

FINANCE MANAGERS

1. Does imaginelS interface with CPT, MSS, and/or PAWS?
Under the current version of imaginelS, CPT, MSS, and PAWS do not interface with Imagine
2. How is "Revise" on a Service Summary Funding Request used? The "Revise" button Resets the service summary back to Draft and secondly allows for modification of the selected service listing.
3. How do we change a service summary once it is approved by the Finance Manager?
The "Revise" Button is available to modify a service summary after costing has been performed and prior to Funding Approval. Once Funding has been approved and there is a need to modify the service summary, the BSS or Finance Manager can click the "RESET TO DRAFT" button to modify the service summary.
4. What is the financial workflow associated with Local Service Listings?
 - FM Creates a Fiscal Year (budget span)
 - FM Creates a Local Funding Source
 - FM Creates a County Fund Source Allocation
 - FM Creates a non-waivered Local Provider
 - FM Creates Local County Service Rates / Local Provider Service Rates
 - FM Associates Local County / Provider Rates to County Fund Source Allocation
 - FM Associates Local Services with Providers
 - SSA Creates a new Service Listing to support an Outcome.
 - SSA Selects the "Cost Projection Needed" button to request Costing from the BSS.
 - BSS Receives a notification that "Cost Projection Needed"
 - BSS selects the "Request Funding Approval" Button sending Task notification "Financial Approval Requested" to the FM
 - FM Selects Service Summary Pending Approval.
 - If FM Approves Request, FM will select "Approve Request Button" to complete approval process
 - If FM Does not approve Request, FM will Select Revise button to Reset Back to Draft