



ImaginIS
Implementation and
Change Management Project

Customer Eligibility Specialist
Guide

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

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Setting Default Dashboard

Execute the following steps to set a default dashboard for the Customer Eligibility Specialist. Once assigned, the dashboard will be displayed each time that user signs on.

1. Sign on to *imaginIS* as *Customer Eligibility Specialist*
2. Select dropdown next to the dashboard selection to reveal the dashboard underneath
3. Select the Dashboard intended to make as default
4. Select the SET AS DEFAULT link

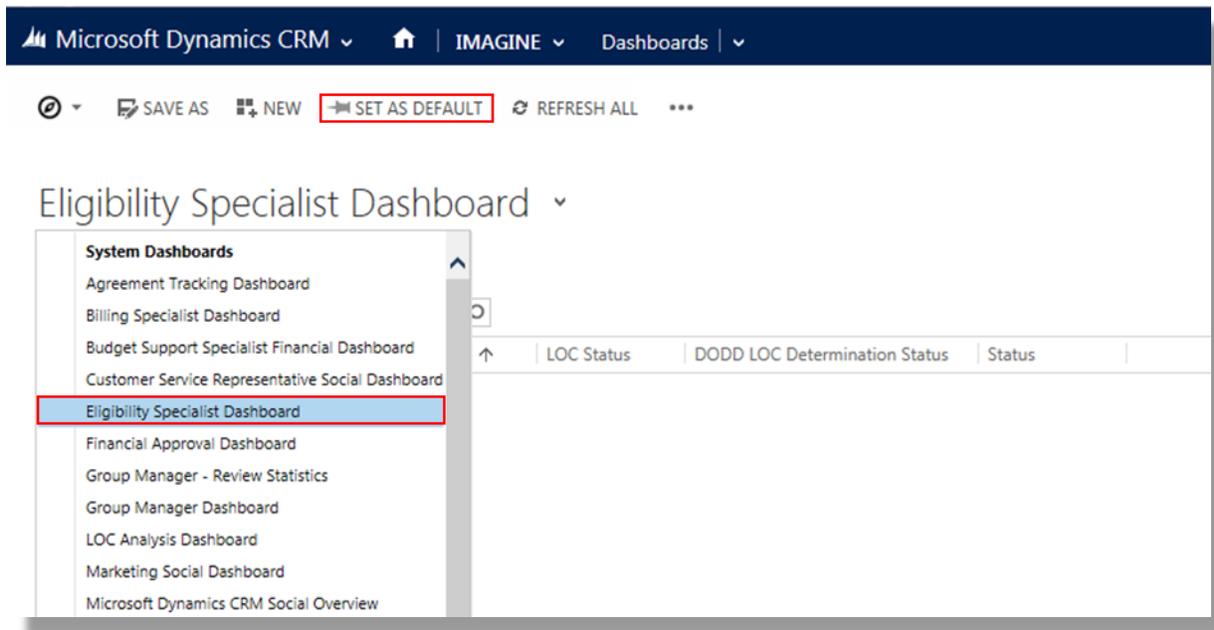


Figure 1 - Set Default Dashboard

Create a New Individual's Record

The following steps describe how to create a new record for an individual.

1. Sign in to *imaginIS* as Customer Eligibility Specialist
2. Select the CRM link
3. Click on the IMAGINE drop down
4. Click on the ELIGIBILITY Tile

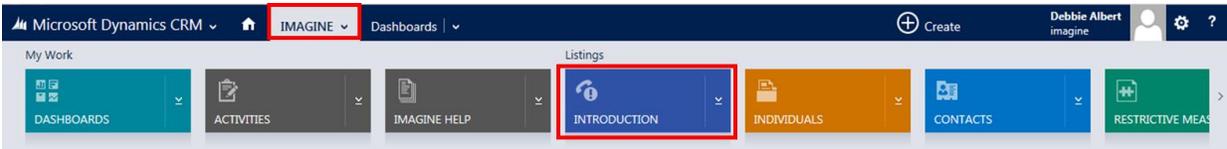


Figure 2 - Adding New Individual

5. Select the +New link

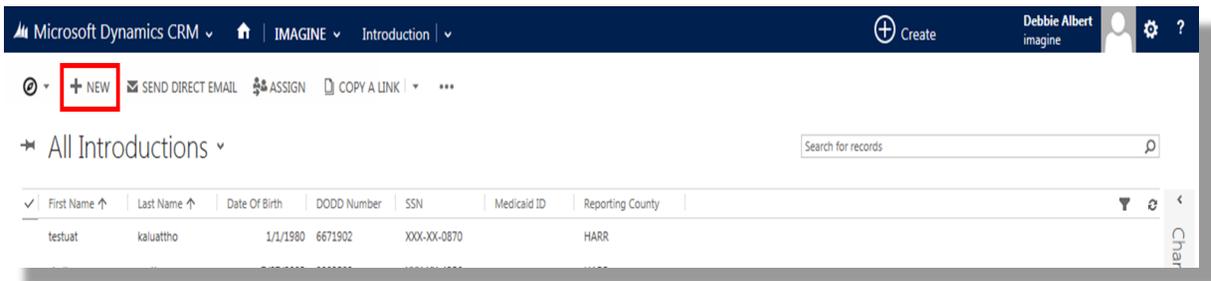


Figure 3 - Adding New Individual

6. Enter the following required fields:
 - a. First and Last Name
 - b. Date of Birth
 - c. Reporting and Resident Counties
7. Click 'SAVE'
 - a. If there is no SSN, a reason will need to be entered. Follow the prompts as requested.
 - b. After the SAVE button is selected, the screen will refresh. If not Select F5 to refresh
8. Select 'CREATE INDIVIDUAL' to create the DODD#

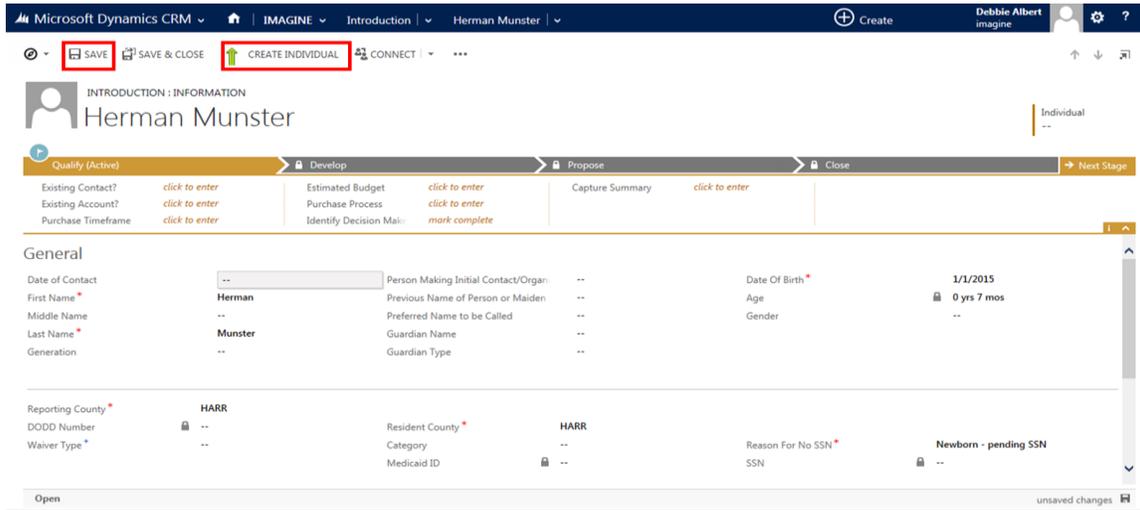


Figure 4 - Create Individual and Get DODD#

- 9. Select X to exit out of confirmation message
- 10. Press F5 to refresh the screen – Notice the DODD# now been populated

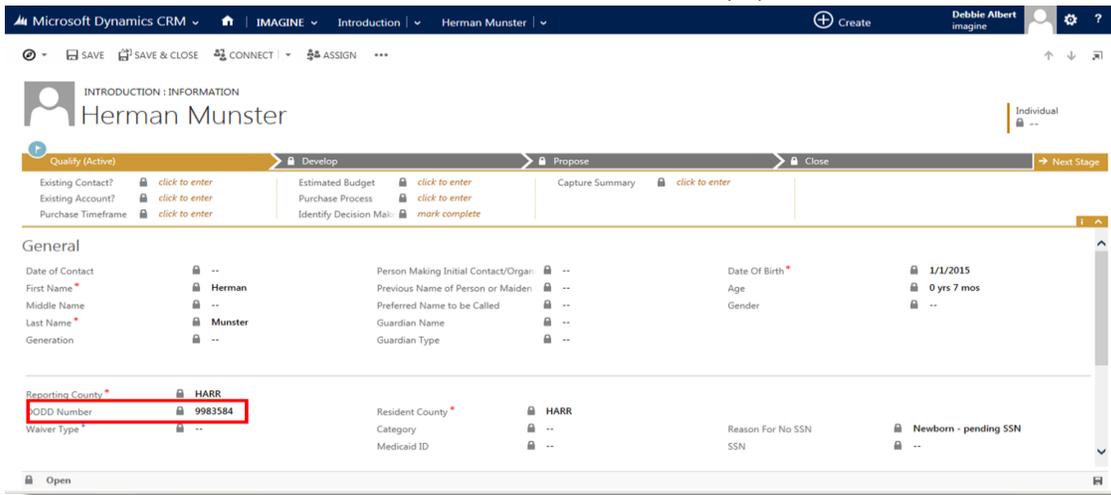


Figure 5 - DODD# is created

Note: SSN and Medicaid numbers are not required fields. They can be entered by the SSA at a later time. However, once either number is entered, it requires a system admin to update them.

Create/Send Notification to SSA Supervisor of New Individual

This process has been designed to send a notification to the SSA that a new individual has been added into the *imaginIS* system.

1. Sign in to *imaginIS* as Customer Eligibility Specialist
2. Change the Dashboard to SSA Supervisor/Director Caseload View

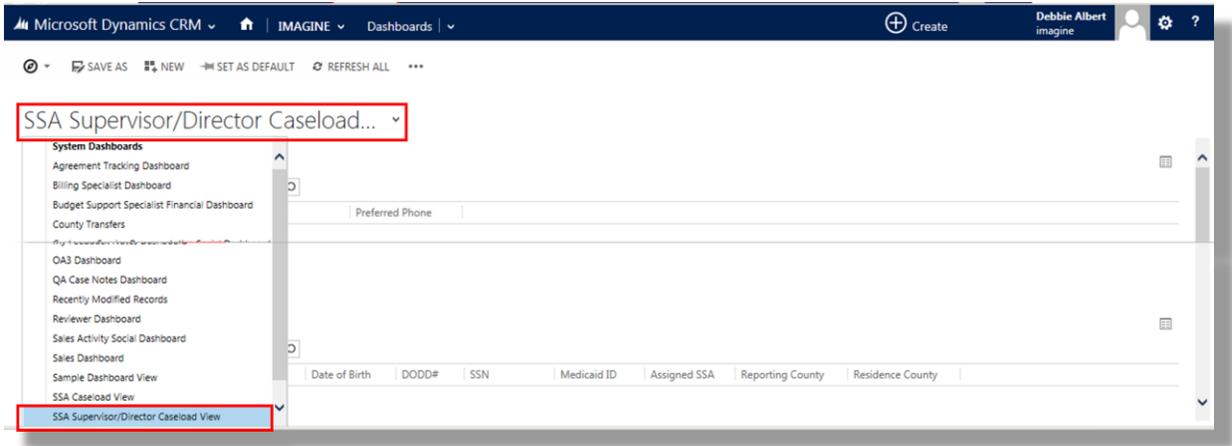
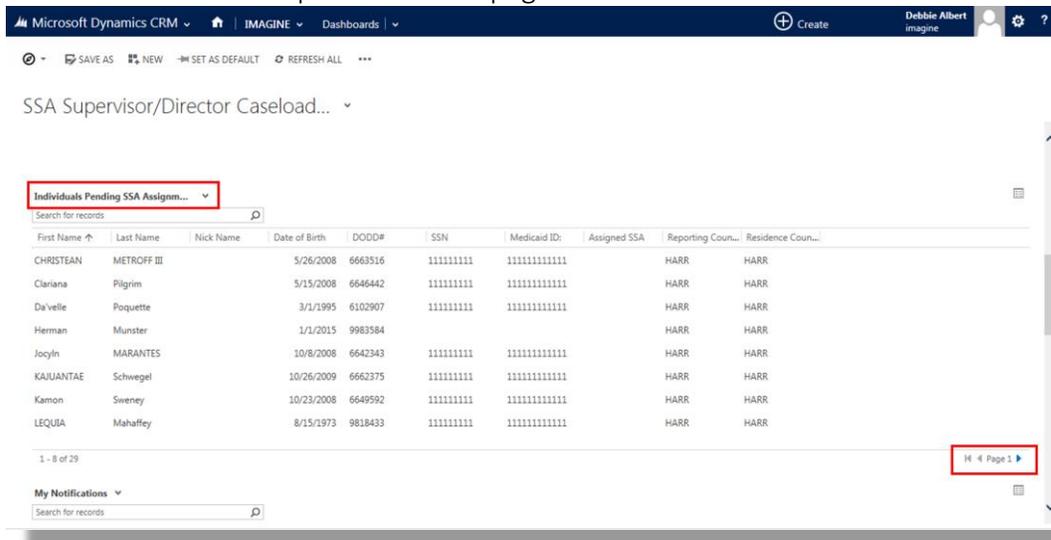


Figure 6 - Send Notification of New Individual

1. Scroll down the page to 'Individuals Pending SSA Assignment'
2. Look for the newly added Individual
 - a. Select Next Page if required
3. Click the Individual to open their front page



4. From the Individual's Front Page click on the More Commands (...)
5. Click on 'Other Activities'

6. Click 'Notification'

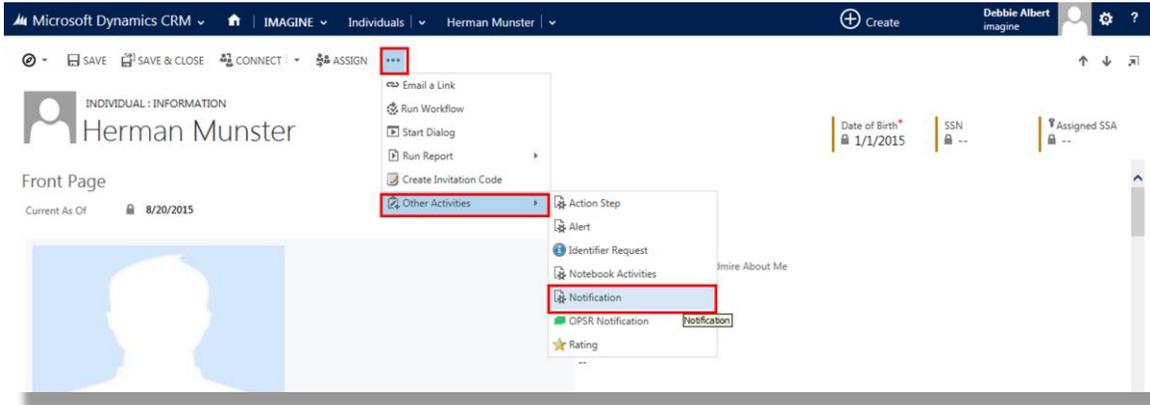


Figure 7- New Notification

4. New Notification screen will display; Enter required data.

Note: You must change the recipient to who the Notification is being sent to

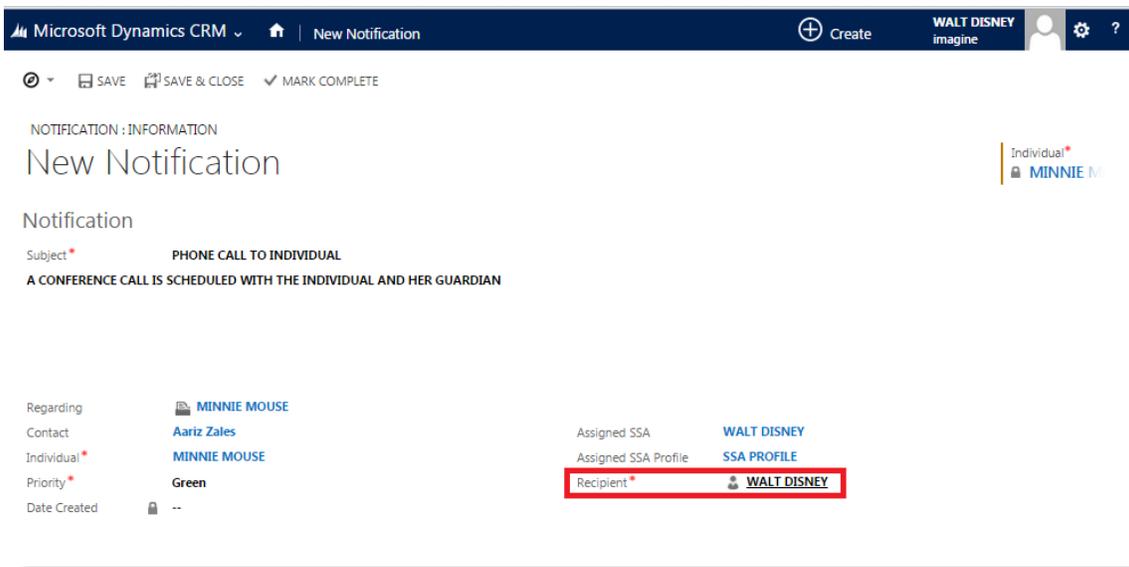


Figure 8 - Notification Details

County to County Transfer (The “Requesting” County)

This process is performed by the county gaining (requesting) the individual. This initiates the county to county transfer process. To complete the transfer, the county losing the individual is required to approve the transfer request.

1. Sign in to *imaginIS* as Customer Eligibility Specialist
2. Select the CRM link
3. Select the IMAGINE Tile

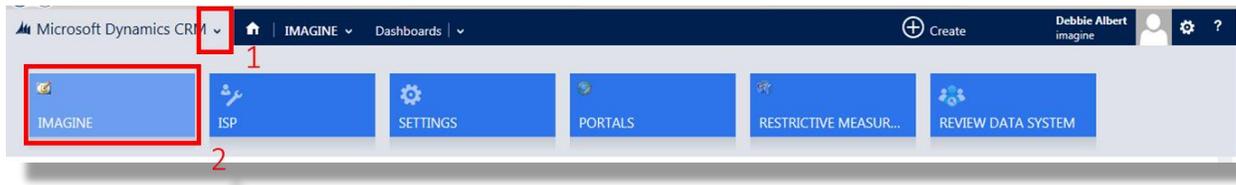


Figure 9 - Navigate to Individual

4. Select the IMAGINE dropdown
5. Select the INDIVIDUALS Tile
 - a. By default, only individuals in your reporting county will display.

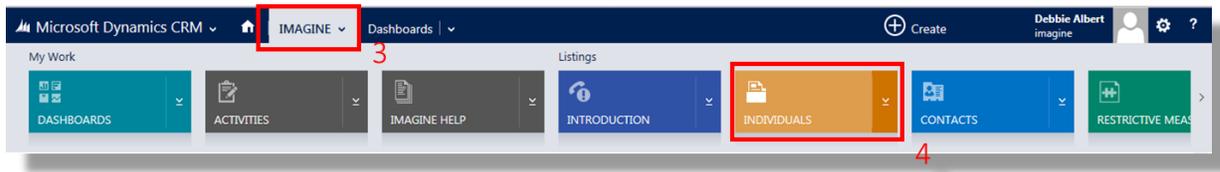


Figure 10 - Navigate to Individual

6. Search for the individual that is being transferred
 - a. The search will return individuals regardless of county
7. Double click on the individual’s name to open their front page

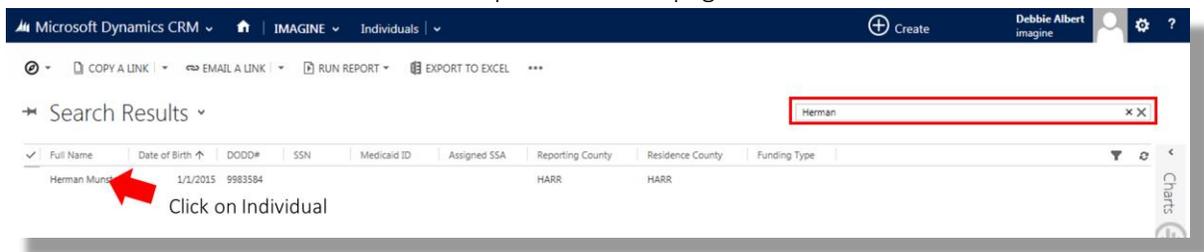


Figure 11 - Select individual to Transfer

8. Click on down arrow next to the Individuals Name
9. Select ‘INDIVIDUAL’S TRANSFER REQUEST’ Tile



Figure 12 - Transfer Request

10. Select 'Add New Transfer Request' link

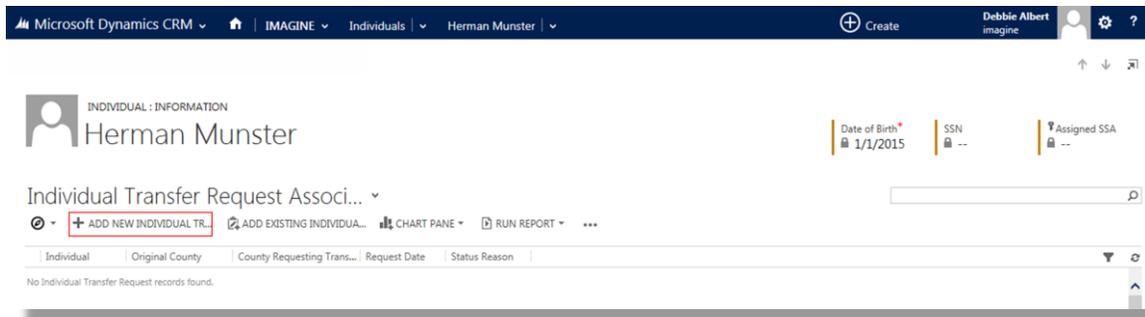


Figure 13 - Add New Transfer Request

11. When the transfer request window opens, review and then select 'SAVE & CLOSE'

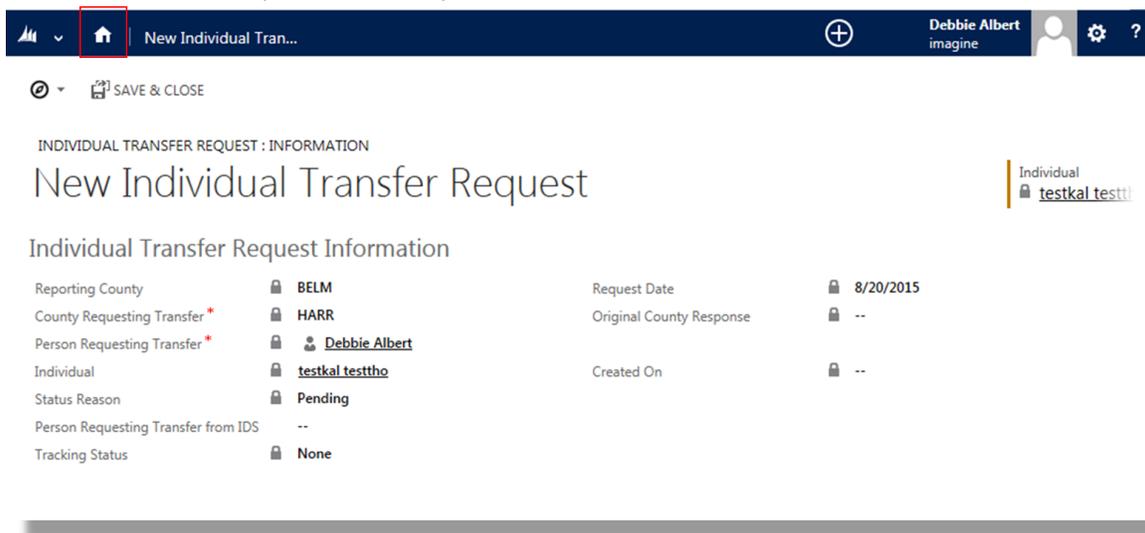


Figure 14 - Review New transfer Request

12. Select the Home Link
13. On the Individual Transfer Request Associated View, the individual being transferred is displayed with a status of 'Pending'

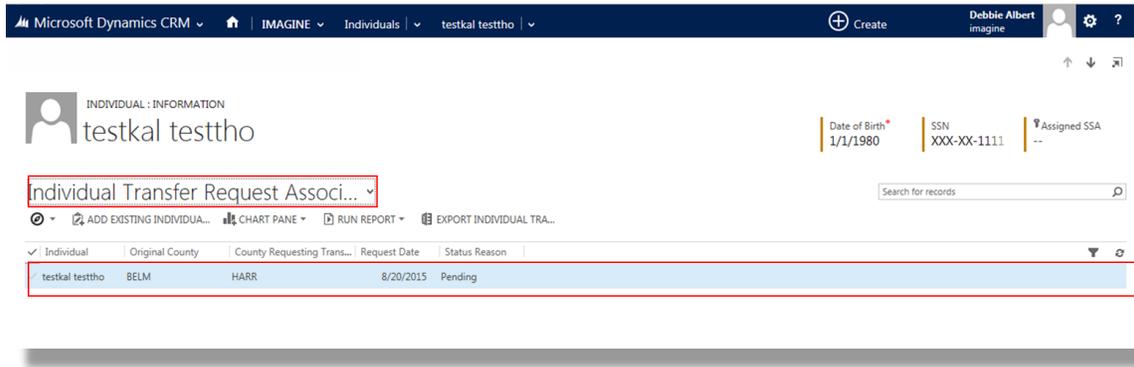


Figure 15 - Individual Transfer Request

NOTE: When the transfer is completed, the following occurs:

- Outcomes, Learning Logs Actions Plans, and Service Summaries are all marked 'Transferred' and then closed.
- The Reporting County is changed to the Gaining county,
- Connections are terminated and portal access ends for those connections.
- The assigned SSA is removed
- The transfer request is marked transferred and then hidden from view
- A PDF for the entire ISP is created

County to County Transfer (The “Losing” County)

This process is performed by the county losing the individual and is required to complete the county to county transfer process. The Transfer must be initiated by the requesting county before this process can be completed.

1. Sign in to *imaginIS* as Customer Eligibility Specialist
2. Change the Dashboard to ‘County Transfers’
3. Change the system view to ‘ITR Pending State’ **or** ‘Scroll down to Alerts’ and change to ‘All Open Alerts’)
4. Click on the Transfer Request Alert to open

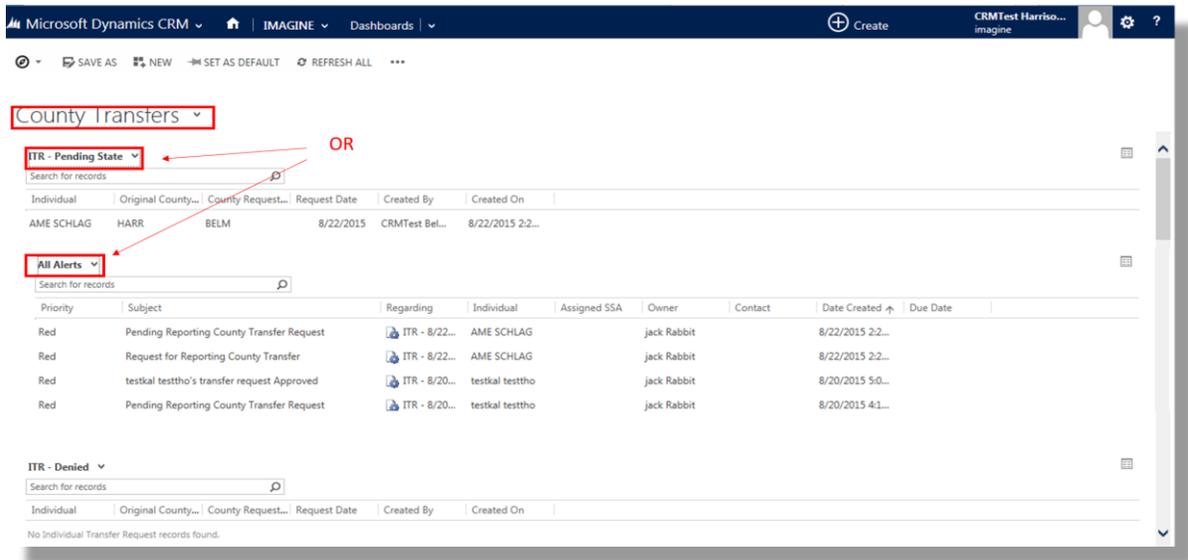


Figure 16 - County Transfer Alert

5. If the Alert was selected - Review the details of the Alert
6. If the Alert was selected - Select the ITR link next to ‘Regarding’ to open the request

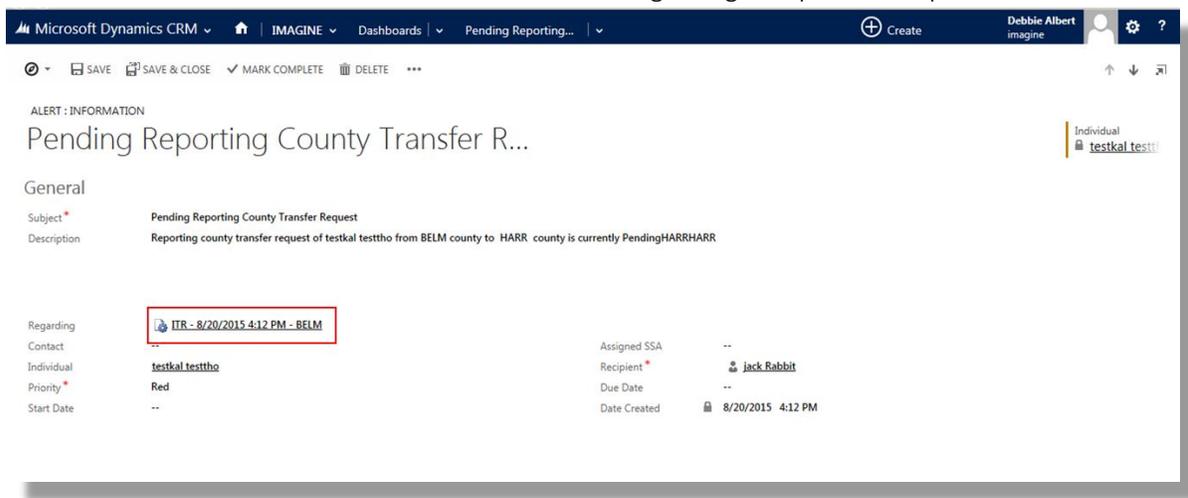


Figure 17 - County Transfer Alert

7. Review the request
8. Select from the dropdown to next Original County Response: 'Approve' or 'Deny'.
 - a. A reason for denying a transfer request will be required.

Microsoft Dynamics CRM | IMAGINE | Dashboards | ITR - 8/22/2015 2:2... | Create | CRMTest Harris... | imagine

SAVE & CLOSE | EMAIL A LINK | RUN WORKFLOW | START DIALOG

INDIVIDUAL TRANSFER REQUEST : INFORMATION
ITR - 8/22/2015 2:22 PM - HARR

Individual Transfer Request Information

Reporting County	HARR	Request Date	8/22/2015
County Requesting Transfer	BELM	Original County Response	Approve Deny
Person Requesting Transfer	CRMTest BelmontTest	Created On	8/22/2015 2:22 PM
Individual	AME SCHLAG		
Status Reason	Pending		
Person Requesting Transfer from IDS	--		
Tracking Status	None		

Active

Figure 18 - Approve or Deny Transfer Request

9. Select 'Save and Close'
10. If the Alert was selected, the request will close, and return to the Alert screen
11. If the Alert was selected: Select the 'Mark Complete' icon

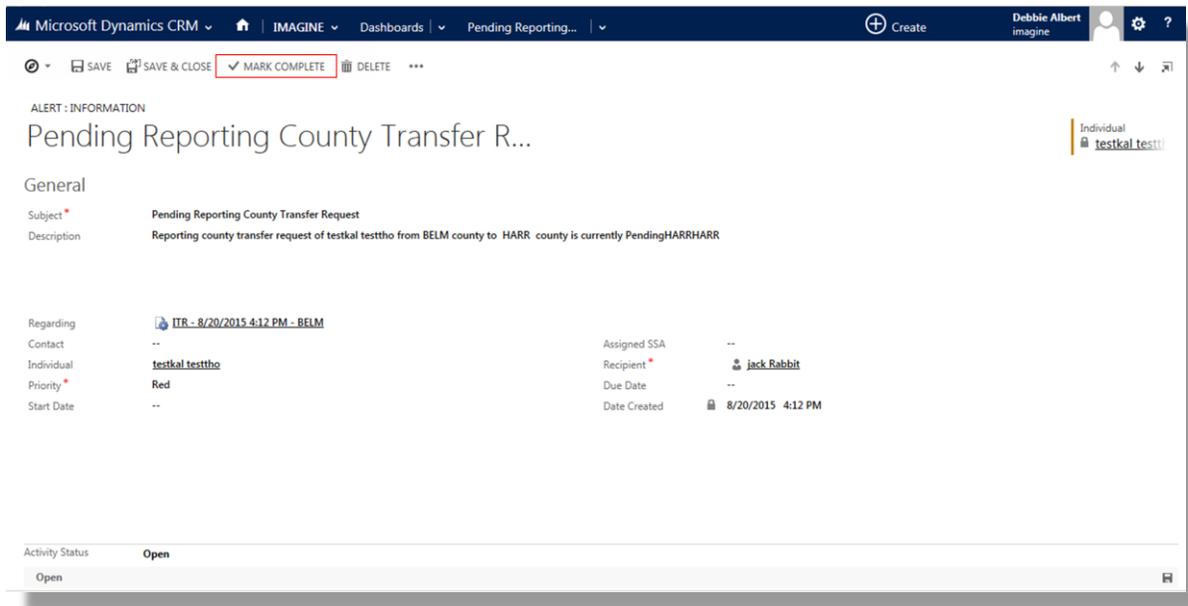


Figure 19 - Mark Transfer Alert Complete

NOTE: When the transfer is completed, the following occurs:

- Outcomes, Learning Logs, Actions Plans, and Service Summaries are all marked 'Transferred' and closed.
- The Reporting County is changed to the requesting county
- Connections are terminated and portal access ends for those connections
- The assigned SSA is removed
- The transfer request is marked transferred and then hidden from view
- A PDF for the entire ISP is created and is placed in the 'ISP Archive' SharePoint folder

Canceling a County to County Transfer

To cancel a requested transfer, do the following:

1. Sign in to *imaginIS* as Customer Eligibility Specialist
2. Select the CRM link
3. Select the IMAGINE Tile

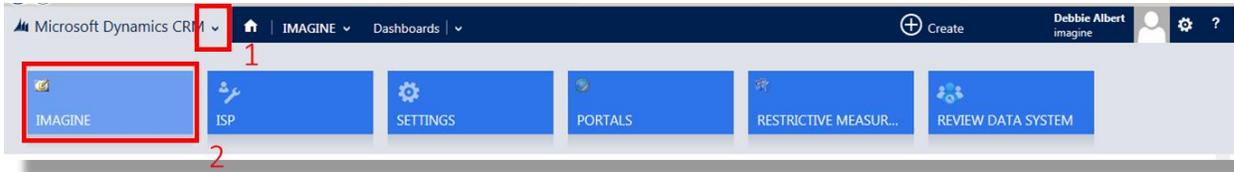


Figure 20 - Navigate to Individual

4. Select the IMAGINE dropdown
5. Select the INDIVIDUALS Tile
 - a. By default, only individuals in your reporting county will display.

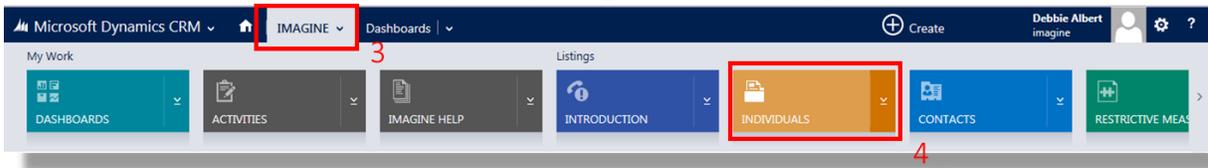


Figure 21 - Navigate to Individual

6. Search for the individual that is being transferred
 - a. The search will return individuals regardless of county
7. Double click on the individual's name to open their front page



Figure 22 - Select individual to Transfer

8. Click on down arrow next to the Individuals Name
9. Select 'INDIVIDUAL'S TRANSFER REQUEST' Tile



Figure 23 - Transfer Request

10. Click to open the pending transfer request

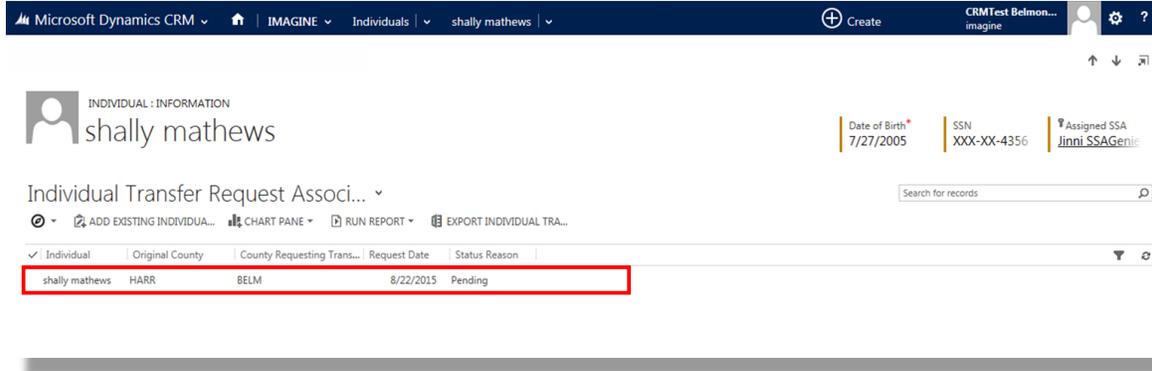


Figure 24 - Click Pending Transfer Request

11. Select 'Cancel Transfer' Request link

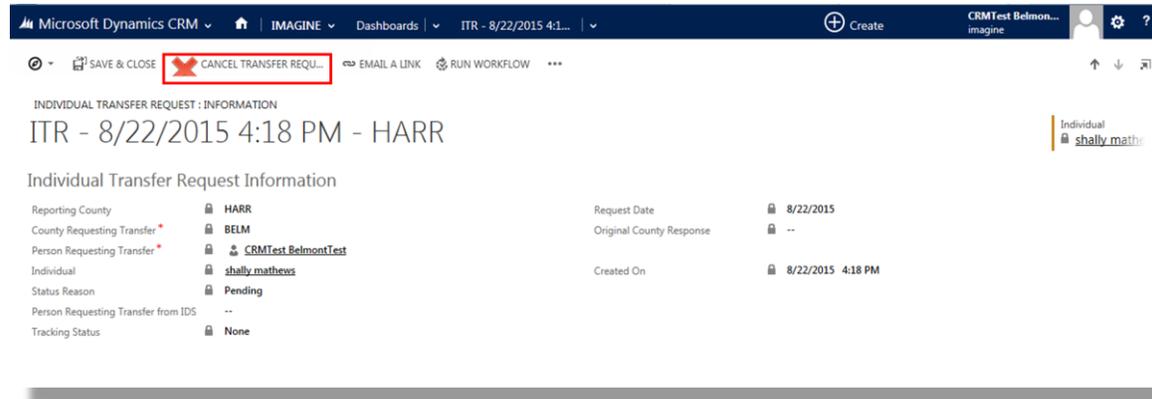


Figure 25 - Cancel Transfer

12. Select OK to the message boxes
13. Notice the Status Reason is now 'Cancelled'

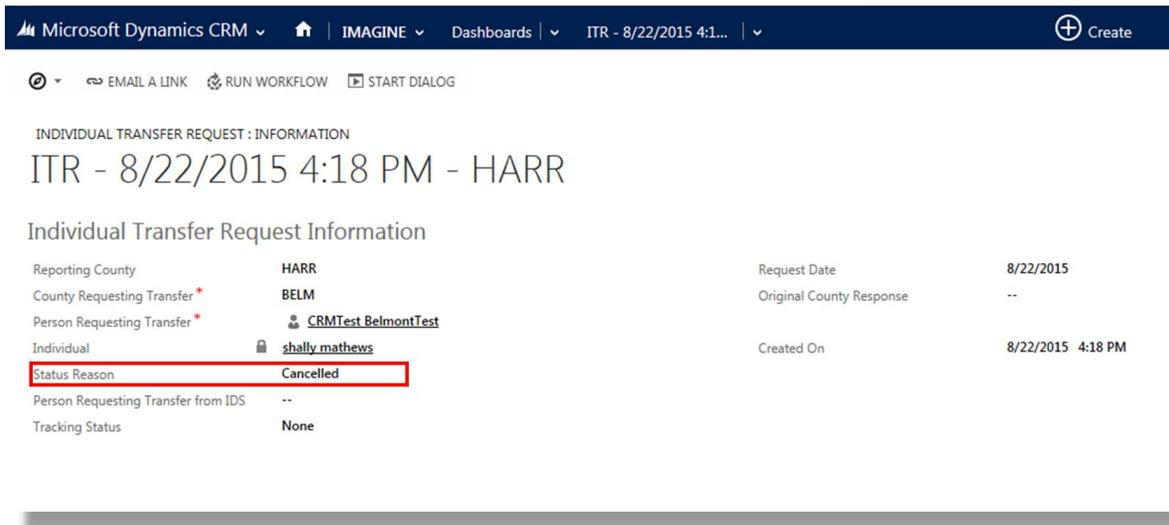


Figure 26 - Completed Canceled Transfer MSG

14. Click the Home key

Note: When the transfer is canceled, the following occurs

- The transfer request status is changed to 'Cancelled'
- The transfer is hidden from the Active Transfer grid
- The cancellation is displayed on the ITR dashboard

Dropped Transfers

A dropped transfer is a record that has been in a pending status after forty-four (44) days. The dropped transfer can only be reviewed; it cannot be reactivated. To clean up a transfer, a request must be made with DODD via ticket. To view dropped transfers, do the following:

1. Sign in to *imaginIS* as Customer Eligibility Specialist
2. Select the CRM link
3. Select the IMAGINE Tile

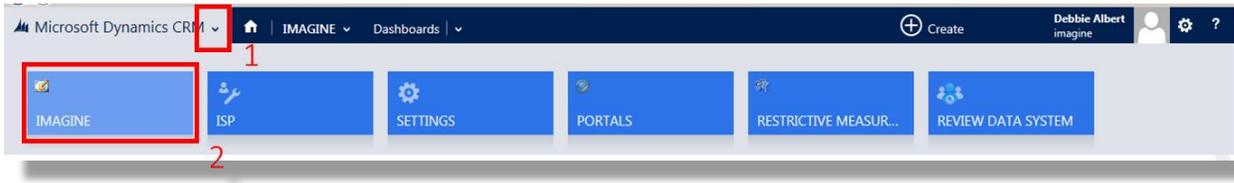


Figure 27 - Navigate to Individual

4. Select the IMAGINE dropdown
5. Select the INDIVIDUALS Tile
 - a. By default, only individuals in your reporting county will display.

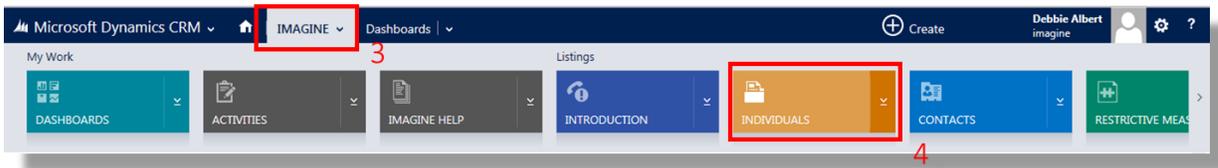


Figure 28 - Navigate to Individual

6. Search for the individual that is being transferred
 - a. The search will return individuals regardless of county
7. Double click on the individual's name to open their front page



Figure 29 - Select individual to Transfer

8. Click on down arrow next to the Individuals Name
9. Select 'INDIVIDUAL'S TRANSFER REQUEST' Tile

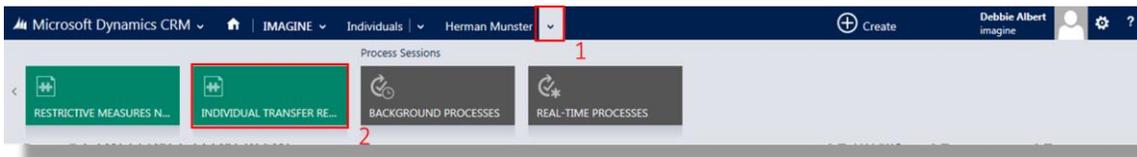


Figure 30 - Select Individual Transfer - Dropped

10. Select ITR MDA – Denied/Dropped/Canceled from the drop down to display dropped transfers

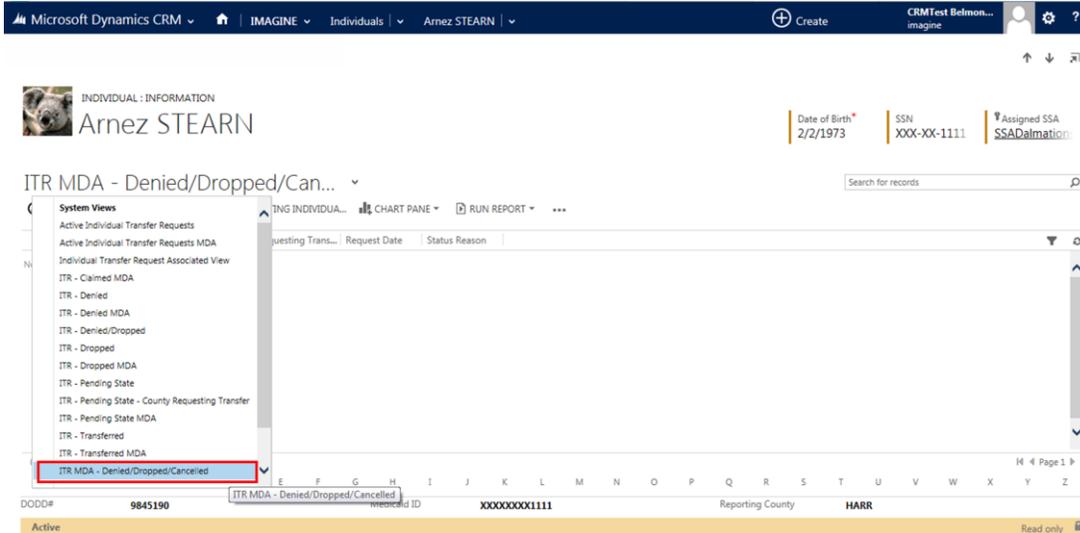


Figure 31 - Select ITR MDA - Dropped

ImagineIS to Non-*ImagineIS* County Transfers

Until all counties are active in *ImagineIS*, there will be a need to manage transferring individuals from *ImagineIS* to *non-ImagineIS* counties. Below are notes describing the process and following are the step by step instructions:

ImagineIS to *Non-ImagineIS* transfers must be initiated by the gaining county in IDS but the losing county must complete the transfer in *ImagineIS*. The *ImagineIS* County must use the transfer record in *ImagineIS* to approve or deny the request. No part of the transfer will be completed in IDS for the *ImagineIS* County.

Follow the process described above described in the section titled: County to County Transfer (**The “Losing” County**).

Locating IDS information in imaginIS

Although IDS is the record of source, there are portals in *imaginIS* that display pertinent IDS information. This functionality reduces the need to use the IDS systems.

The following information can be found under the 'County Information' title

- Residence, Reporting, and Waiver County
- Enrollment and Termination Dates
- Waiver Type, Status, Start and End Dates
- Assigned SSA
- DODD Source MUI, Date of Death, and IDS Living Arrangement

The following information can be found under the 'Funding Quick Summary' title

- Medicaid Eligibility
- Waiver
- AAI
- ODDP Funding
- PA Information
- Current Behavior Support, Medical Assistance, and Community Inclusion Add-On
- Self-Budget Waiver
- TDD Budget Limitation Information
- Waiting List summary

To get to the individuals front page, do the following:

1. Sign in to *imaginIS* as Customer Eligibility Specialist
2. Select the CRM link
3. Select the IMAGINE Tile

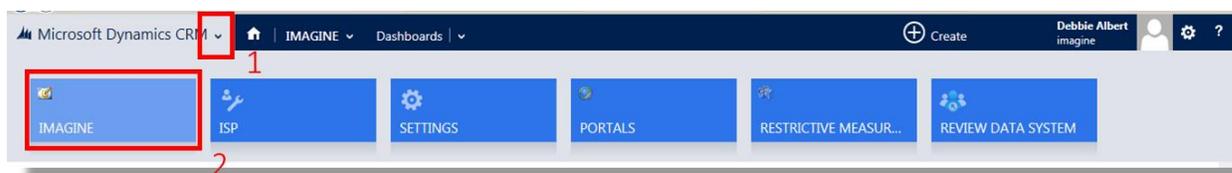


Figure 32 - Navigate to Individual

4. Select the IMAGINE dropdown
5. Select the INDIVIDUALS Tile

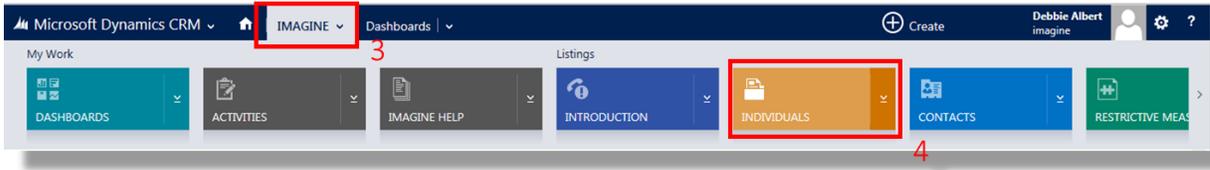


Figure 33 - Navigate to Individual

6. Search for the individual
 - a. The search will return individuals regardless of county
7. Double click on the individual's name to open their front page

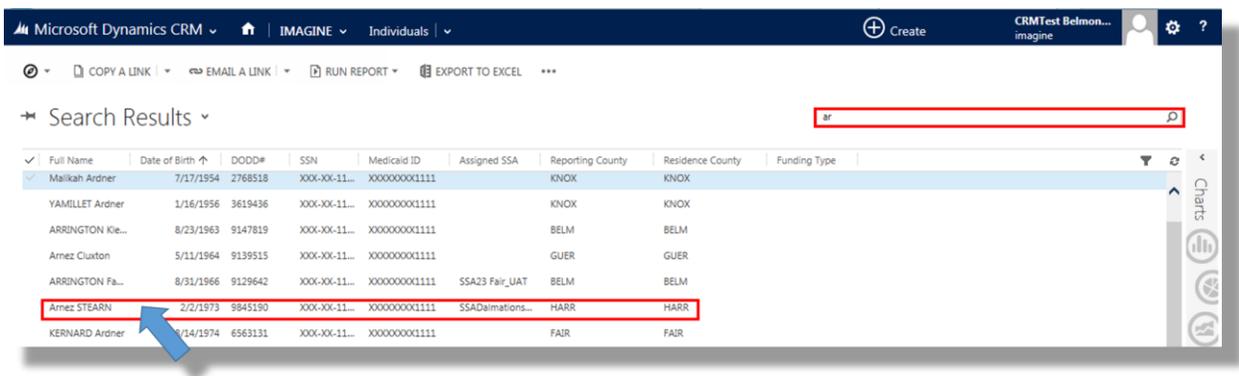


Figure 34 - Search and Select an Individual

8. Click on County Information and Funding Quick Summary to open

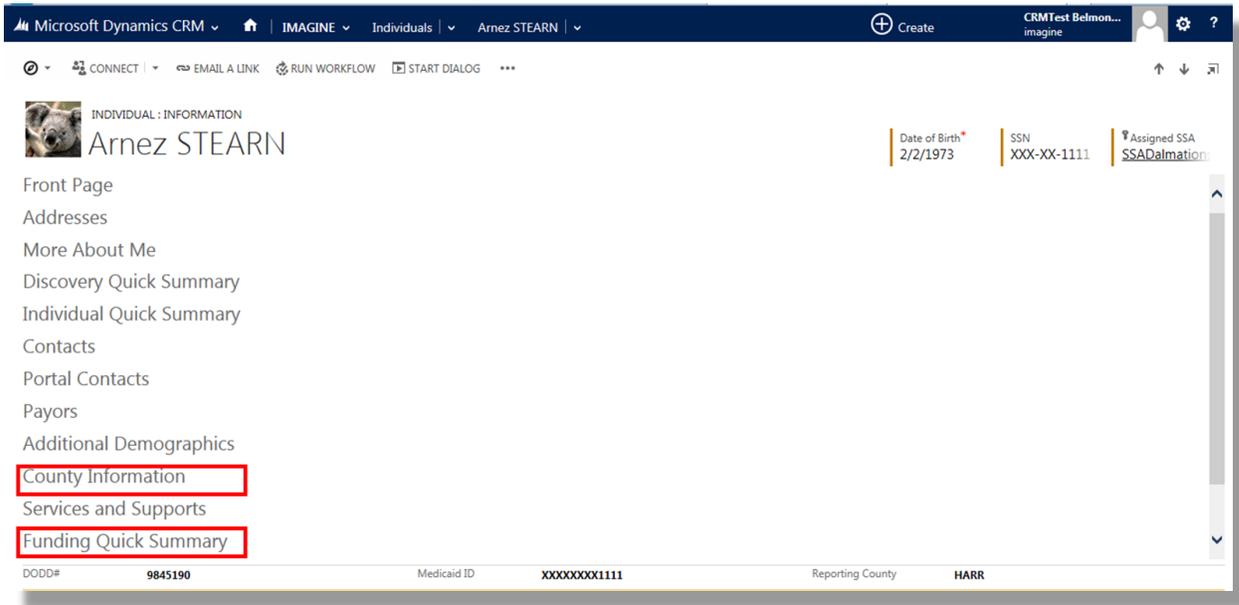


Figure 35 - Individual's Front Page with Collapsed Titles