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# Provider Portal

July 07, 2015

DODD

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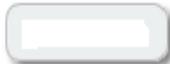
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# CEO Dashboard

CEO User



**Ohio** | Department of  
Developmental Disabilities

Home

Individuals

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Due Process

Create Delegator

## CEO Dashboard for CKTestCEO23 Knox01

Delegators

This will list the Delegators that have been created

Search:

Last Name	First Name	E-mail	Submits POC	Manage
No data available in table				

Showing 0 to 0 of 0 entries

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# Inviting Delegator

CEO User

CKTestCEO2 | Ohio | Department of Developmental Disabilities | CKTestCEO23 Knox01

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

### Create Delegator

- 1 First Name
- 2 Last Name
- 3 E-mail

Submits POC  ⓘ

Create

The email address that is used must be unique, and not used previously

Select POC if you want the Delegator's email to be the Point of Contact for the County Board

# Delegator Listing

CEO User



Imagine Portal

 Create Delegator

## CEO Dashboard for CKTestCEO23 Knox01

Delegators

Search:

Last Name ▲	First Name ◆	E-mail ◆	Submits POC ◆	Manage ◆
DayService	Acme	acme.dayservice@hotmail.com	<input type="checkbox"/>	<a href="#">Edit</a>

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# Delegator Dashboard

Delegator User



CKTestCEO2



Department of  
Developmental Disabilities

Knox01, CKTestDEL

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## Delegator Dashboard

Facilities

Opens Dashboard to  
manage and edit  
Program Managers

Opens Dashboard to  
manage and edit  
Workers

Show 10 entries

Search:

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

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# Program Manager Listing

Delegator User



CKTestCE02

Ohio

Department of  
Developmental Disabilities

Knox01, CKTestDEL

Home

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Due Process

Create Program Manager

This will allow you to create a Program Manager Role

Program Managers

Search:

Last Name	First Name	E-mail	Manage
Knox01	CKTestPM	test101ckpm@gmail.com	Edit

Showing 1 to 1 of 1 entries

Previous Next

# Create Program Manager

Delegator User

## Create Program Manager

First Name

Last Name

E-mail

The email address that is used must be unique, and not used previously

# Updated Program Manager Listing

Delegator User



CKTestCEO2



Department of  
Developmental Disabilities

Knox01, CKTestDEL

Home

Program Managers

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Due Process

Create Program Manager

Program Managers

Search:

Last Name	First Name	E-mail	Manage
Knox01	CKTestPM	test101ckpm@gmail.com	Edit
Ultra	Jergens	jergens.ultra@email.com	Edit

Showing 1 to 2 of 2 entries

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# Program Manager Dashboard

Program Manager User



CKTestCEO2

**Ohio** Department of Developmental Disabilities

Knox01, CKTestPM

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

## Assigned Caseload for Knox01, CKTestPM

### Connected Individuals

Search:

Individual	Picture	Medicaid #	DoDD #	Reporting County	DOB	Assigned SSA	List Of Contacts
------------	---------	------------	--------	------------------	-----	--------------	------------------

No data available in table

Showing 0 to 0 of 0 entries

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### Learning Logs

Search:

Individual	Name	Provider Service	Created On
------------	------	------------------	------------

No data available in table

Showing 0 to 0 of 0 entries

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### Notifications



Search:

Priority	Date & Time	Subject	Individual	Regarding	Action
----------	-------------	---------	------------	-----------	--------

No data available in table

Showing 0 to 0 of 0 entries

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### Alerts



Search:

Priority	Date & Time	Subject	Individual	Regarding	Action
----------	-------------	---------	------------	-----------	--------

No data available in table

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# Create Worker

Delegator User



CKTestCEO2

**Ohio** | Department of  
Developmental Disabilities

Knox01, CKTestDEL ▾

Home Program Managers **Workers** Individuals Agreements Bill of Rights Due Process

Create Worker

Workers Search:

Last Name ▲	First Name ▲	E-mail ▲	Manage ▲
No data available in table			

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# Provider Agency Individuals

Delegator User



CKTestCEO2

Ohio Department of Developmental Disabilities

Knox01, CKTestDEL

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Agency Individuals

Show 10 entries

Search:

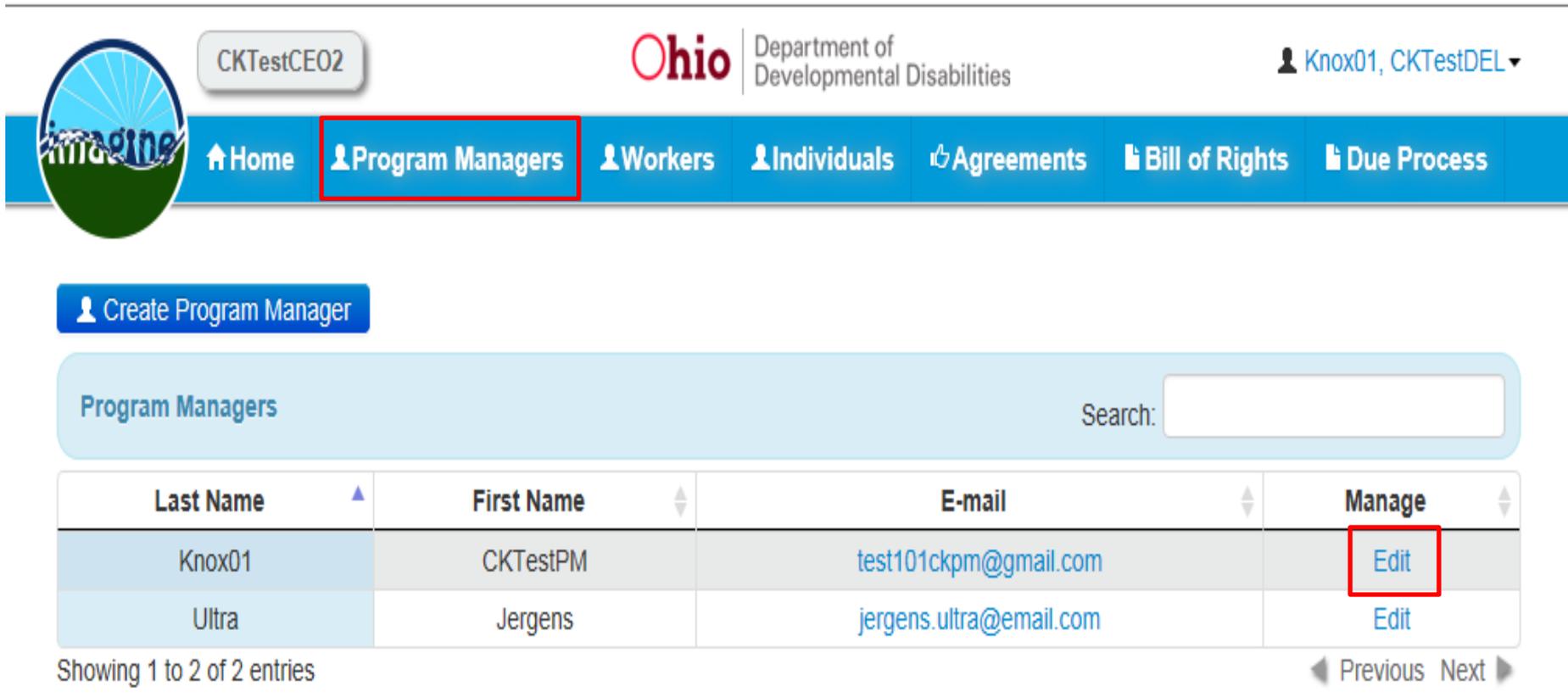
Individual	Medicaid #	DoDD #	Reporting County	DOB	Assigned SSA
Amez STEARN	XXXXXXXX6201	9845190	Harrison	2/2/1973	SSADalmations Dog

Showing 1 to 1 of 1 entries

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# Assigning a Program Manager

Delegator User



The screenshot shows the Ohio Department of Developmental Disabilities web application. The header includes the 'Imagine' logo, the user 'CKTestCEO2', the Ohio Department of Developmental Disabilities logo, and the user 'Knox01, CKTestDEL'. The navigation menu has 'Program Managers' highlighted with a red box. Below the menu is a 'Create Program Manager' button and a search bar. A table lists two program managers: Knox01 (CKTestPM) and Ultra (Jergens). The 'Edit' link for Knox01 is highlighted with a red box. The footer shows 'Showing 1 to 2 of 2 entries' and navigation arrows.

CKTestCEO2

Ohio Department of Developmental Disabilities

Knox01, CKTestDEL

Home Program Managers Workers Individuals Agreements Bill of Rights Due Process

Create Program Manager

Program Managers Search:

Last Name	First Name	E-mail	Manage
Knox01	CKTestPM	test101ckpm@gmail.com	Edit
Ultra	Jergens	jergens.ultra@email.com	Edit

Showing 1 to 2 of 2 entries

Previous Next

# Assign

Delegator User

CKTestCEO2 | Ohio | Department of Developmental Disabilities | Knox01, CKTestDEL

Home | Program Managers | Workers | Individuals | Agreements | Bill of Rights | Due Process

**Edit (CKTestPM Knox01)**

Remove User From Agency

**Unassigned Individuals**

Individual	Medicaid #	DoDD #	Reporting County	DOB	Assigned SSA	
Amez STEARN	>XXXXXXXX6201	9845190	Harrison	2/2/1973	SSADalmations Dog	<b>Assign</b>

**Currently Assigned Individuals**

Individual	Medicaid #	DoDD #	Reporting County	DOB	Assigned SSA	
------------	------------	--------	------------------	-----	--------------	--

- This screen shot displays the dashboard after you select “Program Managers” and select “Edit”.
- This view displays Individuals that are Unassigned.

# Assigned Individuals

Delegator User

CKTestCEO2

Ohio Department of Developmental Disabilities

Knox01, CKTestDEL

Home Program Managers Workers Individuals Agreements Bill of Rights Due Process

## Edit (CKTestPM Knox01)

Remove User From Agency

### Unassigned Individuals

Individual	Medicaid #	DoDD #	Reporting County	DOB	Assigned SSA	
<ul style="list-style-type: none"><li>This screen shot displays the dashboard after you select "Program Managers" and select "Edit".</li><li>This view displays Individuals that have been assigned.</li></ul>						

### Currently Assigned Individuals

Individual	Medicaid #	DoDD #	Reporting County	DOB	Assigned SSA	
Amez STEARN	>XXXXXXXXX6201	9845190	Harrison	2/2/1973	SSADalmations Dog	Unassign

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# Updated Program Manager Dashboard

Program Manager User



CKTestCEO2

**Ohio** | Department of Developmental Disabilities

Knox01, CKTestPM

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## Assigned Caseload for Knox01, CKTestPM

### Connected Individuals

Search:

Individual	Picture	Medicaid #	DoDD #	Reporting County	DOB	Assigned SSA	List Of Contacts
Arnez STEARN		#####6201	9845190	Harrison	2/2/1973	SSADalmations Dog	<a href="#">Contacts</a>

Showing 1 to 1 of 1 entries

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### Learning Logs

Search:

Individual	Name	Provider Service	Created On
No data available in table			

Showing 0 to 0 of 0 entries

Previous Next

### Notifications

Search:

Priority	Date & Time	Subject	Individual	Regarding	Action
0- Green	6/30/2015 3:36 PM	New Assign Team Member	Arnez STEARN	TeamMembers	Mark As Complete
0- Green	6/30/2015 3:36 PM	New Assign Team Member	Arnez STEARN	TeamMembers	Mark As Complete

Showing 1 to 2 of 2 entries

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### Alerts

Search:

Priority	Date & Time	Subject	Individual	Regarding	Action
No data available in table					

Showing 0 to 0 of 0 entries

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# Selecting Action Plan

Program Manager User

 Golf Links LLC  Department of Developmental Disabilities Rollo, Ralph

[Home](#) [Agreements](#) [Search Individuals](#) [Bill of Rights](#) [Due Process](#)

 **Ross A** i

[Profile](#) [Pictures](#) [Documents](#) [Alerts](#) [Notifications](#) [Discovery](#) **Action Plan** [Outcomes](#) [LearningLog](#) [ISP](#) [Agreements](#)

## Action Plan

Individual: Ross A

Assigned SSA:

DODD#:

### General

Current As Of: 6/17/2015

Outcome: Making Friends

Project Outcome Completion: 1/29/2016

Assigned Provider: Golf Links LLC

Module: Relationships

Phase: Active

[Change Phase](#)

Outcome First Active: 11/5/2014

Action Plan Active: 6/17/2015 6:59:01 PM

Action Plan Progress Reporting: Monthly

### Support Consideration

### Action Steps

[+ Create Action Step](#)

Show 25 entries

Search:

	Person responsible for completing the action step	Action Step:How will we accomplish the Outcome?
<a href="#">Edit</a>	Golf LLC	Second Step
<a href="#">Edit</a>	Golf LLC	First Step

Showing 1 to 2 of 2 entries

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This screen shot displays the dashboard of an Individual that was selected from the Program Manger dashboard. After you select the Individual, select "Action Plan". On this dashboard you will have the ability to create or update Action Steps. You also have the ability to change the Phase of an Action Plan.

# Create Action Step

Program Manager User

### Create Action Step

**Action Step: How will we accomplish the Outcome?**

We will purchase new clothes that can be worn

**\* Person responsible for completing the action step:**

Acme Solutions LLC

**Action Step Ended**

**Create** **Cancel**

Fill in the Action Step field and Person responsible for completing the action step field. After the fields are filled in, select "Create". If you have completed the Action Steps, select "Action Step Ended"

# Action Step Added

Program Manager User



Golf Links LLC

Ohio Department of Developmental Disabilities

Rollo, Ralph

Home Agreements Search Individuals Bill of Rights Due Process

Ross A

Profile Pictures Documents Alerts Notifications Discovery **Action Plan** Outcomes

LearningLog ISP Agreements

### Action Plan

Individual: Ross A Assigned SSA: DODD#:

#### General

Current As Of: 6/17/2015 Phase: Active [Change Phase](#)

Outcome: Making Friends Outcome First Active: 11/5/2014

Project Outcome Completion: 1/29/2016 Action Plan Active: 6/17/2015 6:59:01 PM

Assigned Provider: Golf Links LLC Action Plan Progress Reporting: Monthly

Module: Relationships

[Support Consideration](#)

### Action Steps

[+ Create Action Step](#)

Show 25 entries Search:

	Person responsible for completing the action step	Action Step: How will we accomplish the Outcome?
<a href="#">Edit</a>	Acme Solutions LLC	We will purchase new clothes that can be worn
<a href="#">Edit</a>	Golf LLC	Second Step
<a href="#">Edit</a>	Golf LLC	First Step

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# Learning Log

Program Manager User



Golf Links LLC

**Ohio** Department of Developmental Disabilities

Rollo, Ralph

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## Ross A

[Profile](#)
[Pictures](#)
[Documents](#)
[Alerts](#)
[Notifications](#)
[Discovery](#)
[Action Plan](#)
[Outcomes](#)

[LearningLog](#)
[ISP](#)
[Agreements](#)

Debbie Albert

[+ Create Learning Log Entry](#)

### Learning Logs

Search:

	ActionPlan Name	Date of Update	Learning Log Type	Activity(What, Location,When,How Long):	Who was there? (names, others):	What did you try that worked well? What did you learn about what worked? "The Upside of Things"	What did you try that did not work? What was not useful about the activity? What would you try differently?	Name of Person entering information	Service Category
<a href="#">Detail</a>	Making Friends	6/8/2015	Action Plan	This is an acti	All those assoc			Rollo, Ralph	HPC - Routine
<a href="#">Detail</a>	Making Friends	6/5/2015	Action Plan	The Activity wa	John, Randy, Sc	While there we.	We will continu	Rollo, Ralph	Informal Respite
<a href="#">Detail</a>		4/23/2015	New Learning	First Day worki	Jimmy Heartel,	Ross did very w	When Jimmy had	Molly Strader	

Showing 1 to 3 of 3 entries

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# Create Learning Log

Program Manager User



Golf Links LLC

**Ohio** Department of Developmental Disabilities

Rollo, Ralph

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## Ross A

Debbie Albert

Profile | Pictures | Documents | Alerts | Notifications | Discovery | Action Plan | Outcomes

LearningLog | ISP | Agreements

+ Create Learning Log Entry

Learning Logs Search:

	ActionPlan Name	Date of Update	Learning Log Type	Activity(What, Location,When,How Long):	Who was there? (names, others):	What did you try that worked well? What did you learn about what worked? "The Upside of Things"	What did you try that did not work? What was not useful about the activity? What would you try differently?	Name of Person entering information	Service Category
<a href="#">Detail</a>	Making Friends	6/8/2015	Action Plan	This is an acti	All those assoc			Rollo, Ralph	HPC - Routine
<a href="#">Detail</a>	Making Friends	6/5/2015	Action Plan	The Activity wa	John, Randy, Sc	While there we.	We will continu	Rollo, Ralph	Informal Respite
<a href="#">Detail</a>		4/23/2015	New Learning	First Day worki	Jimmy Heartel,	Ross did very w	When Jimmy had	Molly Strader	

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# Learning Log Fields

Program Manager User

Create Learning Log

---

**\* Name**  **Date of Update**

**Learning Log Type**  **Provider Service**

**Action Plan**

**Activity (What, Location, When, How Long?):**

**Who Was there? (Names, Others?):**

**What did you try that worked well? What did you learn about what worked? (The Upside of Things)**

**What did you try that did not work? What was not useful about the activity? What would you try differently?**

# New Learning Type

Program Manager User

**Create Learning Log**

\* Name: Ross A      Date of Update: [ ]

**Learning Log Type**: NewLearning      **Provider Service**: -Select-      *Since this is New Learning, Provider Service is not an active field*

**Action Plan**: -Select-      *Since this is New Learning, Action Plan is not an active field*

**Activity (What, Location, When, How Long?):**  
[ ]

**Who Was there? (Names, Others?):**  
[ ]

**What did you try that worked well? What did you learn about what worked? (The Upside of Things)**  
[ ]

**What did you try that did not work? What was not useful about the activity? What would you try differently?**  
[ ]

**Save**      **Cancel**

# Action Plan Learning Log

Program Manager User

Create Learning Log

\* Name: Ross A      Date of Update:

Learning Log Type: ActionPlan      Provider Service: -Select-

Action Plan: -Select-

Activity (What, Location, When, How Long?):

Who Was there? (Names, Others?):

What did you try that worked well? What did you learn about what worked? (The Upside of Things)

What did you try that did not work? What was not useful about the activity? What would you try differently?

Save      Cancel

*Annotations:*  
Type is Action Plan (points to Learning Log Type)  
Since the Learning Log Type is Action Plan, Provider Service is active (points to Provider Service)  
Since the Learning Log Type is Action Plan, Action Plan is an active field (points to Action Plan)

# Completed Action Plan Learning Log

Program Manager User

**Create Learning Log**

---

**\* Name**                      **Date of Update**  
Ross A                      07/03/2015

**Learning Log Type**                      **Provider Service**  
ActionPlan                      Creative Supports-Business Dev - Training, Co

**Action Plan**  
Making Friends

**Activity (What, Location, When, How Long?):**  
Ross was very excited to meet new people when we went swimming

**Who Was there? (Names, Others?):**  
I was there with Ross and his Mother

**What did you try that worked well? What did you learn about what worked? (The Upside of Things)**  
I let Ross take care of the introductions. He enjoyed this very much.

**What did you try that did not work? What was not useful about the activity? What would you try differently?**  
I tried to introduce people to Ross and this did not work as well

**Save**                      **Cancel**

# Added New Learning Log

Program Manager User



Golf Links LLC

**Ohio** | Department of Developmental Disabilities

Rollo, Ralph

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**Ross A**

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

+ Create Learning Log Entry

## Learning Logs

Search:

	ActionPlan Name	Date of Update	Learning Log Type	Activity(What, Location,When,How Long):	Who was there? (names, others):	What did you try that worked well? What did you learn about what worked? "The Upside of Things"	What did you try that did not work? What was not useful about the activity? What would you try differently?	Name of Person entering information	Service Category
<a href="#">Detail</a>	Making Friends	7/3/2015	Action Plan	Ross was very e	I was there wit	I let Ross take	I tried to intr	Rollo, Ralph	Business Dev - Training, Coaching, Mentoring
<a href="#">Detail</a>	Making Friends	6/8/2015	Action Plan	This is an acti	All those assoc			Rollo, Ralph	HPC - Routine
<a href="#">Detail</a>	Making Friends	6/5/2015	Action Plan	The Activity wa	John, Randy, Sc	While there we.	We will continu	Rollo, Ralph	Informal Respite
<a href="#">Detail</a>		4/23/2015	New Learning	First Day worki	Jimmy Heartel,	Ross did very w	When Jimmy had	Molly Strader	

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# Questions ??