



SSA / SSA Supervisor – Individual Management

Contents

Overview

Setting Direct Reports

Assigning an SSA to an Individual

Individual Front Page

Contacts

Questions

Contents

Overview

Setting Direct Reports

Assigning an SSA to an Individual

Individual Front Page

Contacts

Questions

Overview

- SSA Supervisor / Manager Role in ***imaginelS***
 - Selecting Direct Reports
 - Assigning SSA's to Individuals
- SSA Role in ***imaginelS***
 - Facilitator of DODD services for Individuals
 - Supporting and Active Team Member

Overview

Use the supplied ID's to
Sign on to ***imaginelS***

Contents

Overview

Setting Direct Reports

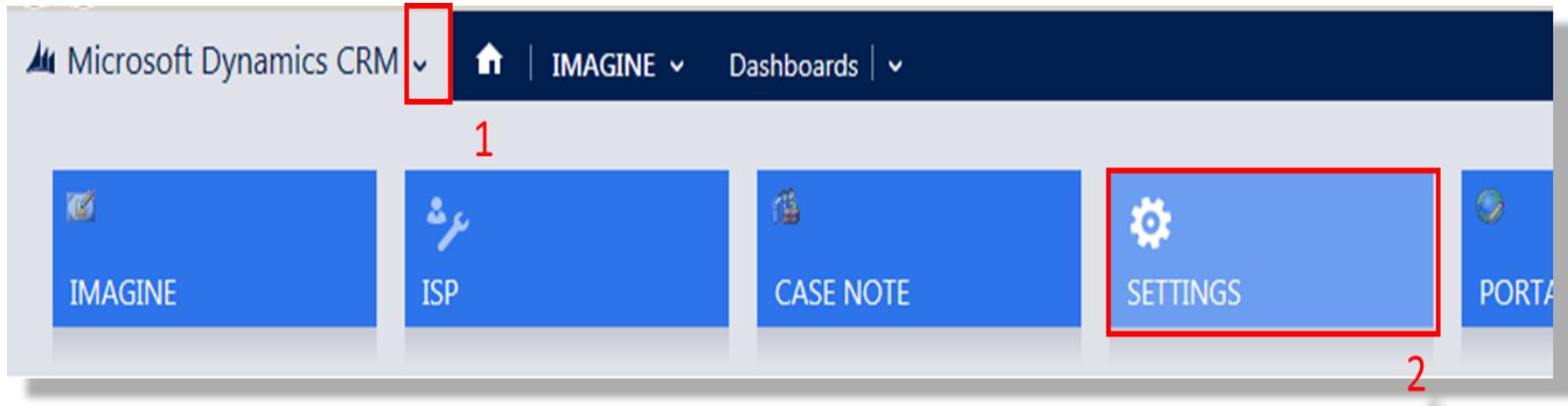
Assigning an SSA to an Individual

Individual Front Page

Contacts

Questions

Setting Direct Reports



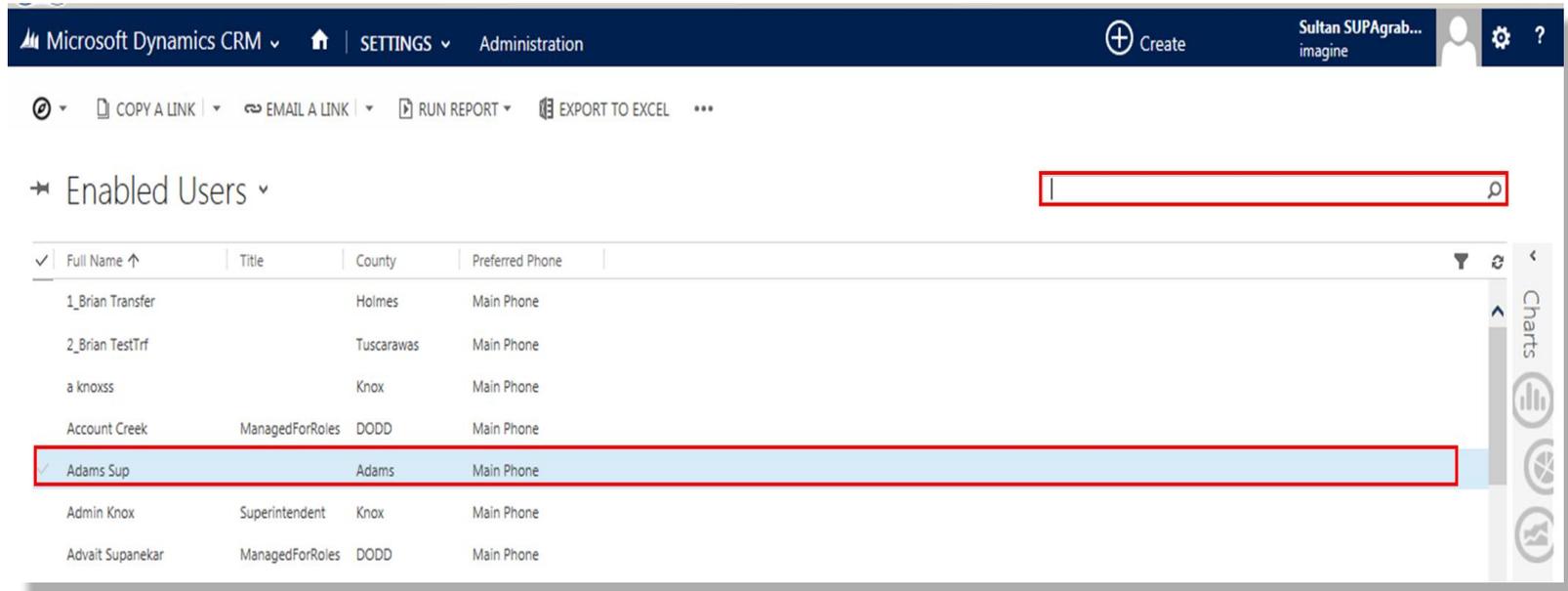
Sign in to **imaginelS** as SSA Supervisor
Click on the Microsoft Dynamics icon in the navigation bar
Click on the Settings Tile

Administration Tile

Microsoft Dynamics CRM Administration interface. The 'SETTINGS' dropdown in the blue ribbon is highlighted with a red box. Below it, the 'ADMINISTRATION' tile in the System group is also highlighted with a red box. Under the Administration tile, the 'Users' link is highlighted with a red box. The interface shows various management options like Business Units, Teams, Access Team Templates, Security Roles, and Users.

Select the SETTINGS drop down in the blue ribbon
Click on the ADMINISTRATION Tile
Click on the Users Link

Selecting the SSA



Microsoft Dynamics CRM Administration interface showing the 'Enabled Users' list. The user 'Adams Sup' is highlighted in blue, indicating selection. A search bar is visible above the list.

Full Name ↑	Title	County	Preferred Phone
1_Brian Transfer		Holmes	Main Phone
2_Brian TestTrf		Tuscarawas	Main Phone
a_knoxss		Knox	Main Phone
Account Creek	ManagedForRoles	DODD	Main Phone
Adams Sup		Adams	Main Phone
Admin Knox	Superintendent	Knox	Main Phone
Advait Supanekar	ManagedForRoles	DODD	Main Phone

Enter the User Name of the SSA in the search field unless already displayed in the list

Click the name of the SSA to open the record

Change Manager

SETTINGS Administration Adams Sup

SAVE SAVE & CLOSE CONNECT CHANGE MANAGER

USER : INFORMATION
Adams Sup

The information provided in this form is viewable by the entire organization.

General

Account Information

User Name * SECTRN\supa

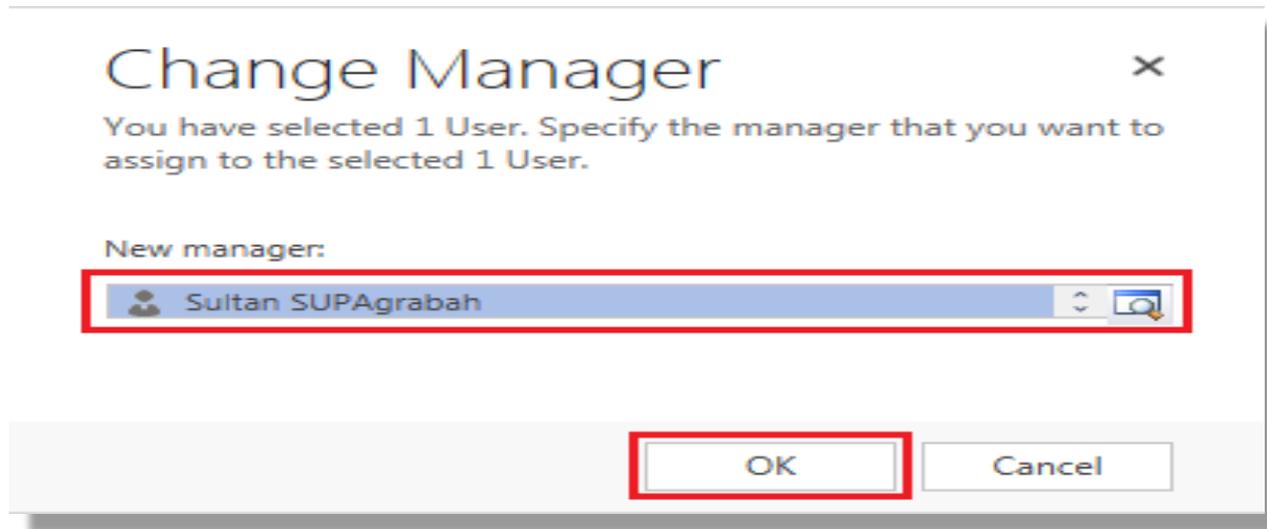
User Information

First Name *	Adams	Main Phone	--
Last Name *	Sup	Other Phone	--
Title	--	Home Phone	--
Primary Email	ids.support@dodd.ohio.gov	Mobile Phone	--
Email 2	--	Preferred Phone	Main Phone
Mobile Alert Email	--	Pager	--
Fax	--		

Status Enabled

Select "CHANGE MANAGER"

New Manager



Type an SSA Supervisor name or search for it
After the SSA Supervisor Name is found, Click OK
Click Save and Close

Contents

Overview

Setting Direct Reports

Assigning an SSA to an Individual

Individual Front Page

Contacts

Questions

SSA Supervisor / Director Caseload Dashboard

Microsoft Dynamics CRM | IMAGINE | Dashboards | Create | SUPDalmations D... imagine

SAVE AS | NEW | REFRESH ALL | ADVANCED FIND

SSA Supervisor/Director Caseload...



Signed in as the SSA Supervisor, select the SSA Supervisor / Director Caseload view Sub-grid

SSA Supervisor Sub-grid Tables

Enabled Users ▼

Search for records



Active Individuals ▼

Search for records



Individuals Pending SSA Assignment ▼

Search for records



The Supervisor Dashboard has multiple List views that you can use to search for information and list information.

Selecting an Individual

Individuals Pending SSA Assignment

Search for records

First Name ↑	Last Name	Nick Name	Date of Birth	DODD#	SSN	Medicaid ID:	Assigned SSA	Reporting Coun...	Residence Coun...
BETHENY	CAIN II		7/10/					HARR	HARR
CATORIA	Titman							HARR	HARR
Chidea	SZIVA		10/25/					HARR	HARR
CHRISTEAN	METROFF III		5/26/					HARR	HARR
CHRISTEAN	Triplett-Boyd		6/7/					HARR	HARR
Clariana	Pilgrim		5/15/					HARR	HARR
Corde	Lallathin		9/13/					HARR	HARR
Coriena	RADIKOVICH		1/5/					HARR	HARR

Select the Individual that you are looking to assign.



Assigning an SSA

Microsoft Dynamics CRM | IMAGINE | Individuals | CATORIA Titman | Create | SUPDalmations D... imagine

SAVE | SAVE & CLOSE | CONNECT | EMAIL A LINK

INDIVIDUAL : INFORMATION
CATORIA Titman

Date of Birth* 11/26/2008 | SSN XXX-XX-359 | Assigned SSA --

Contacts
Portal Contacts
Payors
Additional Demographics

County Information

Enrollment Date --	Termination Date --	Reenrollment Date --	
Residence County HARR	Reporting County* HARR	Waiver County --	
Individual Waiver Type --	Waiver Status --	Waiver Start Date --	Waiver End Date --
Waiver Waiting List (WL) <input type="checkbox"/>	Private Pay Individual (DRA) <input type="checkbox"/>	PASRR Tracking (PTS) <input type="checkbox"/>	Incident Tracking (ITS) <input type="checkbox"/>
Is DOD Source MUI <input type="checkbox"/>	Assigned SSA --		

Click in the Assigned SSA field

Look Up More Records

The screenshot shows a list of users with the following details:

Name	Department
Adams Sup	Adams
Admin Knox Superintendent	Knox
Advait Supanekar ManagedForRoles	DODD
Agree Zigo	Morgan
Aleesa SSASuper_ITR2	Fairfield
ALEESA WOMER	Licking

Below the list is a button labeled "Look Up More Records" and a magnifying glass icon. A red box highlights the "Look Up More Records" button, and another red box highlights the magnifying glass icon with a red arrow pointing to it. The text "10 results" is visible below the list.

Click on the magnifier and scroll to the bottom of the list. Select "Look Up More Records"

Look Up Record

Look Up Record

Enter your search criteria.

Look for
Look in
Search

Type the SSA that you are looking up within the search field. Select the SSA from the results list and select Add.

Full Name ↑	Title	County	Preferred Phon	<input type="button" value="refresh"/>
BSDalmations Dog		Harrison	Main Phone	
FMDalmations Dog		Harrison	Main Phone	
HRCDalmations Dog		Harrison	Main Phone	
Sandy Dogwood		Franklin	Main Phone	
<input checked="" type="checkbox"/> SSADalmations Dog		<u>Harrison</u>	Main Phone	
SUPDalmations Dog		Harrison	Main Phone	

1 - 6 of 6 (1 selected)

Page 1

Assigned SSA

Microsoft Dynamics CRM | HOME | IMAGINE | Individuals | CATORIA Titman | Create | SUPDalmations D... imagine

SAVE | **SAVE & CLOSE** | CONNECT | EMAIL A LINK

INDIVIDUAL : INFORMATION
CATORIA Titman

Date of Birth* 11/26/2008 | SSN XXX-XX-359 | **Assigned SSA SSADalmatic**

Contacts
Portal Contacts
Payors
Additional Demographics
County Information

Enrollment Date	Termination Date	Reenrollment Date
--	--	--
Residence County	Reporting County*	Waiver County
HARR	HARR	--
Individual Waiver Type	Waiver Status	Waiver Start Date
--	--	--
Waiver Waiting List (WL)	Private Pay Individual (DRA)	PASRR Tracking (PTS)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is DOD Source MUI	Date Of Death	IDS Living Arrangement
<input type="checkbox"/>	*****	--
Assigned SSA		Special Category
SSADalmations Dog		--

Contents

Overview

Setting Direct Reports

Assigning an SSA to an Individual

Individual Front Page

Contacts

Questions

Demographics

Microsoft Dynamics CRM | IMAGINE | Individuals | MINNIE MOUSE | Create | WALT DISNEY imagine

SAVE | SAVE & CLOSE | CONNECT | EMAIL A LINK

INDIVIDUAL : INFORMATION
MINNIE MOUSE

Date of Birth* 3/29/1934 | SSN XXX-XX-023 | Assigned SSA WALT DISN

What Other People Like And Admire About Me
PEOPLE LIKE MY PRETTY HAIR BOWS AND ADMIRE MY HONESTY

What I'm Interested In Doing
I LIKE SINGING AND DANCING!!!

Important People In My Life
MY MOM AND DAD ARE IMPORTANT TO ME AND MY DOG PLUTO

DODD# 9019949 | Medicaid ID XXXXXXXX0301 | Reporting County HARR

Active | unsaved changes

Demographics

Microsoft Dynamics CRM | IMAGINE | Individuals | MINNIE MOUSE | Create | WALT DISNEY imagine

SAVE | SAVE & CLOSE | CONNECT | EMAIL A LINK

INDIVIDUAL : INFORMATION

MINNIE MOUSE

Date of Birth* 3/29/1934 | SSN XXX-XX-023 | Assigned SSA WALT DISNEY

Nick Name	--	Email	--
First Name*	MINNIE	Date Of Birth*	3/29/1934
Middle Name	--	Age	--
Last Name*	MOUSE	Full Name	MINNIE MOUSE
Generation	--		

Phone Information

Home Phone	--	Home Ext.	--	Mobile Phone	--
Work Phone	--	Work Ext.	--		
Other Phone Type	--	Other Phone	--	Other Ext.	--

Essential Health Indicators

DODD# 9019949 | Medicaid ID XXXXXXXX0301 | Reporting County HARR

Active | unsaved changes

Addresses – Residence Address

The screenshot shows the Microsoft Dynamics CRM interface for a record named 'MINNIE MOUSE'. The top navigation bar includes 'Microsoft Dynamics CRM', 'IMAGINE', 'Individuals', and 'MINNIE MOUSE'. The right side of the bar shows a 'Create' button and the user 'WALT DISNEY imagine'. Below the navigation bar, there are action buttons: 'SAVE', 'SAVE & CLOSE', 'CONNECT', and 'EMAIL A LINK'. The main content area features a profile picture of Minnie Mouse, the text 'INDIVIDUAL : INFORMATION MINNIE MOUSE', and three data fields: 'Date of Birth*' (3/29/1934), 'SSN' (XXX-XX-023), and 'Assigned SSA' (WALT DISNEY). Below this, there are tabs for 'Front Page' and 'Case Notes'. The 'Addresses' tab is highlighted with a red border and contains a table with columns: 'Address Type ↑', 'Description', 'DODD Facility', 'DODD Address', 'Address Effectiv...', and 'Address Effectiv...'. The table is currently empty, with the text 'No Individual Address records found.' below it. At the bottom of the interface, there are fields for 'DODD#' (9019949), 'Medicaid ID' (XXXXXXXX0301), and 'Reporting County' (HARR). The status is 'Active' and there are 'unsaved changes'.

Microsoft Dynamics CRM | IMAGINE | Individuals | MINNIE MOUSE | Create | WALT DISNEY imagine

SAVE | SAVE & CLOSE | CONNECT | EMAIL A LINK

INDIVIDUAL : INFORMATION
MINNIE MOUSE

Date of Birth* 3/29/1934 | SSN XXX-XX-023 | Assigned SSA WALT DISNEY

Front Page
Case Notes
Addresses

Current Addresses +

Address Type ↑	Description	DODD Facility	DODD Address	Address Effectiv...	Address Effectiv...
No Individual Address records found.					

DODD# 9019949 | Medicaid ID XXXXXXXX0301 | Reporting County HARR

Active | unsaved changes

Addresses – End/Replace Address

The screenshot displays the Microsoft Dynamics CRM interface for an individual address. The breadcrumb navigation shows 'Microsoft Dynamics CRM > IMAGINE > Individuals > DISNEYLAND'. The user is logged in as 'WALT DISNEY imagine'. The page title is 'INDIVIDUAL ADDRESS : INFORMATION' and the address name is 'DISNEYLAND'. A message states 'No Individual Foster Care Address records found.' The 'Address Dates' section shows 'Address Effective Begin Date' as 6/30/2015 and 'Address Effective End Date' as 12/31/2015, with the latter highlighted by a red box. The status is 'Active'. The bottom right corner shows 'unsaved changes'.

Microsoft Dynamics CRM | IMAGINE | Individuals | DISNEYLAND | Create | WALT DISNEY imagine

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

INDIVIDUAL ADDRESS : INFORMATION
DISNEYLAND

No Individual Foster Care Address records found.

Individual
MINNIE MC

Address Dates

Address Effective Begin Date*	Address Effective End Date
6/30/2015	12/31/2015

Status: **Active**

Active | unsaved changes

Inviting an Individual

The screenshot shows the Microsoft Dynamics CRM interface for a record named 'MINNIE MOUSE'. The navigation bar at the top includes 'Microsoft Dynamics CRM', 'IMAGINE', 'Individuals', and 'MINNIE MOUSE'. A 'Create' button is visible on the right. The record details include a Minnie Mouse profile picture, the name 'MINNIE MOUSE', and fields for 'Date of Birth' (3/29/1934), 'SSN' (XXX-XX-023), and 'Assigned SSA' (WALT DISN). A context menu is open over the record, with the 'Create Invitation Code' option highlighted in a red box. Other menu items include 'Run Workflow', 'Start Dialog', 'Run Report', and 'Other Activities'. The 'Front Page' section shows the owner as 'Harrison Ownership Team' and the current user as '6/30/2015'. The profile picture is a Minnie Mouse head with a pink polka-dot bow. The bio section contains the following text: 'What Other People Like And Admire About Me: PEOPLE LIKE MY PRETTY HAIR BOWS AND ADMIRE MY HONESTY', 'What I'm Interested In Doing: I LIKE SINGING AND DANCING!!!', and 'Important People In My Life: MY MOM AND DAD ARE IMPORTANT TO ME AND MY DOG PLUTO'. At the bottom, there is a table with the following data:

DODD#	9019949	Medicaid ID	XXXXXXXX0301	Reporting County	HARR
Active					

Pictures

Microsoft Dynamics CRM | ISP | Individuals | MINNIE MOUSE | Create | WALT DISNEY imagine

SAVE | SAVE & CLOSE | CONNECT | EMAIL A LINK

INDIVIDUAL : INFORMATION
MINNIE MOUSE

Date of Birth* 1/1/2001 | SSN XXX-XX-023 | Assigned SSA WALT DISNEY

Pictures

Notes

NOTES

Attach Done

ISP - Draft Distributed.pdf

DODD#	9019949	Medicaid ID	XXXXXXXX0301	Reporting County	HARR
-------	---------	-------------	--------------	------------------	------

Active

More About Me

Microsoft Dynamics CRM | IMAGINE | Individuals | MINNIE MOUSE | Create | WALT DISNEY imagine

SAVE | SAVE & CLOSE | CONNECT | EMAIL A LINK

INDIVIDUAL : INFORMATION
MINNIE MOUSE

Date of Birth* 1/1/2001 | SSN XXX-XX-023 | Assigned SSA WALT DISNEY

More About Me



Profile Picture

Contents

Overview

Setting Direct Reports

Assigning an SSA to an Individual

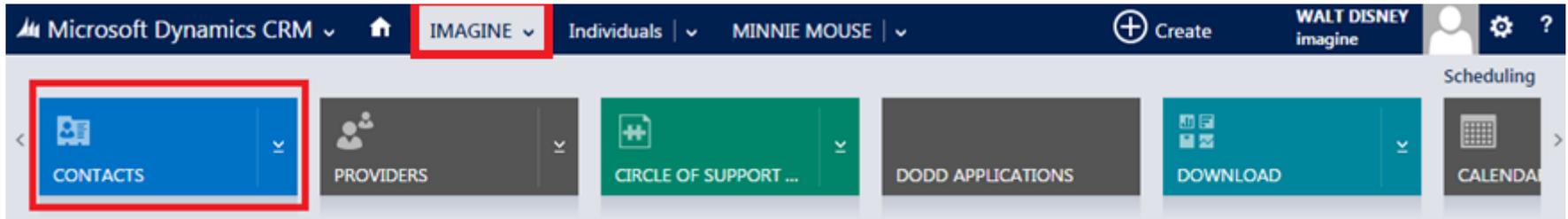
Individual Front Page

Contacts

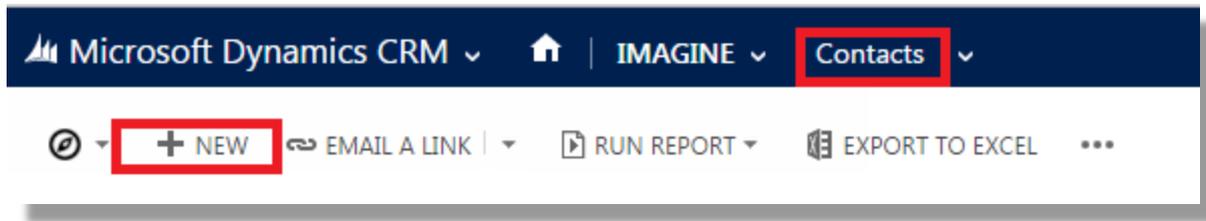
Questions

Create a Contact

- From the **imagineIS** menu dropdown select Contacts



- Click +New Contact



New Contact Details

Microsoft Dynamics CRM | IMAGINE | Contacts | New Contact | Create | WALT DISNEY imagine

CONTACT : INFORMATION
New Contact

Primary Phone Num: -- | Logon Enabled: No

General

Portal Contact Type*	Other	Primary Phone Number	
Salutation	--	Secondary Phone Number	
First Name	--	Mobile Phone	
Middle Name	--	Fax	
Last Name*	--	Email	--
Agency Name	--		
Job Title	--		

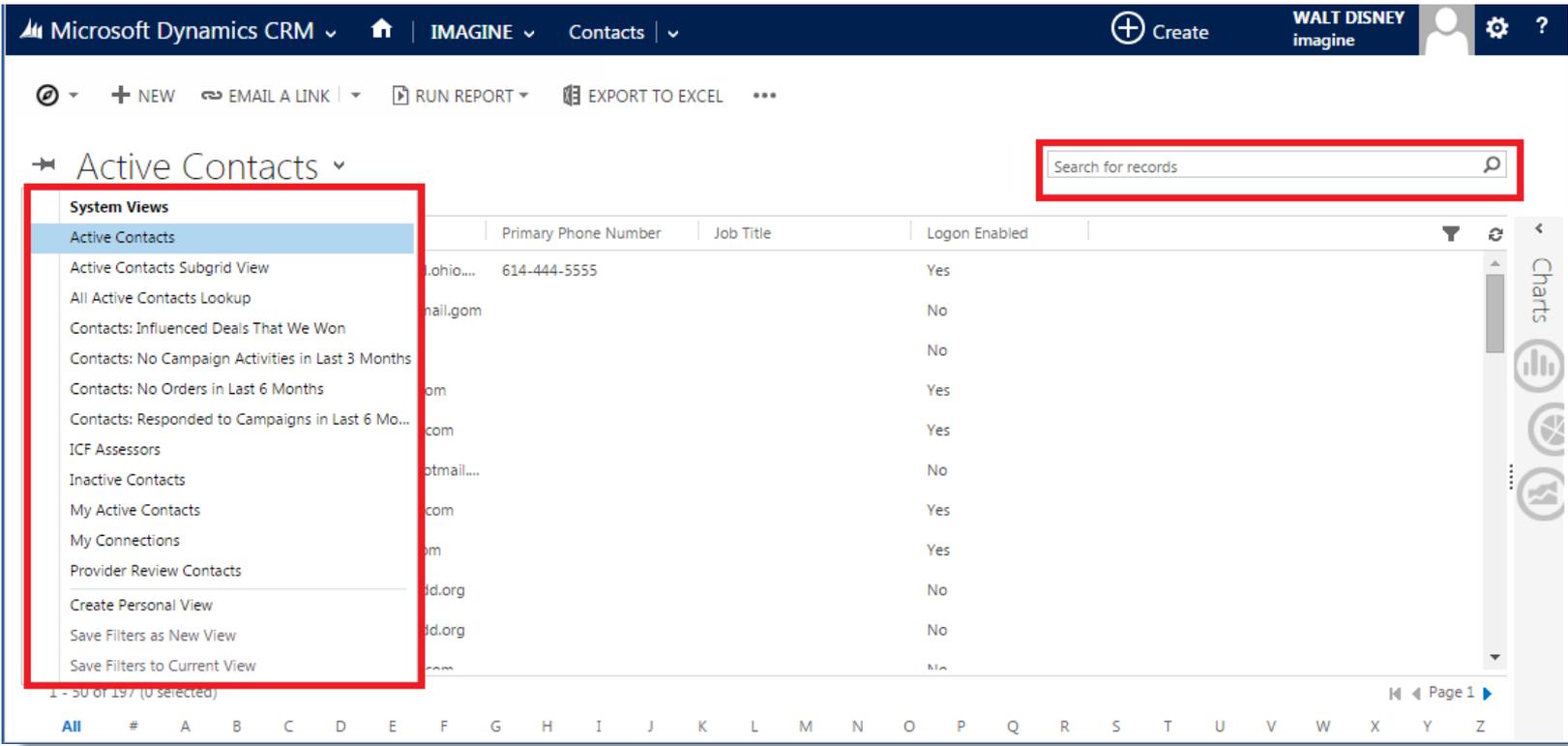
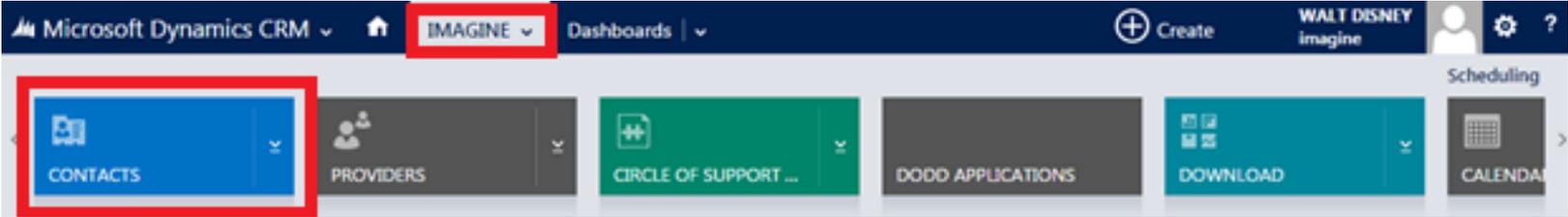
Address

Address 1: Address Type	--	Address 1: City	--
Address 1: Name	--	Address 1: State/Province	--

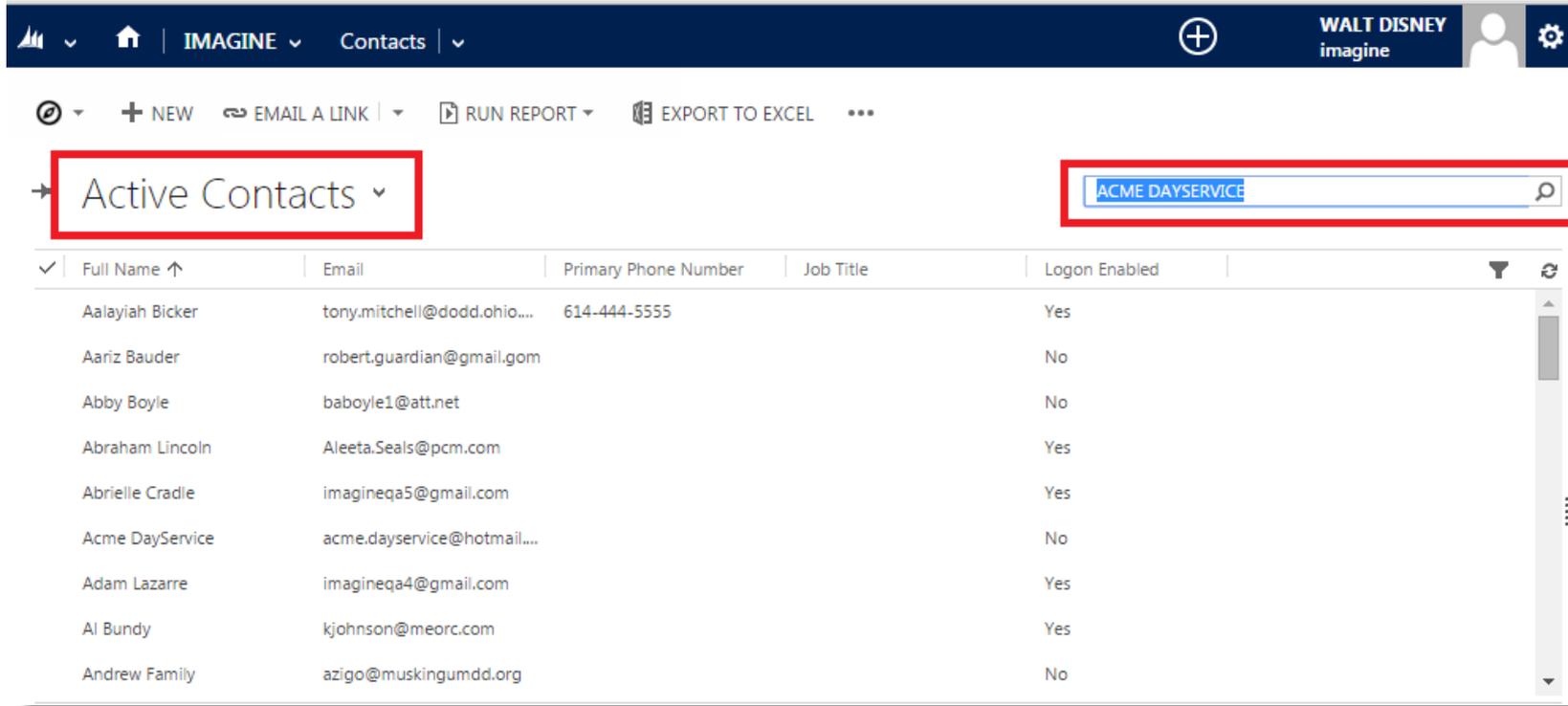
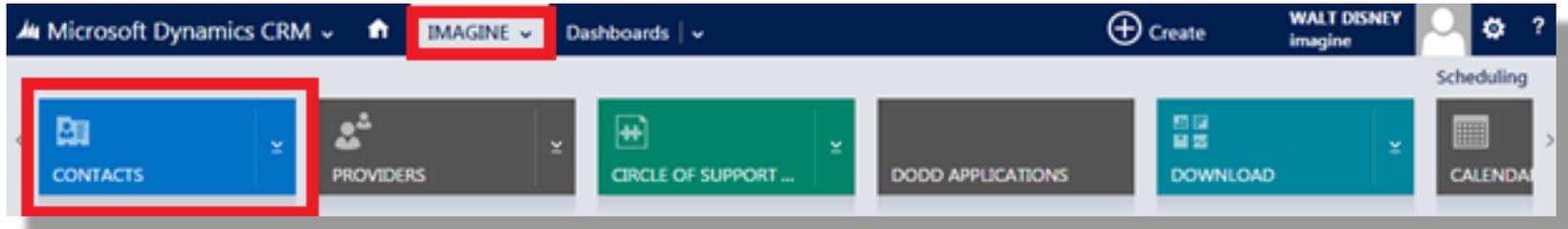
Active

Select to enter data

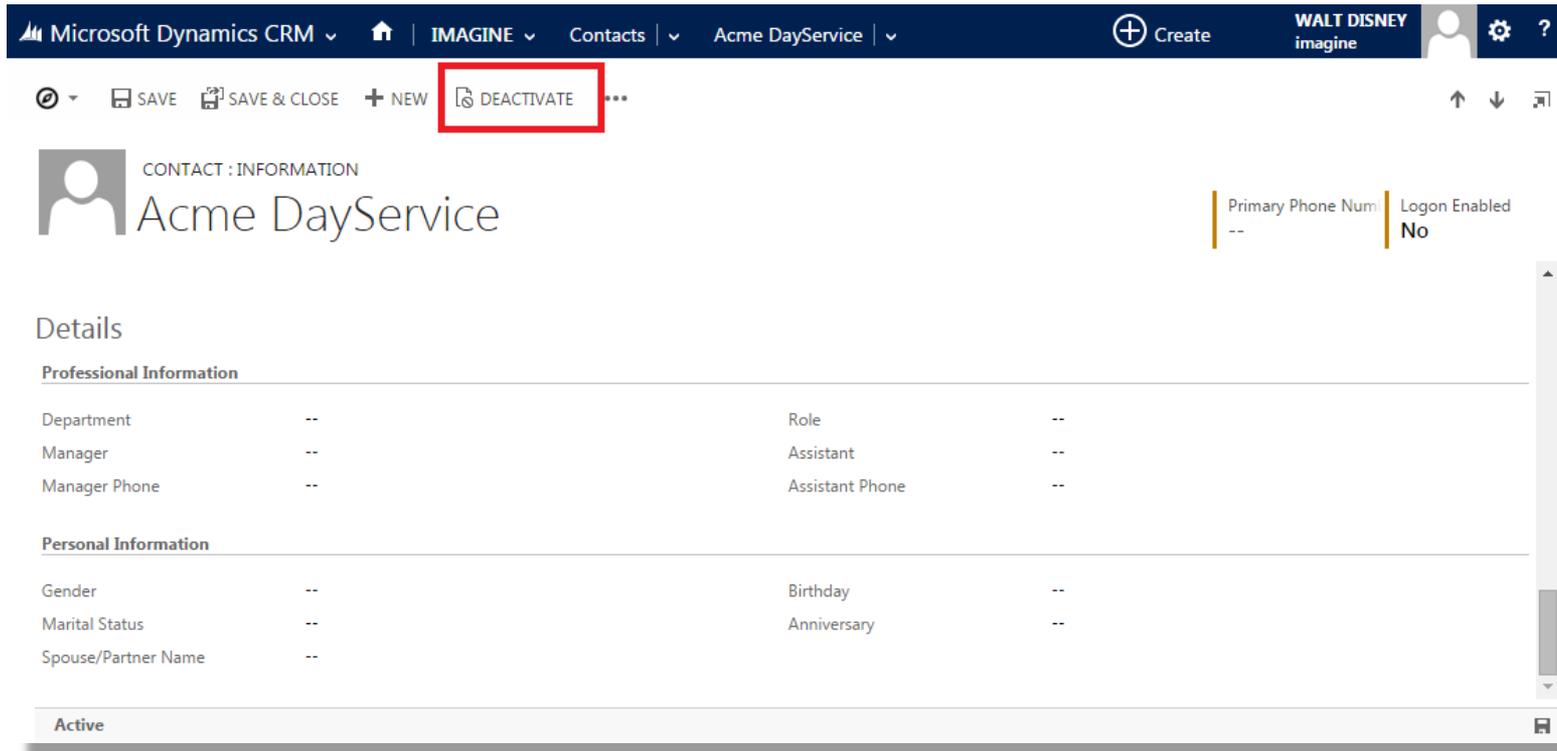
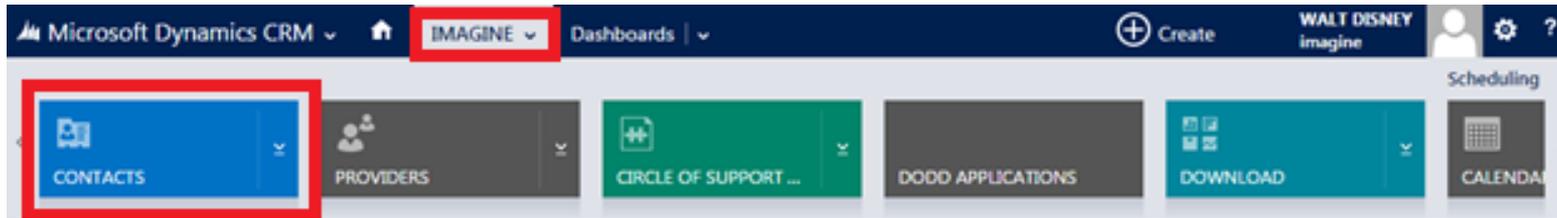
Search Contacts



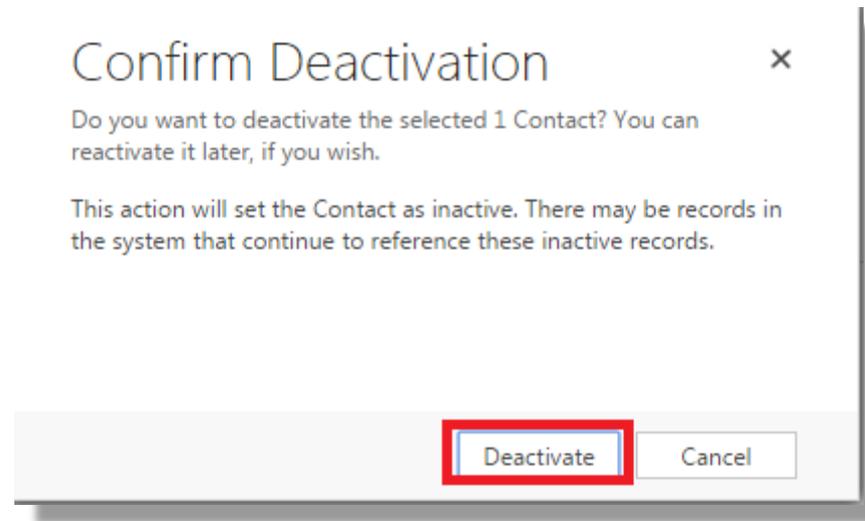
Deactivate a Contact



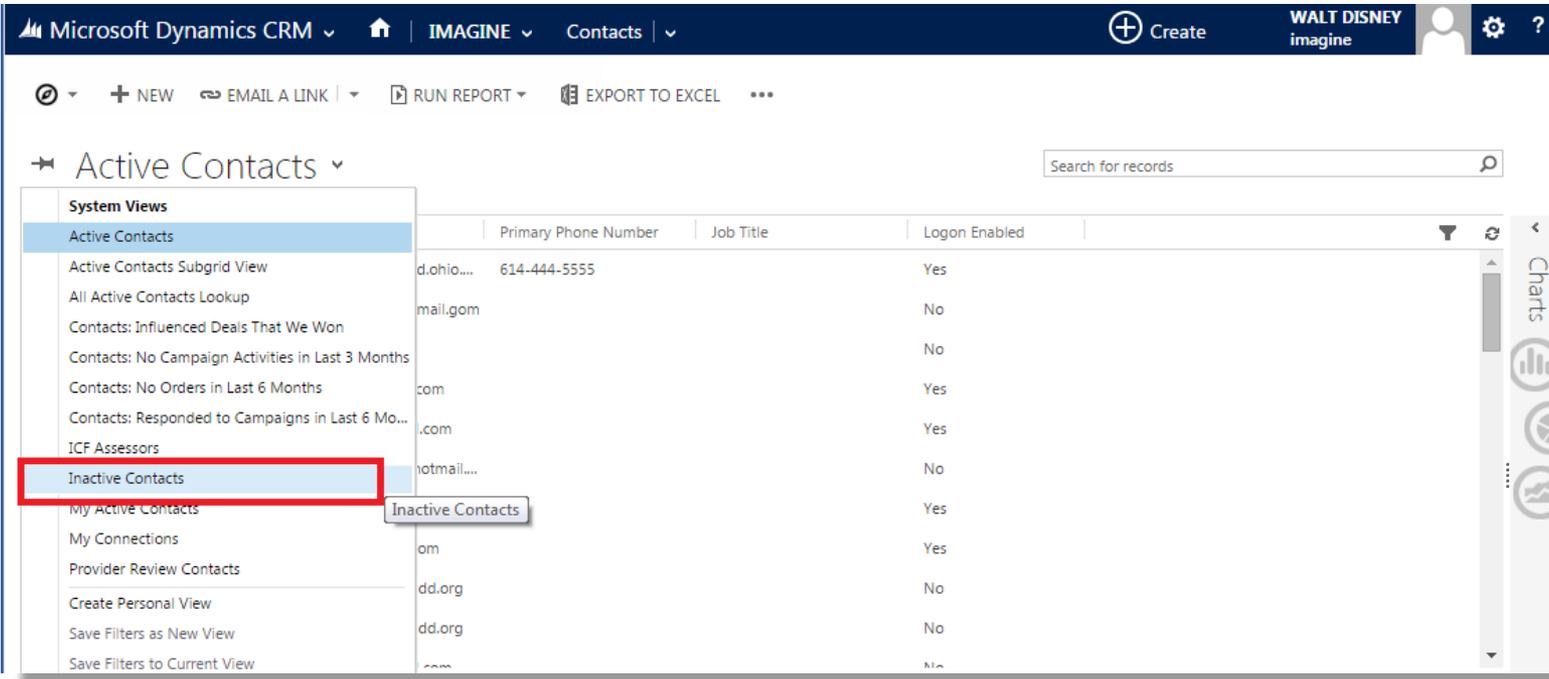
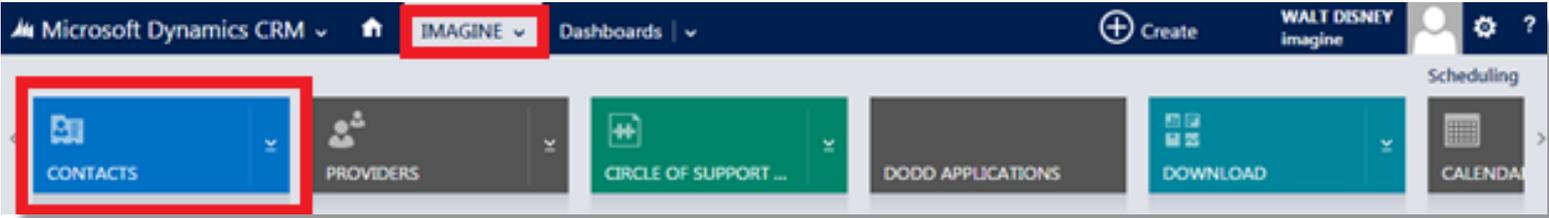
Deactivate a Contact



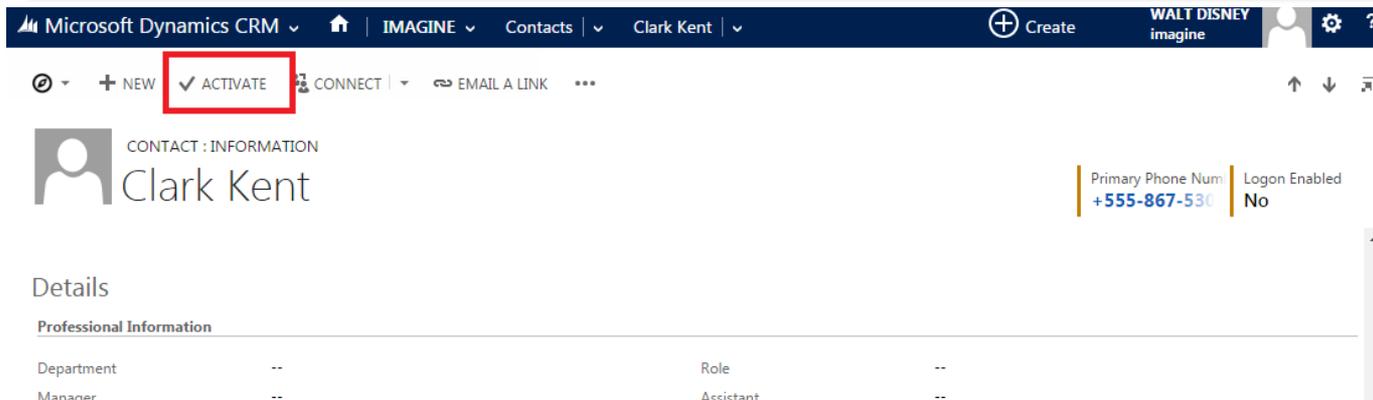
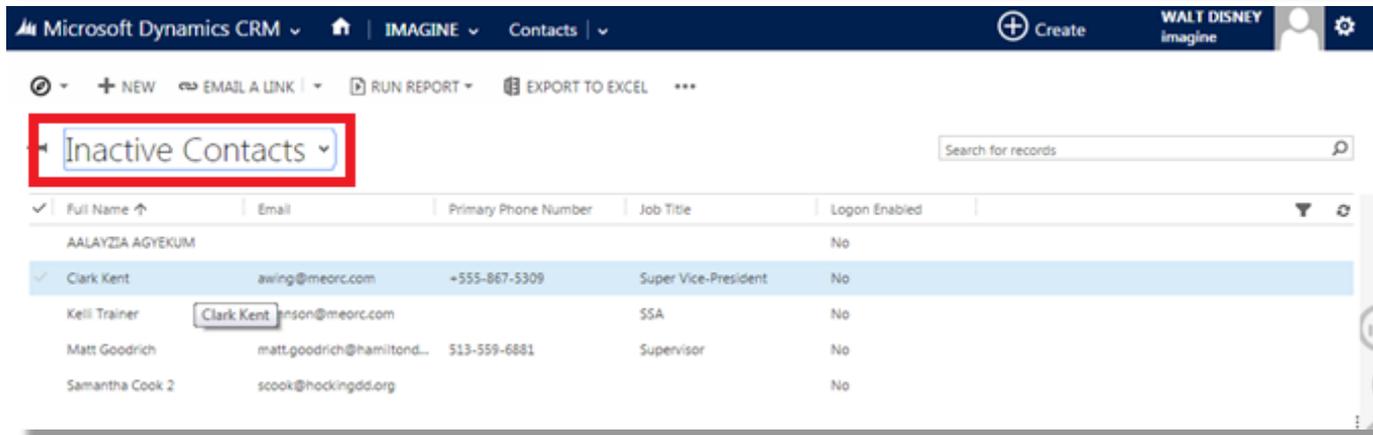
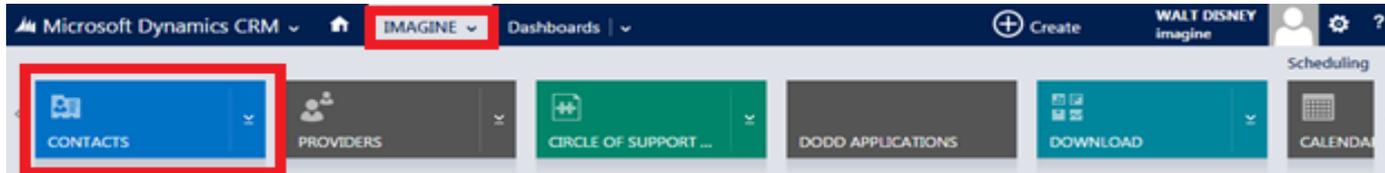
Deactivate a Contact



Search for inactive Contact



Activate a Contact



Making a Connection

The screenshot shows the Microsoft Dynamics CRM interface for a user named Mickey Mouse. The top navigation bar includes 'Microsoft Dynamics CRM', 'IMAGINE', 'Individuals', and 'MICKEY MOUSE'. A 'CONNECT' button is highlighted with a red box. The user's profile information is displayed, including a Mickey Mouse avatar, the name 'MICKEY MOUSE', and fields for Date of Birth (2/1/2001), SSN (XXX-XX-334), and Assigned SSA (WALT DISN). The user's current status is 'Active' as of 6/30/2015. The profile includes sections for 'What Other People Like And Admire About Me' (PEOPLE LIKE MY SMILE AND ADMIRE MY HONESTY), 'What I'm Interested In Doing' (I AM INTERESTED IN HORESBACK RIDING AND ARCHERY), and 'Important People In My Life' (MY MOM, DAD AND SIBLINGS. MY UNCLE JOE AND AUNT ALICE). A table at the bottom shows the user's DODD# (9416091), Medicaid ID (XXXXXXXX7501), and Reporting County (HARR).

Microsoft Dynamics CRM | IMAGINE | Individuals | MICKEY MOUSE | Create | WALT DISNEY imagine

SAVE | SAVE & CLOSE | **CONNECT** | EMAIL A LINK

INDIVIDUAL : INFORMATION
MICKEY MOUSE

Date of Birth* 2/1/2001 | SSN XXX-XX-334 | Assigned SSA WALT DISN

Current As Of 6/30/2015

What Other People Like And Admire About Me
PEOPLE LIKE MY SMILE AND ADMIRE MY HONESTY

What I'm Interested In Doing
I AM INTERESTED IN HORESBACK RIDING AND ARCHERY

Important People In My Life
MY MOM, DAD AND SIBLINGS. MY UNCLE JOE AND AUNT ALICE

DODD#	9416091	Medicaid ID	XXXXXXXX7501	Reporting County	HARR
-------	---------	-------------	--------------	------------------	------

Active

Making a Connection

The screenshot shows a software interface for creating a new connection. The top ribbon includes tabs for 'FILE' and 'CONNECTION'. The 'CONNECTION' tab is active, showing options like 'Save', 'Save & Close', 'Save & New', 'Sharing', 'Copy a Link', 'Email a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. Below the ribbon, the main area is titled 'New Connection' and contains a form for 'MICKEY MOUSE'. The form includes fields for 'Team Member' (MINNIE MOUSE), 'Team Membership Relationship' (Assigned Team Member), 'Start Date' (7/2/2015), 'End Date', 'Relationship', 'Guardian Type' (Guardian of the Person), 'Letter of Guardianship On File' (Yes/No), and 'Description'. The 'Emergency Contact' field is highlighted with a red box, showing radio buttons for 'Yes' and 'No', with 'No' selected. The 'Status' is set to 'Active'.

FILE CONNECTION

Save Save & Close Save & New Sharing - Copy a Link Email a Link Run Workflow Start Dialog Run Report -

Save Collaborate Process Data

Connection Connections

New Connection

MICKEY MOUSE

Connect To

Team Member MINNIE MOUSE Contact Type * 2 - Guardian

Team Membership Relationship * Assigned Team Member Emergency Contact Yes No

Start Date * 7/2/2015 End Date

Relationship

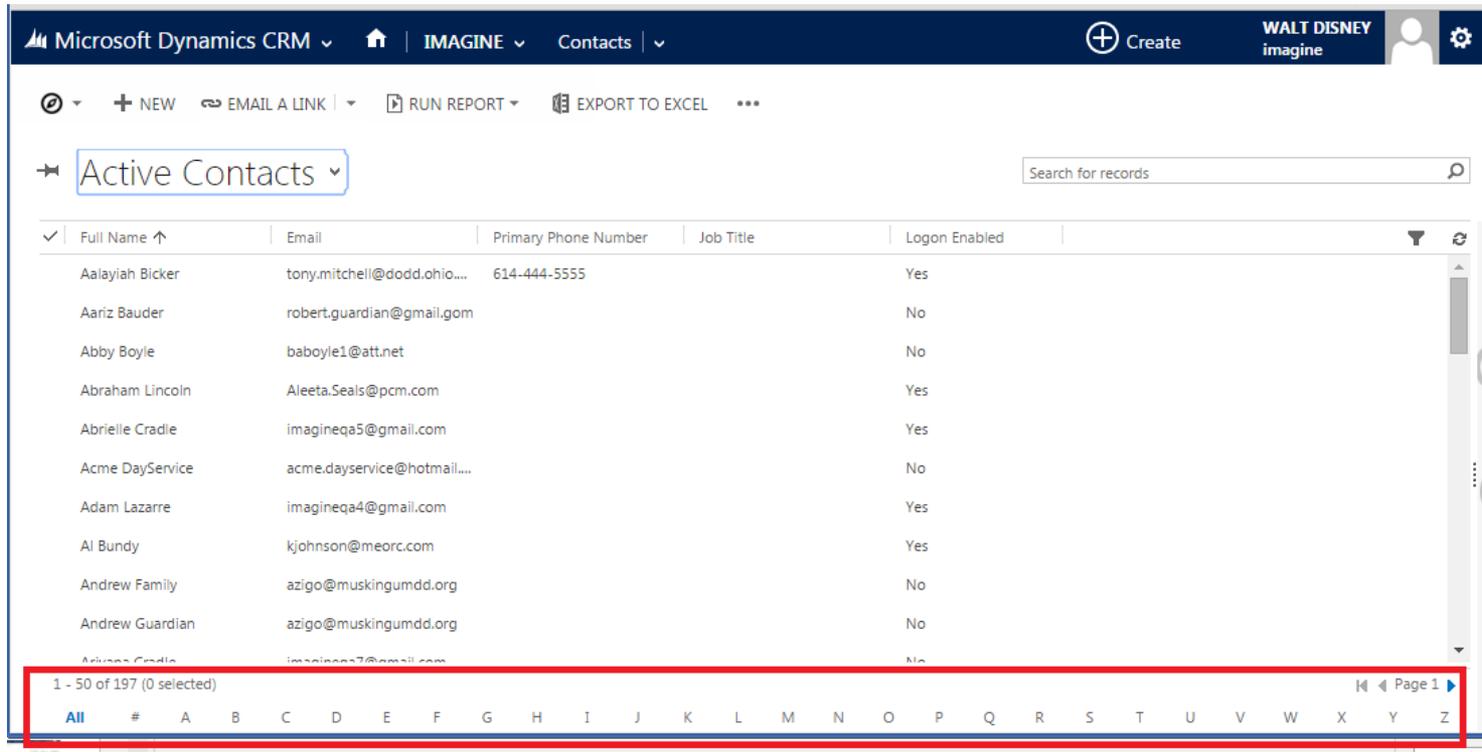
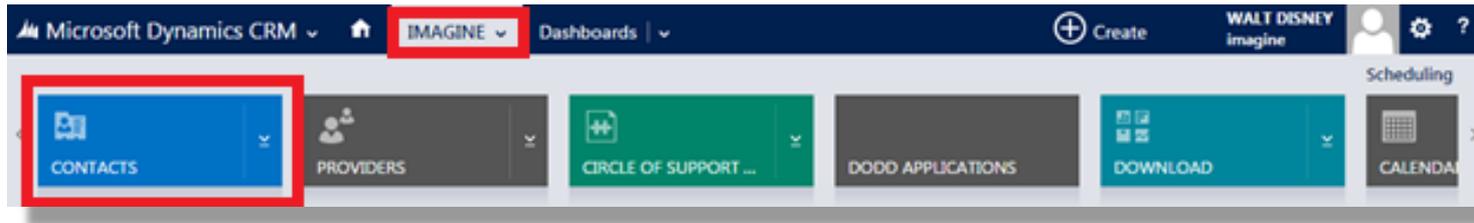
Guardian Type Guardian of the Person If Limited, Please Specify

Letter of Guardianship On File Yes No

Description

Status Active

View Active Contacts



Emergency Contacts

Microsoft Dynamics CRM | IMAGINE | Individuals | MINNIE MOUSE | Create | WALT DISNEY imagine

INDIVIDUAL : INFORMATION
MINNIE MOUSE

Date of Birth* 1/1/2001 | SSN XXX-XX-023 | Assigned SSA WALT DISN

Contacts

All Team Members

Connected To ↑	Email (Connected To)	Primary Phone Number (Connected...	Email (Connecte...	Primary Phone N...	Role (To) ↑	Relationship	Te
Golf Links LLC					4 - Provider	provider	Ass
JACKSON LATOYA L J					4 - Provider		Ass
NEW CIRCLE OF SUPPORT G...					6 - Friend	friend	Ass
WALT DISNEY					7 - SSA		Ass

Microsoft Dynamics CRM | IMAGINE | Individuals | MINNIE MOUSE | Create | WALT DISNEY imagine

INDIVIDUAL : INFORMATION
MINNIE MOUSE

Date of Birth* 1/1/2001 | SSN XXX-XX-023 | Assigned SSA WALT DISN

Contacts

All Team Members

- System Views
- All Team Members
- Assigned Team Members
- Connections History View
- Contacts Without Access to imagine
- Contributing Team Members
- Emergency Contacts**
- Save Filters as New View
- Save Filters as Current View

Connected To	Primary Phone Number (Connected...	Email (Connecte...	Primary Phone N...	Role (To) ↑	Relationship	Te
				4 - Provider	provider	Ass
				4 - Provider		Ass
				6 - Friend	friend	Ass
				7 - SSA		Ass

Emergency Contacts

The screenshot displays the Microsoft Dynamics CRM interface for a user named WALT DISNEY imagine. The main header shows the user's name and a 'Create' button. Below the header, there are navigation options: 'SAVE', 'SAVE & CLOSE', 'CONNECT', and 'EMAIL A LINK'. The main content area shows the profile of 'MINNIE MOUSE' with a Minnie Mouse avatar. The profile includes fields for 'Date of Birth*' (1/1/2001), 'SSN' (XXX-XX-023), and 'Assigned SSA' (WALT DISNEY). Below the profile, there is a 'Contacts' section with a dropdown menu set to 'Emergency Contacts'. A table lists the emergency contacts, with one entry for 'MICKEY MOUSE'.

Emergency Contact	Connected To ↑	Email (Connected To)	Primary Phone Number (Connected...	Email (Connected To)	Primary Phone Numb...	Role (To) ↑
Yes		MICKEY MOUSE				

Contents

Overview

Setting Direct Reports

Assigning an SSA to an Individual

Individual Front Page

Contacts

Questions

Questions ??