imagine
Information System (IS)
Ohio Department of Developmental Disabilities

Advanced User Reference

July 09, 2015

DODD

Contents

Contents

Overview

<u>Description</u>

This training will instruct designated county board members who are responsible for assisting other board members with the ***imagineIS*** application. Training will takes place in a dedicated training environment, after which the newly gained skills will be applied to the production environment using real cases.

<u>Who should attend?</u>

Anyone designated as a Super User in the imagineIS application.

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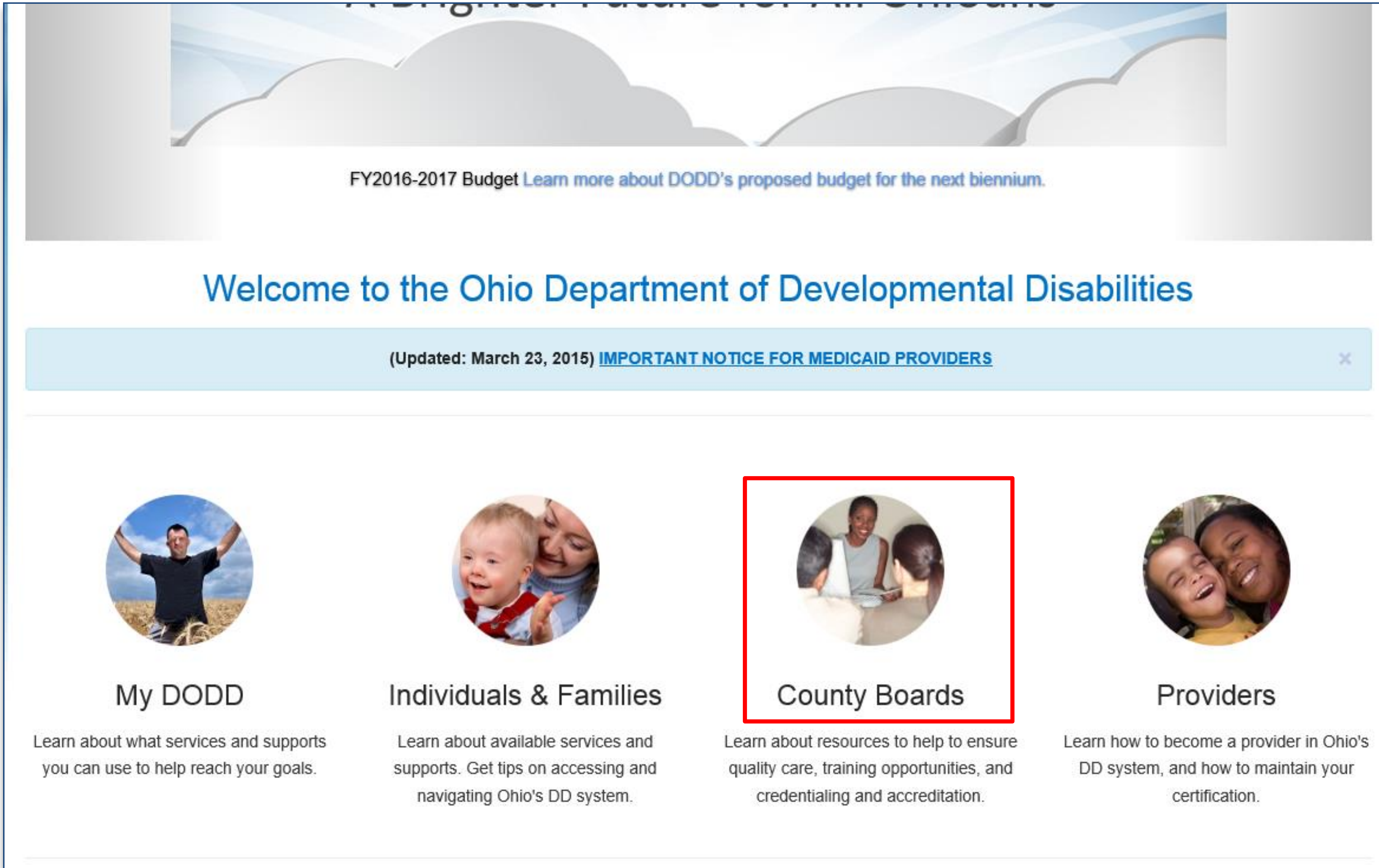
Register New Associated (County Board Worker)



Register New Associated (County Board Worker)

Home ➔ County Boards

County Boards

Welcome

We have rebuilt our website and provided a single point of access to information for the general public, and a portal for service providers and County Board staff to conduct daily business with DODD. County Board staff also may access reports and business applications directly from this site. We hope this redesign helps you to find the information you need more easily!

Overview

DODD is responsible for the regulatory oversight of Ohio's 88 County Boards of Developmental Disabilities (County Boards). In this capacity, DODD is charged with supporting County Boards by providing training and technical assistance through the support of regional consultants; ensuring quality of care, good business practices, and wise use of taxpayer dollars through the state accreditation process; and, credentialing County Board employees through the registration and certification process.

Update County Board Info

Contact information can be added and maintained for County Board employees by accessing the CNT application. This information easily updateable.

Quick Links

- Change Password
- New Account Enrollment
- Update my Account Profile
- Update my Account Access

County Board Office Locations

Use this Interactive map to contact each County Board Office.

Register New Associated (County Board Worker)

New User Account Registration

Please allow 5 - 10 minutes to complete our registration request pro

Step 1: Indicate the account type.

So - what kind of account are you creating today?

◯ I am a County Board Worker

Continue

New User Account Registration

Please allow 5 - 10 minutes to complete our registration request process.

Step 1: You have informed us that you **are a County Board Worker**

Step 2: Select your County Affiliation

Please select the County you wish to affiliate: Morgan County

Go Back Continue

New User Account Registration

Please allow 5 - 10 minutes to complete our registration request process.

Step 1: You have informed us that you **are a County Board Worker**
Step 2: You have selected your affiliation as **Morgan County.**

Step 3: Select your function as the user of the new account.

Now select the account holder's **primary** function: Finance Manager

Go Back Continue

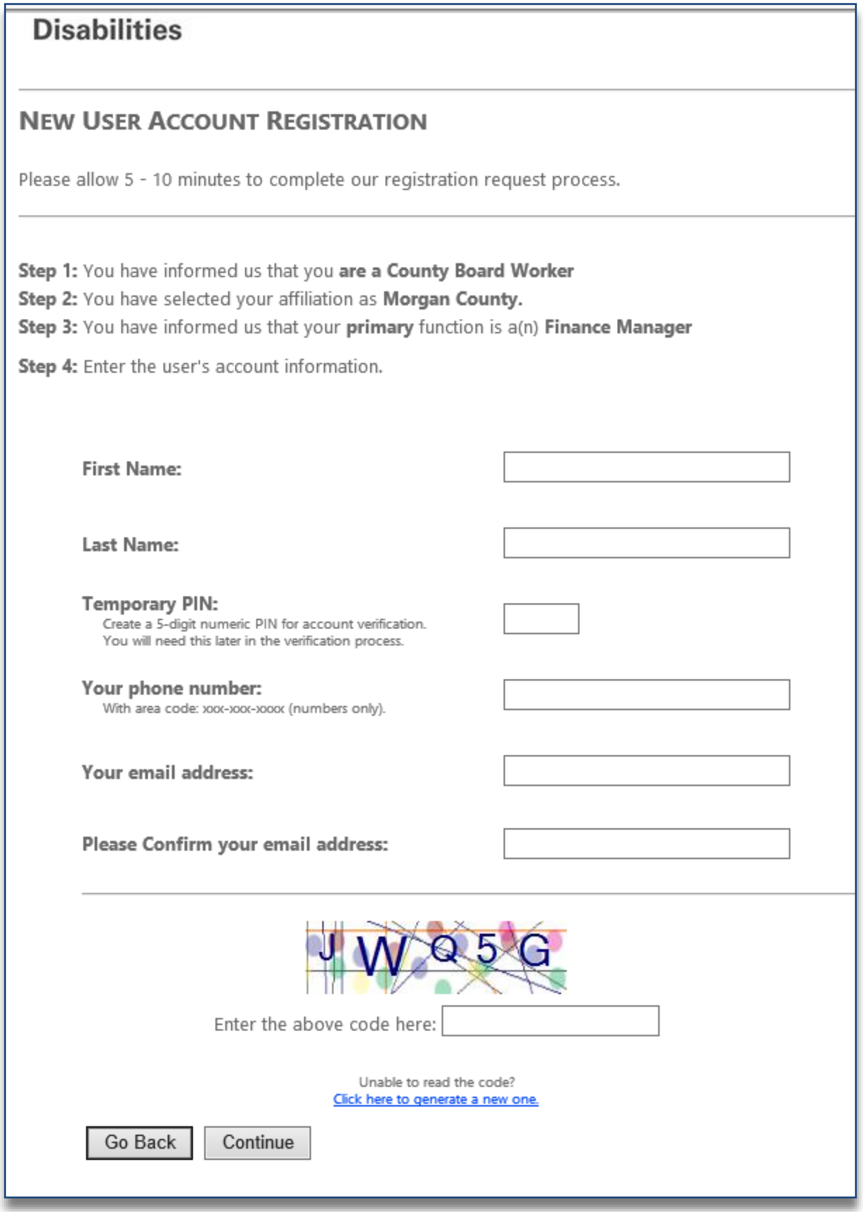
Register New Associated (County Board Worker)

Complete the remainder of the registration process using your information and work or other email which you can check from here.

After completing the Finance Manager also create a logon for the following using the same county (Morgan):

- Behavior Support (BSC)/Human Rights (HRC)
- Budget Support
- Customer Guide
- SSA
- SSA Manager/Director

For this class and the follow on classes you will need these roles to complete the tasks.



Disabilities

NEW USER ACCOUNT REGISTRATION

Please allow 5 - 10 minutes to complete our registration request process.

Step 1: You have informed us that you **are a County Board Worker**
Step 2: You have selected your affiliation as **Morgan County.**
Step 3: You have informed us that your **primary** function is a(n) **Finance Manager**

Step 4: Enter the user's account information.

First Name:

Last Name:

Temporary PIN:
Create a 5-digit numeric PIN for account verification.
You will need this later in the verification process.

Your phone number:
With area code: xxx-xxx-xxxx (numbers only).

Your email address:

Please Confirm your email address:

J W Q 5 G

Enter the above code here:

Unable to read the code?
Click here to generate a new one.

Go Back | Continue

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Contact Type and Relationships

What kinds of Relationships are there?

- **Assigned Team Member –** Potential team members include anyone who the individual knows well and feels will be a part of the support process. Assigned Team Members are people who are assigned to help the person accomplish outcomes that are meaningful to them. Assigned team members are either someone who will be working on action plans or they are someone who must agree to the plan.

- **Contributing Team Member -** These are team members which provide contributions to the individual and plan. Their inputs and feedback is important to the success of the Support Plan (ISP) but are not agreeing to provide services and therefore do not require them to agree or disagree to the individuals support plan. These team members do not complete action steps or learning logs. (These type relationships will NOT have Portal access)

Contact Type and Relationships

What kinds of <u>Contact Types</u> are there?

- **1 – Family** – As the title implies this is a family member to the individual. This type connection can have portal access when connected as an Assigned team member

- **2 – Guardian** – This is the legal guardian for the individual. If this is also a family member this can be identified in the 'Relationship' field f the connection. This type connection can have portal access when connected as an Assigned team member (Only 1 active (dates) Guardian can be connected to an individual at a time) (reflects on the ISP Agreement Tracker)

- **3 – Co-Guardian** - This is the co -legal guardian for the individual. If this is also a family member this can be identified in the 'Relationship' field f the connection. This type connection will not have portal access when connected as any type Team Member.

- **4 – Program Manager** – This is a direct Program manager for the individual which provides supports. This type contact type will not have portal access when connected as any type Team Member. (This can be used to add the Program manager to the 'rolodex' for reference, not to connect to portal or provider)

- **4 – Provider** – This is <u>ALL providers (independent/Agency/etc) which provide a service to the individual</u> and will be listed in some manner on the Outcome, must agree to the ISP, and may or may not need/have Portal access. (Portal access is only granted when identified as 'Assigned Team Member') (reflects on the ISP Agreement Tracker)

- **5 – Medical** – This is medical support or other medical type personnel which provide direct or indirect support to the individual. This type connection will not have portal access when connected as any type Team Member

Contact Type and Relationships

What kinds of Connections Types are there?

- **6 – CDJFS Contact** – County Department of Jobs and Family Services. This type connection will not have portal access when connected as any type Team Member
- **6 – Friend** – A person with whom the individual supported has a mutual bond of concern and support. The individual and may provide insight or value to developing or supporting the plan or individual. This type connection will not have portal access when connected as any type Team Member
- **6 – Other Professional** – This may be a point of contact which provides services or materials to support an individual. This type connection will not have portal access when connected as any type Team Member
- **7 – SSA** – This connection will happen automatically by the system when an SSA is assigned to the individual. This type connection will not have portal access when connected as any type Team Member
- **8 – Individual** – This connection will be a ‘hidden’ connection and happens when the imagine record for the individual is created from IDS. The process of granting Portal access for the individual is done from the Front Page by adding an email address, and creating an invitation code from ‘More Commands’ (reflects on the ISP Agreement Tracker)

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Contacts, Connections and Team Members Check List

- ☐ Before you make a Connection and select a team member, double check to make sure that the person is a Contact in imagineIS
- ☐ After you confirm that they are a contact within imagineIS, select the Individual you are working with and choose the Connections tile. Confirm The expected person is a connection
- ☐ If the person is listed as a connection, double check the type of connection. Confirm that it is correct

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Adding a Provider

- [ ] Confirm that the Provider has been added to ***imagineIS*** by the Finance Manager
  - If your using “Look Up” – make sure that the field your searching in is Provider

- [ ] Confirm that the provider has services associated, and that the provider certification dates are still active

- [ ] Confirm that the provider has been added as a Team Member to the individual you are working with

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Helpful Notes

- When connected correctly as Assigned Team Member and Contact Type= Providers the Provider (agency/independent) will be displayed on the ISP Agreement Tracker
- When connected correctly as Assigned Team Member and Contact Type= Guardian the Guardian will be displayed on the ISP Agreement Tracker
- Only Assigned Team Member and type Provider, Guardian and hidden contact type Individual display on ISP and agree to ISP

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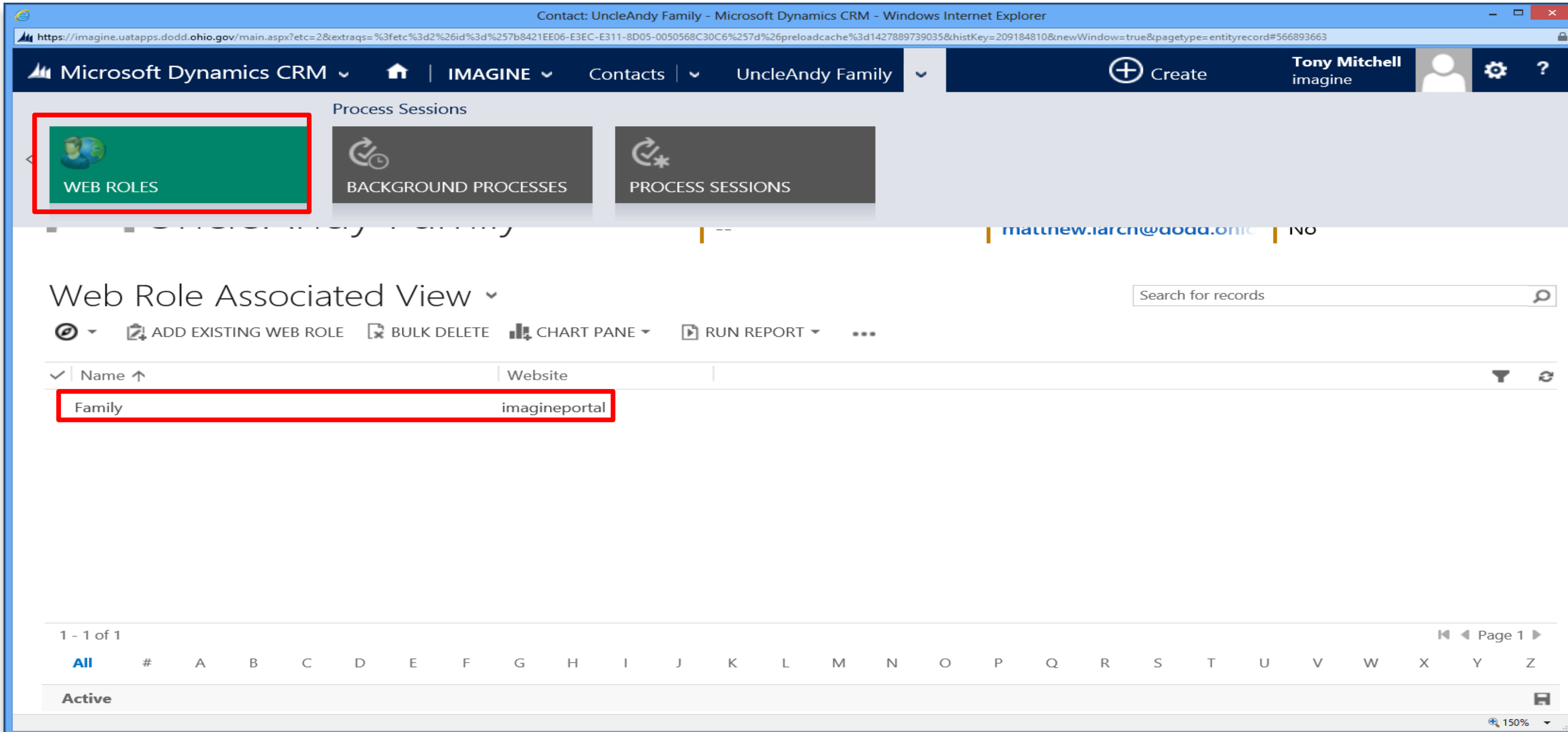
Portal Viewing



If a Portal Contact has more than one connection type, Example – Guardian and Parent, even if they are working with more than one individual. Make sure that they only have one Web Role listed. If you make a duplicate entry a second Web Role will be created.

This will cause the Portal to not display for them.

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Outcome and Service Dates

- [ ] Double check the Funding Allocation Start and End date
- [ ] Double check the Services Start and End date
- [ ] Double check the Provider Certification End date
- [ ] Double Check the Outcome End date and the Action Plan End date

Confirm that the dates are in alignment and the end dates are not shorter than the Outcome you are working with.

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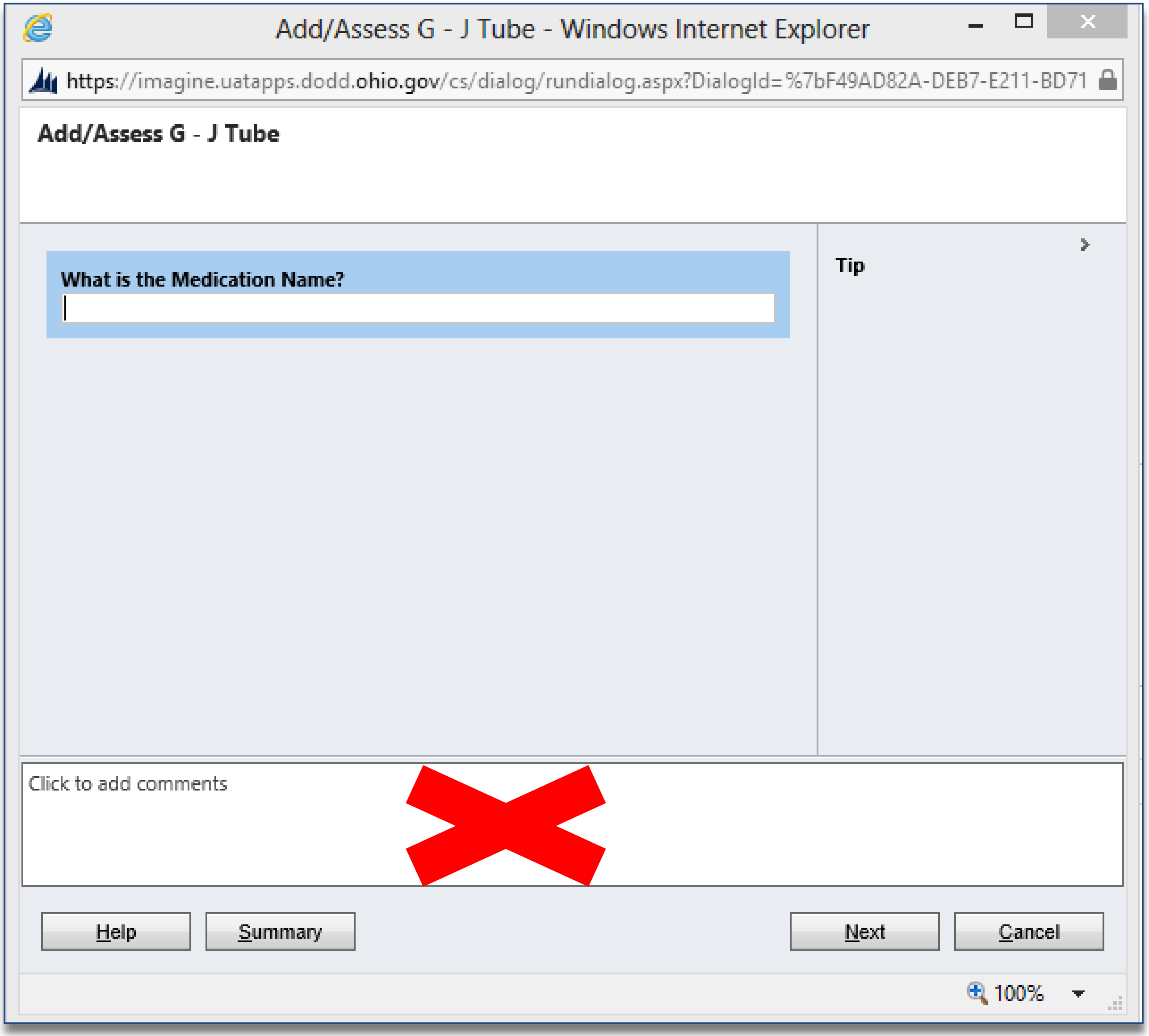
Essential Health Comment Field



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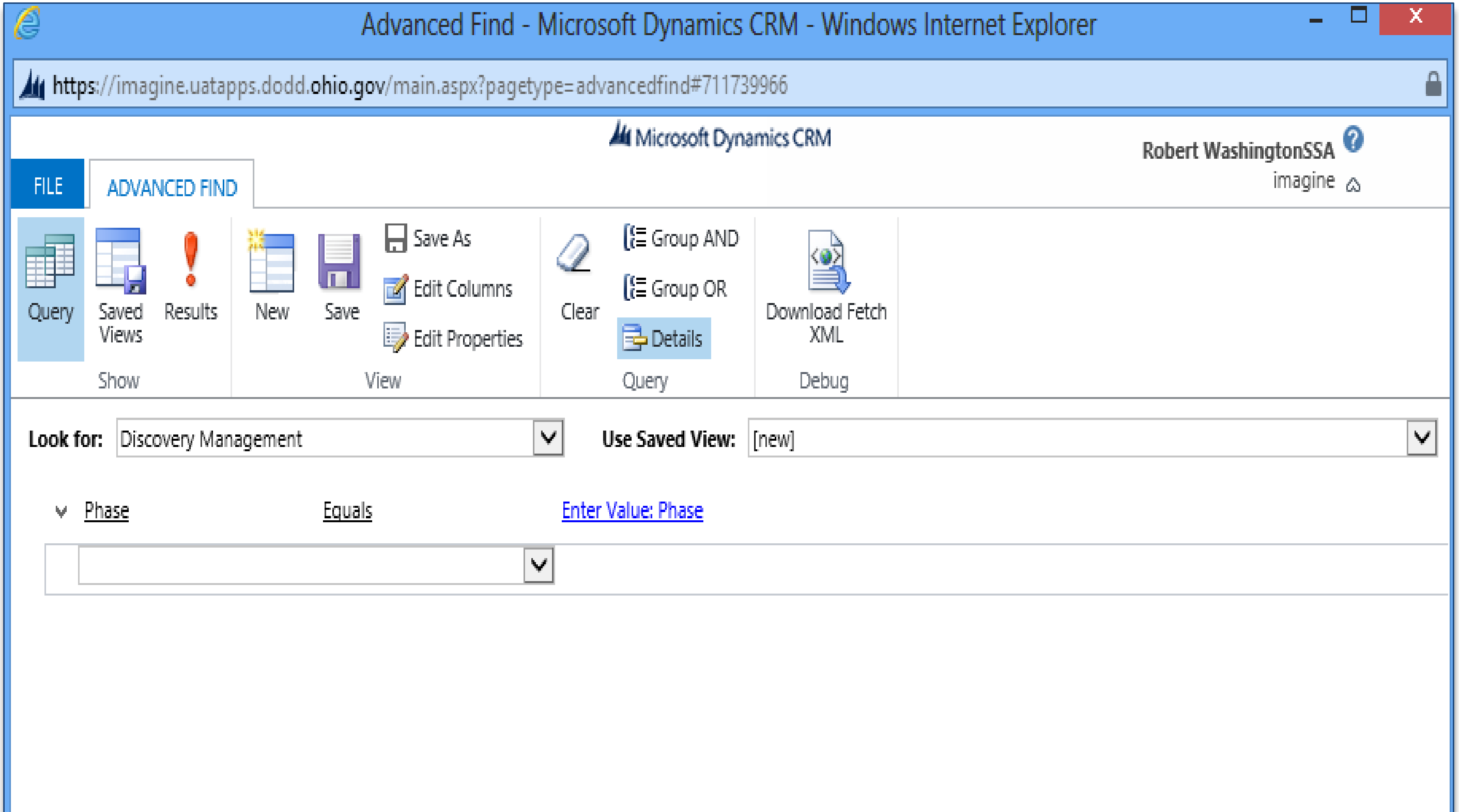
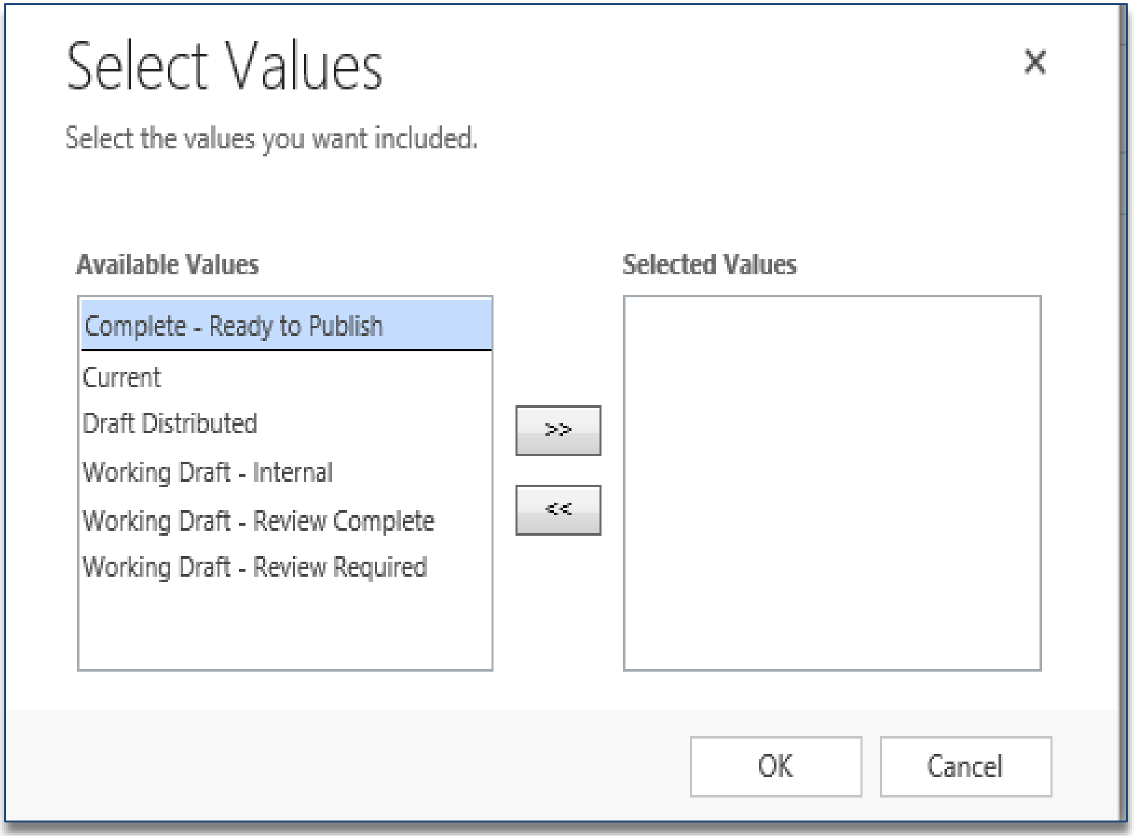
Advanced Find – Discovery Management



Advanced Find - Discovery Management



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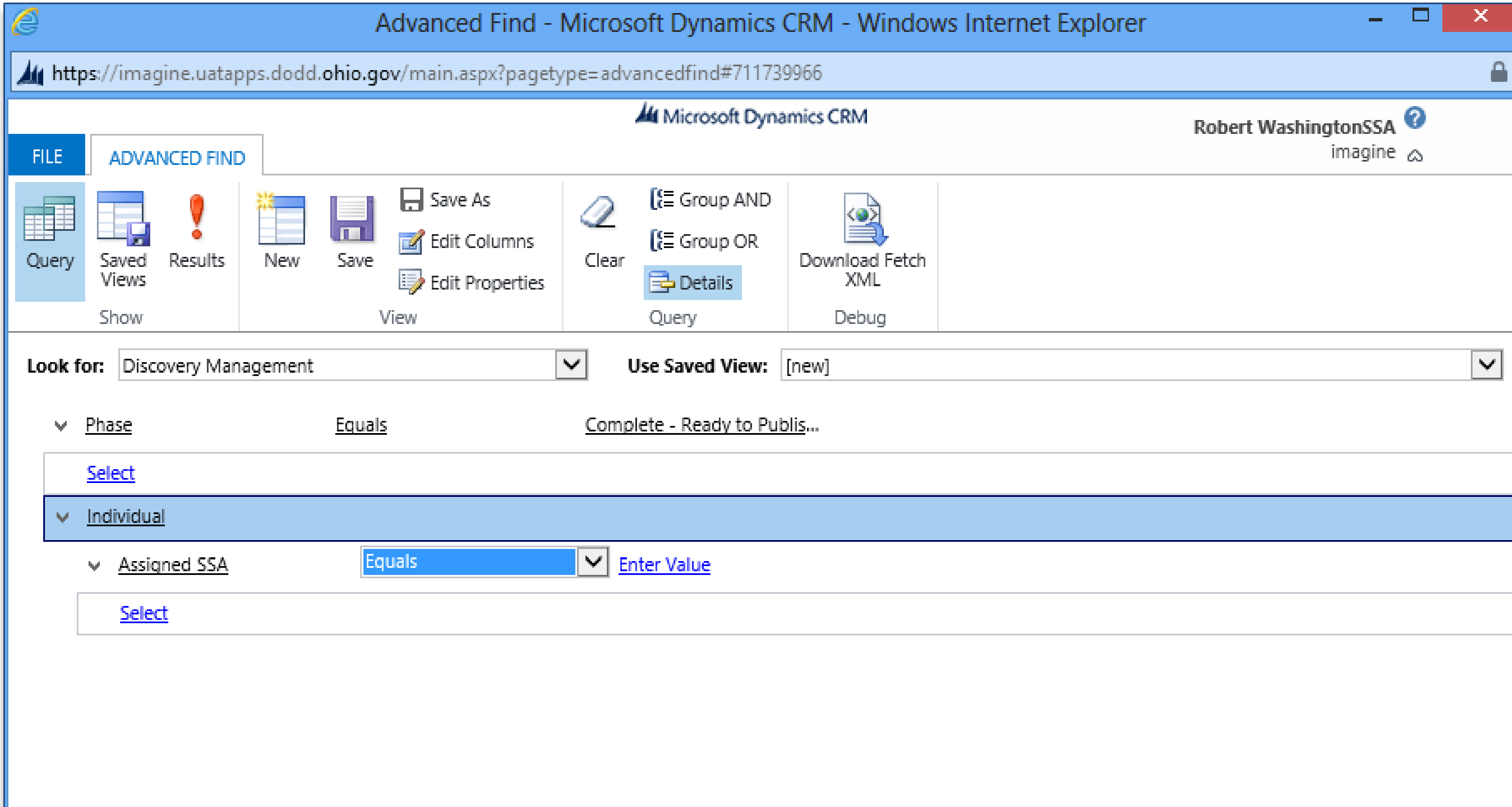
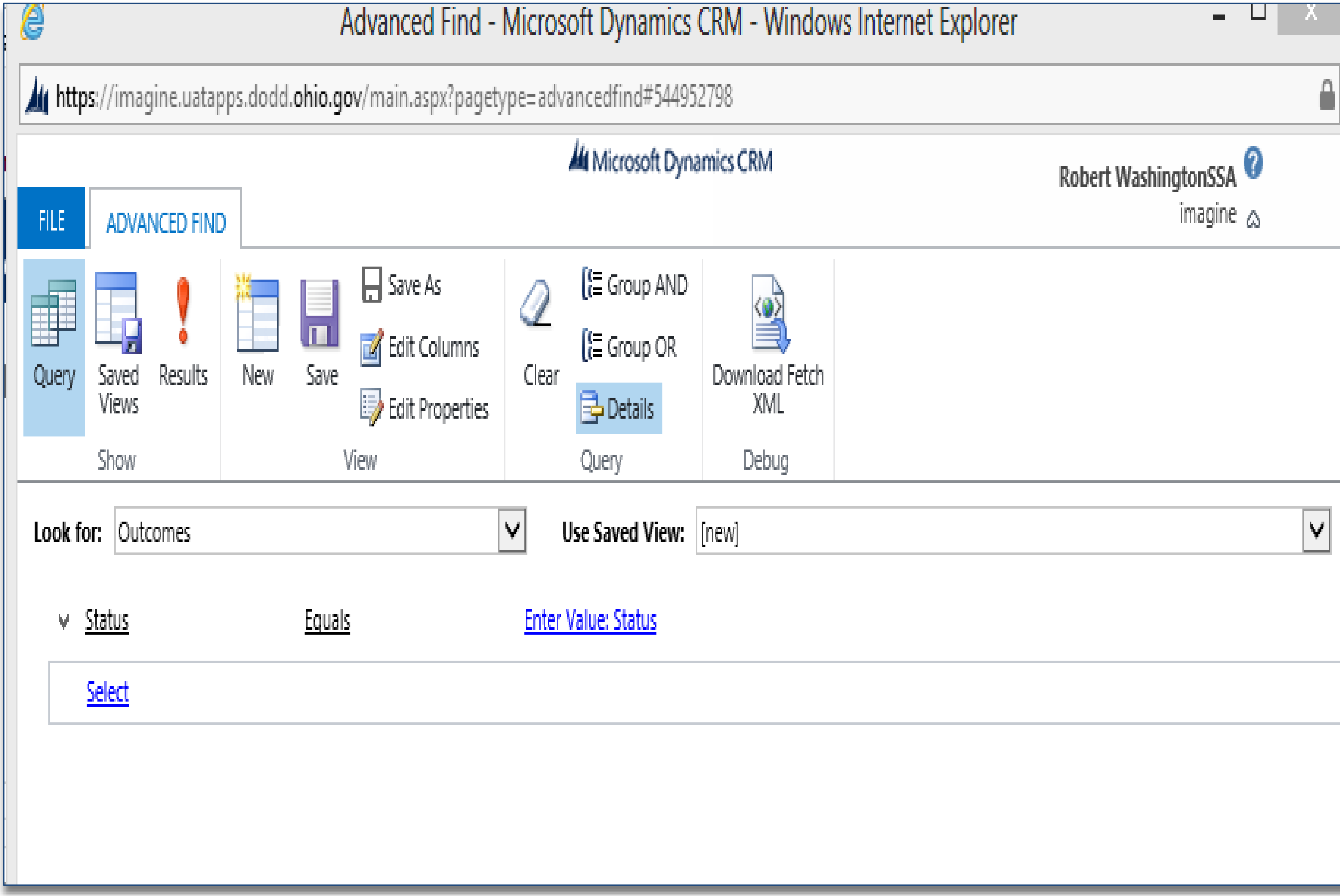


Advanced Find – Outcomes Status



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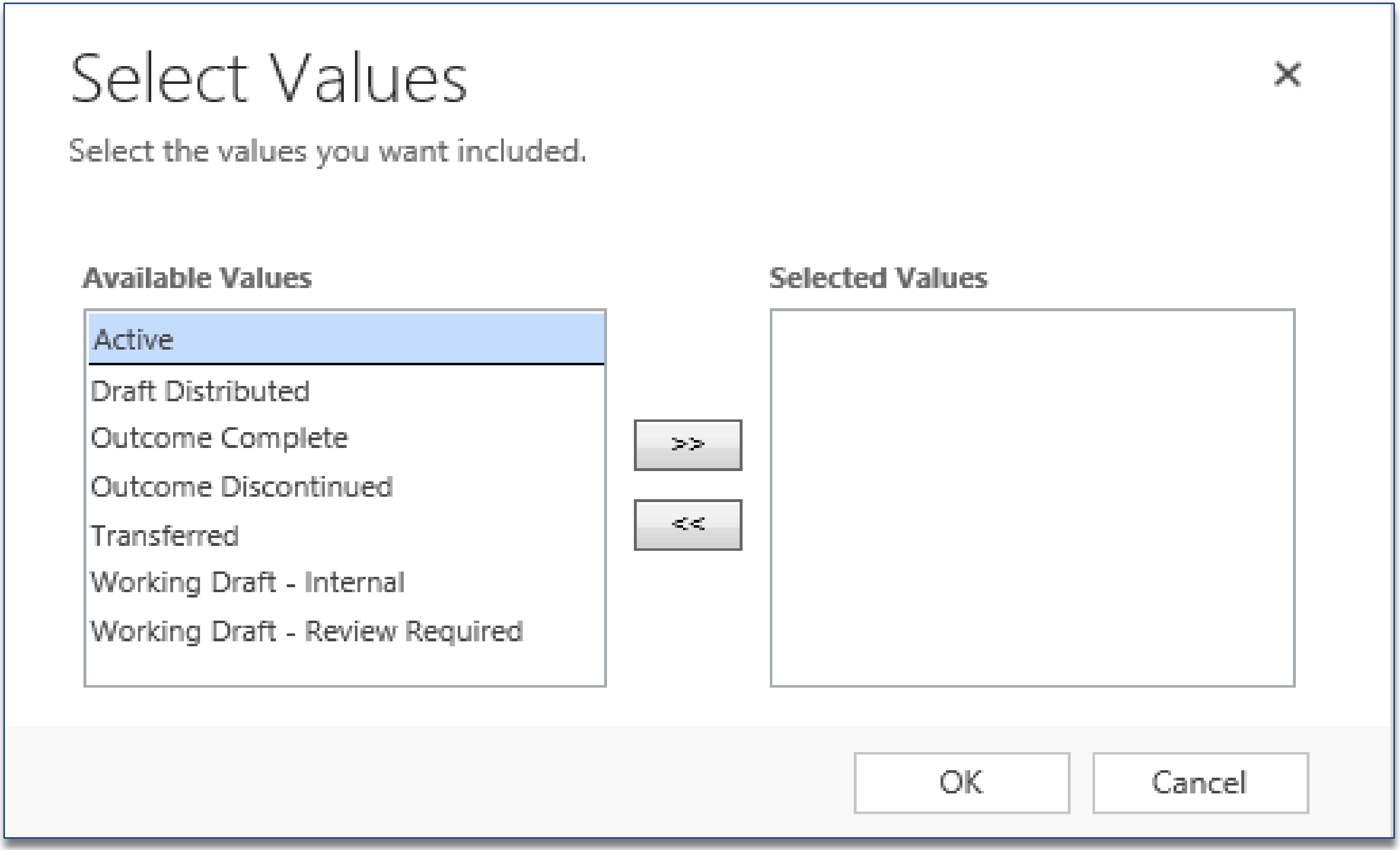

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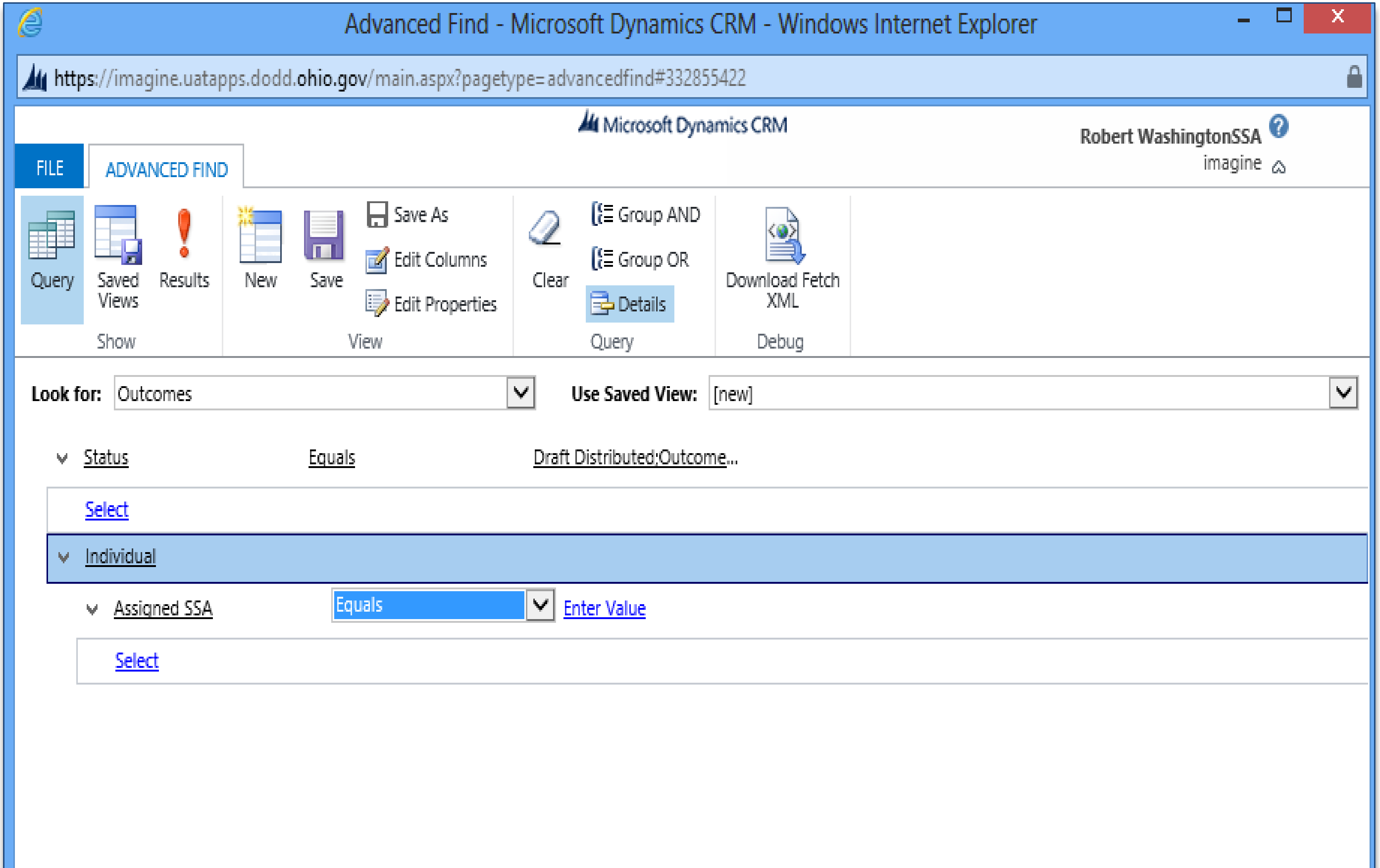

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Questions ?????