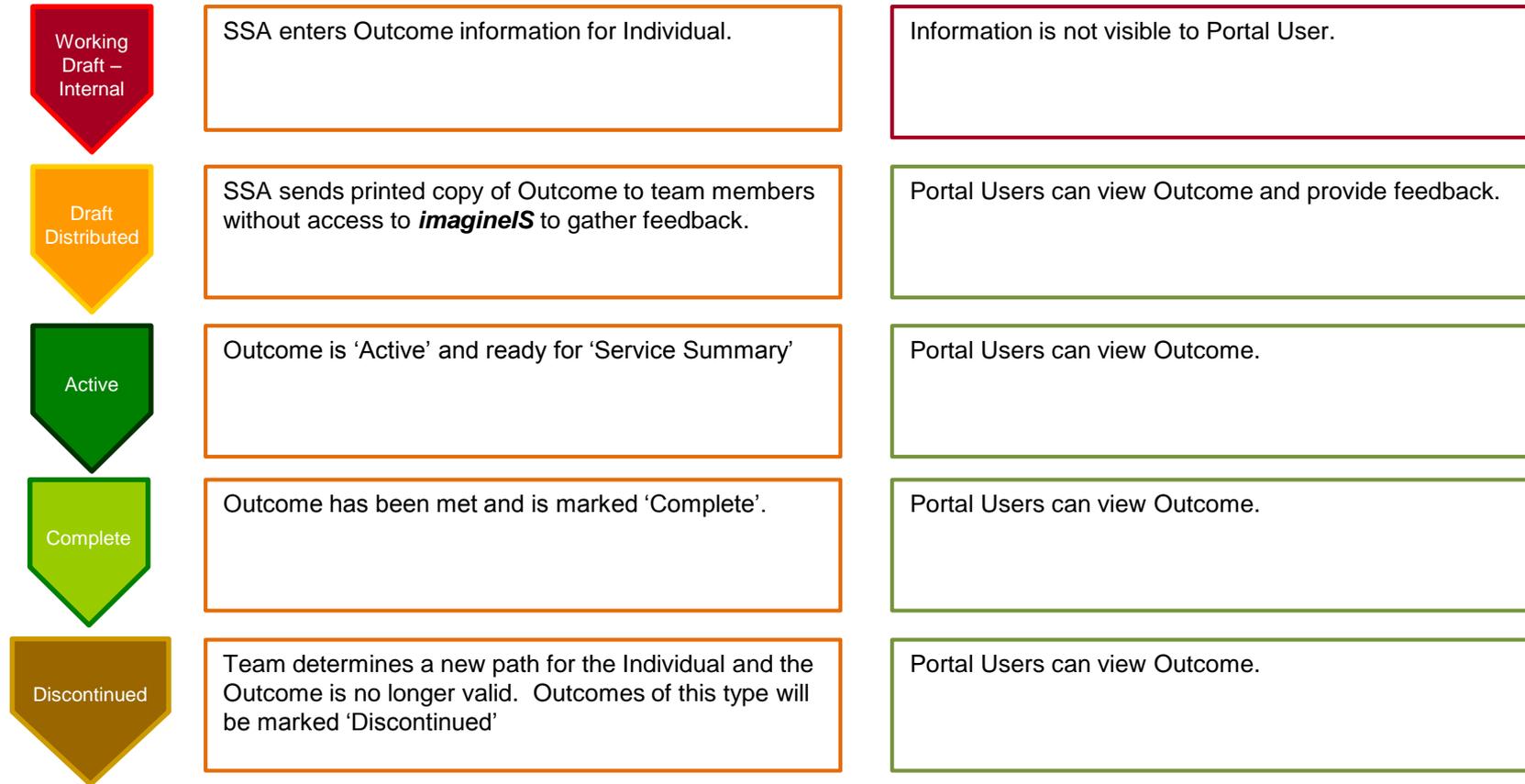
Action Plan

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Outcome Phasing - Supervisor Review



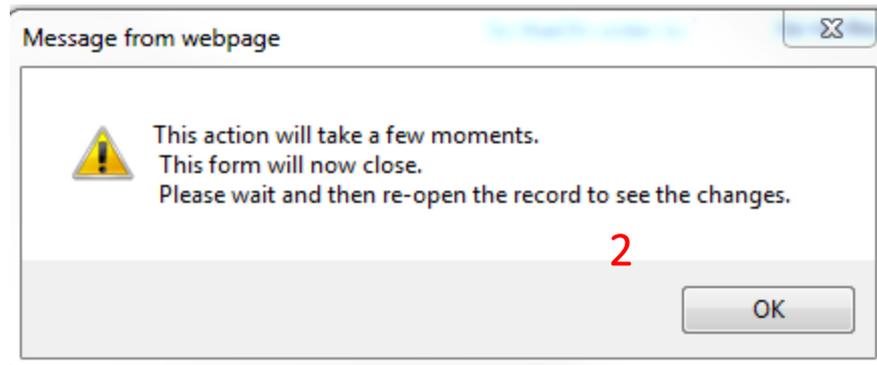
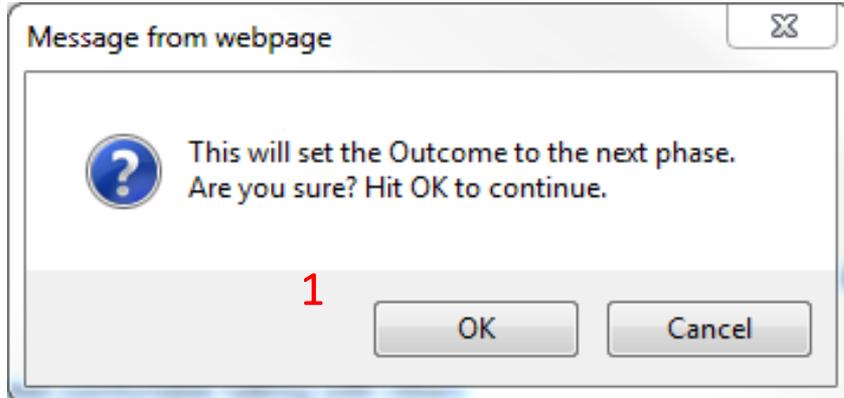
Outcome Phasing – Non Supervisor Review



Outcome Phases

The screenshot displays the IMAGINE software interface. At the top, the navigation bar includes 'IMAGINE', 'Individuals', and 'Newark Communica...'. Below this, a toolbar contains icons for 'SAVE', 'SAVE & CLOSE', 'CONNECT', and 'EMAIL A LINK'. The main content area is titled 'OUTCOME : INFORMATION' and 'Newark Communication Service'. Below the title, there are three columns of information: 'Individual' (Arnez STEAR...), 'Projected Start*' (6/23/2015), and 'Projected Completion*' (6/30/2015). On the right side, a dropdown menu is open, listing several actions: 'Run Workflow', 'Start Dialog', 'Run Report', 'Next Phase' (highlighted with a red box and a green arrow), 'Discontinue', and 'Other Activities'.

Setting to Next Phase Warnings



Draft Distributed Phase

Outcomes

Current As Of	 6/29/2015	Status	 Draft Distributed
Outcome Name *	Newark Communication Services	Discovered In *	Communication & Learning

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Updated Ellipsis menu

The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', 'IMAGINE', 'Individuals', and 'Newark Communica...'. The right side of the navigation bar shows 'Create', 'SSADalmations D...', and the user 'imagine'. Below the navigation bar, a toolbar contains 'SAVE', 'SAVE & CLOSE', 'CONNECT', and 'EMAIL A LINK'. A three-dot ellipsis menu is open, showing options: 'Run Workflow', 'Start Dialog', 'Run Report', 'Reset to Internal', 'Discontinue', 'Activate', and 'Other Activities'. The 'Reset to Internal', 'Discontinue', and 'Activate' options are highlighted with a red box. The main content area shows 'OUTCOME : INFORMATION' for 'Newark Communication Service'. Below this, the 'Outcomes' section lists details: 'Current As Of' (6/29/2015), 'Outcome Name*' (Newark Communication Services), 'Desired Outcome*' (Arnez would like the ability to feel comfortable talking with others), 'Projected Start Date*' (6/23/2015), 'Projected Completion Date*' (6/30/2015), 'Priority*' (3), and 'How will we balance*' (We will wing it). On the right, a summary card shows 'Individual' (Arnez STEAF), 'Projected Start*' (6/23/2015), and 'Projected Completion Date*' (6/30/2015). Below the summary card, there are sections for 'Draft Distributed' (Communication & Learning) and 'Go to the library' (Emergency Request: No).

Option to complete the Outcome

The screenshot displays the Microsoft Dynamics CRM interface for an outcome record. The top navigation bar includes 'Microsoft Dynamics CRM', 'IMAGINE', 'Individuals', and 'Newark Communica...'. The main area shows the outcome 'Newark Communication Services' with a dropdown menu open, highlighting the 'Complete' option. The 'Outcomes' section lists details for the outcome, and the right sidebar shows related information like 'Individual Arnez STEAR' and 'Projected Start' date.

Microsoft Dynamics CRM | IMAGINE | Individuals | Newark Communica... | Create | SSADalmations D... imagine

SAVE | SAVE & CLOSE | CONNECT | EMAIL A LINK

OUTCOME : INFORMATION

Newark Communication Services

Run Workflow
Start Dialog
Run Report
Reset to Internal
Discontinue
Complete
Other Activities

Individual
Arnez STEAR
Projected Start*
6/23/2015
Projected Completion*
6/30/2015

Outcomes

Current As Of 6/29/2015

Outcome Name* Newark Communication Services

Desired Outcome* Arnez would like the ability to feel comfortable talking with others

Projected Start Date* 6/23/2015 So that/In order to* Go to the library

Projected Completion* 6/30/2015

Priority* 3

Active
Communication & Learning

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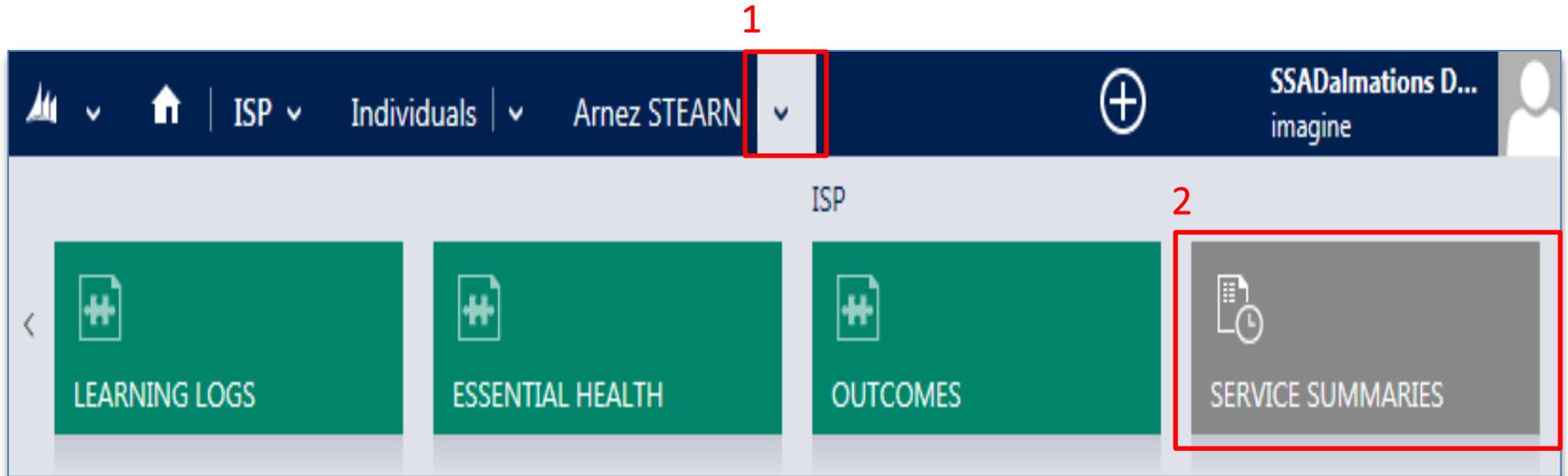
Updated Ellipsis menu

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Selecting the Service Summary Menu



Current and Future Service Summary

Service Summary Associated View Search for records 🔍

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 Budge ▼	🔄
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	

The Service Summary listing will always show two Service Summaries. One will be Current and the other will be **Future**. Unless you are entering information for a future Service, which means you will have a future “to begin” date and a future “to complete” date, you should select the **Current** summary.

Current Service Summary

SERVICE SUMMARY : INFORMATION

Service Summary - 6/1/2015 - 5/31/2...

Individual*
Arnez STEARN | ISP
ISP

General

Service Summary

Current As Of	6/22/2015	Quote ID*	SS-02922-Q6Q1T5
Name*	Service Summary - 6/1/2015 - 5/31/2016 - Arnez STEARN	Revision ID*	0
Total Amount	\$0.00	Assigned Finance Manager*	Sultan FMAgrabah
Status Reason	Working Draft	Budget Support Specialist*	Sultan BSAgrabah
Individual's Local Services Budget Amount	\$2,000.00	Remaining Local Services Budget Amount	\$2,000.00
Price List	Harrison County Price List		

Individual Budget Year

Individual's Budget Start Date	6/1/2015	Individual's Budget End Date	5/31/2016
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
Arnez STEARN	Equipment & Supplies	Medical Supplies	LOCAL Provid...	6/24/2015	6/29/2015	LCL		1	Item	Daily

Run Workflow

The screenshot shows a software interface with a dark blue header bar containing navigation icons and text: 'ISP', 'Service Summaries', and 'Service Summary -...'. Below the header is a toolbar with icons for 'SAVE', 'SAVE & CLOSE', 'RECALCULATE', and 'PRINT SERVICE SUMMARY...'. A red box labeled '1' highlights an ellipsis menu icon (three dots) in the toolbar. A dropdown menu is open, showing options: 'Email a Link', 'Run Workflow' (highlighted with a red box labeled '2'), 'Start Dialog', 'Run Report', and 'Other Activities'. The main content area displays 'SERVICE SUMMARY : INFORMATION' and 'Service Summary - 2/1/2015 - 1/31'. A 'General' tab is visible at the bottom left.

After you save the updates that you made to the Service Summary. Select the ellipsis and then select “**Run Workflow**”, this will send the alert to the BSS that you are ready for their review of the Service Summary.

Selecting the Workflow

Look Up Record

Enter your search criteria.

Look for **Show Only My Records**

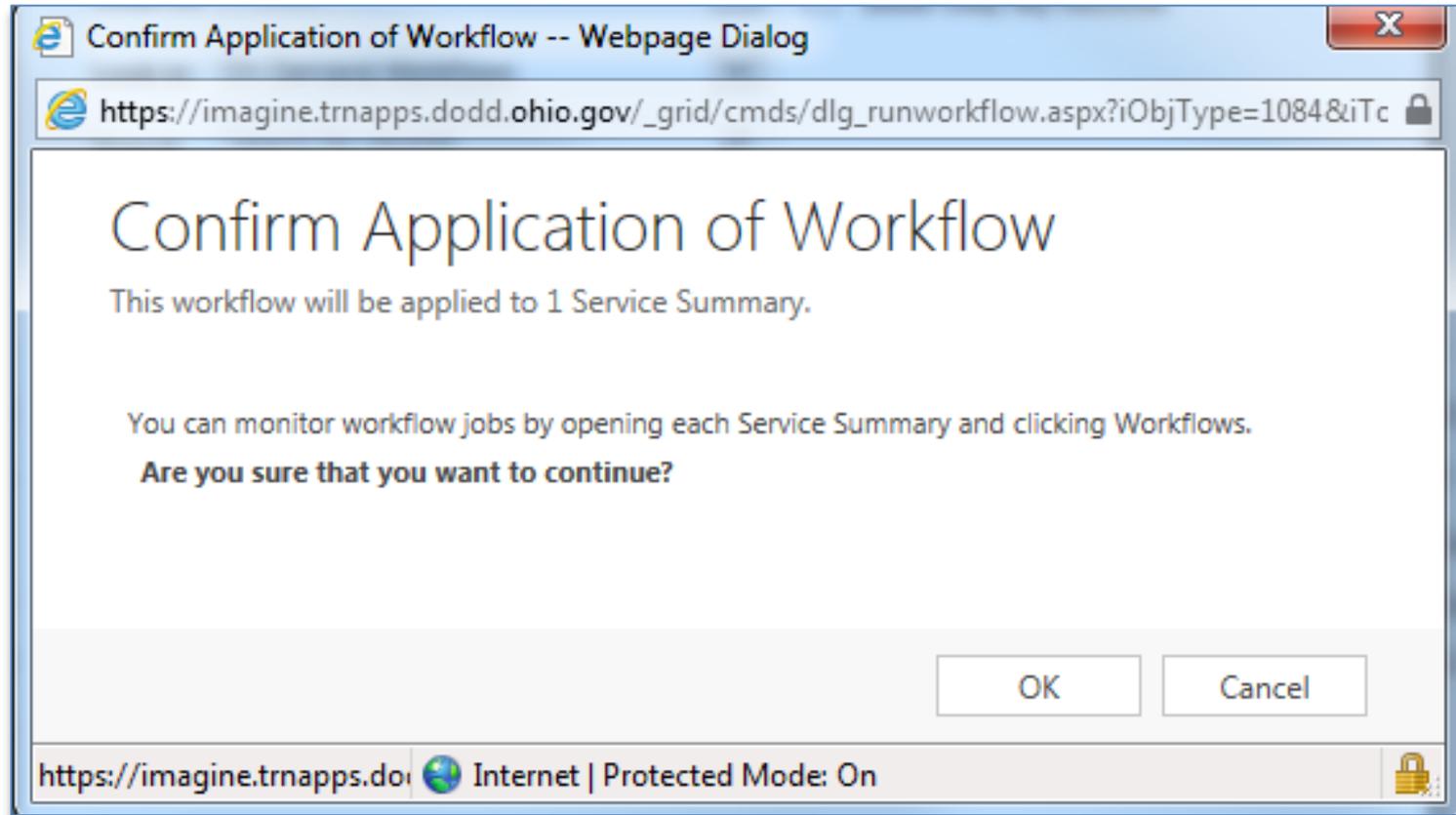
Look in

Search

	Process Name	Category	Created On	Mod	🔄
✓	Notification - Cost Projection Needs...	Workflow	9/27/2013 3:47...	12/2/2014	
	Service Summary - Approve Request	Workflow	8/20/2013 8:45...	12/2/2014	
	Notification - To Assigned SSA - Cost...	Workflow	11/15/2013 9:32...	12/2/2014	
	Reset Service Summary to Working D...	Workflow	9/27/2013 3:47...	12/2/2014	

1 - 4 of 4 (1 selected) Page 1

Confirm Workflow



Post Workflow Confirmation

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

Individual* | ISP
Arnez STEARN | ISP

After you select OK on the confirmation window, the system will bring you back to the Service Summary window.

General

Service Summary

Current As Of	6/22/2015	Quote ID*	SS-02922-Q6Q1T5
Name*	Service Summary -	Revision ID*	0
Total Amount	\$0.00	Assigned Finance Manager*	<u>Sultan FMAgrabah</u>
Status Reason	Working Draft	Budget Support Specialist*	<u>Sultan BSGrabah</u>
Individual's Local Services Budget Amount	\$2,000.00	Remaining Local Services Budget Amount	\$2,000.00
Price List	<u>Harrison County Pr</u> :		

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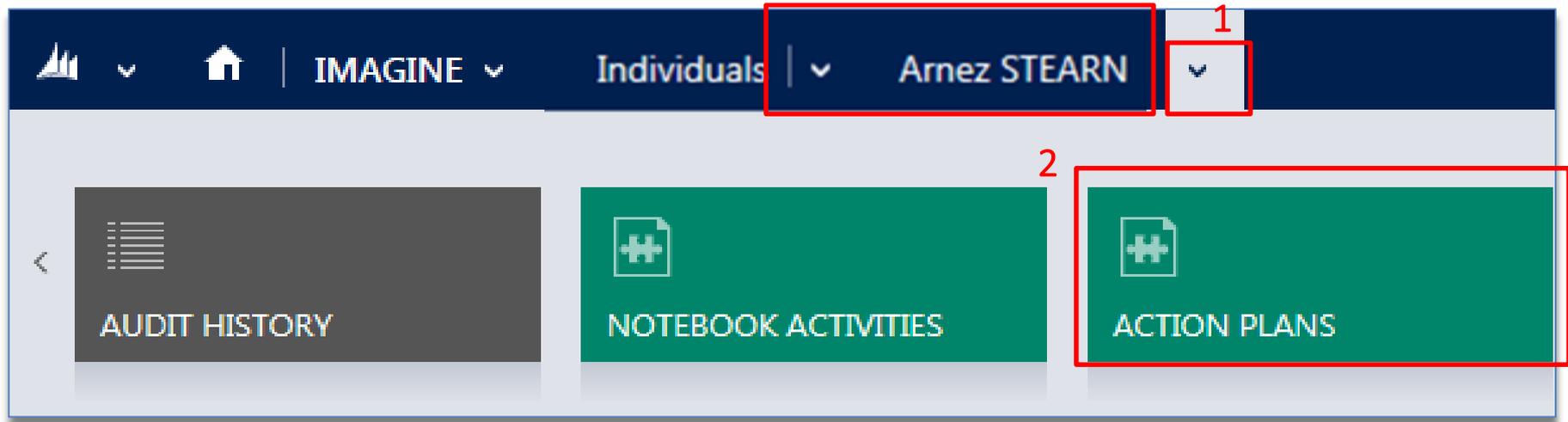
Updated Ellipsis menu

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Creating an Action Plan



The Action Plan menu is accessible only through the Outcome. So you will need to open the Outcome before you can open the Action Plans menu.

Add New Action Plan

OUTCOME : INFORMATION

Newark Communication Services

Action Plans Associated View ▾



+ ADD NEW ACTION PLANS



ADD EXISTING ACTION PL...



CHART PANE ▾



RUN REPORT ▾



Action Plan Menus

ACTION PLANS : INFORMATION

Newark Communication Services

General

Support Considerations

Action Steps

Action Plan General

🔍 ▾ 📁 SAVE 📁 SAVE & CLOSE + NEW

ACTION PLANS : INFORMATION

Newark Communication Services

Individual | Outcome
🔒 Arnez STEAR | 🔒 VT Hokies in

General

Current As Of	🔒 --	Phase	Draft
Name	VT Hokies in 2015	Module	🔒 Communication & Learning
Outcome First Active	6/23/2015	Projected Outcome C	6/30/2015
Assigned Provider	--	Action Plan Progress	🔒 Weekly
Action Plan Active	🔒 --		

Action Plan General

🔍 SAVE SAVE & CLOSE + NEW

ACTION PLANS : INFORMATION

Newark Communication Services

Individual: Arnez STEAR | Outcome: Newark Com

General

Current As Of	--	Phase	Draft
Name	Newark Communication Services	Module	Communication & Learning
Outcome First Active	6/23/2015	Projected Outcome C	6/30/2015
Assigned Provider	--	Action Plan Progress	Weekly
Action Plan Active	--		

This displays the last date the Action Plan was edited

This will allow you to select the provider that will completed the Action Plan

This will reflect the date that the Action Plan Phase becomes active

Action Plan Support Considerations

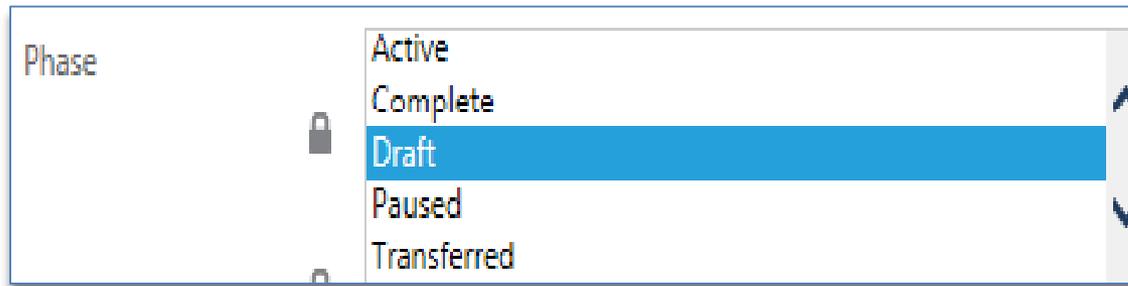
Support Considerations					
Role	--				
Core Responsibilities	--	Be Creative/User Jud	--	Not a Paid Responsibi	--
Role	--				
Core Responsibilities	--	Be Creative/User Jud	--	Not a Paid Responsibi	--

Action Steps

Action Steps				
<u>How will we accomplish the Outcome?</u>				
Subject ↑	Regarding	Activity Status	Priority	
To enable this content, create the record.				

Action Steps will be populated by the Provider via the Provider Portal.
As the Action steps are being saved they will be updated

Action Plan Phasing



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