



FM - Creating a Local Provider Process

Overview

- imagine Role vs Your Job Title
- Finance Manager Creates Local Provider CEO Role
- CRM Advanced Find

Overview

- imagine Role vs Your Job Title
 - There is no correlation between the role name in ***imaginelS*** and what job title you hold.
 - ***imaginelS*** roles are not your functional job description or title in your organization.
 - There is absolutely no reason to restructure your agency to fit the ***imaginelS*** roles.

Overview

- Finance Manager Creates Local Provider CEO Role
- County Board Role with Finance Manager security access can send an *imaginelS* invitation to the CEO

Overview

- Advanced Find
 - Within CRM you can query the *imaginelS* data using Advanced Find
 - CRM users can look into user records or data records using Advanced Find

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Creating a Local Provider

The screenshot shows the top navigation bar of the Imagine Information System (iS) dashboard. The navigation bar is dark blue and contains several elements: a home icon (labeled 1), the text 'IMAGINE' with a dropdown arrow (labeled 2), and 'Dashboards' with a dropdown arrow. On the right side of the navigation bar, there is a plus sign icon, the user name 'FMDalmations Dog', the user name 'imagine', a profile picture icon, a gear icon for settings, and a question mark icon. Below the navigation bar, there is a row of five tiles: 'CONTACTS' (blue), 'PROVIDERS' (grey, labeled 3), 'CIRCLE OF SUPPORT...' (green), 'DODD APPLICATIONS' (dark grey), and 'DOWNLOAD' (teal). Each tile has a dropdown arrow on its right side.

My Funding Requests

My Service Summaries Pending Approval - Finance

Search for records

| Individual | Name | Status Reason | Total Amount | Individual's Budget Start Date | Individual's Budget End Date ↑ |
|------------|------|---------------|--------------|--------------------------------|--------------------------------|
|------------|------|---------------|--------------|--------------------------------|--------------------------------|

No Service Summary records found.

Creating a Local Provider

+ NEW SEND DIRECT EMAIL EMAIL A LINK RUN WORKFLOW

All Providers

Search for records

| Company Name | Provider/Vendor... | Certification Start Date | Certification End Date | CEO Email Address | CEO First Name | CEO Last Name | |
|----------------------------|--------------------|--------------------------|------------------------|----------------------|----------------|---------------|--------|
| #1 3/27 Sec Demo Test | Waiver Provider | | | | | | |
| #2 4/4 Test Sec Demo | Waiver Provider | | | | | | |
| 001 Memorial Services | Waiver Provider | | | | | | |
| 01 HealthCare Org | Waiver Provider | | | | | | |
| 05 MCaraml Health | Waiver Provider | | | | | | |
| 1 - Harsh T | Waiver Provider | | | | | | |
| 1 Brian test | Waiver Provider | | | | | | |
| 1 LOVING PLACE | Waiver Provider | 8/27/2002 | 2/1/2014 | noisdouglas@yahoo... | | | Active |
| 1.3.31 Sec Test provider | Waiver Provider | | | | | | |
| 10 New harsh final testing | Waiver Provider | | | | | | |
| 1328 Sec Demo Provider | Waiver Provider | | | | | | |
| 142SecTest Provider | Waiver Provider | | | | | | |
| 181 Enterprise | Waiver Provider | 3/26/2013 | 3/25/2014 | enterprise181@yah... | Felicia | Walker | Active |

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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



Creating a Local Provider

Microsoft Dynamics CRM | IMAGINE | Providers | Spark's Local Servic... | Create | FMDalmations Dog imagine

SAVE | SAVE & CLOSE | NEW | EMAIL A LINK

PROVIDER : INFORMATION

Spark's Local Service Provider 1 6/5/2014 #1

General

| | | | |
|-----------------------|--|--------------------------|----|
| Company Name* | Spark's Local Service Provider 1 6/5/2014 #1 | Certification Start Date | -- |
| Provider/Vendor Type* | Waiver Provider ← Local Provider – for local county entry | Certification End Date | -- |
| Provider Type* | -- ← Agency or Independent -This will determine the type of review in RDS | Provider Certified* | -- |
| Operates LF/DC | -- | Last Compliance Review | -- |
| Contract # | -- | | |
| Setup Complete | Yes | | |
| Status | -- | | |

CEO Information

| | | | |
|-------------------|--------|---------------|----|
| CEO First Name | -- | CEO Last Name | -- |
| CEO Email Address | -- | | |
| One Time Pin | 195268 | | |

Provider Address

| | | | |
|-----------------|----|-----------------|----|
| Address 1: Name | -- | City | -- |
| Street 1 | -- | ZIP/Postal Code | -- |
| Street 2 | -- | State/Province | -- |
| Street 3 | -- | Country/Region | -- |

Provider Agent Information

| | | | |
|------------|----|-----------|----|
| First Name | -- | Last Name | -- |
| Email | -- | | |

Creating a Local Provider

Microsoft Dynamics CRM | IMAGINE | Providers | Spark's Local Provid... | Create | FMDalmations Dog imagine

SAVE | SAVE & CLOSE | NEW | EMAIL A LINK | ...

1

2

Start Dialog

Run Report

Send Portal Invitation

PROVIDER : INFORMATION

Spark's Local Provider #5

General

| | | | |
|-----------------------|---------------------------|--------------------------|----------|
| Company Name* | Spark's Local Provider #5 | Certification Start Date | 6/1/2015 |
| Provider/Vendor Type* | Local Provider | Certification End Date | -- |
| Provider Type* | Agency | Last Compliance Review | -- |
| Operates LF/DC | -- | | |
| Contract # | -- | | |
| Setup Complete | Yes | | |
| Status | Active | | |

CEO Information

| | | | |
|-------------------|----------------------------|---------------|--------|
| CEO First Name | Ralph | CEO Last Name | Jones5 |
| CEO Email Address | ralph.jones5@dodd.ohio.gov | | |
| One Time Pin | -- | | |

Provider Address

| | | | |
|-----------------|----|-----------------|----------------------|
| Address 1: Name | -- | City | -- |
| Street 1 | -- | ZIP/Postal Code | -- |
| Street 2 | -- | State/Province | -- |
| Street 3 | -- | Country/Region | <input type="text"/> |

Provider Agent Information

| | | | |
|------------|----------------------------|-----------|--------|
| First Name | Ralph | Last Name | Jones5 |
| Email | ralph.jones5@dodd.ohio.gov | | |

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Temporary PIN email

Verify your email address [UAT]



AgencyIDService@ohio.gov (AgencyIDService@ohio.gov) Add to contacts 5/12/15

Actions ▾

To: P91anv01@outlook.com ✕

Welcome to State of Ohio DODD!

Your Temporary PIN is 214876. ¹

Your request has been approved. In order to create a password, please click the following link:

<https://registerassociate.uatapps.dodd.ohio.gov/VerifyEmail.aspx?objID=385eafad-f942-43a2-9a89-e3282d0b1012&validationCode=15573266> ²

If you have any questions regarding your request please contact our Support Center for assistance.

By email: Security-Support@list.dodd.ohio.gov

Phone: 1-800-617-6733 (Toll Free) between 8.00 a.m. and 4.00 p.m

Select Option 4 for Security Support

- Thank you

Creating Password



Department of
Developmental
Disabilities

OHIO DEPARTMENT OF DEVELOPMENTAL DISABILITIES

USER ACCOUNT REGISTRATION

This form is an essential step in verifying your account request.

Welcome back, CKTestCEO23 Knox01! Not you? Please follow [this link](#) to register your own account.

Please enter the temporary PIN that you received in the email to set your password.

Your password must be a minimum of 8 characters and contain at least one uppercase letter, one lowercase letter, and one special character.

| | |
|---|---|
| Your Temporary PIN: | <input type="text"/> |
| Create your New Password: | <input type="password"/> |
| Retype your New Password: | <input type="password"/> |
| | <input type="checkbox"/> Show Passwords |
| <input type="button" value="Create Your New Password"/> | |

Your Password has to meet following criteria to continue:

- It needs to be at least (8) characters
- It needs to have at least (1) number
- It needs to have at least (1) lower case character
- It needs to have at least (1) upper case character
- It needs to have at least (1) special character from this list: [~ ! @ # \$ % ^ & * _ - + = () { } [] : ; < > , . ? /]

Receiving your User Name

Your Account is Ready [UAT]



AgencyIDService@ohio.gov (AgencyIDService@ohio.gov) Add to contacts 5/12/15

Actions

To: @outlook.com

Welcome to the State of Ohio DODD!

Dear CKTestCEO23 Knox01,

You have successfully created an account with the State of Ohio Department of Developmental Disabilities. At this point you should have already used your PIN and set your system password.

Your new logon name is as follows:

knox01ckt

You may now use the logon name and your password to log onto DODD Systems. Below are the links that you may find useful to begin using your account:

The DODD Portal is located here: [DODD Portal](#). Please be sure to click the logon button from the portal in order to logon.

Please Note: Access to some systems may take approximately 15 minutes to complete. If you are not able to access an application at first please try logging out and logging back in to the DODD Portal before seeking support assistance.

If you have any questions regarding your request please contact our Support Center for assistance.

By email: Security-Support@list.dodd.ohio.gov

Phone: 1-800-617-6733 (Toll Free) between 8.00 a.m. and 4.00 p.m. Select Option 4 for Security Support.

Thank you from the State of Ohio DODD

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CEO Dashboard



CKTestCEO2

Ohio | Department of Developmental Disabilities

CKTestCEO23 Knox01

- Home
- Individuals
- Agreements
- Bill of Rights
- Due Process

Create Delegator

CEO Dashboard for CKTestCEO23 Knox01

Delegators

Search:

| Last Name | First Name | E-mail | Submits POC | Manage |
|-----------|------------|------------------------|--------------------------|----------------------|
| Knox01 | CKTestIDEL | test101ckdel@gmail.com | <input type="checkbox"/> | Edit |

Showing 1 to 1 of 1 entries

◀ Previous Next ▶

Required Documents Here is a checklist of documents that will be required during the compliance review, please have these items available at the beginning of the onsite review. Additional documents may be requested during the onsite review. Depending on the type of waiver and services provided some items will not apply to the review. Please contact the reviewer with any questions prior to the onsite review.

[Checklist](#)

Facilities

[Assign Delegator](#)

[Assign Evaluator](#)

Show entries

Search:

| Facility Name | Type | Status | Facility # | Delegator |
|----------------------------|------|--------|------------|-----------|
| No data available in table | | | | |

Showing 0 to 0 of 0 entries

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Selecting Advanced Find

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... |
|------------|------|-----------------|--------------|------------------------------|------------------------------|
|------------|------|-----------------|--------------|------------------------------|------------------------------|

No Service Summary records found.

Providers Pending Review in My County

Search for records

| Company Name ↑ | Status | Created By |
|----------------|--------|------------|
|----------------|--------|------------|

AAAAA... Pending Review Sultan FMAor...

Advanced Find

Microsoft Dynamics CRM

FMDalmations Dog
imagine

FILE ADVANCED FIND

Query Saved Views Results New Save View Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML

Look for: Accessibility Considerations Use Saved View: [new]

Select

80%

Advanced Find

Microsoft Dynamics CRM

FMDalmations Dog
imagine

FILE ADVANCED FIND

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML

Show View Query Debug

Look for: Providers Use Saved View: [new]

Provider Equals Enter Value

Select

80%

Advanced Find

Microsoft Dynamics CRM

FMDalmations Dog
imagine

FILE ADVANCED FIND

Query Saved Views Results New Save View Clear Group AND Group OR Details Download Fetch XML

Look for: Providers Use Saved View: [new]

Provider Equals CK

Select

80%

Selecting your record

Look Up Records ✕

Enter your search criteria.

Look for ▼

Look in ▼

Search ✕

| ✓ | Company Name... | Provider/Vendor... | Certification Star... | Certification End... | CEO | ↻ |
|---|-----------------|--------------------|-----------------------|----------------------|-----|---|
| | CKTestCEO | Local Provider | 5/3/2015 | | Bob | ⬆ |
| | CKTestCEO2 | Local Provider | 5/1/2015 | 5/31/2015 | Bob | ⬆ |
| | CKTestCEO2 | Local Provider | 5/1/2015 | 5/31/2015 | Bob | ⬇ |

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Selected records:

Advanced Find

SAVE SAVE & CLOSE + NEW EMAIL A LINK

PROVIDER : INFORMATION

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General

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|-----------------------|--|--------------------------|----|
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| Provider Type* | -- | Provider Certified* | -- |
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| Setup Complete | Yes | | |
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| CEO Email Address | -- | | |
| One Time Pin | 195268 | | |

Provider Address

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|-----------------|----|-----------------|----|
| Address 1: Name | -- | City | -- |
| Street 1 | -- | ZIP/Postal Code | -- |
| Street 2 | -- | State/Province | -- |
| Street 3 | -- | Country/Region | -- |

Provider Agent Information

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|------------|----|-----------|----|
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| Email | -- | | |



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Questions ??