



Finance Manager

August 2, 2015

DODD

Contents

Overview

Create a County Fiscal Year

Create a County Fund Source

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Create a New Provider and Invite them to ***imaginelS***

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Approve/Deny a Funding Request

Review Remaining Balance on County Fund Source Allocations

Questions

Overview (Class Structure)

- Learning by hearing AND by doing
- Buddy System (help your neighbor)
- No “One” left behind

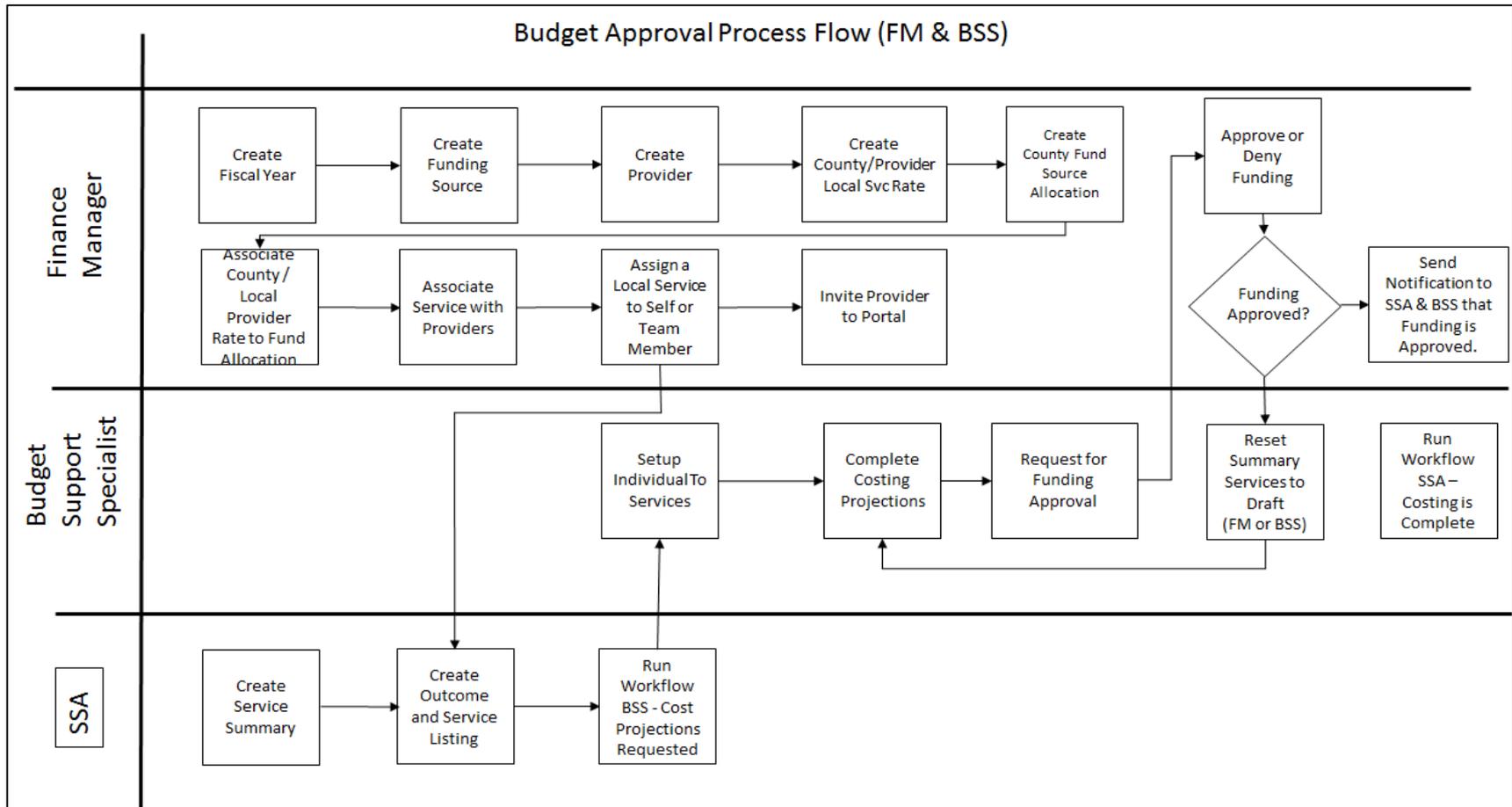
Overview (imagine/S and You)

- imagine Role vs Your Job Title
 - There is no correlation between the role name in **imagine/S** and the your job title.
 - **imagine/S** roles are not functional job description or organizational titles.
 - There is absolutely no reason to perform an agency restructure to fit the **imagine/S** roles.
 - One person can have the authorization of multiple roles in **imagine/S**

Overview

- Finance Manager Role in *imaginelS*
 - County Setup
 - Finance Approver
 - Use the FM Guide

Overview (Role Relationships)



Overview

Use the supplied IDs to
Sign on To ***imaginelS***
as
Finance Manager

Overview (FM Dashboard)

Microsoft Dynamics CRM | IMAGINE | Dashboards | Create | Little FMJohn imagine

SAVE AS | NEW | REFRESH ALL | ADVANCED FIND

Financial Approval Dashboard

My Funding Requests

My Service Summaries Pending Approval - Finance

Search for records

Individual	Name	Status Reason ↑	Total Amount	Individual's Budget Start...	Individual's Budget End D...
AKEEN Vukovi...	Service Summary - 2/1/2015 - 12/31/2015 - AKEEN...	Pending Appr...	\$131.25	2/1/2015	12/31/2015

Providers Pending Review in My County

Search for records

Company Name ↑	Status	Created By
CAKTest	Pending Review	Max FMGoof

Overview (FM Dashboard)

The screenshot displays the top navigation bar of the IMAGINE system. The 'Dashboards' menu is open, showing a list of system dashboards. The 'Financial Approval Dashboard' is highlighted in blue. A red box highlights the 'SET AS DEFAULT' button in the top navigation bar, and another red box highlights the dropdown arrow next to the 'Financial Approval Dashboard' title. Red numbers 1, 2, and 3 are placed near these elements to indicate the steps for setting a dashboard as default.

IMAGINE Dashboards

SAVE AS NEW SET AS DEFAULT REFRESH ALL

Financial Approval Dashboard

System Dashboards

- Agreement Tracking Dashboard
- Billing Specialist Dashboard
- Budget Support Specialist Financial Dashboard
- County Transfers
- Customer Service Representative Social Dashboa...
- Eligibility Specialist Dashboard
- Financial Approval Dashboard**
- FM Casenotes Dashboard
- Group Manager - Review Statistics

Overview (FM Dashboard)

Financial Approval Dashboard

My Funding Requests

My Service Summaries Pending Approval - Fin...

Search for records

Individual	Name	Status Reason	Total Amount	Individual's Budget Start...	Individual's Budget End D...
No Service Summary records found.					

My Tasks

Search for records

Priority	Subject	Regarding	Indivic
No Task records found.			

Providers Pending Review in My Cou...

Search for records

Company Name	Status	Created By
CAKTest	Pending Review	Max FMGoof
Spark's Local Service Pr...	Pending Review	FMDalmatian...

Local Services Expiring in 30 days

Search for records

Service Code	Service Category	Sub-Category	Rate Type	County	Rate Effective St...	Rate Effective E...	Rate Amount	Unit of Measure...
No Local Services records found.								

My Alerts

Search for records

Priority	Subject	Individual
----------	---------	------------

My Notifications

Search for records

Priority	Subject	Regarding
----------	---------	-----------

Overview

Terms and Basic Navigation

imaginelS Navigation (Terms)

CRM: Microsoft Dynamics CRM (customer relationship management) is the Microsoft platform that the imagine Information System was built on.

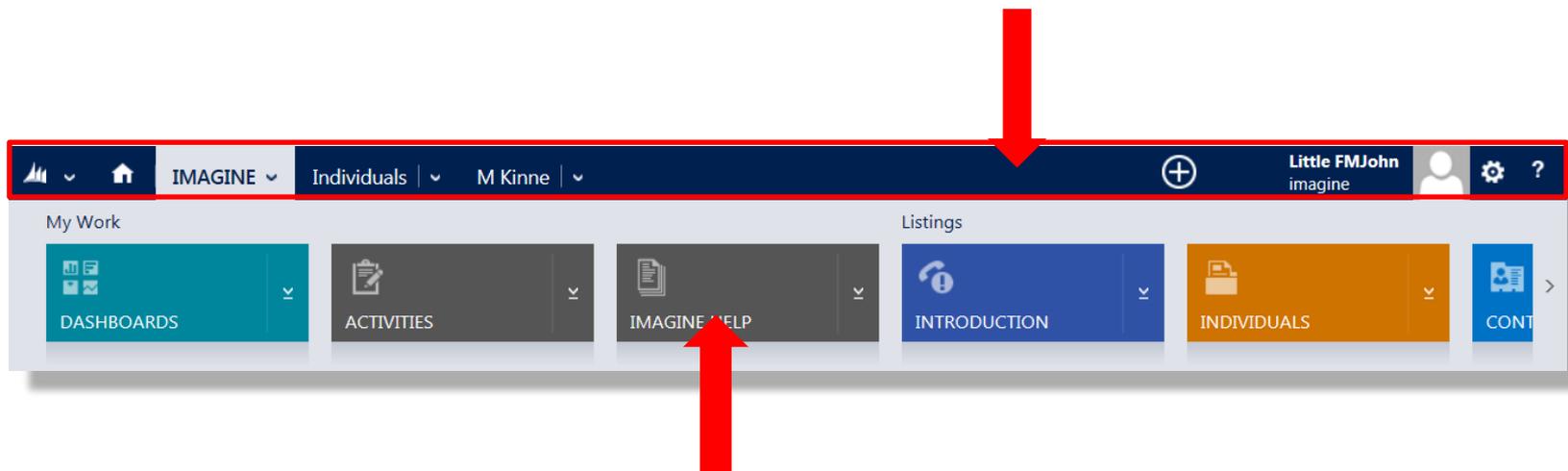
Portal: It is the part of ImaginelS that Individuals, family members, guardians, and providers use.

Dashboard: An “at a glance” view of information. Depending on the role, it shows the necessary sub grids, alerts, notifications, and tasks.

Front Page: This is the Individual’s (Facebook) page that is seen when first entering *ImaginelS*.

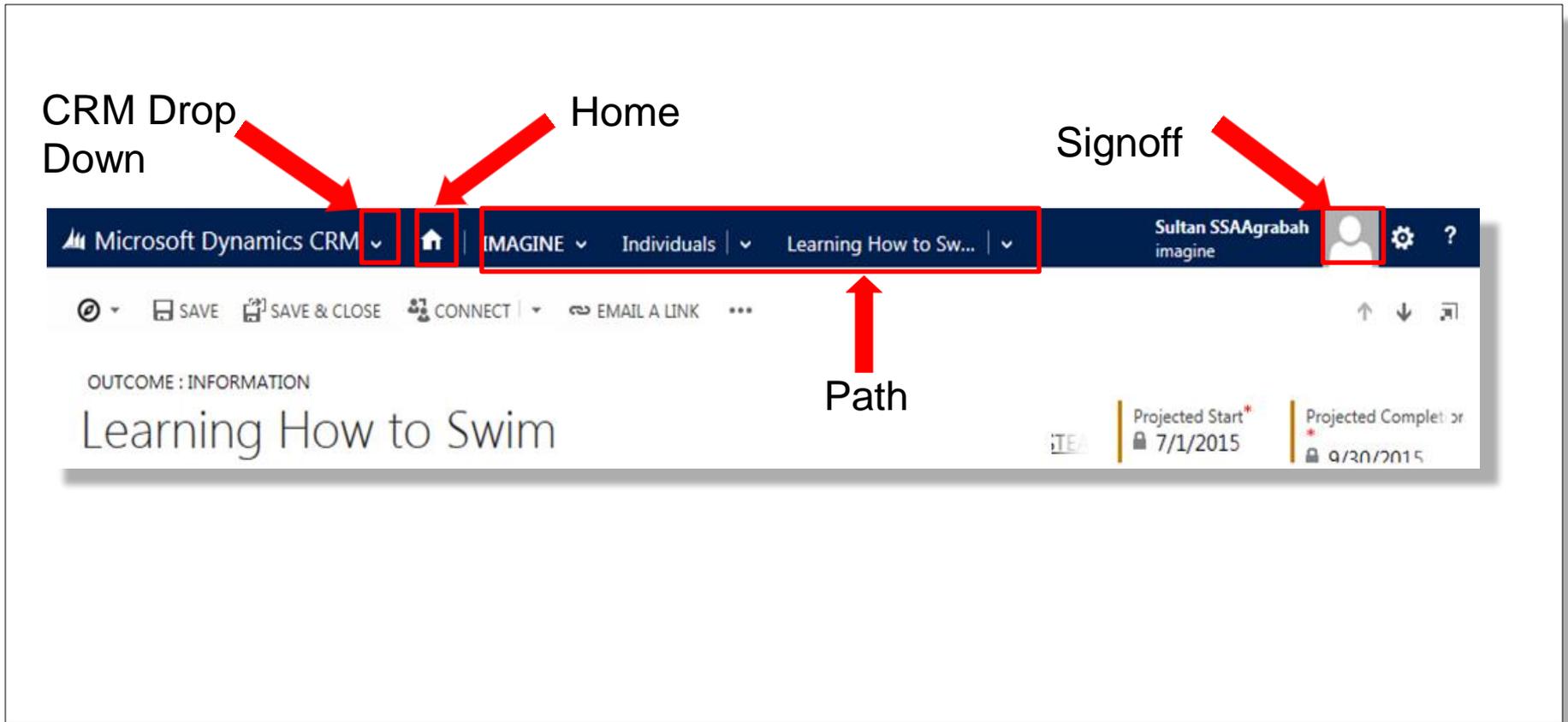
*imagine*S Navigation (Terms)

Navigation bar: The dark blue bar across the top used for navigation.



Tiles: When a down arrow is clicked in the navigation bar, a row of tiles will display. To go to that section of the system, click on a tile.

imagineIS Navigation (Terms)



imagineIS Navigation (Terms)

Ribbon: The ribbon contains the tools to work within a section of the navigation bar.

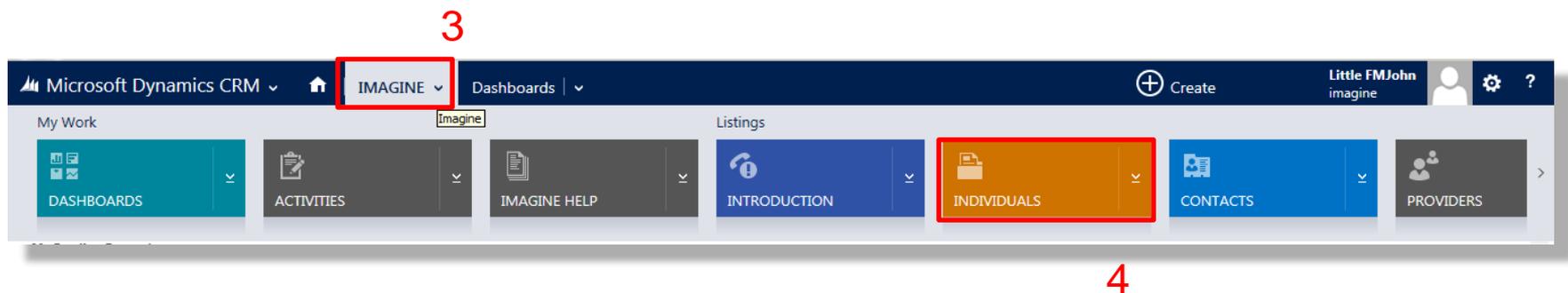
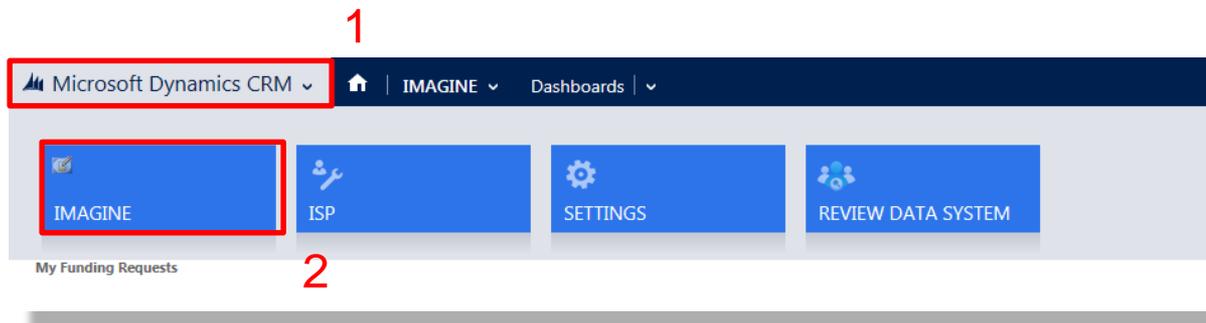
The screenshot displays the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM', a home icon, 'IMAGINE', and 'Dashboards'. Below this is a ribbon containing icons for 'SAVE AS', 'NEW', 'SET AS DEFAULT', and 'REFRESH ALL'. A red box highlights the ribbon area, with a red arrow pointing to it from the text 'Ribbon: The ribbon contains the tools to work within a section of the navigation bar.' Below the ribbon is a 'SSA Caseload View' section, also highlighted with a red box. A red arrow points to the dropdown arrow next to 'SSA Caseload View' with the text 'Dropdown arrow'. Below this is a table with a search bar and several columns: Full Name, Date of Birth, DODD#, SSN, Medicaid ID, Assigned SSA, Reporting County, and Residence County. A red arrow points to the table with the text 'Sub grid: Tables of information.'

Full Name	Date of Birth ↑	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County
John Doe	1/1/1975	6671882			Sherry Knox	FAIR	FAIR
Joshua Ross	1/18/1990	6671884	XXX-XX-3333	XXXXXXXXX9123	Sherry Knox	FAIR	FAIR
Stephan Short	2/28/1993	6671883	XXX-XX-6666	XXXXXXXXX2333	Sherry Knox	FAIR	FAIR
Mark Crawford	2/1/1997	6671879	XXX-XX-0987	XXXXXX7399	Sherry Knox	FAIR	FAIR

Sub grid: Tables of information.

imagineIS Navigation (Example)

How to navigate to an individuals front page...



imagineIS Navigation (Example)

IMAGINE Individuals

SEND DIRECT EMAIL COPY A LINK EMAIL A LINK RUN WORKFLOW

Active Individuals

Search for records

Full Name	Date of Birth ↑	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County	Date of Death
M Kinne	2/12/1946	9062017	XXX-XX-7778	XXXXXXXX1301		HARR	HARR	
NEHAMIAH VA...	3/24/1946	3126030	XXX-XX-3410	XXXXXXXX1201	SSAHiss Sir	HARR	HARR	

Charts

Microsoft Dynamics CRM IMAGINE Individuals M Kinne

Create

SAVE SAVE & CLOSE CONNECT EMAIL A LINK

INDIVIDUAL : INFORMATION

M Kinne

Date of Birth* 2/12/1946 SSN XXX-XX-7777 Assigned SSA --

There are no Case Notes for this individual. Please add if any.

- Front Page
- Case Notes
- Addresses
- More About Me
- Discovery Quick Summary
- Individual Quick Summary

Individual's Front Page

imaginelS Navigation (Mandatory Fields)

Microsoft Dynamics CRM | SETTINGS | County Fund Sourc... | New County Fund S...

SAVE SAVE & CLOSE + NEW

COUNTY FUND SOURCE/ALLOCATION : INFORMATION

New County Fund Source/Allocation

General

County*	 HARR	Funding Source*	<input type="text"/>
County Fiscal Year*	 --	County Number	--
CFSA Start Date	--	Assigned Finance Manager	--
CFSA End Date	--	Account Number/GL Code	--
CFS Code	--		
Owner*	 <u>Little FMJohn</u>		
Total Committed	--		

Locked Field – County is a locked field
An Asterisks (*) indicates a mandatory field
County, Fiscal year, Owner, and Funding Source are mandatory fields.

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Assign A Local Service to You (FM)

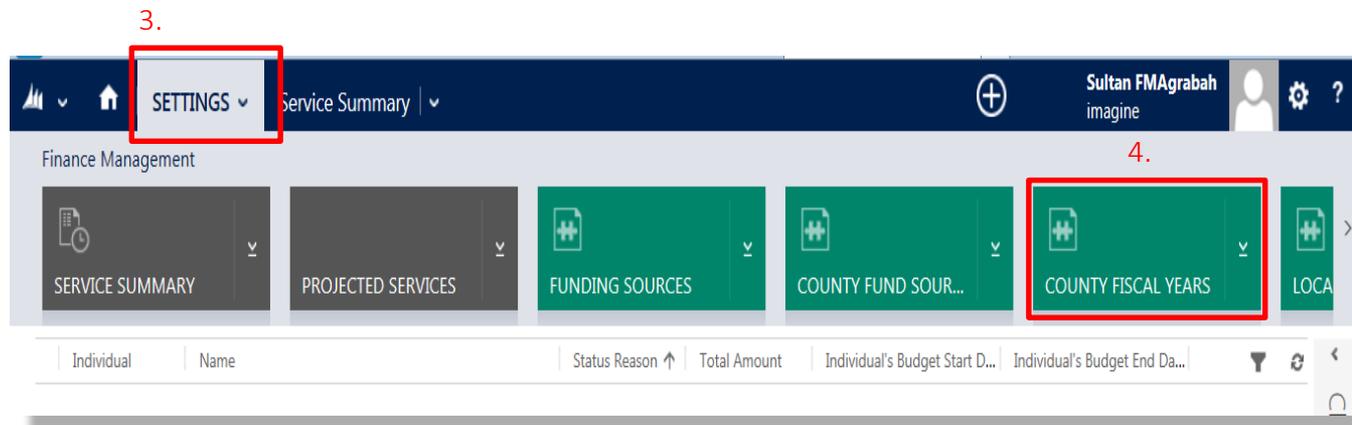
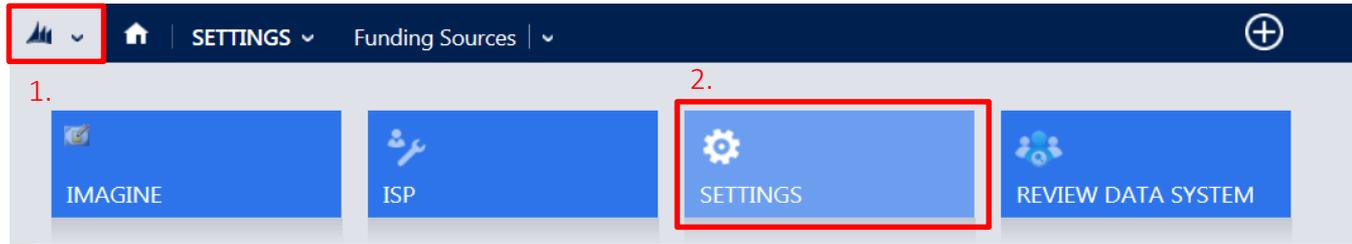
Associate a Service with Providers

Approve/Deny a Funding Request

Review Remaining Balance on County Fund Source Allocations

Questions

Create a County Fiscal Year



Create a County Fiscal Year

1.

2.

3.

FY establishes the date boundary by which the county operates.

General

County	BELM	Fiscal Year	2014-2015
Start Date	5/1/2014	End Date	4/30/2015
		Owner *	Mona Fin_Mgr

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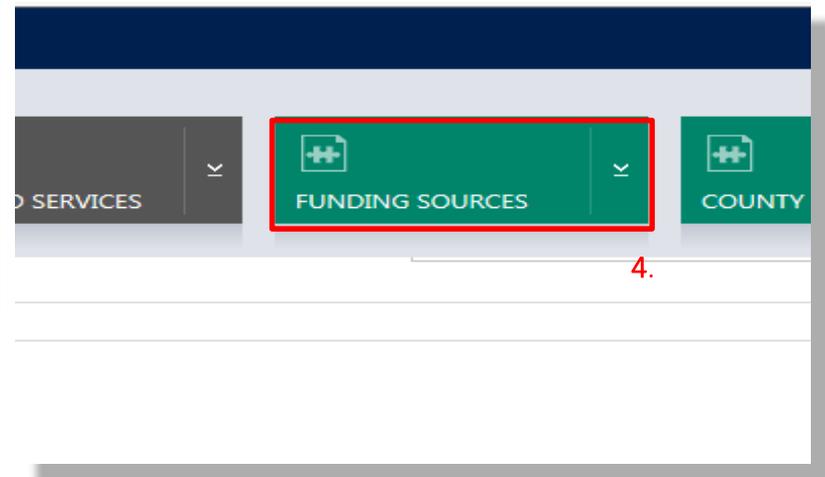
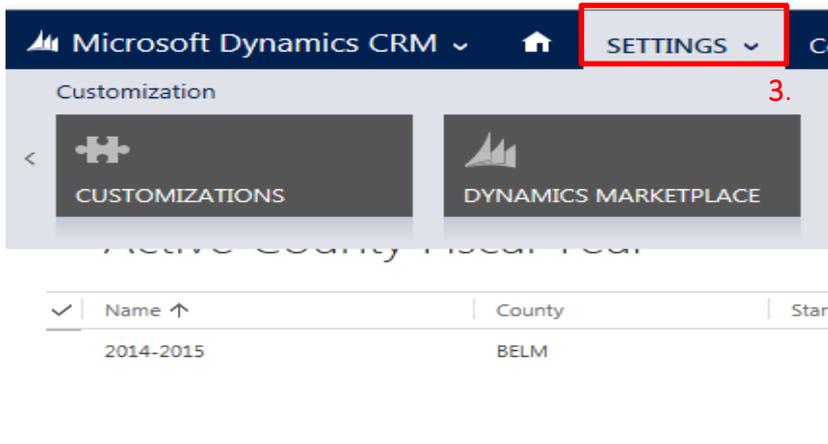
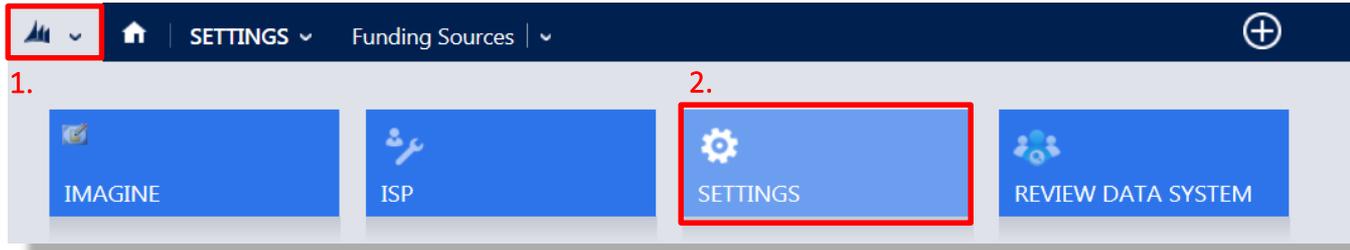
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Questions

Create a County Fund Source



Create a County Fund Source

SETTINGS Funding Sources New Funding Source

SAVE SAVE & CLOSE NEW

3. 1.

FUNDING SOURCE : INFORMATION

New Funding Source

General 2.

County*	HARR		
Fund Source Name*	Columbus Charity Newsies	FS Code	TEST-FUND-001-002
Fund Source Group ↓	Local		

Fund Source Group options:
Local: To track local funds;
Wavier DD: To track waiver matching

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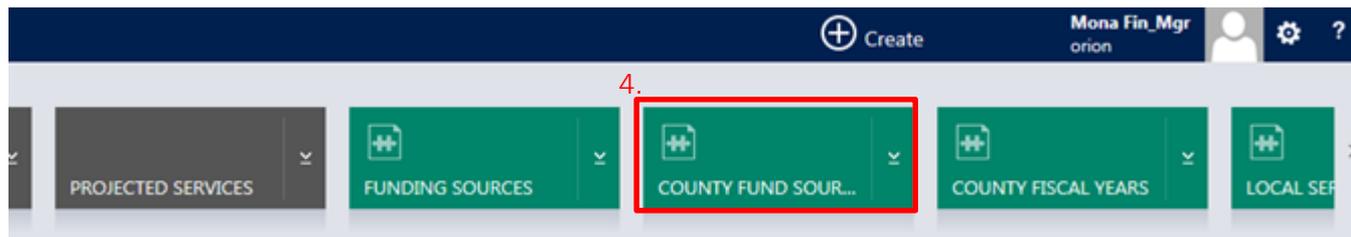
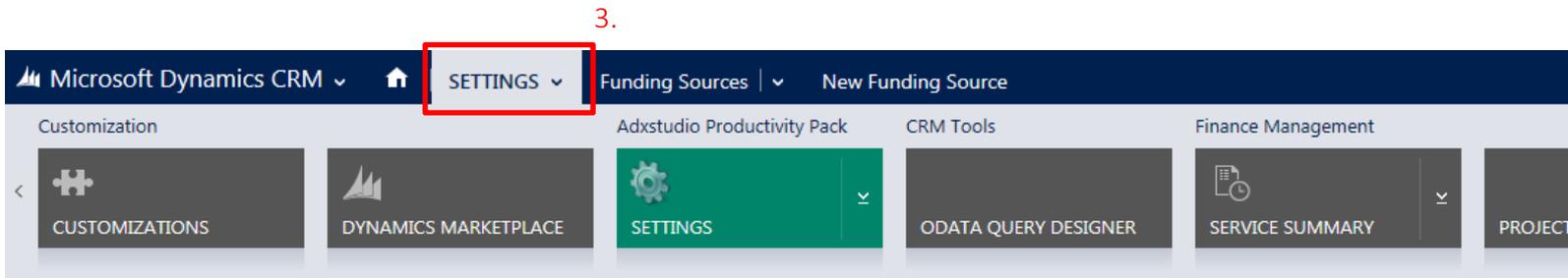
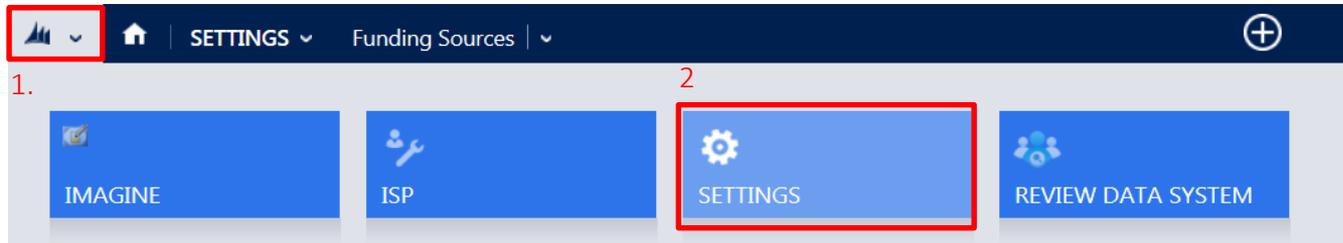
Associate a Service with Providers

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Review Remaining Balance on County Fund Source Allocations

Questions

Create a County Fund Source Allocation



Create a County Fund Source Allocation

1.

2.

3.

County Fund Source/Allocation : INFORMATION

New County Fund Source/Allocation

General

County *	HARR	Funding Source *	FS local kal 2015
County Fiscal Year *	2015	County Number	29
CFSA Start Date	5/1/2015	Assigned Finance Manager	julie gentle
CFSA End Date	6/30/2015	Account Number/GL Code	1234-1234-1234-1234
CFS Code	--		
Owner *	FMDalmations Dog		

Total Committed --

All Services

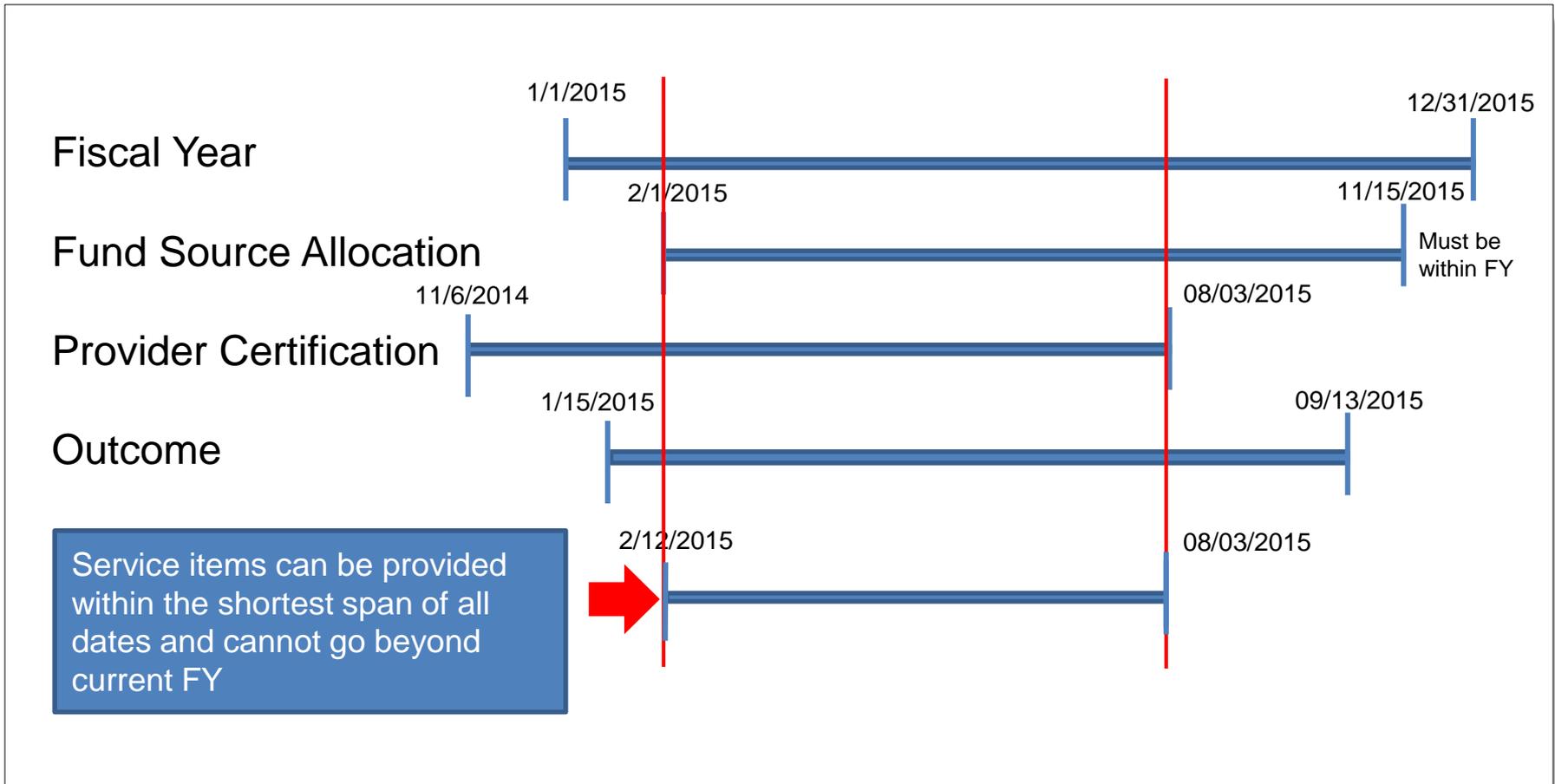
Status **Active**

Active

Allocations cannot be used if they have a date range that reaches beyond the fiscal year. If this is the case, split the allocation into two.

- 1 – The first ends at the fiscal year end
- 2 – The second starts the new year

Overview (Critical Date Ranges)



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Create a New Provider

The image displays two screenshots of the Microsoft Dynamics CRM interface, illustrating the steps to create a new provider.

Step 1: The top navigation bar shows the user is logged in as Sultan FMAgrabah (username: imagine). The 'IMAGINE' dropdown menu is highlighted with a red box and the number '1'.

Step 2: The main dashboard area shows four blue buttons: 'IMAGINE', 'ISP', 'SETTINGS', and 'REVIEW DATA SYSTEM'. The 'IMAGINE' button is highlighted with a red box and the number '2'.

Step 3: The 'IMAGINE' dropdown menu is expanded, showing a list of options under 'My Work' and 'Listings'. The 'IMAGINE' dropdown menu is highlighted with a red box and the number '3'.

Step 4: The 'PROVIDERS' option is highlighted with a red box and the number '4'.

Create a New Provider

Microsoft Dynamics CRM | IMAGINE | Providers | New Provider | Create | Sultan FM imagine

SAVE | SAVE & CLOSE | + NEW

3. 1.

PROVIDER : INFORMATION

New Provider

General

Company Name *	HSP - Hospice	Certification Start Date	6/26/2015
Provider/Vendor Type *	Local Provider	Certification End Date	--
Provider Type *	Agency		
Operates LF/DC	--	Last Compliance Review	--
Contract #	--		
Setup Complete	Yes		
Status	Active		

CEO Information

CEO First Name	Don	CEO Last Name	Krisp
CEO Email Address	DKrisp@hotmail.com		
One Time Pin	--		

Provider Agent Information

First Name	CEO-First-Name	Last Name	CEO-Last-Name
Email	CEO.Provider@hotmail.com		
Street 2	--	State/Province	--

2.

Inviting Local Provider to *imaginels*

The image consists of three screenshots from the Microsoft Dynamics CRM interface, illustrating the process of inviting a local provider. Red boxes and numbers highlight key steps:

- Step 1:** The top navigation bar shows the 'Microsoft Dynamics CRM' dropdown menu highlighted with a red box and the number '1'.
- Step 2:** The main dashboard area shows the 'IMAGINE' tile highlighted with a red box and the number '2'. Other tiles include 'ISP', 'SETTINGS', and 'REVIEW DATA SYSTEM'.
- Step 3:** The 'IMAGINE' dropdown menu is expanded, showing a list of options. The 'PROVIDERS' option is highlighted with a red box and the number '4'. The number '3' is placed above the dropdown menu.
- Step 4:** A detailed view of a provider named 'AAAA BIG CAR TRAVEL' is shown. The 'Send Portal Invitation' option in the context menu is highlighted with a red box and the number '2'. The number '1' is placed above the context menu icon.

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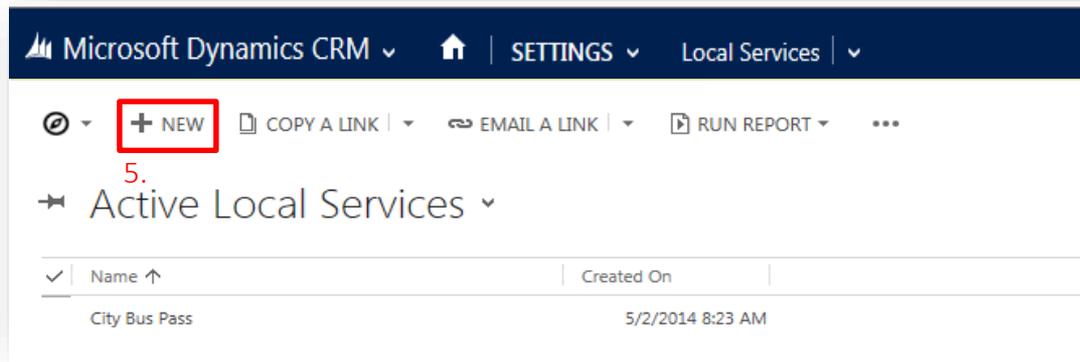
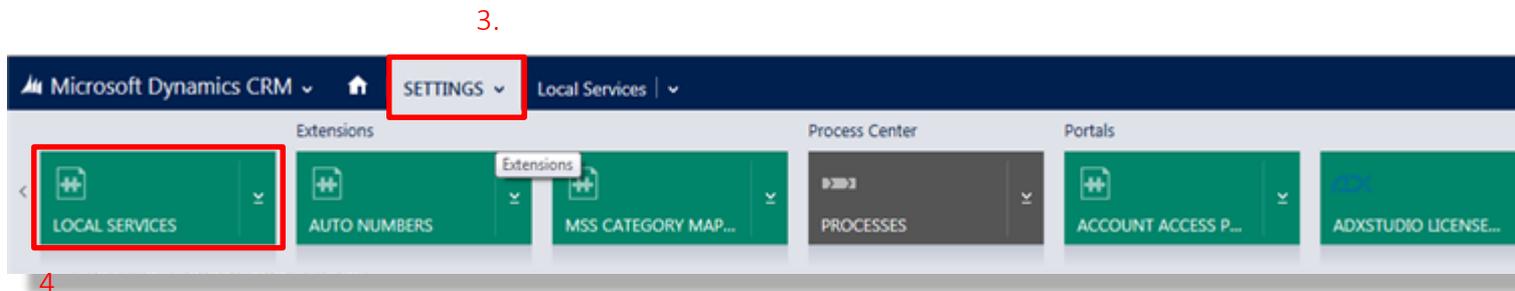
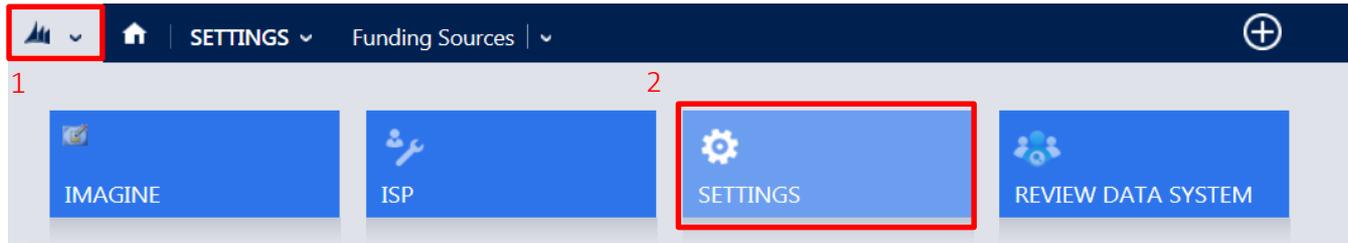
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Create a Local Service Price List



Create a Local Service Price List (County Rate)

SETTINGS | Local Services | New Local Services

SAVE SAVE & CLOSE + NEW

LOCAL SERVICES : INFORMATION

New Local Services

Rate Start Date* 5/8/2015 | Rate End Date+ -- | County P Harrison

Local Services Detail

Service Code*	IM002	County*	Harrison
Service Category*	Creative Supports	Sub-Category*	Business Dev - Training, Coaching, Mentoring
Rate Type*	County	Rate Amount*	\$27.00
Unit of Measure*	Hours	Rate Effective End Date+	--
Rate Effective Start Date*	5/8/2015		

A provider rate will be created after saving this record.

NOTE: The Rate Effective Start Date can be no sooner than the day after record creation.

Create a Local Service Price List (Service Codes)

Microsoft Dynamics CRM | SETTINGS | Local Services | New Local Services

SAVE SAVE & CLOSE + NEW

LOCAL SERVICES : INFORMATION

New Local Services

Service Codes contains unique combination of Category and Sub Category

Local Services Detail

Service Code *	IM001	County *
Service Category *	IM002	Sub-Category *
Rate Type *	IM003	Rate Amount *
Unit of Measure *	IM004	
Rate Effective Start Date *	IM005	Rate Effective End Date *

For a complete list of service codes, please refer to the 'Service Listing Codes' section in the FM Guide

Create a Local Service Price List (Provider Rate)

The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', 'SETTINGS', 'Local Services', and 'Business Dev - Train...'. Below the navigation bar, the ribbon contains 'SAVE', 'SAVE & CLOSE', '+ NEW', and 'DEACTIVATE'. A red box labeled '1.' highlights the 'More' button (three dots) in the ribbon. A context menu is open, showing options: 'Assign', 'Create Provider Service', 'Run Workflow', 'Start Dialog', 'Run Report', and 'Other Activities'. A red box labeled '2.' highlights the 'Create Provider Service' option. A tooltip for 'Create Provider Service' is visible, containing the text: 'Copy this service for assignment to a specific provider in the same county'. The main content area shows 'LOCAL SERVICES : INFORMATION' for 'Business Dev - Training, C...'. Below this, the 'Local Services Detail' section lists the following fields:

Service Code *	IM002
Service Category *	Creative Supports
Rate Type *	County
Unit of Measure *	Hours
Rate Effective Start Date *	5/8/2014

Create a Local Service Price List (Provider Rate)

Local Provider can be added at this step, but it is not recommended

LOCAL SERVICES : INFORMATION

New Local Services

Rate Start Date*
6/18/2015

Local Services Detail

Service Code*	IM001	County*	Harrison
Service Category*	Community Memberships & Activity Expense Assistance	Sub-Category*	Recreation/Leisure
Rate Type*	Provider	Rate Amount*	\$200.00
Provider*	--	Unit of Measure*	Day
Rate Effective Start Date*	6/18/2015	Rate Effective End Date*	--

Create a Local Service Price List (Provider Rate)

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM', a home icon, 'SETTINGS', and 'Local Services'. Below this is a toolbar with icons for 'NEW', 'COPY A LINK', 'EMAIL A LINK', and 'RUN REPORT'. The main content area is titled 'Active Local Services'. Below the title is a table with two columns: 'Name' and 'Created On'. The table contains two entries, both of which are highlighted with a red border. The first entry is 'Business Dev - Training, Coaching, Mentoring' with a creation time of '5/7/2014 4:12 PM'. The second entry is 'Business Dev - Training, Coaching, Mentoring-Test Provider #1 Iteration 13c' with a creation time of '5/7/2014 4:34 PM'. A red bracket is drawn under the text 'Test Provider #1 Iteration 13c' in the second entry.

Name	Created On
Business Dev - Training, Coaching, Mentoring	5/7/2014 4:12 PM
Business Dev - Training, Coaching, Mentoring-Test Provider #1 Iteration 13c	5/7/2014 4:34 PM

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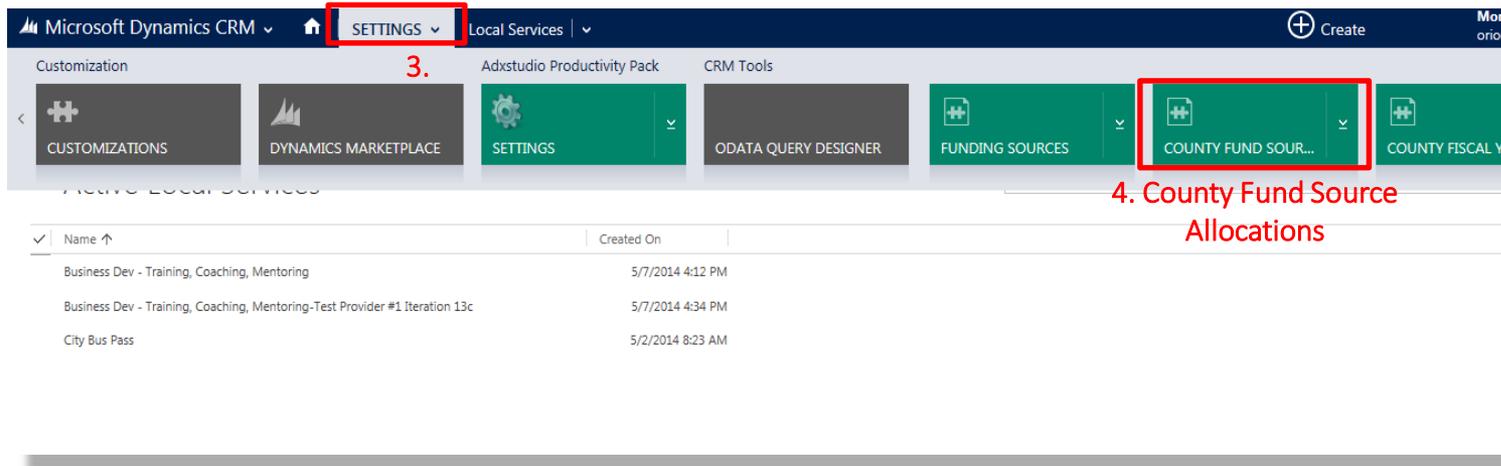
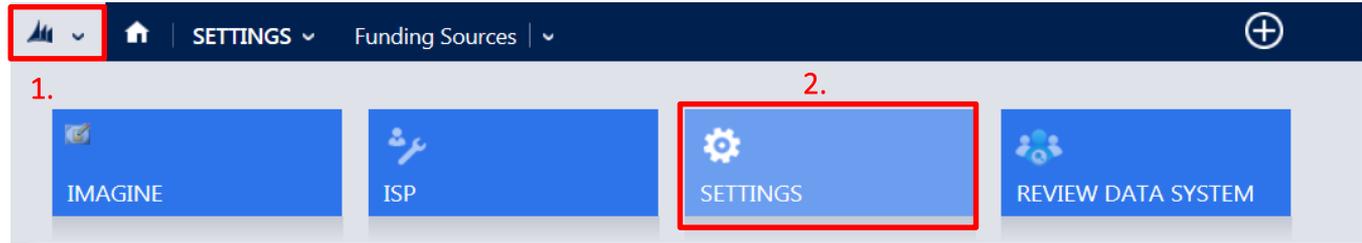
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Associate a Local Provider Service to a Fund Source Allocation



Associate a Local Service Price List to a Fund Source Allocation

| **SETTINGS** | County Fund Sourc... |
Sultan FMAgrabah
imagine

| + NEW | COPY A LINK | EMAIL A LINK | RUN WORKFLOW | ...

→ Active County Fund Source Alloca... Search for records

✓	Name	CFS Code	Funding Source	County	Count...	County Fiscal Year	Total Committed ↑	Accour ↓
	HARR - 1/1/2015 - 12/31/2015 - Levy		Levy	HARR		2015		
	HARR - 6/16/2015 - 6/18/2015 - MD...		MDG Funding Source - Levy	HARR		EG - FY	\$5,000.00	
✓	HARR - 6/9/2015 - 6/12/2015 - EAG...	12345	EAG Fund Source	HARR	54321	2015	\$25,000.00	100100291
				HARR	32		\$1,000,000.00	
			al 2015	HARR	32		\$1,000,000.00	

1. Click to open the Fund Source Allocation

Associate a Local Provider Service to a Fund Source Allocation

Microsoft Dynamics CRM | SETTINGS | County Fund Sourc... | HARR - 6/1/2015 -... | Create | Little FMJohn imagine

SAVE | SAVE & CLOSE | NEW | EMAIL A LINK

COUNTY FUND SOURCE/ALLOCATION : INFORMATION
HARR - 6/1/2015 - 5/31/2016 - MDG Funding Source - Levy

Board Responsibility Settings

Board Approves	--	SSA Coordinates	--
Board Pays	--	SSA Monitors	--
CB Pay %	--	SSA CM Billable	--

Associated Services

**Scroll 1
Down to
Associated
Services**

Name ↑	County	Provider	Rate Type	Rate Amount
City Bus Pass-ABC MEDICAL SUPPLY	Harrison	ABC MEDICAL SUPPLY	County	\$200.00

+

2

Status: **Active**

Active

Associate a Local Provider Service to a Fund Source Allocation

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'SETTINGS', 'County Fund Sour...', and 'HARR - 6/1/2015'. The user is identified as 'Little FMJohn imagine'. Below the navigation bar, there are action buttons: 'SAVE', 'SAVE & CLOSE', '+ NEW', and 'EMAIL A LINK'. The main content area is titled 'COUNTY FUND SOURCE/ALLOCATION : INFORMATION' and displays a list of records. A blue callout box with the text 'Find the Service and Select it.' is overlaid on the list. The list contains the following records:

Service	Allocation
Adult Foster Care Harrison	PorkyPig
Business Dev - Training, Coaching, Mentoring Harrison	
Business Dev - Training, Coaching, Mentoring Harrison	
Business Dev - Training, Coaching, Mentoring-Atwood Homes Harrison	Atwood Homes
Business Dev - Training, Coaching, Mentoring-Atwood Homes Harrison	Atwood Homes
Business Dev - Training, Coaching, Mentoring-CKTestCEO2 Harrison	CKTestCEO2
Business Dev - Training, Coaching, Mentoring-CKTestCEO2 Harrison	CKTestCEO2

At the bottom of the list, it shows '10 results' and a '+ New' button. Below the list, there is a 'Status' field set to 'Active'.

Note: The fund source allocation will be available for service when:

- Service(s) have been associated to a fund source allocation
- The budget support specialist does costing for the service

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Assigning a Local Service to You (FM)

The purpose for this assignment is so that the Local Service assignee will receive the workflow notification when the BSS completes costing.

1

2

3

4

The screenshot shows the Microsoft Dynamics CRM navigation pane. The path is: Microsoft Dynamics CRM > SETTINGS > LOCAL SERVICES. Red boxes and numbers 1 through 4 highlight the steps: 1. Microsoft Dynamics CRM, 2. SETTINGS, 3. LOCAL SERVICES, and 4. LOCAL SERVICES (selected).

Select the Service from the list

4

The screenshot shows the 'Active Local Services' list in Microsoft Dynamics CRM. The list is highlighted with a red box and the number 4. The list contains the following data:

Name	County	Provider	Rate Type	Rate Amount
Adult Foster Care	Harrison	PorkyPig	County	\$25.00
Business Dev - Training, Coaching, Mentoring	Harrison		County	\$100.00
Business Dev - Training, Coaching, Mentoring	Harrison		County	\$100.00
Business Dev - Training, Coaching, Mentoring-Atwood Ho...	Harrison	Atwood Homes	County	\$100.00
Business Dev - Training, Coaching, Mentoring-Atwood Ho...	Harrison	Atwood Homes	County	\$250.00
Business Dev - Training, Coaching, Mentoring-CKTestCEO2	Harrison	CKTestCEO2	County	\$100.00

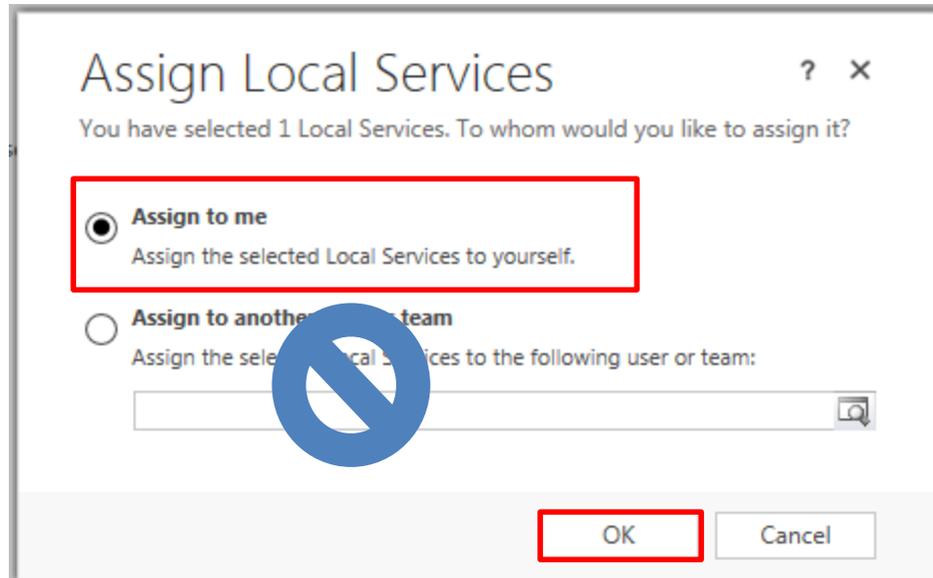
Assigning a Local Service to You (FM)

The screenshot displays the Microsoft Dynamics CRM interface for a Local Service record. The breadcrumb trail at the top reads: Microsoft Dynamics CRM > SETTINGS > Local Services > Fitness & Aquatic C... The main header area shows 'LOCAL SERVICES : INFORMATION' and the title 'Fitness & Aquatic Centers'. Below this is the 'Local Services Detail' section, which contains a list of fields and their values:

Service Code*	IM001	County*
Service Category*	Community Memberships & Activity Expense Assistance	Sub-Category*
Rate Type*	Provider	Rate Amount*
Provider	<u>ABC MEDICAL SUPPLY</u>	Unit of Measure*
Rate Effective Start Date*	6/9/2015	Rate Effective End D.

A dropdown menu is open over the record, showing the following options: Assign (highlighted with a red box), Run Workflow, Start Dialog, Run Report, and Other Activities.

Assigning a Local Service to You (FM)



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Associating Services with Providers

The image consists of two screenshots of the Microsoft Dynamics CRM interface, illustrating the steps to reach the 'LOCAL SERVICES' page.

Top Screenshot: Shows the main navigation bar. The 'Microsoft Dynamics CRM' logo is highlighted with a red box and labeled '1'. Below the navigation bar, the 'SETTINGS' tile is highlighted with a red box and labeled '2'. Other tiles include 'IMAGINE', 'ISP', and 'REVIEW DATA SYSTEM'. The top right shows the user 'Sultan FMAgrabah imagine' and a 'Create' button.

Bottom Screenshot: Shows the 'SETTINGS' page. The 'SETTINGS' dropdown menu is highlighted with a red box and labeled '3'. The page is divided into 'Finance Management' and 'Extensions' sections. In the 'Extensions' section, the 'LOCAL SERVICES' tile is highlighted with a red box and labeled '4'. Other tiles in 'Finance Management' include 'SERVICE SUMMARY', 'PROJECTED SERVICES', 'FUNDING SOURCES', 'COUNTY FUND SOUR...', and 'COUNTY FISCAL YEARS'. Other tiles in 'Extensions' include 'MSS CATEGORY M'.

Associating Services with Providers

Microsoft Dynamics CRM | SETTINGS | Local Services | Create | Little FMJohn imagine

+ NEW | COPY A LINK | EMAIL A LINK | RUN REPORT

Active Local Services | Search for records

Name	County	Provider	Rate Type	Rate Amount
Fitness & Aquatic Centers (YMCA, etc.)-ABC MEDICAL SU...	Harrison	ABC MEDICAL SUPPLY	Provider	\$55.00
Local Microenterprise Grant-New Provider fot testing	Harrison	New Provider fot testing	Provider	\$250.00
Community Respite-ABC MEDICAL SUPPLY	Harrison	ABC MEDICAL SUPPLY	Provider	\$125.00

Charts

Microsoft Dynamics CRM | SETTINGS | Local Services | Local Microenterpri... | Create

Common | Local Microenterprise Grant-New Provider fot testing | Process S

ACTIVITIES | CLOSED ACTIVITIES | CONNECTIONS | AUDIT HISTORY | LOCAL SERVICE | BACKG

1 | 2

Associating Services with Providers

Microsoft Dynamics CRM | SETTINGS | Local Services | Local Microenterpri... | Create | Sultan FM. imagine

LOCAL SERVICES : INFORMATION

Local Microenterprise Grant-New Pro... | Rate Start Date* 6/17/2015 | Rate End Date+ --

Provider Services Associated View

+ ADD NEW PROVIDER SER... | ADD EXISTING PROVIDER... | CHART PANE | RUN REPORT | ...

imagine Service Code	Category ↑	Sub-Category/Name ↑	Product Service Code	Provider
IM002	Creative Supports	Local Microenterprise...		New Provider...

Associating Services with Providers

ISP | Provider Services | New Provider Service

Sultan FMAgrabah
imagine

SAVE SAVE & CLOSE + NEW

PROVIDER SERVICE : INFORMATION
New Provider Service

General

Imagine Service Code *	Provider
⊗ --	--
Service Type	Unit Group *
Local	--
Rate Type	Default Unit *
--	--
Category	Rate Effective Start Date
--	--
Sub-Category/Name	Rate Effective End Date
--	--

Description

--

Active

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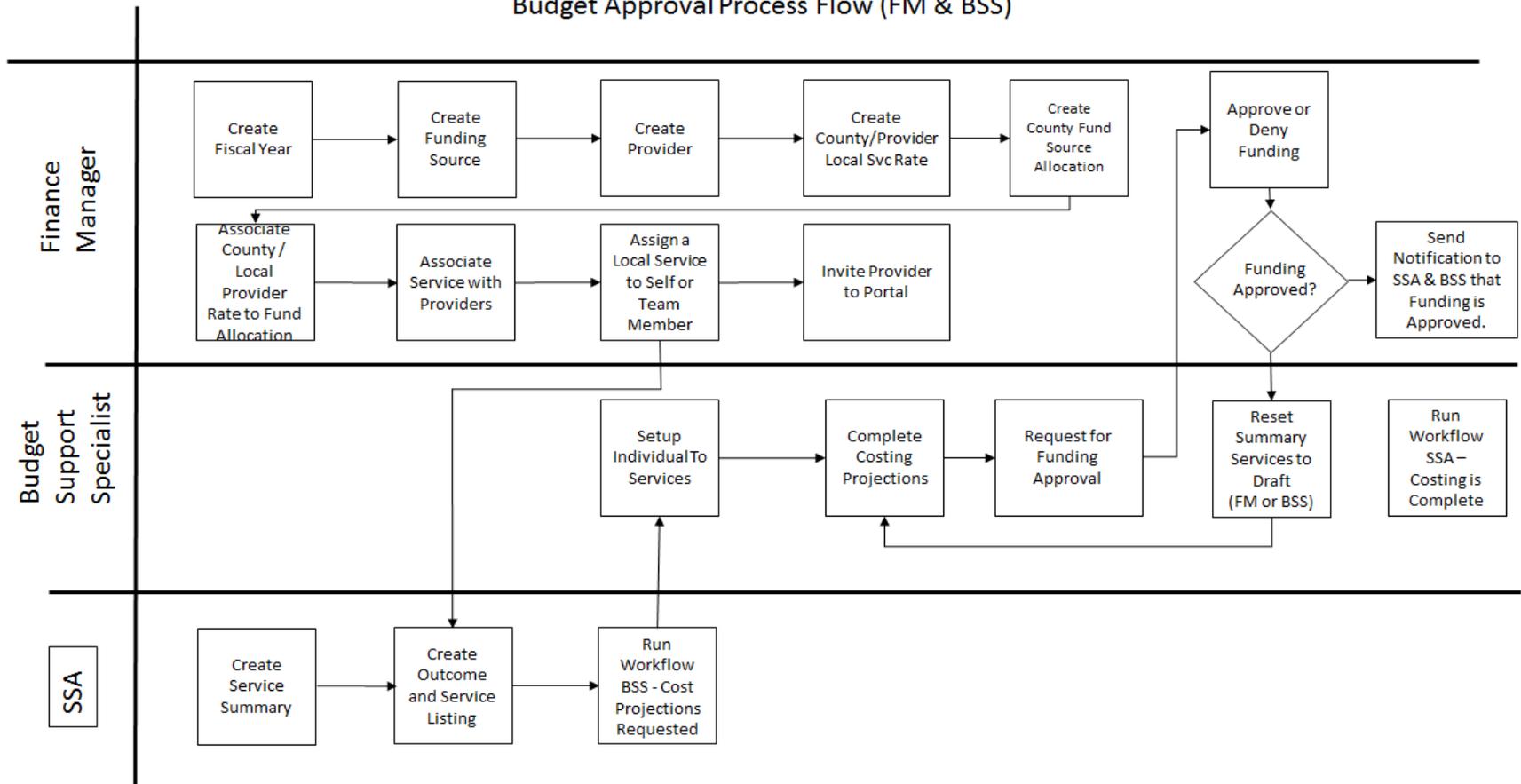
Approve/Deny a Funding Request

Review Remaining Balance on County Fund Source Allocations

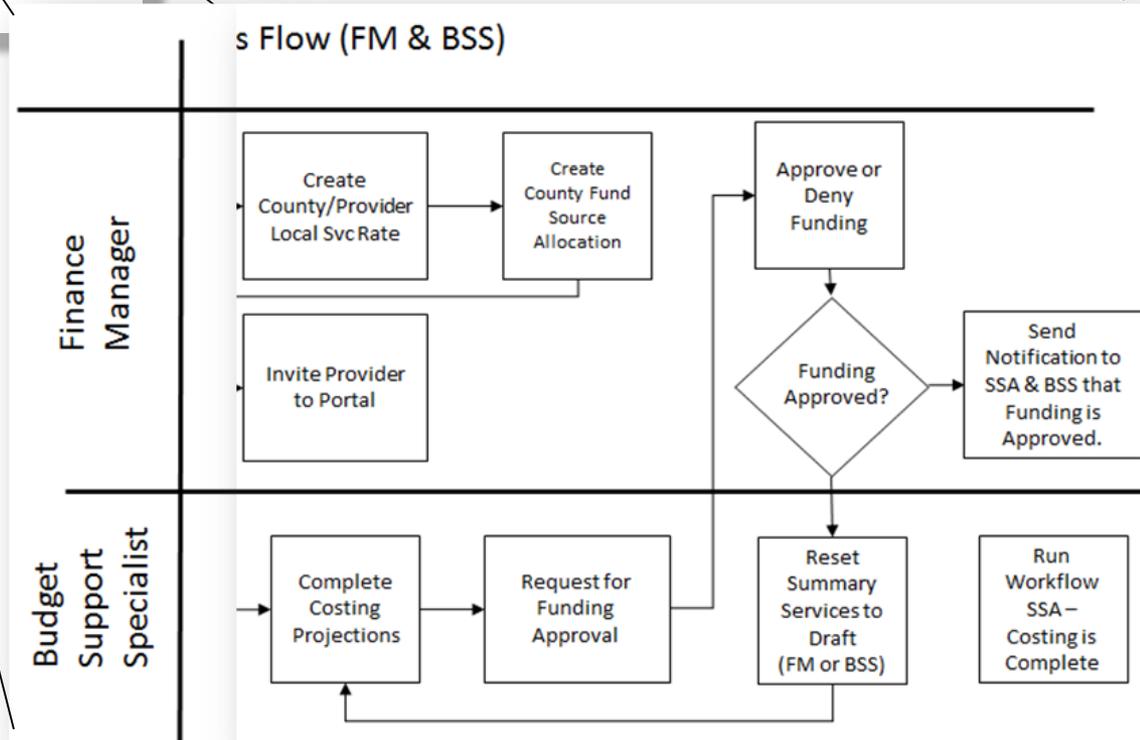
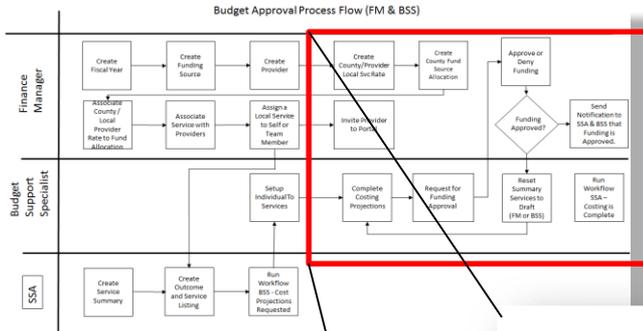
Questions

Approve/Deny Funding Request

Budget Approval Process Flow (FM & BSS)



Approve/Deny Funding Request



Approve/Deny Funding Request

Microsoft Dynamics CRM | HOME | IMAGINE | Dashboards

SAVE AS | NEW | REFRESH ALL | ADVANCED FIND

Financial Approval Dashboard

My Funding Requests

My Service Summaries Pending Approval - Finance 1

Individual	Name	Status Reason ↑	Total Amount	Individual's Budget Start...	Individual's Budget End D...
AKEEN Vukovi...	Service Summary - 2/1/2015 - 12/31/2015 - AKEEN...	Pending Appr...	\$131.25	2/1/2015	12/31/2015

2

Approve/Deny Funding Request

Microsoft Dynamics CRM | ISP | Service Summaries | Service Summary - ...

REVISIONS: REVISE, PRINT SERVICE SUMMARY..., DENY REQUEST, APPROVE REQUEST

SERVICE SUMMARY : INFORMATION

Service Summary - 2/1/2015 - 12/31/...

General

Service Summary

Current As Of	7/16/2015	Quote ID *
Name *	Service Summary - 2/1/2015 - 12/31/2015 - AKEEN Vukovich	Revision ID *
Total Amount	\$131.25	Assigned Finance Manager *
Status Reason	Pending Approval (Active)	Budget Support Specialist *
Individual's Local Services Budget Amount	\$25,000.00	Remaining Local Services Budget Amount
Price List	Harrison County Price List	

Individual Budget Year

Individual's Budget Start Date	2/1/2015	Individual's Budget End Date
Individual Budget Year State	Current	

Services with Financial Information

Projected_services

Individual ↑	Category ↑	Sub-Category	Provider	Start Date	End Date	Funding Source...	Item Description	How Much
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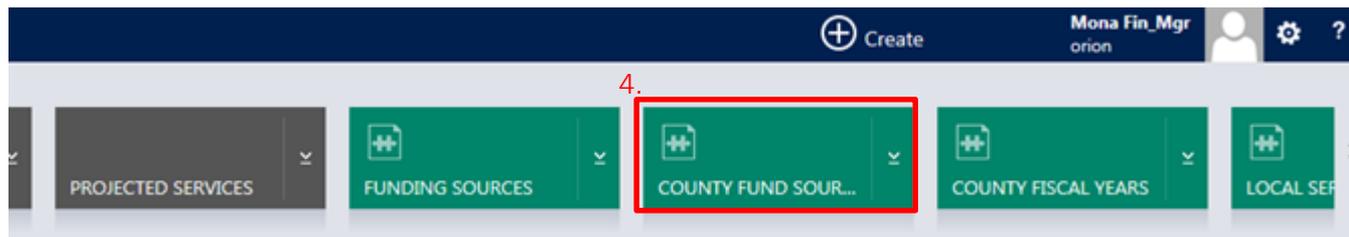
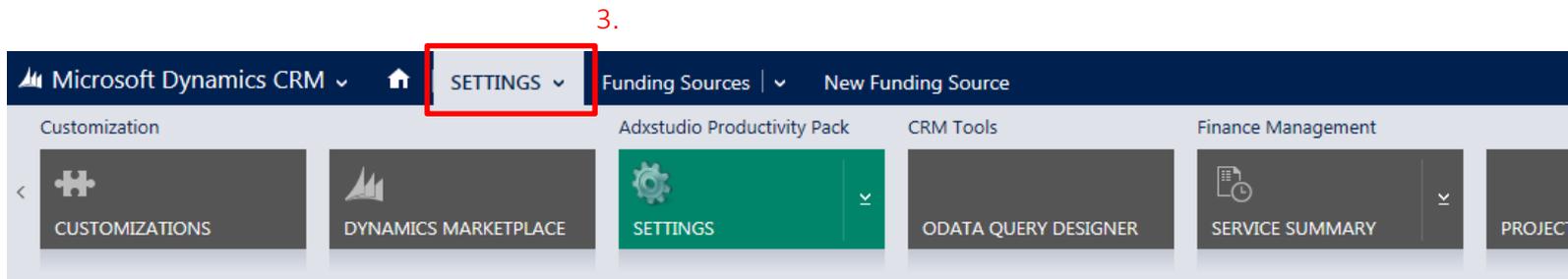
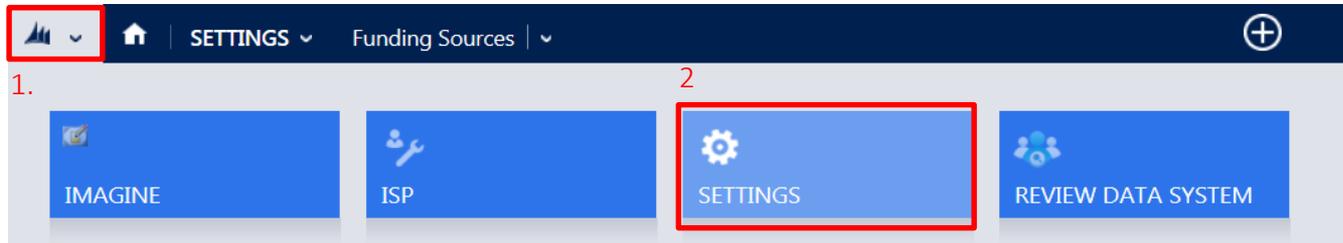
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Questions

Review Remaining Balance on CFSA



Review Remaining Balance on CFSA

SETTINGS County Fund Sourc... Little FMJohn imagine

+ NEW COPY A LINK EMAIL A LINK RUN WORKFLOW

Active County Fund Source Alloca... Search for records

Name	CFS Code	Funding Source	County	Count...	County Fiscal Year	Total Committed	Accour
HARR - 7/6/2015 - 10/8/2015 - Levy		Levy	HARR	12345	EG - FY		123-12311-65
HARR - 7/14/2015 - 8/31/2015 - San...		Sandusky_Community_Funding	HARR		Sandusky_2015		
HARR - 6/1/2015 - 5/31/2016 - MDG...		MDG Funding Source - Levy	HARR		EG - FY		
HARR - 7/8/2015 - 11/11/2015 - UA...		UA Acme Tennis	HARR	33	2015-2016		4567-4567-45
HARR - 6/16/2015 - 6/18/2015 - MD...		MDG Funding Source - Levy	HARR		EG - FY	\$5,000.00	
HARR - 6/9/2015 - 6/12/2015 - EAG...	12345	EAG Fund Source	HARR	54321	2015	\$25,000.00	100100291
<input checked="" type="checkbox"/> HARR - 1/1/2015 - 12/31/2015 - Levy		<u>Levy</u>	HARR		<u>2015</u>	\$50,000.00	
HARR - 7/1/2016 - 6/23/2017 - Charl...	CFS-123456789	Charles' Go-Fund-Me	HARR	23454...	Charles' Fiscal Year	\$250,000.00	H-987654321
HARR - 1/30/2015 - 12/31/2015 - FS...	sdgtest	FS- Kal	HARR	32	EG - FY	\$500,000.00	
HARR - 1/1/2015 - 12/31/2015 - FS l...	CFSKAL	FS local kal 2015	HARR	32		\$1,000,000.00	

1 - 10 of 10 (1 selected) Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Select

Review Remaining Balance on CFSA

SETTINGS County Fund Sour... HARR - 1/1/2015 - ... Little FMJohn imagine

SAVE SAVE & CLOSE + NEW EMAIL A LINK

COUNTY FUND SOURCE/ALLOCATION : INFORMATION
HARR - 1/1/2015 - 12/31/2015 - Levy

All Services ← Scroll Down To 'All Services'

Individual ↑	Category ↑	Sub-Category	Provider	Start Date	End Date	Item Description	How Much	Units for Planni...	How Often
AKEEN Vukovi...	Transportation	Transportatio...	Licking Count...	7/7/2015	7/28/2015	Check Mirror...	3	Miles	Weekly
AKEEN Vukovi...	Transportation	City Bus Pass	ABC MEDICAL...	7/13/2015	7/17/2015	Learn where t...	3	Each	One Time

Learn where to buy a bus pass

Total Allocated	\$131.25	Total Remaining	\$49,868.75
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Total Allocated \$131.25 Total Remaining \$49,868.75

Status Active

Active

Questions ??