imagineIS

Implementation and Change Management Project

Service Support Administrator Guide

Work Request Numbers:
DMR01-0000018510

Version 1.3 – Final
September 3rd, 2015

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Document Information:

Document Title	Project Document Template
Version:	Final
Owner:	Ohio Department of Developmental Disabilities
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Document History:

Name	Date	Version	Approver	Modifications
Crystal Strain	6/12/2015	0.1		Initial Draft
Lawrence Pfaff	6/19/2015	0.2		Format Update
Charles Rahmig	7/9/2015	0.5		Review and update final version of document
Charles Rahmig	7/10/2015	1.0		Promote to Final
Eric Gill	9/3/2015	1.3		Revised to reflect new functionality.

Document Approval:

The signatories below acknowledge that they have read, understand and approve the contents of this document.

APPROVAL			
Signatures	V.J. Masson	___________________________	Date: __________
	Debra Albert	___________________________	Date: __________
	Michelle Burk	___________________________	Date: __________

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Individual

The Individual record is the core of the ***imagineIS*** system. This record is the center of all ISP planning efforts. Some of the Individual data will be pre-loaded into the system from the Individual Data System (IDS). Additional information is required in order to complete the ISP process.

Updating an Individual Record

1. From SSA Dashboard Click on Individual's name in the List View to access Individual's Front Page
2. Scroll down to 'Addresses'
3. Click on the '+' icon to the right of the List View; New individual Address box displays

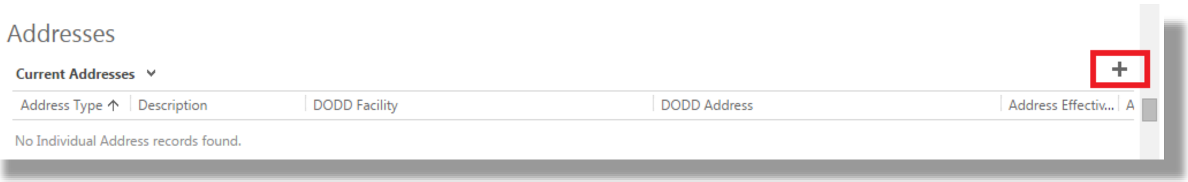


Figure 1 - Add Current Address

4. Enter description, address type and living arrangement
5. In the Address field click on the search icons, if the address you want is not already there, then click the '+New' button and enter a new address

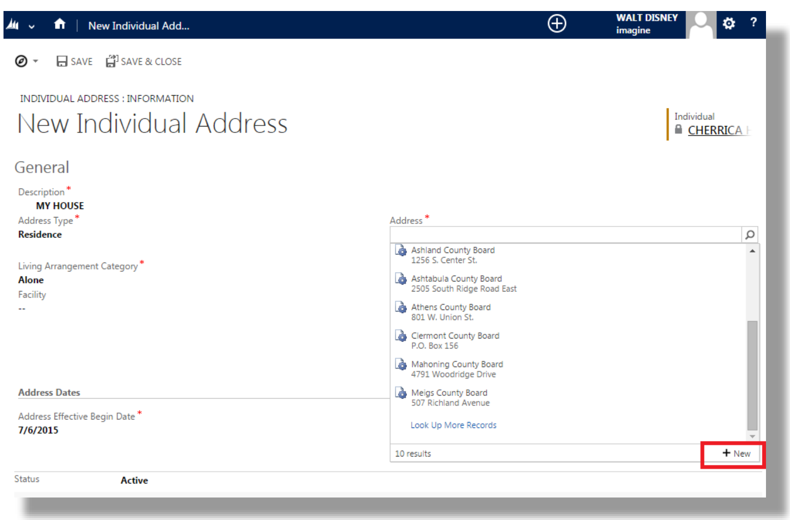


Figure 2 – Create New Address

6. Complete fields in new pop up window

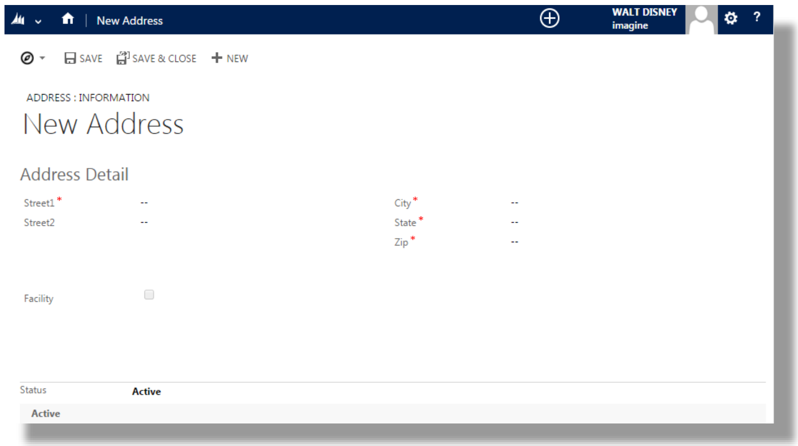


Figure 3 - Enter New Address

7. Click 'Save & Close'

End/Replace an Address

When an Individual moves from one address to another, the current address should be end dated and a new entry added to reflect the most current 'active' address. This will create the needed history of where the Individual has lived over the course of time.

1. Click on the Address section to open in List View
2. Double-click on the address row, not the address link to access address information
3. Scroll down to Address Dates and enter 'Address Effective End Date'

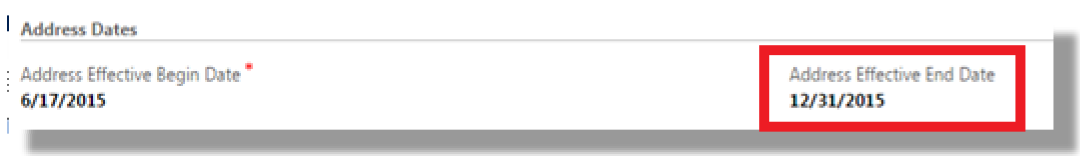


Figure 4 – End/Replace Address

4. Click 'Save & Close'

Inviting an Individual

1. From the Individual's Front Page, click on the More Commands (…)
2. Select 'Create Invitation Code', this will send an email to the Individual's email address

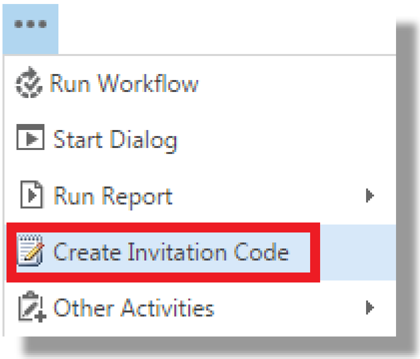
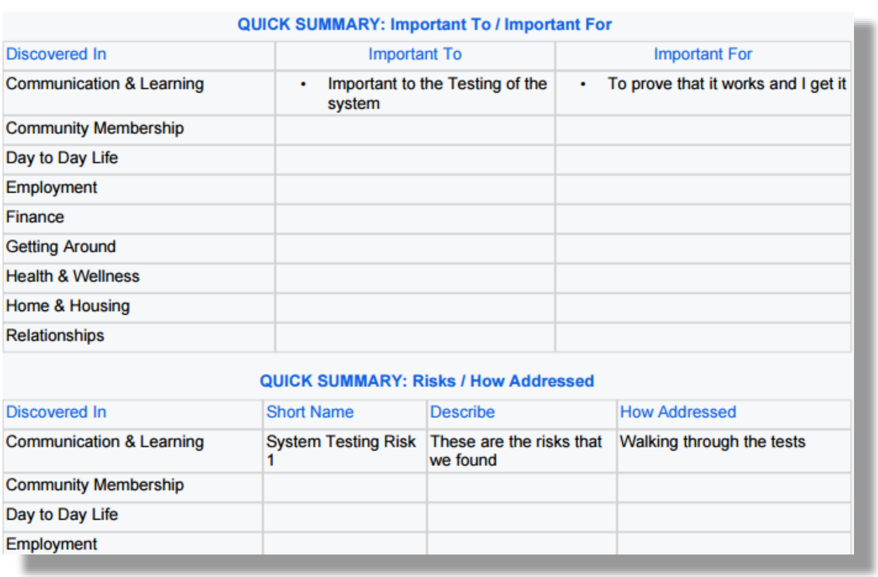


Figure 5 – Inviting an Individual

3. The Individual will receive an email from AgencyIDService@Ohio.gov with instructions on how to gain access to the portal

Individual Quick Summary

1. From the Individual's Front Page, Click on the 'Individual Quick Summary' link. Summary of the last published Discovery Result regarding Important To/For and Risks/How Addressed will display



QUICK SUMMARY: Important To / Important For

Discovered In	Important To	Important For
Communication & Learning	• Important to the Testing of the system	• To prove that it works and I get it
Community Membership		
Day to Day Life		
Employment		
Finance		
Getting Around		
Health & Wellness		
Home & Housing		
Relationships		

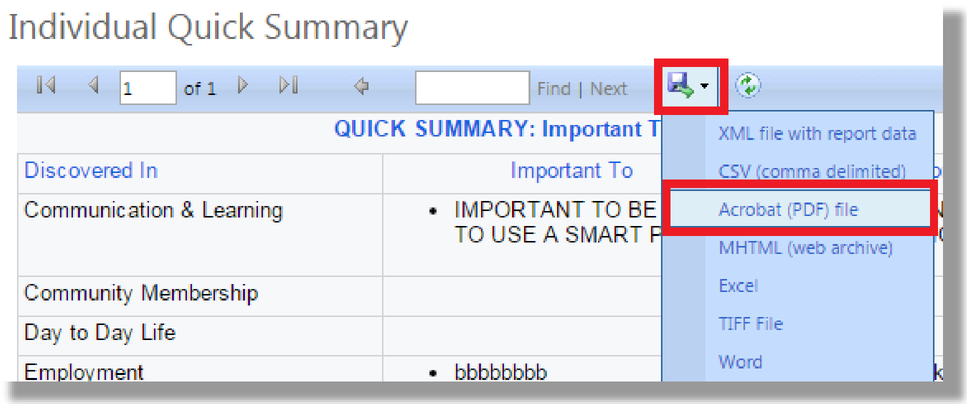
QUICK SUMMARY: Risks / How Addressed

Discovered In	Short Name	Describe	How Addressed
Communication & Learning	System Testing Risk 1	These are the risks that we found	Walking through the tests
Community Membership			
Day to Day Life			
Employment			

Figure 6 – Individual Quick Summary

2. Click on the 'Individual Quick Summary' link to collapse view

3. To export the Individual Quick Summary, click on the Export button and select Acrobat (PDF) file. File will download in PDF format



Funding Quick Summary

1. From the Individual's Front Page, Click on the 'Funding Quick Summary' link. Summary info regarding current funding information will display

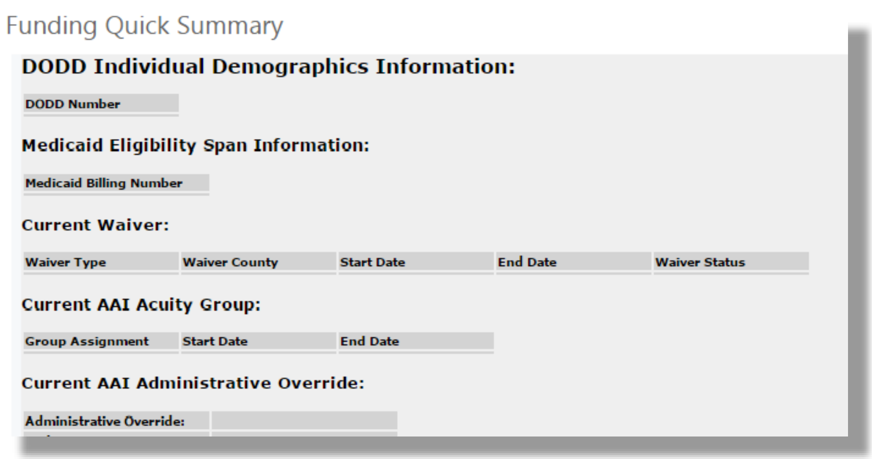


Figure 7 – Funding Quick Summary

2. Click on the 'Funding Quick Summary' link to collapse view

Contacts

Contacts are people you do business with or who are associated with the Individual.

Create a Contact

1. Click 'IMAGINE' dropdown and select 'Contacts' tile

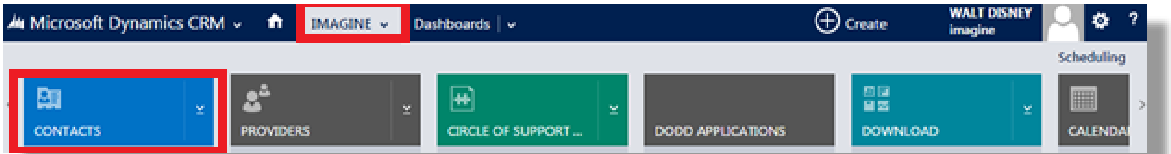


Figure 8 - ImagineIS Contacts

2. Click '+NEW' button

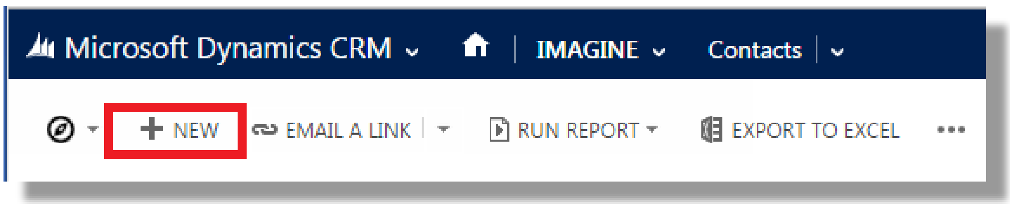


Figure 9 – New Contact

3. Enter Contact details

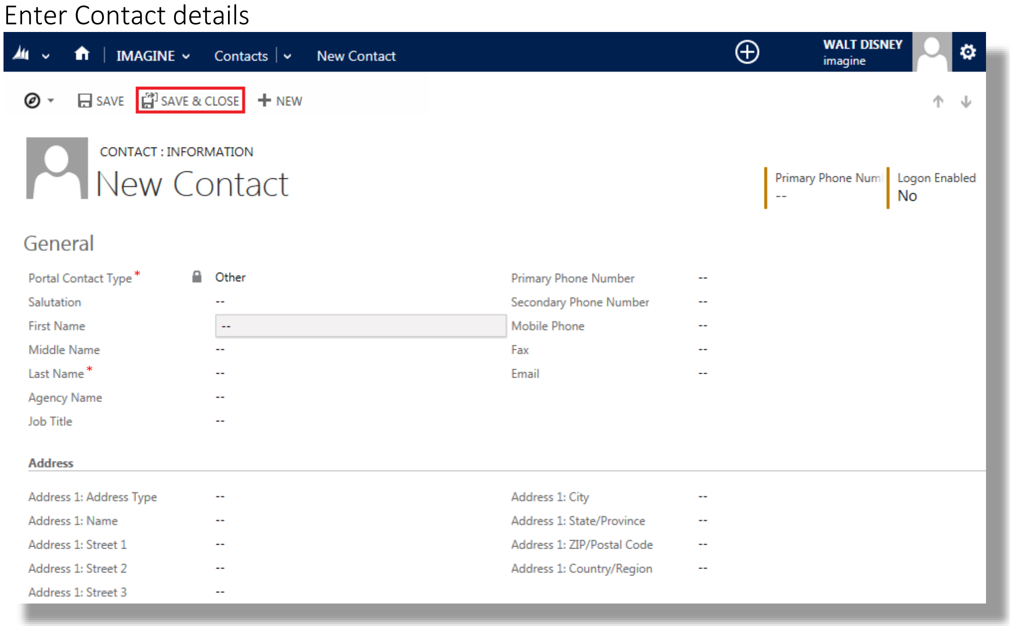
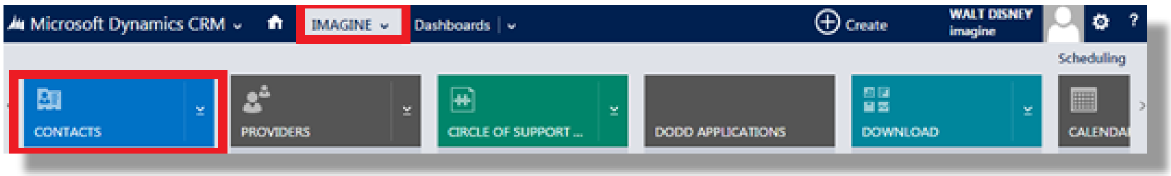


Figure 10 - Add New Contact Information

4. Click 'Save & Close'

Search Contacts

1. Click 'IMAGINE' dropdown and select 'Contacts' tile. The Active Contacts list view will display



2. Enter Contact search criteria in the search box to the right

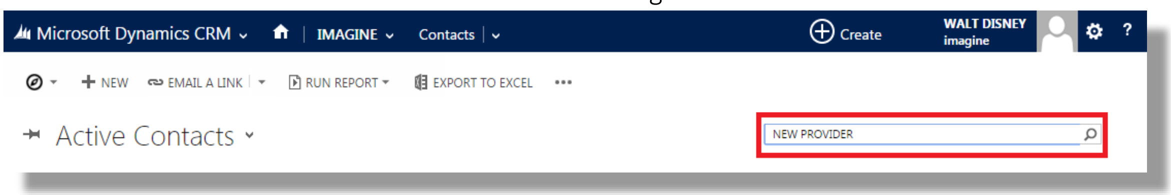


Figure 11 – Search Contacts

3. Click the magnifying glass to start the search
4. From the Search Results window, select the Contact by clicking on the link to display the Contact Front Page

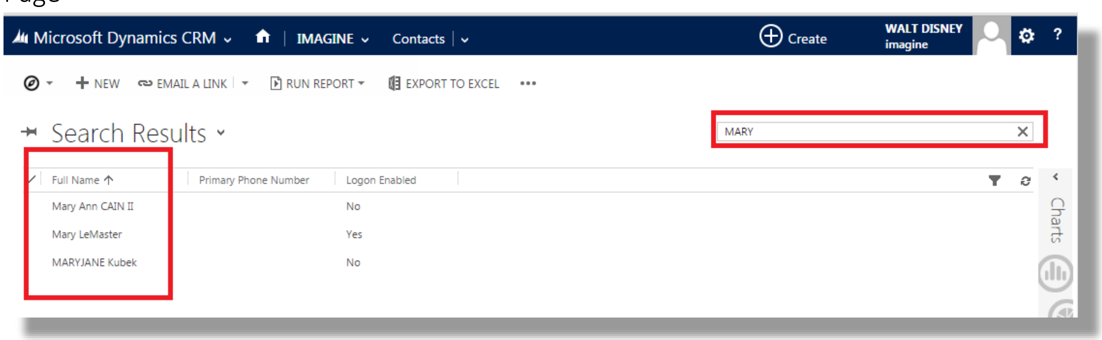


Figure 12 - Select Contact

Deactivate a Contact

1. From the Contact Front Page click the 'Deactivate' button
2. Confirmation page will display. Click 'Deactivate'. Contact will not display in Active Contact list.

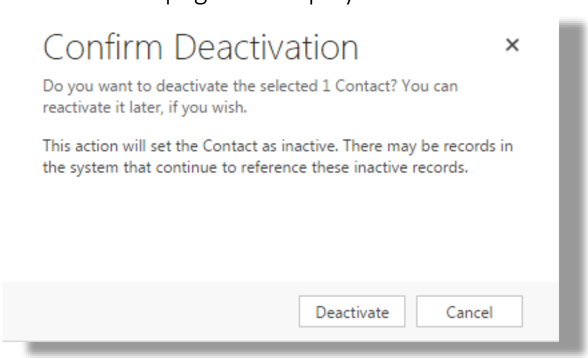
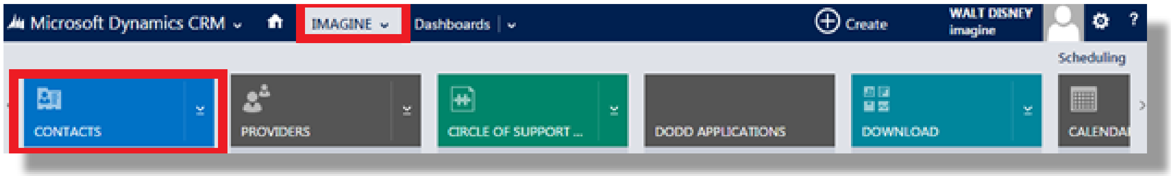


Figure 13 – Deactivate Contact

Activate a Deactivated Contact

1. Click ‘IMAGINE’ dropdown and select ‘Contacts’ tile. The Active Contacts list view will display



2. Change the List View to ‘Inactive Contacts’

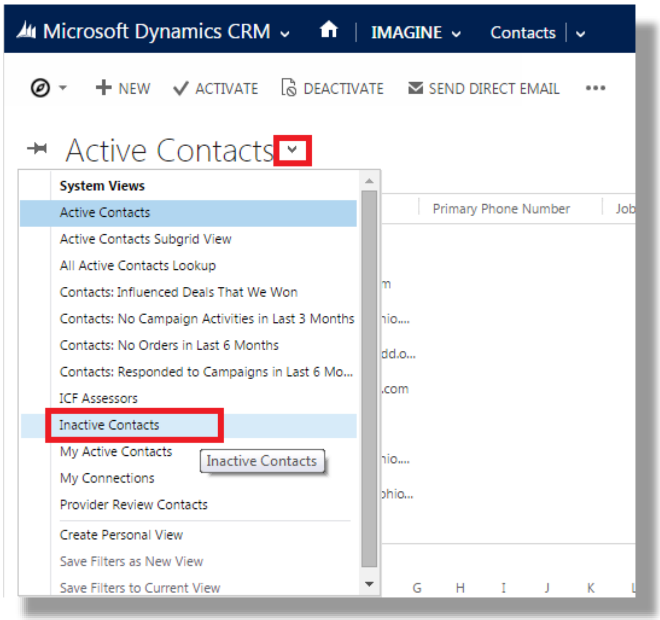


Figure 14- Inactive Contacts List View

3. Enter Contact search criteria in the search box to the right
4. Click the magnifying glass to start the search or select Contact from search results

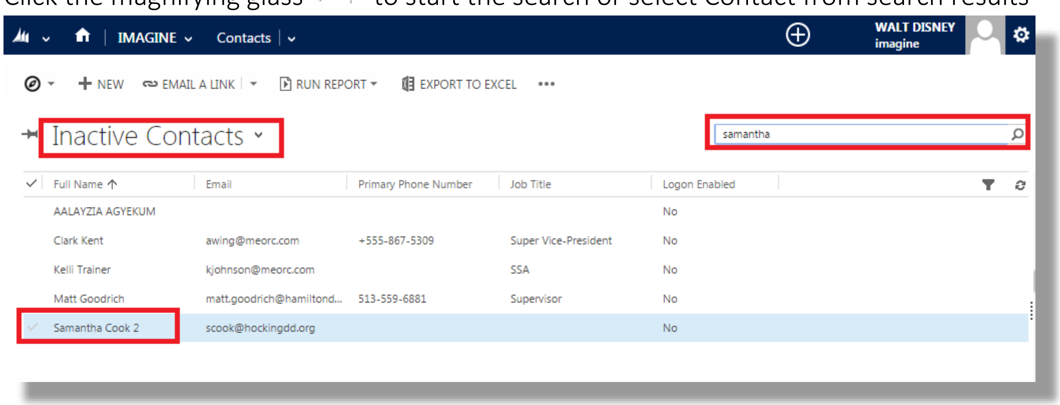


Figure 15- Inactive Contacts search

5. From the Search Results window, select the Contact by clicking on the link to display the Contact Front Page
6. From the Contact Front Page click the 'Activate' button

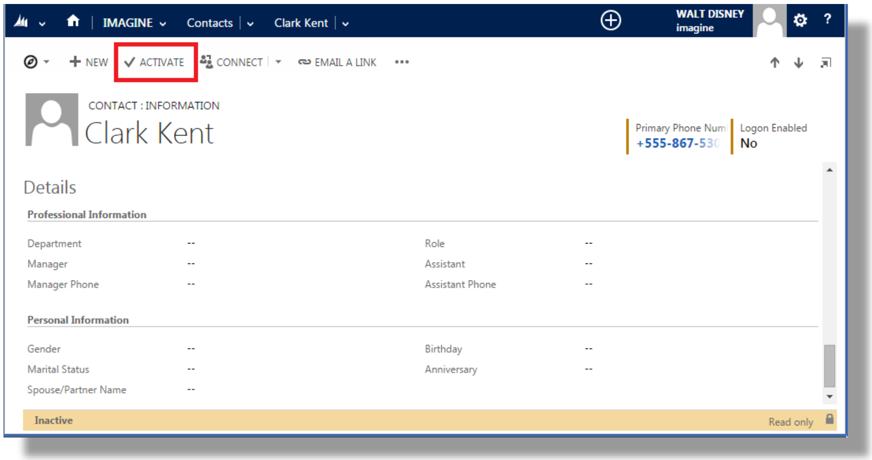


Figure 16- Activate Screen

7. Confirmation page will display. Click 'Activate'. Contact will now display in the Active Contact list.

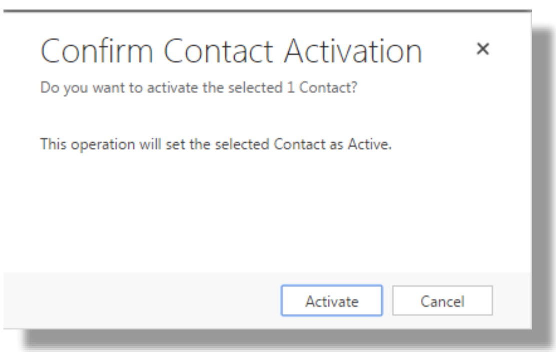


Figure 17 – Confirm Contact Activation

View Active Contacts

1. Click ‘IMAGINE’ dropdown and select ‘Contacts’ tile. The Active Contacts list view will display

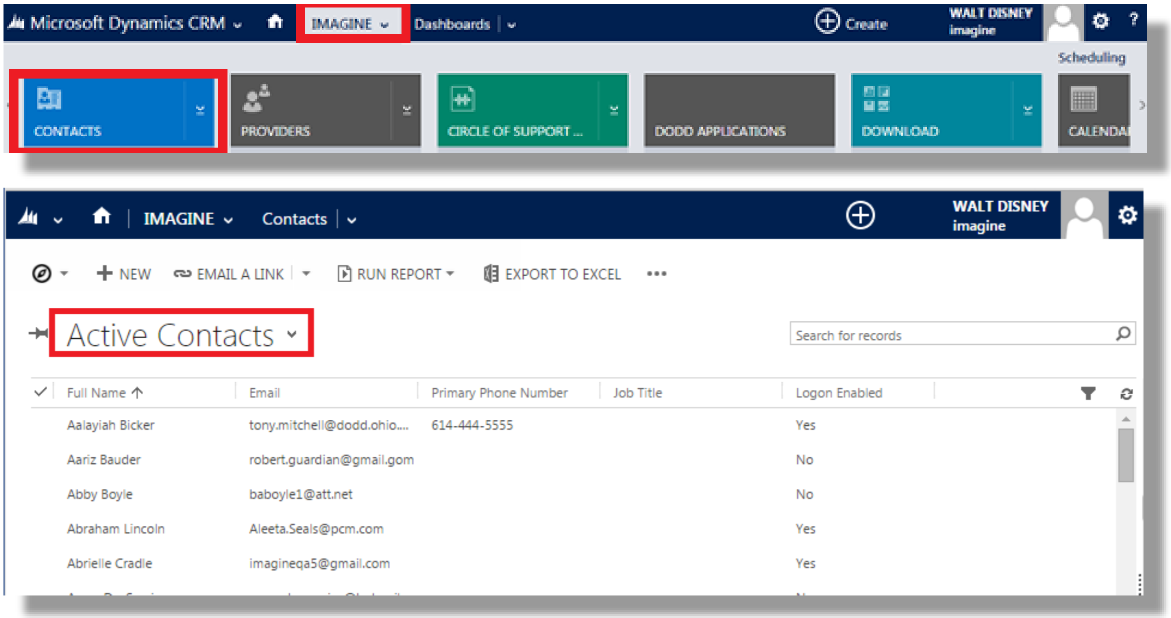


Figure 18- Active Contacts List View

Connections

Connections are Contacts who are directly associated with the Individual.

Making a Connection

1. From the Individual Front Page, click the 'Connect' button

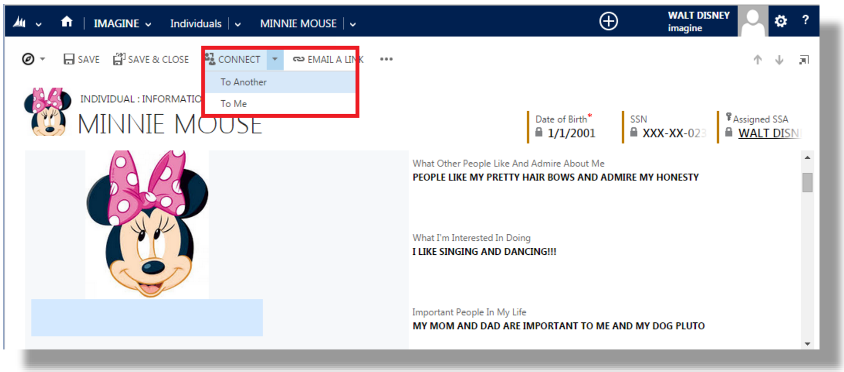


Figure 19- Making a Connection

2. Select 'To Another'; New Connection box will appear

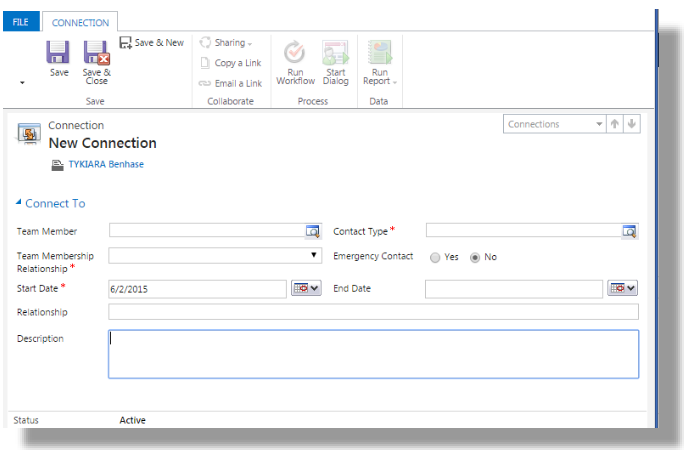


Figure 20 – Connection/Assign Team Member

3. Click in Team Member field to begin search

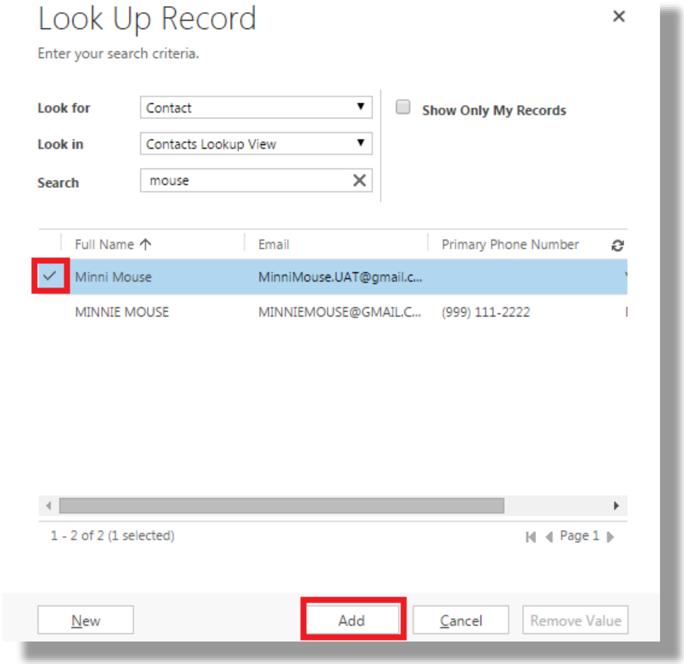


Figure 21- Connection Lookup

4. Select contact by clicking the check box next to the name of the contact and clicking 'Add'.
5. Enter Team Member Relationship
6. Enter Contact Type

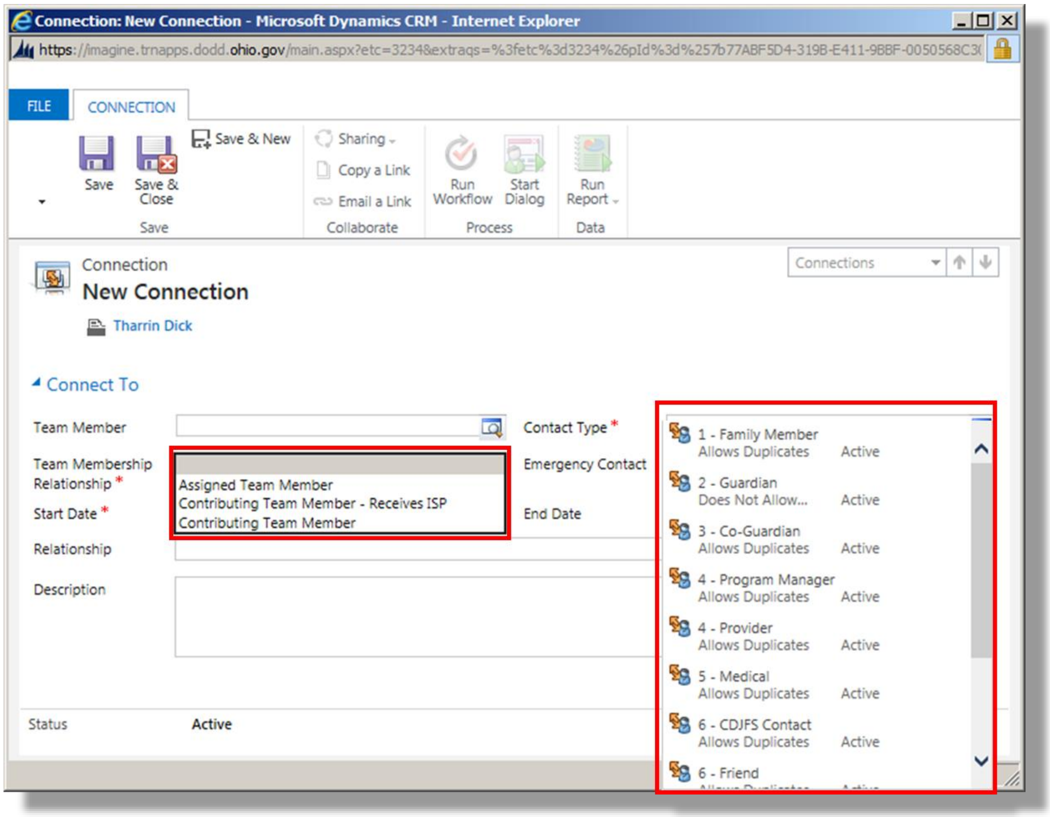


Figure 22 - Team Membership

Note: Team Memberships are defined in the following way:

Assigned Team Member – Will have portal access and can provide feedback to outcomes, discovery results, action plans, and the ISP

Contributing Team Member – Receives ISP – Does not have portal access however, is on the list of people that who will receive a copy of an ISP

Contributing Team Member – Does not have portal access. Can submit written feedback for the SSA to upload.

7. Enter all other applicable data
8. Click ‘Save & Close’

Add a Family Member/Guardian

*Family member or Guardian must first be added as a ‘Contact’. Family member will only have access via the portal if they are an Assigned Team Member.

1. From the Individual’s Front Page, click the ‘Connect’ button
2. The ‘Active Connection Associated View will display. Click the ‘Connect’ button
3. Select ‘To Another’; New Connection box will appear
4. Click in ‘Team Member’ lookup. A pop up box will appear

5. Scroll down and click 'Look Up More Records'
6. Select Contact from results list; Contact name will populate the 'Team Member' field

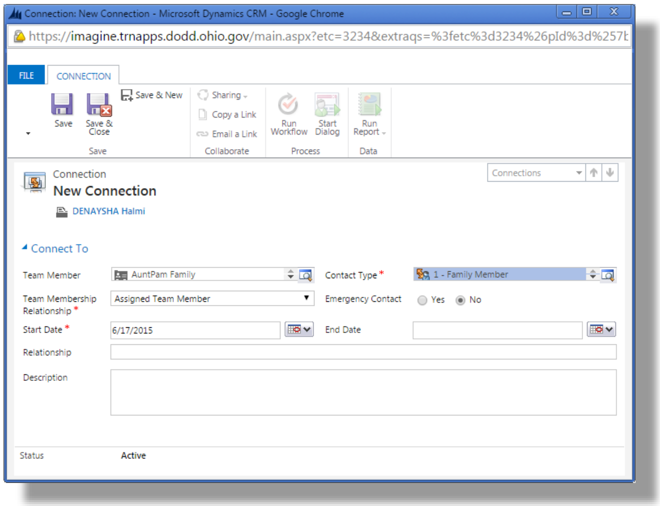
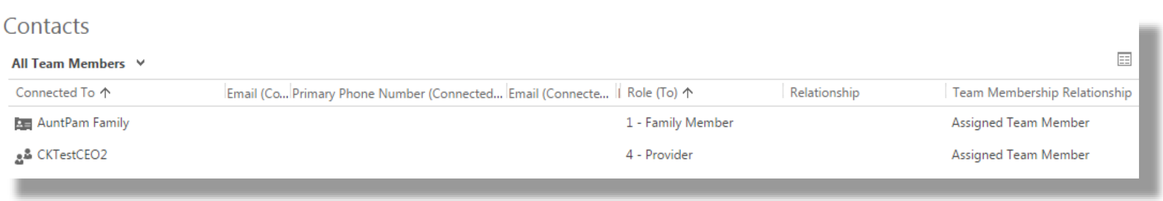


Figure 23 – Add Family Member or Guardian

7. Click the dropdown for 'Contact Type' and select 'Family' or 'Guardian'; Contact Role type will return to Contact Type field
8. Click in 'Team Membership' field and select 'Assigned Team Member'
9. Enter Start Date
10. Click 'Save & Close'; Family Member or Guardian will now display as a connection


Contacts

All Team Members

Connected To ↑	Email (Co...	Primary Phone Number (Connected...	Email (Connecte...	Role (To) ↑	Relationship	Team Membership Relationship
AuntPam Family				1 - Family Member		Assigned Team Member
CKTestCEO2				4 - Provider		Assigned Team Member

Figure 24 – Connection List

Team Members without Access

1. From Individual Front Page, click on the 'Contacts' link
2. Click the dropdown next to the 'All Team Members' list view and select 'Contacts without Access to Imagine'. List of contact without Imagine access will display

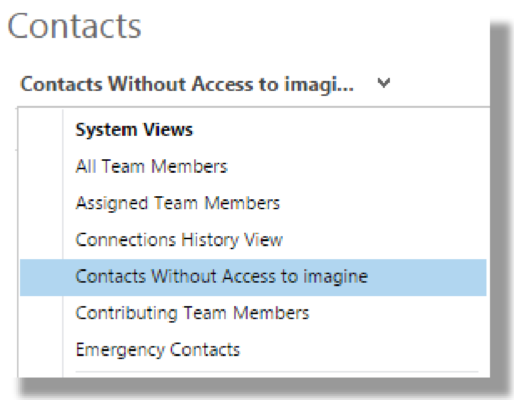


Figure 25 – Team Members without Access

Emergency Contacts

1. When adding a 'New Connection'(see connections section) select the radio button for Emergency Contact

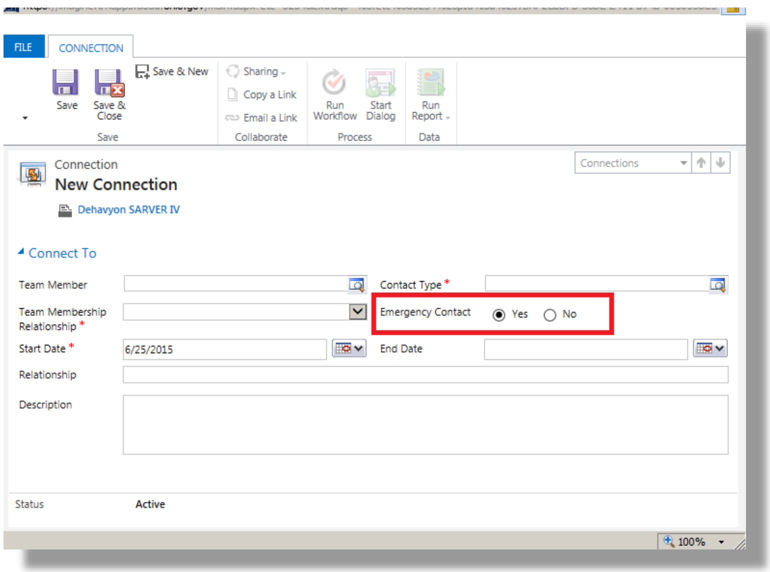


Figure 26 – Emergency Contacts

2. From Individual's Front Page, click on the 'Contact's' section
3. Click the dropdown next to the 'All Team Members' List View and change it to 'Emergency Contacts' List View

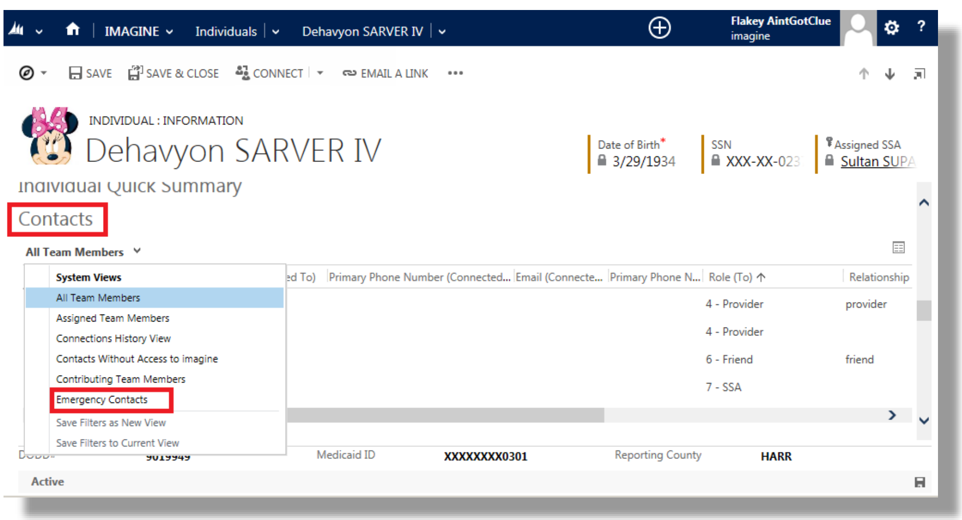


Figure 27- Contact List View

Discovery

Discovery is the process of finding out what is important to and for the Individual. It is also understanding risks, and how to address the risks, who the important people in their life are, what they want to do with their life, health info, day to day life info, etc. All the initial discovery information, discovery module information and so on and how the team knows what outcomes the person is interested in pursuing

Discovery Management

Discovery Management allows you do the following:

- Advance Discovery through phases
- Reset to Draft – Internal
- View the contents of INDIVIDUAL discovery modules using the hyperlinks for each module
- View Discovery History, if preferred instead of going to the Discovery History tile. Each version of the published Discovery Results will be displayed here

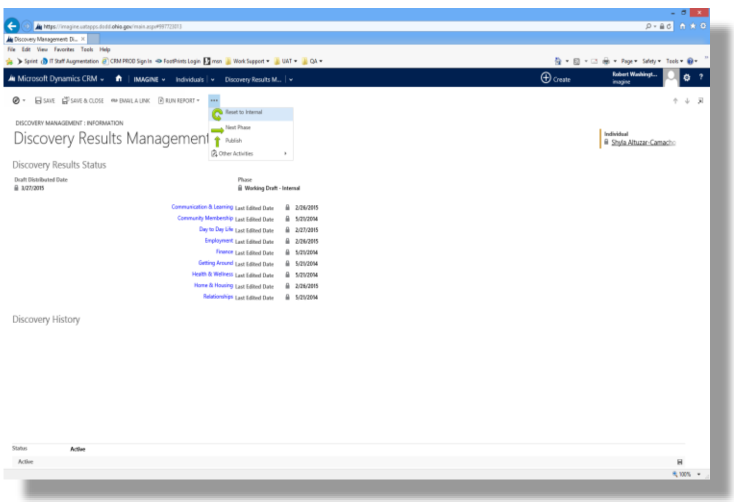


Figure 28 – Discovery Management

Discovery Phases

Phase 1 – Working Draft- Internal

SSA enters the information. Portal users cannot see it.

Phase 2 – Working Draft- Review Required

The SSA is entering information. Portal users can’t see it yet.
Move in a group from Discovery Management (you cannot move them one by one in the module)
It only goes to this phase if your Supervisor has a setting to review your Discovery before you can move them to Draft Distributed (this should be by SSA)

Phase 3 – Working Draft- Review Complete

The SSA Supervisor reviewed the Discovery Results and sent to next phase

Phase 4 – Draft Distributed

If the SSA Supervisor does not have review setting for the Discovery Results they will be in this phase after the SSA sends them to the next phase the first time.
Discovery Results can now be seen by the portal users. The portal users will provide feedback.
If there are assigned team members that do not use the ***imagineIS***, the SSA will need to send the Discovery Results to them and gather feedback manually.

NOTE: if Discovery has been previously published, the PDF on the front page is the published version, not the updated draft. Each time Discovery is published a new copy is generated in Working Draft-Internal mode.

Phase 5 – Complete – Ready to Publish

The SSA has received feedback from the portal users, made necessary changes and the Discovery Results are ready to be published.

Phase 6 – Publish

This phase is brief but occurs when you click 'Publish' The popup informs you it will create a pdf, which is does, and reset the Discovery to 'Working Draft – Internal'. It does not remain in 'Current' once Discovery Results are published. A new set of Discovery Results, that is prepopulated with what was entered earlier will automatically be created and set to Working Draft-Internal after the Discovery is published.
Discovery must be published to show on the Individual's Front Page in the Discovery Quick Summary.

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Discovery Quick Summary

1. From Individual Front Page click on 'Discovery Quick Summary' Link; Summary of Discovery modules and existing supports will display

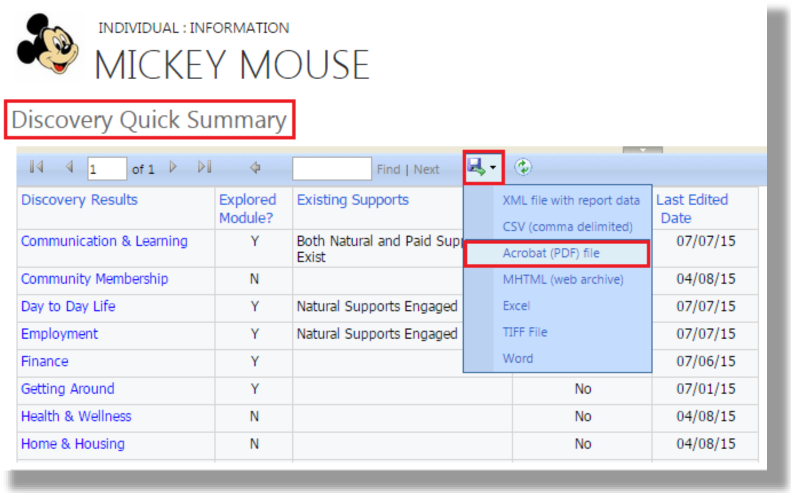
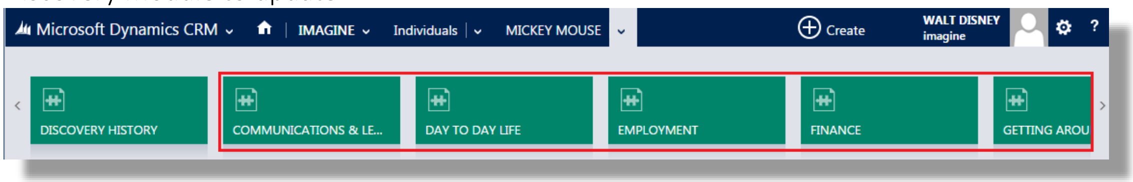


Figure 29 – Discovery Quick Summary

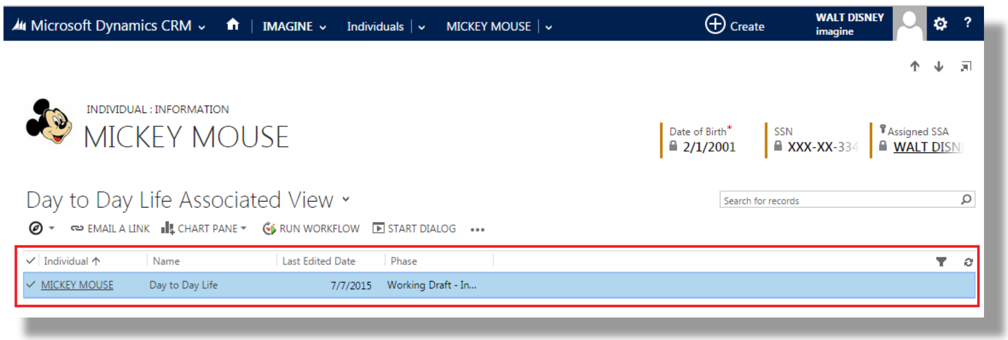
2. To Export the Discovery Quick Summary click on the Export button
3. Select 'Acrobat (PDF) file'; A PDF file will download to your desktop

Discovery Results

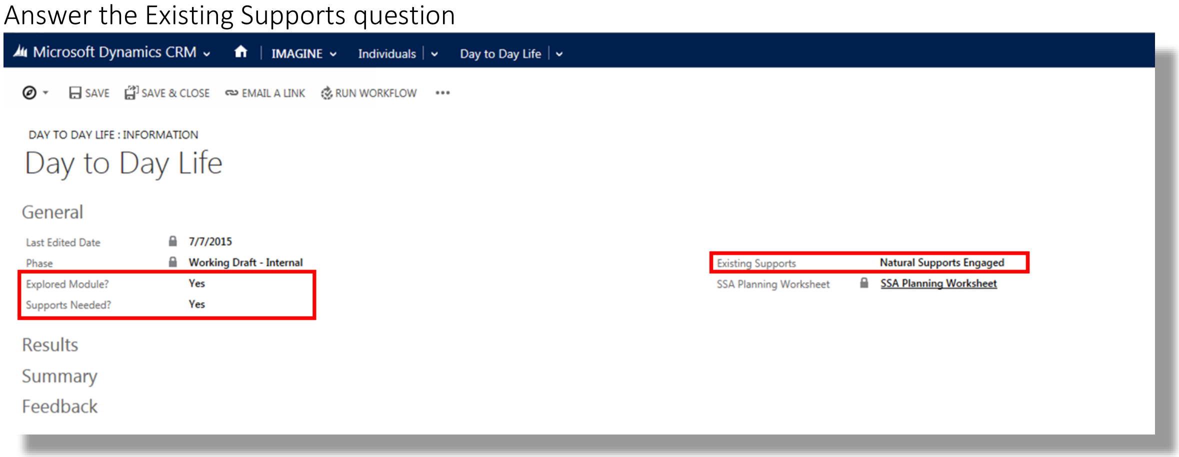
1. From the Individual's Front Page, select the dropdown next to the Individual's name and select the Discovery Module to update



2. Click on the Link in the List View



3. Click in the 'Explored Module?' field to change 'no' to 'yes'
4. If Supports are needed, click in this field to change 'no' to 'yes'
5. Answer the Existing Supports question



6. Complete remaining sections by clicking '+' to add the section data

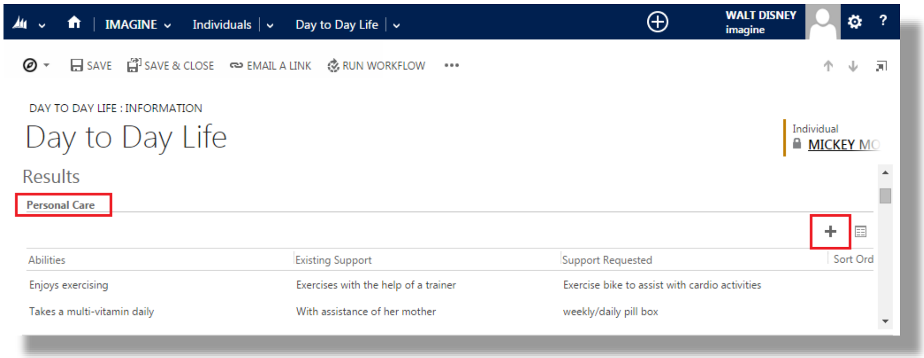


Figure 30 – Discovery Results

7. Click 'Save & Close' per each section before moving on to another section
   Note: Save must be selected before navigating away from this screen. If not, all newly entered information will be lost.

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

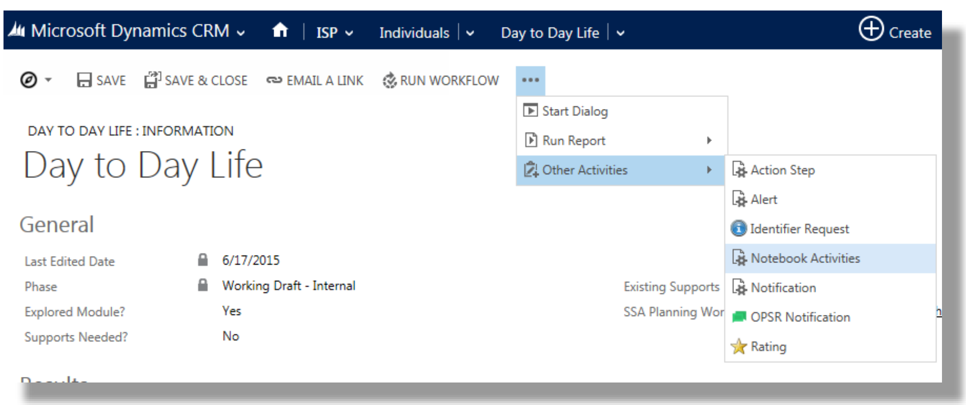


Figure 31 – Notebook Activities

4. Enter feedback information

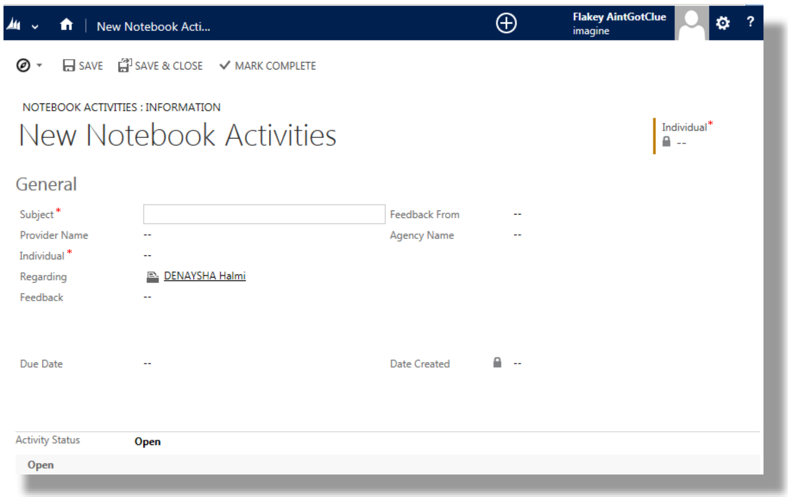


Figure 32 – New Discovery Feedback

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

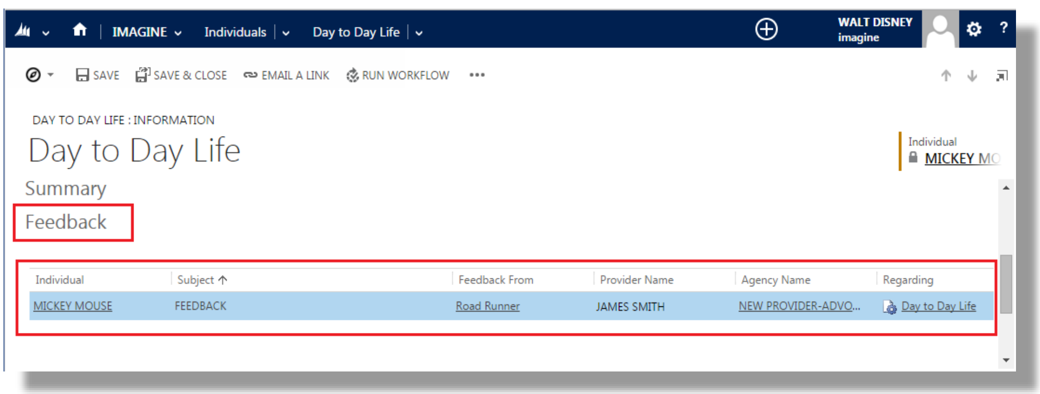


Figure 33 –Feedback List

Review Discovery Results Feedback

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

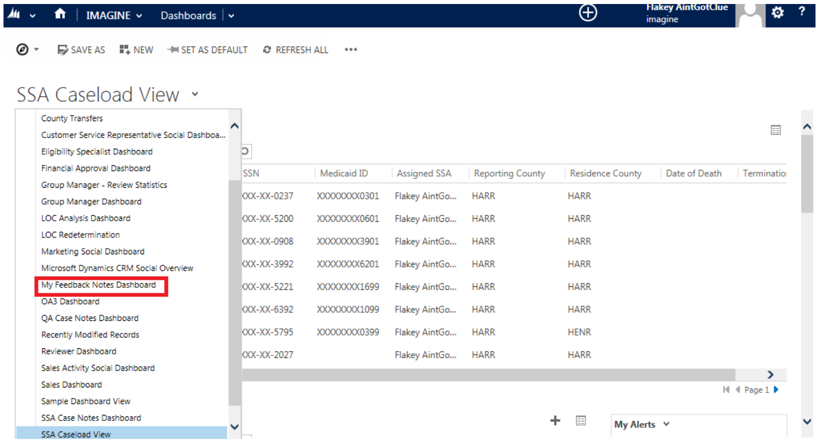


Figure 34- Caseload View

2. Click the 'Subject' link to review Feedback

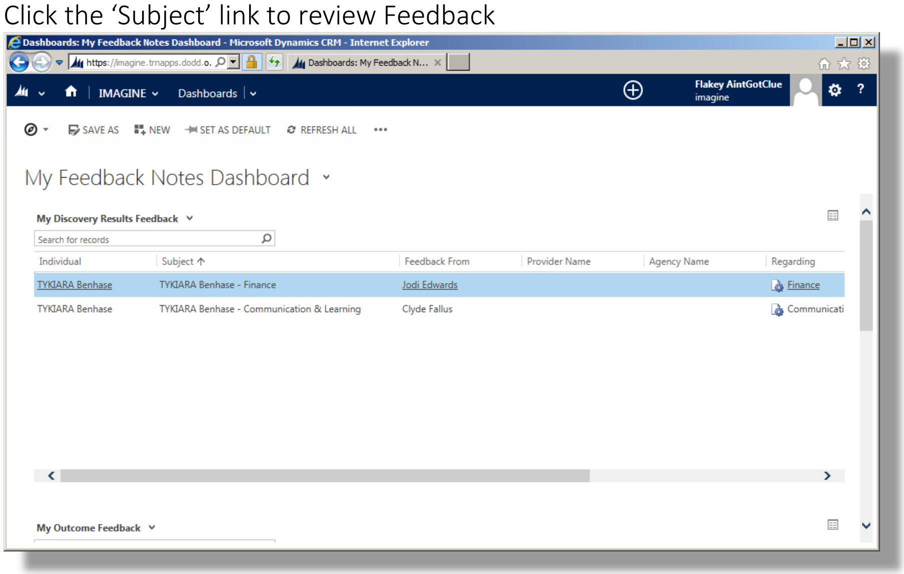


Figure 35- My Feedback Notes Dashboard

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

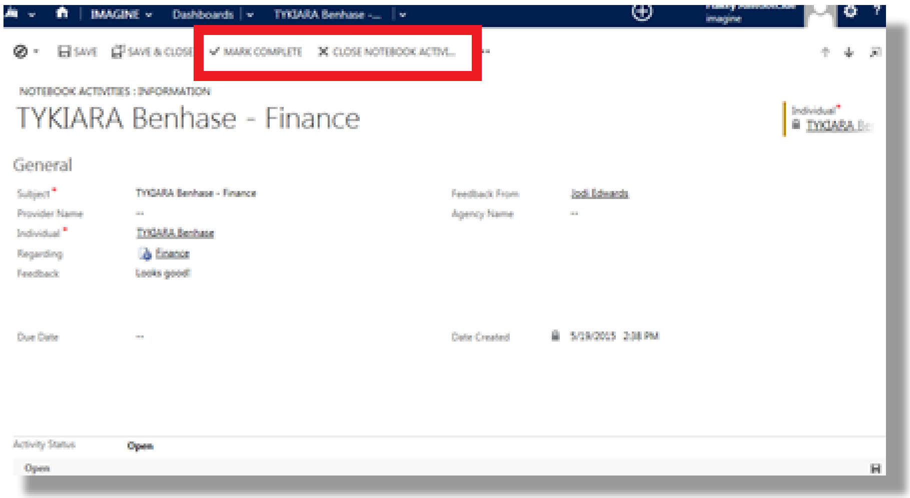
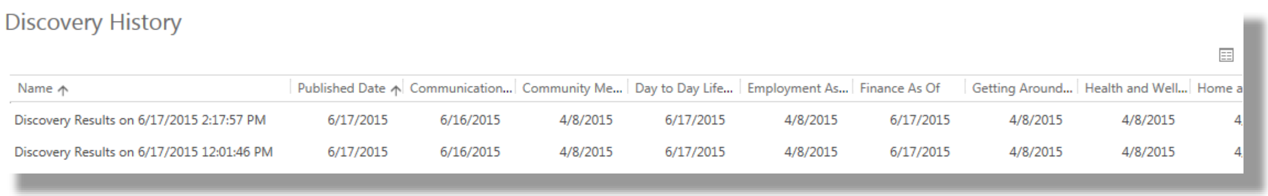


Figure 36- Feedback Complete

Discovery History

1. From the Individual's Front Page, select the dropdown next to the Individual's name and select the 'Discovery History' tile. List View defaults to 'Active Discovery Management'
2. Click the Discovery Results Management link, this opens the discovery results status screen (see 'Discovery Results' above)



Discovery History

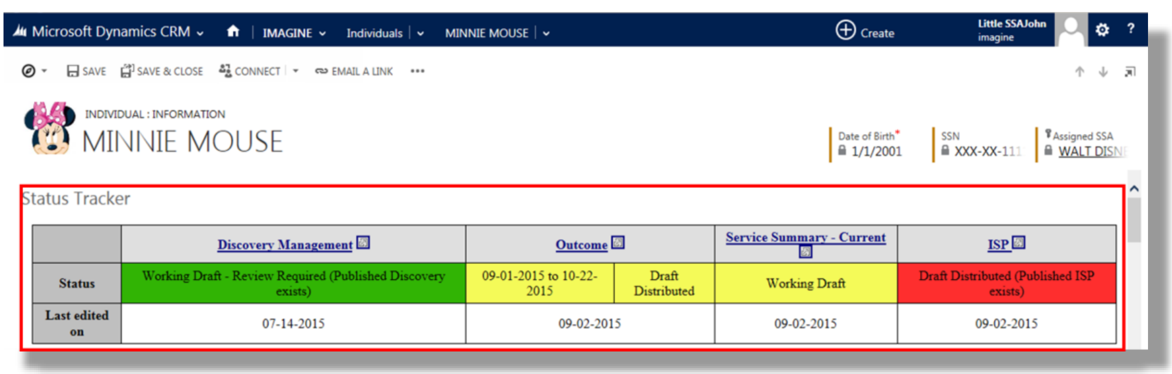
Name	Published Date	Communication...	Community Me...	Day to Day Life...	Employment As...	Finance As Of	Getting Around...	Health and Well...	Home a
Discovery Results on 6/17/2015 2:17:57 PM	6/17/2015	6/16/2015	4/8/2015	6/17/2015	4/8/2015	6/17/2015	4/8/2015	4/8/2015	4
Discovery Results on 6/17/2015 12:01:46 PM	6/17/2015	6/16/2015	4/8/2015	6/17/2015	4/8/2015	6/17/2015	4/8/2015	4/8/2015	4

Figure 37 – Discovery History

Status Tracker

The Status tracker displays the phase status of Discovery, Outcomes, Service Summary and ISPs. The date on the screen is the most recent item that was created. The ISP will remain red until the discovery management, outcome and service summary are all green. At that point the ISP will turn green and can be phased to published status.

The underlined title is hyperlinked and when selected will go to that item for maintenance. The square icon next to the name will provide a preview print of the item.



	Discovery Management	Outcome		Service Summary - Current	ISP
Status	Working Draft - Review Required (Published Discovery exists)	09-01-2015 to 10-22-2015	Draft Distributed	Working Draft	Draft Distributed (Published ISP exists)
Last edited on	07-14-2015	09-02-2015		09-02-2015	09-02-2015

Figure 38 - Status Tracker

Front Page

The front page is a positive introduction of the person.

1. From Individual's Front Page, click in the field to update

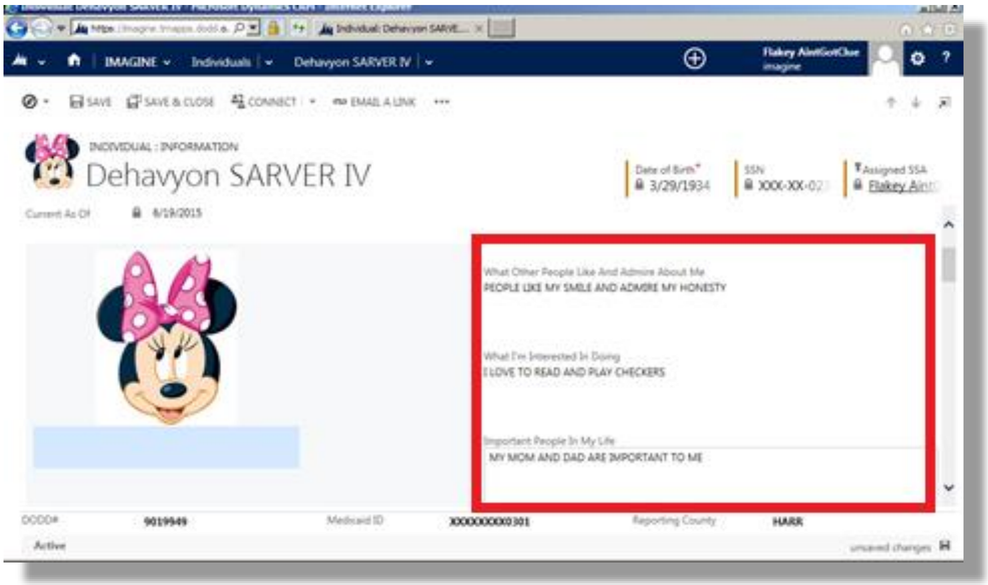


Figure 39- Demographics

2. Enter data:
    a. What Other People Like And Admire About Me
    b. What I'm interested in doing
    c. Important People in My Life
    d. Email
    e. Phone information
3. Click 'Save' or ' & Close'

Additional Demographics

This field is used to capture the Local ID for Gatekeeper, Infallible or County Budget Line

1. From Individual's Front Page, click on the 'Additional Demographics' section
2. Click the '+' button to add additional 'Local ID' numbers, a pop up will display

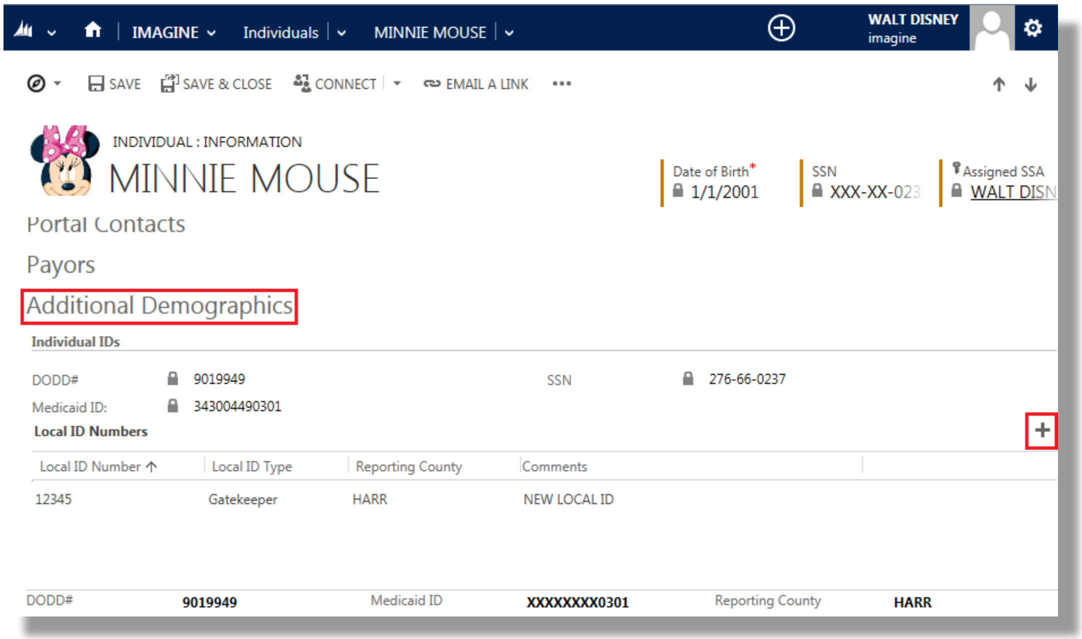
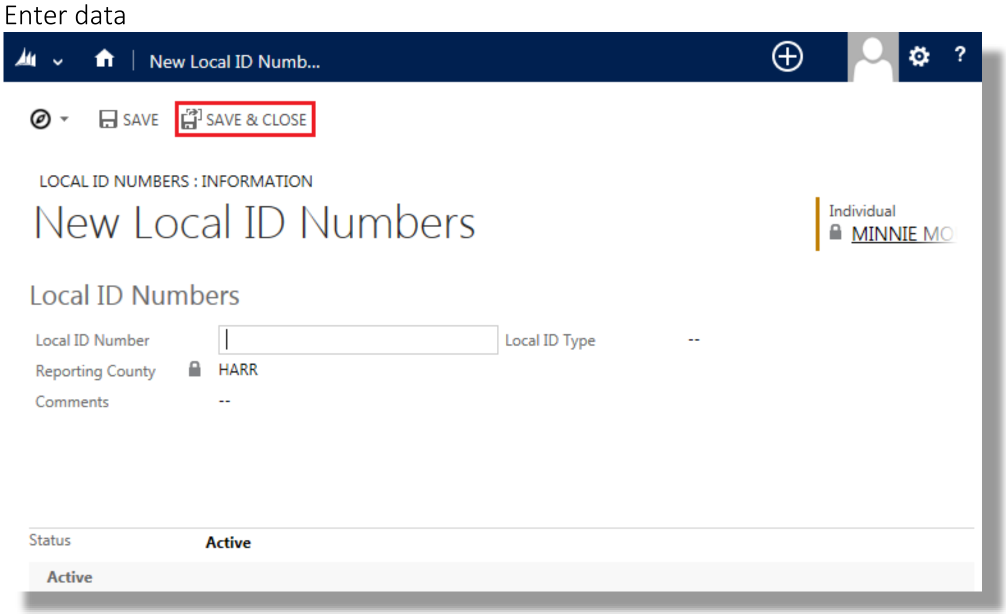


Figure 40 – Additional Demographics

3. Enter data



4. Click 'Save & Close'

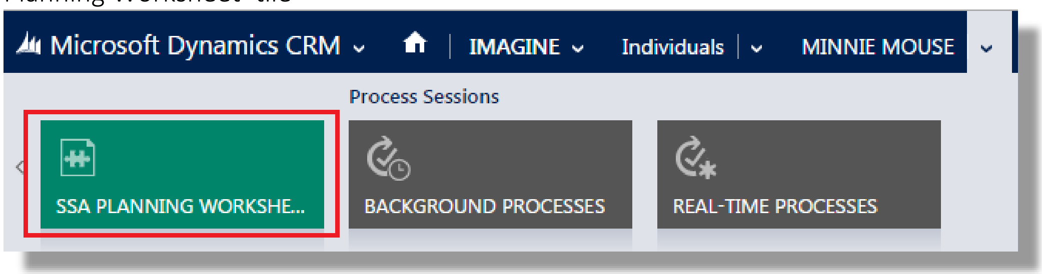
SSA Planning

The SSA Planning Worksheet provides a space for the SSA to enter general notes regarding a specific Discovery module. It allows for the SSA to document potential strategies, possible services/supports/funding needed for the selected Discovery or Outcome.

SSA Planning Worksheets

Essential health

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'SSA Planning Worksheet' tile



2. From the SSA Planning Worksheet Associated List View, click on the link for the 'SSA Planning Worksheet'. The SSA Planning Front Page will display

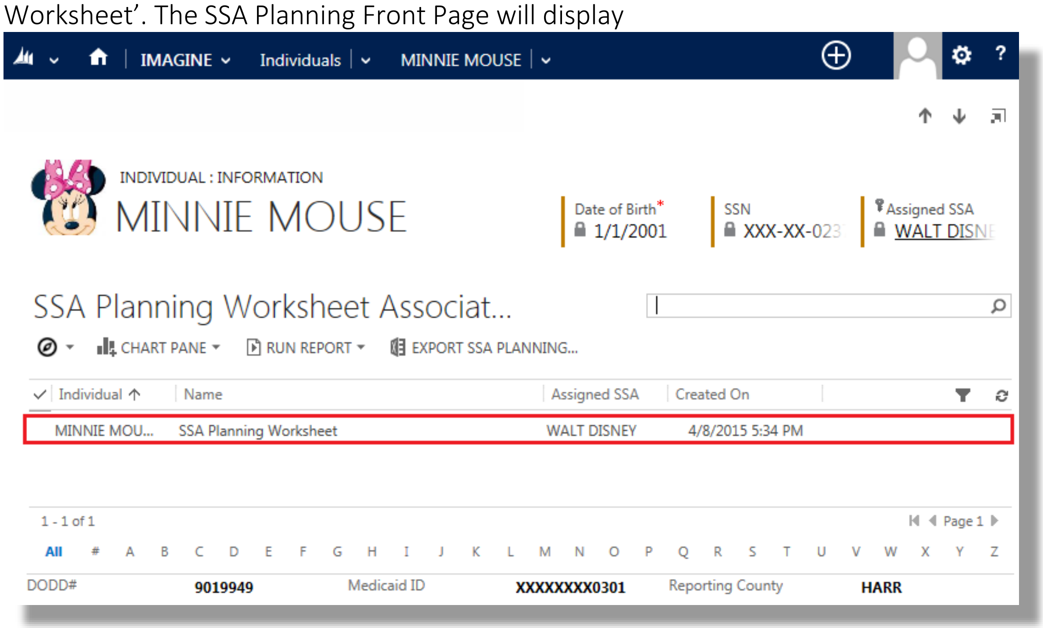


Figure 41- SSA Planning Worksheet

3. Click on the 'Discovery Worksheets' section

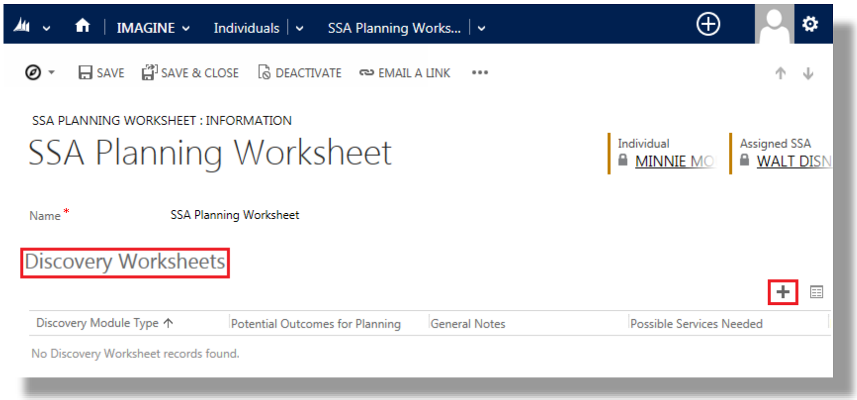


Figure 42 - SSA Planning; Discovery Worksheet

4. Click the '+' button to add a new worksheet, a pop up box will display

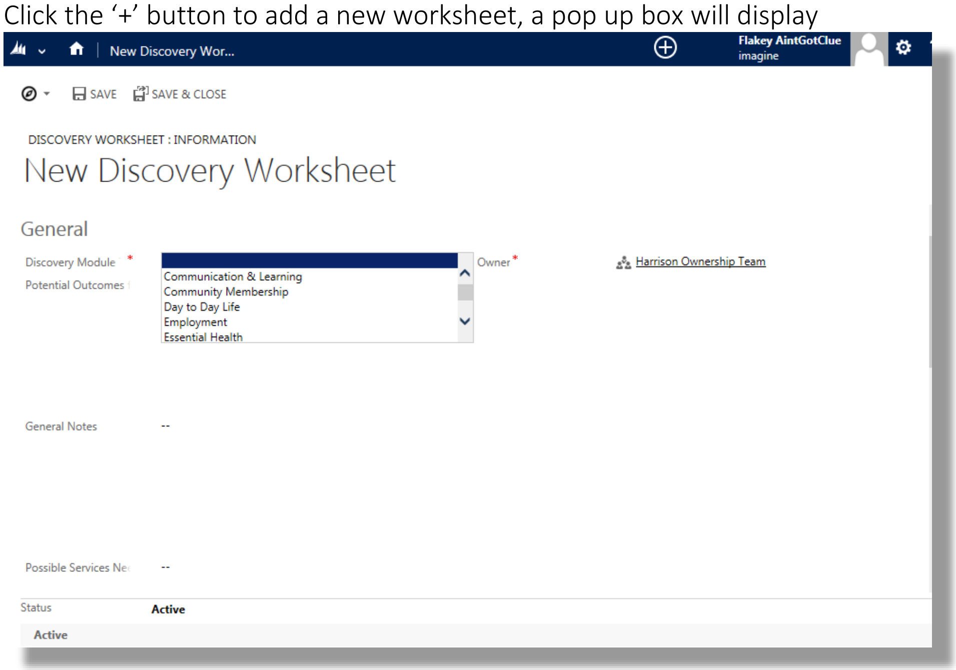


Figure 43- Essential Health Discovery Worksheet

5. Select the 'Essential Health' Discovery Module
6. Enter the Essential Health information

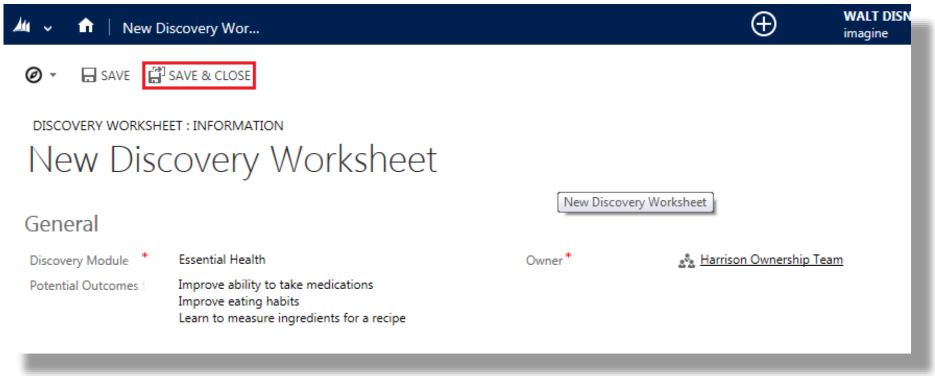


Figure 44- Discovery Worksheet; Essential Health

7. Click 'Save & Close'
8. Once you have returned to the SSA Planning Worksheet click 'Save & Close'.

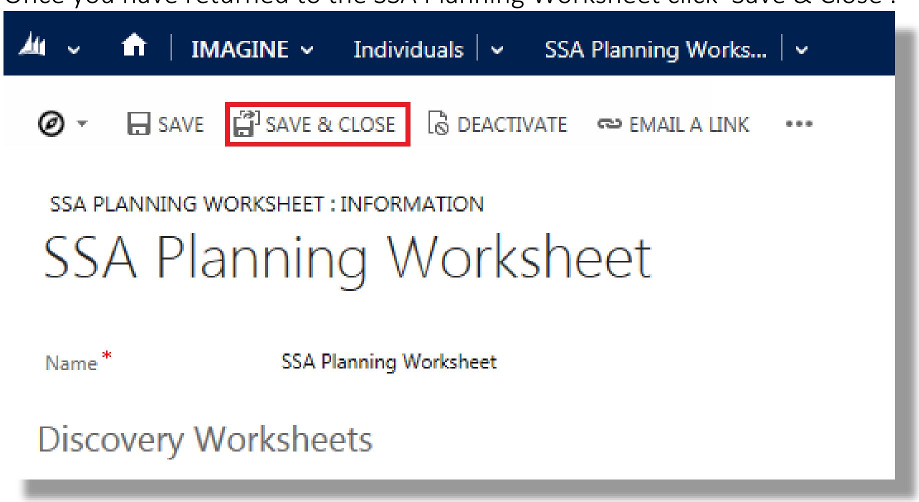


Figure 45- SSA Planning Worksheet Save & Close

Finance

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'SSA Planning Worksheet' tile
2. From the SSA Planning Worksheet Associated List View, click on the link for the SSA Planning Worksheet. The SSA Planning Front Page will display
3. Click on the 'Discovery Worksheets' section
4. Click the '+' button to add a new worksheet, a pop up box will display
5. Select the 'Finance' Discovery Module
6. Enter the 'Finance' information
7. Click 'Save & Close'

Communication & Learning

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'SSA Planning Worksheet' tile

2. From the SSA Planning Worksheet Associated List View, click on the link for the SSA Planning Worksheet. The SSA Planning Front Page will display
3. Click on the 'Discovery Worksheets' section
4. Click the '+' button to add a new worksheet, a pop up box will display
5. Select the 'Communication & Learning' Discovery Module
6. Enter the 'Communication & Learning' information
7. Click 'Save & Close'

Day to Day Life

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'SSA Planning Worksheet' tile
2. From the SSA Planning Worksheet Associated List View, click on the link for the SSA Planning Worksheet. The SSA Planning Front Page will display
3. Click on the 'Discovery Worksheets' section
4. Click the '+' button to add a new worksheet, a pop up box will display
5. Select the 'Day to Day Life' Discovery Module
6. Enter the 'Day to Day Life' Discovery information
7. Click 'Save & Close'

Employment

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'SSA Planning Worksheet' tile
2. From the SSA Planning Worksheet Associated List View, click on the link for the SSA Planning Worksheet. The SSA Planning Front Page will display
3. Click on the 'Discovery Worksheets' section
4. Click the '+' button to add a new worksheet, a pop up box will display
5. Select the 'Employment' Discovery Module
6. Enter the 'Employment' Discovery information
7. Click 'Save & Close'

Getting Around

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'SSA Planning Worksheet' tile
2. From the SSA Planning Worksheet Associated List View, click on the link for the SSA Planning Worksheet. The SSA Planning Front Page will display
3. Click on the 'Discovery Worksheets' section
4. Click the '+' button to add a new worksheet, a pop up box will display
5. Select the 'Getting Started' Discovery Module
6. Enter the 'Getting Started' Discovery information
7. Click 'Save & Close'

Home & Housing

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'SSA Planning Worksheet' tile

2. From the SSA Planning Worksheet Associated List View, click on the link for the SSA Planning Worksheet. The SSA Planning Front Page will display
3. Click on the 'Discovery Worksheets' section
4. Click the '+' button to add a new worksheet, a pop up box will display
5. Select the 'Home & Housing' Discovery Module
6. Enter the 'Home & Housing' Discovery information
7. Click 'Save & Close'

Relationships

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'SSA Planning Worksheet' tile
2. From the SSA Planning Worksheet Associated List View, click on the link for the SSA Planning Worksheet. The SSA Planning Front Page will display
3. Click on the 'Discovery Worksheets' section
4. Click the '+' button to add a new worksheet, a pop up box will display
5. Select the 'Relationships' Discovery Module
6. Enter the Relationships Discovery information
7. Click 'Save & Close'

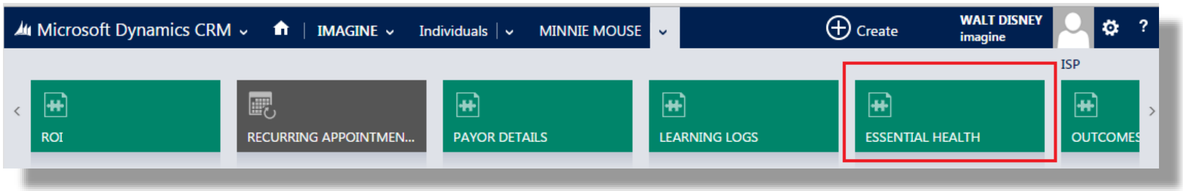
Community Memberships

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'SSA Planning Worksheet' tile
2. From the SSA Planning Worksheet Associated List View, click on the link for the SSA Planning Worksheet. The SSA Planning Front Page will display
3. Click on the 'Discovery Worksheets' section
4. Click the '+' button to add a new worksheet, a pop up box will display
5. Select the 'Community Memberships' Discovery Module
6. Enter the Community Discovery information
7. Click 'Save & Close'

Essential Health

Add Diagnosis

1. From Individual's Front Page, click the dropdown next to the Individual's name and select the 'Essential Health' tile



2. From Essential Health Associated View, click the 'Essential Health' link

3. Enter the Diagnosis information, click '+' to add a new Diagnosis, a pop up box will display

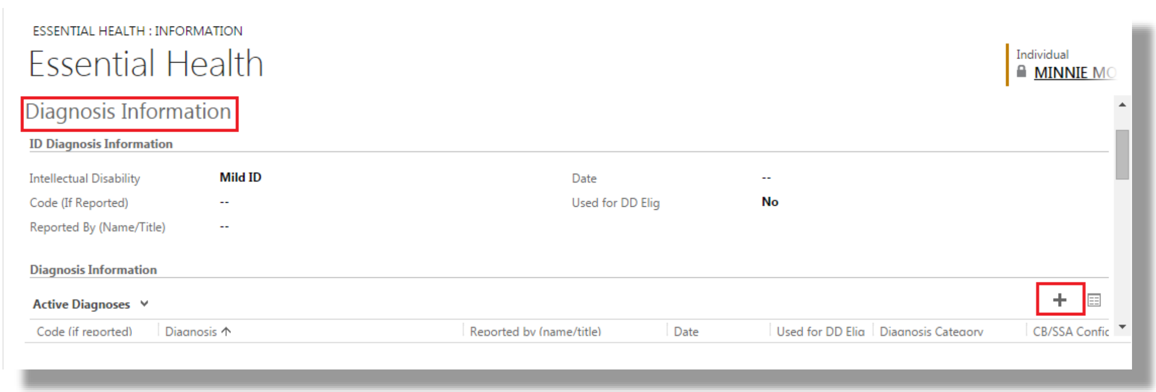


Figure 46- Essential Health Diagnosis

4. Enter Diagnosis information
5. Click 'Save & Close'

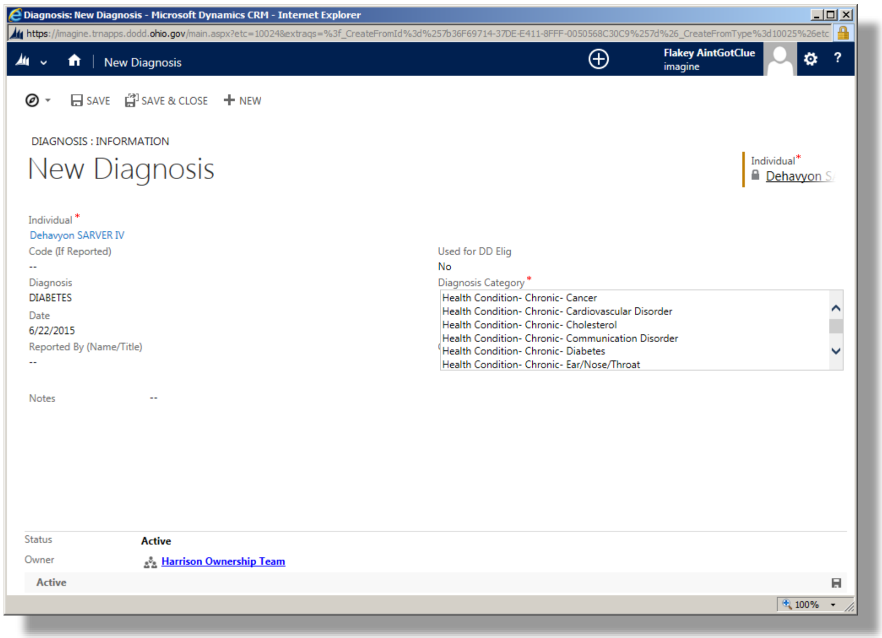


Figure 47- Add Diagnosis

Add Adaptive Devices

1. From Individual's Front Page, click the dropdown next to the Individual's name and select the 'Essential Health' tile
2. Click the 'Essential Health' link
3. From Essential Health Front Page, scroll down to 'Adaptive Devices'
4. Click on the 'Adaptive Devices' link
5. Click '+' to add New Adaptive Device'; a pop up box will display

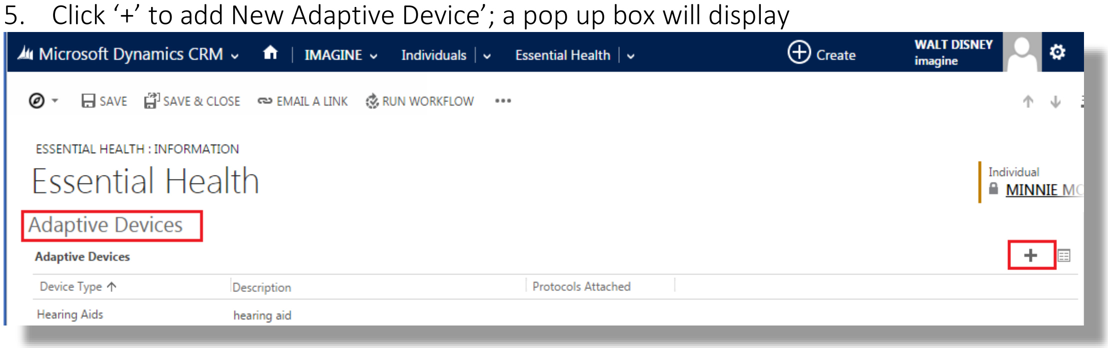


Figure 48 - Add Adaptive Devices

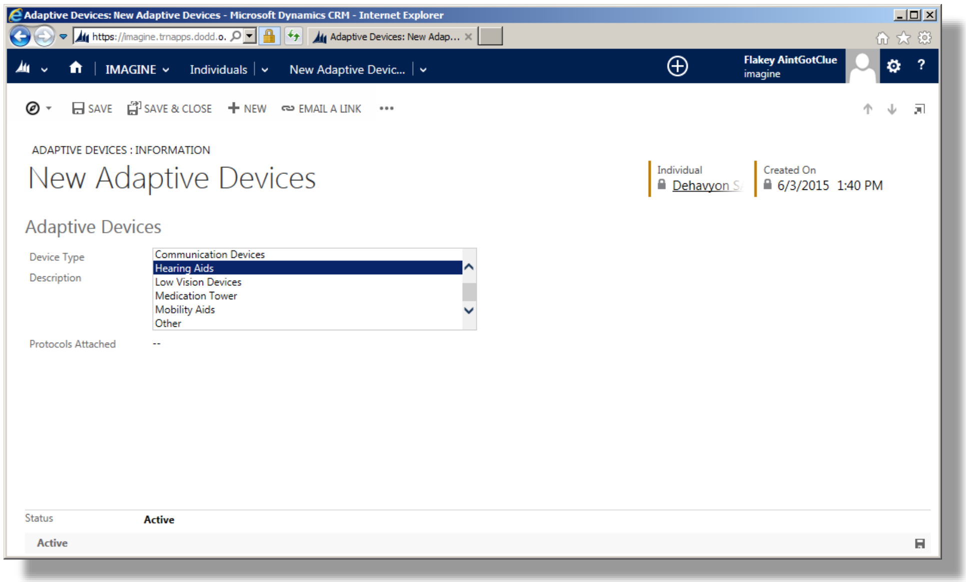


Figure 49- Add Adaptive Device

6. Enter Adaptive Device information
7. Click 'Save & Close'

Add Allergies

1. From Individual's Front Page, click the dropdown next to the Individual's name and select the 'Essential Health' tile
2. Click the 'Essential Health' link From Essential Health Front Page, scroll down to 'Allergies'
3. Click on the 'Allergies' link
4. Click '+' to add 'Allergies'; a pop up box will display

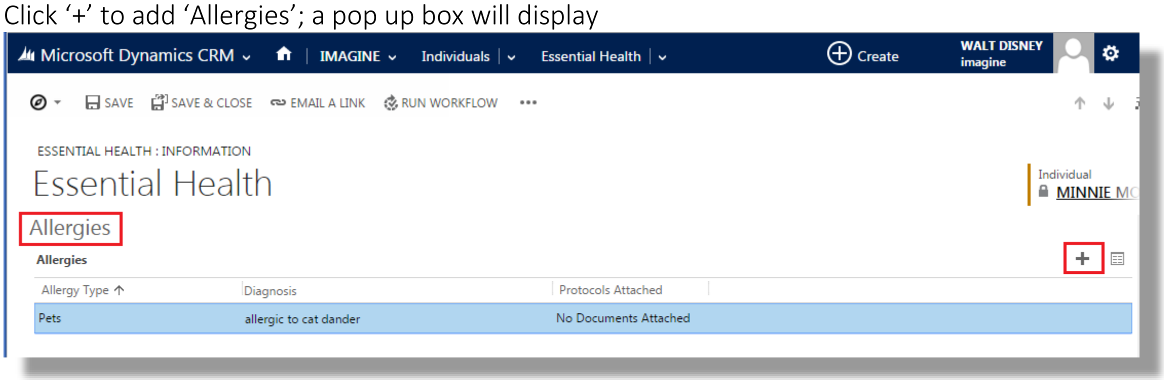


Figure 50 - Add Allergies

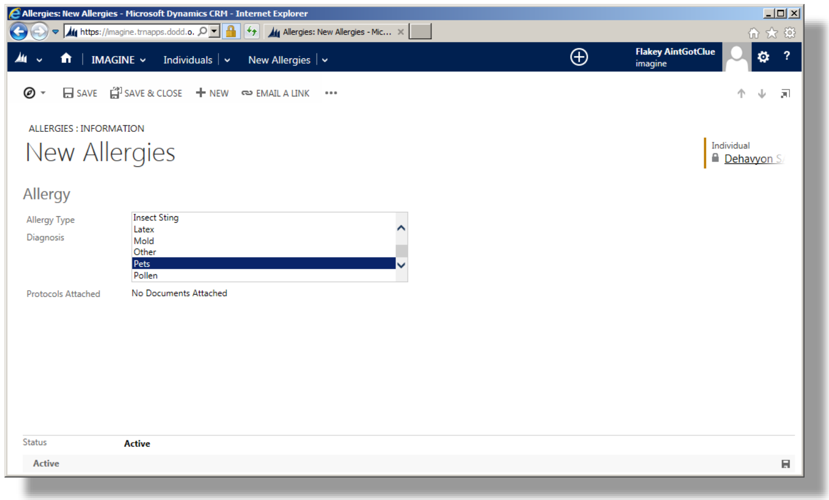


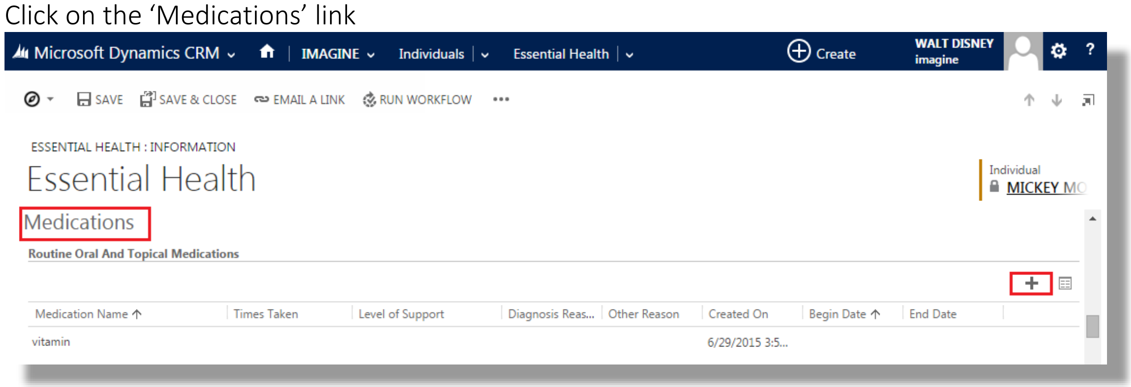
Figure 51- Add Allergies

5. Enter Allergy information
6. Click 'Save & Close'

Medications

The Medications section of Essential Health tracks the Individual's ability to take or manage their medications. Adding every medication used by the Individual is not the intent of this section. Please use the section to document how well the Individual can take Routine Oral/Topical Medication, Injected Insulin, G-J Tube Medications, Glucometer use, and the supports that the Individual requires to maintain their medications as prescribed.

1. From Individual's Front Page, click the dropdown next to the Individual's name and select the 'Essential Health' tile
2. Click the 'Essential Health' link
3. From Essential Health Front Page, scroll down to 'Medications'
4. Click on the 'Medications' link



5. Click in the search box and click the magnifying glass

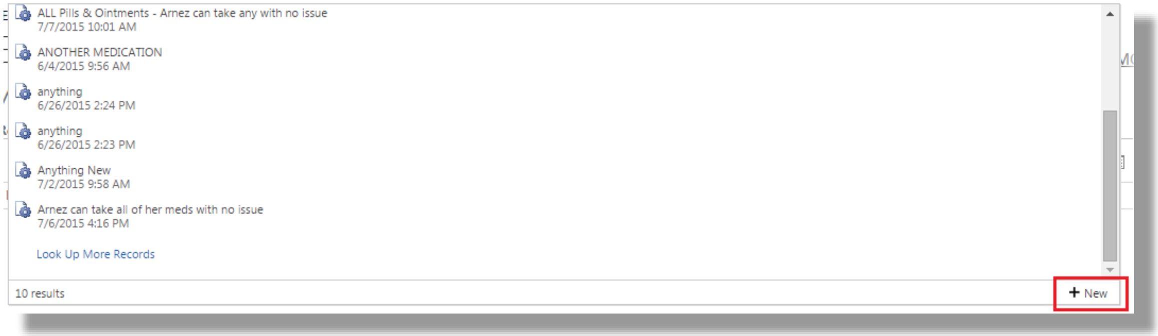
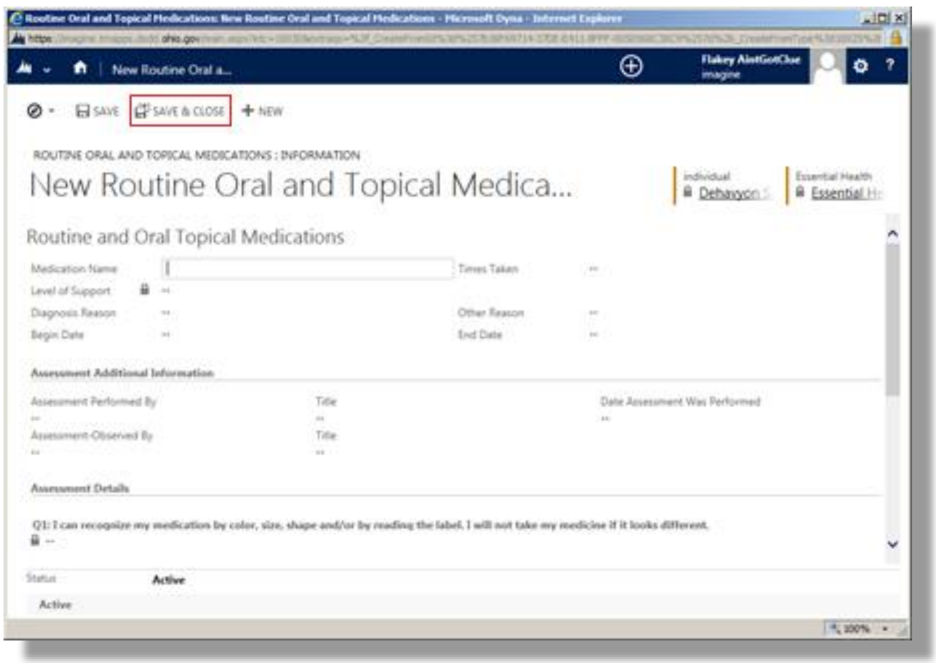


Figure 52- New Medication

6. Enter Medication information

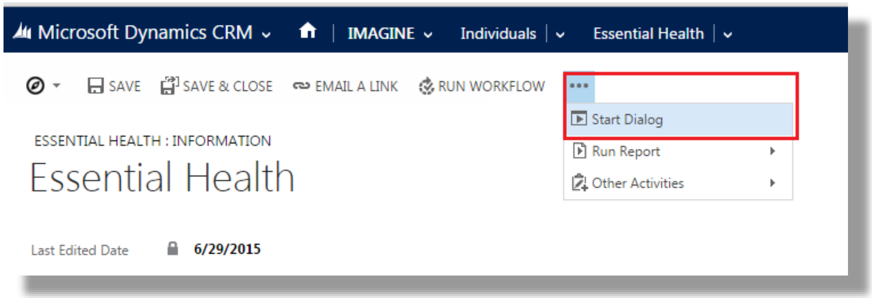


7. Click 'Save & Close'

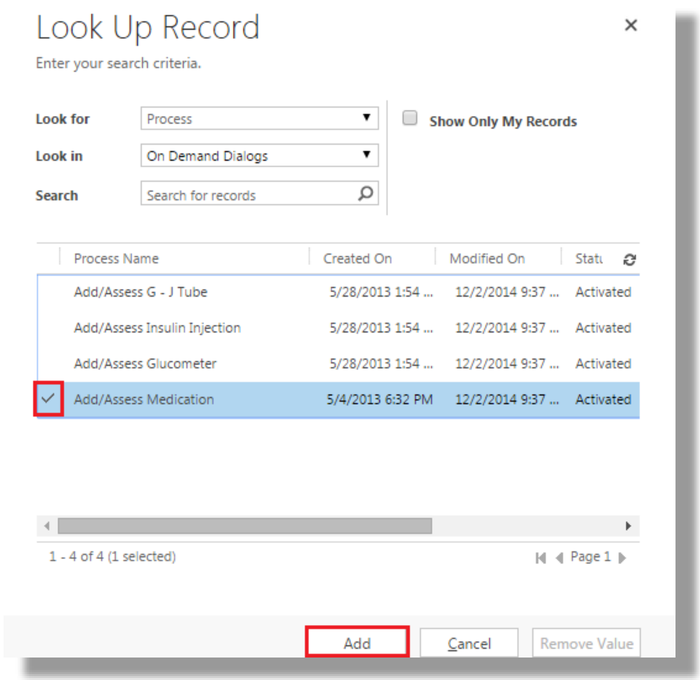
****Note:** If diagnosis is not already established, a new diagnosis can be entered at this time by clicking in the diagnosis field and click 'New'

Add Medication Self-Assessment

1. From Individual's Front Page, click the dropdown next to the Individual's name and select the 'Essential Health' tile
2. Click the 'Essential Health' link
3. From Essential Health Front Page, Click on the More Commands (...)



4. Click 'Start Dialog'
5. Click to the left of the process name to place check mark next to desired process



6. Click the 'Add' button

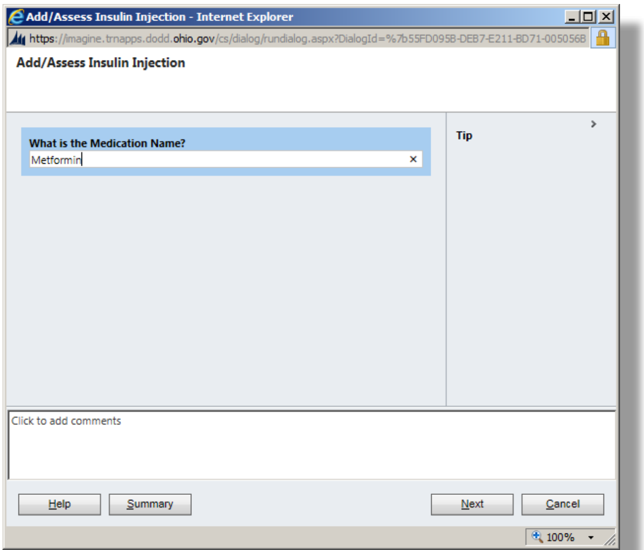


Figure 53- Medication Assessment

7. Click 'Next' and follow the prompts to complete the assessment
8. Click 'Finish'

Add Medication Assessment for ALL Medications

Note: This assessment 'Add's a 'Medication' entry in Essential Health. If the medication has been entered without an assessment this action will create a duplicate entry. Be sure to determine which medications will require an assessment prior to entering medications. Only enter assessments for medication that will require supports. All medications that can be taken and managed by the Individual should be entered without an assessment.

1. From Individual's Front Page, click the dropdown next to the Individual's name and select the 'Essential Health' tile
2. Click the 'Essential Health' link From Essential Health Front Page,
3. Click the 'Medication' section
4. Click the '+' button; a search box will appear
5. Click in the Search icon; a pop up box will display
6. Click the '+New' button
7. Enter Medication name and assessment information

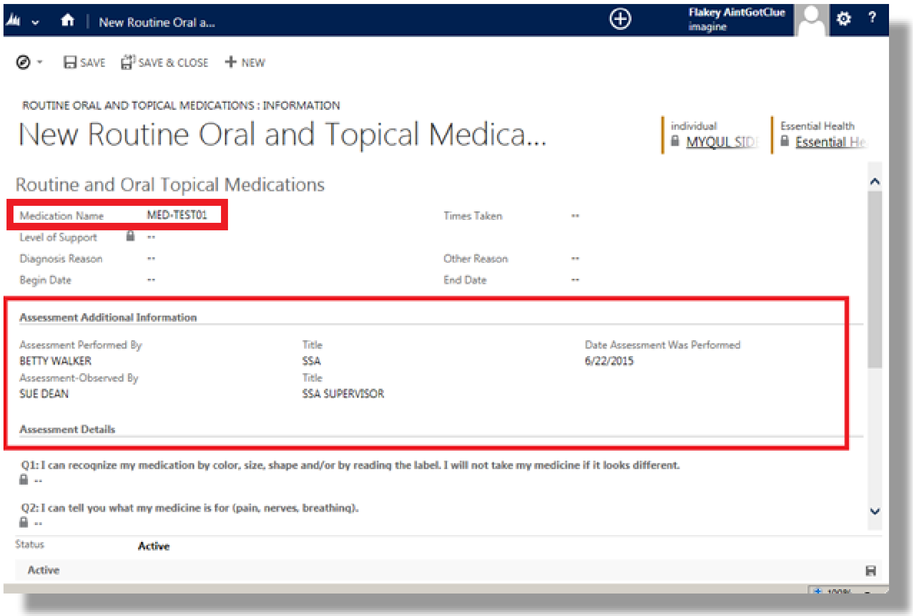


Figure 54- All Medications

8. Click 'Save'
9. Click 'New' and repeat steps 5-6 until all medications have entered and assessed

Update Essential Health/Diagnosis

1. From Individual's Front Page, click the dropdown next to the Individual's name and select the 'Essential Health' tile
2. Click the 'Essential Health' link From Essential Health Front Page, click on the section of the 'Essential Health' information to be updated

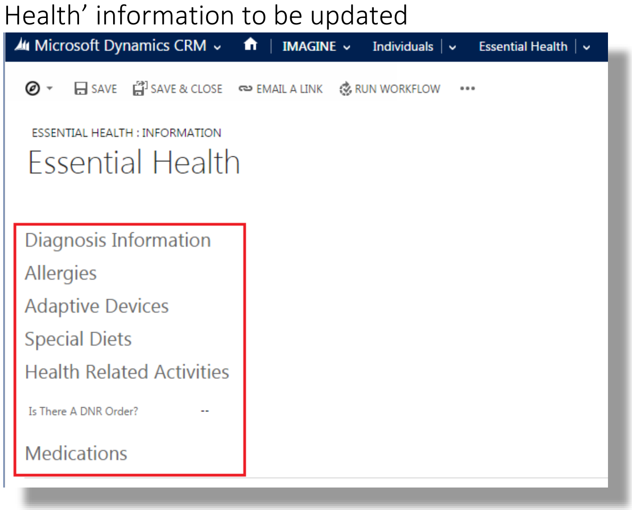


Figure 55- Update Essential Health

3. Click through links to access data to change
4. Update information
5. Click 'Save & Close'

Pictures

Upload Photos

1. From Individual's Front Page, click on the 'Pictures' section
2. Click in the box below 'Notes'; the box will expand to attach a file

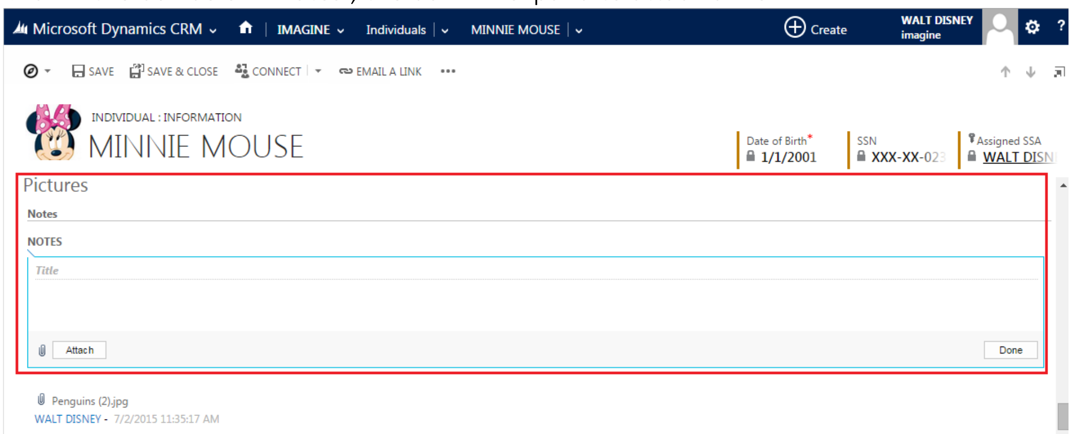


Figure 56- Attach File

3. Click 'Attach'
4. Click 'Choose File'
5. Browse to the desired file and select
6. Click 'Open'

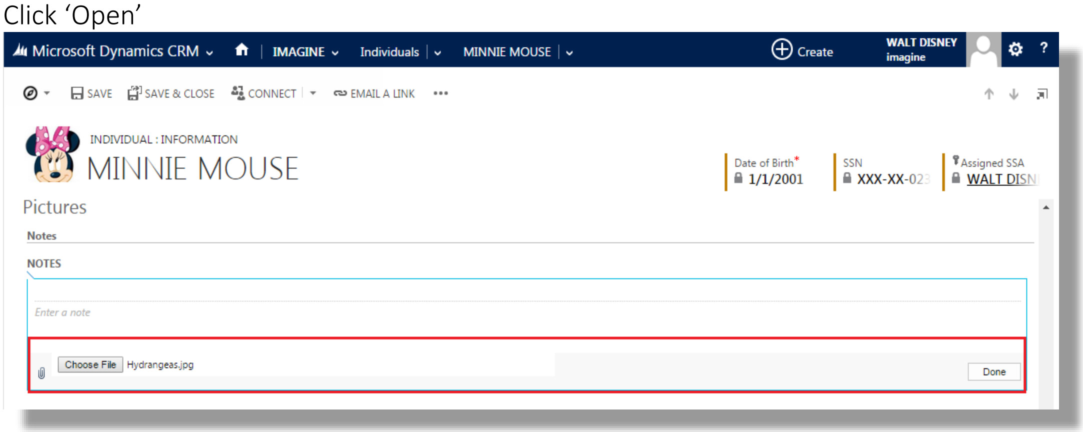


Figure 57- Open File

7. Click 'Done'; file is now attached

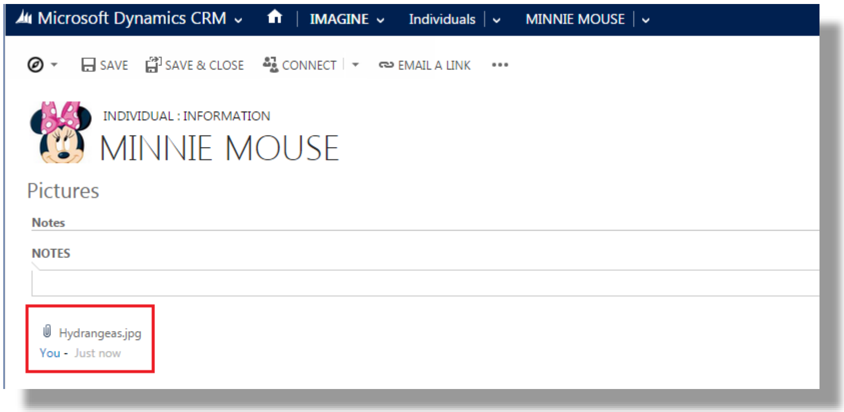
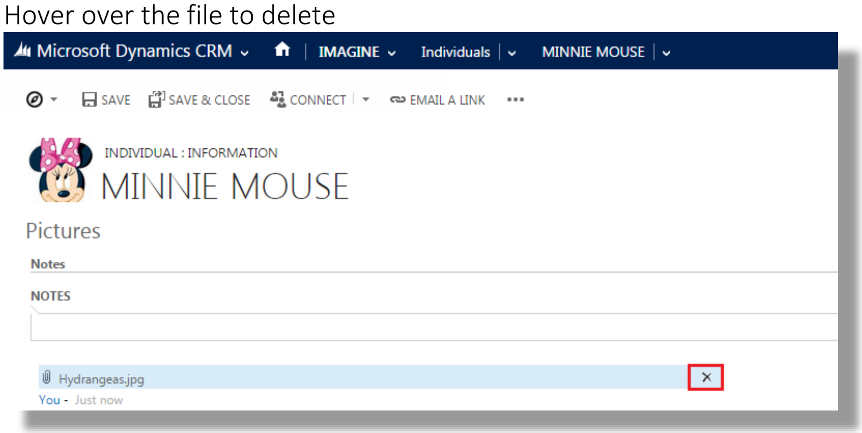


Figure 58- Photo Attached

Remove a Photo

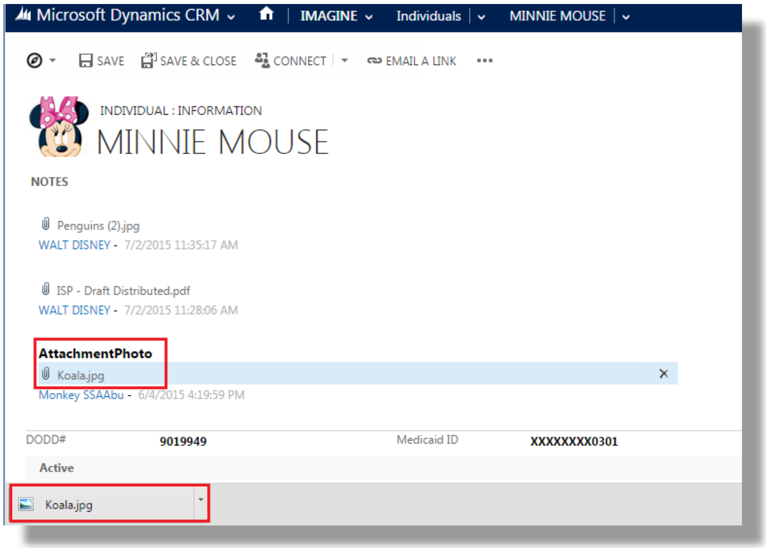
1. From Individual’s Front Page, click on the ‘Pictures’ section
2. Hover over the file to delete



3. Click the ‘X’ to the right of the file
4. Click ‘Done’

Open a Picture

1. From Individual’s Front Page, click on the ‘Pictures’ section
2. Click on the Photo hyperlink; the photo will download to the desktop



3. Click on the downloaded file to open

Choose a Profile Picture

The Individual's profile picture must be in the 'Pictures' section to select it as a profile picture

1. From Individual's Front Page, click on the 'More About Me' section
2. Scroll to the right/left to select photo

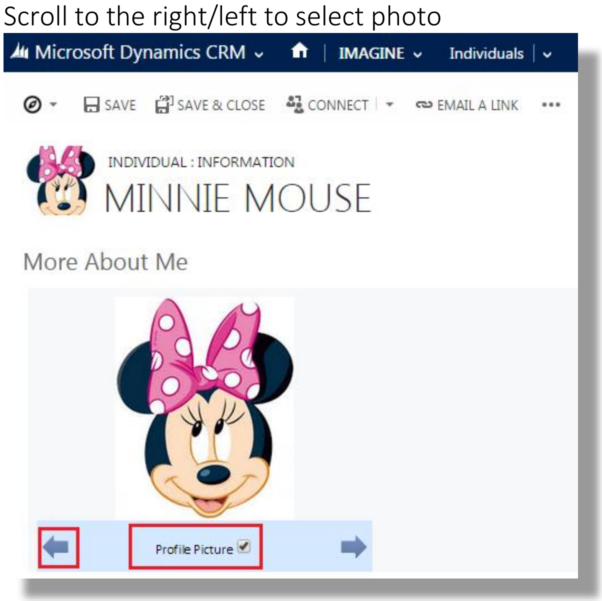


Figure 59- Profile Photo

3. Hover over the blue box under the Photo
4. Click the 'Profile Picture' checkbox

Documents

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'Documents' tile; this opens SharePoint
2. Click the '+New Document or Drag Files here'

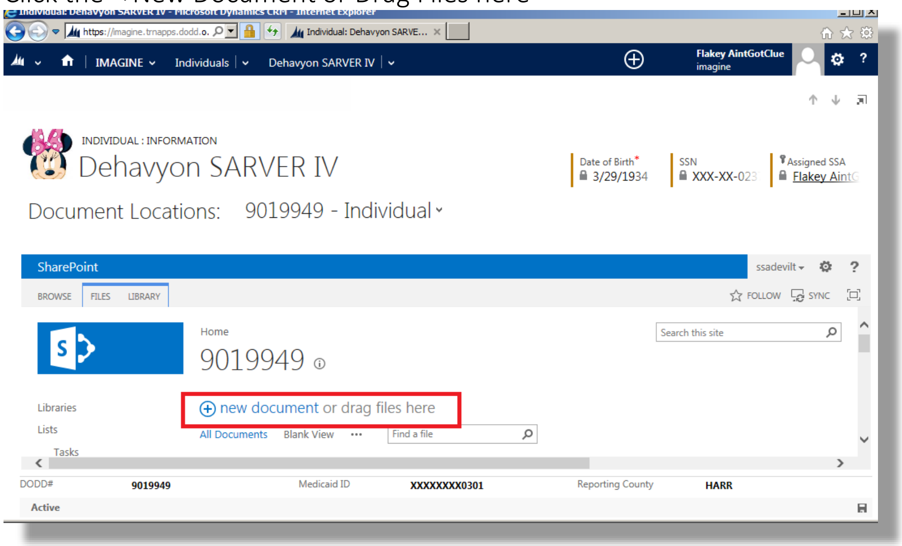


Figure 60- New Document

3. Browse for the file

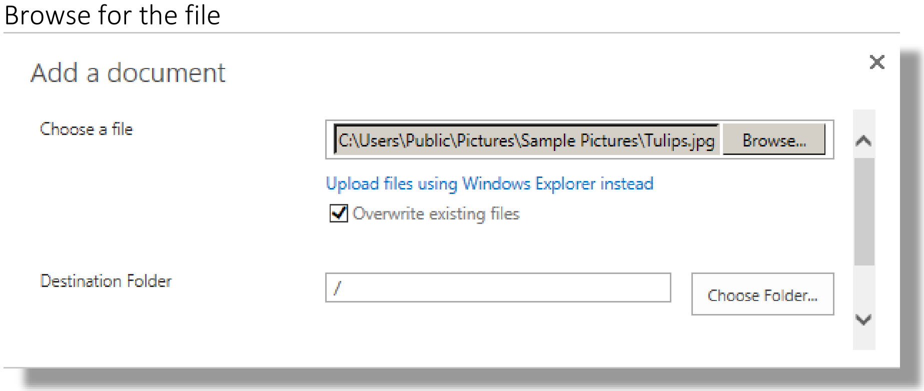


Figure 61- Browse File

4. Click 'Ok'
5. Confirmation box will display – Upload Successful

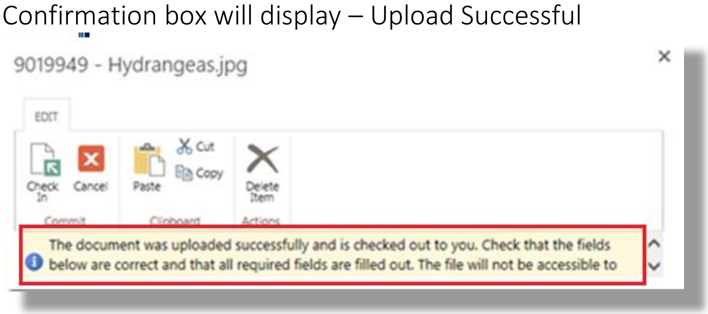


Figure 62- Upload Successful

6. File is uploaded to SharePoint but needs to be checked in. Scroll to the text at the bottom of the box and enter the required data (*Name, Title, SSA Confidential, *Section, *Category, PIN document).

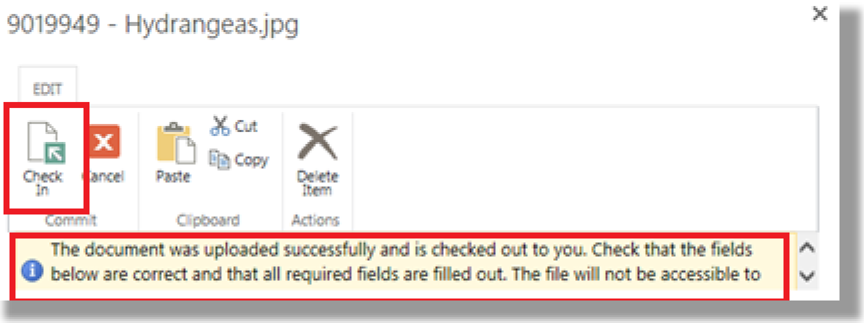


Figure 63- Document Check In

7. Click ‘Check In’; Document will now display in SharePoint library

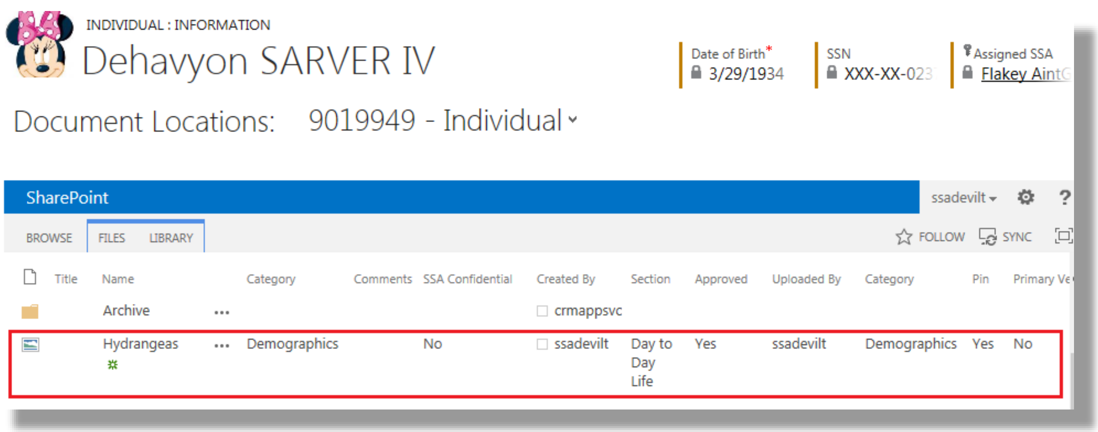
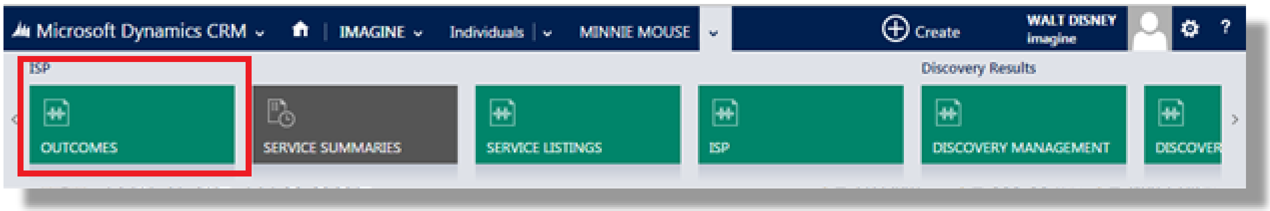


Figure 64- Document SharePoint

Outcome

Add New Outcome

1. From Individual Front Page click on the dropdown next to the Individual name and select the 'Outcome' tile



2. Click '+Add New Outcome' button. A pop up window will display

Figure 65- New Outcome

3. Enter Outcome information

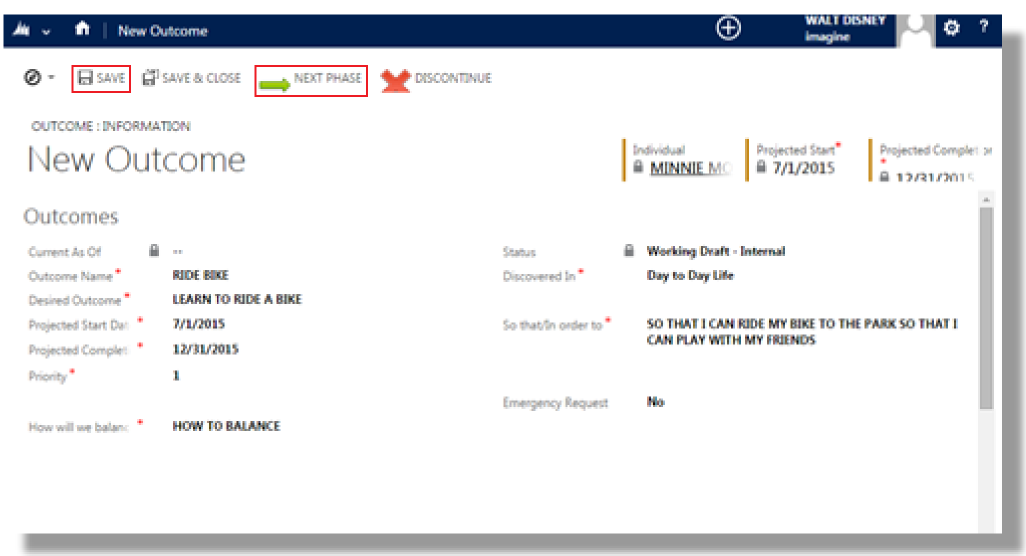
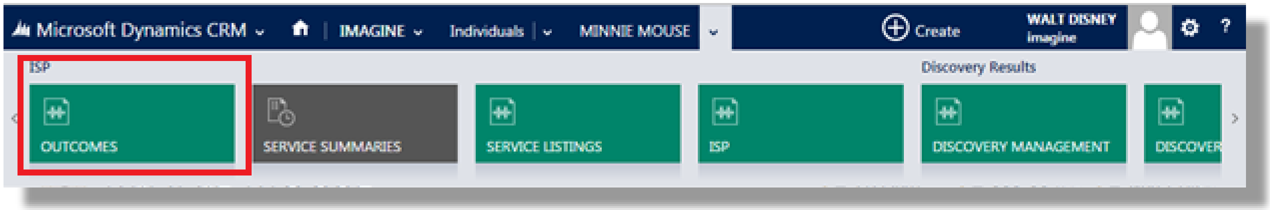


Figure 66- Outcome Details

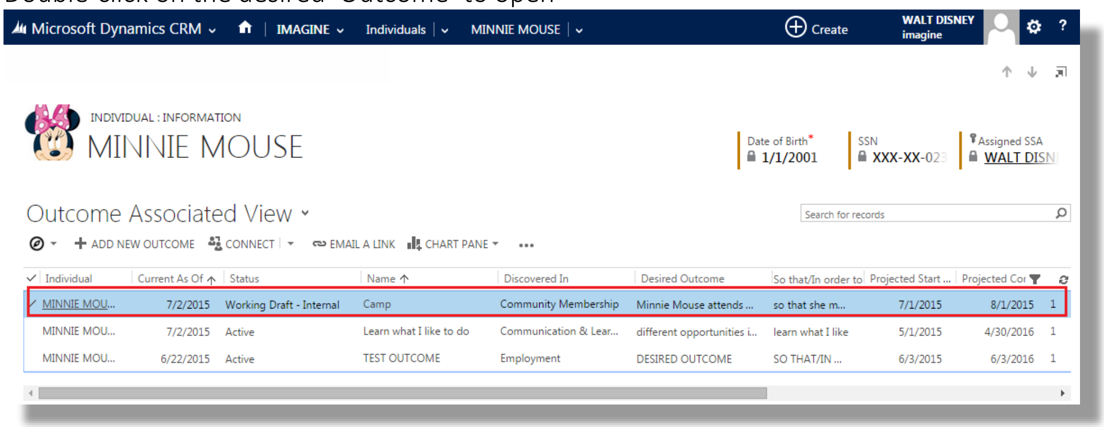
4. Click 'Save' – Phase 1
5. Click the 'Next Phase' button.

Changing Outcome Status - Outcome Phases

1. From Individual Front Page click on the dropdown next to the Individual name and select the 'Outcome' tile



2. Double-click on the desired 'Outcome' to open



3. Click on the More Commands (...) and select Next Phase ; this will move the Outcome to the next Phase in the process

Phase 1 – Working Draft- Internal

SSA enters the information. Portal users cannot see it.

Phase 2 – Working Draft- Review Required

It only goes to this phase if you Supervisor has a review setting to review your outcomes
Supervisor can send the notification back to the SSA so they know the outcome has been reviewed

Phase 3 – Draft Distributed

Draft Outcomes can now be seen by the portal users. The portal users will provide feedback.
If there are assigned team members that do not use the ***imagineIS***, the SSA will need to send the Outcomes to them and gather feedback manually
You can print from <u>within the outcome section</u> in this phase

Phase 4 – Active

The outcome is now active
Outcomes must be in this phase to print <u>on the ISP</u>

Phase 5 – Complete

If the outcome has been met, then the outcome should be marked complete.

Phase 6 – Discontinued

If an outcome was entered and then the team determined a new path should be taken, then the outcome should be marked discontinued.
After an outcome is marked discontinued, the team will not be able to see it.

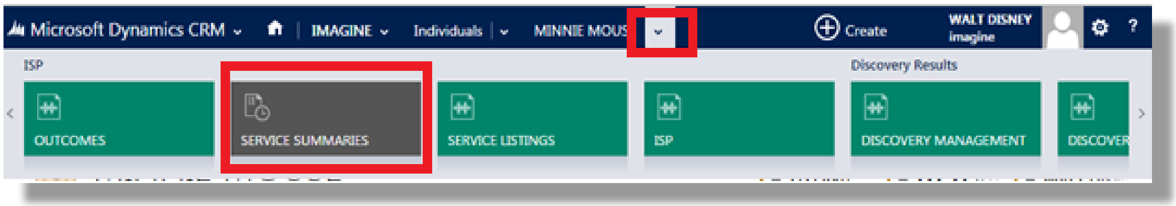
Services

Services are a set of consumable benefits delivered by an accountable licensed provider. Services allow the Individual to achieve a specific Outcome.

Service Summary

Service Summaries are automatically generated by the system. For each Individual there will be a current and future state Service Summary.

1. From Individual's Front Page, click on dropdown next to Individual's name and select the 'Service Summaries' tile



2. Click on the Current Service Summary to open

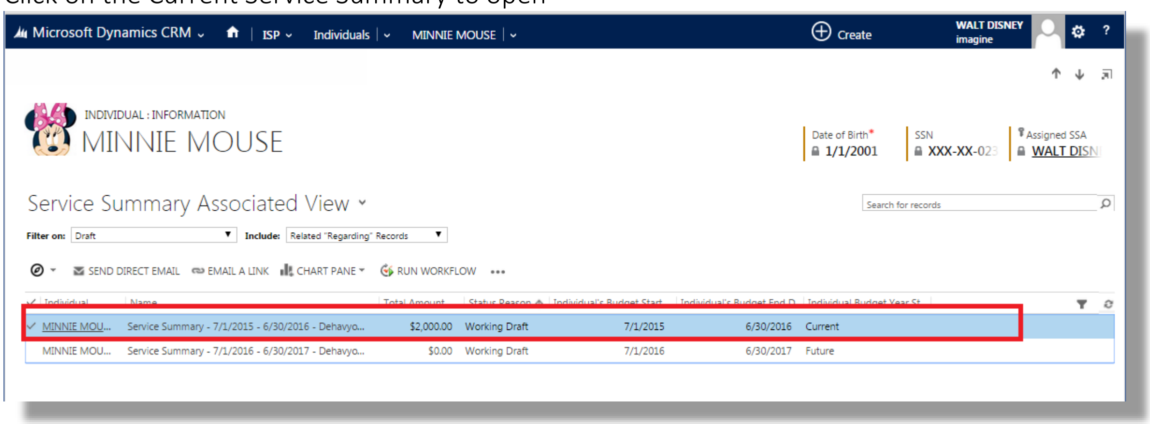
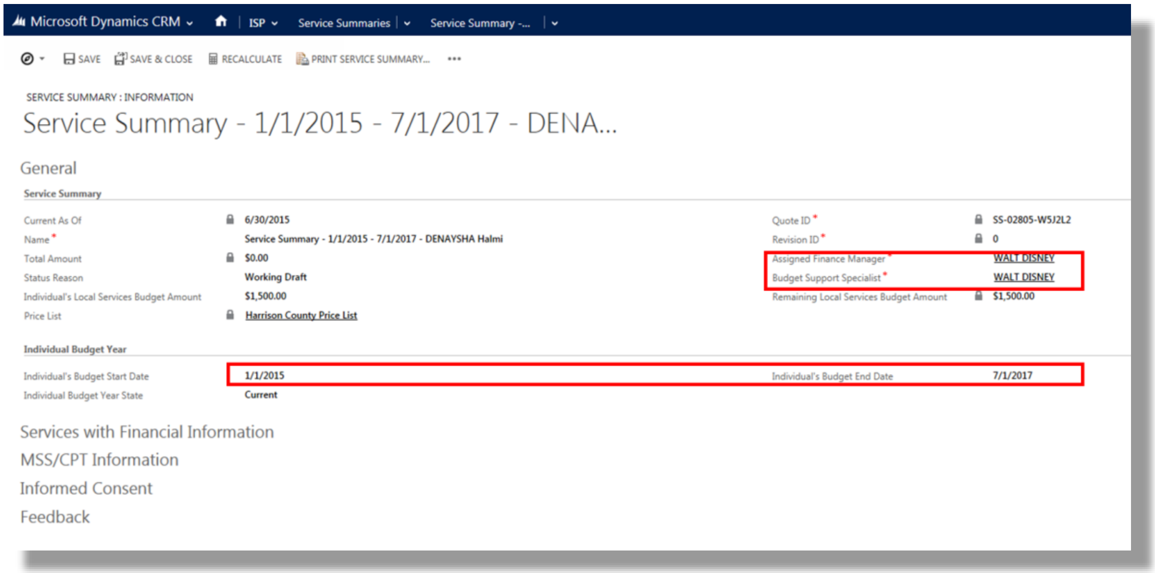


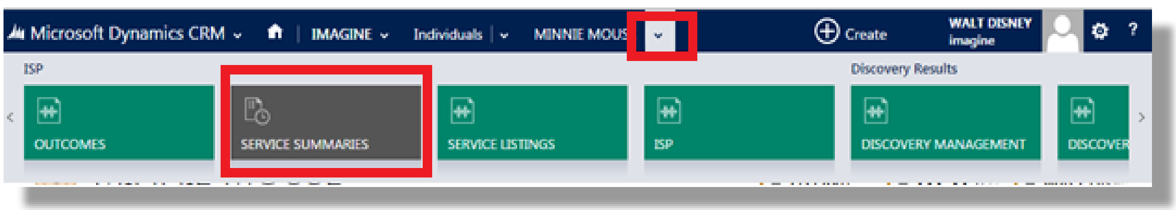
Figure 67- Current Service Summary

3. Service Summary Front Page displays service listings, and budgetary information. The start and end dates will be prepopulated with the waiver span dates for individuals on waivers. If the individual is not on waivers, then the SSA will need to populate the date span when assigning the Finance Manager and Budget Support Specialist.



Assign a Financial Manager

1. From Individual's Front Page, click on dropdown next to Individual's name and select the 'Service Summaries' tile



2. Click on the Current Service Summary to open
3. Click the search icon in the 'Finance Manager' field; search pop up will appear. If the Finance Manager does not appear in the list, click 'Look Up More Records'. If FM still does not appear in the list, the SSA Supervisor needs to go to the FM's user screen and check the box confirming that they have the FM title.

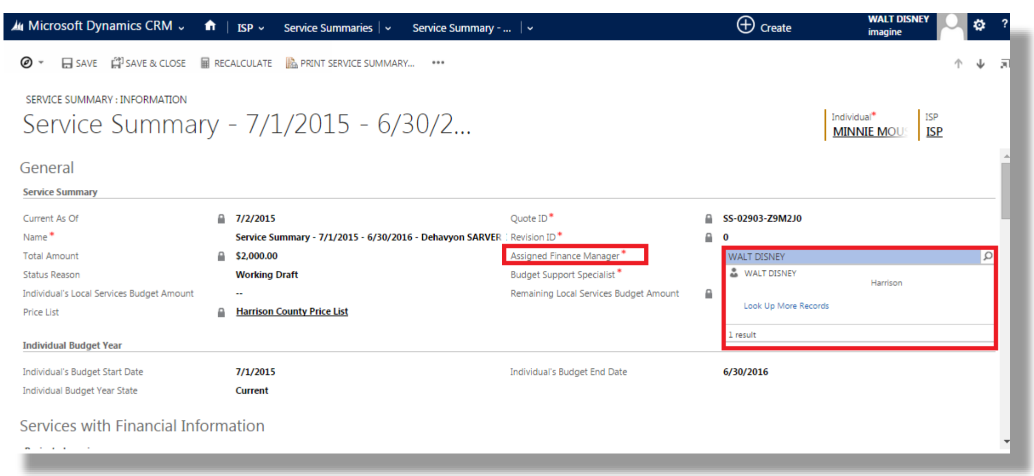


Figure 68- Assign Finance Manager

4. Search for Finance Manager

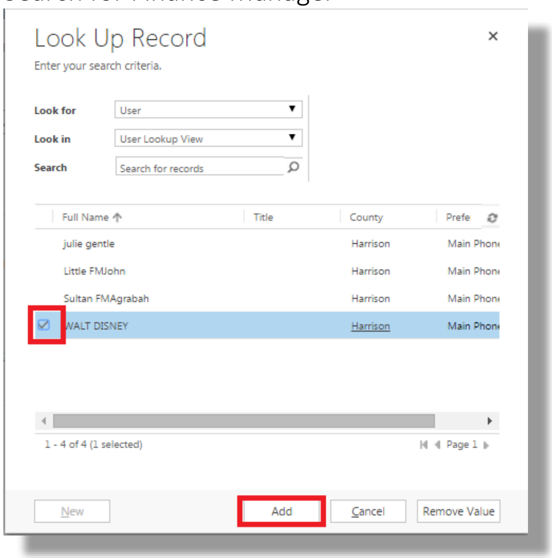


Figure 69- Finance Manger Lookup

5. Click on the check to the left of the Finance Manager name
6. Click 'Add'
7. Click 'Save & Close'

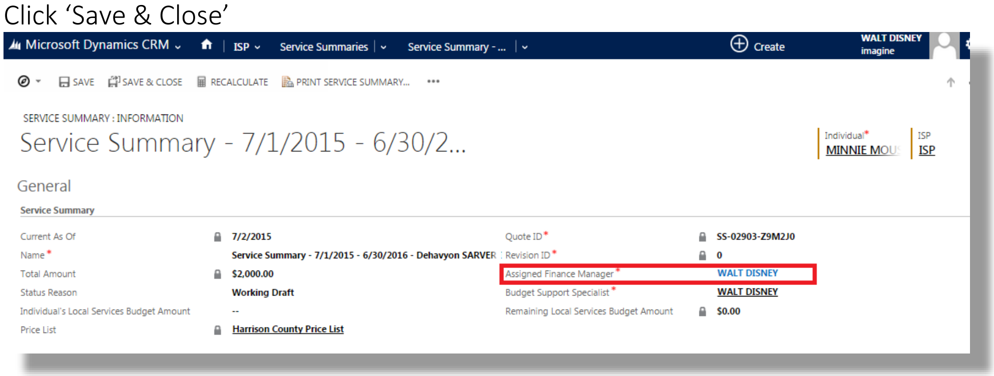
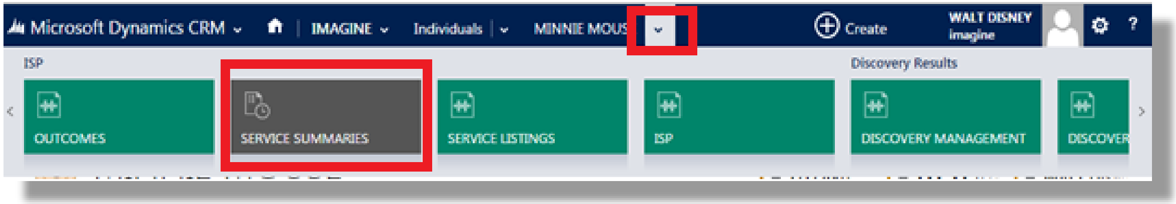


Figure 70-Assign Financial Manager Complete

Assign a Budget Support Specialist

1. From Individual's Front Page, click on dropdown next to Individual's name and select the 'Service Summaries' tile



2. Click on the Current Service Summary
8. Click the search icon in the 'Budget Support Specialist' field; search pop up will appear. If the Budget Support Specialist does not appear in the list, click 'Look Up More Records'. If they still do not appear in the list, the SSA Supervisor needs to go to the BSS's user screen and check the box confirming that they have the BSS title.
3.

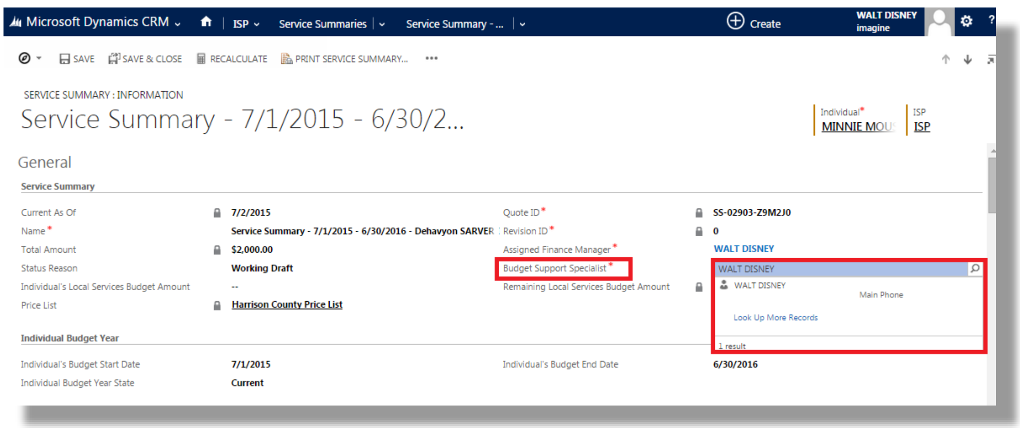


Figure 71 -Add Budget Support Specialist

4. Search for Budget Support Specialist

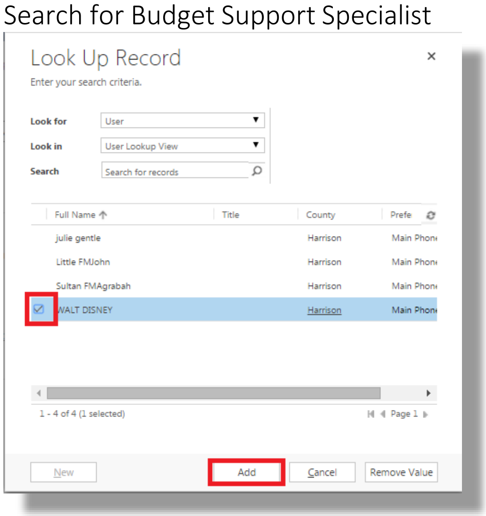


Figure 72 - Select Budget Support Specialist

5. Click on the check to the left of the Budget Support Specialist name
6. Click 'Add'
7. Click 'Save & Close'

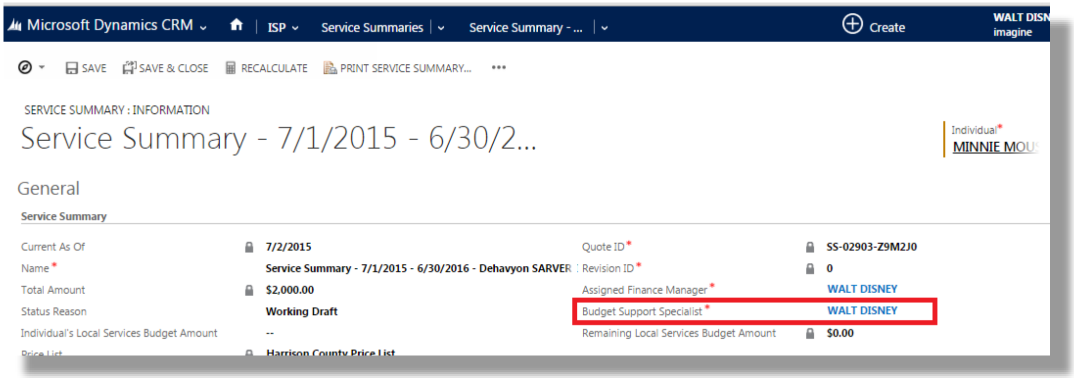


Figure 73- Assign Budget Support Specialist

Budget Start/End Dates

1. From Individual's Front Page, click on dropdown next to Individual's name and select the 'Service Summaries' tile

2. Click on the Current Service Summary
3. Click in the Budget Start Date field and enter data
4. Click in the Budget End Date field and enter data
5. Click 'Save & Close'

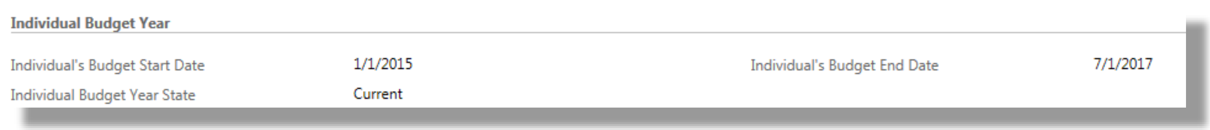


Figure 74- Budget Start/End Dates

Service Summary Phases

Phase 1 – Working Draft

The SSA is entering information. Portal users can't see it yet.
You must at a minimum: 1) Assign a budget support specialist, 2) assign a finance manager, 3) enter a start date, 4) enter an end date.

Phase 2 – Pending Approval

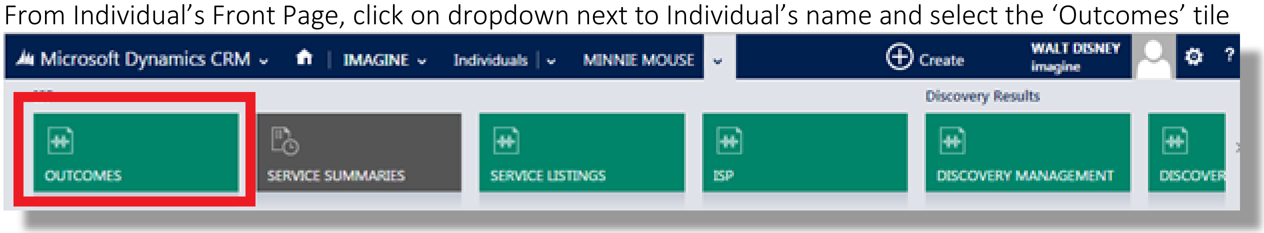
Draft Service Summary / Budget can now be seen by the portal users. The portal users will provide feedback.
If there are assigned team members that do not use ***imagineIS***, the SSA will need to send the Service Summary / Budget to them and gather feedback manually
Finance Manager enters the total waiver dollars, changes approvals needed to ‘no’ and clicks save.
You can print from this phase.

Phase 3 – Complete

The Service Summary / Budget is now active
Service Summary comes must be in this phase to print on the ISP

Service Listing

1. From Individual’s Front Page, click on dropdown next to Individual’s name and select the ‘Outcomes’ tile



2. Double-click the link for the Outcome to add services

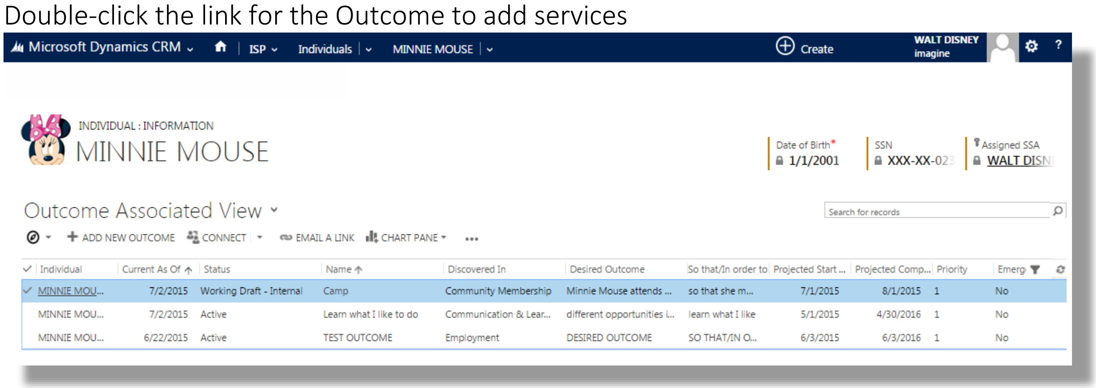


Figure 75-Outcome

3. Scroll down to ‘Projected Services’

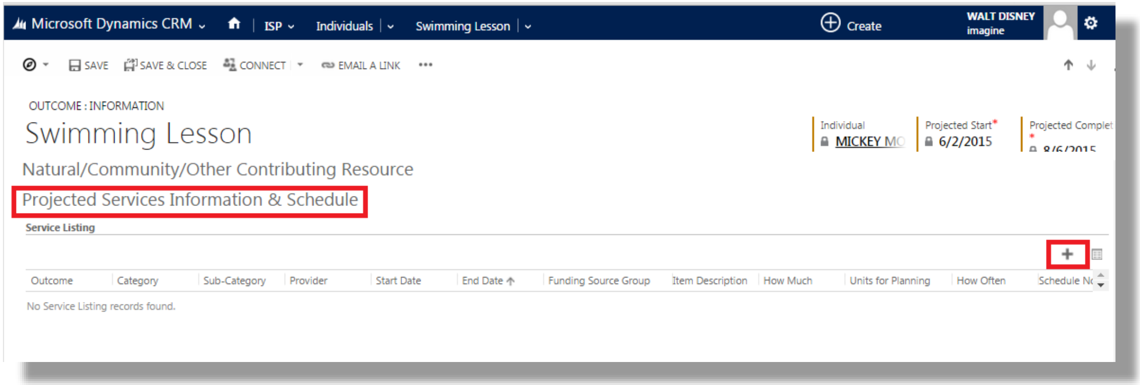


Figure 76- Projected Services

4. Click '+' to add new services

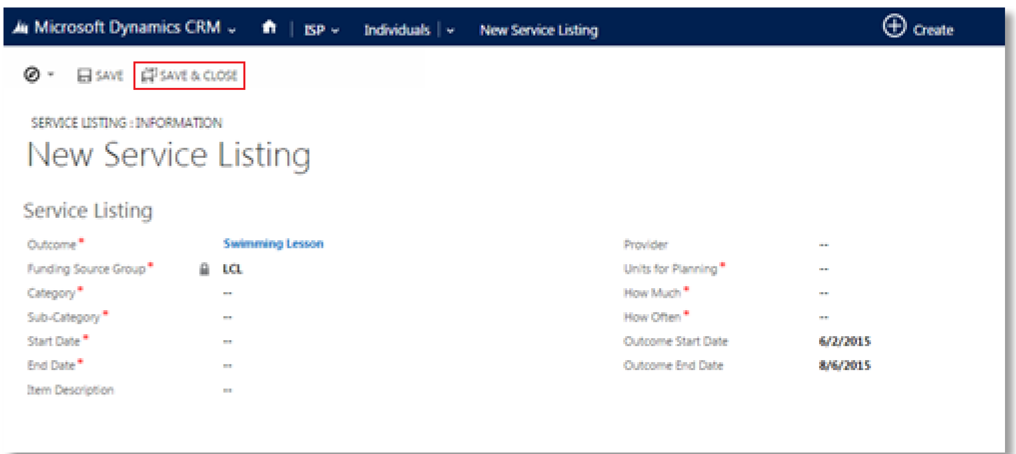
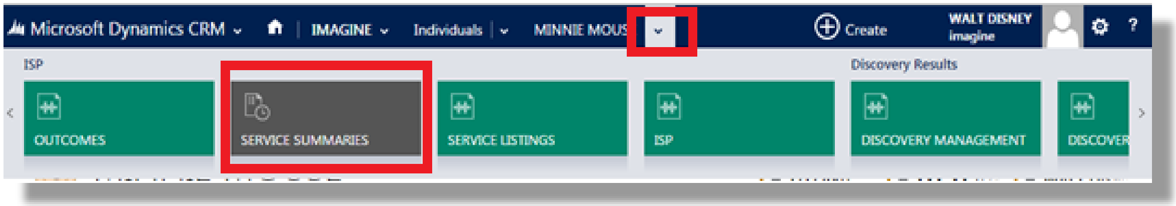


Figure 77- New Service Listing

5. Enter all required information; Category and Sub-Category must be selected before selecting a Provider in order to filter the Provider list for only those providers that match the Category/Sub-category criteria
6. Select Provider from Provider search box
7. Click 'Save & Close'

Cost Projection Manual Notification

1. From Individual's Front Page, click on dropdown next to Individual's name and select the 'Service Summaries' tile



2. Click on the Current Service Summary
3. From the Service Summary Front Page, click on the More Commands (…)
4. Click on 'Run Workflow'

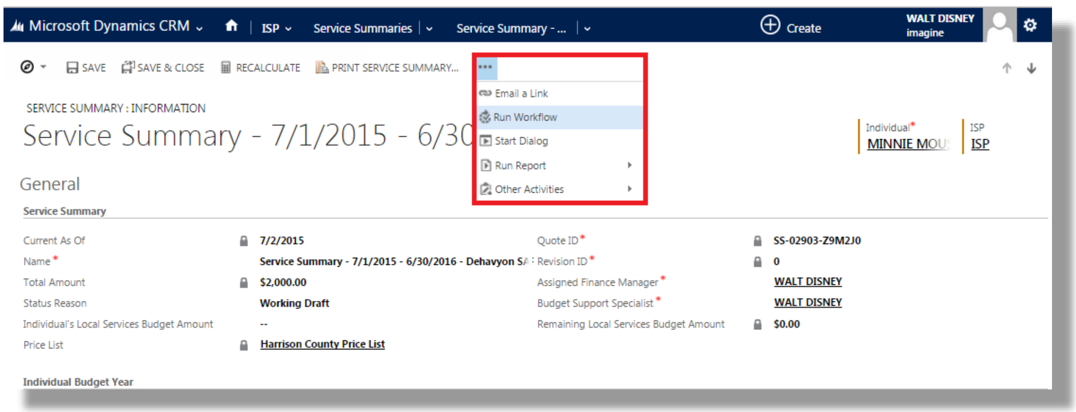


Figure 78 - Run Workflow; Service Summary

5. Select the ‘Notification-Cost Projection Needed’ workflow by clicking the box to the left of the workflow name

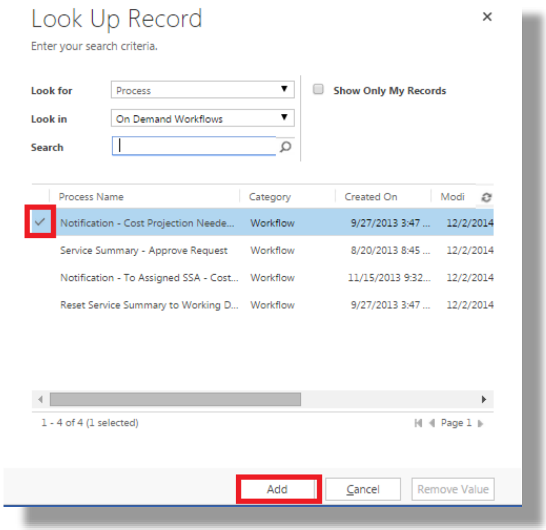


Figure 79- Workflow

6. Click ‘Add’
7. Confirmation window will appear

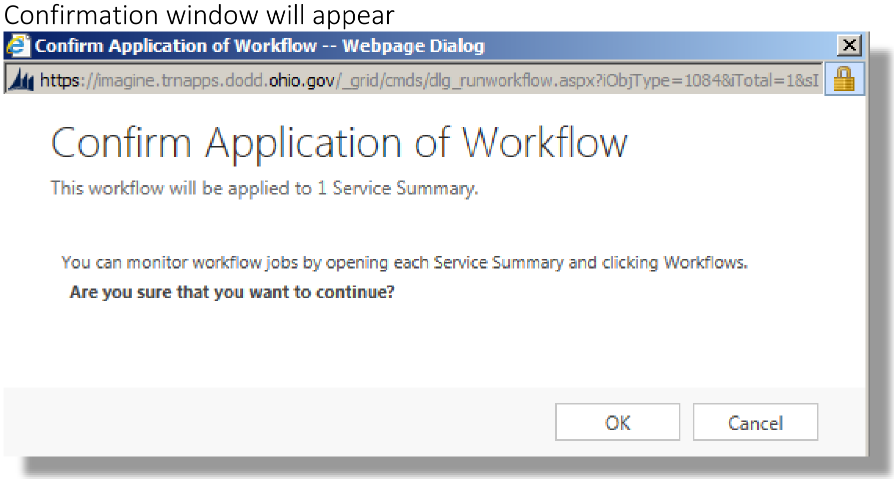


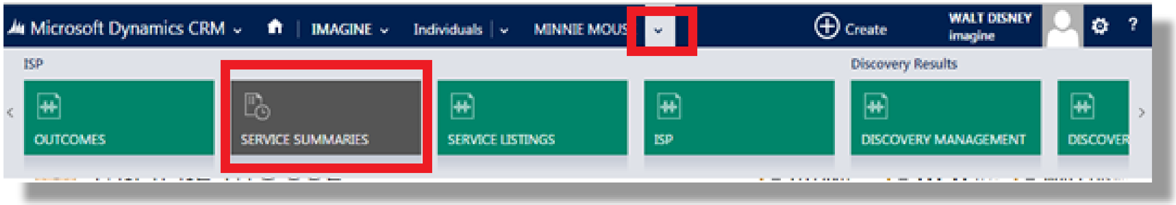
Figure 80- Workflow Confirmation

8. Click ‘Ok’; Team Member (BSS/FM) will receive notification that Services need to be approved.

Revise Service Summary

If Service Summary needs to be revised, the SSA will receive a notification from the Finance Manager or Budget Support Specialist. The Service Summary will be in ‘Working Draft’ phase. The SSA must then go into the Service Listings to revise the service listing.

1. From Individual's Front Page, click on dropdown next to Individual's name and select the 'Service Summaries' tile



2. Click on the Service Summary to be updated
3. Make changes to Service Summary
4. Click 'Save & Close'

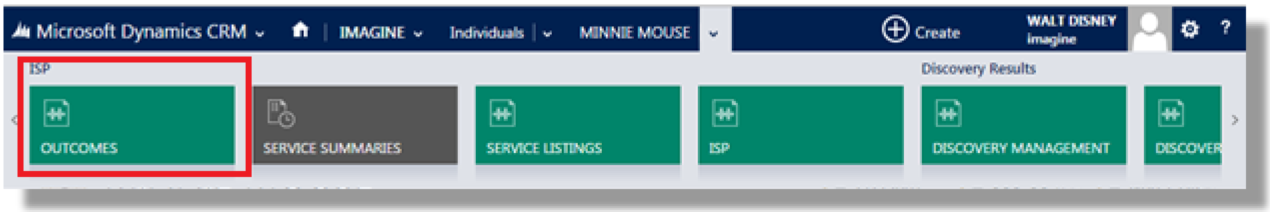
Deny Service Summary

If Service Summary is 'Denied' by the BSS/FM, all Service Listings are removed and the Service Summary is reset to Working Draft. The SSA receives an Alert and must start over with the Service Listings.

BSC/HRC Approval

When there are Support Considerations tied to an Outcome, the ISP may need to be reviewed and approved by a Behavior Support/Human Rights committee

1. From Individual Front Page click on the dropdown next to the Individual name and select the 'Outcome' tile



2. Click on the Outcome to open it
3. Scroll down to 'Support Considerations' and click the link
4. Click in the 'Committee Review Type' field

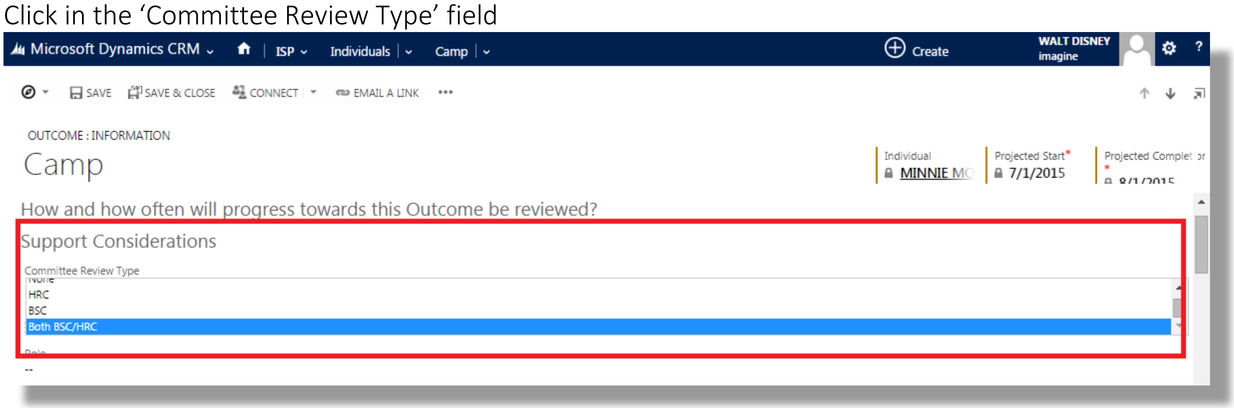


Figure 81- Committee Review

5. Select the Review Type and enter additional support considerations

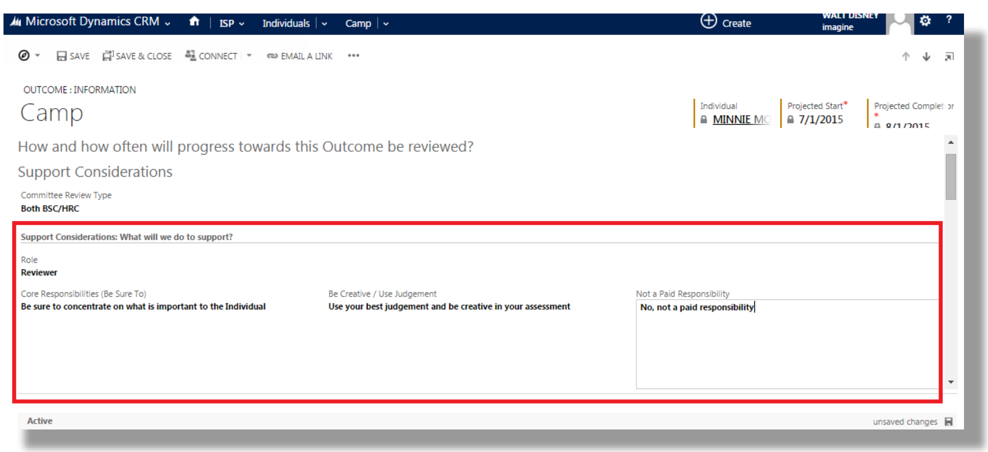
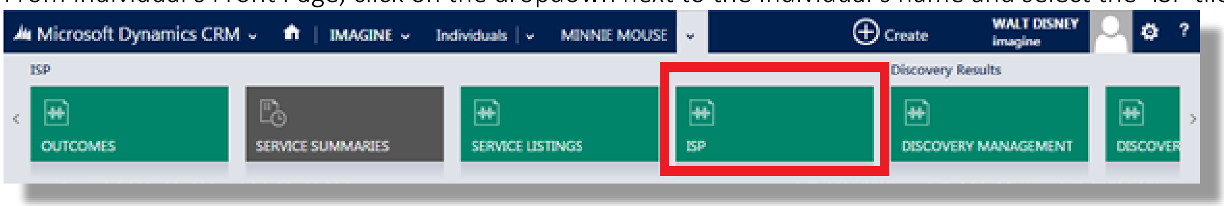


Figure 82- Review Type

6. Click 'Save & Close'; this takes you back to the Outcome Front Page
7. Click the Individual's name to take you to the Individual's Front Page

demograFigure 83- Back to Individual Front Page

8. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'ISP tile



9. Double-click on the ISP to be reviewed

Figure 84 - Select ISP

10. Click in the HRC Committee Contact field and search for the HRC user; if the HRC user is not listed click on 'Look Up More Records'

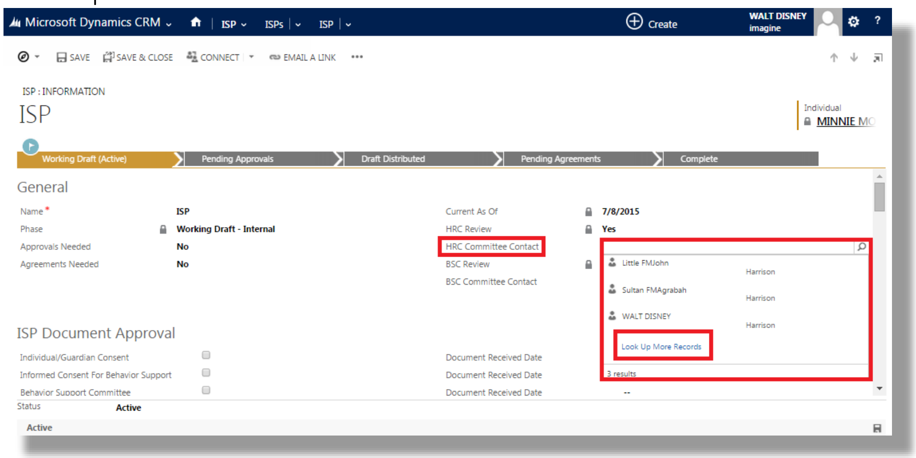


Figure 85 - Selecting Behavior Support/Human Right Committee

11. Select user from the list or if 'Look Up More Records' is used Click 'Add' on Look Up pop up screen
12. Click 'Ok'
13. Click in the BSC Committee Contact field and search for the BSC user; if the BSC user is not listed click on 'Look Up More Records'
14. Select user from the list or if 'Look Up More Records' is used Click 'Add' on Look Up pop up screen

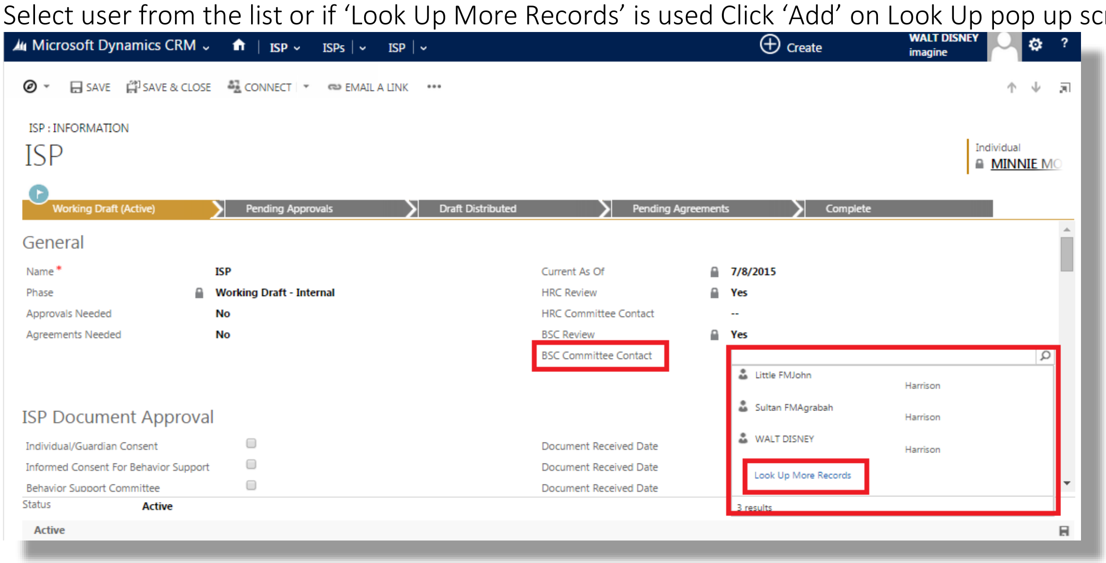


Figure 86 - Add BCS/HRC Contact

15. Click 'Add'
16. Click 'OK'
17. Click 'Save'
18. Click on the More Commands (…)
19. Click 'Next Phase' and await approvals

    Note: Prior to phasing the ISP, the Service Summary, Outcome, and Discovery Management must have been published.

Note: Requests are sent to HRC/BSC members for review of documents and approval

Feedback

Feedback is the reaction to a process or activity regarding the Individual or information that is useful to achieve the Individual's Outcome. There are four types of Feedback – Discovery, Outcome, Service Summary, and ISP. Feedback may be from any 'Assigned Team Member'.

Viewing Feedback

1. From SSA Dashboard, Click on the down arrow next to the List View and select 'My Feedback Notes Dashboard'

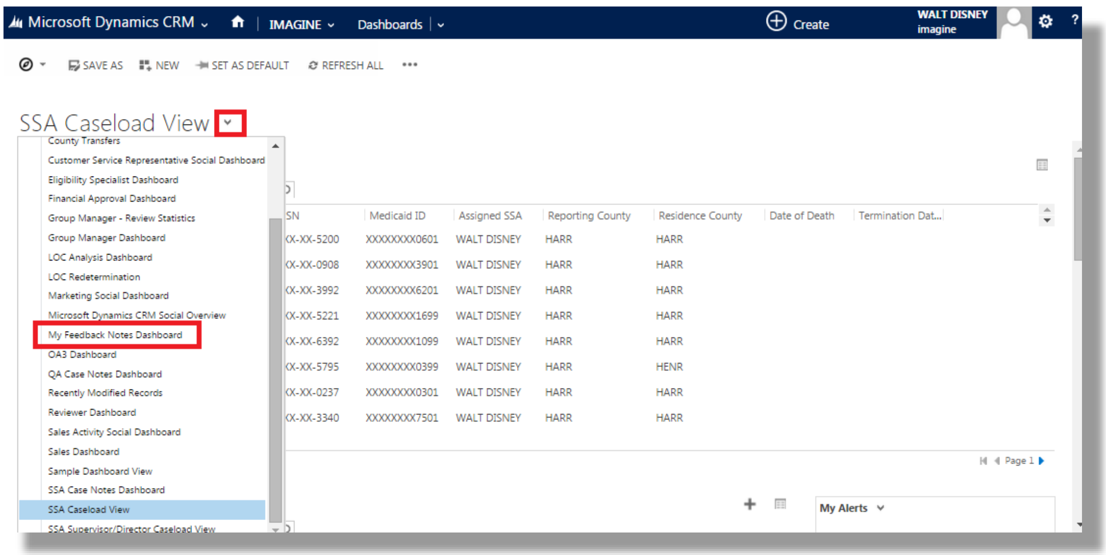


Figure 87- Viewing Feedback

2. Scroll down the page to the category of Feedback you wish to view.

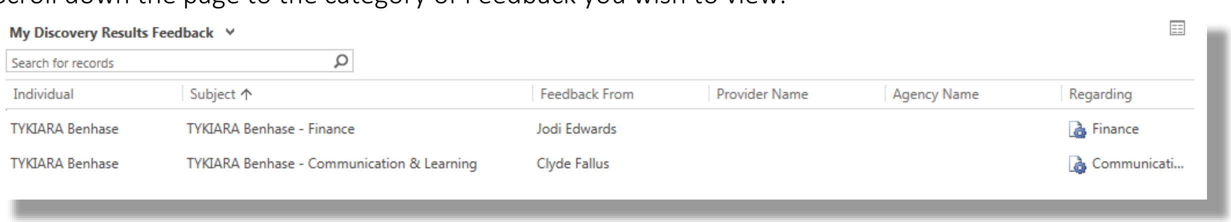


Figure 88- Discovery Feedback

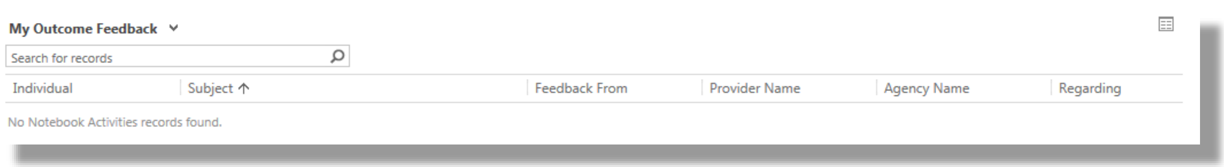


Figure 89- Outcome Feedback

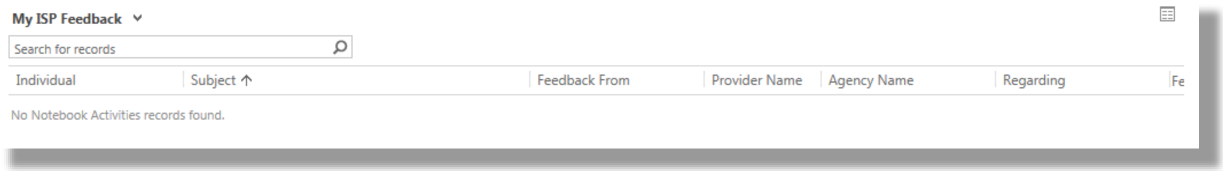


Figure 90- ISP Feedback

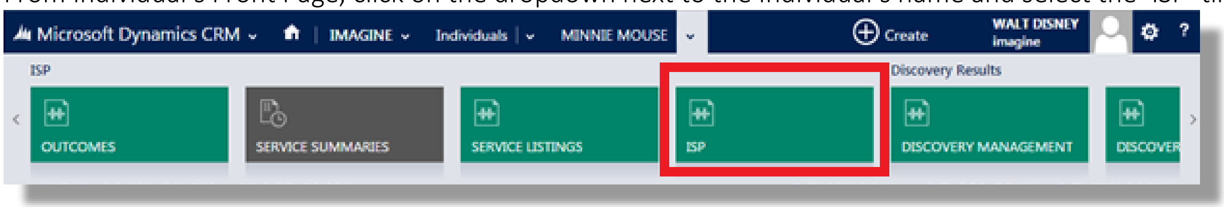
3. Click on the ''Subject' in the link to take you to the Feedback comments

Plan Approvals

A Plan must be in 'Working Draft-Pending Approval' phase.

Paper Copy: Some 'Connections' may not have access to the ***imagineIS*** portal. For these connections a paper copy of the ISP will be sent. Paper approvals must be manually entered in the ISP Approval section.

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'ISP' tile



2. Double-click on the ISP to be approved
3. Scroll to the 'ISP Document Approval' section

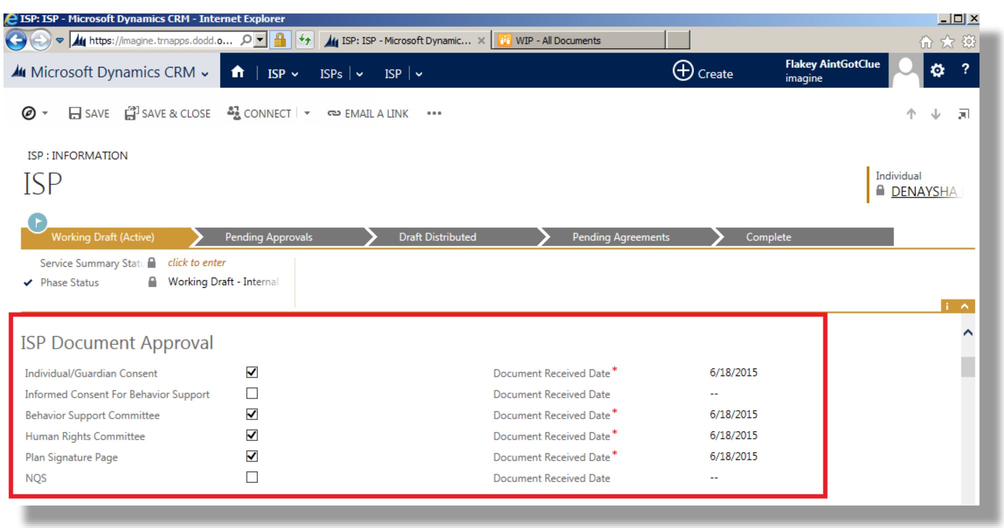
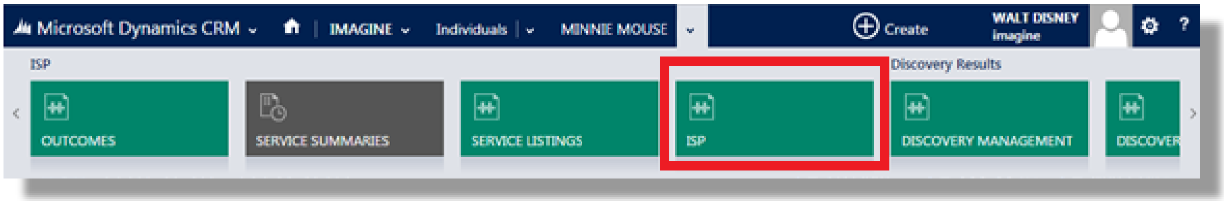


Figure 91- ISP Document Approval

4. Check the appropriate boxes and enter the date approval was received
5. Click 'Save & Close'

Electronic Approvals:

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'ISP' tile



2. Double-click on the ISP to be approved
3. Scroll to the 'Approval Tracking' section

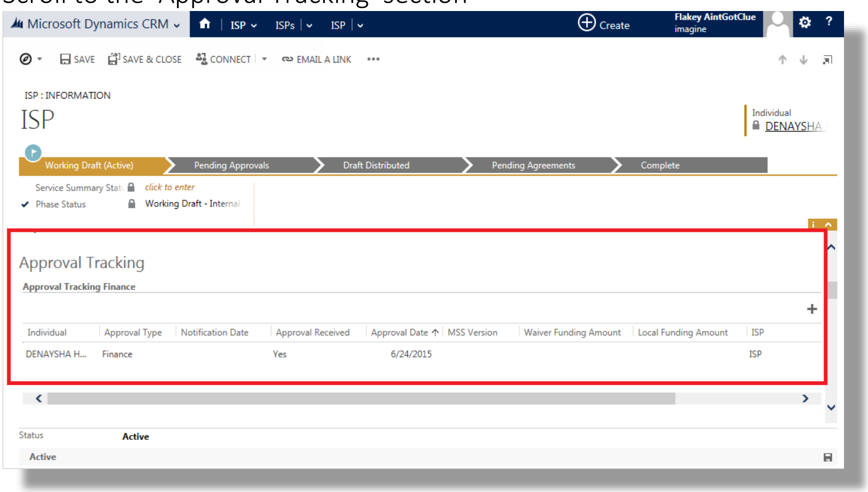
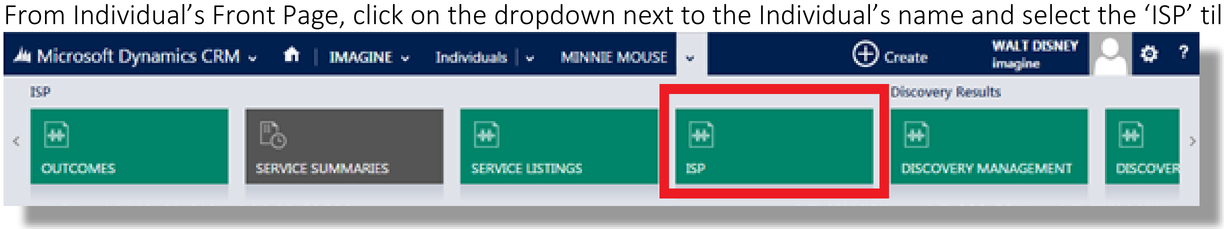


Figure 92- Approval Tracking

4. Approvals will be seen by sections – HRC, BSC, Finance and MSS/CPT

Plan Agreements

1. From Individual's Front Page, click on the dropdown next to the Individual's name and select the 'ISP' tile



2. Double-click on the ISP to be viewed
3. Scroll to the 'Agreement Tracking' section

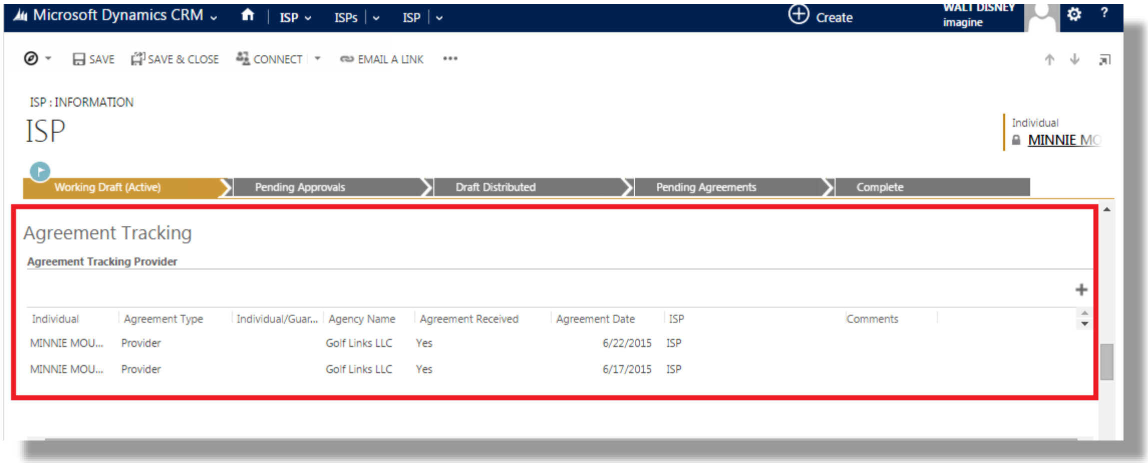


Figure 93- Agreement Tracking

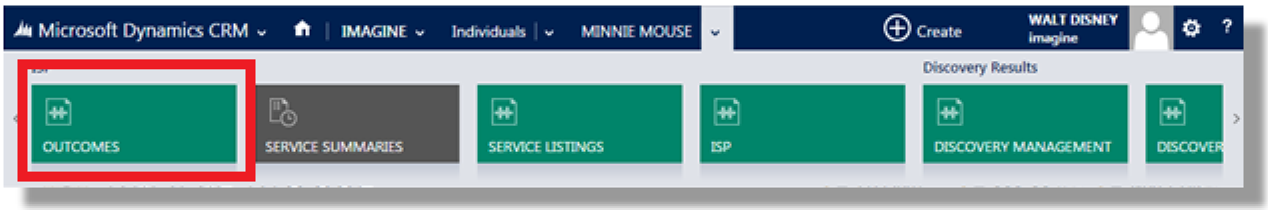
4. There are separate sections for Providers, Individual and Guardian. Agreements will be displayed with a Yes/No indicator in the 'Agreement Received' field.

Action Plan

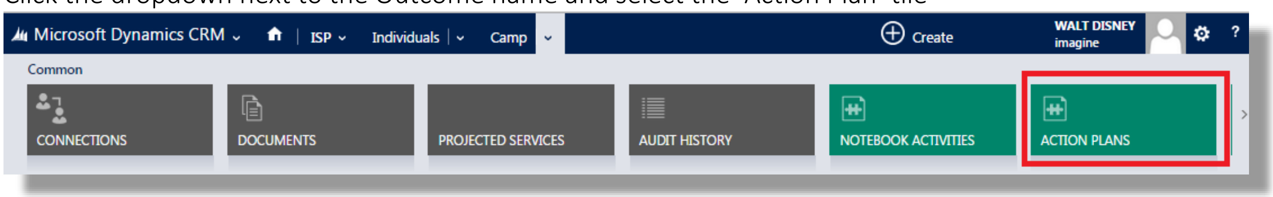
An Action Plan is a series of steps that must be taken to achieve a specific goal. The SSA will assign the plan to the providers and It is the responsibility of the Provider to create the specific steps to achieve the Individual's Outcome.

Create Action Plan

1. From the Individual Front Page, click the dropdown next to the Individual's Name
2. Select the 'Outcomes' tile



3. Double-click on the selected 'Outcome'
4. Click the dropdown next to the Outcome name and select the 'Action Plan' tile



5. Click '+Add New Action Plans', an action plan pop up will display

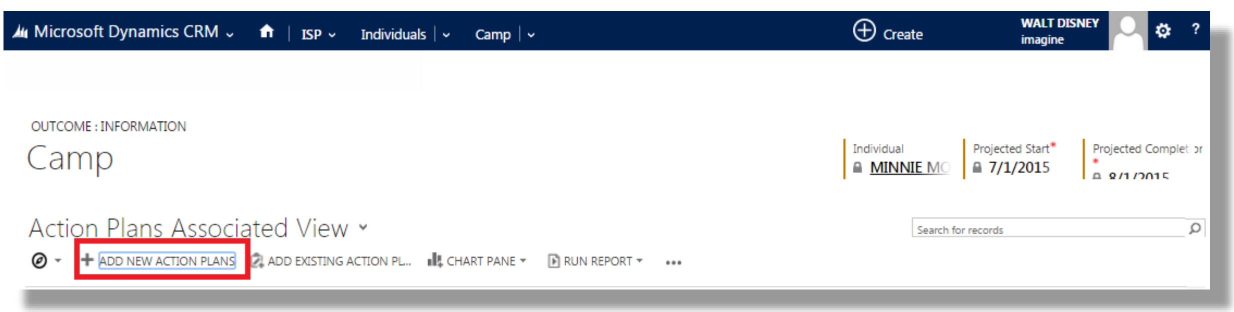


Figure 94- Add New Action Plan

6. Click in the 'Assign Provider' search box

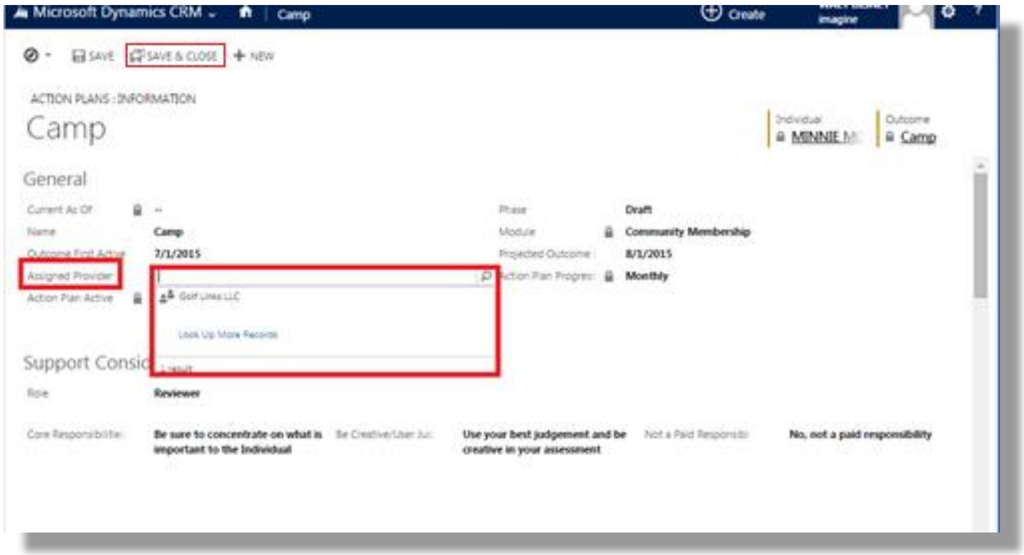


Figure 95- Assign Provider

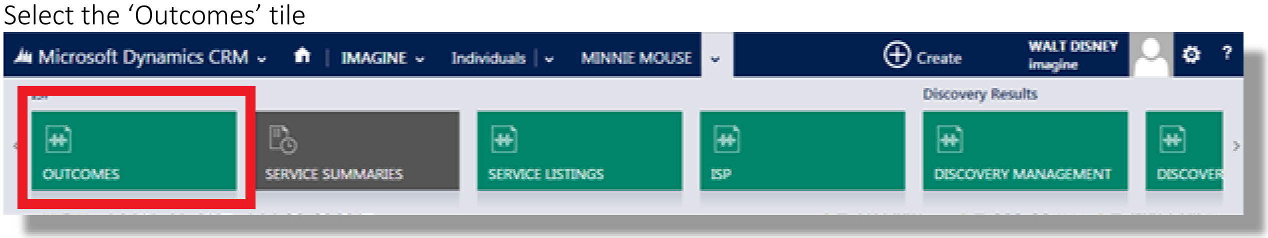
7. Select Provider from search list, if the Provider not listed click on 'Look Up More Records'
   Note: **The provider must have a service listing on the corresponding outcome to show in the list and have the ability to have the action plan assigned to them.**

8. If 'Look Up More Records' is used Click 'Add' on Look Up pop up screen
9. Click 'Save & Close'; The Provider will now see an Action Plan for the Individual on the Portal side and can now add Action Steps to the Action Plan.

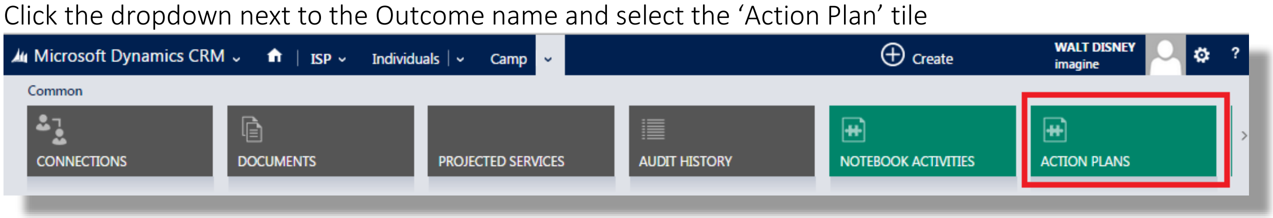
Create Action Steps

It is the responsibility of the provider to complete the action steps. However, the SSA can complete the action steps on behalf of the provider if the provider does not have portal access.

1. From the Individual Front Page, click the dropdown next to the Individual's Name
2. Select the 'Outcomes' tile



3. Double-click on the selected 'Outcome'
4. Click the dropdown next to the Outcome name and select the 'Action Plan' tile



5. Double Click the Action Plan to open
6. Click on the More Commands (…)
7. Click on 'Other Activities'
8. Click on 'Action Step'

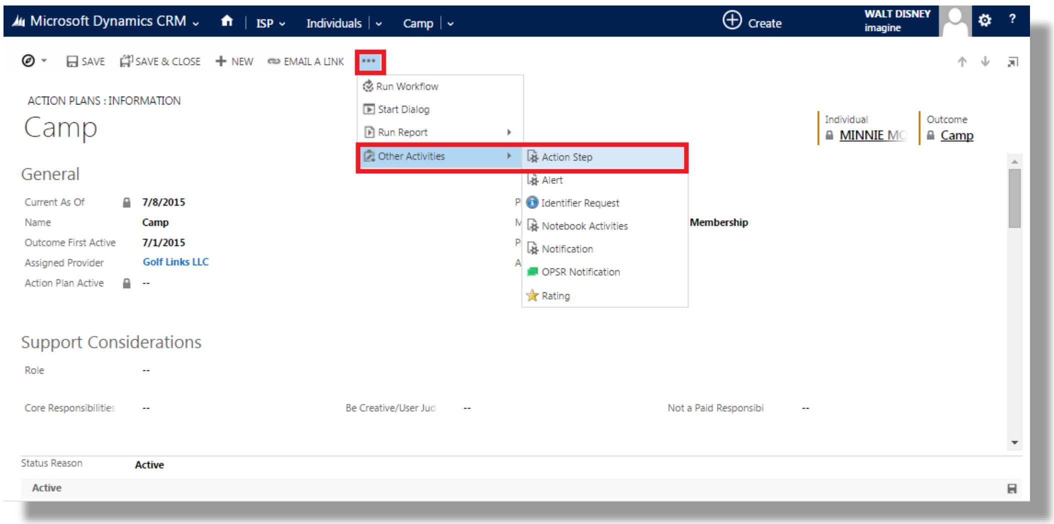


Figure 96- Action Step

9. New 'Action Step' screen will display; Enter Action Step information

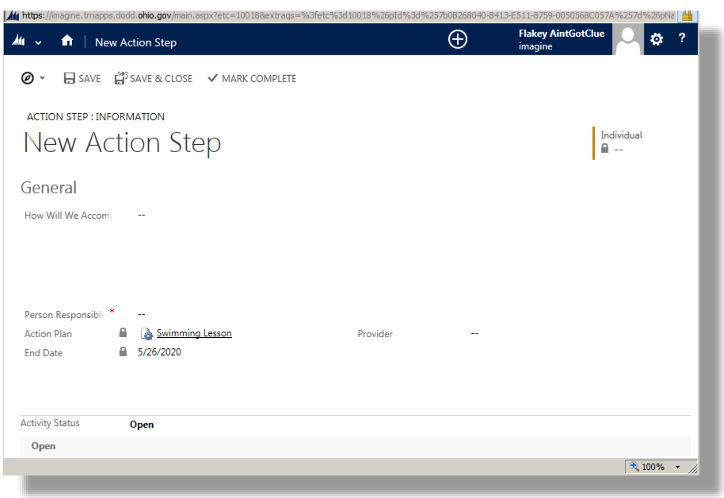
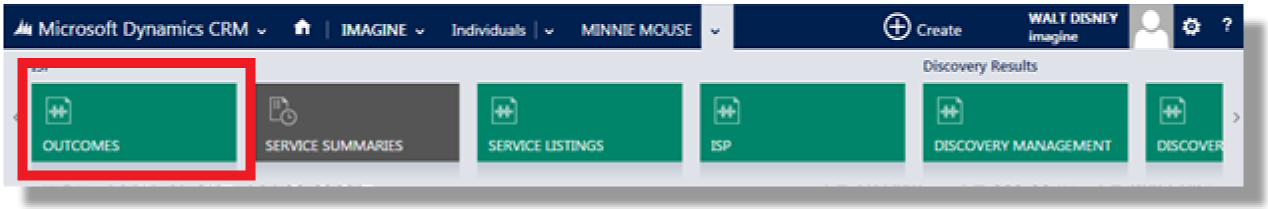


Figure 97- Action Step Details

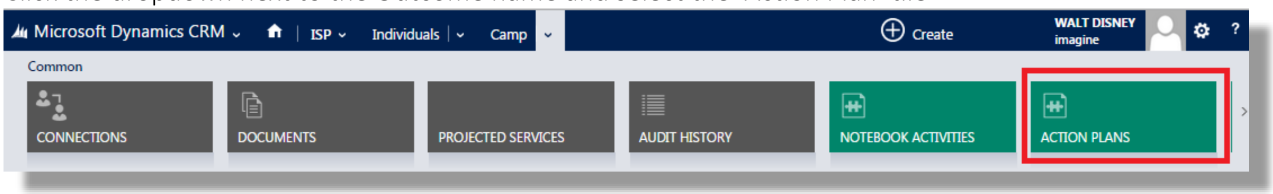
10. Click 'Save & Close'

Update Action Plan

1. From the Individual Front Page, click the dropdown next to the Individual's Name
2. Select the 'Outcomes' tile



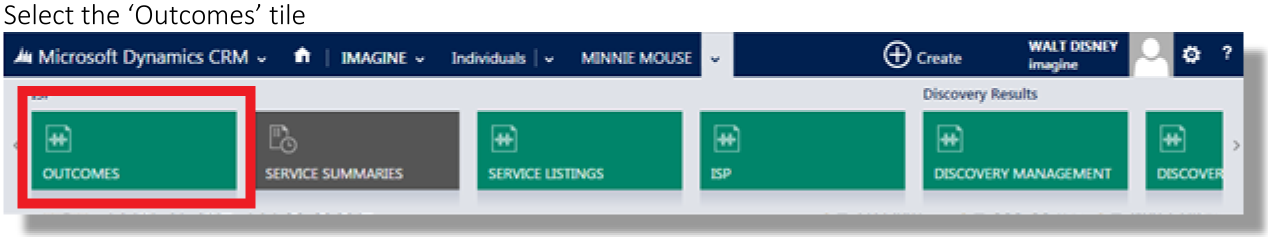
3. Double-click on the selected 'Outcome'
4. Click the dropdown next to the Outcome name and select the 'Action Plan' tile



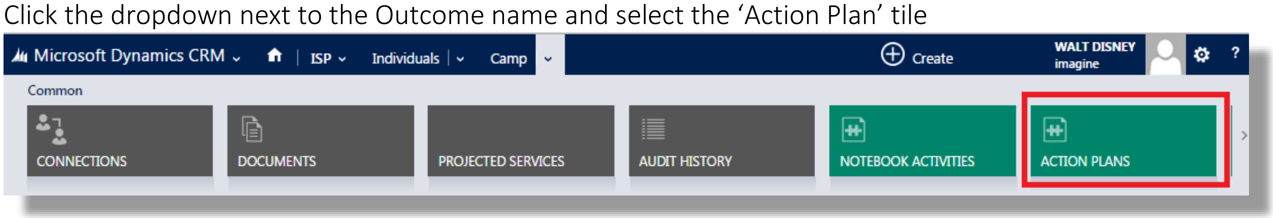
5. Double Click the Action Plan to open
6. Update Action Plan
7. Click 'Save & Close'

Assign Action Plan

1. From the Individual Front Page, click the dropdown next to the Individual's Name
2. Select the 'Outcomes' tile



3. Double-click on the selected 'Outcome'
4. Click the dropdown next to the Outcome name and select the 'Action Plan' tile



5. Either open an existing Action Plan or '+Add New Action Plans', an action plan pop up will display

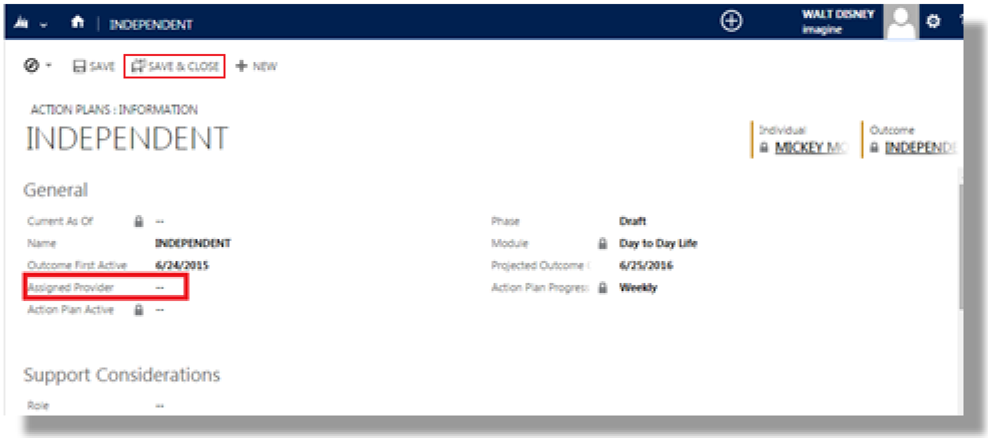


Figure 98- Assign Action Plan

6. Click in the ‘Assign Provider’ field and search for the Provider
7. Click ‘Save & Close’

Print Action Plan Report

1. From the Individual Front Page, click on the More Commands (…)
2. Click ‘Run Report’
3. Click on ‘Action Plan’
4. Action Plan Report will be generated

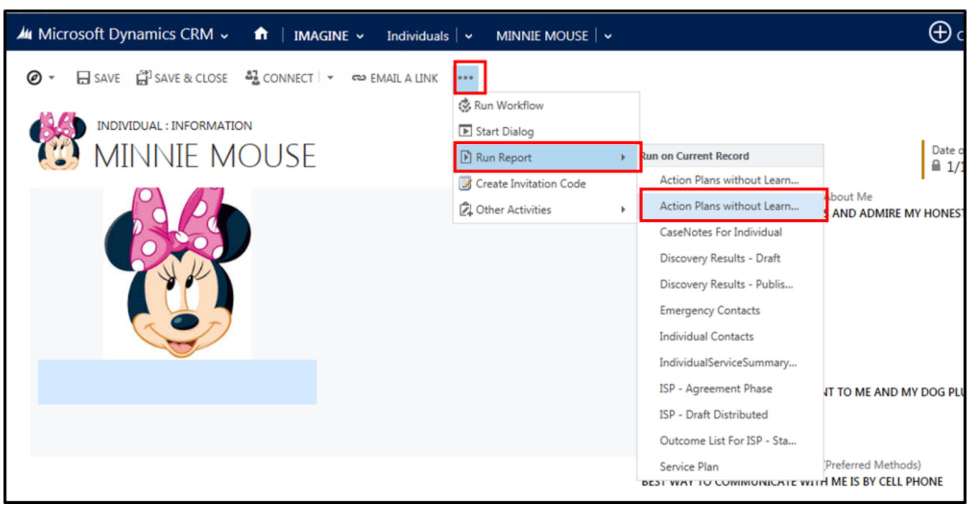


Figure 99- Print Action Plan

ISP

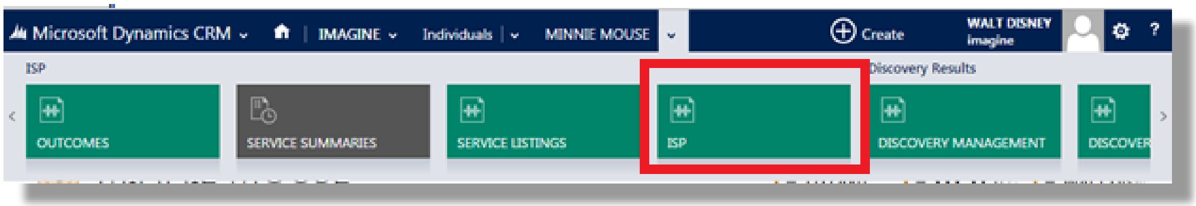
The Individual Service Plan (ISP) is the written details of the supports, activities, and resources required for the Individual to achieve personal goals.

Once the Outcome and Action Plan have been established, the ISP can now be phased.

Preparation for the ISP:

- Discovery Modules in Draft-Distributed Phase
- Outcomes in Draft Distributed Phase
- Service Summary in Approval Requested Phase

1. From the Individual Front Page, click the dropdown next to the Individual's Name
2. Select the 'ISP tile



3. Double-click the ISP link to open

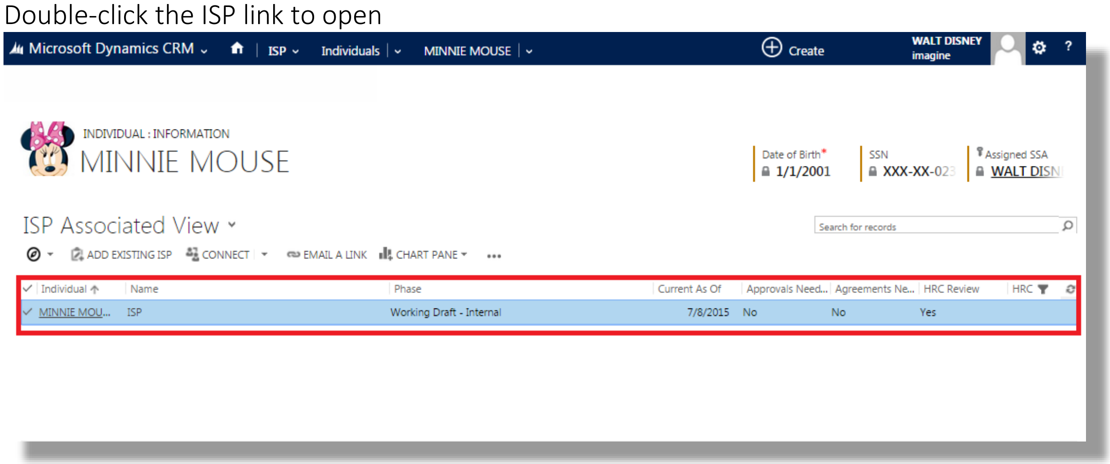


Figure 100- Open ISP

4. Move the ISP through the Phases by clicking on the More Commands (...) and select 'Next Phase'

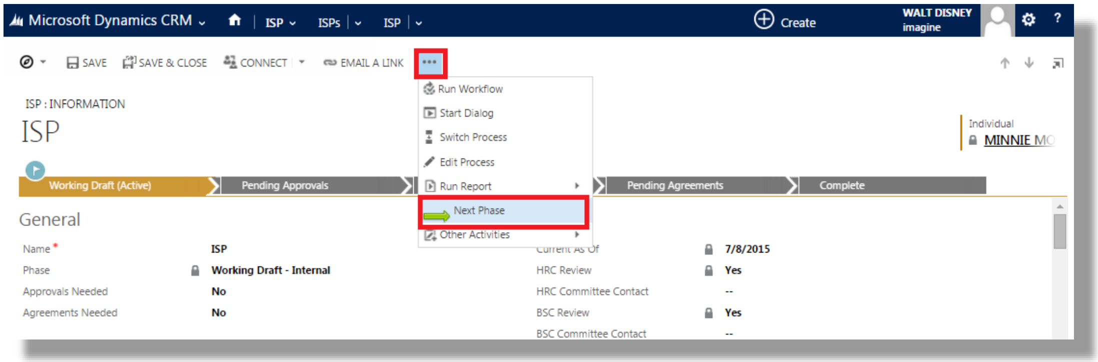


Figure 101- ISP Next Phase

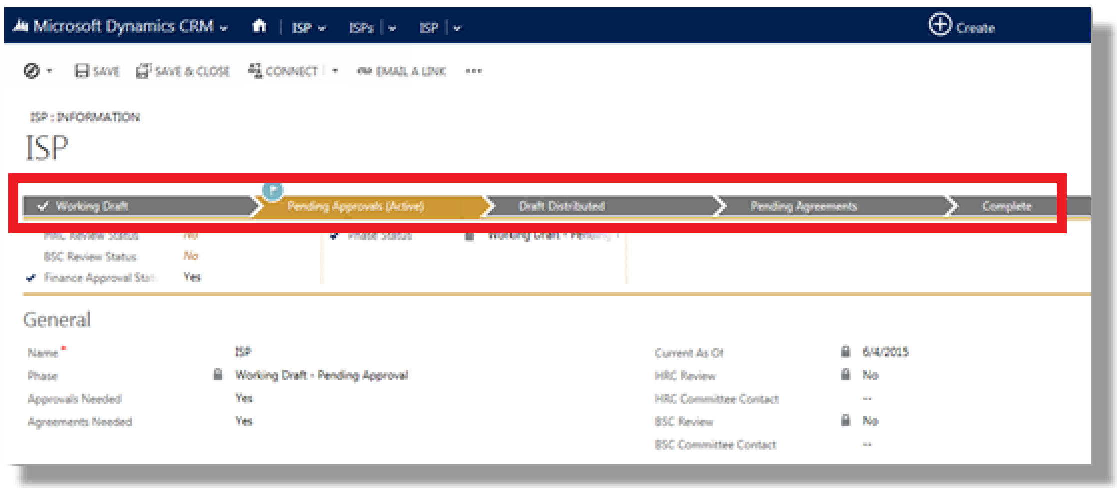


Figure 102- ISP Phasing

Phase 1 – Working Draft- Internal

ISP link is automatically created upon creation of the Individual. This is the initial Phase.

Phase 2 – Working Draft-Pending Approval

This phase waits for the approval from team members BSC/HRC and Finance.

Phase 3 – Working Draft-Review Required

It only goes to this phase if you Supervisor has a review setting to review your outcomes

Phase 4 – Draft Distributed

A draft of the plan can now be seen by the portal users. The portal users will provide feedback.
If there are assigned team members that do not use ***imagineIS***, the SSA will need to send the plan to them and gather feedback manually.

Phase 5– Pending Agreement

The portal users can see the final version of the ISP and will agree to the plan. This phase requires agreement from the Provider, Individual and the Guardian.

If they do not use imagine IS the SSA will need to collect the signatures manually. This can be scanned and pinned in the folders
ISP can be printed from front page in this phase.

Phase 6 – Complete- Ready to Publish

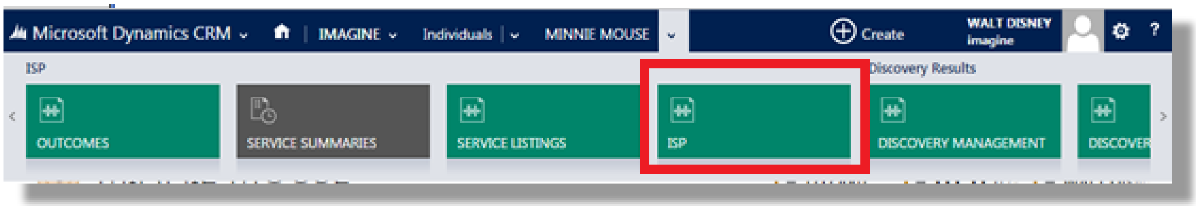
Ready to publish. This phase occurs after all agreements are received

Phase 7 – Publish ISP

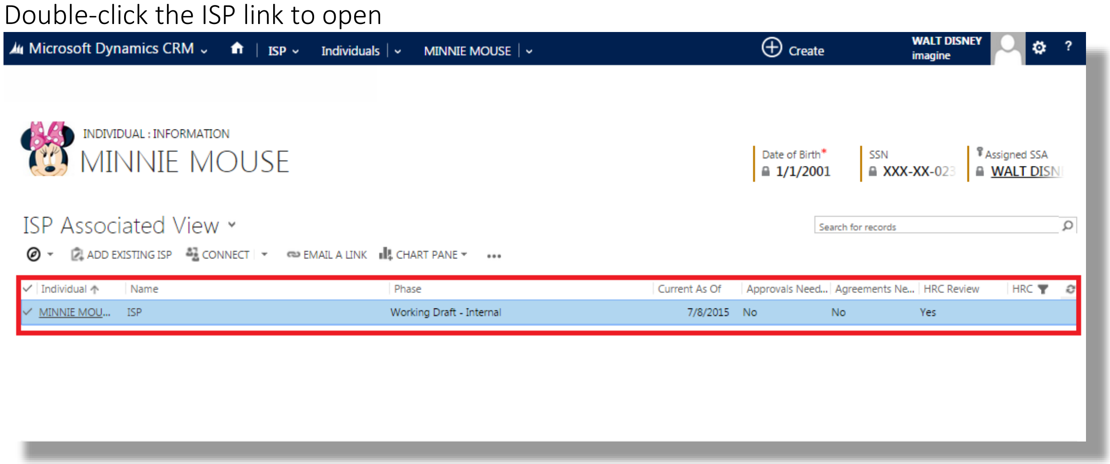
ISP does not stop in this phase but once it is published it automatically resets to working draft-internal. READ THE POP UP

ISP Agreement-Funding Approval

1. From the Individual Front Page, click the dropdown next to the Individual's Name
2. Select the 'ISP tile



3. Double-click the ISP link to open



4. Scroll to the 'Approval Tracking Finance' and open to manually change the 'Approval Received' field to 'Yes' and enter the 'Approval Date'

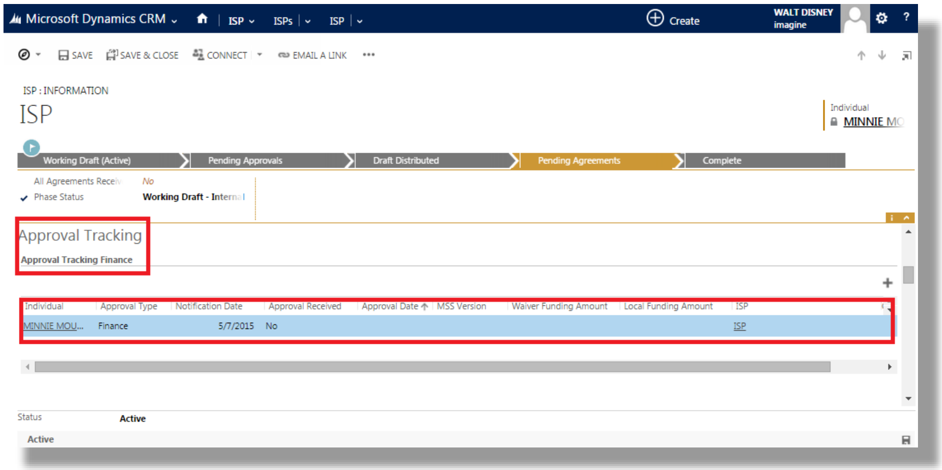
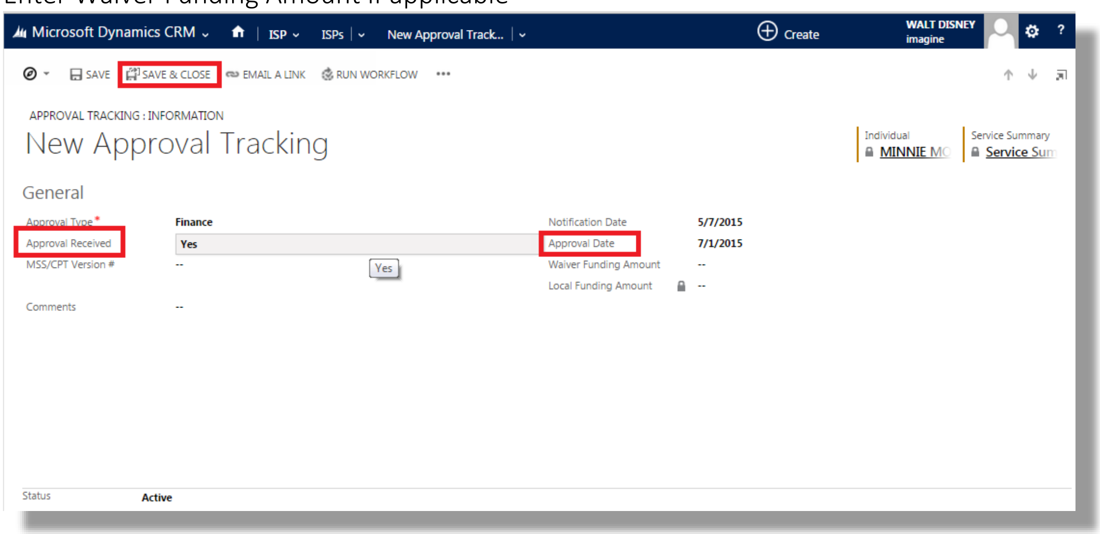


Figure 103- Approval Tracker

5. Double-click Finance Approval Tracking to open
6. Enter Waiver Funding Amount if applicable

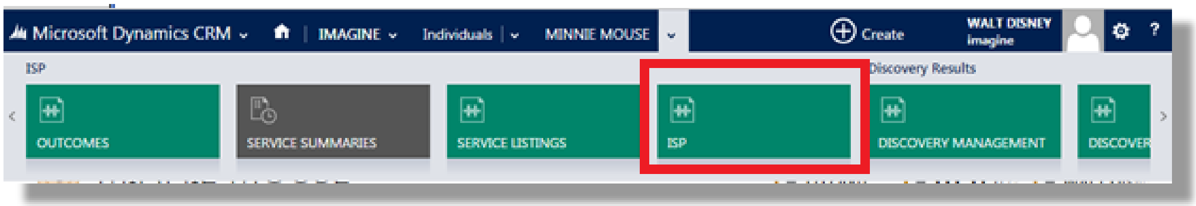


7. Click in the ‘Approval Received’ field to change it to ‘Yes’
8. Enter ‘Approval Date’
9. Click ‘Save & Close’

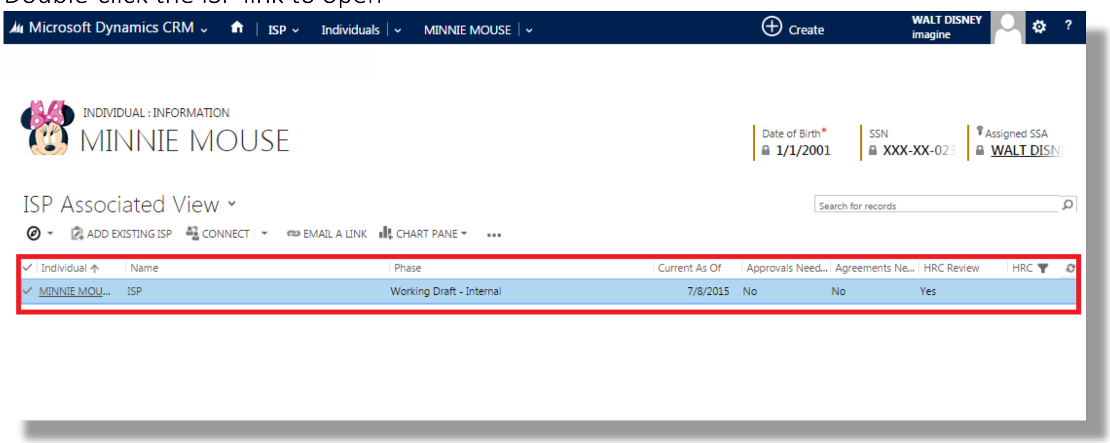
Publish ISP

Once all agreements have been received the ISP is ready to be published. Current Phase must be Completed-Ready to Publish.

1. From the Individual Front Page, click the dropdown next to the Individual's Name
2. Select the 'ISP tile



3. Double-click the ISP link to open



4. Click on the More Commands (…) and select 'Publish'

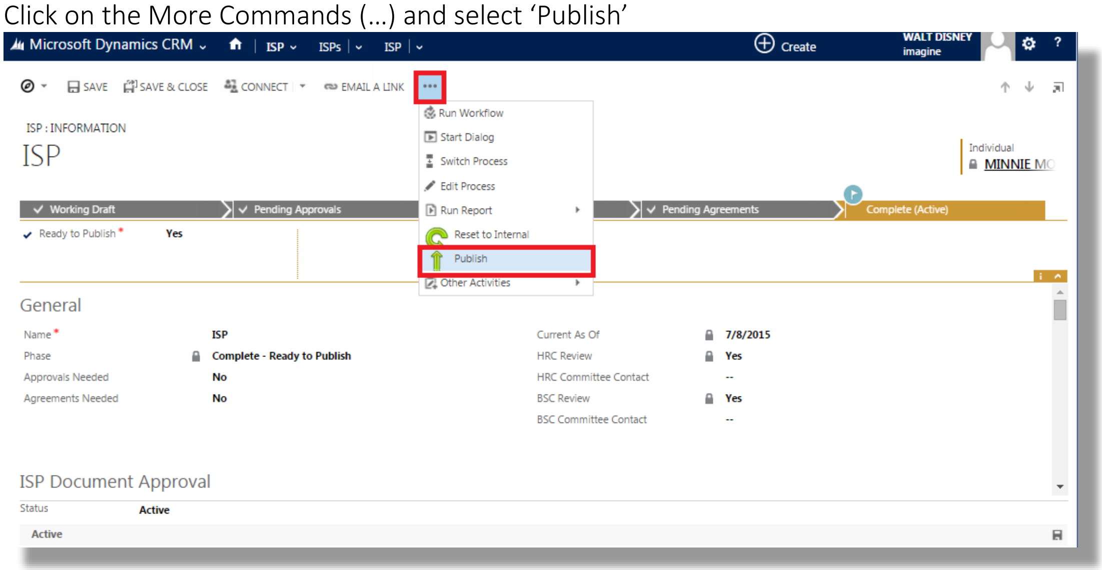


Figure 104- ISP Publish Phase

5. The following message will display:

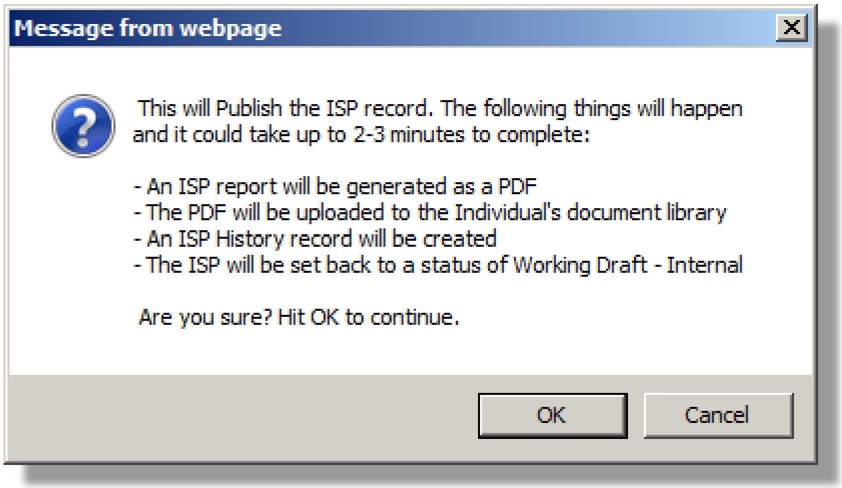


Figure 105- Publish ISP

6. Click 'OK'
   When the ISP is published a copy of the ISP is saved to SharePoint, and a new version created in a Working Draft-Internal phase. Any updates to the ISP will be made on the Working Draft-Internal copy and phased through the application. When changes are made and published a new Working Draft-Internal will be created.

Printing ISP Report

Note: Published ISPs must be printed from the Documents Tile. This section does not print published ISPs.

1. From the Individual Front Page, click on the More Commands (...)

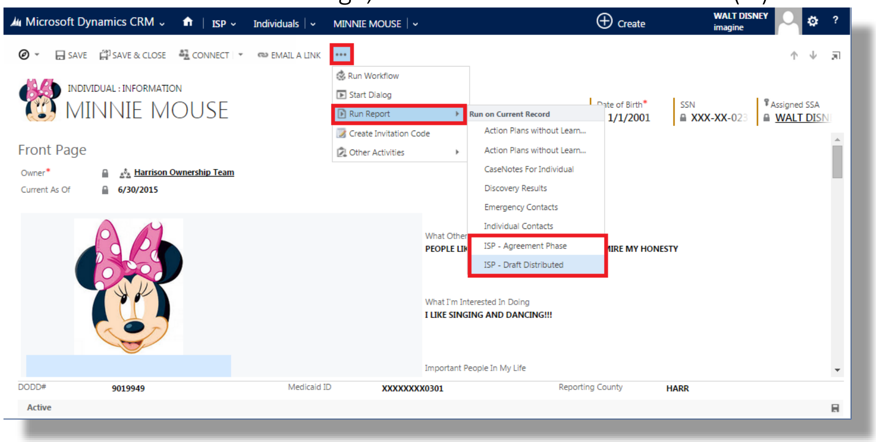


Figure 106- Print ISP Report

2. Click ‘Run Report’
3. Click the ISP to print (ISP must be in Agreement or Draft Distributed Phase)
4. Report will be generated, Click the ‘Export’ button
5. Click the ‘Acrobat PDF File’

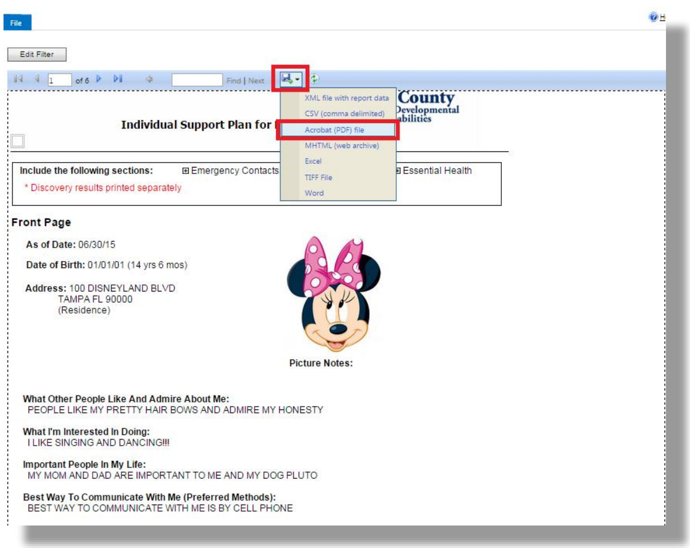


Figure 107- ISP Print Report

6. A PDF copy of the ISP is downloaded to the browser

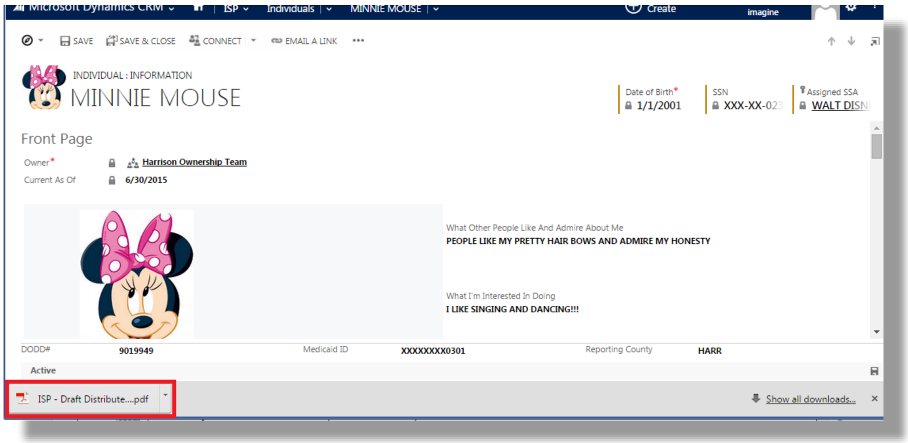
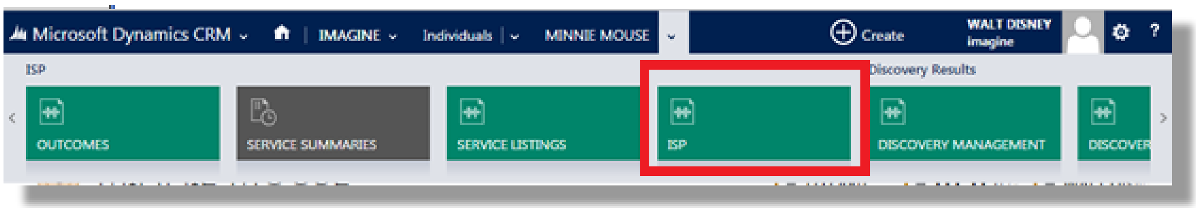


Figure 108- ISP PDF Download

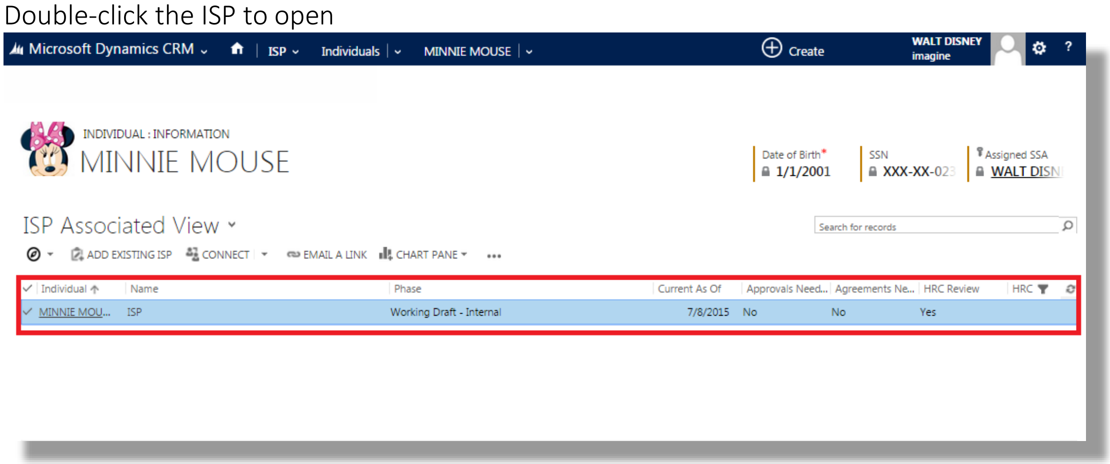
Manual Signatures

Manual Signatures allow team members who do not have portal access and require manual signatures to submit agreements without having to access ***imagineIS*** online. The SSA will print the ISP and mail or save the ISP and email to the parties. When agreements have been received, go to the 'Agreement Tracker' and manually enter the agreement.

1. From the Individual Front Page, click the dropdown next to the Individual's Name
2. Select the 'ISP tile



3. Double-click the ISP to open



4. Scroll to the 'Agreement Tracking' and double-click the entry in the listing you would like to open

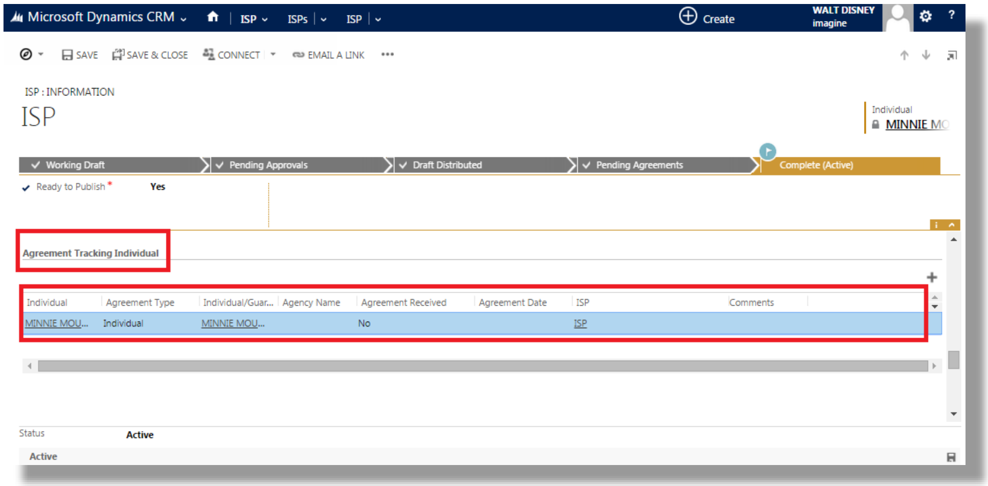


Figure 109- Agreement Tracking Grid

5. Manually change the 'Agreement Received' field to 'Yes' and enter the Agreement Date'

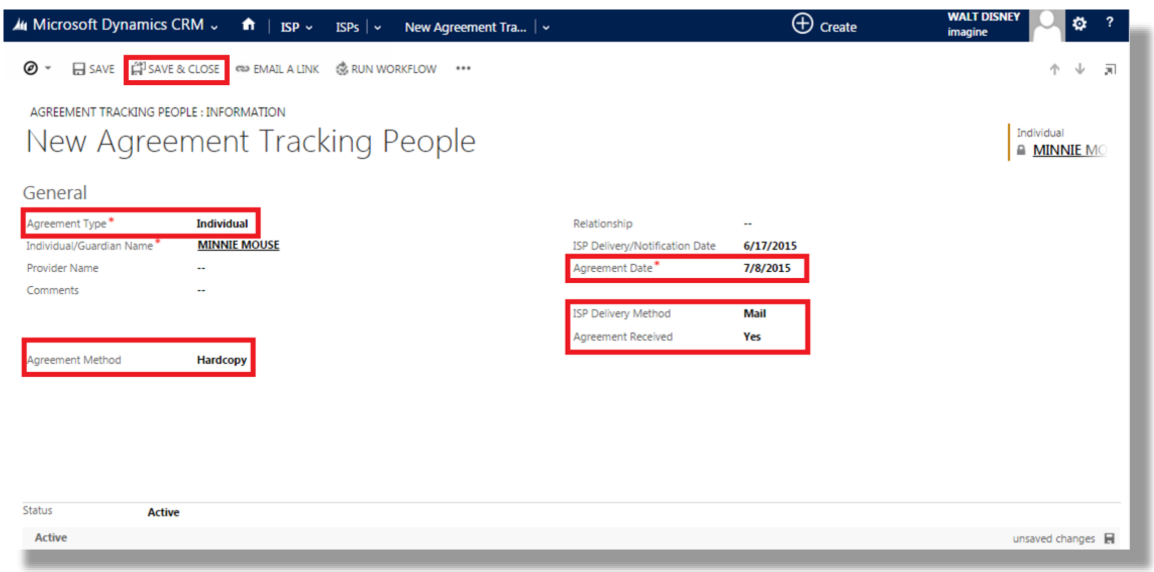


Figure 110- Agreement Received

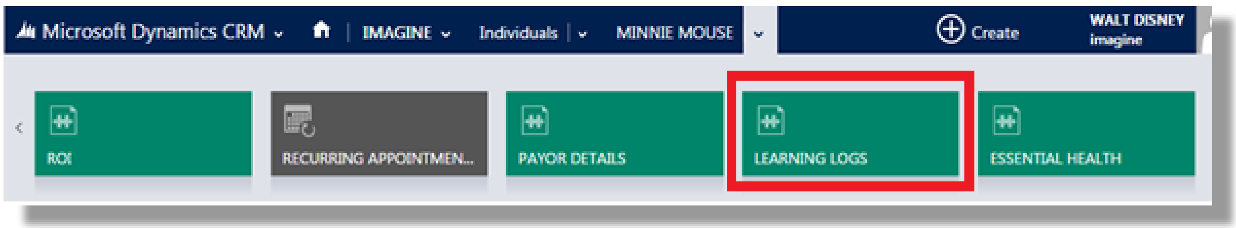
6. Click 'Save & Close'

Learning Logs

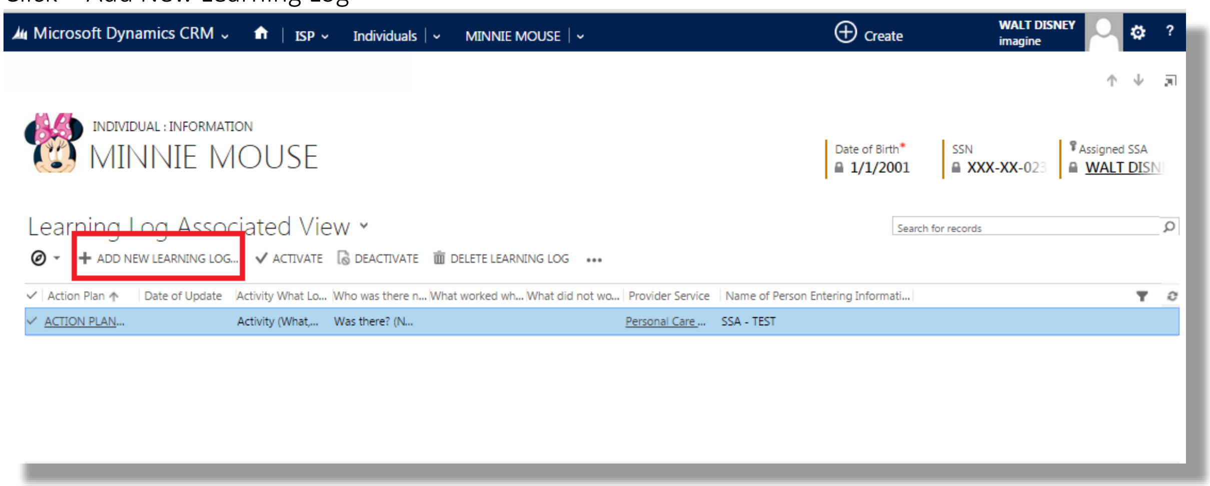
A Learning Log is new knowledge gained through the execution of the Action Plan. It also serves as 'Lessons Learned', things that were done well, and things could be improved.

Create Learning Log

1. From the Individual's Front Page, click the dropdown next to the Individual's Name, Select the 'Learning Logs' tile



2. Click '+Add New Learning Log'



3. Enter Learning Log details

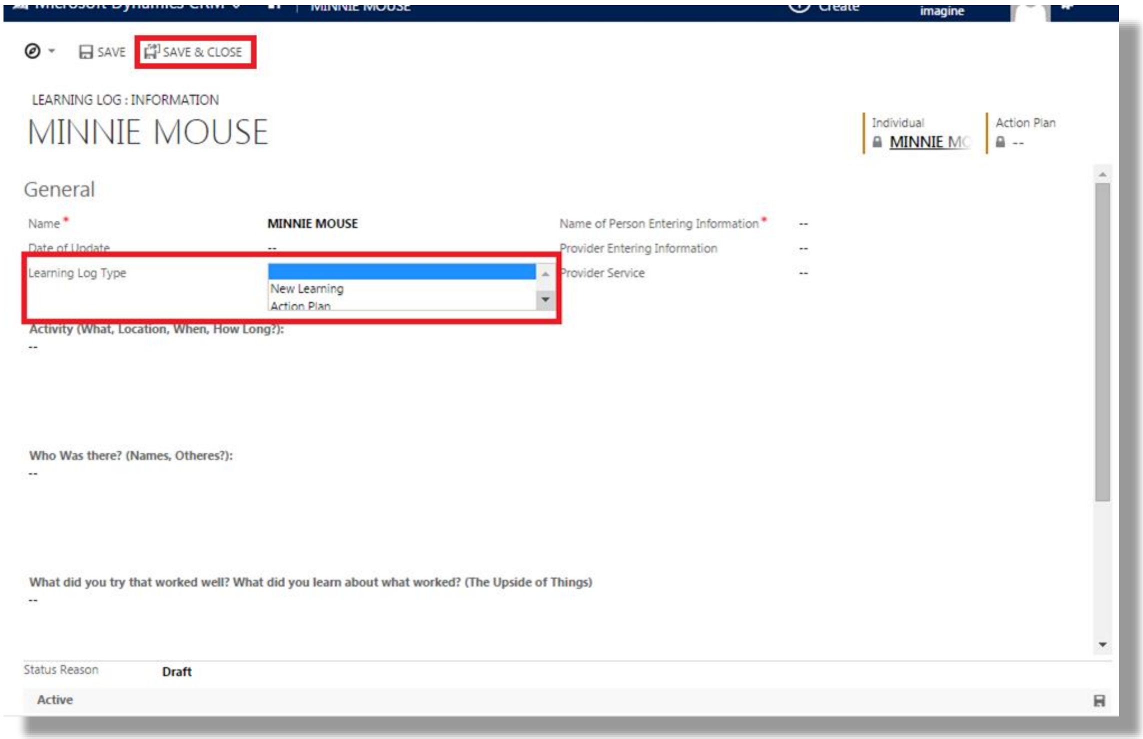
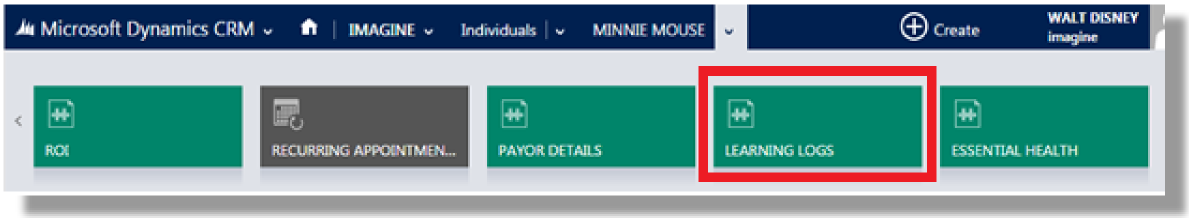


Figure 111 – New Learning Log

4. Click 'Save & Close'
   Note: <u>DO NOT</u> enter information in the 'Provider Entering Information', unless creating a 'Manual' Learning Log for a Provider who does not have Portal access.

Learning Log Review

1. From the Individual's Front Page, click the dropdown next to the Individual's Name, Select the 'Learning Logs' tile



2. Double-click the Learning Log you want to review

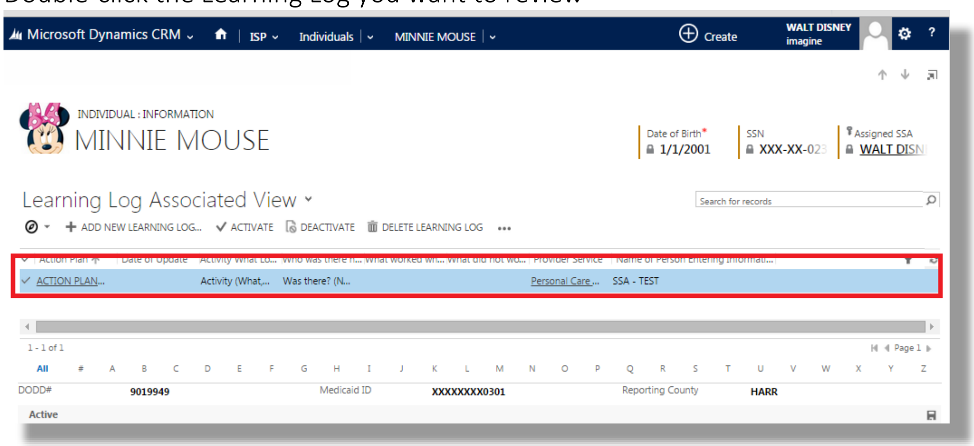


Figure 112- Learning Log Review

Case Notes

Adding a Case Note

1. From the Individual's Front Page, scroll down to the 'Case Notes' section and click on the link

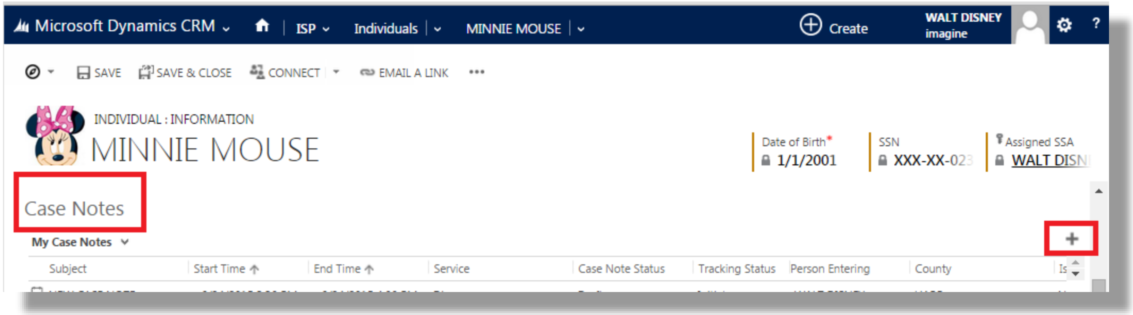


Figure 113- Add New Case Note

2. Click on the '+' to add new; following pop up will display

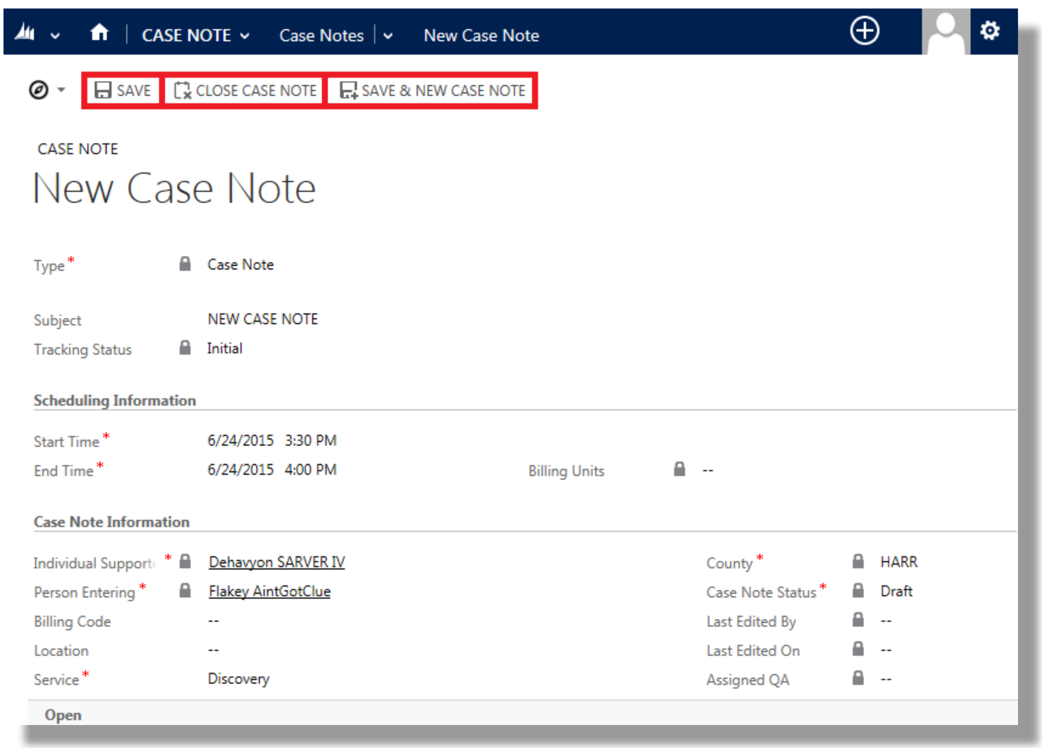


Figure 114- Case Note Details

3. Click 'Save'
4. Click 'Close Case Note' if done or 'Save & New Case Note' to enter another one
5. Case Note now appears in the list.
6. Open the case note again, change the status to 'Ready for Review'
7. Select 'Save & Close'
8. Case note will now be available for review by QA.

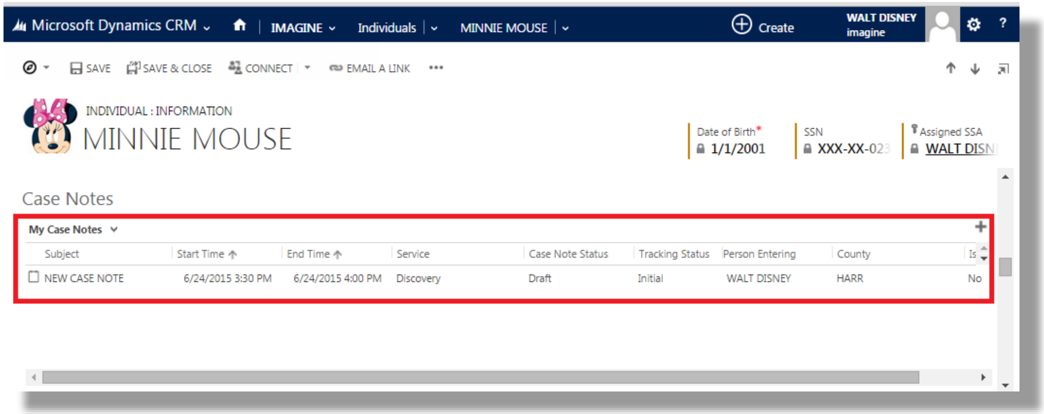


Figure 115- Case Note List

Alerts

Create an Alert

1. From the Individual's Front Page click on the More Commands (...)
2. Click on 'Other Activities'
3. Click 'Alert

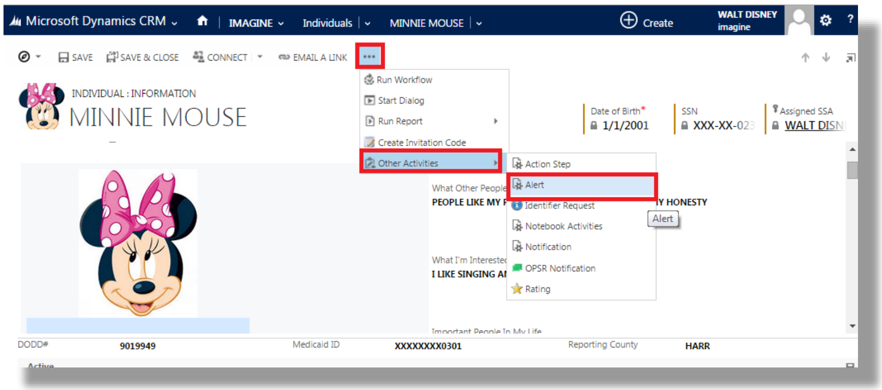


Figure 116- New Alert

4. New Alert screen will display; Enter required data.
   Note: You must change the recipient to who the Alert is being sent to

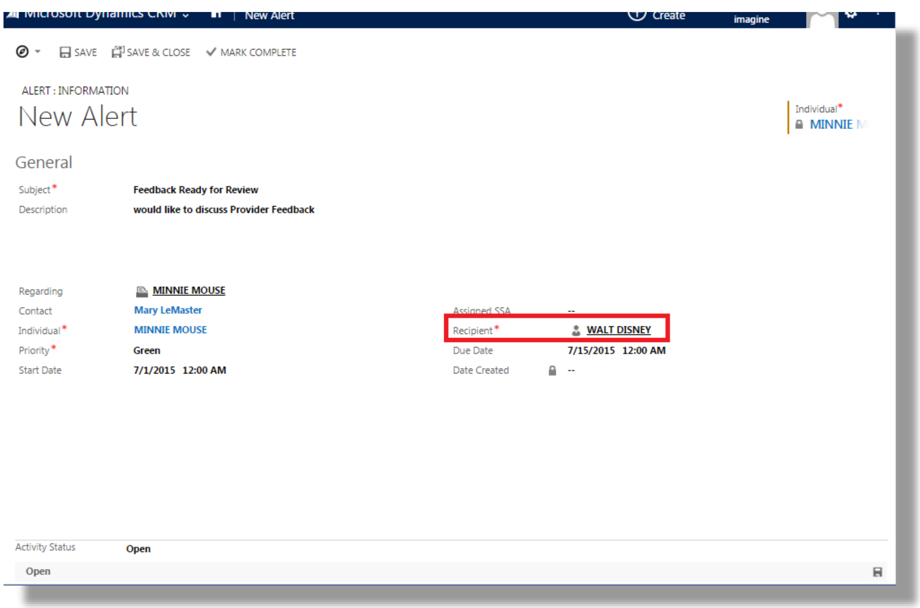


Figure 117- Alert Details

System Generated Alerts

Notification Name	Trigger	Role to Receive Notification	Visual Cue	Message Title	Message Content
Alert when someone loses Medicaid Eligibility	Medicaid eligibility span (current one) end date is past current date	Assigned Team member and SSA	Red	Medicaid Eligibility expired	Medicaid eligibility has expired for [Individual Name] on [Medicaid eligibility span end date]
No changes or additions in any of the sections :Quick Summaries, Outcomes, Action Plans, L&L	No change in current as-of date for 6 months	SSA	Yellow	No changes in key sections for 6 months	There have been no changes recorded to key areas of [Individual Name]'s record for 6 months. Please confirm that this is accurate.
Yellow Alert when Agreement not received from Assigned Team Member	On (Agreement sent date+15=current date) day a yellow alert is generated	SSA	Yellow	Yellow alert - Agreement still needed from Provider	Alert - Agreement is still needed from [Assigned Team Member] for [Individual Name] 's Plan
Yellow Alert when Agreement not received from Individual	On (Agreement sent date+15=current date) day a yellow alert is generated	SSA	Yellow	Yellow alert - Agreement still needed from Individual	Alert - Agreement is still needed from [Individual Name]
Red Alert when Agreement not received from Assigned Team Member	On (Agreement sent date+21=current date) day a yellow alert is generated	SSA	Red	Red alert - Agreement still needed from Provider	Alert - Agreement is still needed from [Assigned Team Member] for [Individual Name] 's Plan
Red Alert when Agreement not received from Individual	On (Agreement sent date+21=current date) day a yellow alert is generated	SSA	Red	Red alert - Agreement still needed from Individual	Alert - Agreement is still needed from [Individual Name]

Yellow Alert when Agreement not completed by Assigned Team member	On (Agreement sent date+xx=current date) day a yellow alert is generated	Assigned Team member			
Yellow Alert when Agreement not completed by Individual	On (Agreement sent date+xx=current date) day a yellow alert is generated	Individual			
Red Alert when Agreement not completed by Assigned Team Member	On (Agreement sent date+yy=current date) day a yellow alert is generated	Assigned Team member			
Red Alert when Agreement not completed by Individual	On (Agreement sent date+yy=current date) day a yellow alert is generated	Individual			
Outstanding status report		SSA			
Status report not submitted		Program Manager			

Notifications

Create a Notification

1. From the Individual's Front Page click on the More Commands (...)
2. Click on 'Other Activities'
3. Click 'Notification'

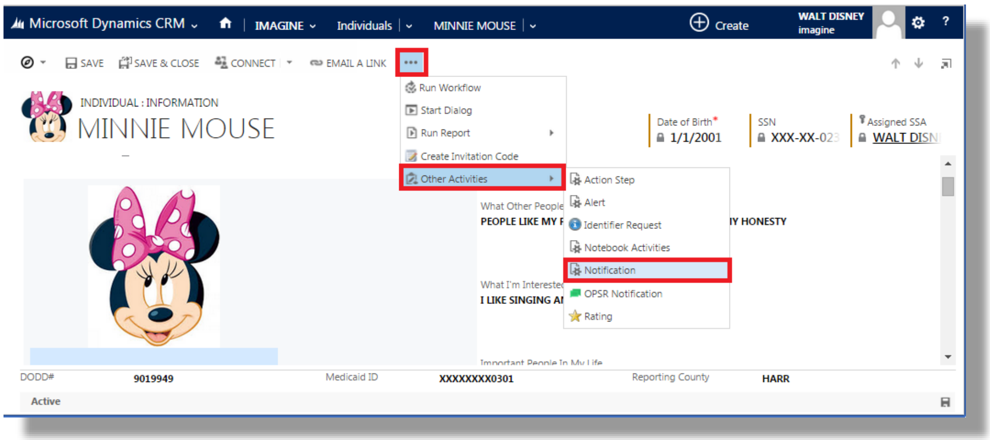


Figure 118- New Notification

4. New Notification screen will display; Enter required data.
   Note: You must change the recipient to who the Notification is being sent to

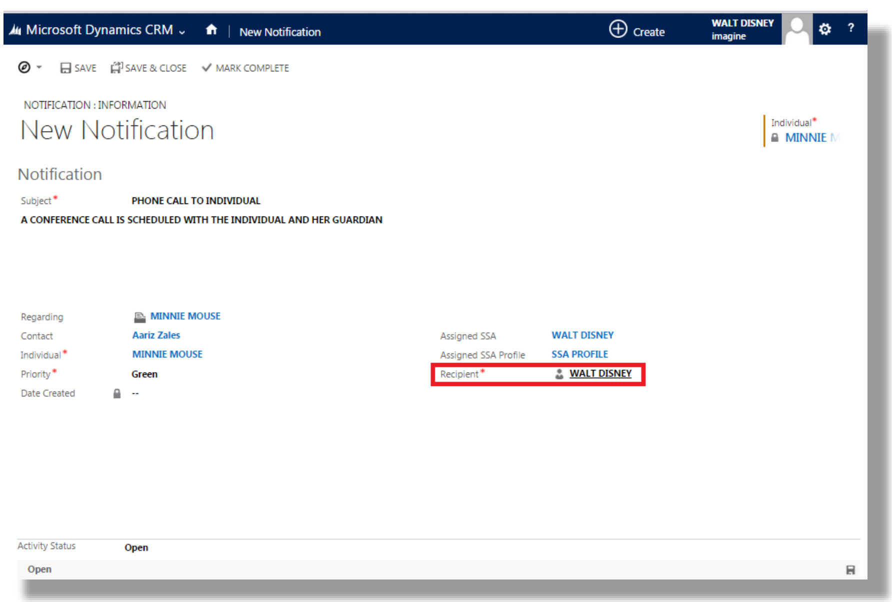


Figure 119- Notification Details

System Generated Notifications

Notification Name	Trigger	Role to Receive Notification	Visual Cue	Message Title	Message Content
Notification of New SSA Assigned	SSA Supervisor/Direct or changes the assigned SSA for an Individual	Assigned Team Members	Green	"New SSA Assignment "	"[Dynamic User Name of New SSA] has been assigned as the SSA for [Dynamic Name of Individual] as of [Dynamic Current as of Date]." Add supplemental text as an additional paragraph.
Notification of New SSA Assigned	SSA Supervisor/Direct or changes the assigned SSA for an Individual	Assigned SSA	Green	"New Assignment of an Individual "	"You have been assigned as the SSA for [Dynamic Name of Individual] as of [Dynamic Current as of Date]."Add supplemental text as an additional paragraph.
Notification of new uploaded files (front page, more about me)	Indiv/Fam/Guard uploads new file(s) to Front Page or More About Me	Assigned SSA	Green	Picture/Media Updates	"Files need confirmation for [Individual Name]'s Front Page or More About Me"
Notification of front page edits by indiv/fam/guard	Indiv/Fam/Guard edits any field on Front Page	Assigned Team Members	Green	Front Page Updates	"Updates made to [Individual Name] Front Page"
Notification of Photo Confirmed by SSA	A photo is reviewed and marked "confirm" by assigned SSA	Assigned Team Members	Green	Picture/Media Updates	"Updates made to [Individual Name] Front Page or More About Me"
Notification of contact updates for emergency contacts	SSA adds or edits an emergency contact (this includes if an emergency contact is unselected as an emergency contact)	Assigned Team Members	Yellow	Emergency Contact Update	"Updates made to [Individual Name]'s Emergency Contact List"
Notification of new Provider assigned to individual	SSA adds new Assigned Team member - Provider/Program Mgr to an individual's contact page	Assigned Team Members	Green	New Assigned Team Member	"A new assigned team member has been added". (Program Manager - Provider Agency Name) is now a member of (Individual's) support team.
Notification of discovery results changes	"Draft" and "Publish" are the triggers	Assigned Team Members	Green	Discovery Updates	"Updates made to [Individual Name] Discovery" (if Draft add the following) Did we get it right?
Notification of essential health updates	Any update to any field in Essential Health should trigger notification	Assigned Team Members	Yellow	Essential Health Updates	"Updates made to [Individual Name] Essential Health"
Ability to receive feedback when a Team Member,	Team member provides feedback in	SSA	Green	Discovery Feedback	There is feedback provided on Discovery Results -[Module Name] for [Individual Name]

Individual and/or Guardian has provided feedback on Discovery	"notes" for Discovery Results				
Notification of new document for an Individual	A document is uploaded by an assigned team member	Assigned SSA	Green	New Document Submitted	A new document has been submitted by {user name} for {individual name}
Notification to Supervisor to review prior to assigned team distribution for feedback.	When Outcome status is changed to Working Draft - Review Required.	SSA Supervisor	Yellow	Outcome Review Requested	A draft outcome for [Individual Name} is ready for review prior to sending to the Assigned Team for feedback.
Notification to Supervisor that the Outcome has been sent to the Assigned team for feedback.	When Outcome status is changed to Draft Distributed.	SSA Supervisor	Green	Outcome Distributed for Feedback	A draft outcome for [Individual Name] has been sent for Assigned Team feedback.
Notification to Team for feedback on new Outcomes and related Projected Services	SSA changes Outcome status to Draft Distributed. This is for each individual outcome	Assigned team	Green	Outcomes Feedback Requested	Did we get it right?
Ability to receive feedback when a Team Member, Individual and/or Guardian has provided feedback on Outcomes	Team member provides feedback in "notes" for Outcomes	SSA	Green	Outcomes Feedback	There is feedback provided on Outcomes for [Individual Name]
Notification to Budget Support Specialist	Outcomes are bundled together and in a status that is ready for the Budget Support Specialist	Budget Support Specialist	Green	Cost Projection Needed	A Cost Projection needs to be prepared for [Individual Name]'s ISP.
Notification to SSA once Manual entry of Local cost is complete by Budget Support Specialist	Change of status by RS?	SSA	Green	Cost Projection Prepared	The Cost Projection has been prepared for [Individual Name]'s ISP.
Notification to SSA from Budget Support Specialist for modification of services	Deny Request?	SSA	Green	Modification Needed	Modification of the Service Listing is needed

Notification to Finance Manager cost approval requested by Budget Support Specialist	Approve Request?	Fiance Manager	Green	Approval Requested	The service cost is ready for approval.
Notification to BSC, HRC chair to Approve BSC, HRC request based on what is required	SSA sets Plan to a state that is ready for Approval	BSC, HRC Chair	Green	Approval Requested	BSC or HRC [Committee name] approval is needed for [Individual Name]'s ISP.
Notification of "Agreement Needed"	When SSA marks a plan as Draft Distributed (ready to be sent out to team for Agreement)	Provider	Yellow	Plan Agreement is Requested	Your agreement is needed for [Individual Name]'s Plan to become current
Notification of "Agreement Needed"	When SSA marks a plan as Draft Distributed (ready to be sent out to team for Agreement)	Individuals	Yellow	Plan Agreement is Requested	Your agreement is needed for your Individual Support Plan to become current.
Notification of "Agreement Needed"	When SSA marks a plan as Draft Distributed (ready to be sent out to team for Agreement)	Guardian	Yellow	Plan Agreement is Requested	Your agreement is needed in order for [Individual Name]'s new plan to become current.
Notification when agreement is received from all parties	ISP is moved to Complete Ready to Publish.	Assigned SSA	Green	Need to Publish New Plan	All needed agreements have been received. Move to Published.
ISP has been published	ISP is moved to Published	Assigned Team Members: Individual/Guardian/Family, provider	Green	New plan is current	The ISP for [Individual Name] is now current.
Notification of Action Plan Assignment	Action Plan is assigned by SSA	Assignee (SSA, Provider etc.,)	Green	Action Plan Assignment	An Action Plan for [individual Name] has been assigned for development
Notification of Action Plan changes	Provider makes changes to Action Plan	Assigned SSA, assigned team members; Individual/Guardian/Family	Green	Changes made to Action Plans	A change has been made to an Action Plan for [Individual Name] by (provider program manager)
SSA notification of LL entry	When LL is updated by anyone other than Assigned SSA - entry type is New Learning	Assigned SSA	Green	New Learning	New learning has been entered into the Learning Log for [Individual Name] by [Assigned Team Member]
SSA receives notification of	When LL is updated by anyone other	Assigned SSA	Green	Action Plan Update	An Action Plan for [individual Name] has been submitted

status report submission -	than Assigned SSA - entry type is Action Plan Status Update				
Notification of new pinned documents	SSA pins a document to any of the following areas of an individual's record: Front Page, Discovery Results, Essential Health, Outcomes, Service Summary (Part of an Outcome)	Assigned Team Members	Green	New Attachment	"A document has been attached to [Individual Name]'s record. The document name is [title] and is attached to the [page name] section."
Notification of changes to Plan to Team members	Changes made in specified areas that do not require agreement	Assigned Providers	Green	Changes made to Current Plan	(Section of plan) for [Individual Name] has been updated to be (Phase) as-of (Date) for (Individual's name)
Notification of changes to Plan to Team members	Changes made in specified areas that do not require agreement	Individual	Green	Changes made to Current Plan	(Section of plan) for [Individual Name] has been updated to be (Phase) as-of (Date)
Notification of changes to Plan to Team members	Changes made in specified areas that do not require agreement	Guardian	Green	Changes made to current plan	(Section of plan) for [Individual Name] has been updated to be (Phase) as-of (Date) for (Individual's name)
Notification of changes to Plan when changes are made to specific sections of an ISP that do require agreement (Outcomes, Support Considerations and/or Service Summary)	When a change in the identified sections does not result in a change to the Service Summary and the SSA sets the status of outcome to Draft Distributed.	Assigned Team Members: Individual/Guardian/Family/Provider	Green	Agreement	Your agreement is needed for [Individual Name]'s Plan to become current.
Notification when Medicaid is 45 days close to ending	Where current date = (Medicaid end date - xx)	SSA	Yellow	Medicaid card is Due to Expire Soon	Medicaid eligibility ends for [Individual Name] on [date].
Notification when an Individual is 30 days from turning 18	Individual's 18th birthday is 30 days from current date	SSA	Green	Turning 18	[Individual Name] is turning 18 on [Individual's Birthdate Mo/Day current year]
Notification of Upcoming Redetermination -	System generated - 60 days prior to waiver end date	Assigned SSA	Green	"Upcoming Re-Determination"	" The re-detemination date for [Invidividual Name, DODD #} is due on [Date]"

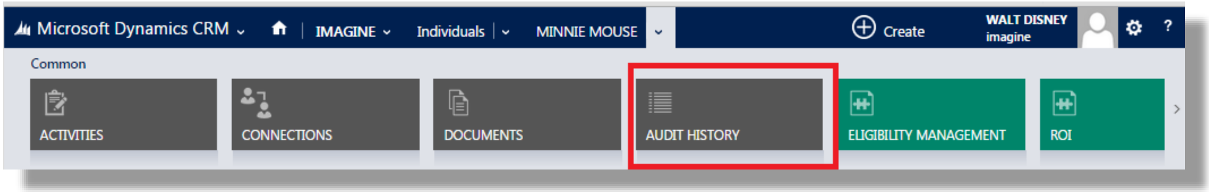
Escalation at 60 days					
Notification of Upcoming Redetermination - Escalation at 30 days	System generated - 30 days prior to waiver end date	Assigned SSA	Green	"Upcoming Re-Determination"	" The re-detemination date for [Invidividual Name, DODD #} is due on [Date]"
Notification to SSA when changes made to key demographics by DODD Data Admin	MDA Data Admin (DODD Role) edits an individual's SSN or Medicaid #	Assigned SSA	Yellow	Change made to SSN and/or Medicaid #	The Data Administrator has made a change to [Individual's Name]'s record DODD #[XXXXXX}. Please contact [Name of MDA Data Administrator] if you have any questions.
Notification of request for customer satisfaction feedback	Based on Satisfaction survey frequency in Outcome - how often (KPM stories also include satisfaction surveys)	Assigned Team Members	Green	Customer Satisfaction Information Requested	"Please give us information to help us improve"
Notification of request for customer satisfaction feedback	Based on Satisfaction survey frequency in Outcome - how often (KPM stories also include satisfaction surveys)	Assigned SSA	Green	Customer Satisfaction Information Requested	"Please give us information to help us improve"
Notification of New SSA Assigned	SSA Supervisor/Direct or changes the assigned SSA for an Individual	Assigned Team Members	Green	"New SSA Assignment "	"[Dynamic User Name of New SSA] has been assigned as the SSA for [Dynamic Name of Individual] as of [Dynamic Current as of Date]." Add supplemental text as an additional paragraph.
Notification of New SSA Assigned	SSA Supervisor/Direct or changes the assigned SSA for an Individual	Assigned SSA	Green	"New Assignment of an Individual "	"You have been assigned as the SSA for [Dynamic Name of Individual] as of [Dynamic Current as of Date]."Add supplemental text as an additional paragraph.
Notification of new uploaded files (front page, more about me)	Indiv/Fam/Guard uploads new file(s) to Front Page or More About Me	Assigned SSA	Green	Picture/Media Updates	"Files need confirmation for [Individual Name]'s Front Page or More About Me"
Notification of front page edits by indiv/fam/guard	Indiv/Fam/Guard edits any field on Front Page	Assigned Team Members	Green	Front Page Updates	"Updates made to [Individual Name] Front Page"
Notification of Photo Confirmed by SSA	A photo is reviewed and marked "confirm" by assigned SSA	Assigned Team Members	Green	Picture/Media Updates	"Updates made to [Individual Name] Front Page or More About Me"

Notification of contact updates for emergency contacts	SSA adds or edits an emergency contact (this includes if an emergency contact is unselected as an emergency contact)	Assigned Team Members	Yellow	Emergency Contact Update	"Updates made to [Individual Name]'s Emergency Contact List"
Notification of new Provider assigned to individual	SSA adds new Assigned Team member - Provider/Program Mgr to an individual's contact page	Assigned Team Members	Green	New Assigned Team Member	"A new assigned team member has been added". (Program Manager - Provider Agency Name) is now a member of (Individual's) support team.
Notification of discovery results changes	"Draft" and "Publish" are the triggers	Assigned Team Members	Green	Discovery Updates	"Updates made to [Individual Name] Discovery" (if Draft add the following) Did we get it right?
Notification of essential health updates	Any update to any field in Essential Health should trigger notification	Assigned Team Members	Yellow	Essential Health Updates	"Updates made to [Individual Name] Essential Health"
Ability to receive feedback when a Team Member, Individual and/or Guardian has provided feedback on Discovery	Team member provides feedback in "notes" for Discovery Results	SSA	Green	Discovery Feedback	There is feedback provided on Discovery Results -[Module Name] for [Individual Name]
Notification of new document for an Individual	A document is uploaded by an assigned team member	Assigned SSA	Green	New Document Submitted	A new document has been submitted by {user name} for {individual name}

Audit History

Audit History details field level changes and is an available Tile on each page/screen.

1. From the Individual Front Page, click the dropdown next to the Individual's Name, Select the 'Audit History' tile



2. The Audit History list of field changes

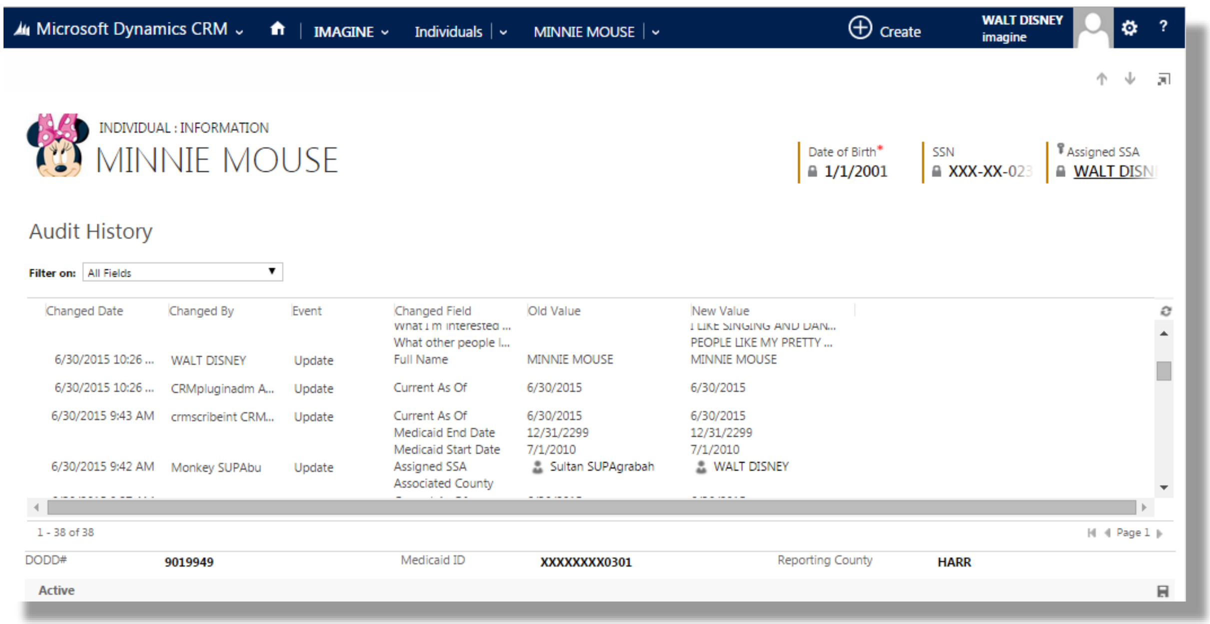


Figure 120- Audit History