

Uploading, Reviewing, and Approving Documents On the *imaginIS* Provider Portal

This guide describes the process for a Portal user to upload a document into *imaginIS* for the SSA to review, approve and place into a Documents Folder.

Step 1. From the Portal, select the Individual.

Assigned Caseload for Hale, Anthony							
Connected Individuals Search: <input type="text"/>							
Individual	Picture	Medicaid #	DoDD #	Reporting County	DOB	Assigned SSA	List Of Contacts
Alexander Smith		#####1111	6645138	Belmont	1/7/1990	Donna Noble	Contacts
Bella Webster			9983628	Harrison	3/31/2001	Donna Noble	Contacts

Step 2. From the Individual’s Front Page, select the Documents tile.

Alexander Smith (Alex) (i)

Donna Noble

Profile
Pictures
Documents
Alerts
Notifications
Discovery
Action Plan
Outcomes
LearningLog
ISP
Agreements

Reports
Circle of Support

Step 3. On the “Pinned Documents” submenu, Click on the “+”.

Pinned Documents

Uncategorized Documents
click to open 1

+

Step 4. When the dialog box opens, Click on the “Browse” button to browse your computer for the file you want to upload. From the “Choose File to Upload” dialog box, select the file, and Click on the “Open” button.

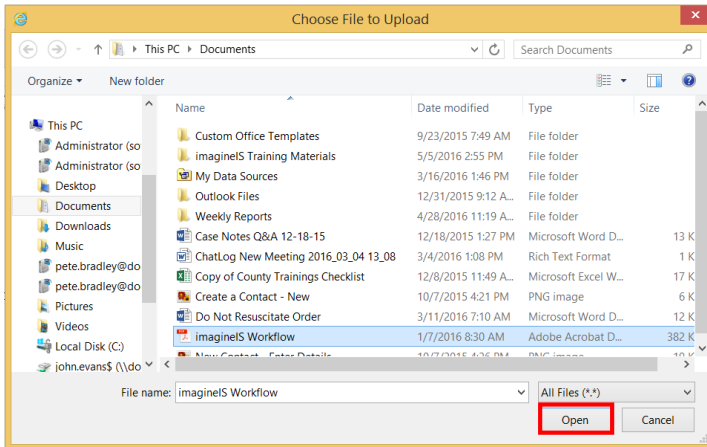
Title:

Urgent

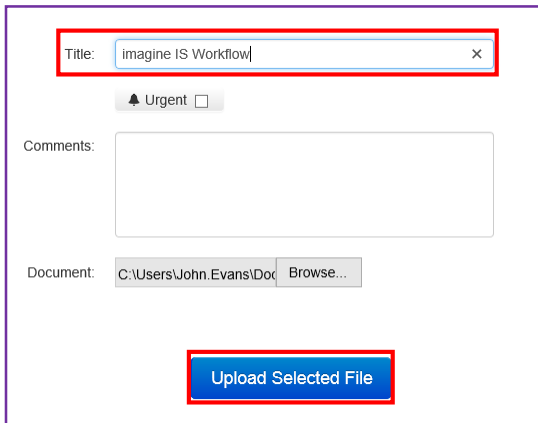
Comments:

Document: Browse...

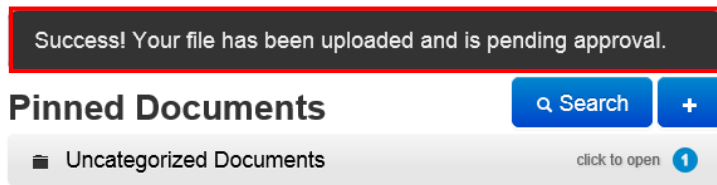
Upload Selected File



Step 5. When the file has been selected, enter a “Title” for the document. Then, Click on the “Upload Selected File” button. You do not have the option in the Portal to select the Document Folder for the selected file. The SSA will do that once they have reviewed and approved the file.



When the “Success! Your file has been uploaded and is pending approval.” Dialog Box is displayed, your file has been sent to the CRM.



Step 6. A Notification will come onto the SSA’s Case View Dashboard, informing the SSA that a document has been uploaded for an Individual from the Portal. Click on the Individual’s name to open their Front Page.

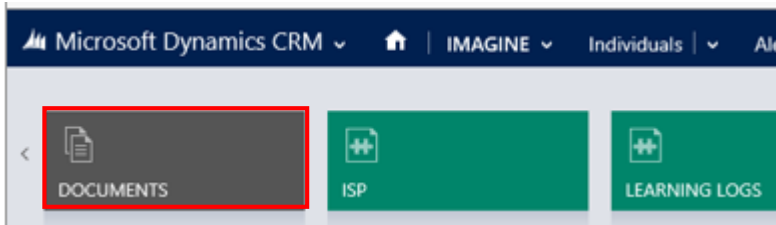
SSA Caseload View ▾

My Notifications ▾

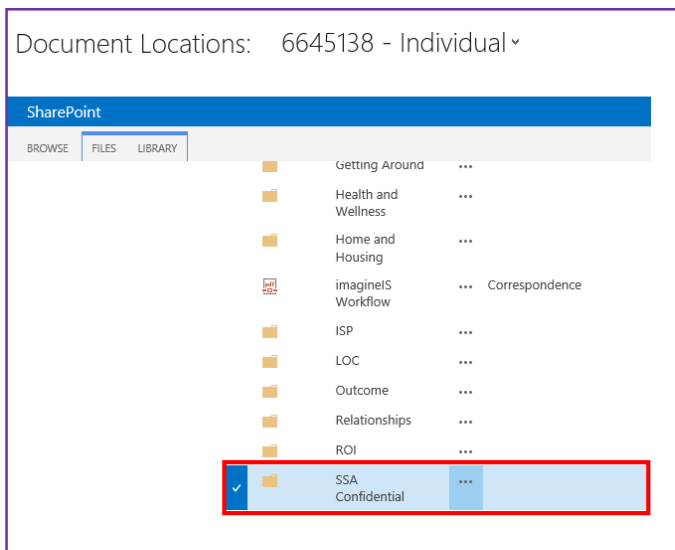
Search for records

Priority	Subject ↑	Regarding	Individual	Assigned SSA	Contact	Date Created ↑
Green	New Document Added	Alexander Smith	Alexander Sm...	Donna Noble		5/6/2016 12:0...

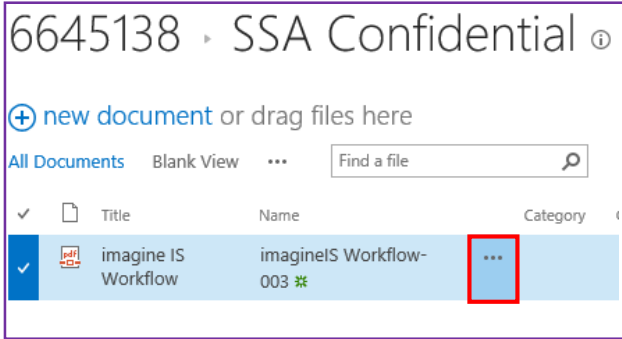
Step 7. From the Individual’s Front Page, select the “Documents” tile.



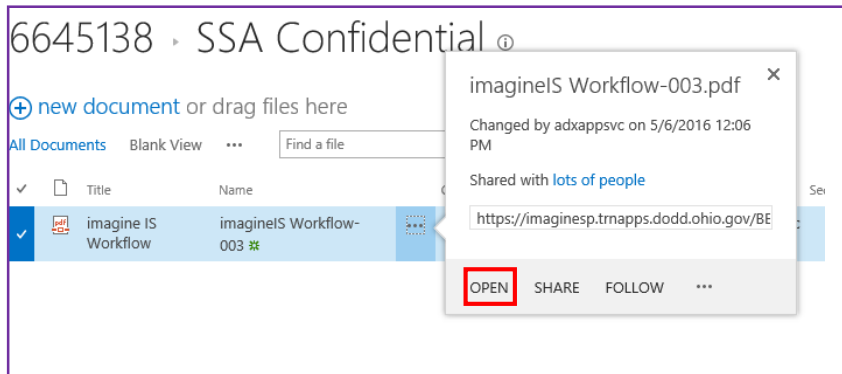
Step 8. All uploaded documents are automatically placed into the “SSA Confidential” folder for the SSA to review. While in this folder, the documents are only visible to the County Board and not viewable from the Portal. Once the Documents SharePoint folders are displayed, scroll down to the “SSA Confidential” folder and open it.



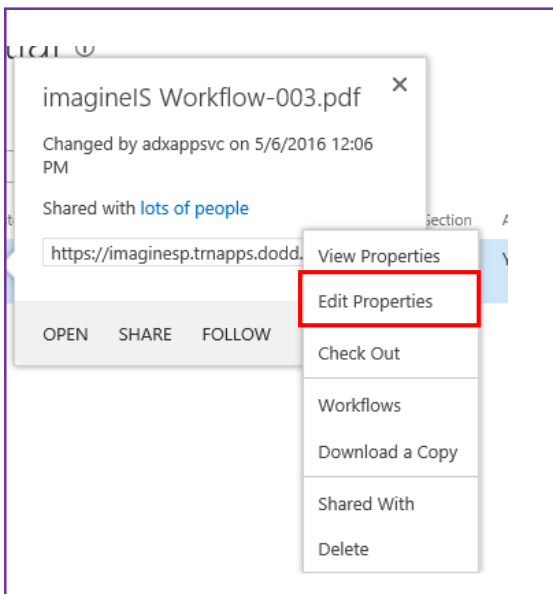
Step 9. Once the folder is open, Click on the three ellipses (...) next to the file name.



Step 10. When the File pop up box opens, Click on “Open” in the pop up box to open the file.



Step 11. Once you have opened and reviewed the file, close it. Click on the three ellipses (...) next to the file name again. Select “Edit Properties” from the drop down menu.



Step 12. When the Dialog Box opens, enter any “Comments”, select the “Section” (this is the Folder the file will be moved to) and “Category” for the file from the drop downs. (Note: If the Category you select is not a predetermined folder, the file will be placed in the main uncategorized folder.) Check the boxes to “Pin” the document and “Approve” it. Click “Save”.

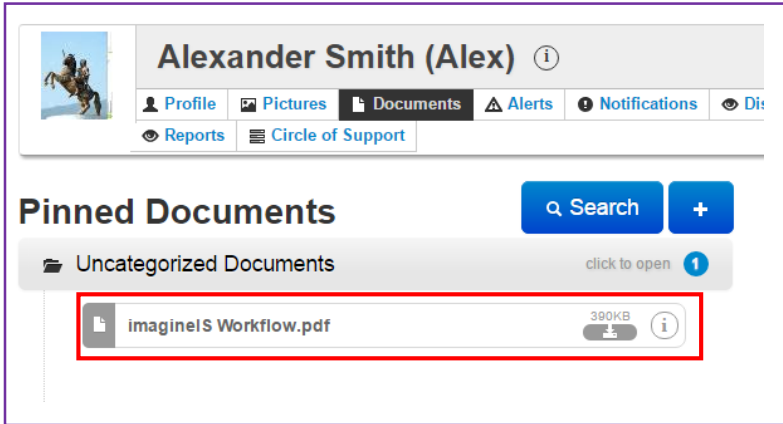
Step 13. Return to the Individual’s Front Page and select the “Documents” tile. Once the Documents SharePoint folders are displayed, scroll down to the File Folder you moved the file into and open it.

Title	Name	Category	Comments	SSA Confidential
Action Plan				

Step 14. The file will be displayed in the appropriate folder and now will be viewable from the Portal.

Title	Name	Category	Comments	SSA Confidential	Created By	Section	Approved	Uploaded By	Category	Pin	Primary Verific
Workflow	imagineIS Workflow-002	Plan Signature Page		No	admappsvc	Action Plan	Yes	Manager, Program	Plan Signature Page	Yes	No
imagine IS Workflow	imagineIS Workflow-003	Misc. Report		No	admappsvc	Action Plan	Yes	Manager, Program	Misc. Report	Yes	No

Step 15. From the Portal, open the Individual’s file, and from the Front Page select the “Documents” tile. If the file was not moved to a specific file folder by the SSA, it will be located in the “Uncategorized Documents” folder.



Step 16. If the file was moved to a specific file folder by the SSA, it will be located in that folder.

