



Department of
Developmental Disabilities



imaginelS
Implementation and
Change Management Project

Service Support Administrator Supervisor
Guide

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Setting Direct Reports

The SSA supervisor has the ability to assign or re-assign to themselves, direct reports.

1. Sign in to *imaginIS* as SSA Supervisor
2. Click on the Microsoft Dynamics icon in the navigation bar
3. Click on the Settings Tile

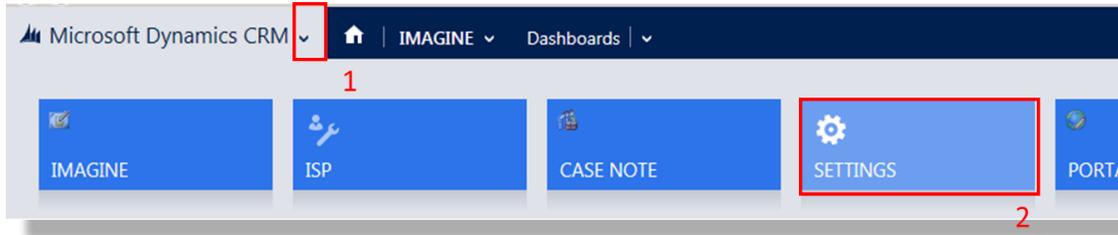


Figure 1 – Initial Menu Settings

4. Select the SETTINGS drop down in the blue ribbon
5. Click on the ADMINISTRATION Tile
6. Click on the Users Link

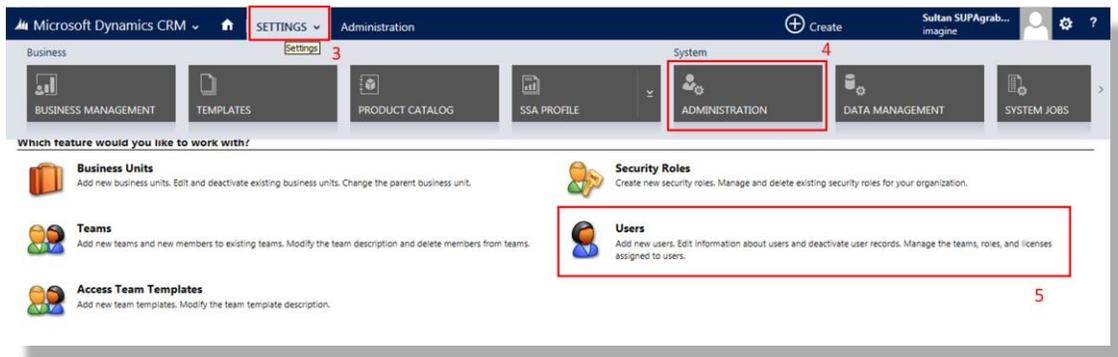


Figure 2 – Select User

7. Enter the User Name of the SSA in the search field unless already displayed in the list
8. Click the name of the SSA to open the record

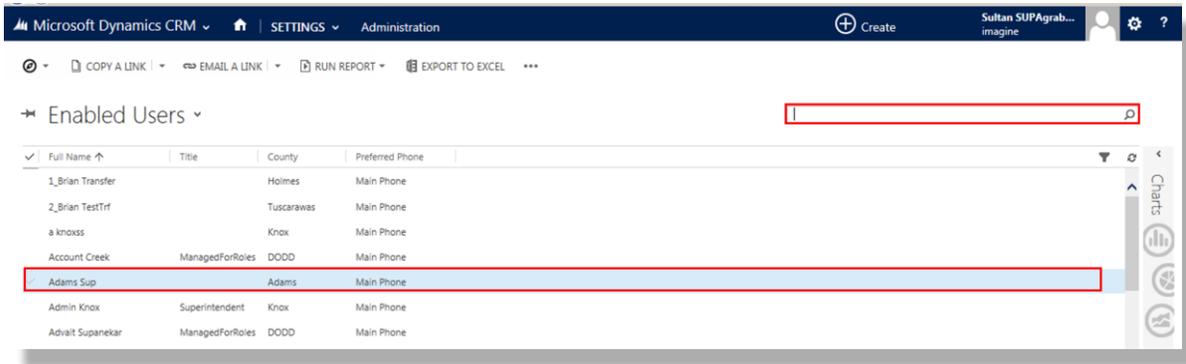


Figure 3 – Select SSA

9. Click the CHANGE MANAGER link

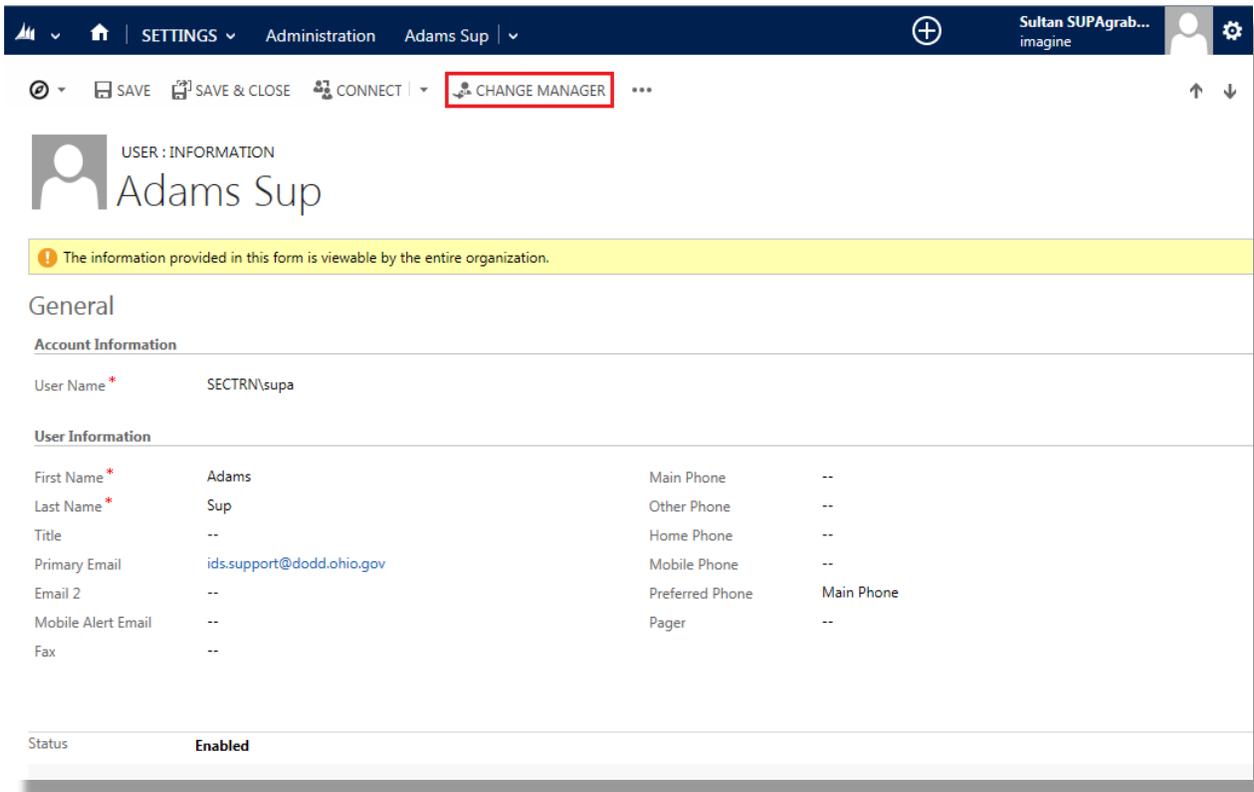


Figure 4 – User Information Page

10. Type an SSA Supervisor name or search for it
11. After the SSA Supervisor Name is found, Click OK
12. Click Save and Close

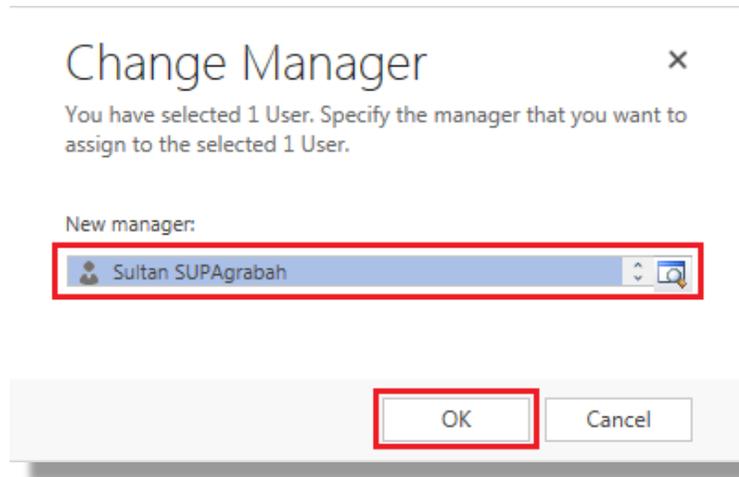


Figure 5 – Change Manage Approval Screen

Assigning and Reassigning an Individual to an SSA

Walks through how to assign or reassign an SSA to an Individual.

1. Sign on to *imagineIS* as an SSA Supervisor
2. Change the Dashboard to 'SSA Supervisor/Director Caseload' (If not already set)

3. Scroll down and select from any of the Individual Sub-Tables.

Microsoft Dynamics CRM | IMAGINE | Dashboards | Create | Sultan SUPAgrab... | imagine

SSA Supervisor/Director Caseload... ▾

My Direct Reports ▾

Search for records

Full Name ↑	County	Title	Preferred Phone
Daisy SSADuck	Harrison		Main Phone
Sultan SSAAgrabah	Harrison		Main Phone

Adv Find - Individuals for my SSAs ▾

Search for records

Last Name ↑	First Name ↑	Nick Name	Date of Birth	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County
Alltop	Lashonna	Candice Eckha...	10/10/2008	6621880	XXX-XX-2715		Sultan SSAAg...	HARR	HARR

Individuals Pending SSA Assignment ▾

Search for records

First Name ↑	Last Name	Nick Name	Date of Birth	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting Count...	Residence Count...
AKEEN	Vukovich		2/4/1961	8508538	278741676	343004139601		HARR	HARR
BETHENY	CAIN II		2/19/1973	9669636	290801344	101716910199		HARR	HARR
CATORIA	Titman		11/26/2008	6663512	272153597			HARR	HARR
Chidea	SZIVA		10/25/1995	6515772	289984376	104784483099		HARR	HARR
CHRISTEAN	METROFF III		5/26/2008	6663516	298131352			HARR	HARR
CHRISTEAN	Triplet-Boyd		6/7/1951	9392974	192426538	102204268199		HARR	HARR
Clariana	Pilgrim		5/15/2008	6646442	298139204			HARR	HARR
Corde	Lallathin		9/13/1971	9546978	291808468	343009479101		HARR	HARR

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My Notifications ▾

Search for records

Figure 6 – Assigning an individual to an SSA - Part 1

4. Search for the Individual and click to open the record
5. Scroll Down to the County Information

6. Click the 'Search' for the Assigned SSA

INDIVIDUAL : INFORMATION
CATORIA Titman

Date of Birth* 11/26/2008 | SSN XXX-XX-359 | Assigned SSA --

County Information

Enrollment Date	Termination Date	Reenrollment Date	
--	--	--	
Residence County	Reporting County*	Waiver County	
HARR	HARR	--	
Individual Waiver Type	Waiver Status	Waiver Start Date	Waiver End Date
--	--	--	--
Waiver Waiting List (WL)	Private Pay Individual (DRA)	PASRR Tracking (PTS)	Incident Tracking (ITS)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is DOD Source MUI	Date Of Death	IDS Living Arrangement	Special Category
<input type="checkbox"/>	*****	--	--
Assigned SSA			

Associated County Information

Associated County	--	Associated County R	--
Associated County S	--	Associated County E	--

DODD# 6663512 | Medicaid ID | Reporting County HARR

Active

Figure 7 – Assigning an Individual to an SSA - Part 2

7. Scroll through the list to find the SSAs or use the Search functionality
8. When the SSA is located, highlight and click the SSA
9. The name will appear as the assigned SSA

Is DOD Source MUI | Date Of Death ***** | IDS Living Arrangement -- | Special Category --

Assigned SSA
Aleesa SSASuper_ITR2

Associated County Information

Associated County	--	Associated County R	--
Associated County S	--	Associated County E	--

Services and Supports

DODD# 6663512 | Medicaid ID | Repo

Active

Figure 8 – Assigning an Individual to an SSA - Part 3

10. Click Save and Close

Setting Supervisor Notifications and Review

An SSA can have their profile set to send a notification or request reviewed by the SSA Supervisor each time Discovery Management, Outcome or an ISP is phased. This allows the SSA supervisor to review the work of their direct reports.

1. Sign on to *imaginIS* as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already set)
3. Search for the SSAs list in My Direct Reports.
 - a. If there are no SSAs listed in 'My Direct Reports', go to 'Setting Direct Report' step above

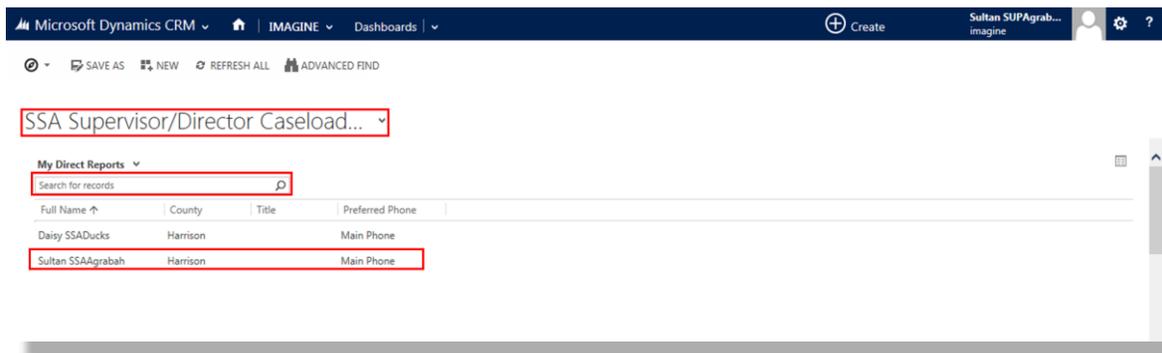


Figure 9 – Opening a Direct Report Record

4. Click on the direct reports Name to open the record
5. Click the down arrow on the blue ribbon next to the SSA's name to display the tiles
6. Scroll right to 'SUPERVISOR REVIEW SETTINGS' Tile and select

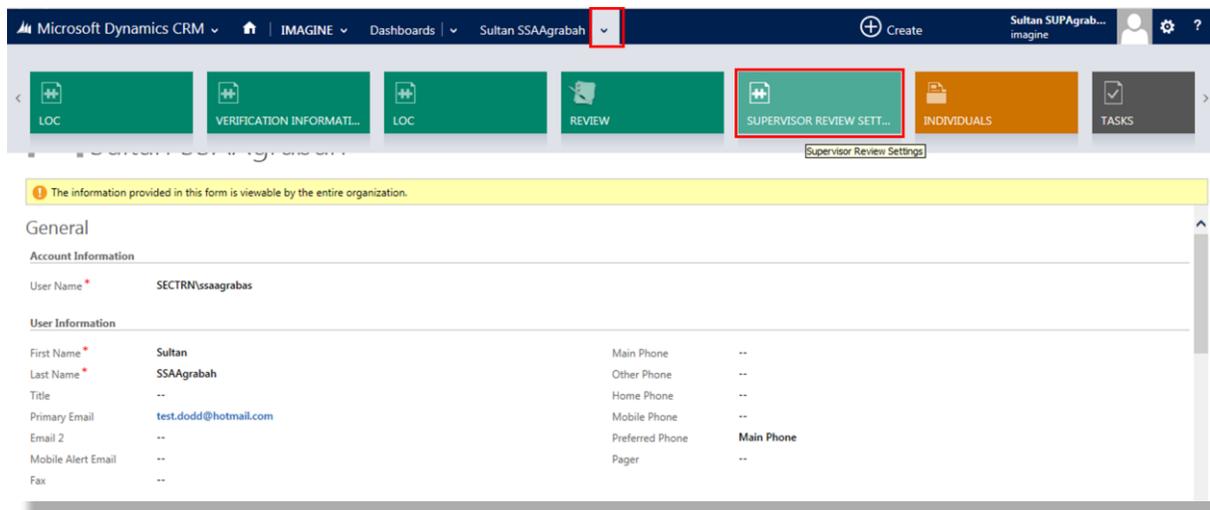


Figure 10 – Supervisory Settings

7. Select 'ADD NEW SUPERVISOR REVIEW SETTING'

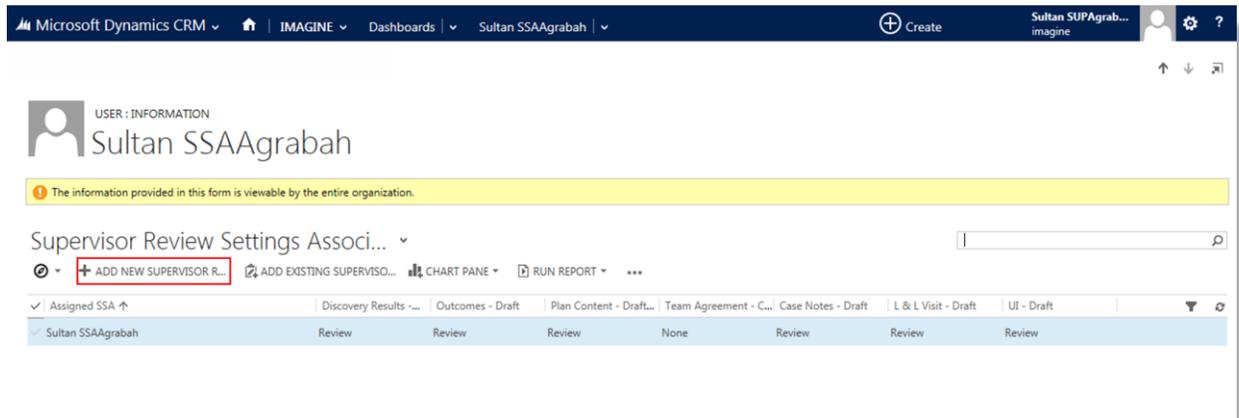


Figure 11 – Adding New Supervisor Settings - Part 1

8. Select the review setting for the supervisor.

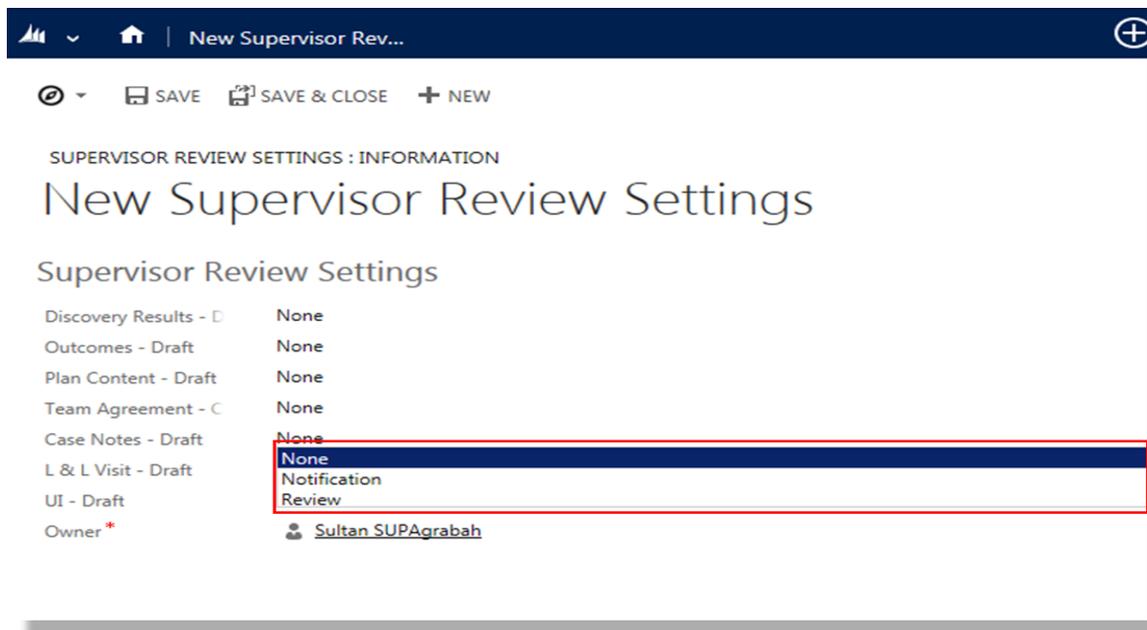
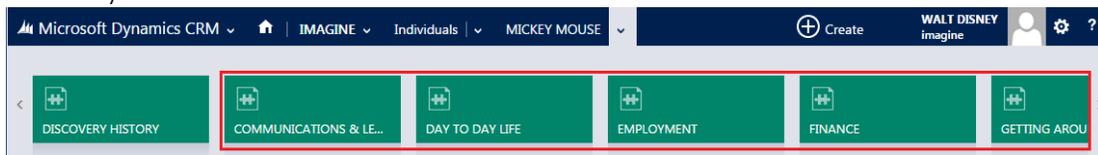


Figure 12 – Adding New Supervisor Settings - Part 2

9. Click Save and Close

Reviewing Discovery Results

1. Sign on to *imaginIS* as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already)
3. Click on an individual to open to their Front Page
4. From the Individual's Front Page, select the dropdown next to the Individual's name and select the Discovery Module to review.



5. Click on the Link in the List View to open the module

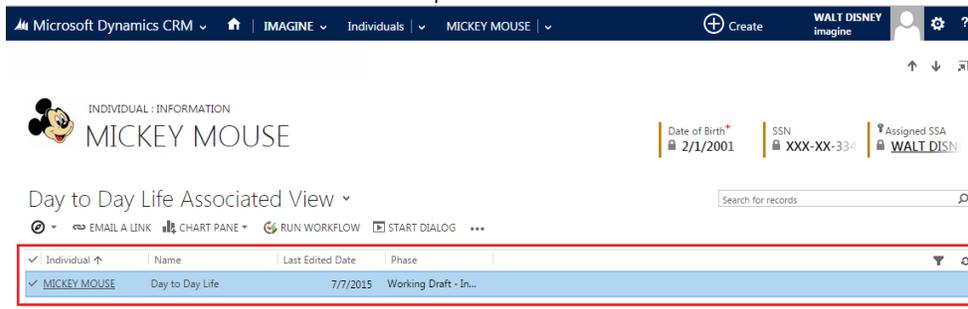


Figure 13 - Discovery Module List View

6. After reviewing the module, select Save & Close to Exit

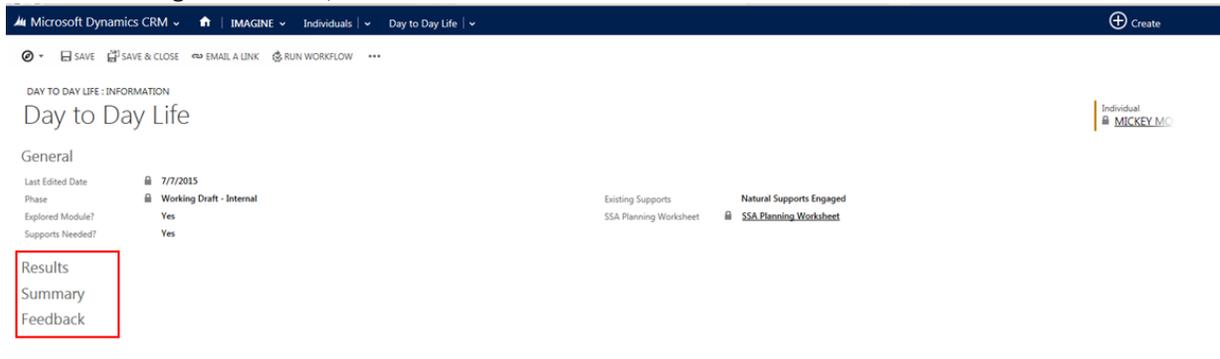


Figure 14 - Opened Discovery

Add Discovery Results Feedback

1. From Discovery Module Front page, click the More Commands (...)
2. Select 'Other Activities'
3. Select 'Notebook Activities', a New Notebook Activities' pop up will display

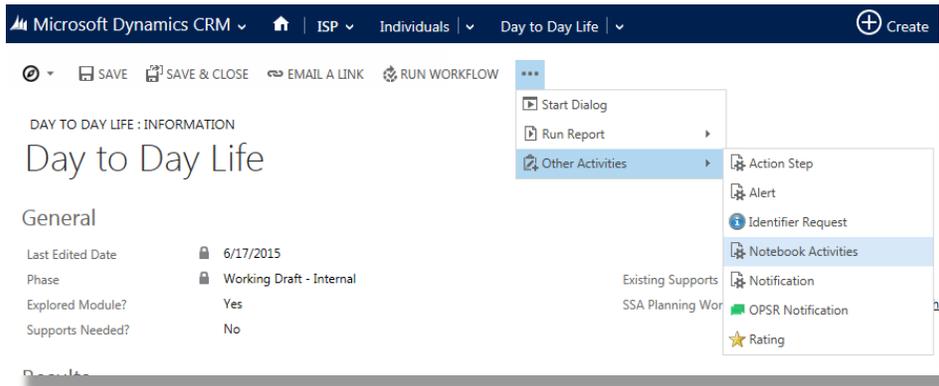


Figure 15 – Notebook Activities

4. Enter feedback information

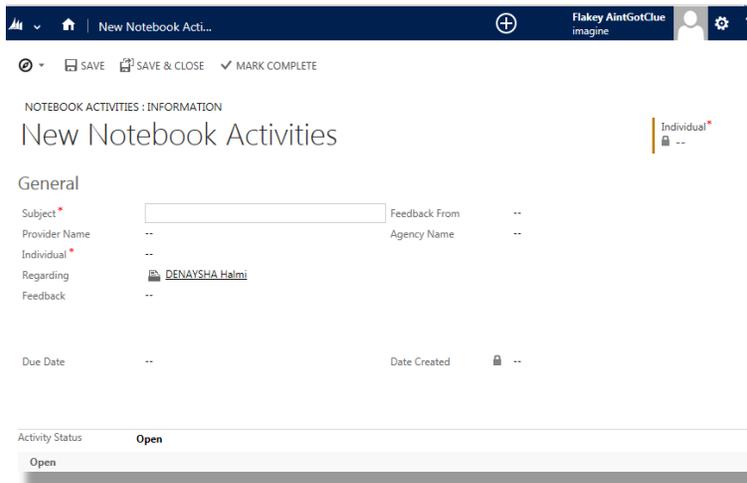


Figure 16 – New Discovery Feedback

5. Click 'Save & Close'. Feedback is saved back to the Feedback link on the Discovery Module Front Page

***Note:** User will need to reselect the Individual and Provider fields

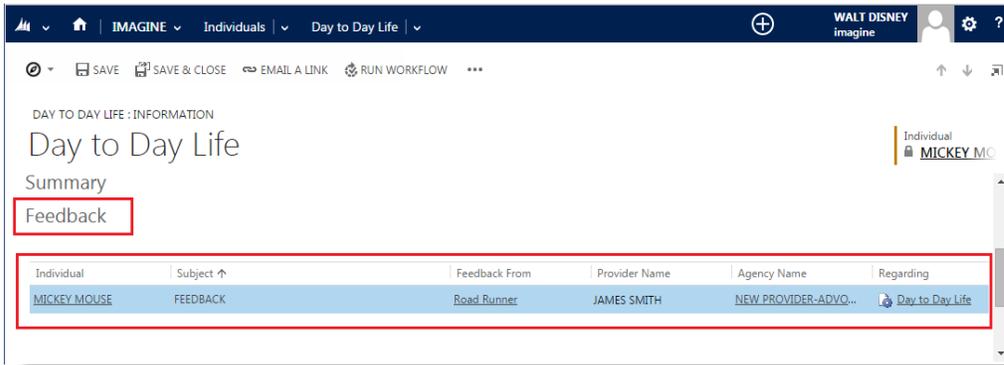


Figure 17 –Feedback List

Review Discovery Results Feedback

1. From the SSA Dashboard, change the List View to 'My Feedback Notes Dashboard',

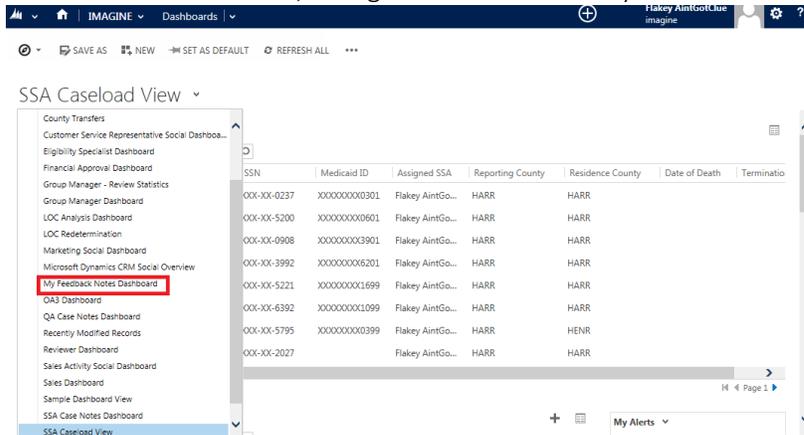


Figure 18- Caseload View

2. Click the 'Subject' link to review Feedback

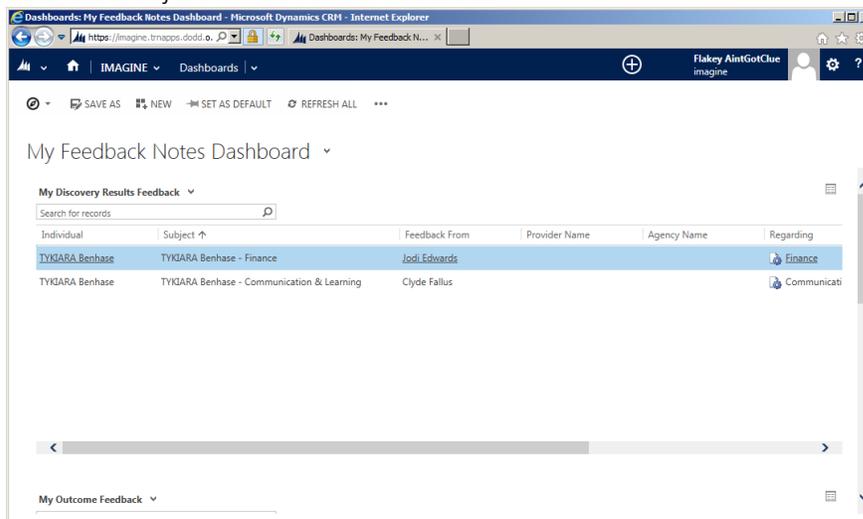


Figure 19- My Feedback Notes Dashboard

3. Click 'Close Notebook Activity' or 'Mark Complete'. Once the activity is marked complete it is no longer editable.

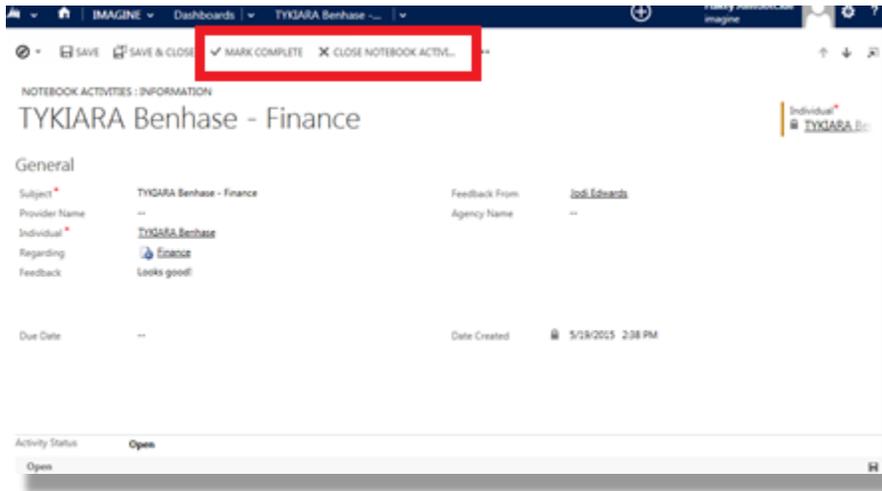


Figure 20- Feedback Complete

Reviewing Quick Summary Modules for an individual

The Quick Summary Modules provide a convenient way to review the status of the Individual’s Discovery Management process once Discovery Management has been published.

1. Sign on to *imaginIS* as an SSA Supervisor
2. Click on the IMAGINE drop down
3. Click on the ‘INDIVIDUALS’ Tile to open
4. Double click on the individual to open up the record

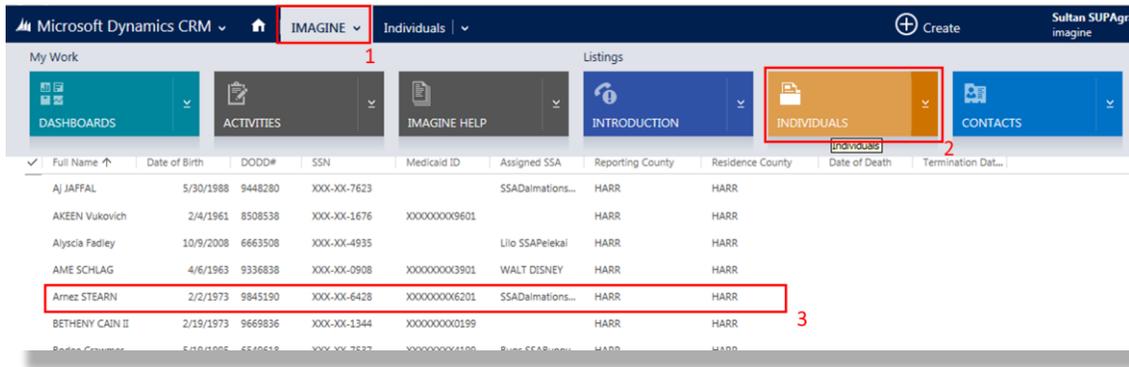


Figure 21 – Individual Listing

5. Scroll down and click on one of the Quick Summary listings:
 - a. Discovery Quick Summary
 - b. Individual Quick Summary

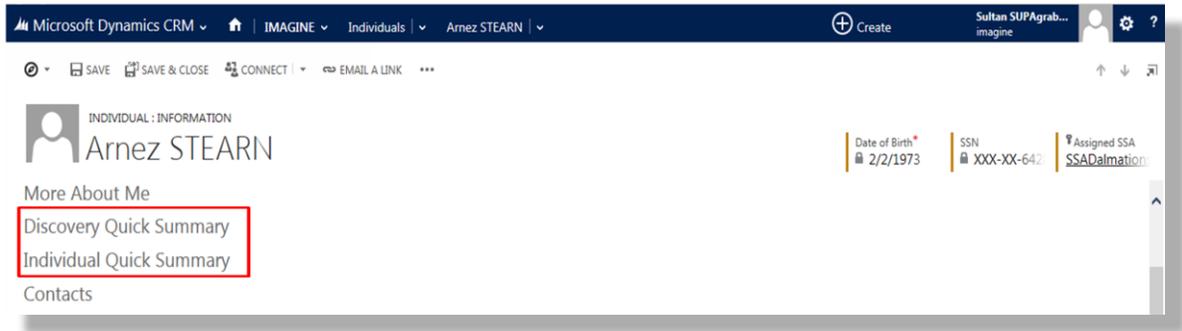


Figure 22 – Individual Quick Summaries

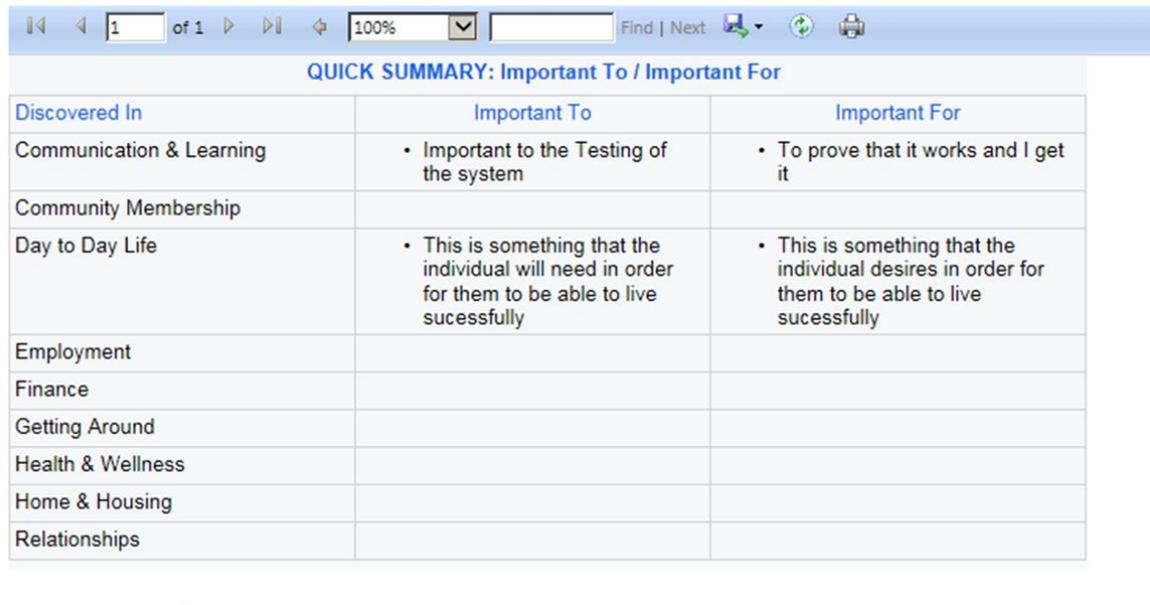
Discovery Quick Summary

Discovery Results	Explored Module?	Existing Supports	Support Requested?	Last Edited Date
Communication & Learning	Y	Natural Supports Engaged	Yes	06/17/15
Community Membership	N		No	04/08/15
Day to Day Life	Y	Natural Supports Engaged	Yes	06/16/15
Employment	N		No	04/08/15
Finance	N		No	04/08/15
Getting Around	N		No	04/08/15
Health & Wellness	N		No	04/08/15
Home & Housing	N		No	04/08/15
Relationships	N		No	04/08/15

Discovery Quick Sur* 4/8/2015

Figure 23 – Discovery Quick Summary Sample

Note Quick Summaries will only display data after Discovery results have been published.*



Discovered In	Important To	Important For
Communication & Learning	<ul style="list-style-type: none"> Important to the Testing of the system 	<ul style="list-style-type: none"> To prove that it works and I get it
Community Membership		
Day to Day Life	<ul style="list-style-type: none"> This is something that the individual will need in order for them to be able to live sucessfully 	<ul style="list-style-type: none"> This is something that the individual desires in order for them to be able to live sucessfully
Employment		
Finance		
Getting Around		
Health & Wellness		
Home & Housing		
Relationships		

Figure 24 – Individual Quick Summary Sample

Reviewing or Advancing (Activating) an Outcome (With Supervisor Review On)

Prior to executing a plan for an Outcome, the Outcome must be reviewed by all parties and phased through the required step to be activated. This section walks through how to advance the Outcome to an active status.

1. Sign on to *imaginIS* as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already set)
3. Scroll down the page to 'My Alerts'
4. Click the 'Outcome Review Required' entry

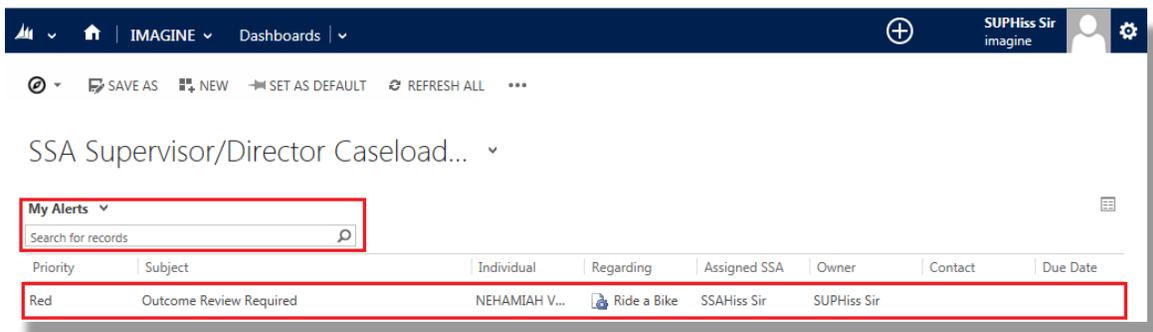


Figure 25 – Outcome Review

5. Click the 'Regarding' link to open the Outcome to review

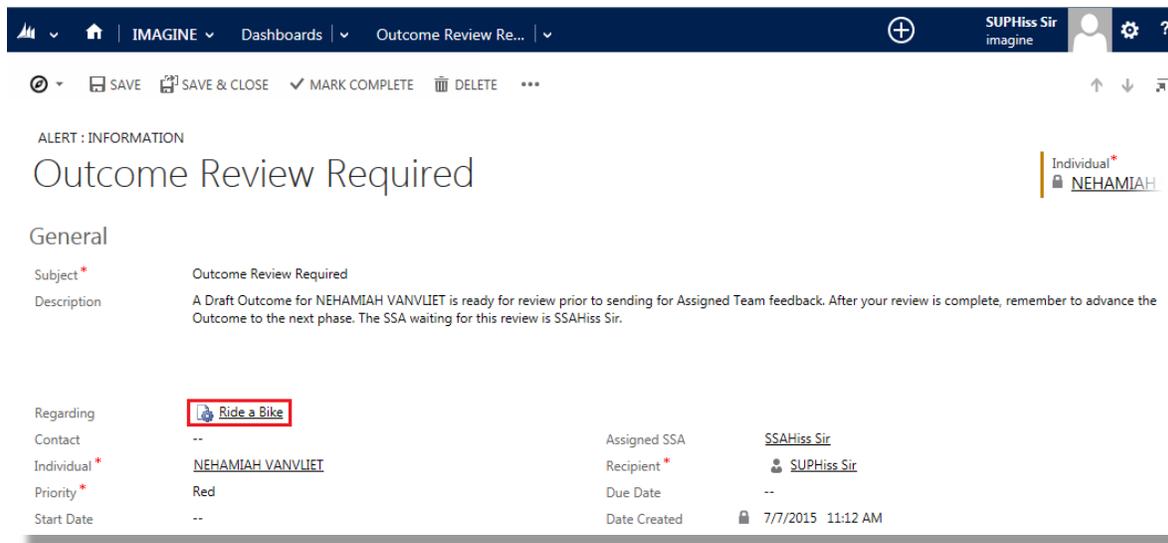


Figure 26 – Alert Information: Regarding

- a. Once the Outcome displays, the Supervisor can scroll through the Outcome as desired
- b. Click the title lines to expand and review

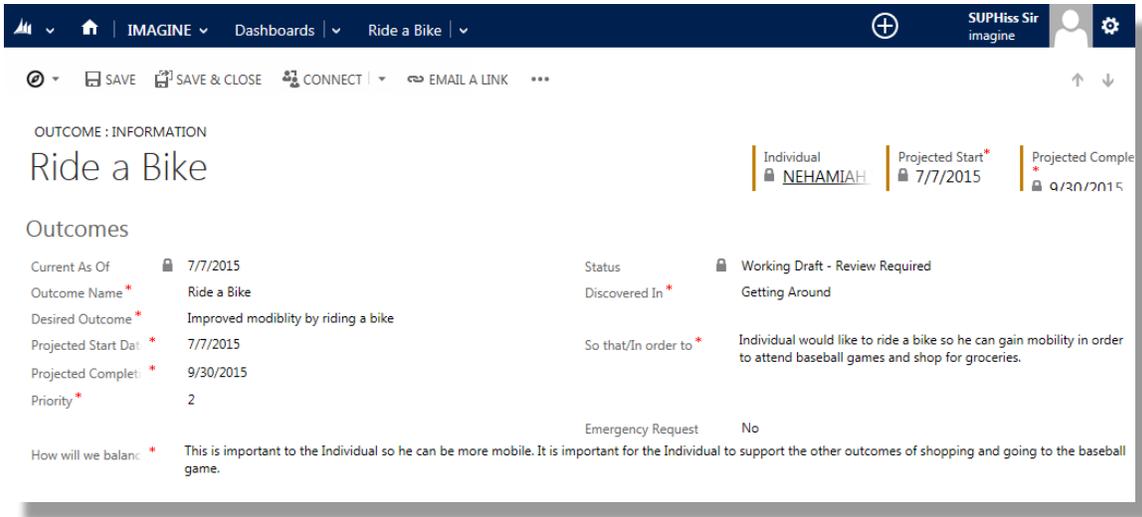


Figure 27 – Outcome Information

NOTE: Once the review is complete the SSA Supervisor has two choices; move the Outcome to the next Phase allowing the process to continue or returning the Outcome to the SSA for further refinement.

- 6. To move the Outcome to the next phase click the ‘More Commands’ ellipsis (...) then click ‘Next Phase’. Two confirmation alters will be displayed. Accept the notices by clicking ‘OK’. The Outcome is moved to ‘Draft Distributed’. The Outcome is now visible to all members of the Team.
- 7. To return the Outcome to the SSA for further refinement reset the Outcome to ‘Working Draft – Internal’ by clicking the ‘More Commands’ ellipsis (...) then clicking ‘Reset to Internal’.

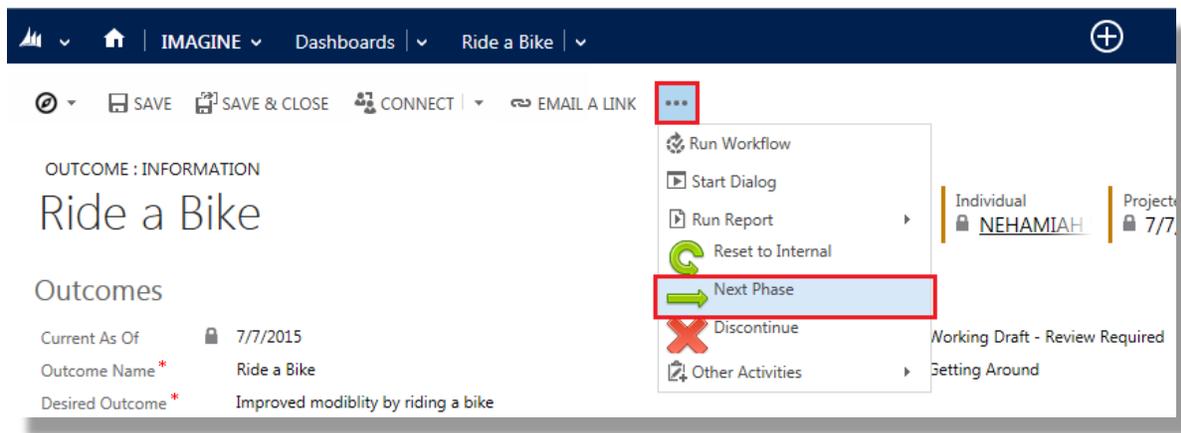


Figure 28 – Outcome Page: Phasing

- Once the review process is complete the Alert will need to be marked completed. Click the 'Mark Complete' option on the Alert screen to close and removes the alert from the 'Alerts' list on the 'SSA Supervisor/Direct Caseload' dashboard.

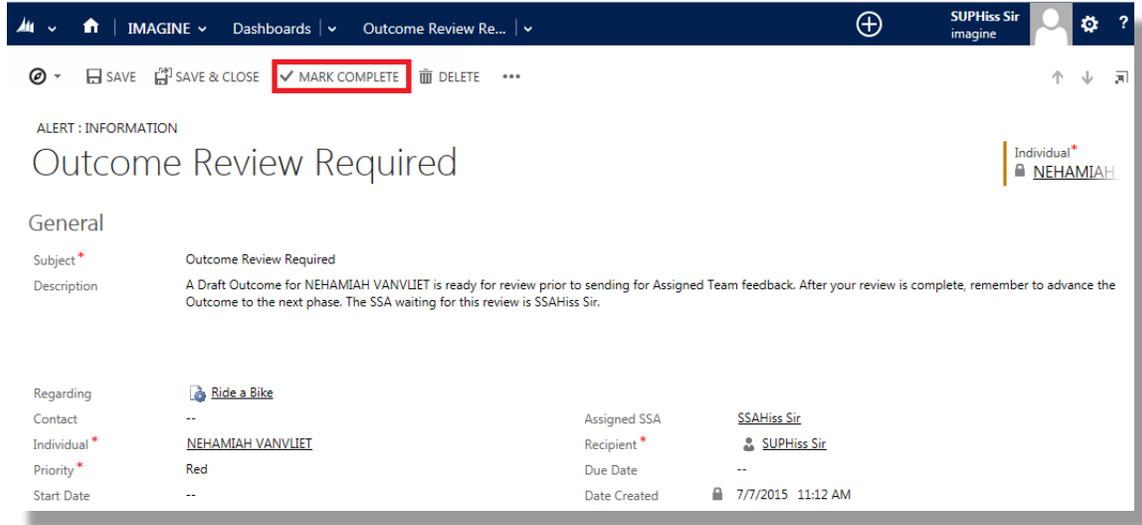


Figure 29 – Alert Information: Mark Complete

Reviewing ISP for an individual (With Supervisor Review On)

If the SSA Supervisor requests to review the ISP, (See the section on Setting Supervisor Review), the section below steps through where to find the ISP on the Supervisor Dashboard and how to mark the alert as complete.

1. Sign on to *imaginIS* as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already set)
3. Scroll down the page to 'My Alerts'

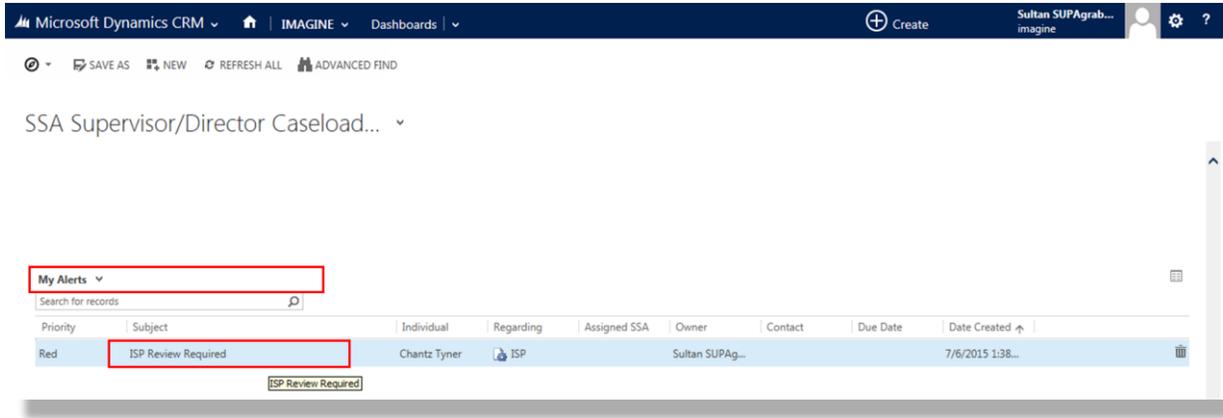


Figure 30 – ISP Review Required

4. Double click the 'ISP Review Required' alert item to open the ISP
5. In the Alert, click the 'Regarding' item to open the ISP to review

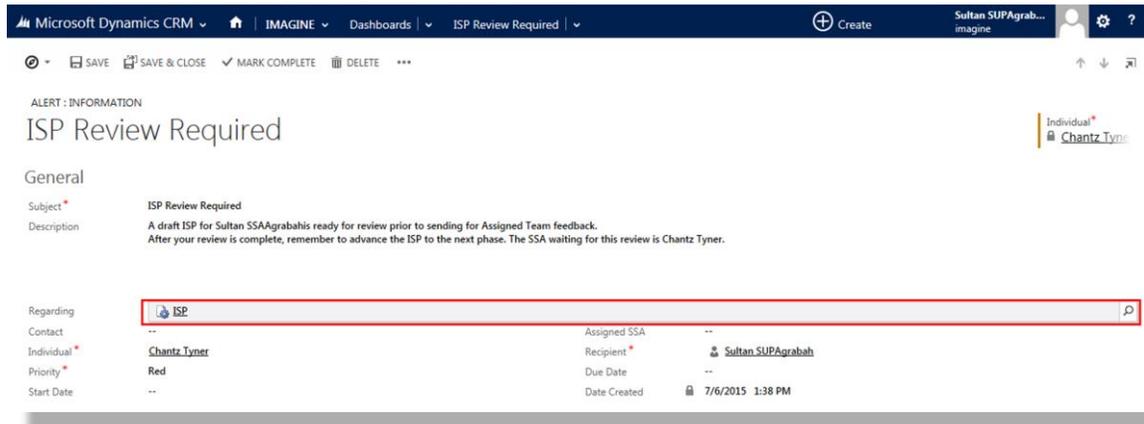


Figure 31 – Alert Information: ISP Review Required

6. When ISP opens, the supervisor can:
 - a. Review or update
 - b. Respond or provide feedback
 - c. Advance to the next phase
7. To Advance to the next phase, click more commands (...) and select Next Phase

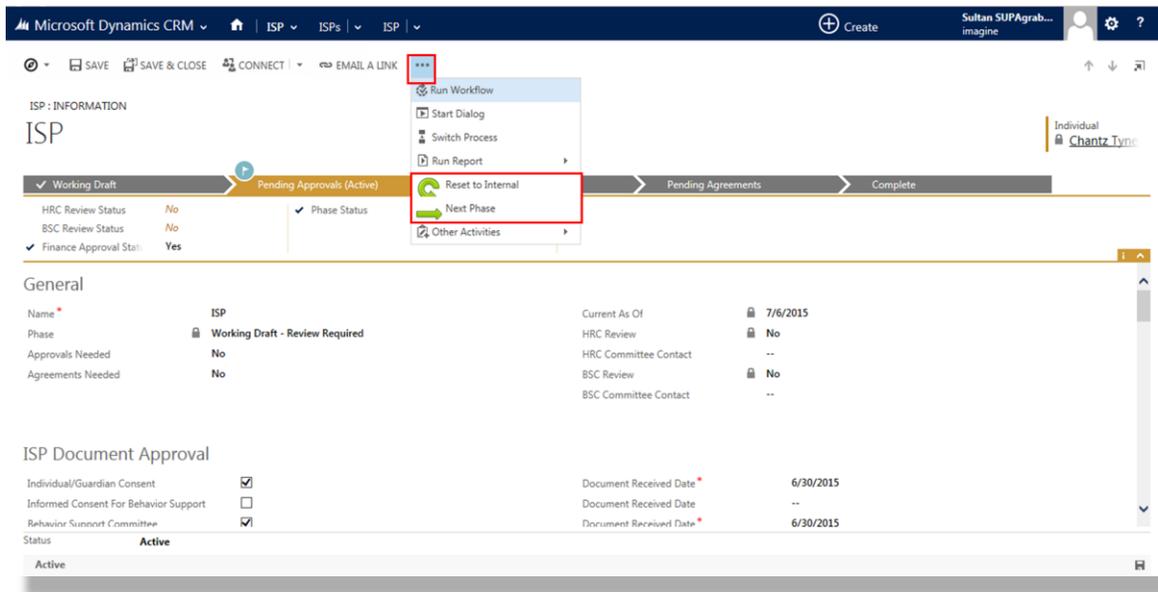


Figure 32 – Advancing the Phase

8. Click OK to each of the confirmation widows that display



Figure 33 – ISP Confirmation

9. Select 'Mark Complete' to close the Alert

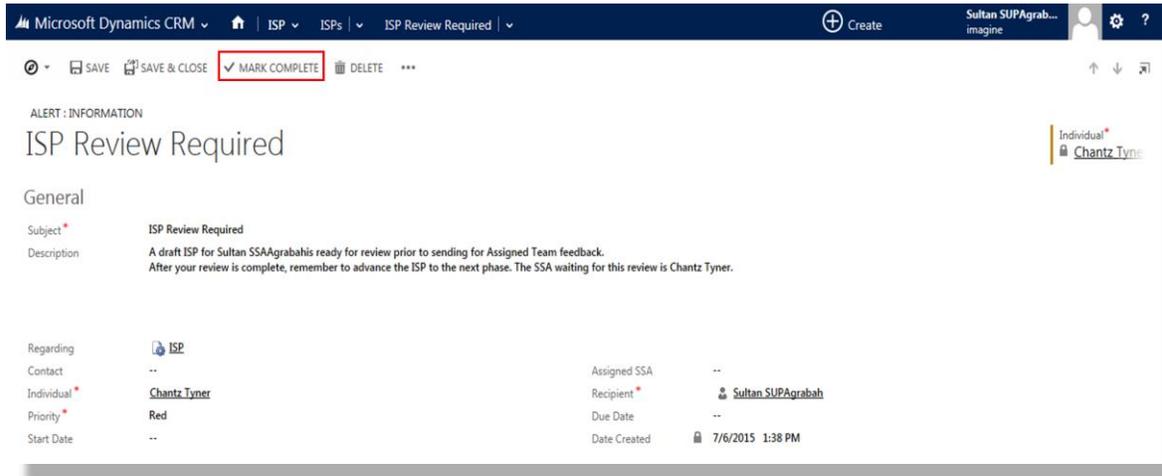


Figure 34 – Marking an Alert Complete

Note: The SSA Supervisor will be notified if the ISP has been set to 'Review' status. The 'Review' setting requires the SSA Supervisor to move (action) the ISP to the next phase. If the setting were set to 'Notify' or 'None', then the SSA actions the ISP to the next phase.

Validate User Security Roles

The below is for reviewing user security roles with in the *imaginelS* system.

1. Sign on to *imaginelS* as an SSA Supervisor
2. Click the CRM drop down
3. Click the 'SETTING' Tile

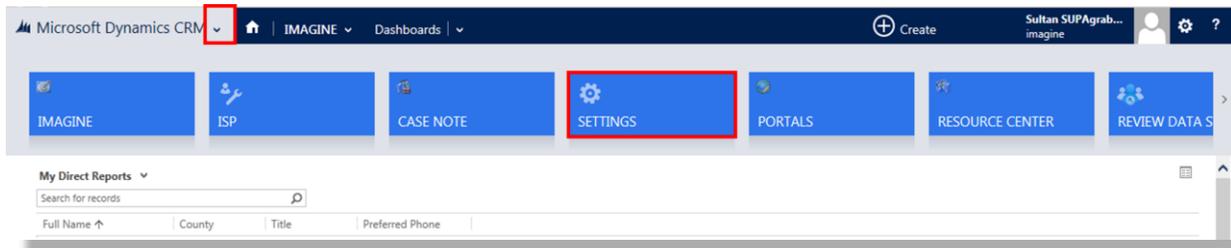


Figure 35 – Initial Menu Settings

4. Select the 'SETTINGS' drop down
5. Click on the 'ADMINISTRATION' Tile
6. Click Users

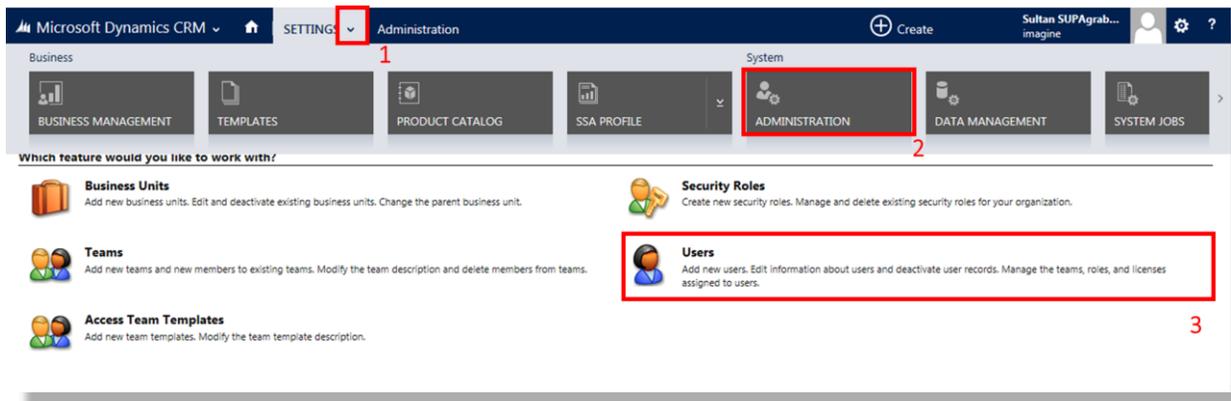


Figure 36 – Validate User Security Roles – Part 1

7. Type the user name in the search window and select Enter
8. Double Click the user to open
9. Click the drop down next to the users name
10. Click the 'SECURITY ROLES' Tile

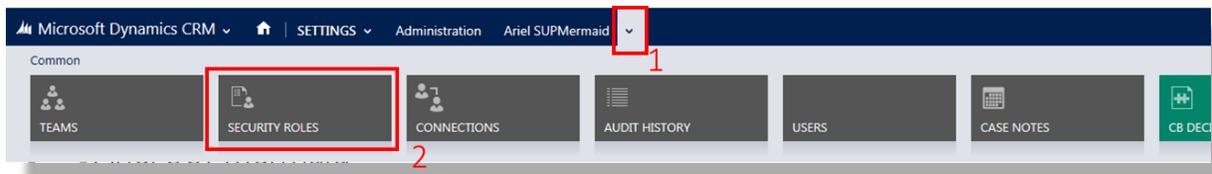
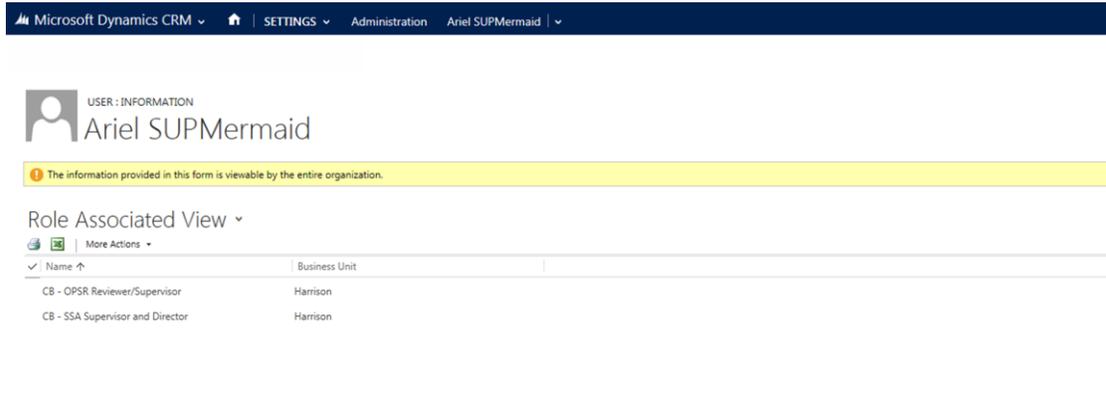


Figure 37 - Security Roles Tile

11. Click on the security role to display the assigned security



12. Click the tabs to reveal the security roles underneath

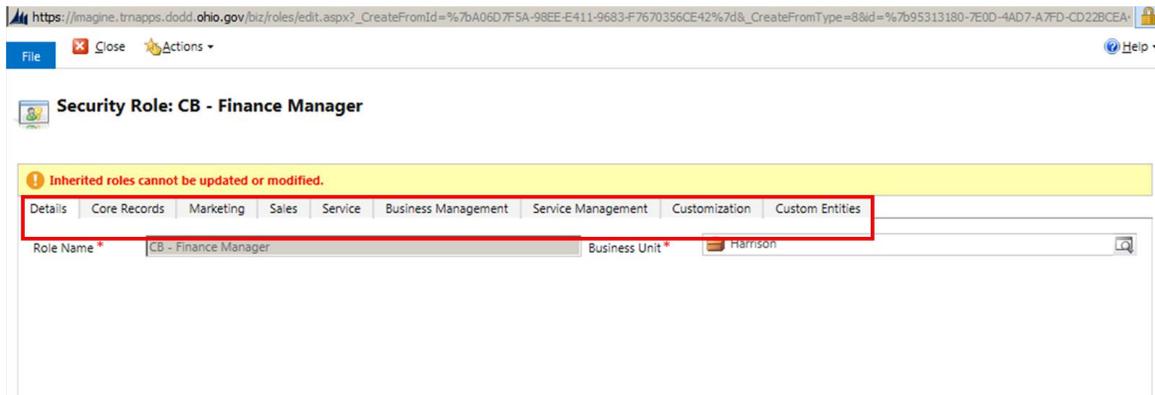


Figure 38 – Validate User Security Roles – Part 2

Confirm Security Role Titles

Once the county approver has requested and had the necessary security added to a user's role, confirmation to the user's titles is completed here.

1. Sign on to *imaginelS* as an SSA Supervisor
2. Click on the CRM drop down
3. Click the 'SETTINGS' drop down
4. Click the 'SETTINGS' Tile

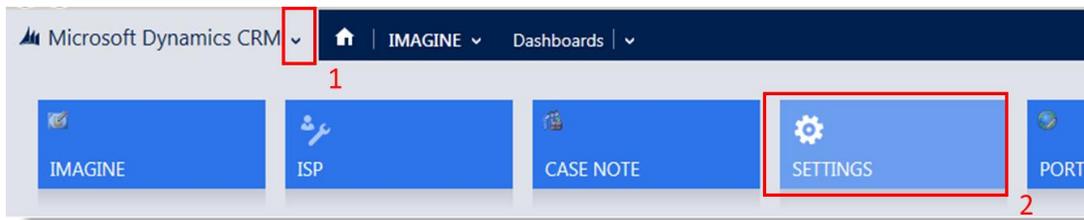


Figure 39 – Settings for User Groups

5. Click the Users link

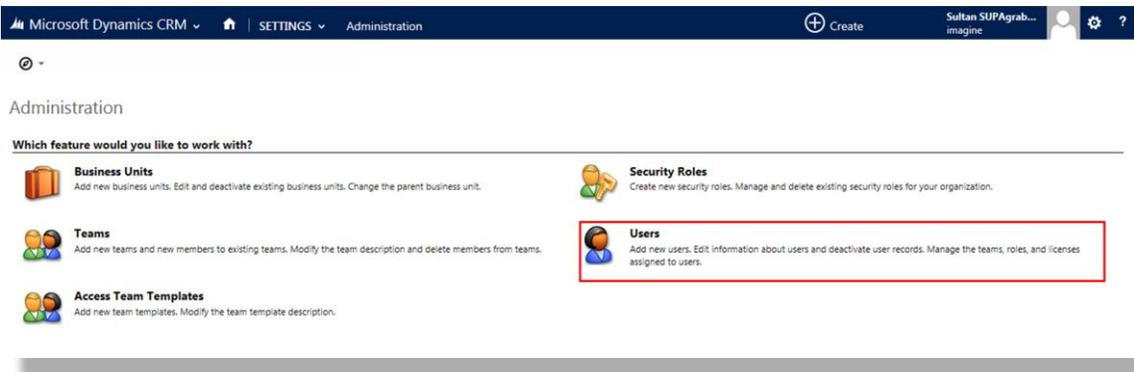


Figure 40 – Select User Link

6. Search/Select the users

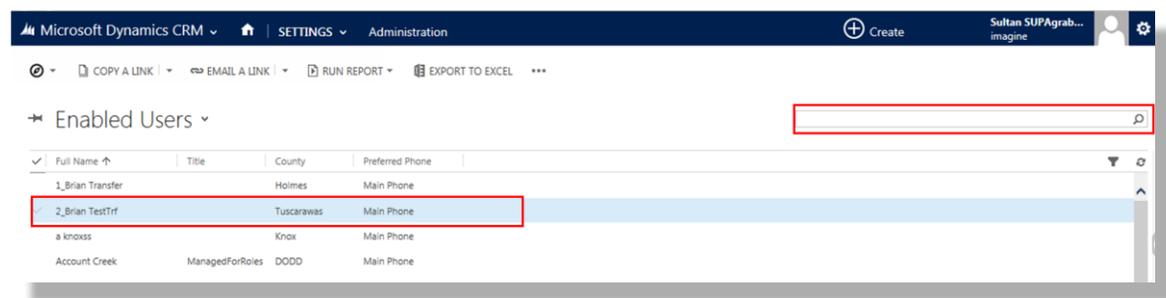


Figure 41 – Search and Select User

7. Scroll down to 'User Titles'
8. Click the roles that apply
9. Click Save

10. Click Save and Close

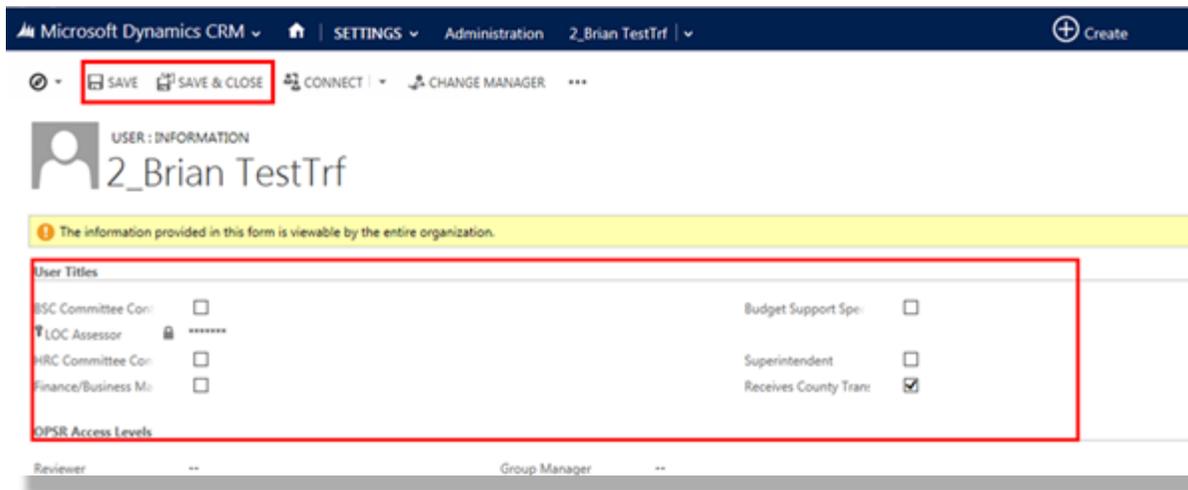


Figure 42 – Select to confirm user’s title

Enter a Social Security Number, Medicaid Number or update DOB for an Individual

This section explains how to update Date of Birth, Medicaid Number, and Social Security Number for an Individual.

1. Sign on to *imaginIS* as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already set)
3. Scroll down and click on a user from any of the Individual Sub-Tables.

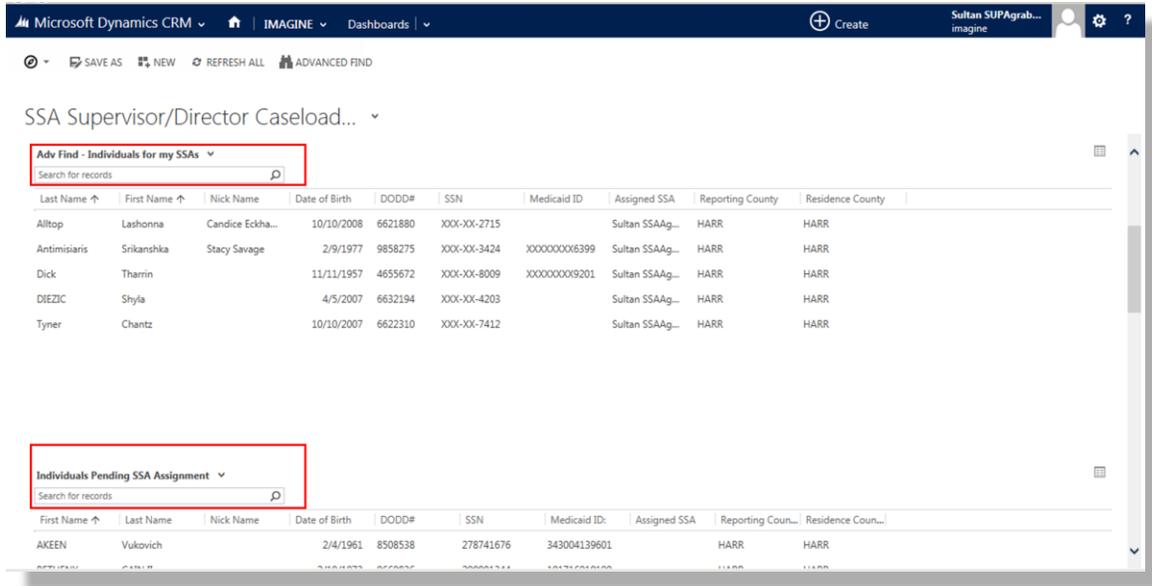


Figure 43 – Sub-tables of Individuals

4. DOB is a the top of the screen, click to make a change

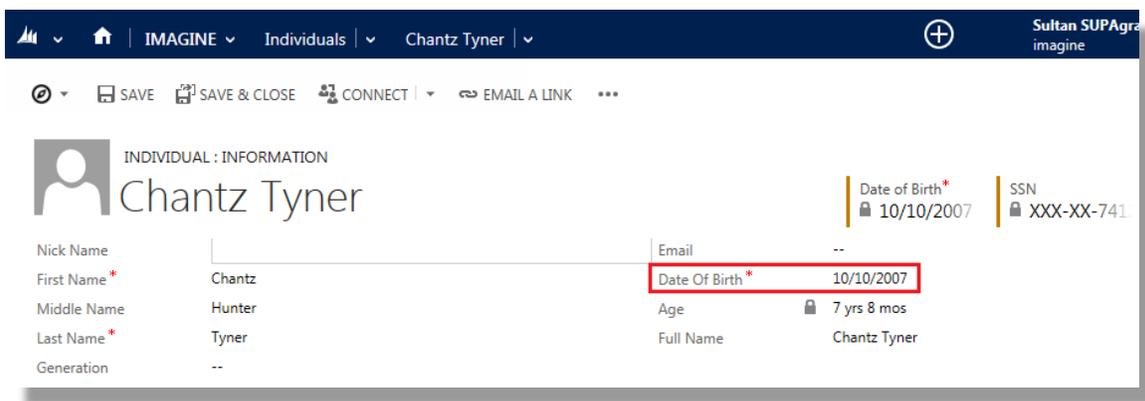


Figure 44 – Individual Information: Date of Birth

5. Scroll down the page to the Additional Demographics (Click to open and see the details)
6. Click on the SSN or Medicaid Number field to make a change

Individual Information for Chantz Tyner

Date of Birth* 10/10/2007

Additional Demographics

Individual IDs

DODD#	SSN	Medicaid ID
6622310	287-13-7412	

Figure 45 – Update/Review DOB, Medicaid, & SSN for an Individual

7. Click Save and Close

Note: A Supervisor can only add a new SSN or Medicaid number. To update/change these fields requires a DODD Systems Administrator.

Change the Name of an SSA

1. Sign on to *imaginIS* as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already set)
3. Under 'My Direct Report' sub-menu, Search for or Click on the Direct Report's name

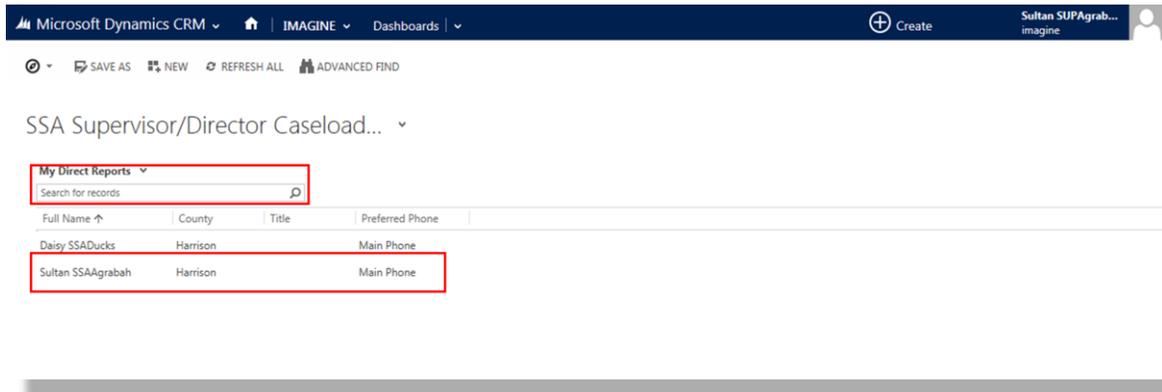


Figure 46 – Find Direct Report

4. Click on the first or last name and then change it
5. Select Save and Close

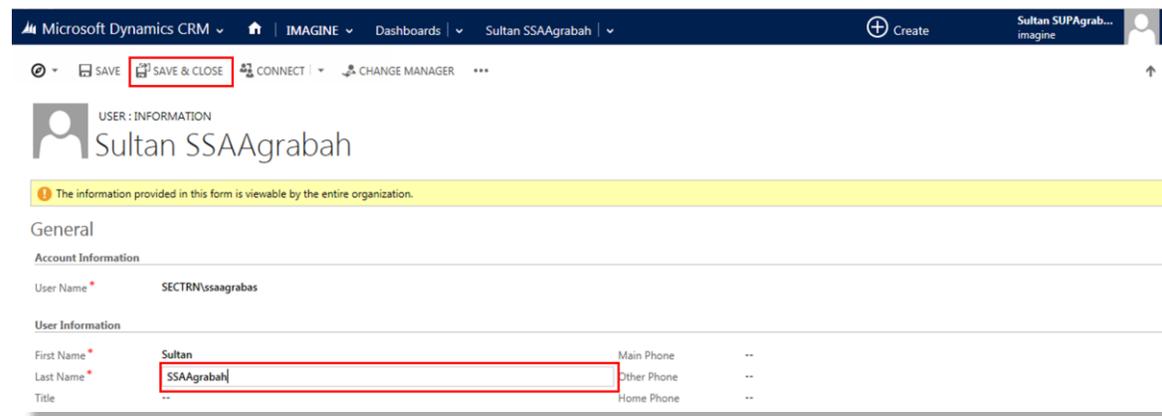


Figure 47 – Change Name of Direct Report

Remove an SSA from the Team

1. Sign on to *imagineIS* as an SSA Supervisor
2. Change the Dashboard to SSA Supervisor/Director Caseload (If not already set)
3. Under 'My Direct Report' sub-menu, Search for or Click on the Direct Report's name



Figure 48 - Supervisor Direct Reports

4. Select the drop down next to the Name in the blue ribbon
5. Select the Team Tile

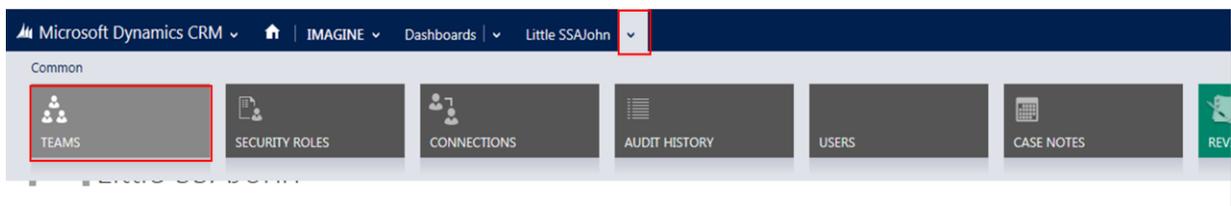


Figure 49 - Selecting TEAMS Tile

6. Change the view to Team Associated View to display all teams the user is on.

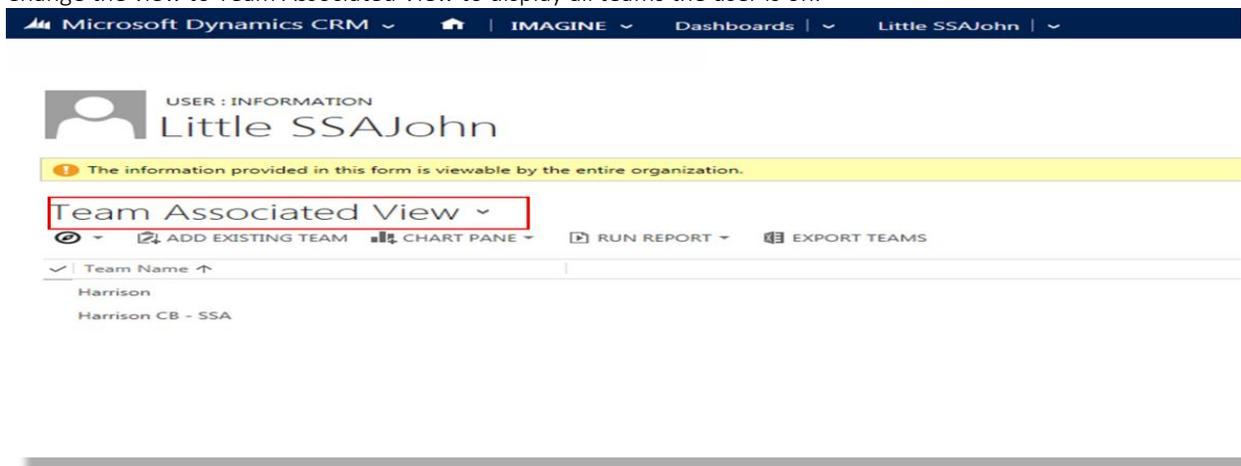


Figure 50 - Team Associated View

7. Click on the team name to display the remove link
8. Select the Remove link
9. Repeat until user is removed from all teams.

Microsoft Dynamics CRM | HOME | IMAGINE | Dashboards | Little SSAJohn

USER : INFORMATION
Little SSAJohn

The information provided in this form is viewable by the entire organization.

Team Associated View

ADD EXISTING TEAM REMOVE COPY A LINK EMAIL A LINK ...

Team Name
Harrison Harrison CB - SSA