

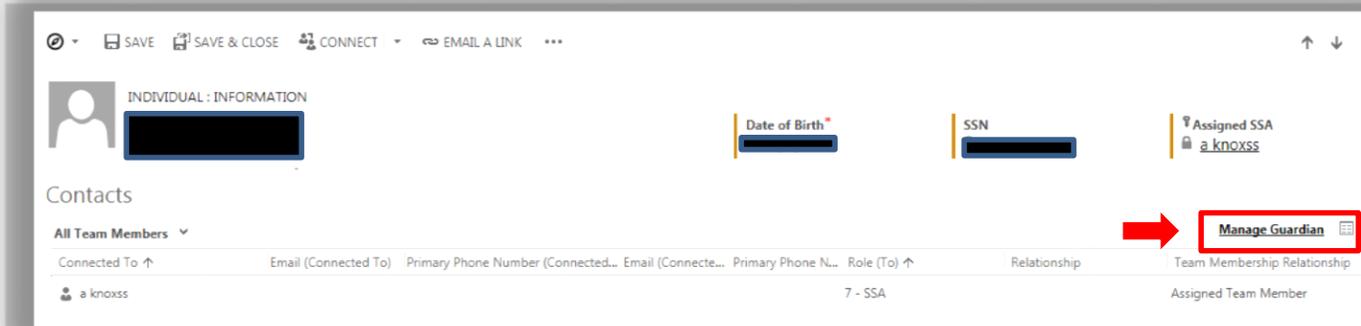
County Board guardian instructions

Summary

- DODD has released an update that will affect the way you update your individuals' guardian information.
- All categories of Guardians can be connected to an individual from the Contacts section in the Individual information page.
- Non-Imagine Counties are now able to view/edit Guardians/Co-Guardians connected to an individual

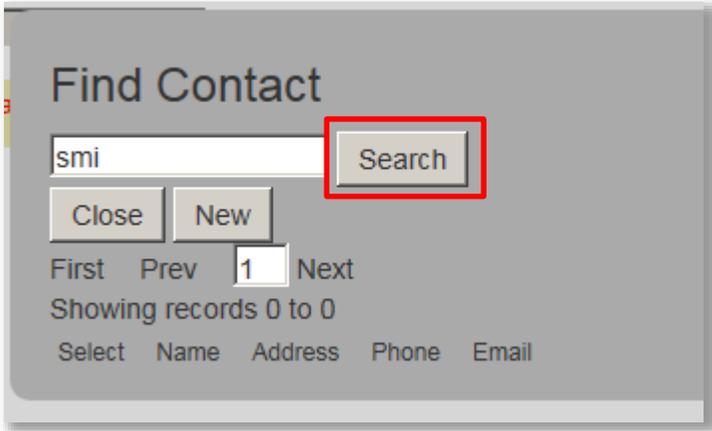
Detail

1. **Adding Guardians to an individual:** Click on the button Manage Guardian to open the Add Guardian overlay.



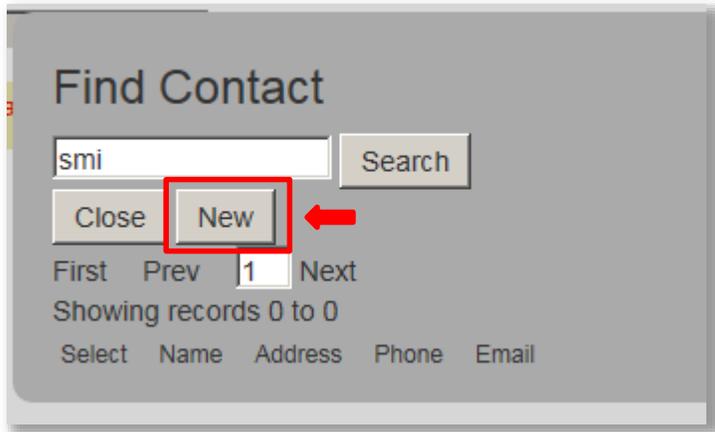
Click on the plus button to add various categories of Guardians (Guardianship of Estate, Person, or Person & Estate; Interim; Emergency; Limited; APSI; Co-Guardianship or Other). Select the guardianship category, guardian name, limited options (available only for Limited Guardianship), court appointed or emergency contact checkboxes if appropriate, start date and the end date. **Please note:** Start/end dates can't overlap. When an individual has more than one guardian they must all be listed as Co-Guardians.

Category	Guardian name	Limited to behavior	Limited to medical	Limited to placement	Limited to other	Court appointed	Emergency contact	Start date	End date	
Guardianship of Estate	Subha_Test123 M					<input type="checkbox"/>	<input type="checkbox"/>	03/30/2016		<input type="button" value="Update"/>
Guardianship of Person & Estate	[REDACTED]					<input type="checkbox"/>	<input type="checkbox"/>	03/29/2016	03/29/2016	<input type="button" value="Update"/>
Guardianship of Person	test guardian					<input type="checkbox"/>	<input type="checkbox"/>	01/28/2016	03/28/2016	<input type="button" value="Update"/>



5. Add a new Contact as a Guardian:

If desired Guardian is not listed, click on the New button to add a new Contact as a Guardian.



6. Complete the Guardian Demographic Information:

The Name & Address Fields are mandatory.

Imagine Counties Please note a valid email address is needed to invite guardians into the portal. A description of this is listed below.

Category	Guardian name	Limited to behavior	Limited to medical	Limited to placement	Limited to other	Court appointed	Emergency contact	Start date	End date
Guardianship of Estate	Subha_Test123 M							04/04/2016	
Guardianship of Person & Estate								03/30/2016	
Guardianship of Person	test guardian							03/29/2016	03/29/2016
								01/28/2016	03/28/2016

First name: *
Last name: *
Primary phone #:
Secondary phone #:
Email:
Address Line 1: *
City: *
State: * OH
Zip/Postal Code: *
Create Cancel

Once the proper fields are completed click the Create button. The Find Contact Overlay will close and the Guardian will populate into the Guardian Name field.

7. Send Portal Invitation to the Guardian (Imagine Counties only):

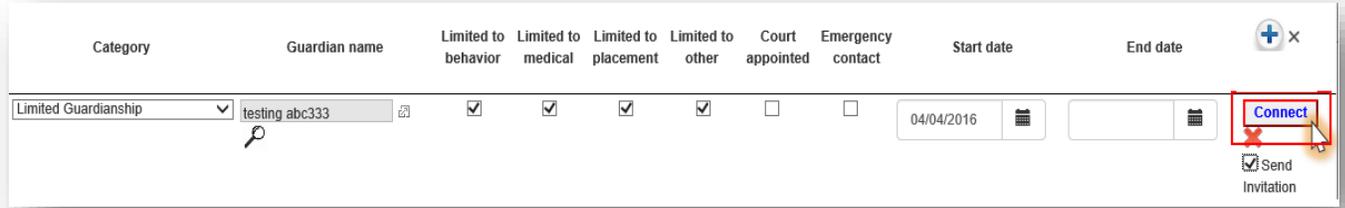
If you are an Imagine County, select Send Invitation checkbox to send portal invitation to a guardian prior to hitting the Connect button. This will allow the guardian access to an individuals' specific information (ISP, Outcomes, etc.). There must be a valid email address listed in their demographic information.

Category	Guardian name	Limited to behavior	Limited to medical	Limited to placement	Limited to other	Court appointed	Emergency contact	Start date	End date
Limited Guardianship	testing abc333	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/04/2016	

Connect
 Send Invitation

8. Click on the Connect button to associate/add the Guardian to the Individual:

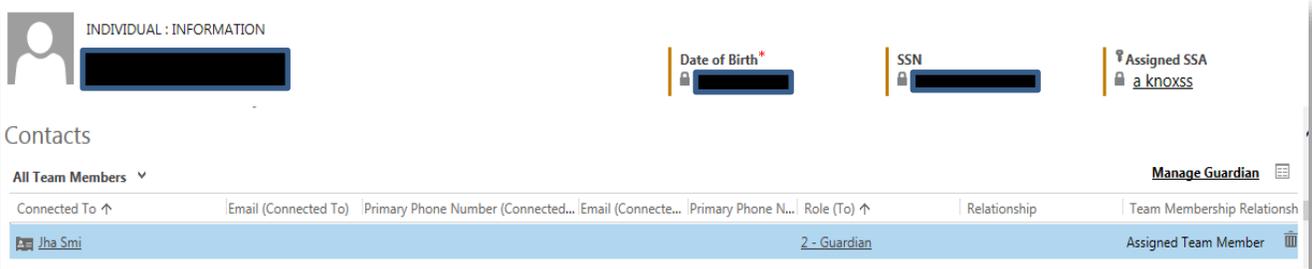
After clicking the connect button, click the “X” next to the add  button to close the Manage Guardian Overlay.



Category	Guardian name	Limited to behavior	Limited to medical	Limited to placement	Limited to other	Court appointed	Emergency contact	Start date	End date	
Limited Guardianship	testing abc333	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/04/2016		Connect <input checked="" type="checkbox"/> Send Invitation

9. Guardian Address entered in CRM integrated with WMS:

Once the Guardian Connection is made the guardian will be listed in the Contacts section of the Individuals homepage. Open WMS to view the Address entered in CRM. You will see the Guardian is the same.



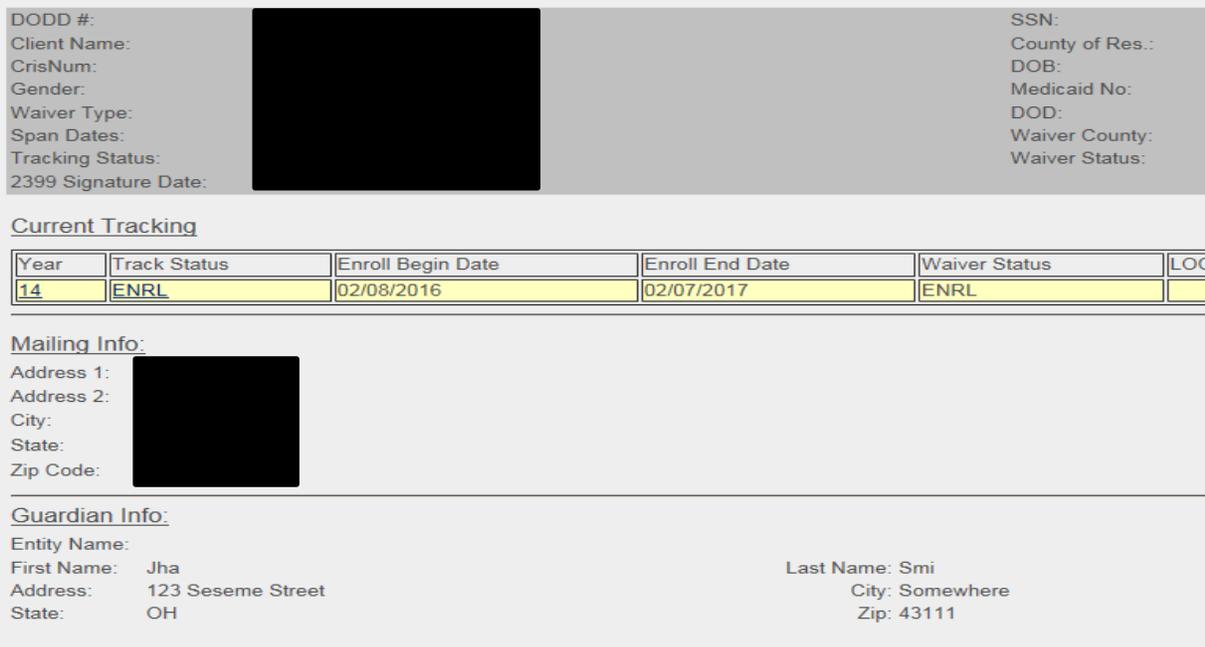
INDIVIDUAL : INFORMATION

Date of Birth* [redacted] SSN [redacted] Assigned SSA a.knoxss

Contacts

All Team Members Manage Guardian

Connected To ↑	Email (Connected To)	Primary Phone Number (Connected...	Email (Connecte...	Primary Phone N...	Role (To) ↑	Relationship	Team Membership Relationsh
					2 - Guardian		Assigned Team Member



DODD #: [redacted] SSN: [redacted]

Client Name: [redacted] County of Res.: [redacted]

CrisNum: [redacted] DOB: [redacted]

Gender: [redacted] Medicaid No: [redacted]

Waiver Type: [redacted] DOD: [redacted]

Span Dates: [redacted] Waiver County: [redacted]

Tracking Status: [redacted] Waiver Status: [redacted]

2399 Signature Date: [redacted]

Current Tracking

Year	Track Status	Enroll Begin Date	Enroll End Date	Waiver Status	LOC
14	ENRL	02/08/2016	02/07/2017	ENRL	

Mailing Info:

Address 1: [redacted]

Address 2: [redacted]

City: [redacted]

State: [redacted]

Zip Code: [redacted]

Guardian Info:

Entity Name:

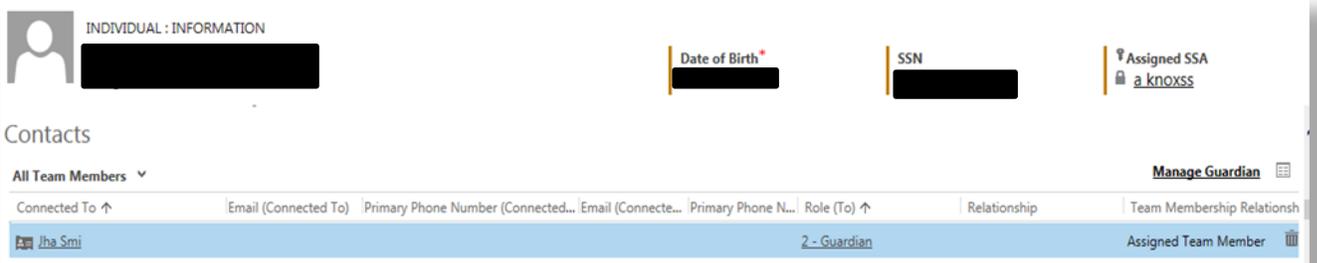
First Name: Jha Last Name: Smi

Address: 123 Seseme Street City: Somewhere

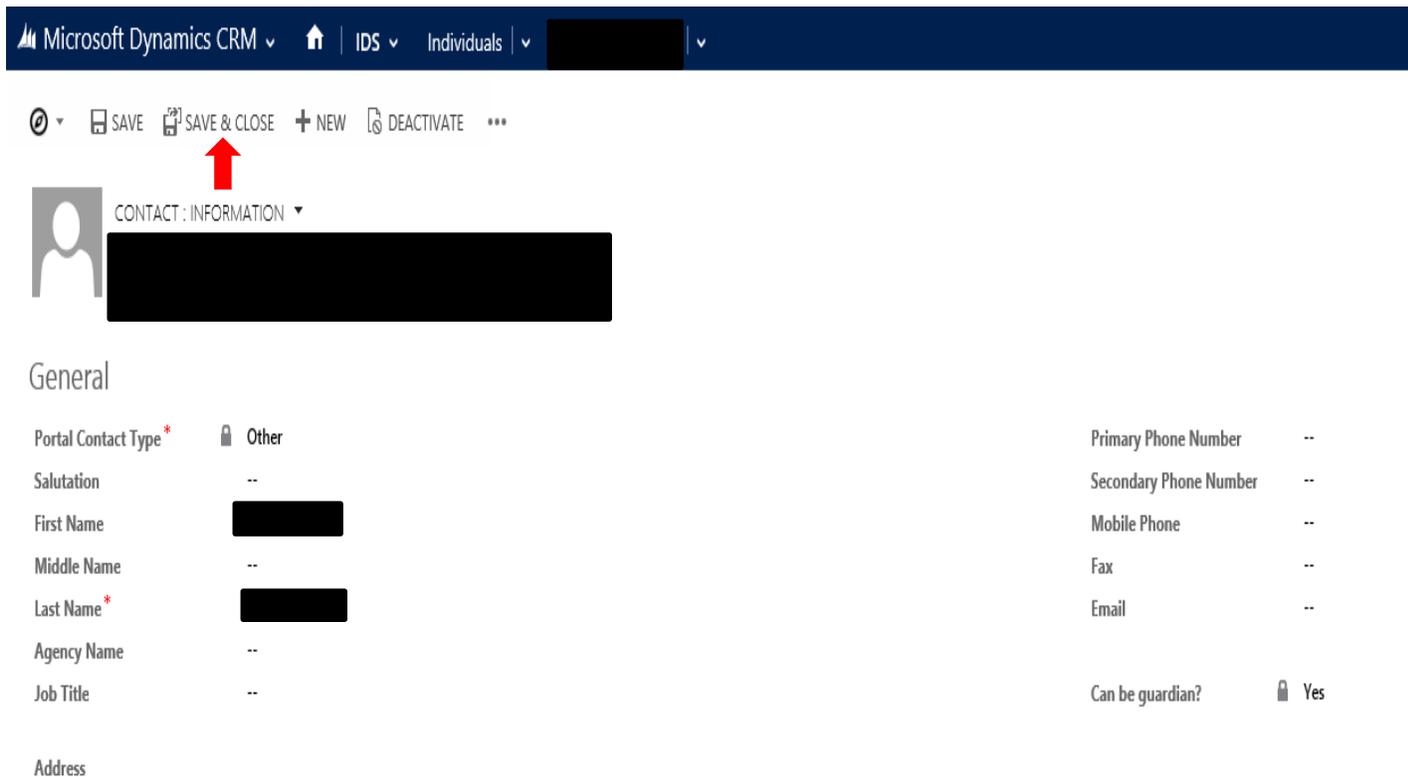
State: OH Zip: 43111

10. Editing a Guardians information after connection:

Under the Contact section on the individuals' home page, click the hyperlink (contacts name) in the Contacts section for the contact you would like to edit



This opens the contact record. You may edit any of the information contained. Please limit the changes to only the following to ensure a proper record: First Name, Last Name, Middle Name, Salutation, Phone numbers/Fax, Email, and Address fields. The remaining fields are either not used, or are used for connections (please do not edit these); edits of these fields may lead to a connection issue with your guardian.



Once the edits are complete click save and close to return to the individual's record. You will now see the updated record reflected in the Contacts section:

11. XML download of guardian data in your County:

Starting on your dashboard page, click on the dashboard view dropdown to view the Download XML File – Guardian option. Click it to go to the page for the xml download of guardian data. This file can be uploaded into approved 3rd party systems.

Microsoft Dynamics CRM | IMAGINE | Dashboards

SSA Caseload View

System Dashboards

- Agreement Tracking Dashboard
- Alliance County Transfers
- Billing Specialist Dashboard
- Budget Support Specialist Financial Dashboard
- Case Note Calendar
- Download XML File - Guardian**
- Eligibility Specialist Dashboard
- Eligibility Management by County and Date
- Evaluator Dashboard
- Financial Approval Dashboard
- Group Manager - Review Statistics
- Group Manager Dashboard
- Individual Service Plan

SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County	Date of De
		a KnoxSS	KNOX	KNOX	
		a KnoxSS	KNOX	KNOX	
		a KnoxSS	KNOX	KNOX	
		a KnoxSS	KNOX	KNOX	
		a KnoxSS	KNOX	ADAM	

Download XML File - Guardian

Select a County: --Select--

Download Guardian XML

Guardian Reporting Instructions

Summary

- DODD has released an update that will affect the way current Guardians in Imagine Counties can access their individuals' information.
- Below are the steps for how a Guardian can pull a report from the Imagine Portal showing the individuals for which they are associated with as the Guardian

Detail

1. Generate Guardian Report to view all associated individuals under a specific guardian:

Login to portal as a guardian and click on Guardian reports tab on the top navigation bar.



Select Associated Individuals from the Report Dropdown.



The report will display in the section below the Select Report dropdown.



The report can also be downloaded in the following formats:

