



Finance Manager

Description

This Finance Manager training will instruct county board members responsible for creating and approving funds and the process to setup, maintain, and approve Finance Management Role activities within *imaginIS*. Training will take place in a dedicated training environment, after which the newly gained skills will be applied to the production environment using real cases.

Who should attend?

Anyone responsible for setting up/managing county budgets and approving spending as related to services that support those with developmental disabilities.

Prerequisite:

Familiarity with the Person Centered Principles concepts championed by Ohio DODD
Familiarity with CRM Navigation
Comfortable operating a personal computer and mouse.
Familiarity with internet browser

Agenda

Training Perpetration

Real Cases and/or financials to enter into the live *imaginIS* environment

Introduction

Register, Introductions, System Checks
imaginIS Overview
CRM and *imaginIS* Navigation
Finance Manage Role Overview
Processes – Overview Roles and Date Ranges
Relationship – Primary CRM Role Relationships
Dashboards – Financial Approval Dashboard

SSA Supervisor

Assign Direct Reports
Assign SSA to Individual

FM County Creation

Create a Fiscal Year
Create a County Fund Source
Create a County Fund Source Allocation
Create and Invite a New Local Provider to *imaginIS*
Create a Local Service Price Listing (County Rate & Provider Rate)

FM County Setup and Maintenance

Associate a Local Provider Service to a Fund Source Allocation
Assign a local Service for Maintenance to you or a team member
Approve/Deny Funding Requests
Send Notifications the Funding Request is approved
How to review the remaining balance fund source allocation