



Customer Eligibility

August 24 2015

DODD

Paradigm Shift

- FROM: Service Centered

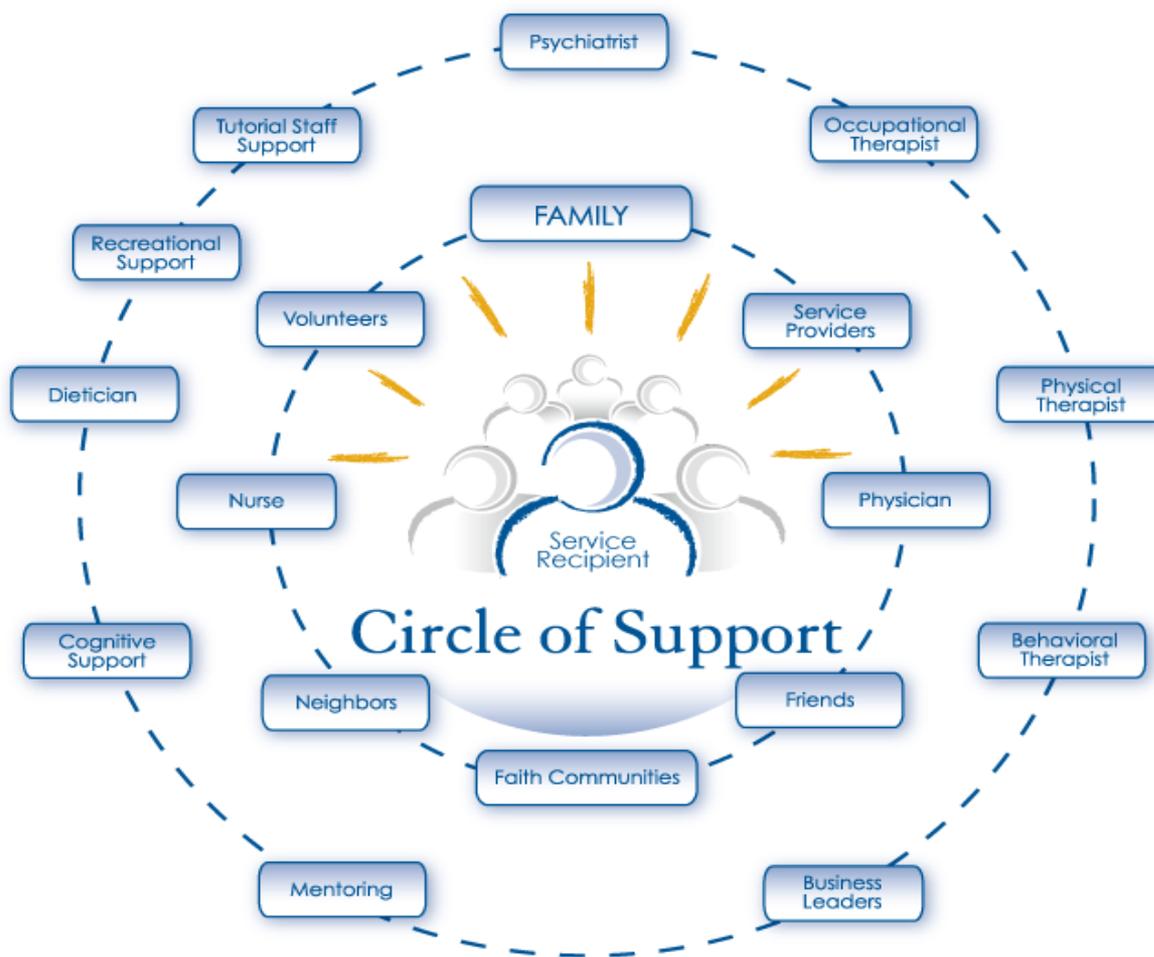
External sources are deciding what is best for an Individual in the planning process

- TO: Person Centered

The Individual is at the center of the planning process and tells the external sources what is best for them. The Individual is the focus.

*Source: Service and Support Administration 5123:2-1-11 as of 1/24/2014

Circle of Support



What is *imaginelS*?

- A tool that was built on Person Center Principles of:
 - Transparency
 - Collaboration
 - Individual and Team Involvement

*Source: <http://dodd.ohio.gov/ImagineIS/Pages/default.aspx>

Why use *imaginels*

imaginels offers the Individual's team real-time access to information:

Individual's Team

- Providers, County Board Personnel
- Family, Guardians

Immediate Access to

- Discovery, Learning Logs, Action Plans and Action Steps

*Source: <http://dodd.ohio.gov/imaginels/Pages/default.aspx>

Content

Overview (What we imagine)

- Create an Individual
- Send notification to SSA Supervisor of new Individual
- Individual's Front Page
- County Transfers within imagineIS

Switch to the 'What We Imagine' ppt to provide an ***imaginelS*** overview.

Sign on Credentials

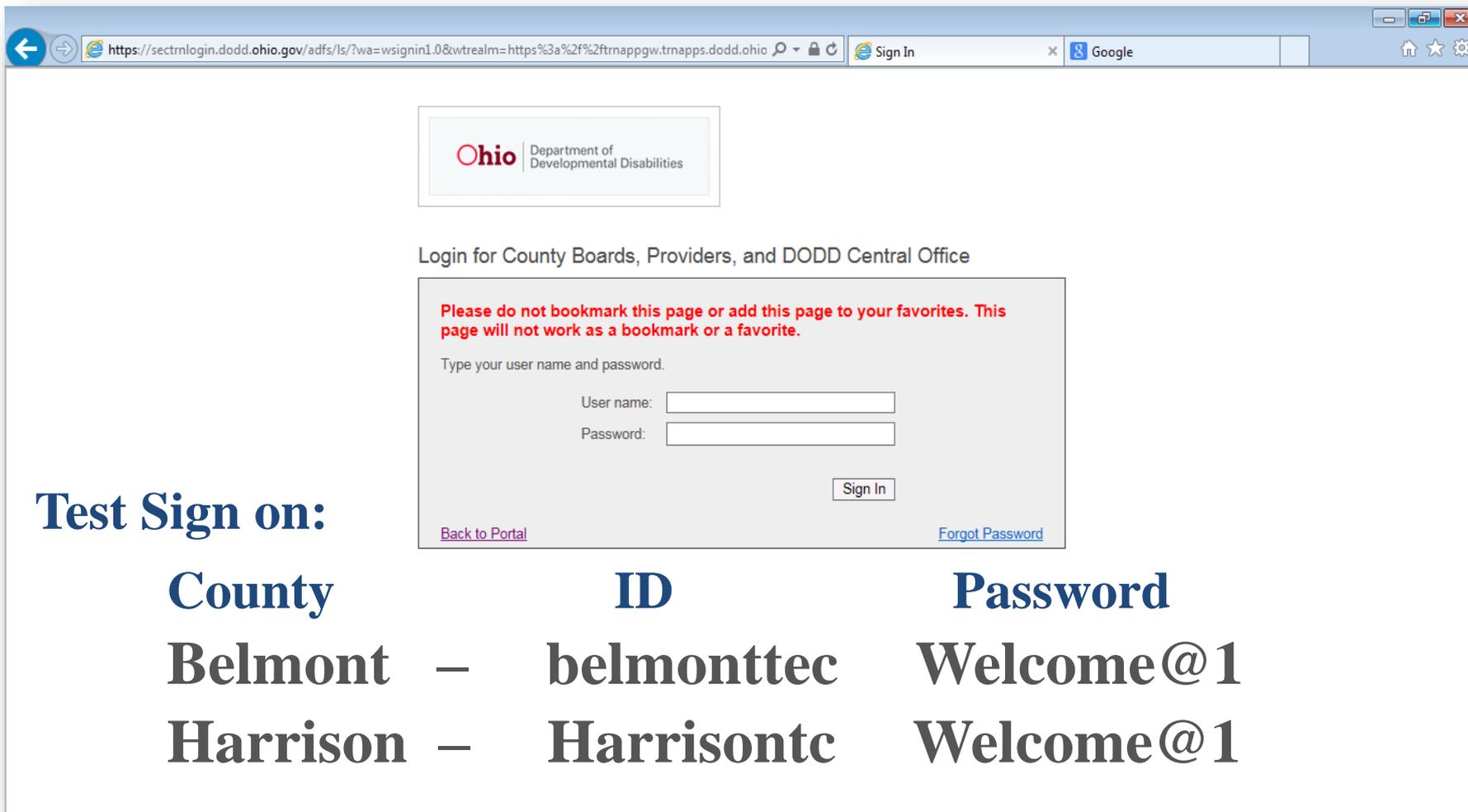
Wi-Fi: _____

Password: _____

Imagine Training Site:

<https://sectrnlogin.dodd.ohio.gov/adfs/ls/?wa=wsignin1.0&wtrealm=https%3a%2f%2fimagine.trnapps.dodd.ohio.gov%2f&wctx=rm%3d1%26id%3d1d492010-8e0e-440a-a164-40a898792cf3%26ru%3dhttps%253a%252f%252fimagine.trnapps.dodd.ohio.gov%252fdefault.aspx&wct=2015-05-28T20%3a06%3a51Z&wauth=urn%3aoasis%3anames%3atc%3aSAML%3a1.0%3aam%3apassword>

Sign on Credentials



Test Sign on:

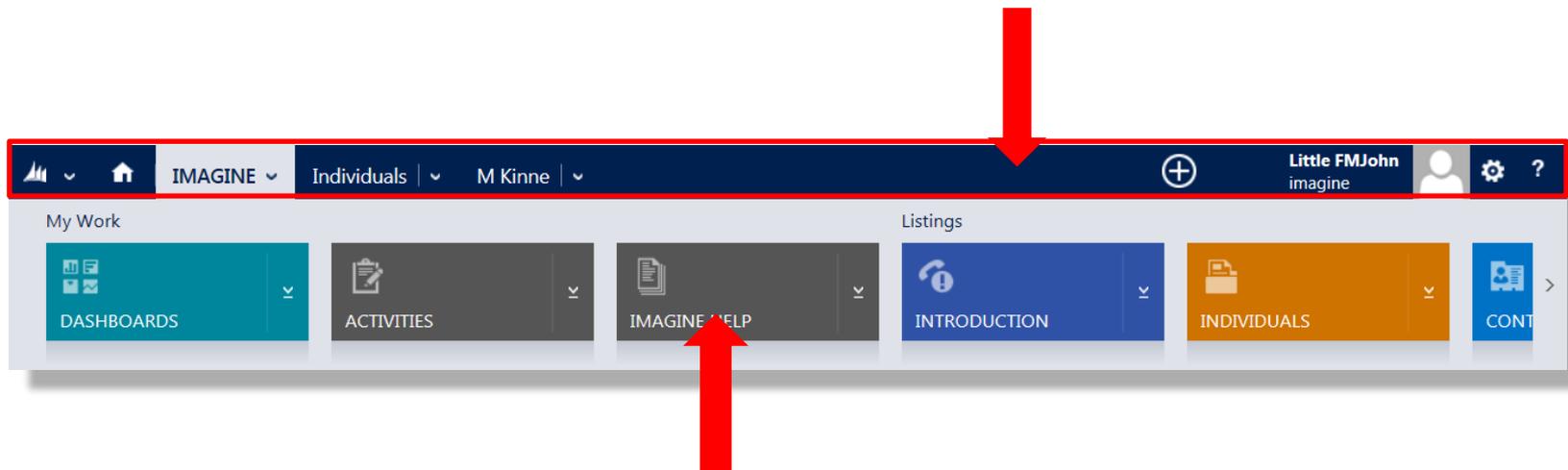
County	ID	Password
Belmont	— belmonttec	Welcome@1
Harrison	— Harrisontc	Welcome@1

imagineIS Default Page

The screenshot displays the Microsoft Dynamics CRM interface for the 'imagine' system. The top navigation bar includes 'Microsoft Dynamics CRM', 'IMAGINE', and 'Dashboards'. The user profile is 'CRMTes Belmon... imagine'. The main content area is titled 'County Transfers' and features two data tables. The first table, 'ITR - Pending State', shows a record for 'testkal testtho' with columns for Individual, Original County (BELM), County Request (HARR), Request Date (8/20/2015), Created By (Debbie Albert), and Created On (8/20/2015 4:1...). The second table, 'ITR - Denied', shows a record for 'Sheyoshi Zales' with columns for Individual, Original County (BELM), County Request (LICK), Request Date (11/26/2014), Created By (Brian Harrigan), and Created On (11/26/2014 2:...). A large 'Default Page' watermark is overlaid diagonally across the center of the image.

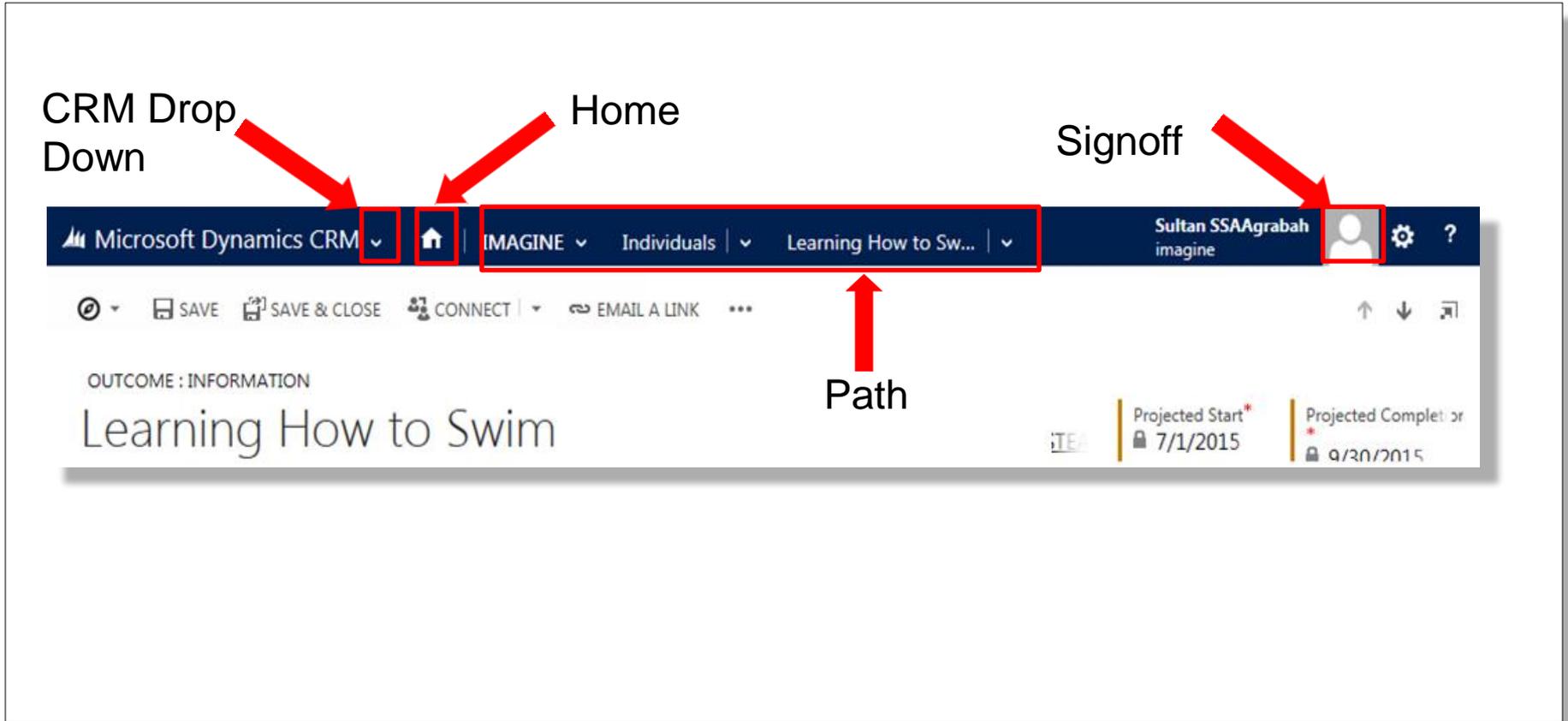
*imagine*S Navigation (Terms)

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 several action buttons: a refresh icon, 'SAVE AS', 'NEW', 'SET AS DEFAULT', 'REFRESH ALL', and a menu icon. 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 section titled 'SSA Caseload View' with a dropdown arrow. A red arrow points to this dropdown arrow with the text 'Dropdown arrow'. Below the dropdown is a search box labeled 'Search for records' and a table with the following data:

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.

Content

- Overview (What we imagine)

Create an Individual

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Create an Individual

Microsoft Dynamics CRM | IMAGINE | Dashboards

My Work: DASHBOARDS, ACTIVITIES, IMAGINE HELP, INTRODUCTION, INDIVIDUALS, CONTACTS, RESTRICTIVE MEASU...

ITR - Pending State

Search for records

Individual	Original County...	County Request...	Request Date	Created By	Created On
No Individual Transfer Request records found.					

Microsoft Dynamics CRM | IMAGINE | Introduction

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

All Introductions

First Name	Last Name	Date Of Birth	DODD Number	SSN	Medicaid ID	Reporting County
A	A	2/2/2000		XXX-XX-2000		BELM
b	anderson	8/5/2015				BELM
a	b	8/12/2015				BELM
Jane	Doe	1/1/2015	9983590			BELM

Create an Individual

Microsoft Dynamics CRM | IMAGINE | Introduction | New Introduction | Create | CRMTest Belmon... imagine

INTRODUCTION : INFORMATION
New Introduction | Individual

Qualify (Active) | Develop | Propose | Close | Next Stage

General

Date of Contact	Person Making Initial Contact/Organ...	Date of Birth *
First Name *	Previous Name of Person or Maiden	Age
Middle Name	Preferred Name to be Called	Gender
Last Name *	Guardian Name	
Generation	Guardian Type	

Medicaid ID | Reporting County * OTHER | S S N

DODD Number | Resident County

Waiver Type | Category

Description

Owner: CRMTest BelmontTest

1. Enter required data
2. Select Save (Not Save and Close) – This will present an selection to create the DODD# for the individual.

Create an Individual

Microsoft Dynamics CRM | IMAGINE | Introduction | Porky Pig | Create

SAVE | SAVE & CLOSE | **CREATE INDIVIDUAL** | CONNECT | ...

INTRODUCTION : INFORMATION
Porky Pig

Qualify (Active) | Develop | Propose | Close

Existing Contact?	click to enter	Estimated Budget	click to enter	Capture Summary	click to enter
Existing Account?	click to enter	Purchase Process	click to enter		
Purchase Timeframe	click to enter	Identify Decision Maker	mark complete		

General

Date of Contact	--	Person Making Initial Contact/Organizational Unit	--	Date Of Birth *	8/2/2015
First Name *	Porky	Previous Name of Person or Maiden Name	--	Age	0 yrs 0 mos
Middle Name	--	Preferred Name to be Called	--	Gender	Male
Last Name *	Pig	Guardian Name	--		
Generation	--	Guardian Type	--		

Reporting County *	BELM	Resident County *	BELM	Reason For No SSN *	Newborn - pending SSN
DODD Number	--	Category	--	SSN	--
Waiver Type *	--	Medicaid ID	--		

Description

--

Owner * [Belmont Ownership Team](#)

Open

1. Select 'CREATE INDIVIDUAL' to assign a DODD#
2. Press F5 to refresh

Create an Individual

Microsoft Dynamics CRM | IMAGINE | Introduction | Porky Pig

INTRODUCTION : INFORMATION
Porky Pig

Quality (Active) | Develop | Propose | Close | Next Stage

Existing Contact? *click to enter*
Existing Account? *click to enter*
Purchase Timeframe *click to enter*
Estimated Budget *click to enter*
Purchase Process *click to enter*
Identify Decision Maker *mark complete*
Capture Summary *click to enter*

General

Date of Contact	--	Person Making Initial Contact/Organ	--	Date Of Birth*	8/2/2015
First Name*	Porky	Previous Name of Person or Maiden	--	Age	0 yrs 0 mos
Middle Name	--	Preferred Name to be Called	--	Gender	Male
Last Name*	Pig	Guardian Name	--		
Generation	--	Guardian Type	--		

Reporting County*	BELM	Resident County*	BELM	Reason For No SSN	Newborn - pending SSN
DODD Number	9983592	Category	--	SSN	--
Waiver Type*	--	Medicaid ID	--		

Description

--

Owner* Belmont Ownership Team

Open

DODD Number is created

Content

- Overview (What we imagine)
- Create an Individual

Send notification to SSA Supervisor of new Individual

- Individual's Front Page
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Send Notification to SSA Supervisor

The screenshot shows the Microsoft Dynamics CRM interface. At the top, the navigation bar includes "Microsoft Dynamics CRM", "IMAGINE", and "Dashboards". The user profile "Debbie Albert" is visible in the top right corner. Below the navigation bar, there are action buttons: "SAVE AS", "NEW", "SET AS DEFAULT", and "REFRESH ALL".

The main content area displays a dropdown menu for "SSA Supervisor/Director Caseload..." which is highlighted with a red box. The dropdown list includes the following items:

- System Dashboards
- Agreement Tracking Dashboard
- Billing Specialist Dashboard
- Budget Support Specialist Financial Dashboard
- County Transfers
- OA3 Dashboard
- QA Case Notes Dashboard
- Recently Modified Records
- Reviewer Dashboard
- Sales Activity Social Dashboard
- Sales Dashboard
- Sample Dashboard View
- SSA Caseload View
- SSA Supervisor/Director Caseload View (highlighted with a red box)

To the right of the dropdown menu, the text "1. Change to SSA Supervisor/Director Caseload View" is displayed. Below the dropdown menu, a table is visible with columns: "Date of Birth", "DODD#", "SSN", "Medicaid ID", "Assigned SSA", "Reporting County", and "Residence County".

Send Notification to SSA Supervisor

Microsoft Dynamics CRM | IMAGINE | Dashboards | Create | Debbie Albert imagine

SSA Supervisor/Director Caseload... ▾

1. Scroll Down to Individuals 'Pending SSA Assignment' view
2. Search for the new individual.
3. Click to open the individual's front page

Individuals Pending SSA Assignm... ▾

Search for records

First Name ↑	Last Name	Nick Name	Date of Birth	DODD#	SSN	Medicaid ID:	Assigned SSA	Reporting Coun...	Residence Coun...
CHRISTEAN	METROFF III		5/26/2008	6663516	111111111	111111111111	HARR	HARR	
Clariana	Pilgrim		5/15/2008	6646442	111111111	111111111111	HARR	HARR	
Da'velle	Poquette		3/1/1995	6102907	111111111	111111111111	HARR	HARR	
Herman	Munster		1/1/2015	9983584			HARR	HARR	
Joclyn	MARANTES		10/8/2008	6642343	111111111	111111111111	HARR	HARR	
KAJUANTAE	Schwegel		10/26/2009	6662375	111111111	111111111111	HARR	HARR	
Kamon	Sweney		10/23/2008	6649592	111111111	111111111111	HARR	HARR	
LEQUIA	Mahaffey		8/15/1973	9818433	111111111	111111111111	HARR	HARR	

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Page 1

My Notifications ▾

Search for records

Send Notification to SSA Supervisor

The screenshot displays the Microsoft Dynamics CRM interface for the user 'Herman Munster'. The top navigation bar includes 'Microsoft Dynamics CRM', 'IMAGINE', 'Individuals', and 'Herman Munster'. The user 'Debbie Albert' is logged in. The main area shows the 'INDIVIDUAL : INFORMATION' for Herman Munster, with fields for 'Date of Birth' (1/1/2015), 'SSN' (--), and 'Assigned SSA' (--). A 'Front Page' section is visible below. A context menu is open over the 'ASSIGN' button, with 'Other Activities' selected. The 'Other Activities' sub-menu is also open, showing options like 'Action Step', 'Alert', 'Identifier Request', 'Notebook Activities', 'Notification', 'OPSR Notification', and 'Rating'. The 'Notification' option is highlighted with a red box.

Send Notification to SSA Supervisor

The screenshot shows the 'New Notification' form in Microsoft Dynamics CRM. The top navigation bar includes 'Microsoft Dynamics CRM', 'New Notification', 'Create', and the user profile 'WALT DISNEY imagine'. Below the navigation bar are buttons for 'SAVE', 'SAVE & CLOSE' (highlighted with a red box), and 'MARK COMPLETE'. The form title is 'New Notification' with a sub-header 'NOTIFICATION : INFORMATION'. The subject is 'PHONE CALL TO INDIVIDUAL' with a description 'A CONFERENCE CALL IS SCHEDULED WITH THE INDIVIDUAL AND HER GUARDIAN'. The 'Regarding' field is set to 'MINNIE MOUSE'. The 'Assigned SSA' is 'WALT DISNEY', the 'Assigned SSA Profile' is 'SSA PROFILE', and the 'Recipient' is 'WALT DISNEY' (highlighted with a red box). A red arrow points to the 'MINNIE MOUSE' field with the annotation '1. Enter the required fields.' Another red arrow points to the 'WALT DISNEY' field in the 'Recipient' dropdown with the annotation '2. Must change the recipient to the SSA Supervisor that should receive the notification'.

Microsoft Dynamics CRM | New Notification | Create | WALT DISNEY imagine

SAVE | **SAVE & CLOSE** | MARK COMPLETE

NOTIFICATION : INFORMATION

New Notification

Individual* MINNIE M

Notification

Subject* **PHONE CALL TO INDIVIDUAL**
A CONFERENCE CALL IS SCHEDULED WITH THE INDIVIDUAL AND HER GUARDIAN

Regarding **MINNIE MOUSE**

Contact **Aariz Zales**

Individual* **MINNIE MOUSE**

Priority* **Green**

Date Created --

Assigned SSA **WALT DISNEY**

Assigned SSA Profile **SSA PROFILE**

Recipient* **WALT DISNEY**

1. Enter the required fields.

2. Must change the recipient to the SSA Supervisor that should receive the notification

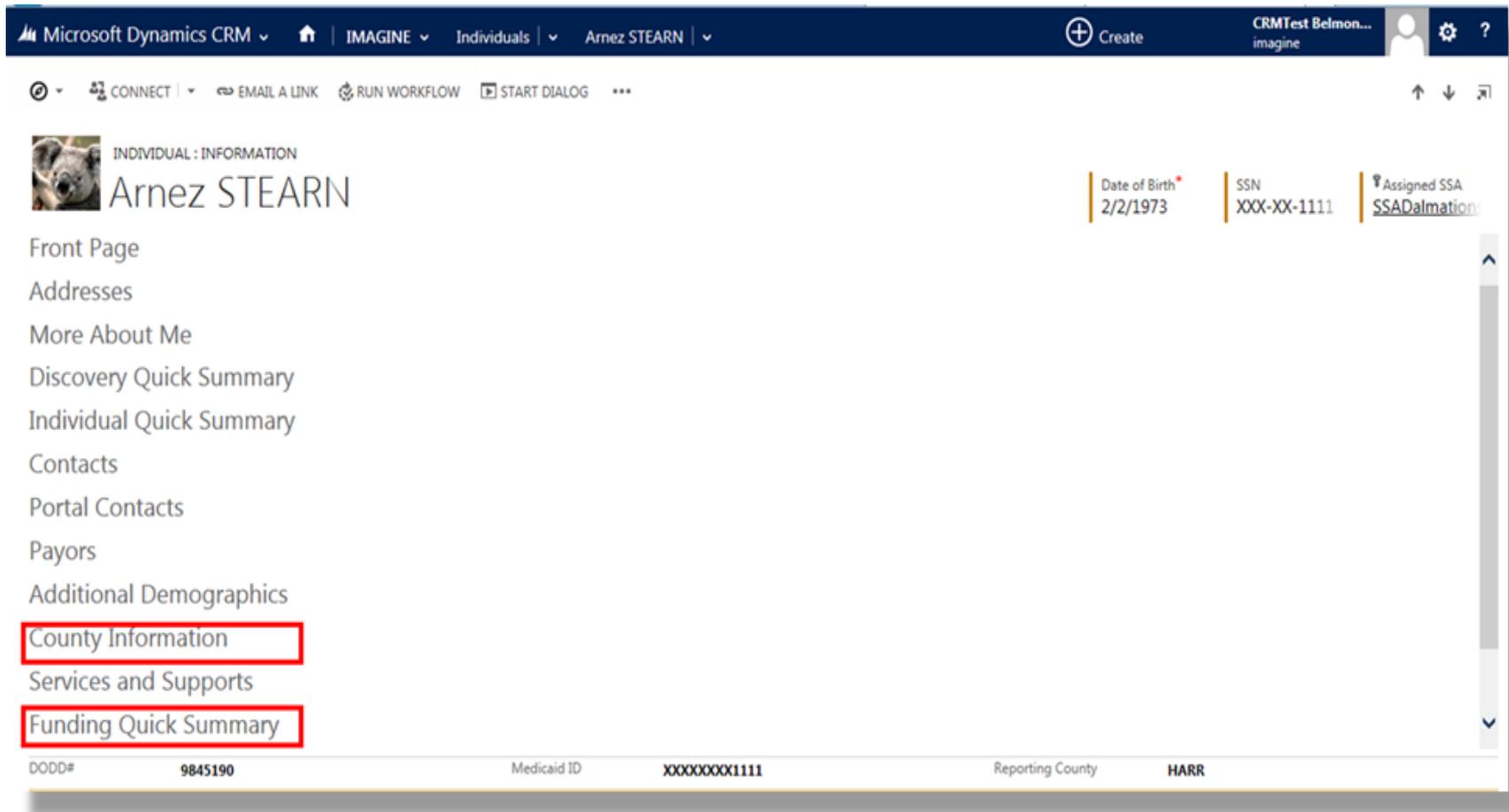
Content

- Overview (What we imagine)
- Create an Individual
- Send notification to SSA Supervisor of new Individual

Individual's Front Page

- County Transfers within imagineIS

Front Page



The screenshot shows the Microsoft Dynamics CRM interface for a user named Arnez STEARN. The top navigation bar includes 'Microsoft Dynamics CRM', 'IMAGINE', 'Individuals', and 'Arnez STEARN'. A 'Create' button is visible on the right. Below the navigation bar, there are action buttons: 'CONNECT', 'EMAIL A LINK', 'RUN WORKFLOW', and 'START DIALOG'. The main content area displays the user's profile information, including a photo of a dog, the name 'Arnez STEARN', and fields for 'Date of Birth' (2/2/1973), 'SSN' (XXX-XX-1111), and 'Assigned SSA' (SSADalmation). A vertical menu on the left lists various options: 'Front Page', 'Addresses', 'More About Me', 'Discovery Quick Summary', 'Individual Quick Summary', 'Contacts', 'Portal Contacts', 'Payors', 'Additional Demographics', 'County Information', 'Services and Supports', and 'Funding Quick Summary'. The 'County Information' and 'Funding Quick Summary' items are highlighted with red boxes. At the bottom, a summary bar shows 'DODD# 9845190', 'Medicaid ID XXXXXXXX1111', and 'Reporting County HARR'.

Microsoft Dynamics CRM | IMAGINE | Individuals | Arnez STEARN | Create | CRMTest Belmon... imagine

CONNECT | EMAIL A LINK | RUN WORKFLOW | START DIALOG

INDIVIDUAL : INFORMATION
Arnez STEARN

Date of Birth 2/2/1973 | SSN XXX-XX-1111 | Assigned SSA SSADalmation

- Front Page
- Addresses
- More About Me
- Discovery Quick Summary
- Individual Quick Summary
- Contacts
- Portal Contacts
- Payors
- Additional Demographics
- County Information
- Services and Supports
- Funding Quick Summary

DODD# 9845190 | Medicaid ID XXXXXXXX1111 | Reporting County HARR

Content

- Overview (What we imagine)
- Create an Individual
- Send notification to SSA Supervisor of new Individual
- Individual's Front Page

County Transfers within imagineIS

County Transfers

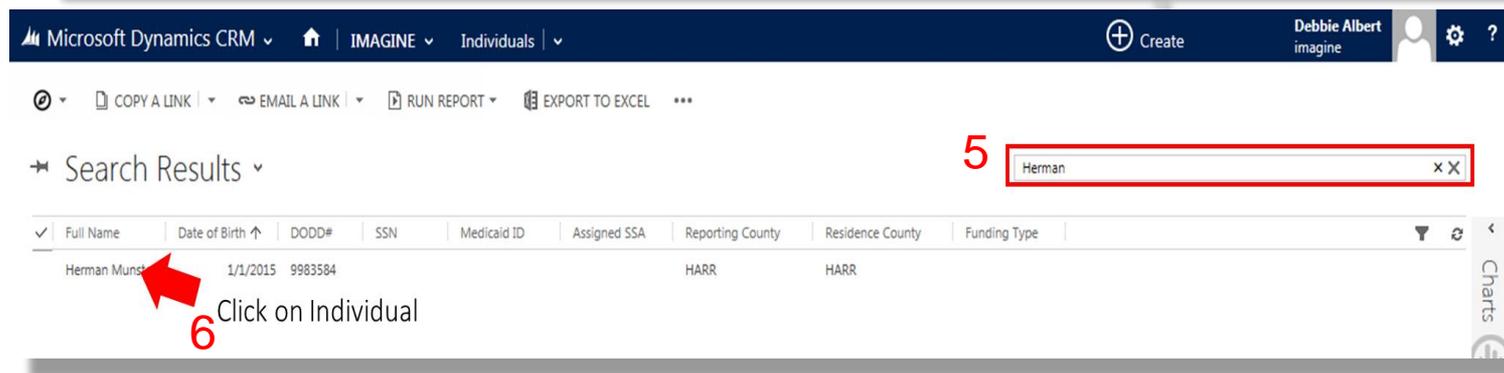
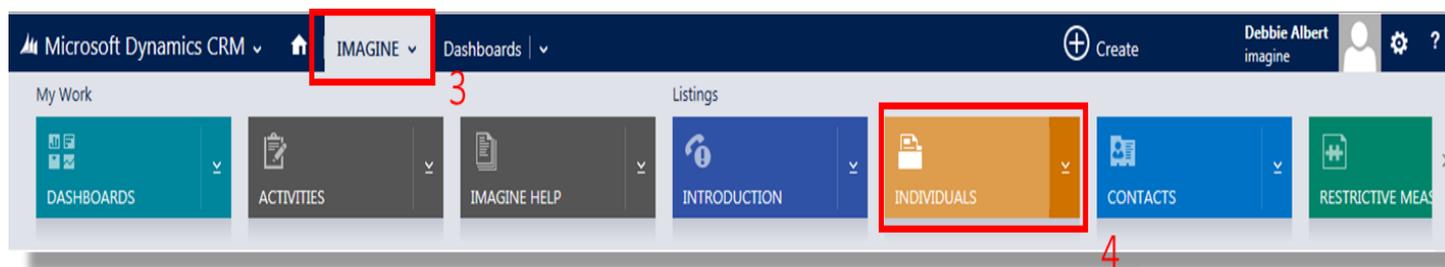
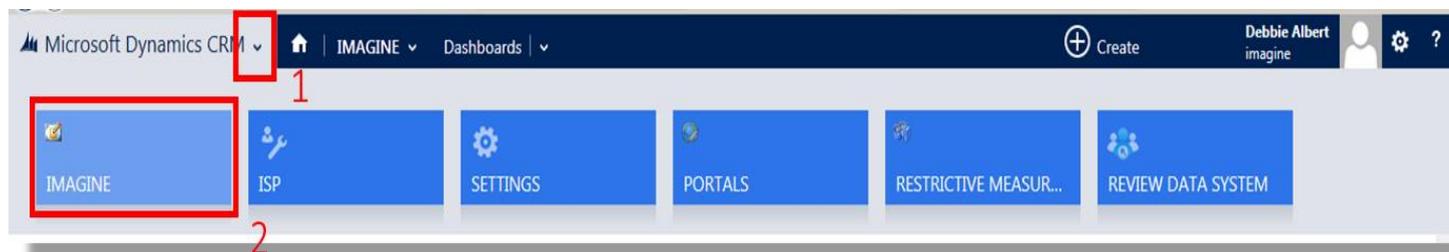
- Transfers are initiated by the “Requesting” county
- Transfers are Approved/Denied by the “Loosing” county

County Transfers (IS to IS Transfers)

Steps to perform (Initiate/Approve) a transfer:

- 1) Select the Home Button
- 2) Select the CRM Link
- 3) Select the IMAGINE Tile
- 4) Select the IMAGINE dropdown
- 5) Select the INDIVIDUALS Tile
- 6) Search for an individual to transfer and click to open their front page
- 7) Click the down arrow next to the Individuals Name
- 8) Select 'INDIVIDUAL'S TRANSFER REQUEST' Tile
- 9) (Loosing County will now approve or deny the transfer request)
- 10) Select Save and Close

County Transfers



County Transfers

This screenshot shows the top navigation bar of Microsoft Dynamics CRM. The breadcrumb trail includes 'Microsoft Dynamics CRM', 'IMAGINE', 'Individuals', and 'Herman Munster'. A red box labeled '1' highlights the 'Herman Munster' dropdown menu. Below the navigation bar, the 'Process Sessions' area contains four tiles: 'RESTRICTIVE MEASURES N...', 'INDIVIDUAL TRANSFER RE...', 'BACKGROUND PROCESSES', and 'REAL-TIME PROCESSES'. A red box labeled '2' highlights the 'INDIVIDUAL TRANSFER RE...' tile.

This screenshot shows the 'Individual : INFORMATION' page for Herman Munster. The page displays personal information such as 'Date of Birth' (1/1/2015), 'SSN' (redacted), and 'Assigned SSA' (redacted). Below this, the 'Individual Transfer Request Associ...' section is visible. A red box labeled '3' highlights the '+ ADD NEW INDIVIDUAL TR...' button. Below the button, a table header is shown with columns: 'Individual', 'Original County', 'County Requesting Trans...', 'Request Date', and 'Status Reason'. A message below the table states 'No Individual Transfer Request records found.'

County Transfers

Select 'Save & Close' to initiate the transfer request.

Individual Transfer Request : INFORMATION

New Individual Transfer Request

Individual
testkal testtho

Individual Transfer Request Information

Reporting County	🔒 BELM	Request Date	🔒 8/20/2015
County Requesting Transfer *	🔒 HARR	Original County Response	🔒 --
Person Requesting Transfer *	🔒 Debbie Albert	Created On	🔒 --
Individual	🔒 testkal testtho		
Status Reason	🔒 Pending		
Person Requesting Transfer from IDS	--		
Tracking Status	🔒 None		

County Transfers

Microsoft Dynamics CRM | HOME | IMAGINE | Individuals | Herman Munster | Create | Debbie Albert imagine

↑ ↓

INDIVIDUAL : INFORMATION
Herman Munster

Date of Birth* 1/1/2015 | SSN -- | Assigned SSA --

Individual Transfer Request Associ...

+ ADD NEW INDIVIDUAL TR... | ADD EXISTING INDIVIDUA... | CHART PANE | RUN REPORT

Individual	Original County	County Requesting Trans...	Request Date	Status Reason
No Individual Transfer Request records found.				

County Transfers (Approve/Deny)

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

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

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

Individual
AME SCHLAG

Individual Transfer Request Information

Reporting County	HARR
County Requesting Transfer*	BELM
Person Requesting Transfer*	CRMTTest BelmontTest
Individual	AME SCHLAG
Status Reason	Pending
Person Requesting Transfer from IDS	--
Tracking Status	None

Request Date	8/22/2015
Original County Response	Approve Deny
Created On	8/22/2015 2:22 PM

County Transfers

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

County Transfers

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.

Questions