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# Advanced User Reference

July 09, 2015

DODD

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# Overview

## Description

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

## Who should attend?

Anyone designated as a Super User in the imaginelS application.

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# Register New Associated (County Board Worker)

FY2016-2017 Budget [Learn more about DODD's proposed budget for the next biennium.](#)

## Welcome to the Ohio Department of Developmental Disabilities

(Updated: March 23, 2015) [IMPORTANT NOTICE FOR MEDICAID PROVIDERS](#)



### My DODD

Learn about what services and supports you can use to help reach your goals.



### Individuals & Families

Learn about available services and supports. Get tips on accessing and navigating Ohio's DD system.



### County Boards

Learn about resources to help to ensure quality care, training opportunities, and credentialing and accreditation.



### Providers

Learn how to become a provider in Ohio's DD system, and how to maintain your certification.

# 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

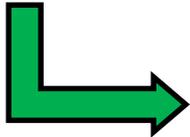
Please allow 5 - 10 minutes to complete our registration request process.

**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**

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**NEW USER ACCOUNT REGISTRATION**

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

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**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:**

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Enter the above code here:

Unable to read the code?  
[Click here to generate a new one.](#)

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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 Contact Types 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 of 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 of 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 ALL providers (independent/Agency/etc) which provide a service to the individual 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 ***imaginelS*** 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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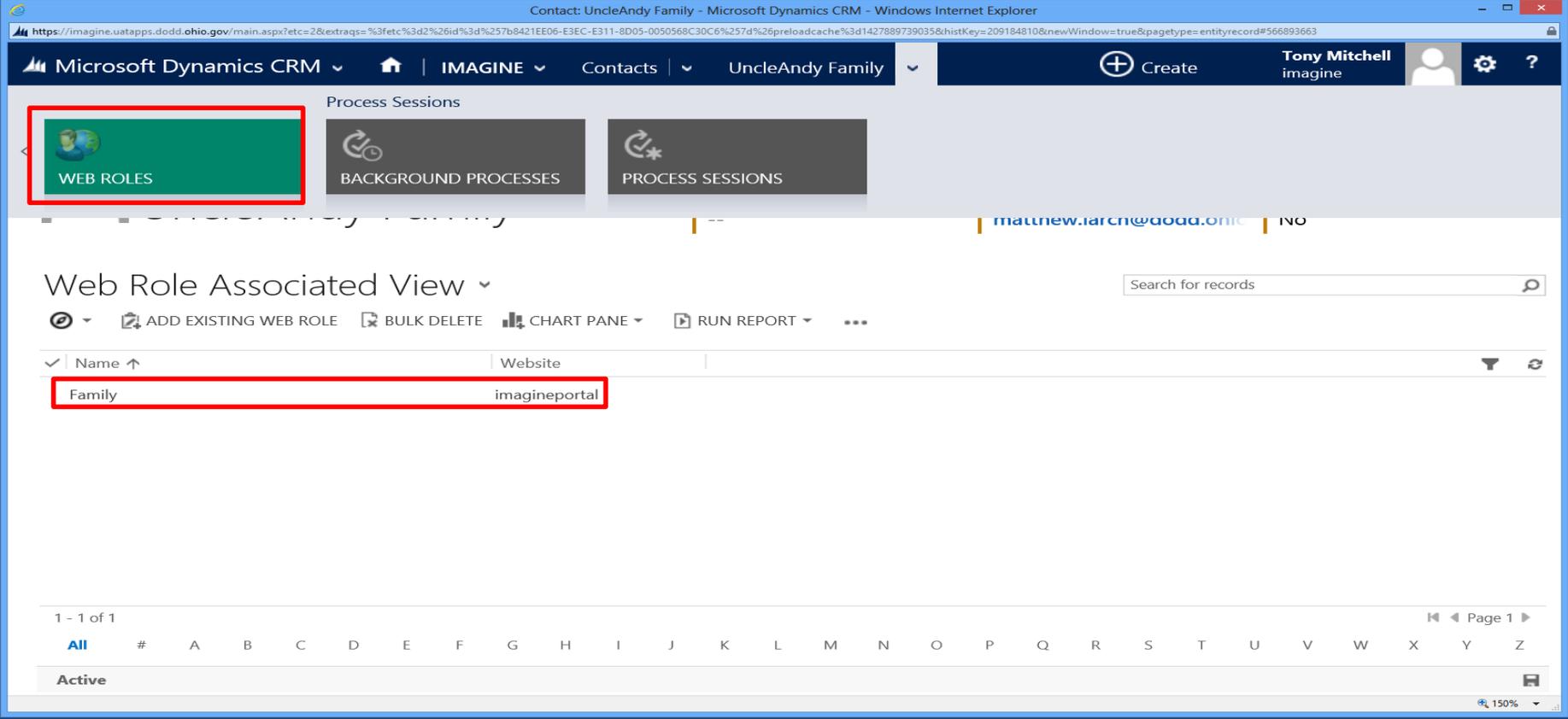
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# Portal Viewing



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

The screenshot shows a web browser window titled "Add/Assess G - J Tube - Windows Internet Explorer". The address bar contains the URL: <https://imagine.uatapps.dodd.ohio.gov/cs/dialog/rundialog.aspx?DialogId=%7bF49AD82A-DEB7-E211-BD71>. The page title is "Add/Assess G - J Tube".

The main content area is divided into two sections. On the left, there is a form with a label "What is the Medication Name?" and an empty text input field. On the right, there is a "Tip" section with a right-pointing arrow.

At the bottom of the form, there is a large white text area with the text "Click to add comments". A large red "X" is superimposed over this area, indicating that the comment field is not functional or is being highlighted as a problem.

At the bottom of the browser window, there are several buttons: "Help", "Summary", "Next", and "Cancel". The zoom level is set to 100%.

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# Advanced Find – Discovery Management

Advanced Find - Microsoft Dynamics CRM - Windows Internet Explorer

https://imagine.uatapps.dodd.ohio.gov/main.aspx?pagetype=advancedfind#711739966

Microsoft Dynamics CRM

Robert WashingtonSSA ?  
imagine

FILE ADVANCED FIND

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML

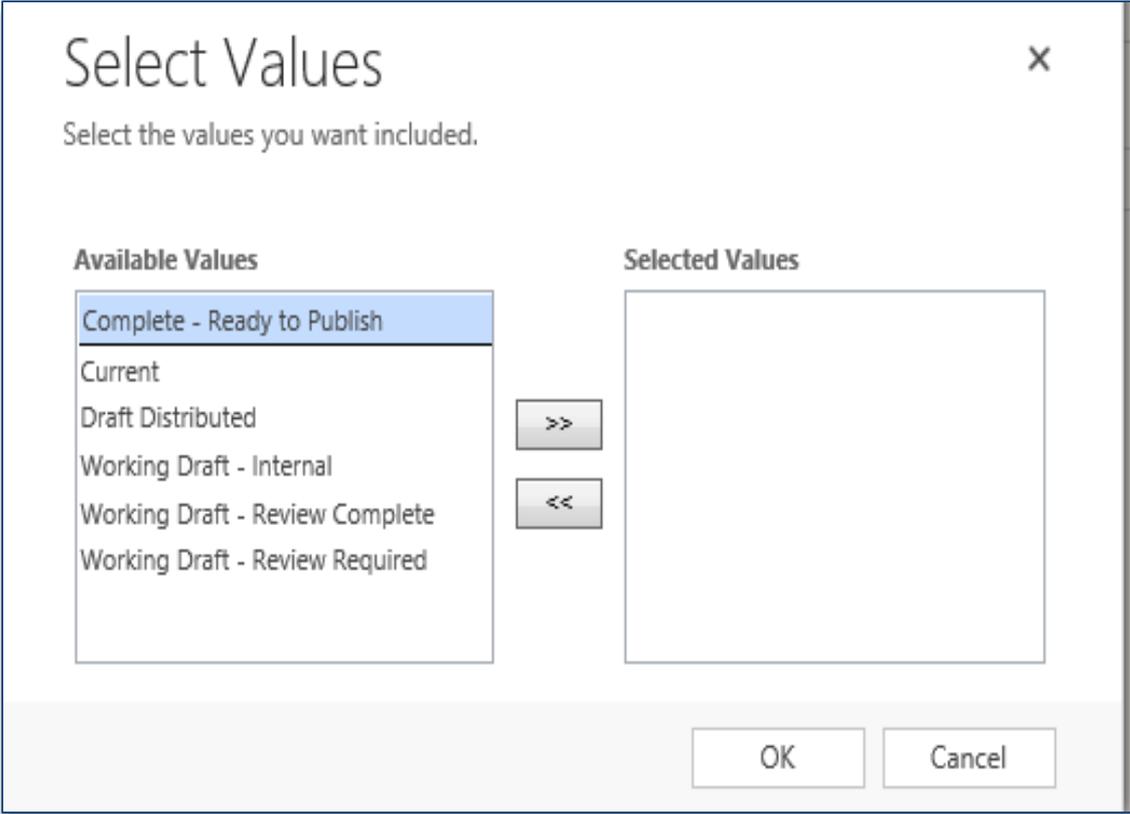
Show View Query Debug

Look for: Discovery Management Use Saved View: [new]

Phase Equals Enter Value: Phase

[ ]

# Advanced Find - Discovery Management



# Advanced Find – Discovery Management

The screenshot shows the Microsoft Dynamics CRM Advanced Find interface. At the top, the browser title is "Advanced Find - Microsoft Dynamics CRM - Windows Internet Explorer" and the address bar shows the URL "https://imagine.uatapps.dodd.ohio.gov/main.aspx?pagetype=advancedfind#711739966". The user is identified as "Robert WashingtonSSA" with the name "imagine" below it.

The interface features a ribbon with the "ADVANCED FIND" tab selected. The ribbon includes the following groups and items:

- Query**: Query, Saved Views, Results, New, Save, Save As, Edit Columns, Edit Properties, Clear, Group AND, Group OR, Details, Download Fetch XML, Debug.

The search criteria are defined as follows:

- Look for:** Discovery Management
- Use Saved View:** [new]
- Phase**: Equals Complete - Ready to Publis...
  - Select
- Individual** (highlighted)
  - Assigned SSA**: Equals [dropdown menu] Enter Value
    - Select

# Advanced Find – Outcomes Status

The screenshot shows a web browser window titled "Advanced Find - Microsoft Dynamics CRM - Windows Internet Explorer". The address bar contains the URL: <https://imagine.uatapps.dodd.ohio.gov/main.aspx?pagetype=advancedfind#544952798>. The page header includes the Microsoft Dynamics CRM logo and the user name "Robert WashingtonSSA" with a help icon and the text "imagine".

The interface features a ribbon with the following sections:

- FILE** (highlighted)
- ADVANCED FIND**

The ribbon contains the following groups of icons:

- Show**: Query, Saved Views, Results (with a red exclamation mark icon).
- View**: New, Save, Save As, Edit Columns, Edit Properties.
- Query**: Clear, Group AND, Group OR, Details (highlighted).
- Debug**: Download Fetch XML.

Below the ribbon, there are two dropdown menus:

- Look for:** Outcomes
- Use Saved View:** [new]

Below the dropdowns, there is a section for filtering:

- Status** (with a dropdown arrow)
- Equals**
- [Enter Value: Status](#)

At the bottom, there is a text input field containing the word [Select](#).

# Advanced Find – Outcomes Status

## Select Values ✕

Select the values you want included.

| Available Values                |    | Selected Values |
|---------------------------------|----|-----------------|
| Active                          | >> |                 |
| Draft Distributed               |    |                 |
| Outcome Complete                | << |                 |
| Outcome Discontinued            |    |                 |
| Transferred                     |    |                 |
| Working Draft - Internal        |    |                 |
| Working Draft - Review Required |    |                 |

OK      Cancel

# Advanced Find – Outcomes Status

The screenshot shows the Microsoft Dynamics CRM Advanced Find interface in a browser window. The browser title is "Advanced Find - Microsoft Dynamics CRM - Windows Internet Explorer" and the address bar shows the URL "https://imagine.uatapps.dodd.ohio.gov/main.aspx?pagetype=advancedfind#332855422". The user is identified as "Robert WashingtonSSA" with the role "imagine".

The interface includes a ribbon with the "ADVANCED FIND" tab selected. The ribbon contains several groups of actions: "Query" (Query, Saved Views, Results), "New" (New, Save, Save As, Edit Columns, Edit Properties), "Clear" (Clear), "Group AND/OR" (Group AND, Group OR, Details), and "Download Fetch XML" (Download Fetch XML, Debug).

Below the ribbon, the search criteria are defined:

- Look for:** Outcomes
- Use Saved View:** [new]
- Status:** Equals Draft Distributed:Outcome...
- Individual:** (highlighted)
- Assigned SSA:** Equals Enter Value

Each criterion has a "Select" link below it.

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Questions ?????.?