



## Customer Eligibility Specialist

### Description

The Customer Eligibility Specialist training will instruct county board members that are responsible for adding new individuals into *imagineIS* as well as conducting county to county transfers, how to accomplish those tasks within *imagineIS*. Training will take place in a dedicated training environment, after which the newly gained skills will be applied to the production environment using real cases.

### Who should attend?

Anyone responsible for intakes of new individuals requesting DODD service as well as managing county to county individual transfers.

### Prerequisite:

Familiarity with the Person Centered Principles concepts championed by Ohio DODD  
Comfortable operating a personal computer with mouse and establishing wireless connection  
Familiarity with internet browser

## *Agenda*

### Training Preparation

Individuals that can be entered into *imagineIS* for your county

### Introduction

Log-ons, Introductions, System Checks  
*ImagineIS* Overview  
Customer Eligibility Specialist Role Overview  
Processes – Overview Roles and Date Ranges/Spans  
Relationship – Primary CRM Role Relationships  
Dashboards – Customer Eligibility Specialist Dashboard

### Customer Eligibility Specialist

Create an Individual within *imagineIS*  
Send Notifications to SSA-Supervisor that anew individual has been created  
The Individual's Front Page  
County Transfers