



Department of
Developmental Disabilities

John R. Kasich, Governor

John L. Martin, Director

DODD ITS Partner Enrichment 2016

Division of Information Technology Services (ITS)

Michelle Burk – Deputy Director/CIO

9/21/2016





Introduction

Logistics

- **Restrooms**
- **Cafeteria**
- **Support Questions Box**
- **Gifts**
- **Silence your mobile devices**

Information Technology Services



Information Technology Services



Agenda



8:45 – 9:00 AM	Welcome
9:00 – 9:15 AM	Director John Martin
9:15 – 9:30 AM	DODD ITS General Updates – Michelle Burk, Deputy Director/CIO
9:30 – 9:50 AM	Microsoft Dynamics CRM Platform
9:50 – 10:15 AM	Level of Care/Ohio Benefits
10:15 – 10:30 AM	Break
10:30 – 12:00 PM	imaginelS
12:00 – 1:00 PM	Lunch
1:00 – 1:40 PM	Secure Entitlement Management System
1:40 – 2:25 PM	Upcoming DODD ITS Initiatives
2:25 – 2:40 PM	Break
2:40 – 3:10 PM	Review Data System/Restrictive Measures Notification
3:10 – 3:25 PM	State of Ohio Resources
3:25 – 3:30 PM	Wrap-up

Director John Martin

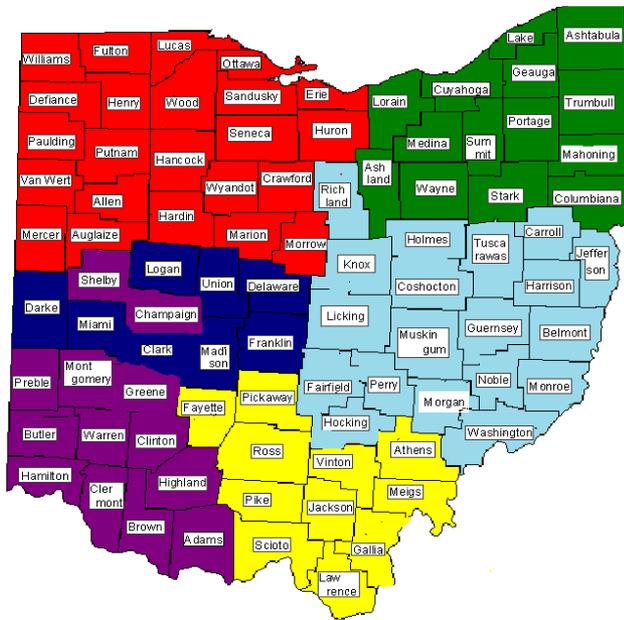
Mission

- **The continuous improvement of the quality of life for Ohio's citizens with developmental disabilities and their families**

Vision

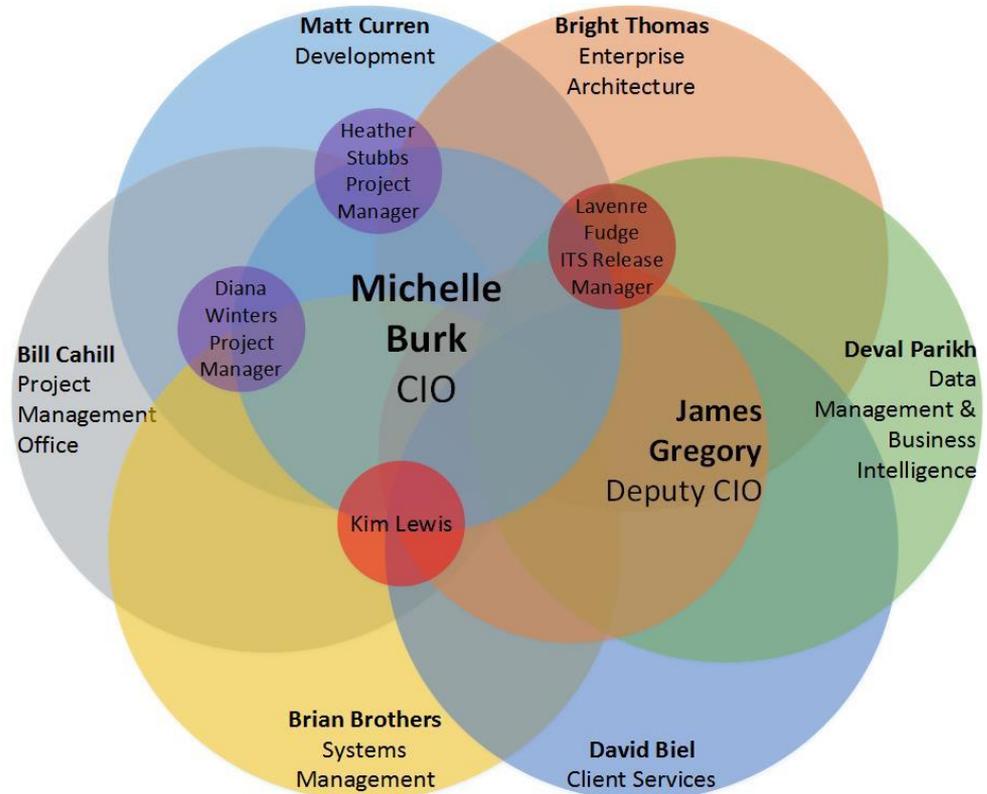
- **Ohio's citizens with developmental disabilities and their families will experience lifestyles that provide opportunities for personal security, physical and emotional well-being, full community participation, productivity, and equal rights.**





- **95,965 Individuals served including 36,621 waivers**
- **88 County Boards with 3000+ staff across 6 regions**
- **8 Councils of Government with 250+ staff**
- **10 Developmental Centers**
- **\$2.2+ Billion Medicaid Benefits Managed**

ITS Leadership



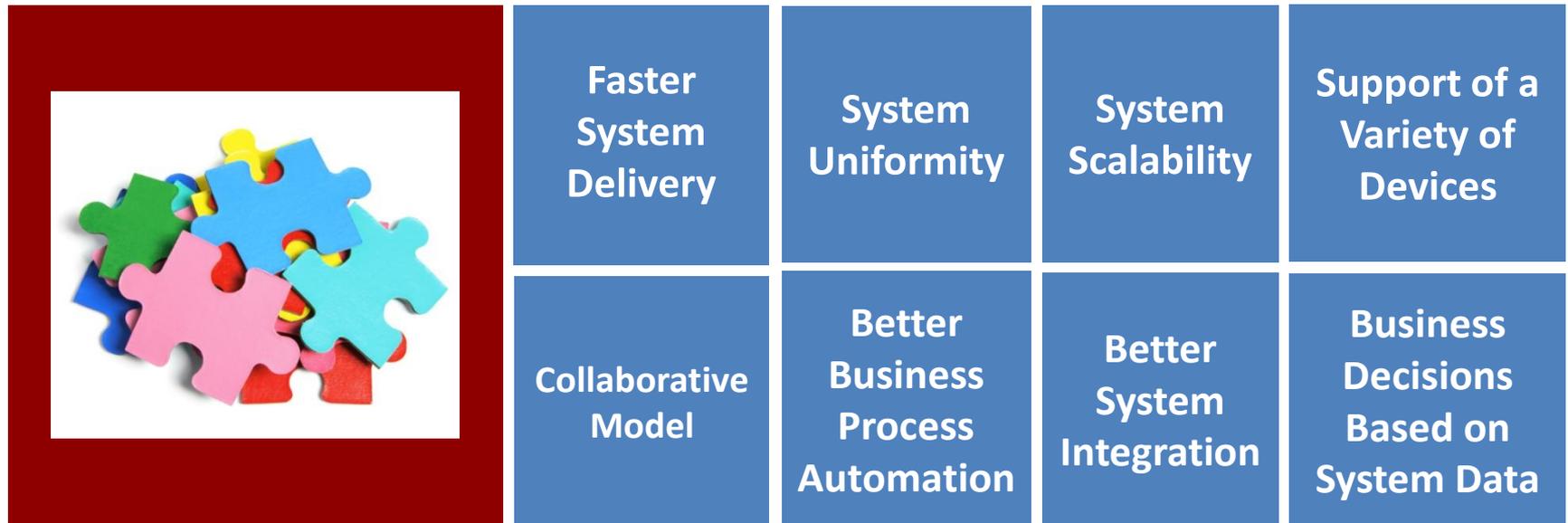
ITS Call Center

Phone: 1-800-617-6733 Option 4

Email: ITSCallCenter@dodd.ohio.gov

Customer Relationship Management (CRM) Drivers

There is a need for:



Dynamics CRM

Rapid Application Development	Common UI and More Components	Predictive Scalability Path	Out of the Box Support for Mobile and Social Media
Collaborative Model	Out of the Box Extendable Workflow Engine	Out of the Box Support for Many Integrations	Out of the Box Support for Reports and Dashboards



Dynamics CRM

Current DODD Environment Requirements

Platform	OS	Supported browsers
Windows	10	Edge
	8.1 (x86)	IE 11, Firefox (latest), Chrome (latest)
	8.1 (x64)	IE 11
	7	IE 10, IE 11, Firefox (latest) , Chrome (latest)
Apple	Mac OS X 10.10	Safari (latest)
	Mac OS X 10.9	Safari (latest)
	Mac OS X 10.8	Safari (latest)
	Apple iPad	Safari (latest)



Dynamics CRM

Current DODD Environment OS/Browser Testing

Application and Feature								
imaginelS								
Browsers	Chrome	Safari	Firefox	IE 8	IE 9	IE 10	IE 11	Edge
Add Documents (Pinning)	?	NT	NT	NT	NT	NT	?	NT
Print ISP's (Must Open in Adobe Reader)	√	√	NT	NT	NT	NT	√	NT
County Board Approve Security Requests	X**	NT	NT	NT	NT	NT	√	NT
Page View	√	√ *	NT	NT	NT	NT	√	NT
All Features viewable and available	√	√	NT	NT	NT	NT	√	NT
Imagine Tiles Viewable and Functional	√	√	NT	NT	NT	NT	√	NT
Printing	√ *	√ *						
Operating Systems	Windows XP	Windows 7	Windows 8 s 8.1 Pro	Window Windows 10	OS X 10.9	OS X 10.10	OS X 10.10	IOS 9.3.5
Page Views	NT	NT	√	√	√	NT	NT	√
Functionally	NT	NT	√	√	√	NT	NT	√
Imagine Tiles Viewable and Functional	NT	NT	√	√	√	NT	NT	√ *
Printing								√ *

Dynamics CRM

Current DODD Device Testing

imaginelS									
Devices	Chrome Book	Android Laptop	Surface	Desktop PC	Laptop	IPhone	Android Phone	Acer Tablet	IPad
Full Page View	NT	NT	✓	✓	✓	NT	NT	NT	I*
All Features viewable and available	NT	NT	✓	✓	✓	NT	NT	NT	✓
Processing and Refresh Speed	NT	NT	✓	✓	✓	NT	NT	NT	✓
Imagine Tiles Viewable and Functional	NT	NT	✓	✓	✓	NT	NT	NT	✓
Printing									✓*
Bench Marks Speed/Refresh	3G Devices	4G Devices							

Waiver/ICF LOC Assessment Drivers



No
Standardized
Assessor
Training

Hard to
Share LOC
Information

No
Electronic
Storage of
Documents

Poor
Collaboration

No Standardized Ability to Assess Waiver/ICF

Level of Care (LOC) Solution

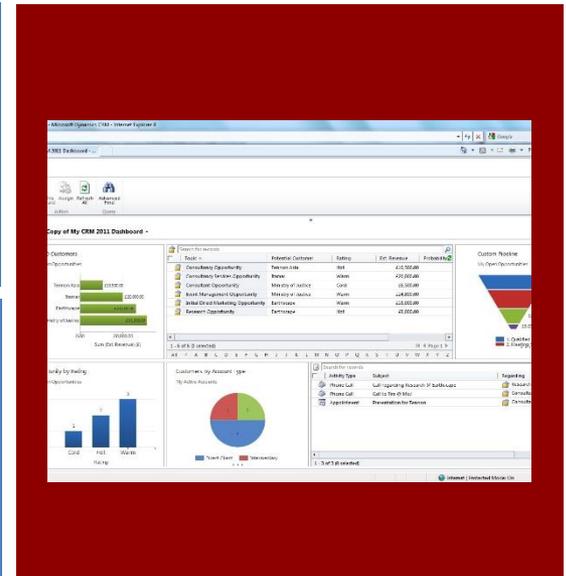
Implemented
in 5 Months- 3
Development
Tracks

Production Deployment
took Three 20 Hour Days

Implemented
in all 88
Counties

Dashboards/Information
to Help Manage Business
Flow

Automated LOC Assessment
that Allows for Eligibility
Determinations for Medicaid
and County Services



LOC – Business Testimonial

“Our previous process for level of care consisted of different level of care assessments and two separate process rules with no standardized training for evaluators often leading to inconsistent ratings, confusion, and complications for the individual.

...LOC is a single assessment tool and process that is person centered aligning more closely with county board eligibility that incorporates the core data set for the Balancing Incentives Program.

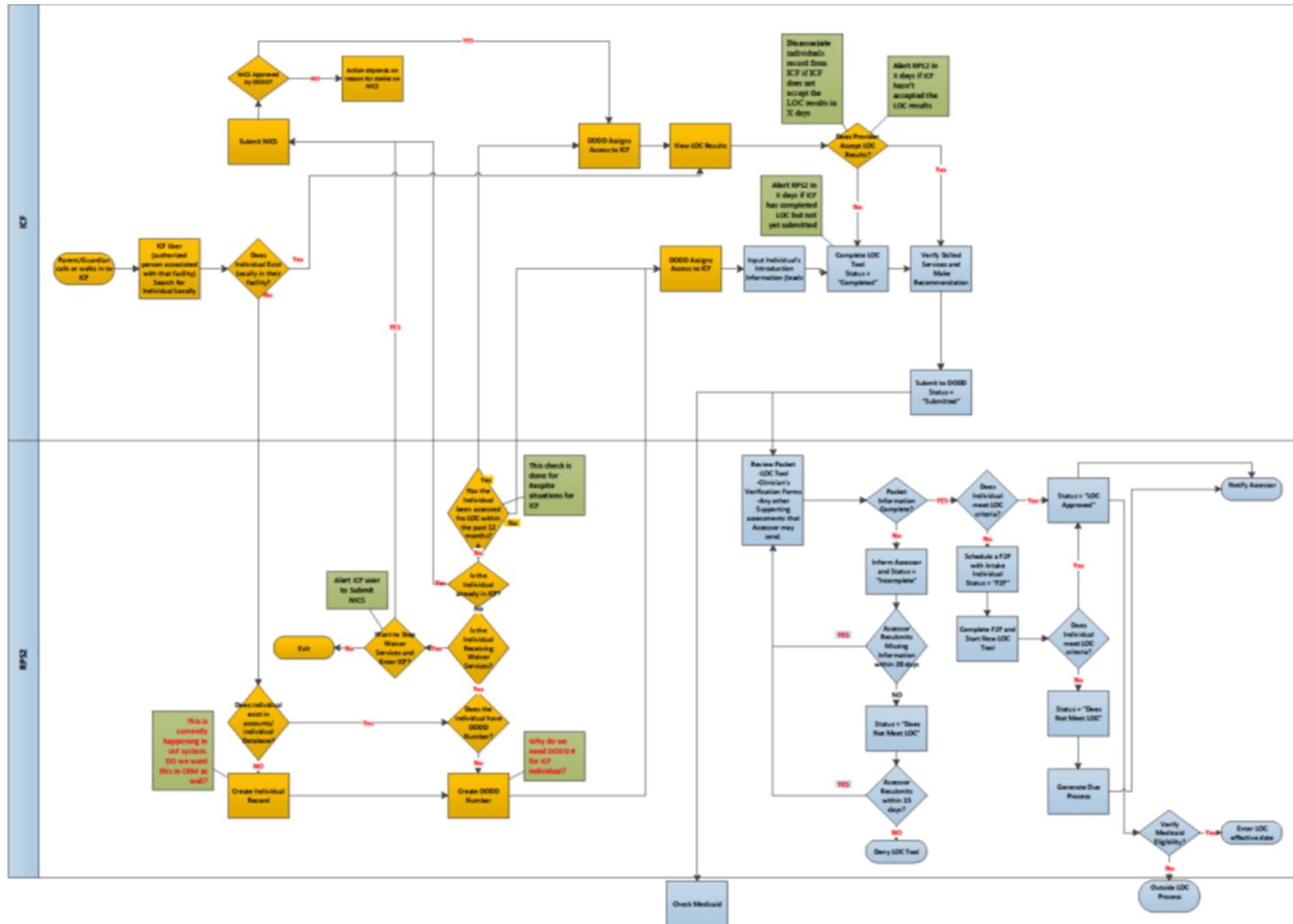
...The LOC system promotes better cooperation and communication between DODD, County Boards, and DCs/ICFs.

...It is paperless, transparent, and works in real-time.”

Matt Turner

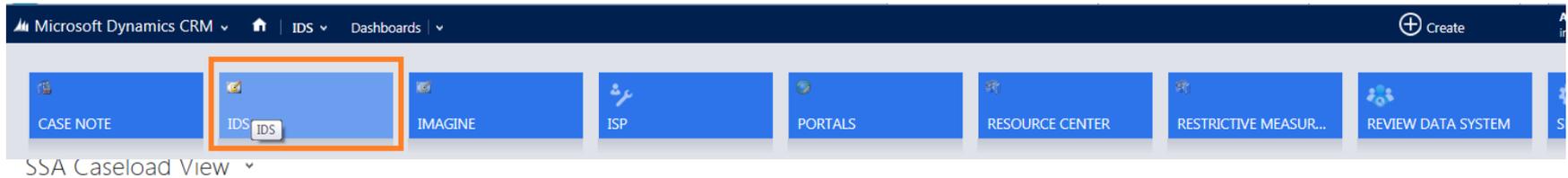
Medicaid Development and Administration, DODD

LOC Process – Waiver and ICF



LOC – Let's Take a Look

Log into IDS/LOC



Navigate to Individual

Choose the individual that needs to work.

1. Navigate to Eligibility Management



LOC— Let's Take a Look

2. Create New Eligibility Management

INDIVIDUAL : INFORMATION
New Demo Individual Date of Birth: 9/12/2016

Eligibility Management Associate...
+ Add New Eligibility MA | Add Existing Eligibility... | Bulk Delete | Chart Pane | Run Report | Export Eligibility Man...

LOC Management	Loc Reason	Request Type	Waiver Type	LOC Determination Status	Submitted Date (...)	Resubmit Date	Reviewed (Deter...	LOC Status Chan...	LOC Effective St...	LOC Effective En...	Created By
Eligibility Management -- (New Demo Individual) (9...	County Board...	Initial			9/12/2016 11:...		9/12/2016 11:...				

ELIGIBILITY MANAGEMENT : INFORMATION
Eligibility Management -- (New Demo Individual)...

Initial | **LOC** | CB Decision Tree (Active)

Eligibility Info Entered	No
GTKYV Scheduled	No
GTKYV Information En...	No

Eligibility Info

Assessment Reason *	County Board Eligibility	Assigned Eligibility Specialist *	
Request Type *	Initial		
Assessment Date (Scheduled/Rescl) *	9/12/2016		
LOC Status	Completed		
Best way to communicate(Preferred)	--		

Location for Initial Vi	--	Age for Assessment	16
Location Address	--		
Date of Visit *	9/12/2016	County Proposed Eff	--
LOC Effective Start D	--	LOC Effective End D	--

LOC– Let’s Take a Look

3. For ages 10 and above with opt-in, the county will need to submit the LOC. Upon completion of the LOC, the CB decision tree will be created.

🔍 SAVE COMPLETE SAVE & CLOSE DEACTIVATE DELETE HOSK'S GUID GETTER ...

LOC : INFORMATION ▾

New Demo Individual-LOC1016522



General

LOC Type	<input type="text" value="Initial"/>	Assigned Evaluator	<input type="text" value=""/>
Assessment Reason	<input type="text" value="County Board Eligibility"/>		
LOC Status	<input type="text" value="Saved"/>		
Waiver Type	<input type="text" value="--"/>		
County Proposed Eff	<input type="text" value="--"/>		
Date of Assessment	<input type="text" value="9/12/2016"/>		
County	<input type="text" value="BELM"/>		

Document(s) Review:

Message from webpage

All fields on LOC will be Read Only after Complete.
Proceed to set to complete?

LOC– Let’s Take a Look

4. CB Decision Tree answer values will automatically be updated from the completed LOC.

CB DECISION TREE : INFORMATION

New Demo Individual (9/12/2016 11:22 AM) -- CB...



Date of Determination **9/12/2016**
Determined By [Redacted]
Assessment Reason **County Board Eligibility**
Individual **New Demo Individual**

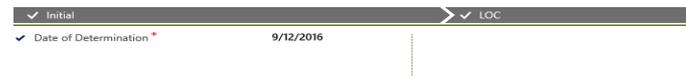
LOC Total Score [Redacted]
6 Substantial Functional Limitation areas were identified
Is LOC Eligible **Y**
Total Score **95**

← For ages 10 and above - CB Eligibility(OPT-IN)

- 1. Does the individual have a diagnosed severe, chronic disability?
 Y
- 2. Is the diagnosed disability attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?
 Y
- 3. Was the diagnosed disability manifested before the age of 22?
 Y
- 4. Is the diagnosed disability likely to continue indefinitely?
 Y
- 5. The disability results in substantial functional limitations in at least three of the following areas:
 Y
Self-Care
 Y
Expressive/receptive communication
 Y
Learning
 N
Mobility
 Y
Self-direction
 Y
Capacity for independent living
 Y
Economic self-sufficiency (N/A for individuals below 16)
 Y

CB DECISION TREE : INFORMATION

New Demo Individual (9/12/2016 11:22 AM) -- (



- 3. Was the diagnosed disability manifested before the age of 22?
 Y
- 4. Is the diagnosed disability likely to continue indefinitely?
 Y
- 5. The disability results in substantial functional limitations in at least three of the following areas:
 Y
Self-Care
 Y
Expressive/receptive communication
 Y
Learning
 N
Mobility
 Y
Self-direction
 Y
Capacity for independent living
 Y
Economic self-sufficiency (N/A for individuals below 16)
 Y
The individual is eligible for county board services if YES to items 1 - 5.
 Y

← Documents

LOC– Let’s Take a Look

5. Upon saving the CB decision tree, it will create Eligibility notice tracking which will generate the Eligibility/Ineligibility letters to the Individual.

ELIGIBILITY NOTICE TRACKING : INFORMATION

New Demo Individual(9/12/2016 11:22 AM) -- Eligi...

Individual | LOC # | Age for Assessment
New Demo | LOC101652 | 16



Date Notification Sent: [click to enter](#)

Documentation of Eligibility / Ineligibility Notice

Type of Notification: Eligible
Date Notification Sent: --
To whom it was sent: New Demo Individual
Assigned SSA: --
Deadline for first contact: --

ADDRESS

Street *
City *
State *
Postal Code *



CustomerGuide Contact Details

Name: --
Contact: --

Eligibility/Ineligibility Letter

Eligibility Letter - Age 6 and above

LOC– Let's Take a Look

6. Eligibility/Ineligibility letter that is created through Eligibility notice tracking

1 of 1 100% Find | Next

Eligibility Letter

9/12/2016

Dear New Demo Individual,

I want to let you know that it was a pleasure meeting you on 09/12/2016

As a representative of the [redacted] County Board of DD I'm pleased to inform you that you have been determined eligible for County Board Services. Determination was based on the Ohio Revised Code Section 5126.01, substantial functional limitation were found in at least three of the seven major areas.

A representative will be contacting you soon to coordinate services that you have requested.

Be thinking about what you would like us to know about you to help you achieve outcomes that are meaningful to you.

What do people like about you?
Who is important in your life?
What is important to you?
What is important for you to stay healthy and safe?
What do others need to know about you?

If you have any questions please contact us at

We are looking forward to support you in your life!

LOC– Let’s Take a Look

7. CB Decision tree for Individuals below 10 - Questions will load based on the individual’s age. The questions need answered and the decision tree set to complete.

CB DECISION TREE : INFORMATION
New CB Decision Tree

Initial CB Decision Tree (Active) Eligibility Notice Tracking

Age for
0

For ages birth through age two

1. Individual has a severe, chronic disability.
* Y

2. The disability is attributable to a mental or physical impairment or combination
* Y

3. The disability is likely to continue indefinitely.
* Y

4. The disability results in a delay or diagnosed condition with high probability of a
* Y
* test

5. The disability causes the individual to need a combination and sequence of spec
* Y

The individual is eligible for county board services if YES to items 1 - 5.

SAVE SAVE & CLOSE COMPLETE DEACTIVATE DELETE HOSK'S GUID GETTER

CB DECISION TREE : INFORMATION
newsp2 newsp2 (9/12/2016 11:57 AM) -- CB Decisi...

Initial CB Decision Tree (Active) Eligibility Notice Tracking

✓ Date of Determination 9/12/2016

Date of Determination 9/12/2016
Determined By Renuka Deavela
Assessment Reason County Board Eligibility
Individual newsp2 newsp2

Message from webpage
Proceed to set to complete?
OK Cancel

For ages birth through age two

1. Individual has a severe, chronic disability.
* Y

2. The disability is attributable to a mental or physical impairment or combination of mental and physical impairments, other than an impairment solely caused by mental illness.

LOC— Let's Take a Look

8. Upon completion, the Eligibility notice tracking record will be created.

🔍 SAVE SAVE & CLOSE DEACTIVATE DELETE HOSK'S GUID GETTER ASSIGN ...

ELIGIBILITY NOTICE TRACKING : INFORMATION

newsp2 newsp2 (9/12/2016 11:58 AM) -- Eligibility

Initial >

Date Notification Sent *click to enter*

Documentation of Eligibility / Ineligibility Notice

Type of Notification	🔒 Eligible
Date Notification Sent	--
To whom it was sent*	--
Assigned SSA	🔒 --
Deadline for first contact	--

CustomerGuide Contact Details

Name	--
Contact	() --

Eligibility/Ineligibility Letter

[Eligibility Letter - Age 0 to 5](#)

LOC – Recent Updates

• LOC Process Improvements (Waiver and ICFs)

- New status LOC prior approved for ICF LOCs.
- New County board eligible indicator to the individual's front page showing whether individual is deemed county board eligible
- All LOC questions were made mandatory to prevent data discrepancies.
- COGs now have access to NICS and LOC information.
- Increase the number of days on the LOC incomplete workflow before it turns does not meet status. (20 days).
- Include weightage of questions next to responses on the LOC assessment tool for 10 and above age group per the request from the SSA directors meeting on 10/28/15.
- Change of waiver, ICF/DOC two new request types added for LOC.
- Change of condition of allowed for Inactive, withdrawal and LOC Enrolled for waiver individuals and LOC approved for ICFs.
- Enhance Eligibility Management for handling SELF child and Adult scenarios.
- Multiple Redetermination has additional business validations.
- F2F enhancement for Central Office when individuals does not meet eligibility requirements.
- Attestation for 2399 removed from LOC attestations, per Ohio Benefits changes
- LOC Discharge status added for ICF individuals.
- SSA alerts revised for LOCs.
- LOC span history now available for ICFs and Waivers.
- Introducing the new reason codes in WMS -

• NICS Changes

- reason codes for Ohio Benefits
- Unlock Cost of Care Fields in CRM for TDD Waiver Type
- Prevent County Board user from being able to deactivate/activate, edit, and create an ICF
- NICS – Admission, discharge, Hospital/Jail, and Bed Hold day.
- NICS Process for ICF discharge modified to a two stage process: submitted and accepted stages.
- NICS bed Hold Enhancements for 30 days auto approved. Additional days goes through approval process.
- ICF/DC to Waiver scenarios will now waiver begin date as proposed effective date in NICS.
- When doing a NICS while somebody is on Waiver Suspension, do not allow a NICS for Bed Hold Days to be submitted.
- Audit history on the NICS and Facility
- NICS process changes to handle integration with the IAF system.
- Allow submission of NICS for Jail/Hospital when not attested.
- ICFs getting notified with 15 day alerts for when redets are about to expire.
- Alerts for Waiver County transfer NICS.
- County to County Transfer- NICS process enhances so that it can be initiated be either county.
- County boards are not able to enter in a withdraw NICS when a waiver is in a pending status.

• IDS Updates

- Provider Re-invitation process re-vamped and automated.
 - Front page – eligibility management record present indicator
 - ITR process enhancement
 - Search functionality in the dashboard, DODD Number, SSN , full name etc.
 - Associated counties design for sharing of individuals between counties.
 - Display only Active individuals on SSA/ SSA Director dashboard.
 - Uploading Documents user interface enhancements and fixes.
 - Update Facilities Tile to show all individuals in current facility.
 - Increase the number of days on the LOC incomplete workflow before it turns does not meet status. (20 days).
 - OTHER County: Introduction to Individual is failing for SSA OR CUSTOMER GUIDE, permissions issue fixed
 - Individual Address/ living arrangement fixes.
 - Change of Ownership for CB decision tree process.
 - SharePoint folders and creation issue fixed.
- ## • Central Office
- Ability for RPS 2 to modify a previously submitted Face to Face LOC.
 - Admin override on LOC dates during initial stage.
 - Span dates added to dashboard.
 - OA3 enhancements to dashboards.
 - LOC to be redirected to packet stage.
 - Reports for new admissions
 - Bug fixes

LOC – Waiver Nursing

THE OHIO DEPARTMENT OF DEVELOPMENTAL DISABILITIES
Medicaid Services System (MSS) - Manage Cost Projections

Welcome Praveen Pandi - MSS_Admin SUPPORT | PRINT
[Help Administration | Help?](#)

Home
 Create a New Site
 Search for Site by Site Name
 Search by Person
 Search for Site by Provider

PA
 Manage PA

PAWS
 Cap Rules
 Reports

CPT
 Manage Individuals
 Manage Providers
 Manage HPC Staffing Patterns
 Manage HPC Calendar
 Manage ADS/NMT Patterns
 Manage ADS/NMT Calendars
 Manage Nursing Patterns
 Manage Nursing Calendar
 Manage Unscheduled ADS/NMT
 Manage Unscheduled Services
 -For Multiple Individuals
 -For One Individual
 Manage Unscheduled Nursing Services

Manage Cost Projections

PA
 Manage Individual PA

SPA
 Service Payment Authorization
 Nursing Authorization

DRA

REPORTS

Manage: [Site Home](#) | [Edit Site](#) | [Manage Versions](#) | [Manage Notes](#) | [Add Non-Waiver Spans](#) | [Add DRA Exemption](#)

Select Span: 7/12/2016 - 7/11/2017 I/O

Waiver Span: 7/12/2016 - 7/11/2017 Waiver Type: I/O DDP Funding Level: 2 AAI Group: --

Waiver Cost Projection Details

Expand	Budget Type: DDP	Projected Cost: \$0.00	Budget Max: \$35,515.00	Remaining Amt: \$35,515.00
Expand	Budget Type: ADS	Projected Cost: \$0.00	Budget Max: --	Remaining Amt: \$0.00
Expand	Budget Type: NMT	Projected Cost: \$0.00	Budget Max: \$9,178.00	Remaining Amt: \$9,178.00

Nursing Cost Projection Details

Expand	Budget Type: Waiver Services	Projected Cost: \$3,618.68
Expand	Budget Type: State Plan Services	Projected Cost: \$130,754.68

LOC – Waiver Nursing

THE OHIO DEPARTMENT OF DEVELOPMENTAL DISABILITIES
Medicaid Services System (MSS) - Manage Cost Projections

Welcome Praveen Pandi - MSS_Admin SUPPORT | PRINT
[Help Administration](#) | [Help?](#)

Home
Create a New Site
Search for Site by Site Name
Search by Person
Search for Site by Provider

PA
Manage PA
PAWS
Cap Rules
Reports
CPT
Manage Individuals
Manage Providers
Manage HPC Staffing Patterns
Manage HPC Calendar
Manage ADS/NMT Patterns
Manage ADS/NMT Calendars
Manage Nursing Patterns
Manage Nursing Calendar
Manage Unscheduled ADS/NMT
Manage Unscheduled Services
-For Multiple Individuals
-For One Individual
Manage Unscheduled Nursing Services
Manage Cost Projections
PA
Manage Individual PA
SPA
Service Payment Authorization
Nursing Authorization
DRA
REPORTS

Site Name: [Redacted]
Manage: [Site Home](#) | [Edit Site](#) | [Manage Versions](#) | [Manage Notes](#) | [Add Non-Waiver Spans](#) | [Add DRA Exemption](#)
Select Span: 7/12/2016 - 7/11/2017 I/O
Waiver Span: 7/12/2016 - 7/11/2017 Waiver Type: IO DOP Funding Level: 2 AAI Group: --

Waiver Cost Projection Details

Expand	Services Finalization	00	Remaining Amt: \$35,515.00
Expand	Nursing Cost Projection Finalization Success.	--	Remaining Amt: \$0.00
Expand		0.00	Remaining Amt: \$9,178.00
Expand	Nursing C		ected Cost: \$3,618.68
Expand	Budget Type: State Plan Services	Projected Cost:	\$130,754.68

LOC – Waiver Nursing

THE OHIO DEPARTMENT OF DEVELOPMENTAL DISABILITIES
Medicaid Services System (MSS) - SPA Nursing

Welcome [redacted] [SUPPORT | PRINT](#)
[Home Administration | Help?](#)

Nursing Services Payment Authorization: [Authorizations not uploaded to CRM](#)

Home
Create a New Site
Search for Site by Site Name
Search by Person
Search for Site by Provider
SPA
Service Payment Authorization
Nursing Authorization
PA
Manage PA
PAWS
Cap Rules
Reports

County Board: BROWN
Pending Authorization Individuals: [redacted]
Cost Projection Spans: 7/12/2016 - 7/11/2017 - I/O - ENRL

For Cost of Care, the determination call (4th call) will itself pull the cost of care data automatically

LOC – Waiver Nursing

SAVE SAVE & CLOSE CONNECT | **VIEW NURSING SERVICES** ASSIGN EMAIL A LINK ***

INDIVIDUAL : INFORMATION

Nick Name
First Name *
Middle Name
Last Name *
Generation

Email
Date Of Birth *
Age
Full Name

Phone Information

Home Phone	--	Home Ext.	--	Mobile Phone	--
Work Phone	--	Work Ext.	--		
Other Phone Type	--	Other Phone	--	Other Ext.	--
		Account Type	--		

There is also a manual way to trigger Cost of Care. Open any individual. There will be a button at the top – “View Nursing Services”. Click on “View Nursing Services” and a new window will pop up.

LOC – Waiver Nursing

Select any of the Nursing Services from the list

The screenshot shows the 'Nursing Service View' in Microsoft Dynamics CRM. The interface includes a top navigation bar with 'Microsoft Dynamics CRM', 'IMAGINE', 'Individuals', and 'Cory Runner'. A 'New Alert (0)' button is visible on the left. The main content area is divided into sections: 'Individual Information', 'LOC', and 'Cost of Care Months'. The 'Individual Information' section has fields for 'Individual', 'SSN', and 'Date of Birth', with an orange redaction bar covering the input fields. The 'LOC' section features a 'Select Nursing Service' dropdown menu, which is currently open, showing two options: 'TDD - 1/1/2016 - 12/31/2016' and 'L1 - 2/8/2016 - 2/8/2017'. Below the dropdown is a table with columns for 'Waiver Type', 'End Date', 'Status', 'Approved Date', and 'Approved Amount'. The 'Cost of Care Months' section contains a table with columns for 'No.', 'Begin Date', 'End Date', 'Amount', and 'Is Sent to OB'.

Individual	SSN	Date of Birth
[Redacted]	[Redacted]	[Redacted]

Waiver Type	End Date	Status	Approved Date	Approved Amount
TDD - 1/1/2016 - 12/31/2016				
L1 - 2/8/2016 - 2/8/2017				

No.	Begin Date	End Date	Amount	Is Sent to OB
-----	------------	----------	--------	---------------

LOC – Waiver Nursing

LOC

Select Nursing Service: TDD - 1/1/2016 - 12/31/2016 ▼

Waiver Type	Begin Date	End Date	Status	Approved Date	Approved Amount
TDD	1/1/2016	12/31/2016	Enrolled	3/31/2016	\$12,000.00

Cost of Care Months

No.	Begin Date	End Date	Amount	Is Sent to OB	
1	3/1/2016	3/31/2016	\$1,200.00	Update	Edit
2	4/1/2016	4/30/2016	\$0.00	Update	Edit
3	5/1/2016	5/31/2016	\$3,000.00	Update	Edit
4	6/1/2016	6/30/2016	\$0.00	Update	Edit
5	7/1/2016	7/31/2016	\$0.00	Update	Edit
6	8/1/2016	8/31/2016	\$0.00	Update	Edit
7	9/1/2016	9/30/2016	\$0.00	Update	Edit
8	10/1/2016	10/31/2016	\$0.00	Update	Edit

Once you select a waiver span, you will see an Update button in the “Is sent to OB” Column. You can also click the button to trigger the Cost of Care process.

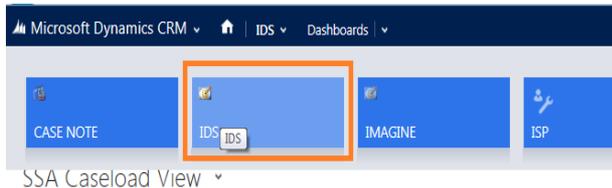
LOC - Upcoming Changes

Ohio Benefits Integration with Ohio Department of Medicaid

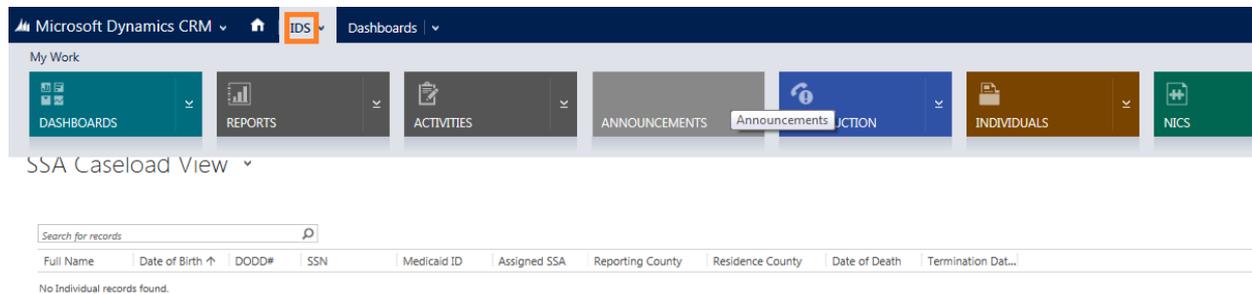
- Real Time Updates
- Medicaid Eligibility and Benefits
- Authorizations for Waiver Nursing Services
- Getting to Ohio Benefits Information for Individuals



LOC – Ohio Benefits



Log into imagineIS or IDS/LOC and click on IDS tile



Navigate to the last tile which is “Individual Medicaid”



LOC – Ohio Benefits

Microsoft Dynamics CRM | IMAGINE | Individual Medicaid...

You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics CRM Security Roles. [Assign Roles](#)

+ NEW | DELETE | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL | IMPORT DATA

Active Medicaid

Individual ↑	LOC Determinati...	Ohio Recipient S...	PersonID	Medicaid Billing...	LTC ID
	Packet -- Aaron...	Active Medicaid	20000000000000000001		
	Packet -- Aaron...	Active Medicaid	20000000000000000004		
	Placeholder Pac...	Active Medicaid	10000000000000000001		
	Placeholder Pac...	Active Medicaid	10000000000000000023		
	Placeholder Pac...	Active Medicaid	10000000000000000030		
	Placeholder Pac...	Active Medicaid	10000000000000000040		
	Placeholder Pac...	Active Medicaid	10000000000000000019		
	Packet -- Thoma...	Active Medicaid	10000000000000000024		
	Placeholder Pac...	Active Medicaid	10000000000000000026		

LOC – Ohio Benefits Process

The initial process starts with submitting the LOC if the LOC Packet is not created for the individual.

At that time, the LOC Packet will get created automatically and will also trigger the first handshake with Ohio Benefits.

LOC : INFORMATION

LOC Type	Assessment Reason	LOC Status	LOC #
Initial	Waiver	Completed	LOC104

Initial LOC (Active) DODD LOC D

General

LOC Type	Initial	Assigned Evaluator	
Assessment Reason	Waiver		
LOC Status	Completed		
Waiver Type *	SELF	Proposed Effective Date	11/1/2015
SELF (Child or Adult)	--		
Date of Assessment	9/21/2015		
Document(s) Review			
Location of Assessment	17		
Age Used for Assessment	20		

INDIVIDUAL DETAILS

LOC – Ohio Benefits Process

10000000000000000030-Runner

Medicaid Summary

- Medicaid Billing #
- OR Status
- PL Begin date
- Medicaid Begin date
- Medicaid Application
- RMP Begin date
- Hearing Request Date
- Appeal Number
- Medicaid Aid Code
- MC Enrollment Date
- MC Reason Code
- LTC ID
- Level of Care
- LTC Status
- Date of Death

- PersonID
- Medicaid Redet Date
- PL End date
- PL Amount
- Medicaid End date
- RMP End date
- MBWD Premium An

My Alerts

Search for records

Priority	Subject	Individual	Regarding
Yellow	Medicaid Information updated successfully		10000000000000000040-
Yellow	Medicaid Information updated successfully		10000000000000000023-
Yellow	Medicaid Information updated successfully		10000000000000000026-
Yellow	Medicaid Information updated successfully		10000000000000000024-
			10000000000000000024-

- SAVE
- SAVE & CLOSE
- DEACTIVATE
- DELETE
- ASSIGN
- SHARE

DODD LOC DETERMINATION PACKET : INFORMATION

Packet - 7/20/2015 2:1

Initial

LOC Determination Status **LOC Enrolled**

General

LOC Determination Status **LOC Enrolled**
PICT Approval **No**

- Share Secured Fields
- Email a Link
- Run Workflow
- Start Dialog
- Switch Process
- Edit Process
- Run Report
- Submit LTC Determination
- Sync OB Person**
- Other Activities
- Form Editor

Break

8:45 – 9:00 AM	Welcome
9:00 – 9:15 AM	Director John Martin
9:15 – 9:30 AM	DODD ITS General Updates – Michelle Burk, Deputy Director/CIO
9:30 – 9:50 AM	Microsoft Dynamics CRM Platform
9:50 – 10:15 AM	Level of Care/Ohio Benefits
10:15 – 10:30 AM	Break
10:30 – 12:00 PM	imaginelS
12:00 – 1:00 PM	Lunch
1:00 – 1:40 PM	Secure Entitlement Management System
1:40 – 2:25 PM	Upcoming DODD ITS Initiatives
2:25 – 2:40 PM	Break
2:40 – 3:10 PM	Review Data System/Restrictive Measures Notification
3:10 – 3:25 PM	State of Ohio Resources
3:25 – 3:30 PM	Wrap-up



Case Management Tool

Supporting Person-Centered Planning Drivers



**Increasing
DD
population**

**Insufficient
Funding**

**Outdated
Processes
and
Systems**

**No
Collaboration**

**Long
Waiting
Lists**

**Fewer Levy
Dollars &
Federal
Dollars**

**Inefficient
Processing
and Slow
Response**

**No Case
Management**

imagineIS Solution

Initially
Piloted with
18 Counties

**imagineIS Allows Case Managers to
Develop Goals & Outcomes in the 9 Key
Life Areas using a Person-Centered
approach**

**Cross-team Data Sharing to Include
Agreement, Approval, Goals, Services,
Individual ISP and Funding Source**

**Statewide
Initiative**



imagineIS – Business Testimonial

“...it is exciting that the ImagineIS is allowing all team members the ability to do online collaboration which is opening up a lot of opportunities for increased involvement by all support team members that are assisting an individual.

...increased integration of the IDS data in CRM is allowing a more seamless view of the data on a person when the user is performing various assessments and planning activities for the person.

...how important it is for everyone involved to be diligent about properly maintaining the core data.”

**Brian Harrigan, Medicaid Systems Consultant
Medicaid Development and Administration, DODD**

imagineIS – Training Feedback

SSA and Provider Trainings

- **“Thank you for your time and efforts. Your knowledge helped me to grasp many connections and tips that I did not know. I will be sending probably 8 of my SSAs over the next two trainings and am happy to let them know they can anticipate worthwhile training!”**
- **“Picked up some helpful tips as well as had some questions answered. Appreciate it!!”**
- **“The suggestions you made worked and I have published ...’s ISP!!! Thank you so much for your help and for being so diligent. I truly appreciate it.”**
- **“Today’s training was very informative. Excited to use the programs.”**
- **“Keep going in the direction you have for the last few months. Much improved over earlier groups...”**

The Time is Now”



Planning Principles

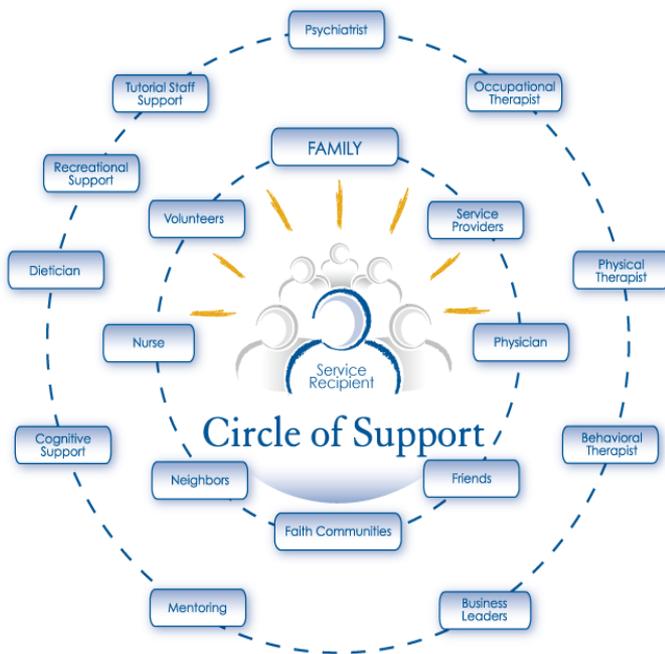
Beginning with a comprehensive understanding of the person is essential.

Empowering informed choices increases independence

Involving trusted supports increases opportunities for success.

Increased community membership enhances natural supports.

Ensuring plans and services are driven by the person is vital.



Person Centered Processes enabling the Circle of Support



Shift in Thinking



The Core Concepts : What's **Important TO** and What's **Important FOR**

What is **IMPORTANT TO** a person includes what results in feeling satisfied, comforted, fulfilled or happy

- Relationships (people to be with)
- Status and control (valued role)
- Rituals & routines (cultural and personal)
- Financial Resources
- Rhythm or pace of life
- Things to do and places to go (something to look forward to)
- Things to have



Within the context of those domains, **Important FOR** is addressed

What others see as necessary to help the person:

- Be valued (social rules, laws)
- Be a contributing member of their community (citizenship)
- Establish Financial stability

Address issues of health

- Prevention of illness
- Treatment of illness/medical conditions
- Promotion of wellness (diet, exercise, sobriety)

And issues of safety

- Environment
- Well being (physical and emotional)
- Free from fear (threats, abuse)



Intake & Eligibility



Customer Guides / Eligibility Specialists

- Find, Transfer or Create Individual
- Determine Eligibility

SSA Managers / Directors

- Assign Individual to an SSA

SSA's

- Invites Individual & Team Members
 - Family Member(s)
 - Guardian(s)
 - Provider(s)

Discovery

SSA's with Individual

- Personalize Home Page
- Essential Health
- Completes Relevant Discovery tools:
 - Finance
 - Relationships
 - Day to Day Life
 - Employment
 - Communication and Learning
 - Getting Around
 - Health and Wellness
 - Community Memberships
 - Home and Housing



Outcomes

SSA's with Individual

- Create Outcomes
- Create Service Listings
- Create Action Plan(s)
- Create Service Summary for Financial Review and Approval



Budget Approval



Budget Support Specialists

- Reviews / Completes Costing

Finance Managers

- Confirms Funds Availability
- Approves Funding

Individual Service Planning



SSA's with Individual, Provider(s), Family, Guardians, other team members:

- Assign Individual's selected providers to Services to achieve defined Outcomes
- Associates Provider(s) to Action Plan(s) for each Service

Providers

- Create their Action Steps to deliver services and achieve Outcomes

All Team Members

- Review each other's contributions to Draft Plans by submitting their written comments / feedback

ISP Publishing



Individuals, Family, Guardians, Providers, SSA's

- Contribute to the individual's circle of support
- Add learnings to Learning Logs
- Evaluate learnings to monitor progress and guide Outcome definition / achievement

SSA's

- Create Case Notes documenting case management activities used for TCM Claim Generation
- Evaluate progress
- Maintain existing plan
- Coordinate re-planning based on progress

Service Delivery

Individuals, Family, Guardians, Providers, SSA's

- Contribute to individual's circle of support
- Add learnings to Learning Logs
- Evaluate learnings to monitor progress and guide Outcome definition/achievement

SSA's

- Create Case Notes documenting case mgmt. activities for TCM Claim Generation
- Evaluate progress
- Maintain existing plan
- Coordinate re-planning based on progress

DODD Support Center

- County Board, COG, Provider phone and email support for process, policy/procedure

ITS Call Center

- Systems accounts, permissions, functions, how to phone and email support



Implementation, Training, and Support

ITS Continuous Circle of Support

- Onsite Readiness Preparation
- Tailored training to the county business requirements
- 32 Counties in different phases of adoption
- 1000+ imaginelS users trained
- 6500+ ISPs in process



Implementation, Training, and Support

ITS Continuous Circle of Support

- Online Training Materials
 - Videos, Slides, & Guides
 - www.DODD.Ohio.gov/imagineIS
- Ongoing Training
 - Face-to-face
 - Bi-monthly Webinars
 - County Specific
 - www.planetreg.com/imagine
- Release Notes
- ITS Call Center

Lunch

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Security Access Drivers



**Legacy
Proprietary
Security**

**Manual
Paper Forms**

**Counties
Needed to
Manage
their User
Base**

**No
Collaboration**

Needed to visualize relationships and control access to systems due to breadth and diversity of the user population and data

Secure Entitlement Management System (SEMS)

Electronics
Affidavits and
Approvals

Industry
Standard
and Scalable

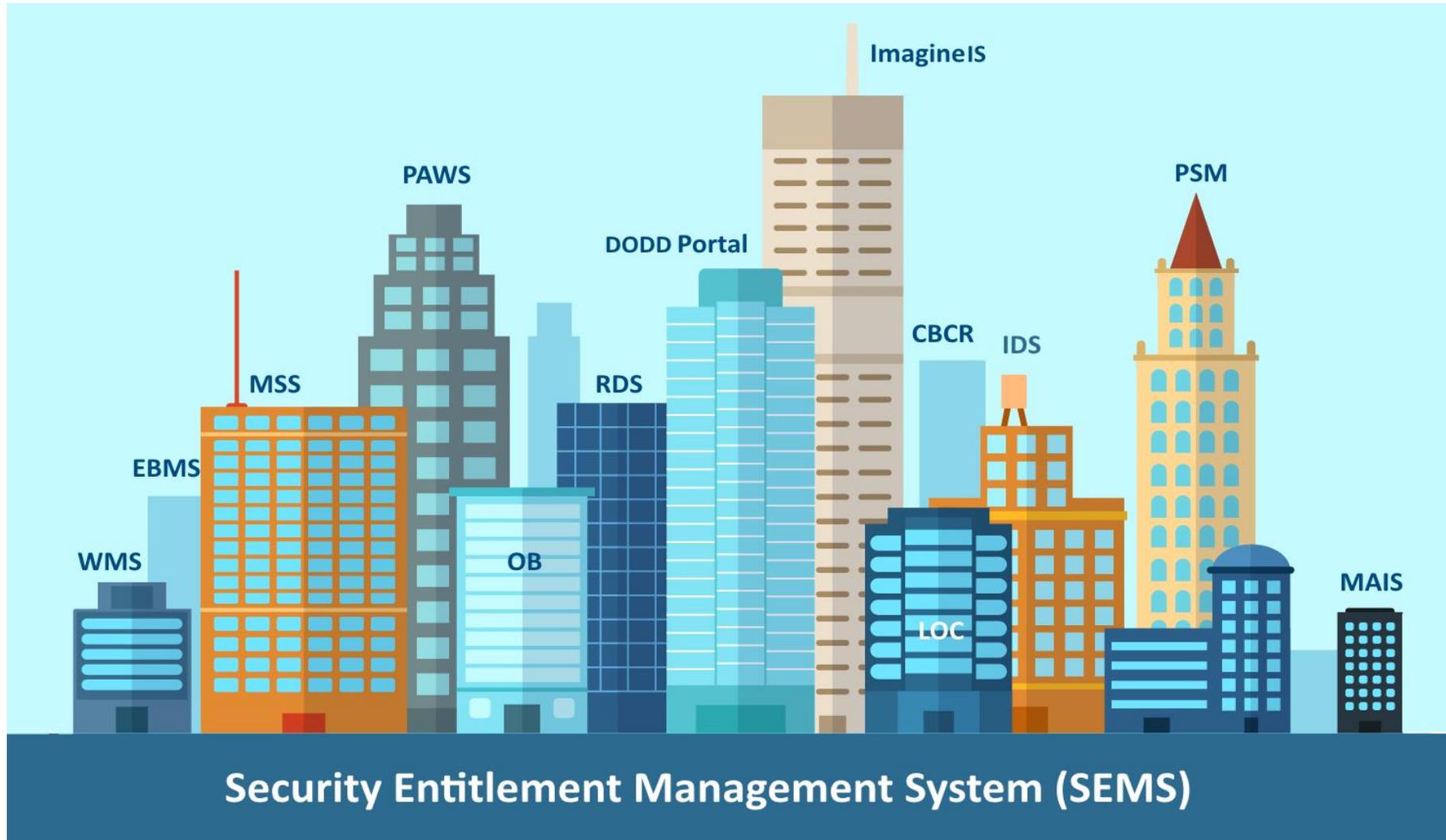
Self Service
and
Delegation

Single Sign-on
Experience

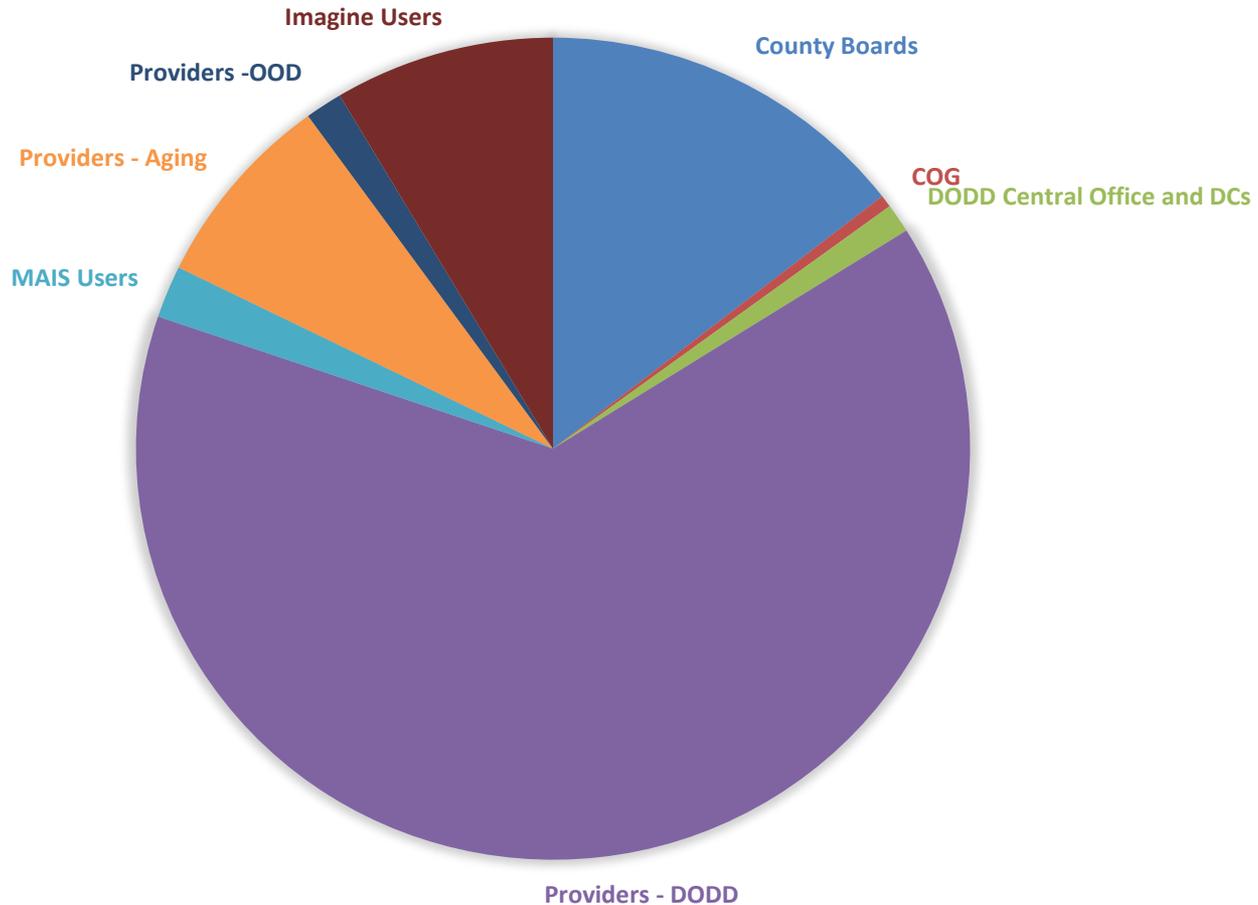
What is SEMS? –
“Safely and quickly facilitate access to DODD systems”



SEMS is Everywhere !!



Users Accessing DODD Systems



SEMS - Business Testimonial

“...Our SSA’s and administrative staff were spending an inordinate amount of time clicking in and out of the system because they could only access information on the Level of Care and imagine plans one county at a time...we now have “one site entry – one user name; one password code...”

**Steve Williams, Superintendent
BHN Alliance**

PASSWORDS ARE LIKE UNDERPANTS



Change them often, keep them private and never share them with anyone.

- Passwords expire every 90 days
 - Portal forces reset after 80 days
- Password complexity
 - At least (8) characters
 - At least (1) lower case character
 - At least (1) number
 - At least (1) upper case character
 - At least (1) special character

Password Reset

- Password Reset Link
- Question-based password reset
 - Password Reset Choices
- PIN-based password reset (workflow)

Pin-based Reset Process Overview

3 - Reset



FORGOT YOUR PASSWORD?

This form will help you restore access to your applications.

Your one-time PIN and link to reset password (Test)

 AgencyIDService@ohio.gov
To: ; ▾

Welcome to State of Ohio DODD!

Your Temporary PIN is: 171737
In order to change your password, click the following link:
[https://registerassociate.prodapps.dodd.ohio.gov/VerifyEmail.aspx?objID=\[redacted\]&validationCode=\[redacted\]](https://registerassociate.prodapps.dodd.ohio.gov/VerifyEmail.aspx?objID=[redacted]&validationCode=[redacted])

If you have any questions regarding your request please contact our support center for assistance.

By email: security-support@list.dodd.ohio.gov
Phone: 1-800-617-6733 (Toll Free) between 8.00 a.m. and 4.00 p.m

- Thank you

Email will be sent to the address on record



Potential Problem/Errors

- Service depends on the email system.
 - Incorrect email will result in failed requests.
Please contact DODD to repair email first.
 - Email delivery has been known to be delayed
- Password reset process must be completed before requesting another reset

Password Reset

- Failed Logon?
- Password Reset Link
- Password Reset Choices
- Question-based password reset
- PIN-based password reset

Question-based Reset Process Overview

- Helps the user to reset their password by answering pre-registered questions
- Each user must complete the Self Service registration prior to be enabled
- Once Self-Service registration is complete, the user can reset the password anytime
 - Using the Forgot Password or Change Password links

Register Password – Self-Service Answers

Ohio.gov | DODD

Password Registration: Register Your Answers

 One or more answers do not comply with policy.

You must answer at least 3 questions to register.

Each answer must contain at least four characters, and no two answers may be the same.

In what city or town was your first job?

What school did you attend for the first grade?

Answer is duplicated or has less than four characters.

Who was your childhood hero?

Answer is duplicated or has less than four characters.

The responses you provide are stored by your organization in Forefront Identity Manager.

Next

Cancel

© 2012 Microsoft Corporation. All Rights Reserved. | [About](#)

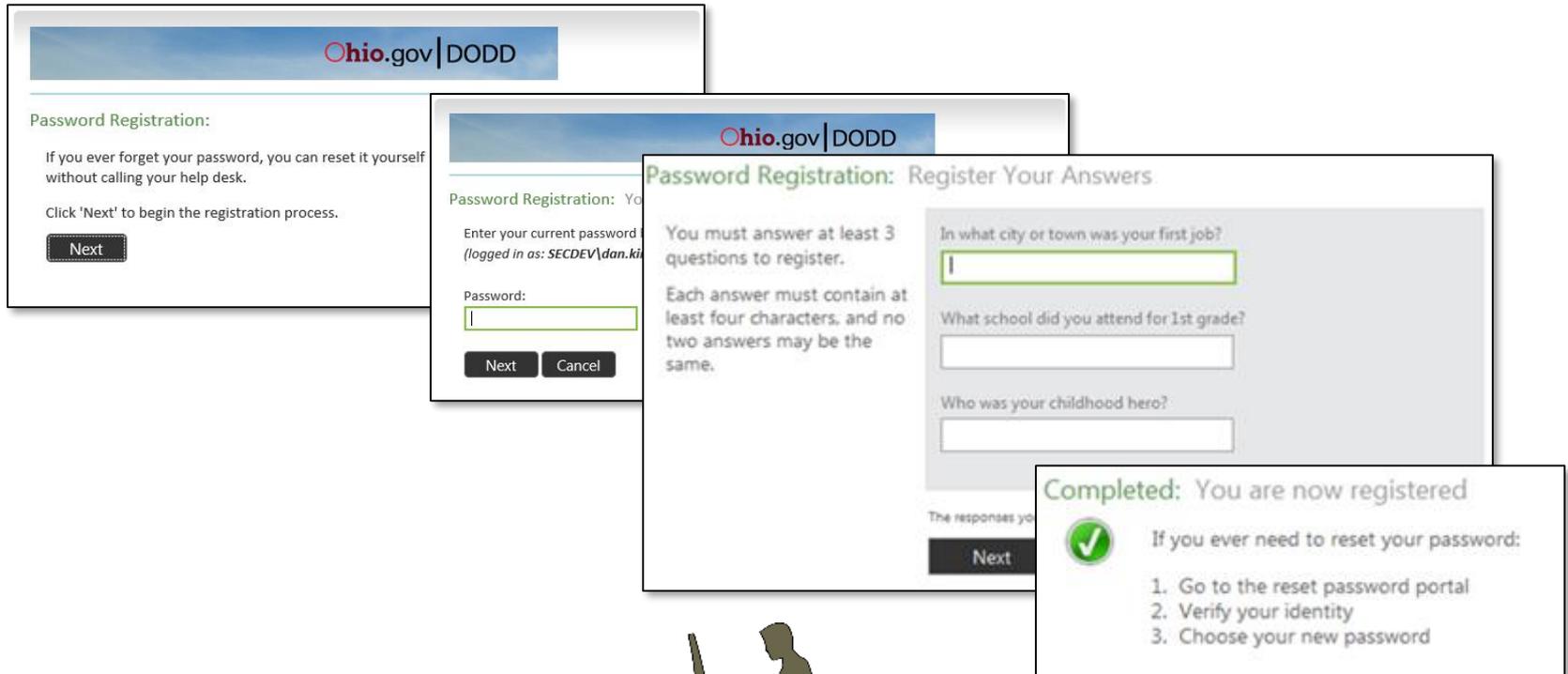
Question-based Reset Process Overview

1 - Notification

The screenshot displays a web browser window with the Ohio Department of Developmental Disabilities logo. The user is logged in as 'Test, Test' and has 0 new notifications and 2 new announcements. A 'View All' button is visible in the top right. Below the navigation bar, there is an 'Announcements' section header with a refresh icon and the text 'Last Updated 03/01/2016'. The main content area shows a notification dated 03/01/2016: 'You are now eligible to reset your password by answering your registered questions! In order to enable this feature you must first register your answers. Please follow the link below to register'. A red circle highlights the link 'Register For Password Reset', which is also pointed to by a red arrow. A small cartoon character is visible at the bottom left of the screenshot.

Question-based Reset Process Overview

2 - Enroll



Password Reset Process Overview

3 - Reset

Can be used anytime

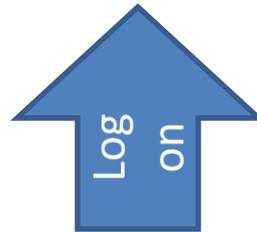
Questions must be answered exactly as they were entered

Once set, Navigate back to the main portal

The screenshot displays a web interface for password reset. At the top, it says "FORGOT YOUR PASSWORD?". Below this, there is a success message: "Success: Your password has been reset" accompanied by a green checkmark icon. A secondary message reads: "You can now use your new password to log in." At the bottom of the form area, there are "Next" and "Cancel" buttons. The Ohio.gov | DODD logo is visible at the top of the page. A copyright notice at the bottom reads "© 2012 Microsoft Corporation. All Rights Reserved. | About".

A silhouette of a person sitting at a desk with a computer, positioned in the bottom right corner of the slide.

Process Overview



Security Model

- Business Unit Group = Organizational Group

Quick Links

- Change Password
- New Account Enrollment
- Update my Account Profile
- Update my Account Access
- County Board Approver Functions

Ohio
Department of
Developmental
Disabilities

OHIO DEPARTMENT OF DEVELOPMENTAL 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 **Crown County**.

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

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

- Behavior Support (BSC) / Human Rights (HRC)**
- Budget Support
- Business Manager
- Customer Guide
- Eligibility
- Finance Agreement Coordinator
- Finance Manager
- Foundation
- Investigative Agent
- IT Specialist
- MUI Manager
- Nurse
- Quality Assurance
- SSA
- SSA Manager/Director
- Superintendent
- Waiver Admin

Security Model

Can I change my county's security model?

Approvers can request changes to their model through the ITS Call Center

- Request the addition or removal of job roles (Business Unit Groups) or Role Groups
- Request changes to rights assigned to Role Groups

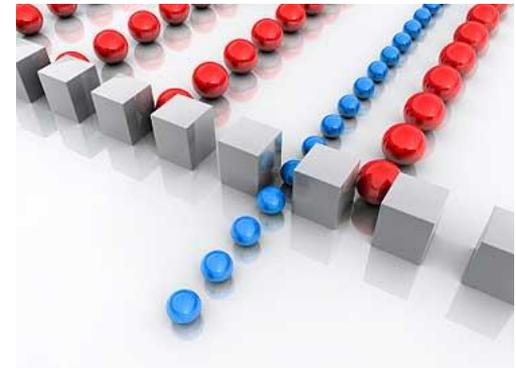
Access

How do I get access?

All County and COG system access is requested by the user and approved by an “Approver”

Can I request additional access?

This feature was added in May 2016.



Requesting Additional Access

Choose the access type

Choose Submit and your request will be submitted for approval. You may close the page at this point.

UPDATE MY ACCOUNT ACCESS

Step 3: Confirm Requested Functions

You have selected the following **Functions** to be added to your account:

County-Crown-sp_CaseNoteQA

That's it - you're all finished! Your request has been submitted for approval.

If you have recently requested new functions, allow at least 5 business days for your request to be processed. If after that time you have had no response, please contact your manager or supervisor for assistance.

Back Continue

Continue

Quick Links

Change Password

New Account

Update my

Update my Account Access

County Board Approver Functions

You will receive an email once the request has been approved

Renewals

All Approvers will receive an email at the first part of each month. The email contains...

- A list of users expiring in the next 45 days
- A link to go to the renewals interface
- The renewals page requires an Approver to log on

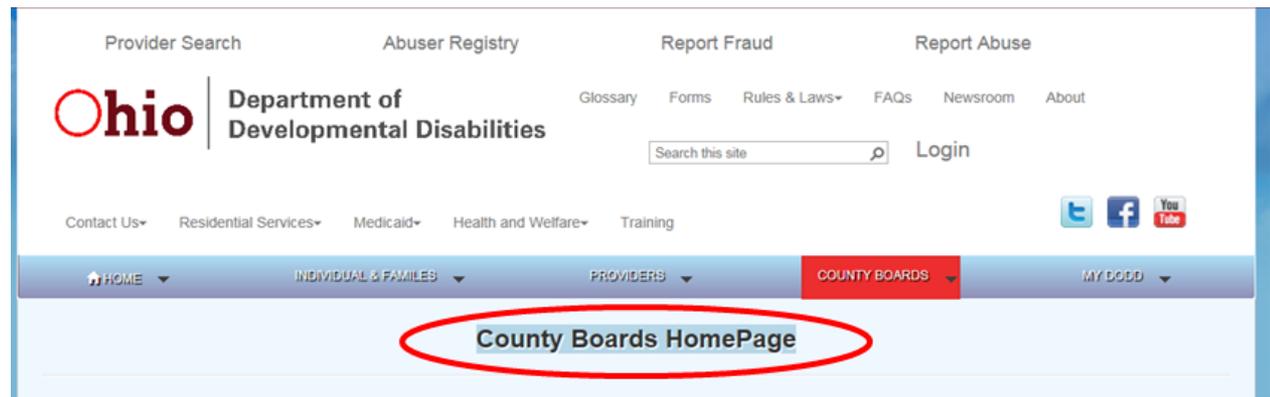
Renewals

Added January 2016



A County Board Approver should go to the DODD Portal homepage (<https://doddportal.dodd.ohio.gov>) and select “County Boards”.

Select “County Boards HomePage”



Renewals

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) by providing training and technical assistance through the support of regional consultants; ensuring quality taxpayer dollars through the state accreditation process; and, credentialing County Board employees through the registration process.

Update County Board Info

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

Quick Links

- Change Password
- New Account Enrollment
- Update my Account Profile
- Update my Account Access
- County Board Approver Functions**

Select the “**Country Board Approver Functions**” link will be located under “**Quick Links**”.

USER PROFILE MANAGEMENT FUNCTIONS FOR COUNTY BOARD APPROVERS

This application will allow approvers to modify profile-related information in the system.

User Report Renewals

This application allows managers to collectively renew permissions for their reports.

Disable Users

Approvers of counties can disable user under them.

Choose **User Report Renewals**

Renewals

ADMINISTRATION: USER RENEWALS

This page will allow you to update renewals for your users in the system. Please be sure to verify your selections carefully - once set, you will not be able to reverse your selection without assistance from the Help Desk.

This wizard will guide you through the process of easily renewing access for multiple users. This process will allow the user to approve the access extension directly without the need to repeat the entire workflow approval process.

- COG SOC
- County Adams
- County Cuyahoga

Select a county and click the **Continue** button.

Select all the users you want to renew by “checking each box”. Then click the **Continue** button.

ADMINISTRATION: USER RENEWALS

This page will allow you to update renewals for your users in the system. Please be sure to verify your selections carefully - once set, you will not be able to reverse your selection without assistance from the Help Desk.

Step 1: Select the users to Update.

Below is a list of people whose access will expire within 45 days of today's date [Thursday, March 05, 2015].

Please note: Users who are not renewed at this time will appear on this list until the expiration date passes. Once the date expires, you will need help from the Help Desk in order to renew that user's access.

This is a list of people who can be approved for renewal by [redacted] and are managed by [redacted] County. Please select those users that you wish to extend access for another year.

- Has Roles [redacted] [Account expires in 5 Days]
- Has Roles [redacted] [Account expires in 10 Days]

Renewals

ADMINISTRATION: USER RENEWALS

This page will allow you to update renewals for your users in the system. Please be sure to verify your selections carefully - once set, you will not be able to reverse your selection without assistance from the Help Desk.

Step 2: Verify user to Update.

Please verify the list of accounts you are about to approve. Upon completion, these user's expiration date will be updated to [Saturday, March 05, 2016].

This is a list of people who report to **DODD, Eric** and are managed by **ADAMS** County.
These are the users that you wish to extend access for another year.

HasRoles75QA, Joe [Account expires in **5** Days]
HasRolesQA1004, Joe [Account expires in **10** Days]

Verify the user accounts you are about to renew and click the **“Renew Users”** button.

You will receive a confirmation message that the changes have been made.

ADMINISTRATION: USER RENEWALS

This page will allow you to update renewals for your users in the system. Please be sure to verify your selections carefully - once set, you will not be able to reverse your selection without assistance from the Help Desk.

Step 2: Verify user to Update.

Please verify the list of accounts you are about to approve. Upon completion, these user's expiration date will be updated to [Saturday, March 05, 2016].

This is a list of people who report to [REDACTED] and are managed by [REDACTED] County.
These are the users that you wish to extend access for another year.

HasRoles75QA, Joe [Account expires in **5** Days]
HasRolesQA1004, Joe [Account expires in **10** Days]

That's It - you've updated your users' credentials!

The Expiration date change is immediate - no other action is necessary.

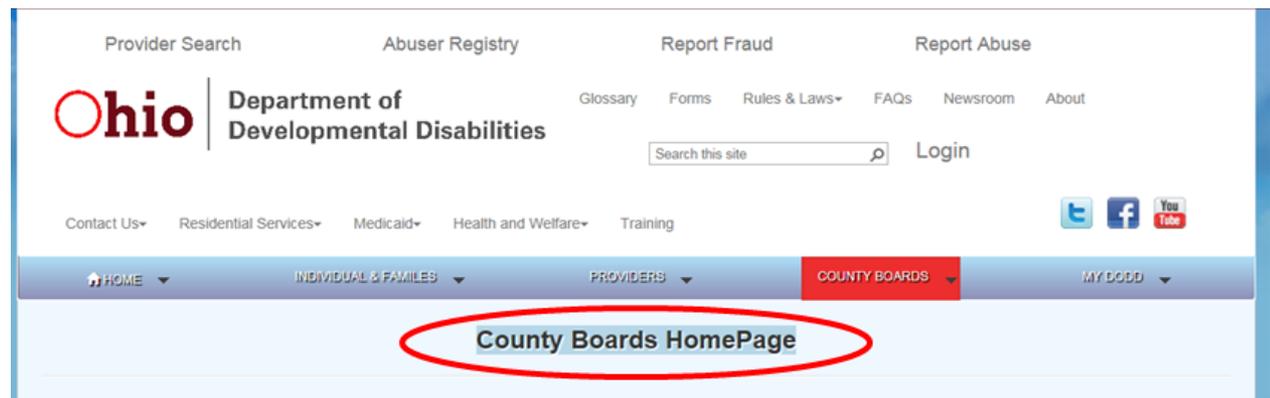
Disable User Access

Added January 2016 - Approvers can disable a user at any time



A County Board Approver should go to the DODD Portal homepage (<https://doddportal.dodd.ohio.gov>) and select “County Boards”.

Select “County Boards HomePage”



Disable User Access

Home → County Boards

County Boards

Welcome

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This application will allow approvers to modify profile-related information in the system.

[User Report Renewals](#)

This application allows managers to collectively renew permissions for their reports.

[Disable Users](#)

Approvers of counties can disable user under them.

Choose **Disable Users**

Disable User Access

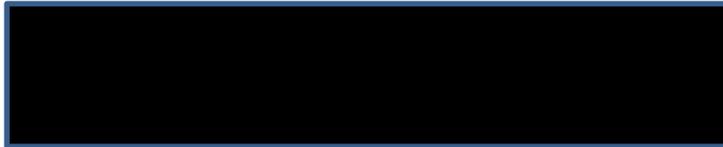
DISABLE USERS

This page will allow you to disable the users for whom you are approver in county.

Name:

User ID:

Email Address:



Select a county and
Click **Continue** button.

Select a County

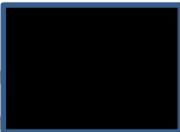
Based on your affiliation, here are a list of **Counties** that are available for you to request.

Please select one.

COG

Coun

Coun



Continue

Enter at least 2 characters
matching either Display Name,
Email or Account name. And
click on **Search** button.

DISABLE USERS

This page will allow you to disable the users for whom you are approver in county.

Name:

User ID:

Email Address:



[Not your email address?]

Search Criteria:

John

Search

Please enter at least 2 characters matching either Display Name, Email or Account name.

Search for active members of: County Adams

Back

Disable User Access

DISABLE USERS

This page will allow you to disable the users for whom you are approver in county.

Name:

User ID:

Email Address:

Search Criteria:

Please enter at least 2 characters matching either Display Name, Email or Account name.

Search for active members of: County Adams

DisplayName	Email	AccountName	Disable
Doe, John	John.Doe@XXXXXXX.XXX	doejo	<input checked="" type="checkbox"/>

Select one or more accounts from the list by checking the **Disable** column and click '**Disable Selected Users**' button.

To confirm disabling the selected user, click the **Continue** button.

DISABLE USERS

This page will allow you to disable the users for whom you are approver in county.

Name:

User ID:

Email Address:

Are you sure, you wan to disbale the following:

1. Doe, John

Disable User Access

DISABLE USERS

This page will allow you to disable the users for whom you are approver in county.

Name:

User ID:

Email Address:



Your request was processed and following user(s) were disabled:

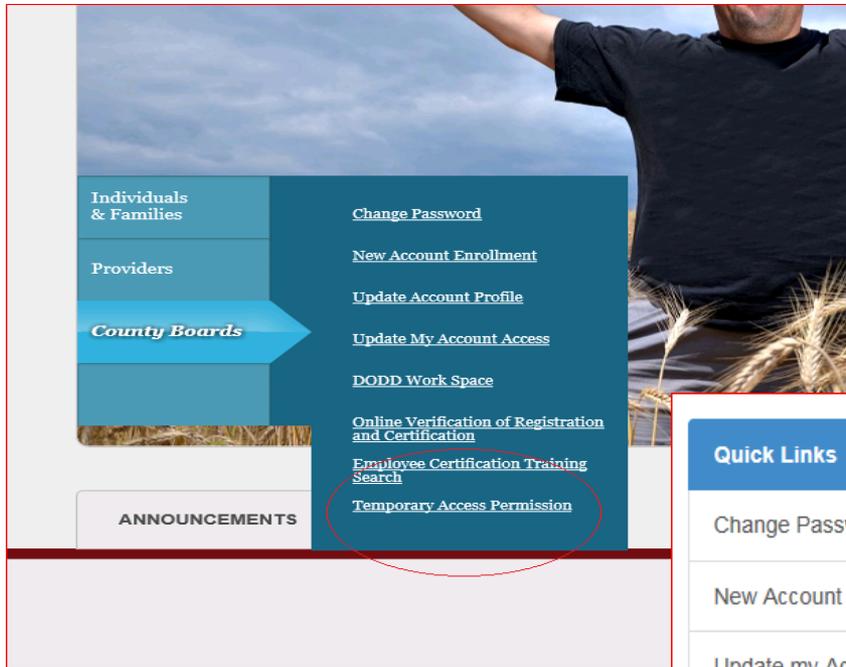
1. Doe, John

Upon clicking the “**Continue**” button, a request to disable the selected account would be processed.

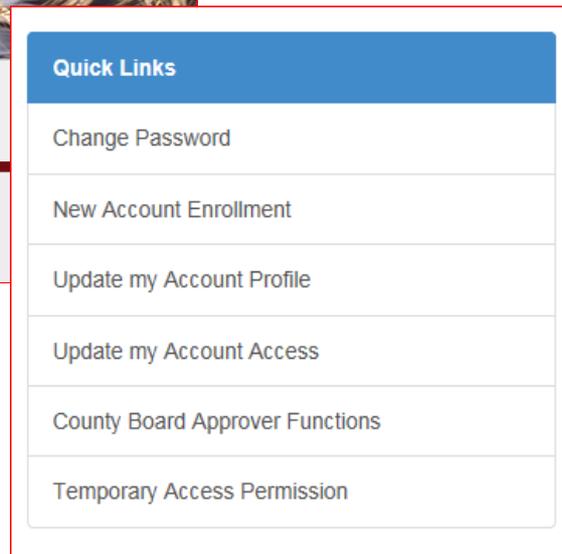
Please allow 10-15 minutes to disable the accounts.

AdHoc Permissions

- Added June 2016 - Approvers can grant adhoc permissions



Select **Temporary Access Permission** from the Portal or Quick Links.



AdHoc Permissions

AD HOC USER ROLE ASSIGNMENT

This form is a simple tool that allows an Administrator to grant specific Roles for a given time period. This functionality is provided as a stop-gap solution for assigning users to a particular permission without the need to modify the user's permanent access. The administrator is allowed to grant roles to those individuals of which they were administrators.

Note: Permissions granted via this form will override any permissions that were assigned by the Role Groups functionality of the FIM Portal.

Unfortunately, your account does not contain the proper clearance to assign adhoc permissions. Please contact a person within your group to add AdHoc permissions to users.

Landing page –
No Access

AD HOC USER ROLE ASSIGNMENT

This form is a simple tool that allows an Administrator to grant specific Roles for a given time period. This functionality is provided as a stop-gap solution for assigning users to a particular permission without the need to modify the user's permanent access. The administrator is allowed to grant roles to those individuals of which they were administrators.

Note: Permissions granted via this form will override any permissions that were assigned by the Role Groups functionality of the FIM Portal.

Your account appears to be authorized to grant permissions. Please press the 'Begin' button.

Begin

Landing page –
Approver

AdHoc Permissions

Ad Hoc User Role Assignment

This form is a simple tool that allows an Administrator to grant specific Roles for a given time period. This functionality is provided as a stop-gap solution for assigning users to a particular permission without the need to modify the user's permanent access. The administrator is allowed to grant roles to those individuals of which they were administrators.

Note: Permissions granted via this form will override any permissions that were assigned by the Role Groups functionality of the FIM Portal.

Step 1: Select the Person(s) who will receive the adhoc permission.

Note that the list will reflect only those persons within your scope of approval in your Business Unit Group. You may search by email, user Code, or the user's Last Name.

User Name or ID:

Note: To perform a wildcard search, use an asterisk [*] before and/or after your search string.

User Name or ID:

Note: To perform a wildcard search, use an asterisk [*] before and/or after your search string.

There were [6] record(s) that met your criteria.

	User Name	Email	Business Unit
<input type="checkbox"/>	IAFAdmin1, System		ounty_Boards
<input type="checkbox"/>	IAFAdmin2, System		ounty_Boards
<input type="checkbox"/>	IAFOA3, Tester		ounty_Boards
<input type="checkbox"/>	IAFOA3, Tester		ounty_Boards
<input type="checkbox"/>	IAFSubmission, Tester		ounty_Boards
<input type="checkbox"/>	IAFSubmission, Tester		ounty_Boards

Select the Person(s) who will receive the adhoc permission.

AdHoc Permissions

Ad Hoc User Role Assignment

This form is a simple tool that allows an Administrator to grant specific Roles for a given time period. This functionality is provided as a stop-gap solution for assigning users to a particular permission without the need to modify the user's permanent access. The administrator is allowed to grant roles to those individuals of which they were administrators.

Note: Permissions granted via this form will override any permissions that were assigned by the Role Groups functionality of the FIM Portal.

Step 1: Select the Person(s) who will receive the adhoc permission.

IAFOA3, Tester [iafoa3te]

Step 2: Select the Role Group to which the user will require access.

Choose at least one (1) Role Group that you will be granting access to the user(s) listed above. This selection will govern the applications made available, but will not constitute membership into the actual role group.

Number of Groups available: 17

	Display Name	Scope	Type	Membership Locked?
<input type="checkbox"/>	COG-FAIRWAYS	Universal	Security	false
<input type="checkbox"/>	COG-LICK RICH	Universal	Security	false
<input type="checkbox"/>	COG-MEORC	Universal	Security	false
<input checked="" type="checkbox"/>	COG-NEON	Universal	Security	false
<input type="checkbox"/>	COG-NOWAC	Universal	Security	false
<input type="checkbox"/>	COG-SOC	Universal	Security	false
<input type="checkbox"/>	Ohio-DODD	Universal	Security	false
<input type="checkbox"/>	Ohio-OOD-Provider	Universal	Security	false
<input type="checkbox"/>	Ohio-OOD-Staff	Universal	Security	false

Back

Continue

Select the Role Group to which the user will require access.

AdHoc Permissions

AD HOC USER ROLE ASSIGNMENT

This form is a simple tool that allows an Administrator to grant specific Roles for a given time period. This functionality is provided as a stop-gap solution for assigning users to a particular permission without the need to modify the user's permanent access. The administrator is allowed to grant roles to those individuals of which they were administrators.

Note: Permissions granted via this form will override any permissions that were assigned by the Role Groups functionality of the FIM Portal.

Step 1: Select the Person(s) who will receive the adhoc permission:

IAFOA3, Tester [iafoa3te]

Step 2: Select the Role Group to which the user will require access:

COG-WESTCON

Step 3: Select the Role(s) you wish to assign to the User(s) listed above.

These roles will be assigned to the user outside of any Role Group membership, and will override any existing memberships. Note that if not applied properly, role assignment could lead to unnecessary and unintentional permission over-granting.

There are 117 Roles available.

-- Please select a System. --

Back

Continue

Select the Role(s) you wish to assign to the user.

There are 117 Roles available.

-- Please select a System. --
-- Please select a System. --
Asset Inventory System [AIS]
BIReports [BIReports]
Contact Management System [CNT]
Daily Rate Application [DRA]
Electronic Medicaid Billing System (2011 Update) [eMBS]
Imagine - Level of Care [LOC]
Imagine Access from DoDD Portal [ImagineCrm]
Individual Data System [IDS]
ITS Rewrite in ASP 2.0 [ITS_Revise]
Medicaid Services System [MSS]
Payment Authorization for Waiver Services2 [PAWS2]
Preliminary Implementation Component Tool [PICT]
Provider Certification Wizard [PCW]
Registration System [REG]
Title XX Quarterly Report [TXX]
Unassigned Role
Waiver Management System [WMS2]

There are 117 Roles available.

Payment Authorization for Waiver Services2 [PAWS2]

	System	Role Name	Description
<input checked="" type="checkbox"/>	Payment Authorization for Waiver Services2	PAWS2County	PAWS2County Object
<input checked="" type="checkbox"/>	Payment Authorization for Waiver Services2	PAWS2ReadOnly	PAWS2ReadOnly Object
<input type="checkbox"/>	Payment Authorization for Waiver Services2	PAWS2XML	PAWS2XML Object

Back

Continue

AdHoc Permissions

AD HOC USER ROLE ASSIGNMENT

This form is a simple tool that allows an Administrator to grant specific Roles for a given time period. This functionality is provided as a stop-gap solution for assigning users to a particular permission without the need to modify the user's permanent access. The administrator is allowed to grant roles to those individuals of which they were administrators.

Note: Permissions granted via this form will override any permissions that were assigned by the Role Groups functionality of the FIM Portal.

Step 1: Select the Person(s) who will receive the adhoc permission:

IAFSubmission, Tester [iafsubmist]

Step 2: Select the Role Group to which the user will require access:

COG-WESTCON

Step 3: Select the Role(s) you wish to assign to the User(s) listed above.

PAWS2County
PAWS2ReadOnly

Step 4: Set the expiration date for the Ad Hoc access.

As these roles are directly assigned to the user bypassing Role Group memberships (and constraints), it is necessary to limit this access to a maximum of the user's expiration date.

Note:

Your user's account expiration date is [1/1/2030].

The maximum date that the access can be granted is [1/1/2030].

You must select a date that starts after [5/6/2016].



We're ready to validate your selections.

Set the expiration date for the Ad Hoc access.

AdHoc Permissions

AD HOC USER ROLE ASSIGNMENT

This form is a simple tool that allows an Administrator to grant specific Roles for a given time period. This functionality is provided as a stop-gap solution for assigning users to a particular permission without the need to modify the user's permanent access. The administrator is allowed to grant roles to those individuals of which they were administrators.

Note: Permissions granted via this form will override any permissions that were assigned by the Role Groups functionality of the FIM Portal.

FINAL STEP: VERIFY YOUR SELECTIONS.

* **This Person who will receive the adhoc permission:**

IAFSubmission, Tester [iafsubmist]

* **This is the Role Group to which the user will require access:**

COG-WESTCON

* **This is the Role(s) you wish to assign to the User(s) listed above.**

PAWS2County
PAWS2ReadOnly

* **This is the expiration date for the User's Ad Hoc access.**

05/19/2016

Please verify your intent. If you are satisfied with your selections, please press the 'Create AdHoc Permissions' button

Note: Once you create the access, that access can only be terminated by its expiration date or by contacting the Help Desk.

Back

Create the AdHoc Permissions

Verify your selections and click the **Create the Ad Hoc Permissions** button.

Provider System Access

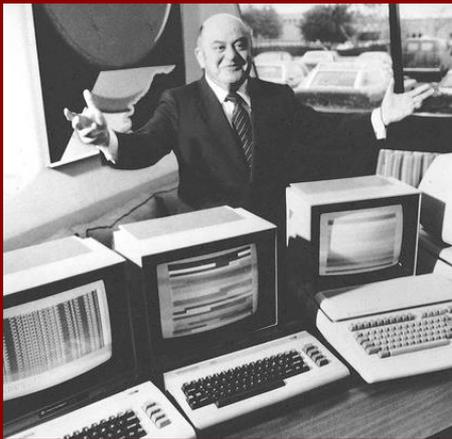
- DODD is Working To Eliminate Paper Processing (“Current Method”)
 - User account creation is paperless now for Providers
 - Affiliation requests still require a Paper Affidavit
- Updated Systems Use Electronic Invitation or Electronic Request/Approval (“New Method”)
- More updates underway to completely eliminate paper handling/faxing

Upcoming Initiatives

- CRM Environment Updates
- DODD Assessment Center
- DODD Download Center
- WMS Rewrite
- PSM
- CBCR
- Employment
First



CRM Update Drivers



Starting to Fall Multiple Versions Behind

Lack of Support for Newer Devices and Browsers

Can't Access the Latest Features and Functionality

Navigation Through the Application Could be Improved

CRM Environment Solution

**Runs on State of Ohio
Private Cloud**

**Secured to Meet Many
State and Federal
Requirements**

**Improved Cost Savings and
Support**

**Improved Navigation and
Improved Device and
Browser Support**

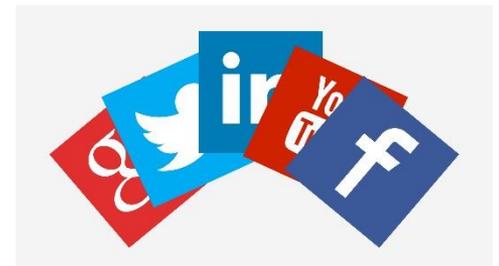


CRM Environment Updates

How does it affect me?



- Improved “Google/Bing” Search
- Improved Supported Devices
 - Windows 8.1 64 bit, Windows 10, more tablets and the addition of mobile smartphones
- Improved User Interface
- Better Social Media Integration
- Security



DODD Assessment Drivers



Siloed Manual Processes

No System Integration

Paper Driven Process

Support for Archival of
Electronic Documents was
Limited

DODD Assessment Center Solution

Co-location of Assessments

Electronic Processes

Support of Electronic Document Management

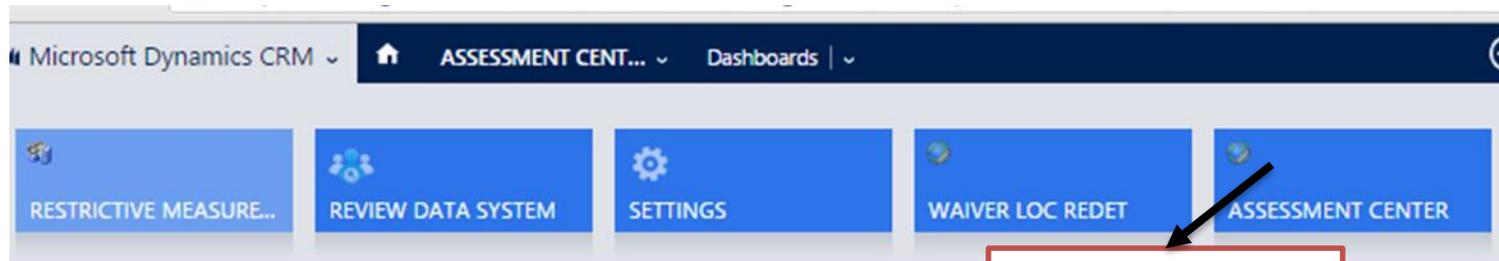
Built on the CRM Platform

Supports Retirement of IDS

Integration with Related Systems



DODD Assessment Center



User Selects
Assessment
Center

DODD Assessment Center

Landing Page

The screenshot shows the Microsoft Dynamics CRM interface for the 'ASSESSMENT CENT...' dashboard. The main content area displays three data tables, each with a search bar and a list of records. Blue arrows point from the table headers in the left sidebar to the corresponding table in the main view.

Active Behavior Add-Ons

Individual	DODD# (Individual)	Medicaid ID (Individual)	Reporting County...	Created On	Proposed Start Date...	Type of Budget
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	5/23/2016 8:29 AM		
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	5/19/2016 1:03 PM		
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	5/23/2016 8:43 AM		
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	5/23/2016 3:48 PM		

Active Prior Authorizations

Name	Created On
PA Request for [REDACTED]	5/23/2016 9:00 AM
PA Request for [REDACTED]	5/24/2016 12:19 PM

Active Nursing Waivers

Name	Created On
Assessment for [REDACTED]	5/24/2016 12:18 PM
Assessment for [REDACTED]	5/24/2016 12:18 PM

DODD Assessment Center

Individual List/Search

- List of Individual as per role
- Search Individual
 - Name, DODD#, Medicaid#

Microsoft Dynamics CRM | ASSESSMENT CENT... | Individuals | Create

EDIT | DELETE | MERGE | SEND DIRECT EMAIL

Search Results | eZ

Full Name	Date of Birth	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence Count...	Funding Type
[REDACTED]	2/24/1998	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	1/9/2013	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Microsoft Dynamics CRM | ASSESSMENT CENT... | Behavior Add-Ons | New Behavior Add-...

BEHAVIOR ADD-ON : INFORMATION
New Behavior Add-On

Individual [Redacted]

DODD# [Redacted]
Medicaid ID --
Date of Birth * 2/24/1998

Guardian Guardian Contact [Redacted]

County Board Information --

GO TO MSS + NEW ...

Assessment Status

Not Created
Draft
Submitted To RS
Awaiting Informa
Approved
Denied
Active

Type of Budget -- Proposed Start Date of Add-On: -- End Date Add-On: --

Individual Add-On Span
Wavier : 04/01/2015 - 03/12/2016

Site Name	Add-On Type	Move In Date	Move Out Date
[Redacted]	Behavior Support	04/01/2015	12/31/9999

1. Has the Individual Been Assessed Within the last 12 Months to present a danger to self or others and/or have the potential to present a danger to self or others? No

Restrictive Measures Notifications (Individual)

Individual	Authors Position Title	Created On	Projected Implementation...	Projected Expiration Date	Status	CBDD	Reporting Count...
[Redacted]	DEV	4/14/2016 11:4..	4/14/2016	12/14/2016	Submit	Yes	LICK
[Redacted]	DEV	4/14/2016 11:4..	4/14/2016	12/14/2016	Submit	Yes	LICK

ISP Info

ISPs (Individual)

Individual	Name	Current As Of	Phase	Approvals Need...	Agreements Need...	HRC Review	HRC Committee...	BSC Review	BSC Committee...	Created On
[Redacted]	[Redacted]	4/8/2015	Working Draft - Internal	Yes	Yes	No	No	No	No	4/8/2015 1:27 PM

Guardian info
CB Contact

Navigate to MSS

MSS Add-on Info
with Site

RMN Info

DODD Assessment Center

MSS Data Sync

THE OHIO DEPARTMENT OF DEVELOPMENTAL DISABILITIES
Medicaid Services System (MSS) - Manage Individuals

Welcome [REDACTED] [SUPPORT](#) | [PRINT](#)
[Help Administration](#) | [Help?](#)

Home
Create a New Site
Search for Site by Site Name
Search by Person
Search for Site by Provider

PA
Manage PA
PAWS
Cap Rules
Reports
CPT
Manage Individuals
Manage Providers
Manage HPC Staffing Patterns
Manage HPC Calendar
Manage ADS/NMT Patterns
Manage ADS/NMT Calendar
Manage Nursing Patterns
Manage Nursing Calendar
Manage Unscheduled ADS/NMT
Manage Unscheduled Services
-For Multiple Individuals
-For One Individual
Manage Unscheduled Nursing Services
Manage Cost Projections

PA
Manage Individual PA
SPA
Service Payment Authorization
Nursing Authorization
DRA
REPORTS

Site Name: [REDACTED] Effective Date: 11/1/2011 End Date: 11/13/2012
Manage: [Site Home](#) | [Edit Site](#) | [Manage Versions](#) | [Manage Notes](#) | [Add Non-Waiver Spans](#) | [Add DRA Exemption](#)

Manage Individuals: [Add Individual](#)

Individual:	DODD Number:	Medicaid Billing Number:	Residence County:
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Individual Add-On Spans [X]

[REDACTED] DODD # [REDACTED] Medicaid # [REDACTED]
Date of Birth [REDACTED] Residence County: [REDACTED] Reporting County: [REDACTED]
Waiver: 01/10/2012 - 09/17/2012 [Change](#) Type: I/O Status: ENRL [Add New Span](#)

Add-On Type	Start Date	End Date
Behavior Support	06/01/2012	06/15/2012

[Edit](#) | [Remove](#)

DODD Assessment Center - Create PA

Microsoft Dynamics CRM | ASSESSMENT CENT... | Prior Authorizations | 16194 | Create

SAVE | SAVE & CLOSE | GO TO MSS | + NEW

PRIOR AUTHORIZATION : INFORMATION
16194

Individual Information

Individual/Dodd# [Redacted] Address [Redacted]
 Medicaid ID -- City [Redacted]
 DODD# [Redacted] State [Redacted]
 Residence County [Redacted] Zip [Redacted]

I Live with **Family**

Guardian Information (if applicable)

Guardian Name --
 Phone Number --
 Address --
 City --
 State --
 Zip --

Authorized Representative Info(if applicable)

Name --
 Phone Number --
 Address --
 City --
 State --
 Zip --

PA Contact Information

Name --
 Email Address --

Waiver CP Summary

New \$ amount

Total Dollar Amount Requested during the Noted Prior Authorization period: \$ DDP Exception

Waiver Cost Projection Detail

Budget Type:	DDP	Projected Cost:	\$4,998.00	Budget Max:	--	Remaining Amt:	(\$4,998.00)
Budget Type:	ADS	Projected Cost:	\$0.00	Budget Max:	--	Remaining Amt:	\$0.00
Budget Type:	NMT	Projected Cost:	\$0.00	Budget Max:	\$9,643.00	Remaining Amt:	\$9643.00

The Prior Authorization Request will be reviewed based only on the services and amounts listed with the CP.

The Individual's Full Waiver Span --

The County Board attests that the IRF with Individual/Guardian Signature is kept on file.

Signature date on IRF Filed 5/25/2016

DODD Assessment Center

Waiver Nursing

Microsoft Dynamics CRM | ASSESSMENT CEN... | Waiver Nursing Ser... | 00011 | Create

New Alert (1) Latest: You've got an alert for the mailb... 8/5/2015 1:33 PM View Alerts

SAVE SUBMIT TO DODD GO TO MSS SAVE & CLOSE NEW DEACTIVATE

WAIVER NURSING SERVICE : INFORMATION

00011

RPS2 Reviewer: DODD RPS Status Reason: Approved

General

Individual

Name of assessor: --

Name(s) of informan: --

Info

Finalized Cost Projection as of 06/02/2016

[View MSS Wavier Nursing Finalization Report](#)

Budget Type:	Waiver Services	Projected Cost:	\$0.00
Budget Type:	State Plan Services	Projected Cost:	\$0.00

Document

Wavier Nursing Assessment Details

Care Required

Classifications

How are current needs being met now?

Future needs to be met?

If classified #1 with no nursing authorized, explain why not.
If classified #2, and there is nursing, explain why

Tracheostomy

1) Performing respiratory assessment

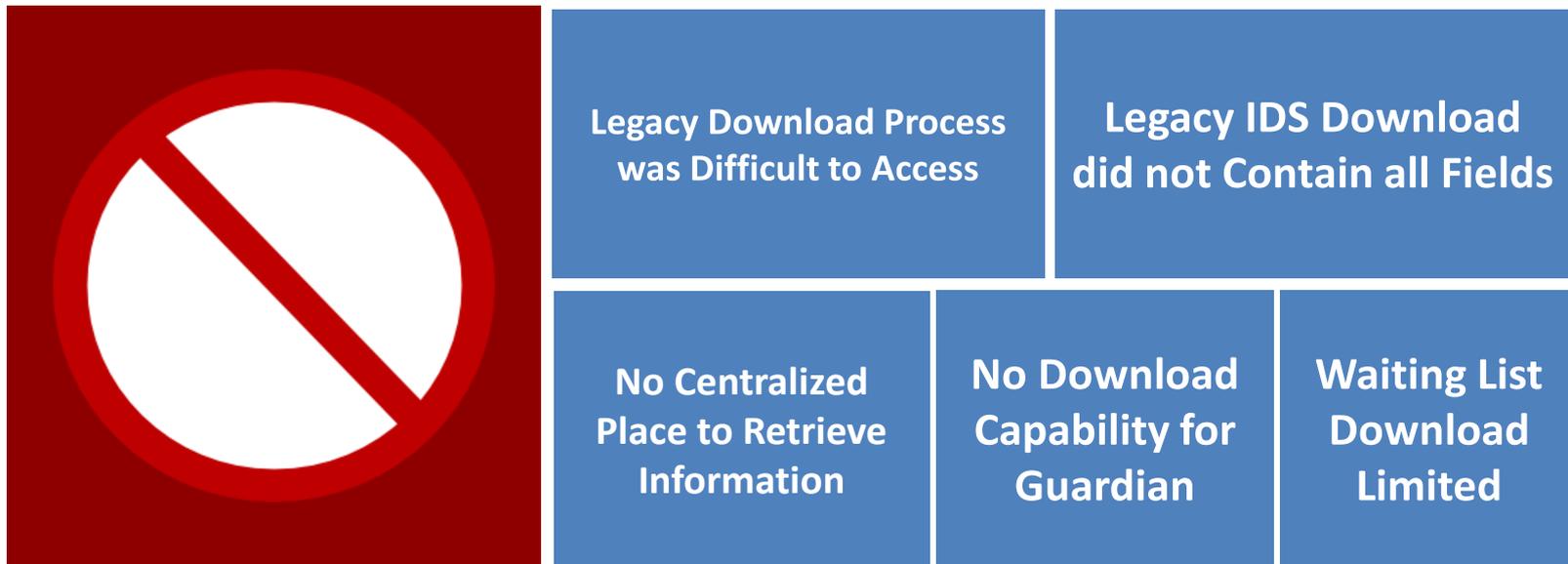
2) Tracheostomy suctioning

a. Visual inspection of individual at least q 15minutes to determine need for tracheal suctioning based upon:

DODD Assessment Center

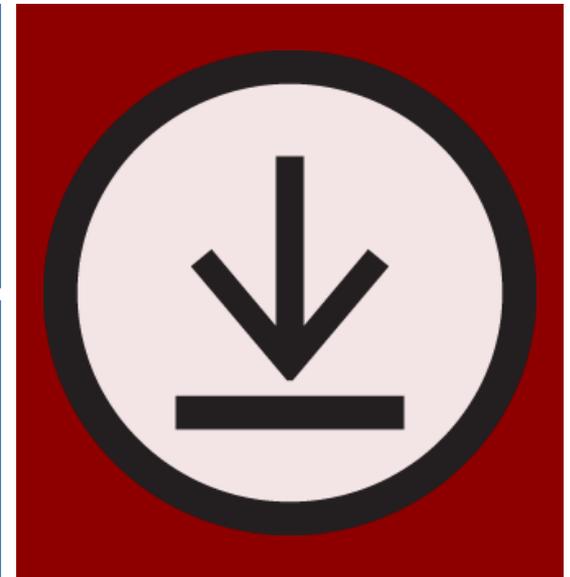
- **Acuity Assessment Instrument (AAI)**
- **Development Disability Profile (DDP)**

DODD Download Drivers

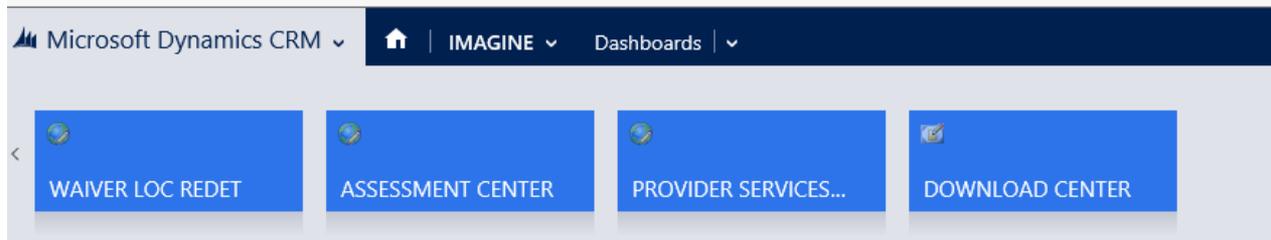


DODD Download Center

Creation of a Download Center	Built on CRM platform	Ability to Download Individual Data	Ability to Download Guardian Data
Includes Fields from Legacy IDS	Includes New Fields from CRM	Includes Eligibility Information	Enhanced Waiting List Download Coming Soon



DODD Download Center



Download Center

DODD Download Center

Select a County

Select Data

DODD Download Center

Download Center

DODD Download Center

Select a County: BELM

Select Data: XML-Individual Data Download

Select Individual Status: Active Terminated Deceased

Download

cnt	File Name	Size	Creation Date
1	 0160831112147.xml	452865	8/31/2016 11:21:48 AM

File Naming convention: The first part is county identifier; the second part of first letter is status with A for Active, D for Deceased and T Terminated and subsequent number is for number of records in the download file; the third part is user code, with which the user generated download file; and the last part is time stamp. (For example: BELM_A0001234_...)

The XML data file is based on the published schema by Division of Information Services, Ohio Department of Developmental Disabilities.

All files will be automatically deleted after 7 days from their creation.

DODD Download Center

- **Reporting county**
- **DODD #**
- **Last name**
- **First name**
- **Middle name**
- **Nick name**
- **Generation**
- **SSN**
- **Medicaid #**
- **Gender**
- **DoB**
- **Race**
- **Ethnicity**
- **Email**
- **Home phone #**
- **Work phone #**
- **Mobile phone #**
- **Primary language**
- **Other language**
- **Primary language at home**
- **Other language at home**
- **Marital status**
- **School district**
- **Address (multiple occurrences)**
 - Street
 - City
 - State
 - Zip code
- Description
- Facility name
- Facility number
- Current living arrangement
- Current living arrangement sub category
- Other living arrangement
- Address type
- Start date
- End date
- **Contact (non-guardian) (multiple occurrences)**
 - Last name
 - First name
 - Contact type
 - Description
- **Residence County**
- **Initial enrollment date**
- **Re-enrollment date**
- **Termination date**
- **LOC determination packet**
 - Status
 - Proposed effective date
- **CB decision tree**
 - Decision
 - Result
 - Determination date
- **Services and supports**
 - Early intervention
 - Pre-school
 - School
 - Supported education
 - Children’s enrichment
 - Adult home services
- Ohio Department of Aging adult support
- Adult day support
- Vocational habilitation
- Group employment supports
- Individual employment supports
- Self-determined supports
- Non-medical transportation
- Supported living
- Service coordination (SSA)
- Family supports
- Payee/money management
- Career discovery
- Career exploration
- Employment/self-employment plan
- Job development
- Self-employment launch
- Worksite accessibility
- Assistive technology assessment
- Benefits education and analysis
- Situational observation and assessment
- Competitive employment
- **Essential health**
 - Intellectual disability
 - Diagnosis (multiple occurrences) category
 - Subcategory
 - Notes
- **Associated county**
 - Associated CB
 - Reason
 - Start date
 - End date

Provider Certification Wizard (PCW)

Recent Changes

- **Rap back Enrollment Tracking**
 - Give the ability to track Rap back enrollment date.
- **Provider MUST Read Splash screen – which calls out the Documents needed in Provider Certification application process.**
 - Whenever provider is submitting an application a splash screen pop ups on Initial Page and Final Page.
- **Give additional functionality for ODA**
 - Renewals, Add-on, Fee Payment {CBOSS} and Admin Functionality. {ODA previous only had ability to do only Initial application}
- **MIT2 – Web service communication between DODD and ODM on Provider Address Maintenance {Address Updates}**
 - On address change on DODD or ODM it is communicated both ways.
 - Data from ODM is received and processed and stored in Provider DB.
 - Risk Level indication is auto updated.

Provider Certification Wizard (PCW)

Recent Changes

- **DD Waiver Nursing service addition.**
 - DD Waiver nursing is for all TDD providers
 - Backfill the data
- **Quick wins – Text changes, Document requirements changes.**
 - Text changes
 - Stop submitting applications until all documents are submitted.
- **New Modified Waiver Services addition.**
 - Add new Modified waiver services
- **Quick wins – Tool tips changes**
 - Tool tips changes.
- **Service Location**
 - Give providers the ability to submit the service location addresses for Adult Day and Vocab Services.

Provider Certification Wizard (PCW)

- **Service Location – Coming 9/29/2016**

Web page title

http://www.url.com

Service Location Information—Provider View

Facility Name *

Address Line 1 *

Address Line 2

City *

State *

Zip *

I provide Non-Facility based services. ? Typically, non-facility based settings have opportunities for people with disabilities to interact with people who do not have a disabilities and are located in the community.

A facility based setting is a fixed service location (any building, campus, or other location) that is owned or leased and operated by the provider where adult day or vocational rehabilitation waiver services are provided on a regular basis.

Suggested Tool Tip: "I provide Adult Day Support and/or Vocational Habilitation in the community, not in facilities"

The csv Upload functionality needs to be removed after October 31, 2016.

Upload setting information: Download a CSV template to submit to DODD with service location information. Do not change the headers on this file. Once you have collected the information in the file, you may upload the CSV on this page. Each provider may upload only one CSV file for data integrity purposes. Once you have completed a one time only upload of the CSV file, you may only change setting information by clicking Edit.

ServiceLocations.csv

Choose File to Upload: No file chosen

Facility Name	Address Line 1	Address Line 2	City	State	Zip	Closed	Edit Access
Demo1	123 Main Street		Columbus	Ohio	43215		<input type="button" value="Edit"/>
Demo 2	567 Apple Street	Suite 200	Baltimore	Ohio	43105		<input type="button" value="Edit"/>
Demo 3	789 Broadway Ave.		Cleveland	Ohio	43125	7/28/15	

5

Provider Certification Wizard (PCW)

- **Service Location – Provider View**

The screenshot shows a web browser window with the title "Service Location Information—Provider View". The browser's address bar shows "http://www.url.com". The form contains several input fields: "Facility Name" (text), "Address Line 1" (text), "Address Line 2" (text), "City" (text), "State" (List of states), and "Zip" (Zip code 5 digits). Each field has a red asterisk indicating it is required. To the right of these fields is a paragraph: "A facility based setting is a fixed service location (any building, campus, or other location) that is owned or leased and operated by the provider where adult day or vocational rehabilitation waiver services are provided on a regular basis." Below the input fields is a checkbox labeled "I provide Non-Facility based services." with a "SAVE" button next to it. To the right of the checkbox is another paragraph: "Typically, non-facility based settings have opportunities for people with disabilities to interact with people who do not have a disabilities and are located in the community." Below this is the "Upload setting information" section, which includes a paragraph of instructions and a "Submit" button. A file upload section shows a checked checkbox for "ServiceLocations.csv" and a "Choose File to Upload:" area with a "Choose File" button, "No file chosen" text, and an "Upload" button. At the bottom, there is a "View" link and a "Delete" link next to "ServiceLocations.csv". A black callout box points to the "Delete" link with the text "Delete will disappear once document submitted." The page number "7" is visible in the bottom right corner.

Web page title

http://www.url.com

Service Location Information—Provider View

Facility Name *

Address Line 1 *

Address Line 2

City *

State *

Zip *

I provide Non-Facility based services. Typically, non-facility based settings have opportunities for people with disabilities to interact with people who do not have a disabilities and are located in the community.

Upload setting information: Download a CSV template to submit to DODD with service location information. Do not change the headers on this file. Once you have collected the information in the file, you may upload the CSV on this page. Each provider may upload only one CSV file for data integrity purposes. Once you have completed a one time only upload of the CSV file, you may only change setting information by clicking Edit.

ServiceLocations.csv

Choose File to Upload: No file chosen

View Delete [ServiceLocations.csv](#)

Delete will disappear once document submitted.

7

Provider Certification Wizard (PCW)

- **Service Location – Admin View**

Web page title

http://www.url.com

Service Location Information—Admin View

Facility Name *

Address Line 1 *

Address Line 2

City *

State *

Zip *

I provide Non-Facility based services.

A facility based setting is a fixed service location (any building, campus, or other location) that is owned or leased and operated by the provider where adult day or vocational rehabilitation waiver services are provided on a regular basis.

Typically, non-facility based settings have opportunities for people with disabilities to interact with people who do not have a disabilities and are located in the community.

Upload setting information: Download a CSV template to submit to DODD with service location information. Do not change the headers on this file. Once you have collected the information in the file, you may upload the CSV on this page. Each provider may upload only one CSV file for data integrity purposes. Once you have completed a one time only upload of the CSV file, you may only change setting information by clicking Edit.

ServiceLocations.csv

Choose File to Upload: No file chosen

Facility Name	Address Line 1	Address Line 2	City	State	Zip	Closed	Edit Access
Demo1	123 Main Street		Columbus	Ohio	43215		
Demo 2	567 Apple Street	Suite 200	Baltimore	Ohio	43105		
Demo 3	789 Broadway Ave.		Cleveland	Ohio	43125	7/28/15	

8

Provider Certification Wizard (PCW)

- Service Location – Super Admin View

Web page title

http://www.url.com

Service Location Information—Super Admin View

Facility Name *

Address Line 1 *

Address Line 2

City *

State *

Zip *

I provide Non-Facility based services. Typically, non-facility based settings have opportunities for people with disabilities to interact with people who do not have a disabilities and are located in the community.

Upload setting information: Download a CSV template to submit to DODD with service location information. Do not change the headers on this file. Once you have collected the information in the file, you may upload the CSV on this page. Each provider may upload only one CSV file for data integrity purposes. Once you have completed a one time only upload of the CSV file, you may only change setting information by clicking Edit.

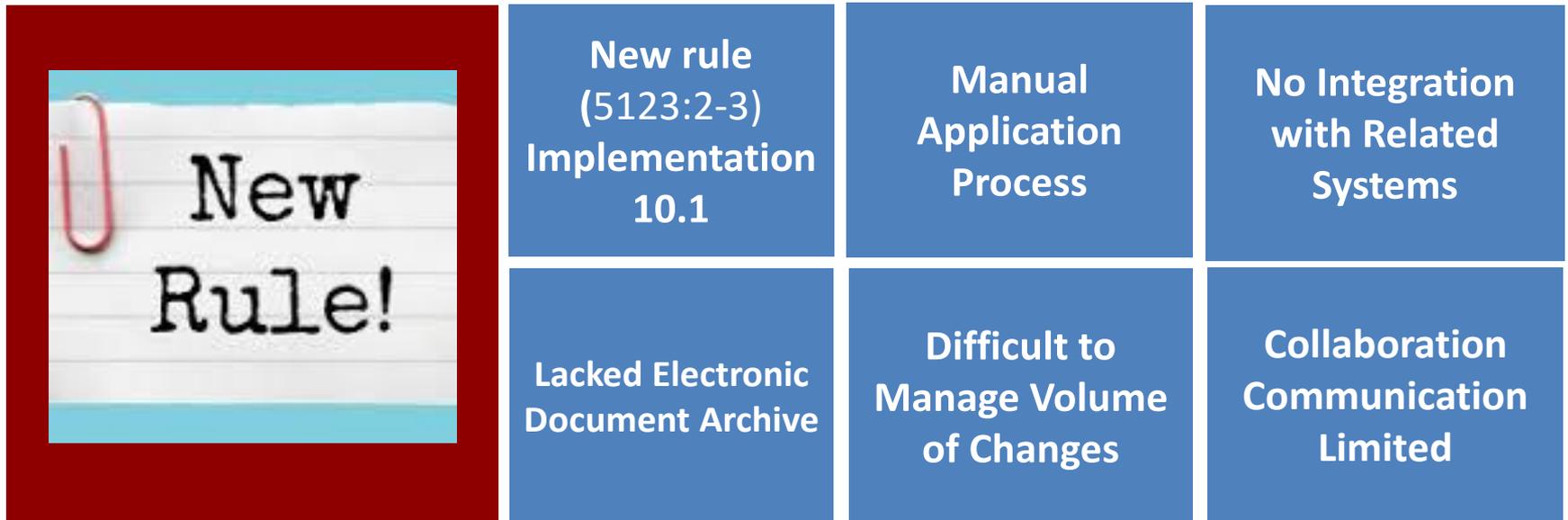
ServiceLocations.csv

When the Delete button is selected show a pop up box with the question "Are you certain you want to proceed with the deletion, once done this cannot be undone."

Choose File to Upload: No file chosen

Facility Name	Address Line 1	Address Line 2	City	State	Zip	Close Date	Edit Access
Demo1	123 Main Street		Columbus	Ohio	43215		Correction, Cancel, Close, Delete
Demo 2	567 Apple Street	Suite 200	Baltimore	Ohio	43105		Correction, Cancel, Close, Delete
Demo 3	789 Broadway Ave.		Cleveland	Ohio	43125	7/28/15	Correction, Cancel, Re-Open, Delete

Facility Licensing Drivers



Provider Services Management (PSM) - Facility Licensing



PSM – Facility Licensing

The screenshot displays the PSM Facility Licensing interface. At the top right, there are navigation links for 'Home' and 'New Facility Location', along with a user profile icon. The main content area is divided into three sections:

- Provider Details:** A table showing provider information.
- Pending Application:** A table showing application details.
- Associated Facility Details:** A table showing facility information.

Name	Provider Type	Vendor Type	License Number	Status	Certification Start	Certification End
[REDACTED]	ICF/ID	Waiver Provider	[REDACTED]	Active	8/12/2014	8/11/2017

App ID	App Status	App Type	Provider Name	Facility Name
1477	Submitted	Renovation	[REDACTED]	[REDACTED] HOME

Facility Number	Facility Name	Facility Status	Facility Last Application	License Number
[REDACTED]	[REDACTED] HOUSE	Open		[REDACTED]
	[REDACTED] HOME	Open	1477	[REDACTED]

Provider land on home page as below (upon successful login)

- a. Provider details
- b. Pending Applications
- c. Facilities provider owns

PSM – Facility Licensing

Provider clicks on facility number from the list of facilities

The screenshot displays the PSM Facility Licensing web application interface. At the top, there are navigation links for 'Home' and 'New Facility Location'. The main content is divided into four sections:

- Facility Information:** Shows details for a facility with the name 'HOUSE'. Fields include Facility Number, Status (Open), Current Capacity, Licensed By (Department of Developmental Disabilities), and Funding Source (Non-Waiver). A 'Contact Information' section below lists fields for Contact First Name, Contact Last Name, Address, City, State (OH), County, Zip Code, Phone Number, Fax Number, and Email.
- License Information:** Shows Contract Number, Contract Name, Status (Active), and Certification Dates (10/2/2014 - 10/1/2017). A 'Contact Information' section lists fields for CEO First Name, CEO Last Name, Address, City, State (OH), County, Zip Code, Phone Number, Fax Number, and Email.
- Facility Managed Staff:** A table listing staff members with columns for Name, Position, Address, Email, Start date, and End date.

Name	Position	Address	Email	Start date	End date
[Redacted]	Verified Management Contractor	[Redacted]	[Redacted]	6/9/2014	12/31/9999
[Redacted]	Administrator	[Redacted]	[Redacted]	8/1/1994	12/31/9999
- Action Items:** A grid of buttons for various actions: Closure (request to Put Beds on Hold, Relinquish beds), Change of Capacity (increase or decrease Beds on Hold, Active beds), Change of Ownership (desseminate beds), Renovation (request Renovation to a Facility), Conversion of Application (convert Beds), Change of Administrator / Operator (change Administrator / Operator), and Facility Relocation (relocate to a new/existing facility).

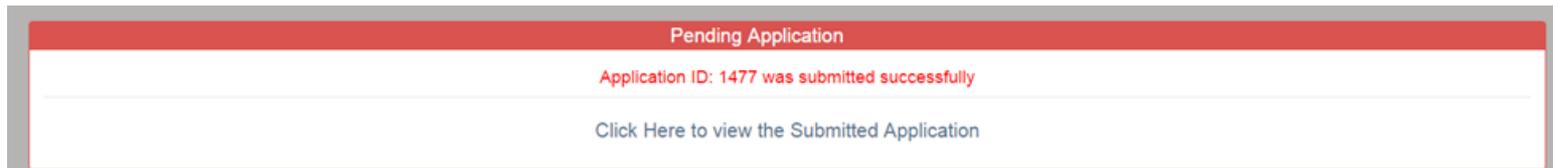
PSM – Facility Licensing

Clicking on closure application displays

The screenshot displays the PSM Facility Licensing web application interface. At the top right, there are navigation links for "Home" and "New Facility Location". A dark red header bar contains a "Facility Information" tab, which is currently selected. Below this, there are two more tabs: "License Information" and "Facility Managed Staff". The main content area is titled "Closure Application" and features a red warning message: "Closure Request must apply 60 days Prior to Proposed Closure Effective Date". The form includes a date input field for "Proposed Effective Date for Closure:" with a placeholder "mm/dd/yyyy". Below this are two radio button questions: "Is the Facility Vacant?" and "Is the Facility Capital Funds Investment?", both with "Yes" and "No" options and a note that "One of the options need to be selected". A blue-bordered box titled "Disposition of Beds" contains four input fields: "Current Capacity:" (with the value "5"), "Closure Bed(s) on Hold:", "Closure Bed(s) Relinquish:", and "Total Number of Closing Bed(s):". At the bottom of the form are "Cancel" and "Submit" buttons.

PSM – Facility Licensing

Provider fills the information and will be prompted on successful submission



When a Provider clicks on Sign Out, the provider will be logged out



Login for County Boards, Providers, and DODD Central Office



The submitted application can be viewed in CRM by DODD internal staff.

Upcoming Initiatives

WMS Rewrite

- **Retirement of Individual Demographic System (IDS) with redesign of the systems: Waiting List, PICT**

CBCR

- **Online Submission of County and COG Cost Reports**

Employment First

Break

8:45 – 9:00 AM	Welcome
9:00 – 9:15 AM	Director John Martin
9:15 – 9:30 AM	DODD ITS General Updates – Michelle Burk, Deputy Director/CIO
9:30 – 9:50 AM	Microsoft Dynamics CRM Platform
9:50 – 10:15 AM	Level of Care/Ohio Benefits
10:15 – 10:30 AM	Break
10:30 – 12:00 PM	imaginelS
12:00 – 1:00 PM	Lunch
1:00 – 1:40 PM	Secure Entitlement Management System
1:40 – 2:25 PM	Upcoming DODD ITS Initiatives
2:25 – 2:40 PM	Break
2:40 – 3:10 PM	Review Data System/Restrictive Measures Notification
3:10 – 3:25 PM	State of Ohio Resources
3:25 – 3:30 PM	Wrap-up



Review Data System (RDS) Drivers



System not Meeting
Business Needs

No Scalability

Poor Performance

No Collaboration

Review Data System (RDS) Solution

**Leveraged CRM
Platform**

**Electronic
Document
Management**

**Better Admin
Capabilities**

**Allows Reviewers to
Interact with
Providers in a
Collaborative Model**

**Dedicated Portal
for Providers**

**Better System
Integration**



Review Data System

Microsoft Dynamics CRM | HOME | IMAGINE | Dashboards | Create | Kalyani Tho imagineqa1

REVIEW DATA SYSTEM | SETTINGS | FINANCE MANAGEME... | WAIVER LOC REDET | PROVIDER SERVICES... | DOWNLOAD CENTER

RPS2 Dashboard

LOCs pending for review - Waiver

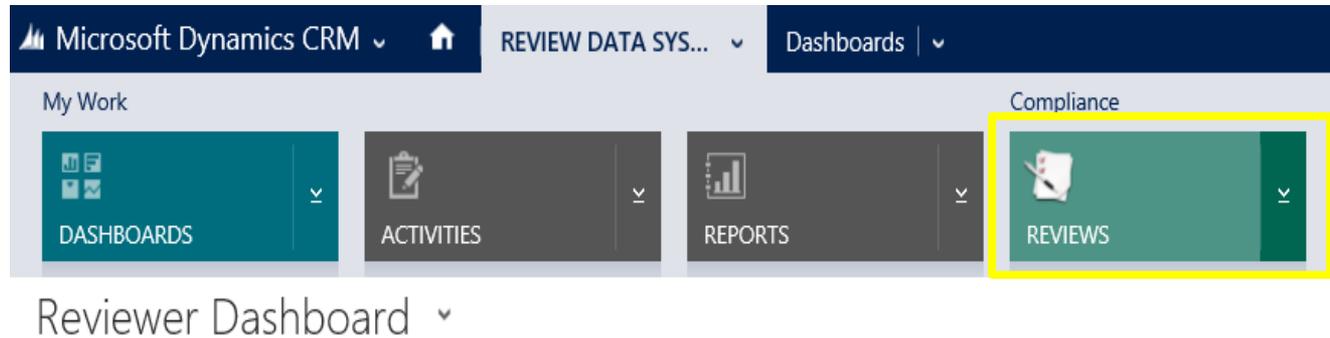
Search for records

DODD# (Individual)	Full Name (Individual)	Request Type (LOC M...	LOC Reason ↓	LOC Status (LOC)	LOC Determination Statu...	Submitted Date (LOC)	County	Created On ↓
6410093	Aidan Wirfel	Change of Condi...	Waiver	Submitted	Ready for Review	9/15/2016	CUYA	9/15/2016 12:57 PM
4991102	Gary Strum	Change of DODD...	Waiver	Submitted	Ready for Review	9/1/2016	COLU	9/1/2016 1:13 PM
8502016	Gerald Griffin	Initial	Waiver	Submitted	Ready for Review	8/17/2016	FRAN	8/17/2016 10:48 AM
6620819	Mary Lucas	Initial	Waiver	Submitted	Ready for Review	8/16/2016	OTTA	8/16/2016 12:15 PM
7000195	SELPtest No_AAI	Initial	Waiver	Submitted	Ready for Review	8/12/2016	FRAN	8/12/2016 2:11 PM
6173046	Dewan Glover	ICF/DC to Waiver	Waiver	Submitted	Ready for Review	8/8/2016	CUYA	8/8/2016 7:46 AM
6585132	JERI WARTENBERG	ICF/DC to Waiver	Waiver	Submitted	Ready for Review	7/27/2016		7/27/2016 12:15 PM
9531653	Aaron Elman	ICF/DC to Waiver	Waiver	Submitted	Ready for Review	7/26/2016	FRAN	7/26/2016 1:35 PM

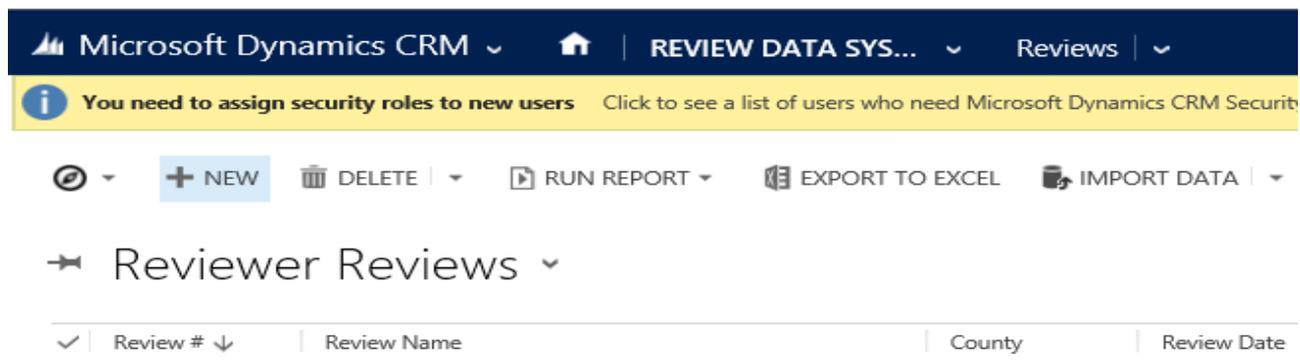
1 - 8 of 3255

Review Data System

Click on **Reviews**



Click on the **New** button



Review Data System

Click on **Reviews** and enter Provider Info

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM', a home icon, 'REVIEW DATA SYS...', and 'Dashboards'. Below this, there are two main sections: 'My Work' and 'Compliance'. The 'My Work' section contains 'DASHBOARDS', 'ACTIVITIES', and 'REPORTS'. The 'Compliance' section contains 'REVIEWS', which is highlighted with a yellow box. Below the navigation bar, there is a 'Reviewer Dashboard' section. The main content area is titled 'REVIEW : INFORMATION' and shows a progress bar with four stages: 'Planning (Active)', 'Field Review', 'Citations', and 'Completed'. Below the progress bar, there is a section for 'Review Specific Information' with three columns: 'Review Information', 'Provider Information', and 'Review Communication Activity'. The 'Review Information' column lists fields like Provider, Facility, County, Review Type, Review Format, Review Notification Date, Reviewer, Group Manager, DODD Group Manager, Review Date, and Review Location. The 'Provider Information' column lists fields like Company Name, Certification #/Contr, Provider Certified, Provider Type, Operates Licensed F, Ready To Send 90 D, and Contact (Review). The 'Review Communication Activity' column shows 'ACTIVITIES' and 'NOTES' with options like 'Add Phone Call', 'Add Task', and a menu icon.

Microsoft Dynamics CRM | REVIEW DATA SYS... | Dashboards

My Work | Compliance

DASHBOARDS | ACTIVITIES | REPORTS | **REVIEWS**

Reviewer Dashboard

REVIEW : INFORMATION

Review # | Reviewer

RVW181

Planning (Active) | Field Review | Citations | Completed

Review Specific Information

Review Information	Provider Information	Review Communication Activity
Provider*	Company Name*	ACTIVITIES NOTES
Facility*	Certification #/Contr	All Add Phone Call Add Task ...
County*	Provider Certified*	
Review Type*	Provider Type*	
Review Format*	Operates Licensed F	
Review Notification Date	Ready To Send 90 D	
Reviewer*	Contact (Review)	
Group Manager*		
DODD Group Manager		
Review Date		
Review Location		

Review Data System

Complete the Individual Review and Provider Tools

🔍 SAVE ADD SERVICES ADD INDIVIDUAL SAMPLE SAVE & CLOSE + NEW DEACTIVATE ...

REVIEW - INFORMATION

[Redacted]

Review #
RVW389

Reviewer*
EdRevie



✓ Status Reason* In Progress

Review Specific Information

Staff Sample Key

Staff #	Full Name ↑	Date of Hire	Job Title
---------	-------------	--------------	-----------

No Staff Review records found.

Individual Review Tool

Name	Individual #	Individual Waiver Type ↑	LivingArrangementCateg...	Review Tool Co...
[Redacted]	ID2	IO		No
[Redacted]	ID1	No Waiver	ICF / IID	No

Provider Review Tool

Active Provider Review Questio... ▾

Search for records 🔍

Question # ↑	Section	Sub Section	Question	Rule Reference	Guidance (Question Ref)	Answer	Explanation	Provider Citatio...	Immediate Citat...	Co
2.001	Core Questions	Service Planni...	Does the service plan address the individual's assess...	42228.45972	Guidance: This may include needs in the areas belo...	Non Compliant	Thisisa teest	Yes	No	No

Review Data System

There is an opportunity to add Citations.



If no Citations, the review is complete.

REVIEW : INFORMATION

testkalimagency - DARK - 2016

Review # RVW389 | Reviewer EdReview N | Fa



- ▶ Review Specific Information
- ▶ Citation
- ▶ POC Verifications

Question (POC)	Citation (POC)	Due Date	Scheduled Date...	Completion Dat...	# Of Attempts	Modified On
----------------	----------------	----------	-------------------	-------------------	---------------	-------------

No POC Verification records found.

Review Data System

Once you have logged in, your dashboard will appear. Here you can review who is authorized as a delegate for your reviews, check the status of your reviews, manage who is a delegate for your review, and much more.

CEO Dashboard for Brian Blend

Delegates Note: If you wish not to have delegates, please create yourself as a delegate and assign as a review contact. Search:

Last Name	First Name	E-mail	Phone	Submits POC	Manage
[REDACTED]	[REDACTED]	[REDACTED]	614-614-6144	<input checked="" type="checkbox"/>	Edit
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	Edit
[REDACTED]	[REDACTED]	[REDACTED]	5555555555	<input checked="" type="checkbox"/>	Edit
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	Edit
[REDACTED]	[REDACTED]	[REDACTED]	6145555555	<input checked="" type="checkbox"/>	Edit
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	Edit

Showing 1 to 6 of 6 entries Previous Next

Compliance Reviews Note: Please click on the "blue" review name to see your report

Review Number	Review Name	County	Facility	Review Date	Review Status	Reviewer	Review Type	Review Contact Required	Required Docs
RW1287	Acree Daily - FRAN - 2016	FRAN			First Notification Sent	Fran 8	Regular	--Assign Contact--	Docs

Facilities

Show 10 entries Search:

© Copyright 2016. All Rights Reserved ICE MPN Delenator

RDS – Create Delegate

Create A Delegate

Use the **Create Delegator** function
CEO and Independent provider must create themselves as a delegate

A screenshot of the 'Create Delegator' form on the Belmont Facilitator website. The form includes the following fields:

- First Name: John
- Last Name: Doe
- E-mail: johndoe@gmail.com
- Phone: 6142315722
- Submits POC: (checked)

Below the form is a checkbox labeled 'Submit POC gives ability to work on Reviews' and a blue 'Create' button.

Enter:

First Name

Last Name

Email address

If applicable check Submits POC
then Create button

RDS – Assign a Delegate

Use the drop down box to find the delegate you want as the review contact.

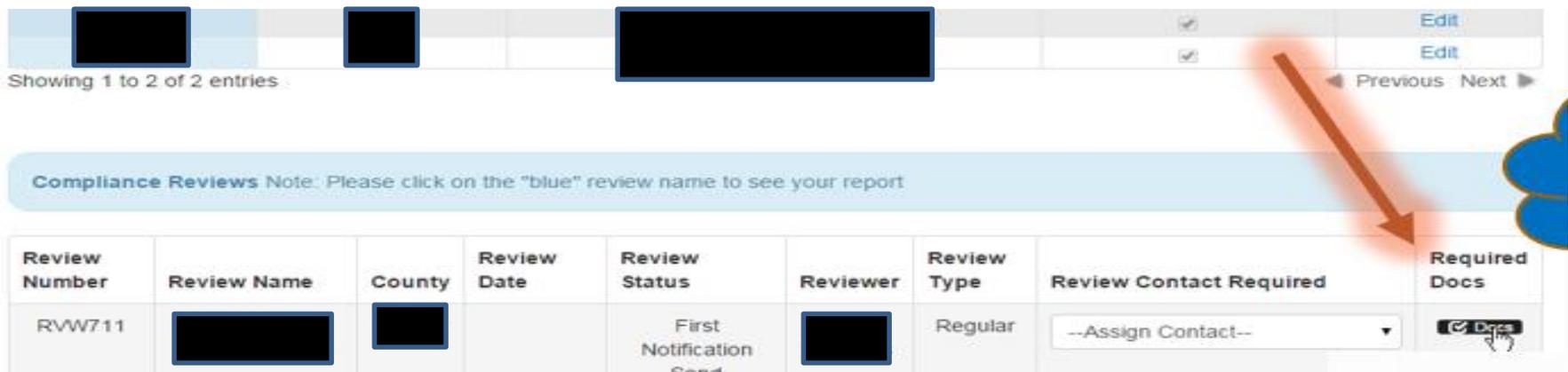
Showing 1 to 3 of 3 entries

Compliance Reviews Note: Please click on the "blue" review name to see your report

Review Number	Review Name	County	Review Date	Review Status	Reviewer	Review Type	Review Contact Required	Required Docs
RVW711	[Redacted]	[Redacted]		First Notification Send	[Redacted]	Regular	--Assign Contact--	<input checked="" type="checkbox"/> Docs
RVW713	[Redacted]	[Redacted]	12/17/2015	Ready To Complete	[Redacted]	Special	[Redacted]	<input checked="" type="checkbox"/> Docs
RVW796	[Redacted]	[Redacted]	1/13/2016	Pending For POC	[Redacted]	Special	--Assign Contact--	<input checked="" type="checkbox"/> Docs

RDS – Compliance Review

Providers will be able to view their compliance reviews – Date, Review contact, review status, sample key(s), and access the required documents list.



Showing 1 to 2 of 2 entries

Compliance Reviews Note: Please click on the "blue" review name to see your report

Review Number	Review Name	County	Review Date	Review Status	Reviewer	Review Type	Review Contact Required	Required Docs
R\W711	[REDACTED]	[REDACTED]		First Notification Sent	[REDACTED]	Regular	--Assign Contact--	

RDS – Required Documents List

AGENCY REQUIRED DOCS LIST

1 / 4

AGENCY REQUIRED DOCUMENTS LIST

Below is a list of documents that will be reviewed during the compliance review, please have these items available at the beginning of the onsite review. Additional documents may be requested during the onsite review. Depending on the type of waiver and services provided some items will not apply to the review. Please contact the reviewer with any questions prior to the onsite review.

ISP for Individuals in Sample	Completed
1. Current and previous service plan, including addendums/revisions	
2. Plan of Care signed by physician for TDD Waiver Nursing	
MEDICATION ADMINISTRATION for Individuals in Sample	
3. Current Self-Medication Assessment	
4. Medication Administration Records (MAR) for the last 3 months	
5. Physician's orders	
6. Name and credentials of the nurse- for Delegated Nursing and TDD Nursing only	
FOR DELEGATED NURSING:	
7. Evidence of nurse supervision of delegation <ul style="list-style-type: none"> A. Log Notes B. Nursing Notes C. Any documentation used by delegating nurse to evidence supervision 	

RDS – After Compliance Review

Compliance Report: Review status should show as Pending for POC or Complete.

Compliance Reviews Note: Please click on the "blue" review name to see your report

Review Number	Review Name	County	Review Date	Review Status	Reviewer	Review Type	Review Contact Required	Required Docs
RW531	[REDACTED]	[REDACTED]	12/31/2015	Pending With Manager	[REDACTED]	Regular	[REDACTED]	
RW574	[REDACTED]	[REDACTED]	1/29/2016	Complete	[REDACTED]	Regular	[REDACTED]	

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**WHAT TO DO WHEN THE STATUS
READS "PENDING FOR POC"**



RDS – Review Details

Total Cites 2
Pending 2
Pending Approval 0
Denied 0
Approved 0
Appeared 0
Rescinded 0

Citations
Individual Sample Key
Staff Sample Key
POCV

Please Submit POC(s) to reviewer

#Question	Question	Explanation	Plan of Correction	POC Status	Reviewer Comments
8.018	Did the provider/County Board maintain a log of unusual incidents which includes: - Name of Individual - Description of ... Read more	The provider failed to maintain an unusual incident log.	<input type="radio"/> Appeal <input type="radio"/> POC		
9.014	Did the agency provider verify that the staff person has a high	Staff JF1 does not have either a high school diploma or GED	<input type="radio"/> Appeal <input type="radio"/> POC		

RDS – Citations

Note: A POC or appeal must be written for each citation before you can select submit.

Citations Individual Sample Key Staff Sample Key POCV

Please Submit POC(s) to reviewer

#Question	Question	Explanation	Plan of Correction	POC Status	Reviewer Comment
8.018	Did the provider/County Board maintain a log of unusual incidents which includes: • Name of Individual • Description of ... Read more	The provider failed to maintain an unusual incident log.	<input type="radio"/> Appeal <input type="radio"/> POC		
9.014	Did the agency provider verify that the staff person has a high	Staff JF1 does not have either a high school diploma or GED	<input type="radio"/> Appeal <input type="radio"/> POC		

RDS – Writing Appeal

- Should include a written statement with attached supporting documentation
- Providers should save after each response
- All responses can be edited prior to submitting POC

Total Cites 2 Pending 2 Pending Approval 0 Denied 0 Approved 0 Appealed 0 Rescinded 0

Individual Sample Key Staff Sample Key POCV

Submit POC(s)

Question	Explanation	Plan of Correction	POC Status	Reviewers Comments/History
Did the provider/County Board maintain a log of unusual incidents which includes: • Name of Individual • Description of ... Read more	The provider failed to maintain an unusual incident log.	<input checked="" type="radio"/> Appeal <input type="radio"/> POC <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;">I had an unusual incident log but the reviewer missed it.</div> <div style="text-align: right;"><input type="button" value="Save"/></div>		

RDS – Attachments

Citation Report : 172

Plan of Correction	POC Status	Reviewers Comments/History	Attachments
<p><input checked="" type="radio"/> Appeal <input type="radio"/> POC</p> <p>I had an unusual incident log but the reviewer missed it.</p> <p>Save</p>	<p>Pending</p>		<p> (0) Attachments</p>

To Add Attachments, click paper clip

Choose the location of your attachment

Add Attachment(s)

Select file(s) to upload:

No file chosen

No file chosen

No file chosen

List(s) of files attached.

- Currently there is no attachments available to this plan of correction

If you wish to add more than 3 attachments, Please follow the steps below:

1. First add 3 attachments

RDS – After POC Submitted

The screenshot displays the Ohio Department of Developmental Disabilities (DODD) RDS system interface. At the top, there is a navigation bar with the 'Ohio' logo and 'Department of Developmental Disabilities' text. A user profile for 'Brian Blend' is visible in the top right. Below the navigation bar, a blue header contains the 'imagine' logo and menu items: Home, Individuals, Agreements, Bill of Rights, Due Process, and Guardian Reports. The main content area is titled 'Review Details' and features a card for 'Acree Daily - FRAN - 2016' with an information icon and a 'Fran 8' label. Below the card title, a status bar shows counts for various review stages: Total Cites (0), Pending (0), Pending Approval (0), Denied (0), Approved (0), Appealed (0), and Rescinded (0). At the bottom, there are tabs for 'Citations', 'Individual Sample Key', 'Staff Sample Key', and 'POCV'.

RDS – Approved POC

Review Details



[Redacted]

i

Total Cites **3**
Pending **0**
Pending Approval **0**
Denied **0**
Approved **2**
Appealed **0**
Rescinded **1**

[Citations](#)
[Individual Sample Key](#)
[Staff Sample Key](#)
[POCV](#)

Citation Report: 

Your POC has been approved and no further submissions will be accepted. Click on the pdf to view your report as it will appear on DODD's Provider Search website.

#Question	Question	Explanation	Plan of Correction	POC Status	Reviewers Comments/History	Attachments
17.002	If the provider is responsible for providing any type of transportation do all vehicles used to transport individuals ap ...Read more	Witchy Poo's broom was not equipped with a seat belt or doors.	<input type="radio"/> Appeal <input checked="" type="radio"/> POC <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> Witchy Poo's broom is street legal and you are not allowed to judge! </div>	Rescinded		
7.005	Does the waiver service delivery documentation for all waiver billing codes include the group size in which the services ...Read more	Group size was not included on the HPC service delivery forms for October-December 2015.	<input type="radio"/> Appeal <input checked="" type="radio"/> POC <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> I will add Group size to all documentation and train staff to complete daily. Will be completed by 10/30/15 © Copyright 2015. All Rights Reserved. </div>	Approved		

RDS – Reviewer Comments

A reviewer's comments are viewable by clicking the comment bubble.

The status of the citation and the attachment are also viewable.

Reviewers Comments / POC History

Question#: 8.018

Question: Did the provider/County Board maintain a log of unusual incidents which includes: • Name of Individual • Description of Incident • Identification of Injuries • Time/Date of Incident • Location of Incident • Preventative Measures 5123:2-17-02

Explanation: The provider failed to maintain an unusual incident log.

Date of Submission	POC Status	Provider Comments	Reviewer Comments	Attachments
12/16/2015 2:55:26 PM	Rescinded	We do have a UI log but the reviewer missed it. It is attached.	This citation will be rescinded as evidence of the UI log was submitted.	Unusual Incident Log.xls

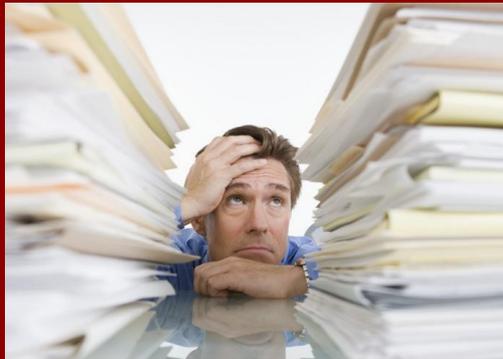


Citation Report: 

Search on DODD's Provider Search website.

POC Status	Reviewers Comments/History	Attachments
Rescinded		
Approved		

Restrictive Measures Drivers



Manual Paper Process

Updating/sharing Plan Information was Difficult

Difficult to View Plans

Reporting on Behavior Plans Limited

Process Lacked Consistency

Restrictive Measures Notification Solution

Leveraged as a Proof of Concept Alongside the Level of Care Rollout in June 2015

Full Implementation in March 2016

Central Repository with Consistent Information Collection

Some Integrations with imagineIS



RMN – Business Testimonial

“...Our former process was antiquated & time consuming for both state & local folks... our local partners would have to notify DODD of a Restrictive Measure Notification by completing a paper form & scanning it to the dept.

Once DODD received it, it would then need to be entered into an excel spreadsheet & the internal data team had limited ability to analyze data.

The application allows for a much more efficient & compressive system for both DODD & local partners. Local partners have the ability to see individual data, and they can also run a series of 12 reports (types of restrictions, locations, length, etc) for their county. This allows them to be able to get a better snapshot of what is happening with folks in their county...”

Tina Evans, Project Manager

Policy & Strategic Direction, DODD

RMIN

Microsoft Dynamics CRM

RESTRICTIVE MEAS... Restrictive Measure...

Create

Kalyani Thota
imagineq1

CASE NOTE

IDS

IMAGINE

ISP

PORTALS

RESOURCE CENTER

RESTRICTIVE MEASUR...

REVIEW D

Individual	Authors Position Title ↑	Created On	Projected Implementation...	Projected Expiration Date	Status	CBDD	Reporting Count...
John Stark	Behavior Support	8/19/2016 9:34...	2/10/2016	2/9/2017	Submit	Yes	FRAN
Gage Parrish	Behavior Support Manager	8/19/2016 10:28...	2/23/2016	10/16/2016	Draft	Yes	DARK
ROBERT SEATON	Behavior Support Specialist	7/7/2016 11:39...	1/28/2016	9/28/2016	Draft	Yes	LAKE
Aubrey Brogdon	Behavior Support Specialist	7/14/2016 1:06...	1/8/2016	9/28/2016	Submit	Yes	ASHT
ROBERT SEATON	Behavior Support Specialist	7/14/2016 1:14...	1/28/2016	9/28/2016	Submit	Yes	LAKE
Frederick Allen	Behavior Support Specialist	7/14/2016 1:20...	1/27/2016	1/26/2017	Submit	Yes	WARR
RICHARD METZ	Behavior Support Specialist	8/19/2016 12:38...	5/9/2016	5/9/2017	Submit	Yes	ASHT
JAMES NUCCITELLI	Behavior Support Specialist	8/19/2016 12:48...	5/9/2016	5/9/2017	Draft	Yes	ASHT
JAMES NUCCITELLI	Behavior Support Specialist	8/24/2016 8:13...	5/9/2016	5/9/2017	Submit	Yes	ASHT
Karen Woltz	Behavior Support Specialist	4/8/2016 3:35 PM	4/4/2016	4/2/2017	Submit	No	FAIR
Karen Woltz	Behavior Support Specialist	4/8/2016 3:38 PM	4/4/2016	4/2/2017	Submit	No	FAIR
A Cassidy	Dev	5/16/2016 1:48...	5/23/2016	9/11/2016	Submit	Yes	SCIO
Matrix Revo	dev	5/16/2016 4:38...	5/17/2016	9/11/2016	Submit	Yes	KNOX

Click the **New** button

Microsoft Dynamics CRM | RESTRICTIVE MEAS... | Restrictive Measure... |

You need to assign security roles to new users Click to see a list of users who need Microsoft Dynamics CRM Security Roles. [Assign Roles](#)

+ NEW DELETE EMAIL A LINK RUN REPORT EXPORT TO EXCEL IMPORT DATA

Active Restrictive Measures Notifi...

✓	Individual	Authors Position Title ↑	Created On	Projected Implementation...	Projected Expiration Date	Status	CBDD	Reporting Count...
	John Stark	Behavior Support	8/19/2016 9:34...	2/10/2016	2/9/2017	Submit	Yes	FRAN
	Gage Parrish	Behavior Support Manager	8/19/2016 10:28...	2/23/2016	10/16/2016	Draft	Yes	DARK
	ROBERT SEATON	Behavior Support Specialist	7/7/2016 11:39...	1/28/2016	9/28/2016	Draft	Yes	LAKE
	Aubrey Brogdon	Behavior Support Specialist	7/14/2016 1:06...	1/8/2016	9/28/2016	Submit	Yes	ASHT
	ROBERT SEATON	Behavior Support Specialist	7/14/2016 1:14...	1/28/2016	9/28/2016	Submit	Yes	LAKE
	Frederick Allen	Behavior Support Specialist	7/14/2016 1:20...	1/27/2016	1/26/2017	Submit	Yes	WARR
	RICHARD METZ	Behavior Support Specialist	8/19/2016 12:38...	5/9/2016	5/9/2017	Submit	Yes	ASHT
	JAMES NUCCITELLI	Behavior Support Specialist	8/19/2016 12:48...	5/9/2016	5/9/2017	Draft	Yes	ASHT
	JAMES NUCCITELLI	Behavior Support Specialist	8/24/2016 8:13...	5/9/2016	5/9/2017	Submit	Yes	ASHT
	Karen Woltz	Behavior Support Specialist	4/8/2016 3:35 PM	4/4/2016	4/2/2017	Submit	No	FAIR

RMN

Enter the new individual RMN information

🔍 SAVE SAVE & CLOSE + NEW ✎ EDIT PROCESS 📄 FORM EDITOR

RESTRICTIVE MEASURES NOTIFICATION : INFORMATION

New Restrictive Measures Notification



Active(Draft) (Active)

ACTIVE(SUBMIT)

Personal Information:

Individual *	Date of Birth
<input type="text"/>	--
County of Service:	Status
--	Draft

Behavioral Support Strategies Developed By:

First Name *	Last Name *	Agency Name *
--	--	--
Phone *	Author's Position Title *	Email *
--	--	--
Select Author Agency Type *		
--		

Type of Behavioral Support Strategy with Restrictive Measures:

RMIN

🔍 SAVE 📄 SAVE & CLOSE + NEW 🖨️ PRINT SUMMARY 🚫 DEACTIVATE 🗑️ DELETE ...

RESTRICTIVE MEASURES NOTIFICATION : INFORMATION

AugEight Test



Active(Draft) (Active)

ACTIVE(SUBMIT)

✓ Individual AugEight Test

General

Personal Information:

Individual *

AugEight Test

County of Service:

BELM

Date of Birth

1/1/2000

Status

Draft

Submit

Behavioral Support Strategies Developed By:

First Name *

testkal

Phone *

(235) 325-3552

Select Author Agency Type *

County Board

Last Name *

testkal

Author's Position Title *

test

Agency Name *

testkalagency

Email *

test@test.com

RMN

Once the individual RMN is saved, you can create new Target Behaviors

TARGETED BEHAVIOR :

Target Behavior ↑

No Target Behavior records found.

DU tec ... New Target Behavior ... imaginegal

SAVE & CLOSE FORM EDITOR

TARGET BEHAVIOR : INFORMATION

New Target Behavior

General

Target Behavior(s); Choose one:

Physical Aggression To	<input type="checkbox"/>	Self-Injurious	<input type="checkbox"/>	Transportation Safety	<input type="checkbox"/>	Stealing	<input type="checkbox"/>
Sexual Offending	<input type="checkbox"/>	Other	<input checked="" type="checkbox"/>	Other Specify*	test		

Location for Target Behavior Selected; Choose any that apply:

Home	<input checked="" type="checkbox"/>	Work	<input type="checkbox"/>	Community Employment	<input type="checkbox"/>	Sheltered Workshop	<input type="checkbox"/>
Adult Day Program	<input type="checkbox"/>	Volunteer Opportuni	<input type="checkbox"/>	Community Event	<input type="checkbox"/>	School	<input type="checkbox"/>
Respite	<input type="checkbox"/>	Camp	<input type="checkbox"/>	Summer Program	<input type="checkbox"/>	Hospital	<input type="checkbox"/>
Restaurant	<input type="checkbox"/>	Shopping Store	<input type="checkbox"/>	Vehicle	<input type="checkbox"/>		
Other	<input type="checkbox"/>						

Restrictive Measure for Target Behavior Selected; Choose any that apply:

Manual	<input checked="" type="checkbox"/>	Mechanical	<input type="checkbox"/>	In Designated Time Out (TO) Room	<input type="checkbox"/>
Chemical	<input type="checkbox"/>	Rights Restriction	<input type="checkbox"/>		

Manual Restrictive Measure :

Manual Description	<input type="checkbox"/>	Court Ordered	<input type="checkbox"/>
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Active

State of Ohio Resources for State, County, and Local Government

Data Center Co-Location

Enterprise Contracts like Dell, HP, and Microsoft

Voice over IP

For more information, visit the [State of Ohio IT Service Catalog](#).



Closing Comments



Pookie watching TV



THE END