

Contents

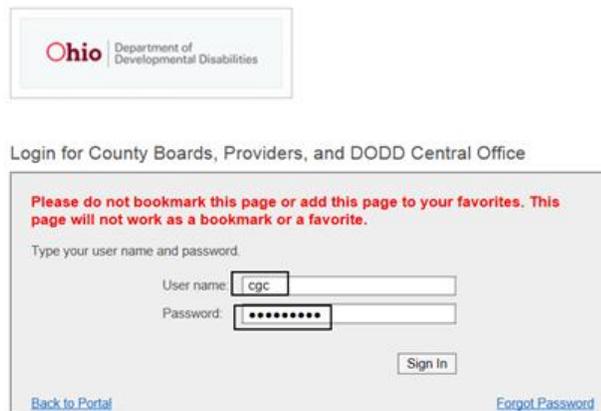
Login.....	2
Dashboard.....	3
Access Individual.....	5
Search Individual.....	7
Start Individual Create Process.....	9
Create Introduction.....	11
Create Individual.....	13
Search Individual.....	17
Edit Individual's Information.....	19
Add Address.....	21
Edit Individual Address.....	25
Edit Service and Support.....	27
Individual Transfer Process (ITR).....	28

Disclaimer - All data in this document is fictitious and/or redacted

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

Login

1. **Open Your Browser** (internet explorer or chrome)
2. **Enter your User Name and Password**
(Role: Customer Guide)

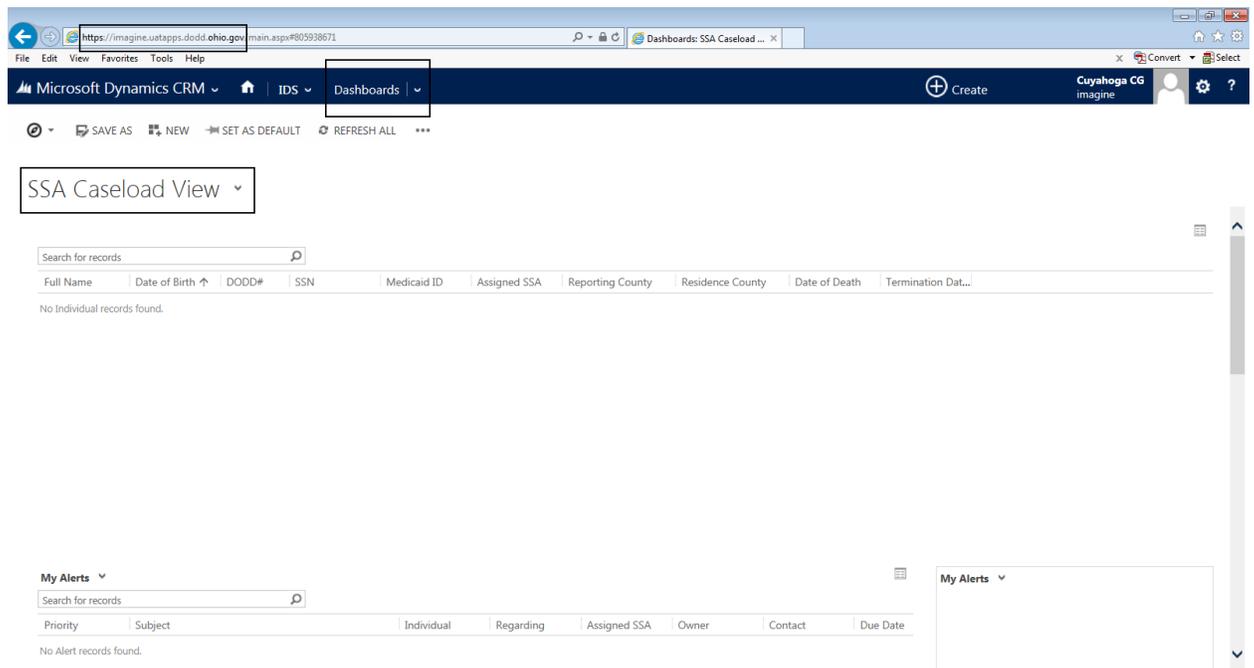


The screenshot shows the login interface for the Ohio Department of Developmental Disabilities. At the top left is the logo with the text "Ohio Department of Developmental Disabilities". Below the logo is the heading "Login for County Boards, Providers, and DODD Central Office". A red warning message states: "Please do not bookmark this page or add this page to your favorites. This page will not work as a bookmark or a favorite." Below this is the instruction "Type your user name and password." followed by two input fields: "User name:" with the value "cgc" and "Password:" with masked characters. A "Sign In" button is positioned to the right of the password field. At the bottom left is a link "Back to Portal" and at the bottom right is a link "Forgot Password".

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

Dashboard

3. Once the user has logged in they will be taken to the Customer Guide **Dashboard**



4. If you don't see the SSA Caseload View:

- a) Click on the dropdown arrow next to the currently selected view.
- b) Click on the view associated with the role you would like to open (ex. SSA Caseload view).
- c) Once selected from the view selector dropdown the SSA Caseload View will be visible.

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

The screenshot shows a web browser window with the URL <https://imagine.uatapps.dodd.ohio.gov/main.aspx#461646143>. The browser's address bar and menu bar are visible. The Microsoft Dynamics CRM navigation bar includes 'Microsoft Dynamics CRM', a home icon, 'IDS', and 'Dashboards'. Below the navigation bar, there are icons for 'SAVE AS', 'NEW', 'SET AS DEFAULT', and 'REFRESH ALL'. The 'Dashboards' menu is open, showing a list of dashboard options. The 'County Transfers' option is highlighted, and its dropdown menu is open, listing various dashboard views. The 'SSA Caseload View' option is highlighted in the dropdown menu. The background of the page shows a table with columns 'Request Date', 'Created By', and 'Created On', and a message: 'You do not have permission to access these records. Contact your Microsoft Dynamics CR'.

Microsoft Dynamics CRM | IDS | Dashboards

SAVE AS | NEW | SET AS DEFAULT | REFRESH ALL

County Transfers

- Billing Specialist Dashboard
- Budget Support Specialist Financial Dashboard
- County Transfers
- Customer Service Representative Social Dashboa...
- Download XML File
- Eligibility Specialist Dashboard
- Evaluator Dashboard
- Financial Approval Dashboard
- Group Manager - Review Statistics
- Group Manager Dashboard
- LOC Analysis Dashboard
- Marketing Social Dashboard
- Microsoft Dynamics CRM Social Overview
- My Feedback Notes Dashboard
- 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
- Waiver LOC Redet

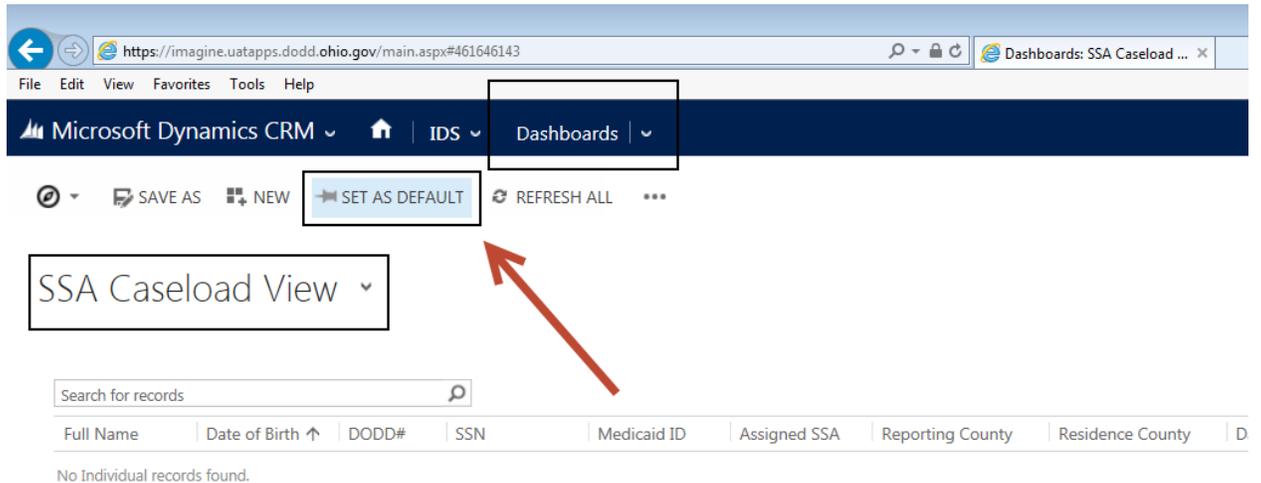
Request Date | Created By | Created On

You do not have permission to access these records. Contact your Microsoft Dynamics CR

Request Date | Created By | Created On

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

d) Finally, click on “Set as Default” on top of this dashboard page if you wish to pin this as your **Home** landing page.

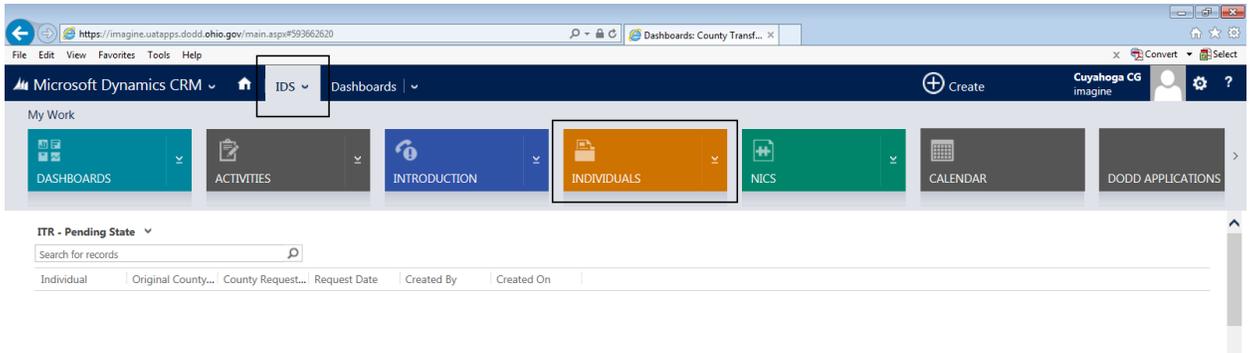


Access Individual

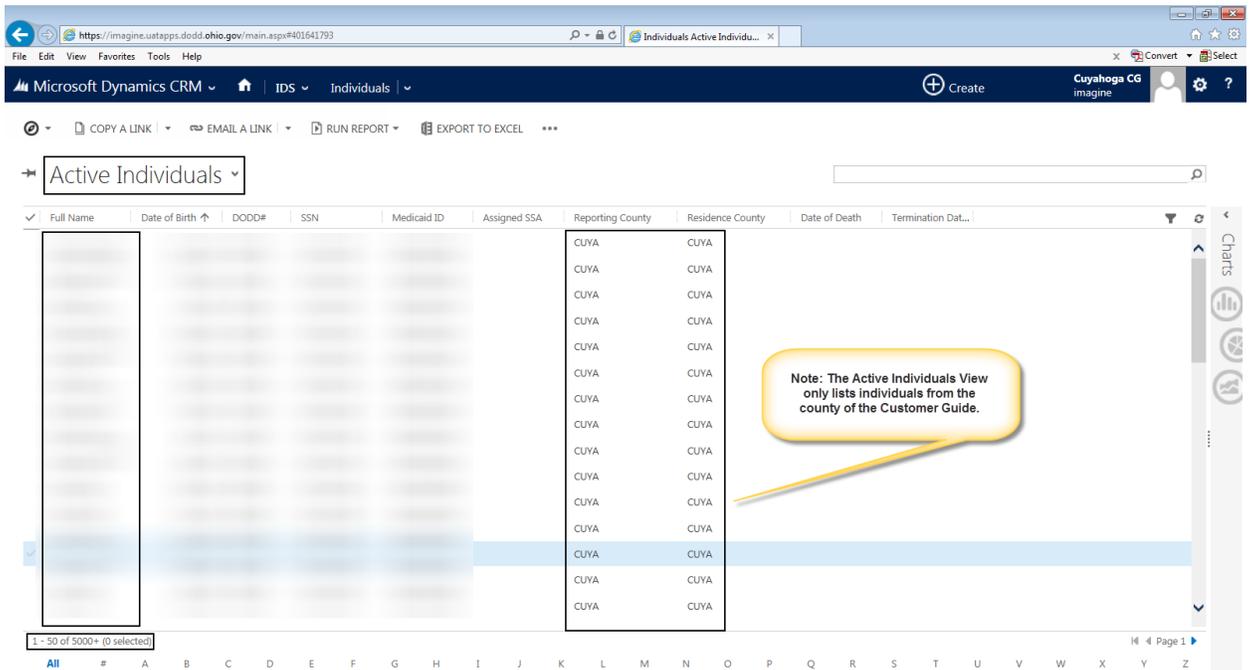
5. To access list of individuals in your county:

a) Scroll over the **IDS** icon to display all of the tiles (entities) under the IDS application. Click the **INDIVIDUALS** tile.

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM



b) You will now be presented with **Active Individuals view** that will list all active individuals in *your* county.



Search Individual

6. Follow these steps to Individual Search

a) Search for individual by entering search criteria in the search box. Fields available to search on include: First Name, Last Name, Full Name (Ex. Jonathan Dawkins), Date of Birth, Medicaid #, SSN and DODD#.

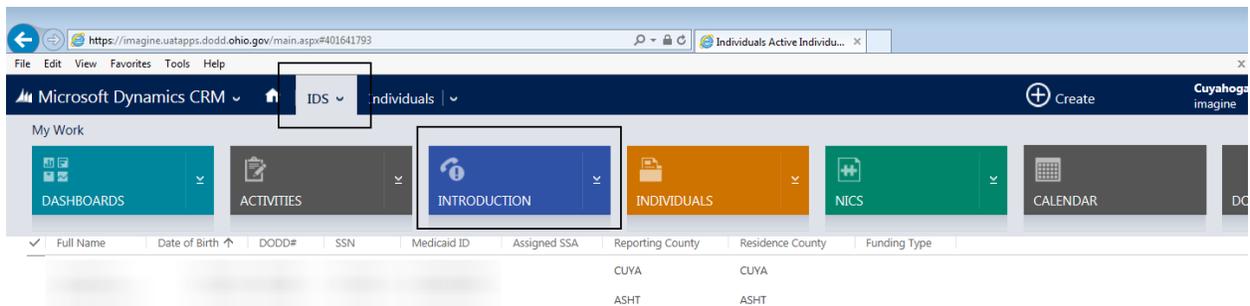
Note: As a Customer Guide you have the ability to search all individuals across 88 counties.

b) Hit **Enter** or click on the magnifying glass to search
c) Individual record(s) will be displayed if an individual exists in any of the 88 counties.

Start Individual Create Process

7. Follow these steps to Create New Individual

- a) Select the INTRODUCTION Tile from dropdown arrow next to IDS.



Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

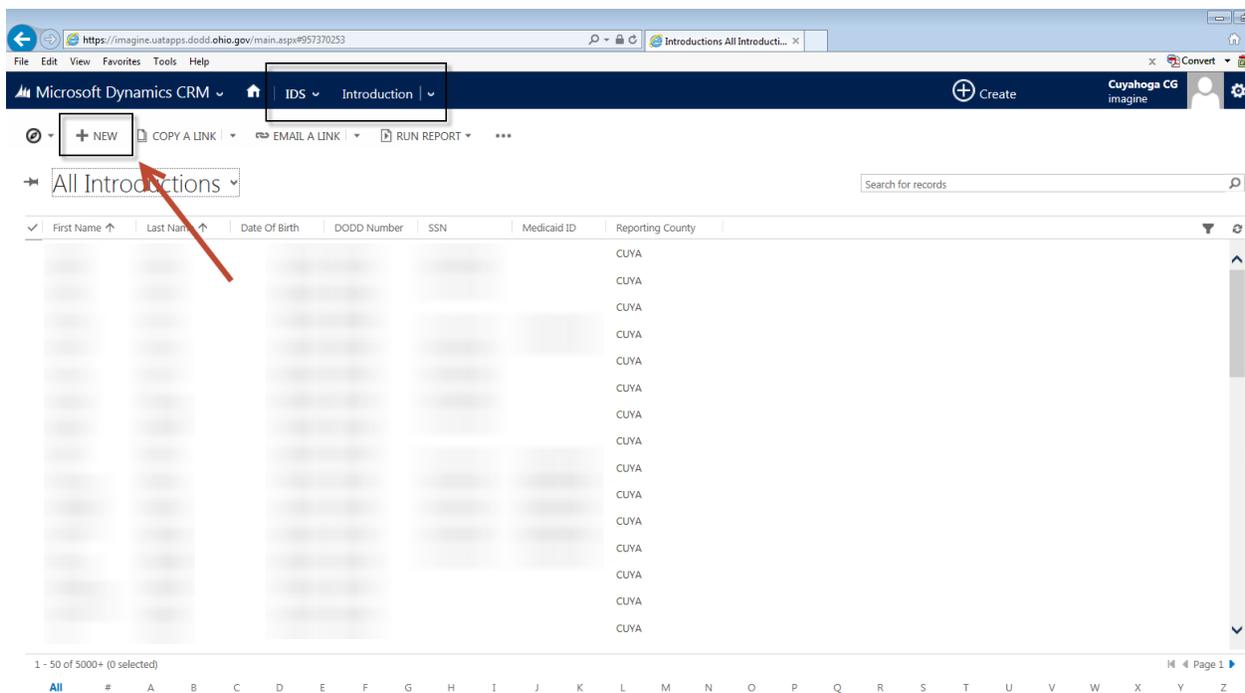
b) The **All Introductions** View displays introductions from the county of the Customer Guide only.

The screenshot displays the Microsoft Dynamics CRM interface for the 'All Introductions' view. The browser address bar shows the URL: <https://imagine.uatapps.dodd.ohio.gov/main.aspx#957370253>. The navigation pane shows the path: **IDS > Introduction > All Introductions**. The main content area displays a table with the following columns: First Name, Last Name, Date Of Birth, DODD Number, SSN, Medicaid ID, and Reporting County. The 'Reporting County' column contains multiple entries of 'CUYA'. A callout box points to this column with the text: 'The All Introductions View displays the records from the county of the Customer Guide only.' The status bar at the bottom indicates '1 - 50 of 5000+ (0 selected)' and a list of letters from A to Q.

Create Introduction

8. Follow these steps to Create Introduction

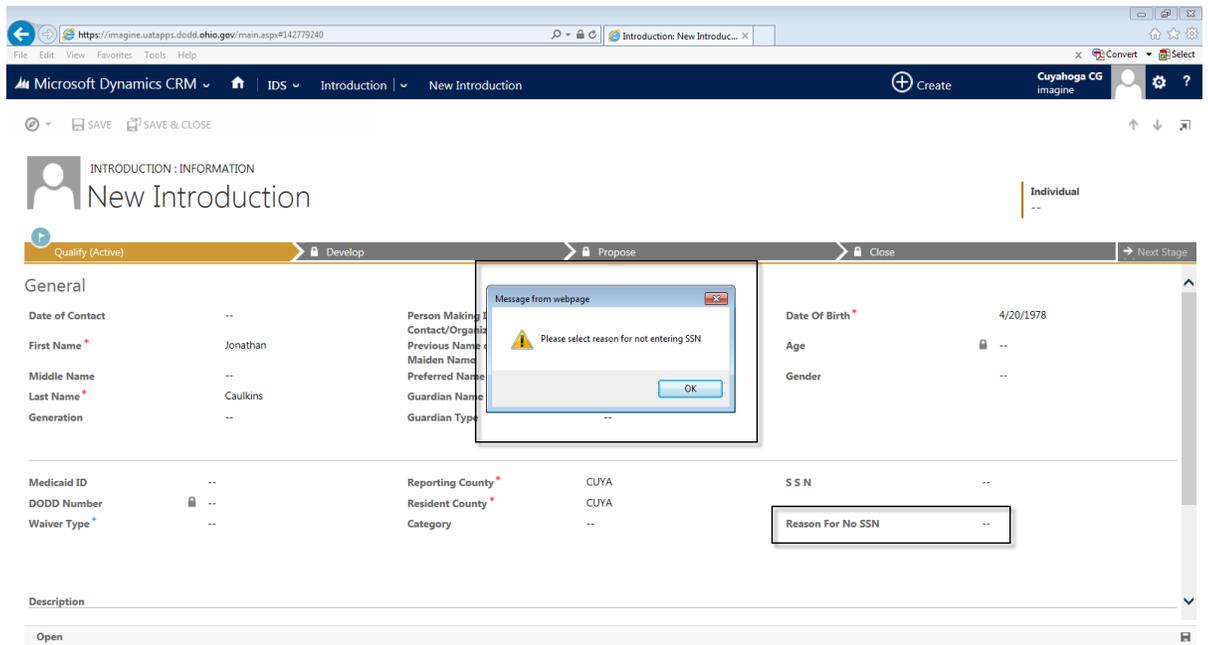
a) Click on the **+ NEW** button on the left top corner of the Introduction page to create a new introduction



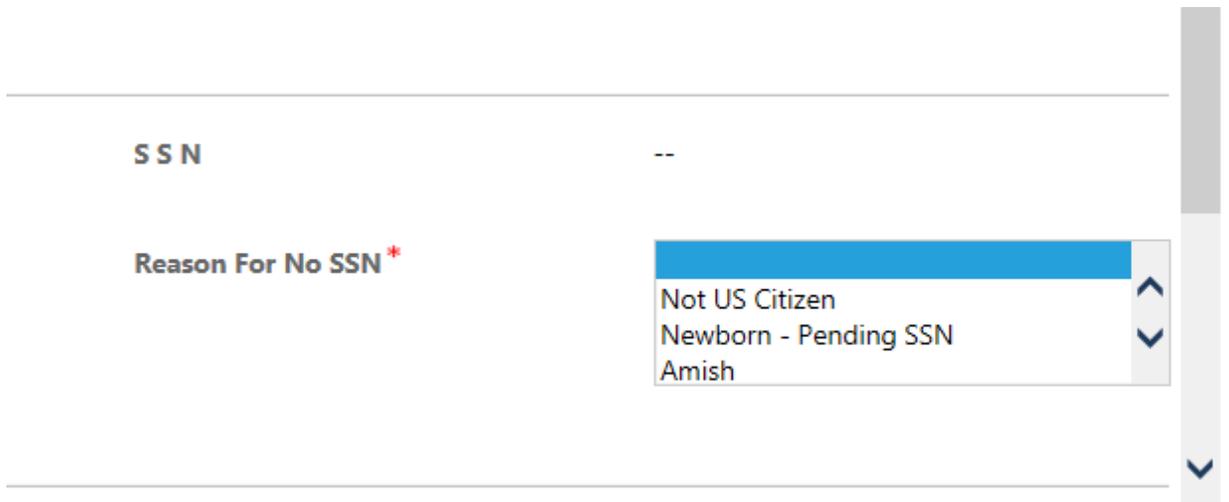
a) Enter the **General** introduction information like First Name, Last Name, Date of Birth, Reporting County, Resident County and SSN and/or Reason for No SSN.

Note: *Required* fields are denoted with a red (*).

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM



Note: If you try to **Save** the record without entering a SSN you will be prompted to provide a reason for not entering one.



Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

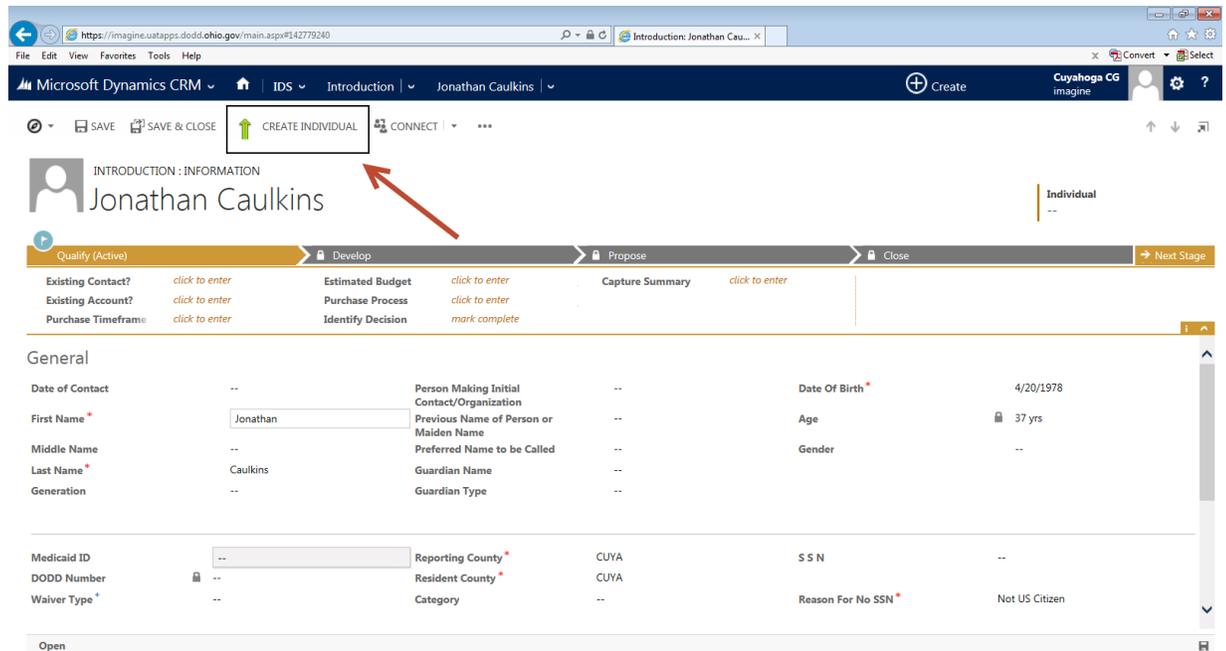
The screenshot displays the Microsoft Dynamics CRM interface for an 'Introduction' record. At the top, a navigation bar includes 'Microsoft Dynamics CRM', 'IDS', 'Introduction', and 'Jonathan Caulkins'. A 'CREATE INDIVIDUAL' button is visible in the top navigation area. Below the navigation bar, the 'INTRODUCTION : INFORMATION' form is shown for 'Jonathan Caulkins'. The form has a 'Quality (Active)' status and a 'Next Stage' button. The form is divided into sections: 'General' and 'Medicaid ID'. The 'General' section contains fields for 'Date of Contact', 'First Name', 'Middle Name', 'Last Name', 'Generation', 'Person Making Initial Contact/Organization', 'Previous Name of Person or Maiden Name', 'Preferred Name to be Called', 'Guardian Name', and 'Guardian Type'. The 'Medicaid ID' section contains fields for 'Medicaid ID', 'DODD Number', 'Waiver Type', 'Reporting County', 'Resident County', 'Category', 'CUYA', 'SSN', and 'Reason For No SSN'. The 'Date of Birth' field is populated with '4/20/1978' and the 'Age' field is '37 yrs'.

Create Individual

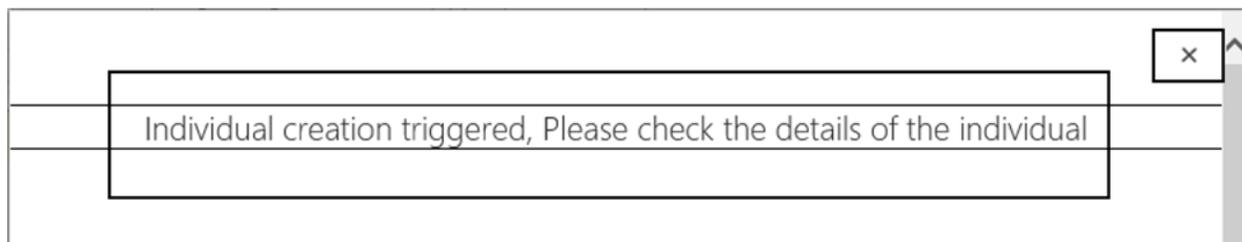
9. Follow these steps to Create Individual in IDS

- Once the new Introduction record has been created, the the **CREATE INDIVIDUAL** button will appear at the top of the page:

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM



- b) Click the **CREATE INDIVIDUAL** button at the top of the page to promote the introduction to an individual. Once you click the **CREATE INDIVIDUAL** button a screen will pop up alerting the user that the “Individual creation triggered”. Close the pop up and wait for a minute to allow the individual create process to run.



Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

c) Alternatively, if *potential* duplicates are found – ex. individuals having the same First name, Last name, Date of Birth, Medicaid and SSN - you can still create the new individual by *attesting* to the new individual create. The same six duplicate rules that exist in IDS today have been replicated in CRM.

Name	DODD Number	DOB	SSN	Med Num	Created On	Funding Type	Error Message
Jonathan Caulkins	9988481	Thu Apr 20 04:00:00 EDT 1978	null	null	Tue Jun 9 15:49:43 EDT 2015	undefined	4. Duplicate First Name and Last Name 6. Duplicate First 3 Letter of first name and first 5 letter of last name

Showing 1 to 1 of 1 entries

I attest, to my best knowledge, no one listed above is the same person I am trying to add.

Note: The system will not allow you to create the new individual in the case where either a **Medicaid or SSN already exists.**

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

d) To attest simply check the attestation checkbox, click on the Create Individual button. The pop up will now read, “Individual Creation triggered”. Close the pop up and wait for a minute to allow the individual create process to run. Go to the individual search page to locate your newly created individual.

The screenshot shows a CRM interface with a table of individuals. The table has columns for Name, DODD Number, DOB, SSN, Med Num, Created On, Funding Type, and Error Message. The first row is highlighted in blue and contains the following data:

Name	DODD Number	DOB	SSN	Med Num	Created On	Funding Type	Error Message
Jonathan Caulkins	9988481	Thu Apr 20 04:00:00 EDT 1978	null	null	Tue Jun 9 15:49:43 EDT 2015	undefined	4. Duplicate First Name and Last Name 6. Duplicate First 3 Letter of first name and first 5 letter of last name

Below the table, there is a checkbox with a checkmark and the text "attest, to my best knowledge, no one listed above is the same person I am trying to add." Below this text is a yellow button labeled "Create Individual". Red arrows point to the checkbox and the button.

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

Showing 1 to 1 of 1 entries

Name	DODD Number	DOB	SSN	Med Num	Created On	Funding Type	Error Message
Jonathan Caulkins	9988481	Thu Apr 20 04:00:00 EDT 1978	null	null	Tue Jun 9 15:49:43 EDT 2015	undefined	4. Duplicate First Name and Last Name 6. Duplicate First 3 Letter of first name and first 5 letter of last name

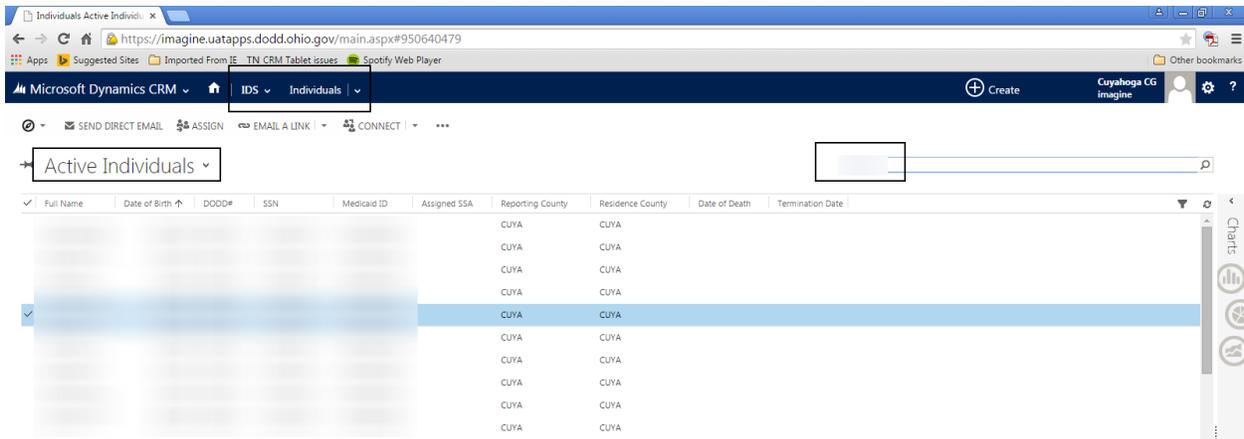
I attest, to my best knowledge, no one listed above is the same person I am trying to add.
Individual Creation triggered

Search Individual

10. Follow these steps to Search for individual

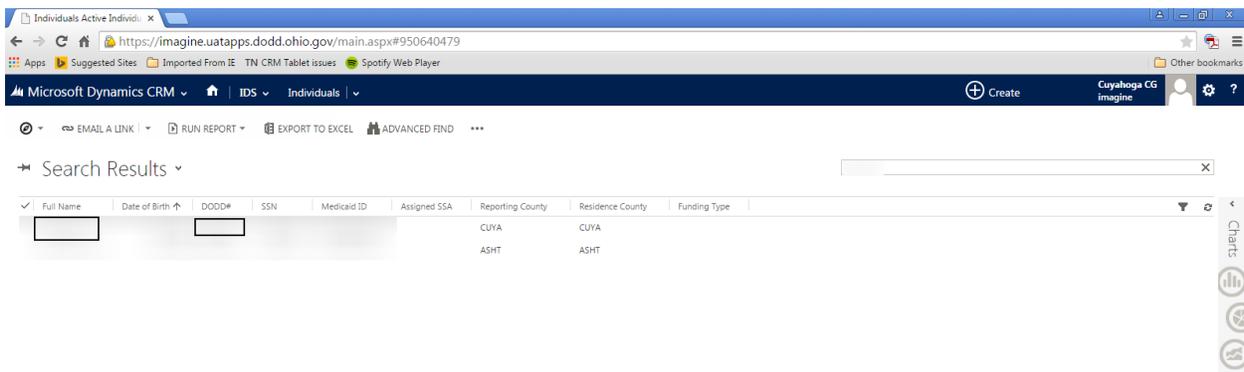
- Search for an individual by entering search criteria in the search box. Fields available to search on include: First Name, Last Name, Full Name (Ex. Jonathan Dawkins), Date of Birth, Medicaid #, SSN and DODD#.

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM



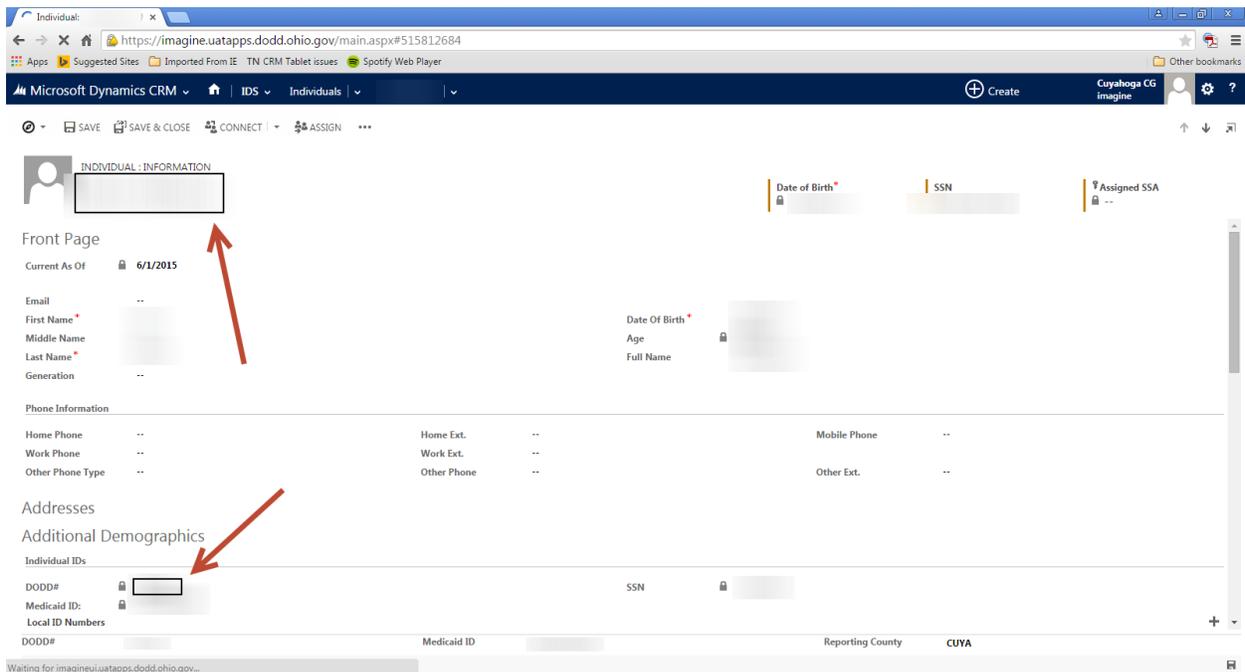
Note: As a Customer Guide you have the ability to search individuals across all 88 counties.

b) The new individual created will have a **unique DODD#** associated with it.



c) Double click on the individual record from the Individual List in the Search page to navigate to the individual details page.

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM



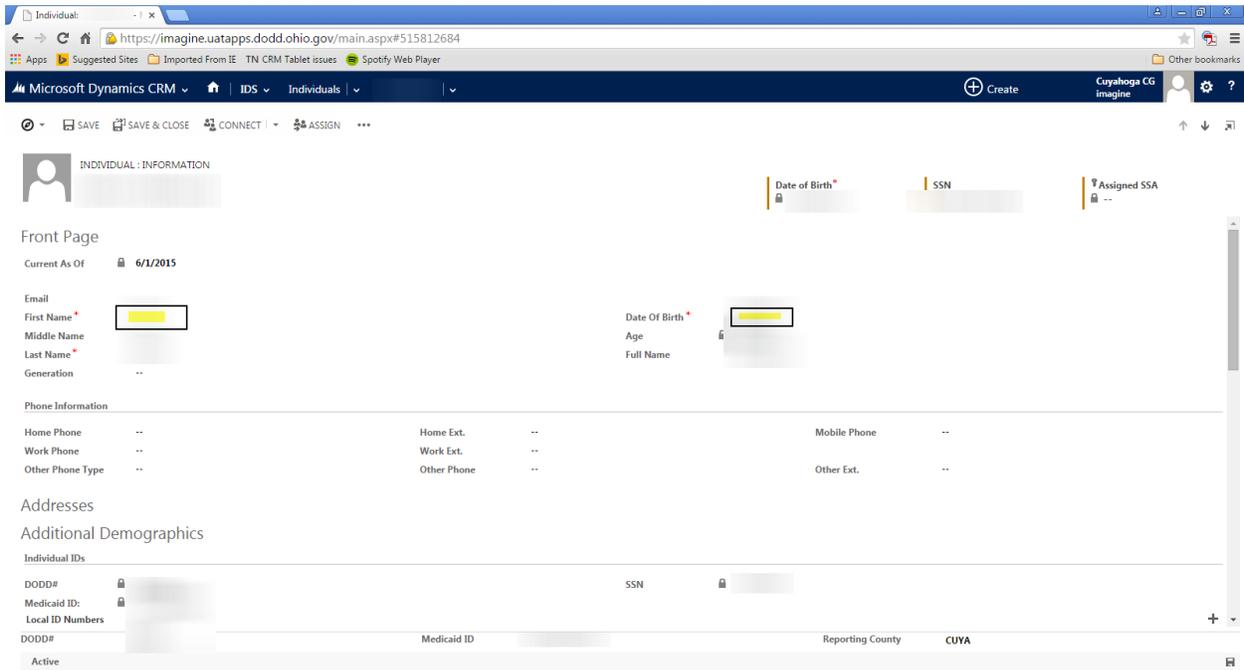
Edit Individual's Information

11. Edit an Individual's Front Page information

- a) Open Individual detail Page and edit an individual's general information such as First Name, Middle Name, Last Name, Email, Date of Birth, Generation, Home Phone, Work Phone, Mobile Phone etc.

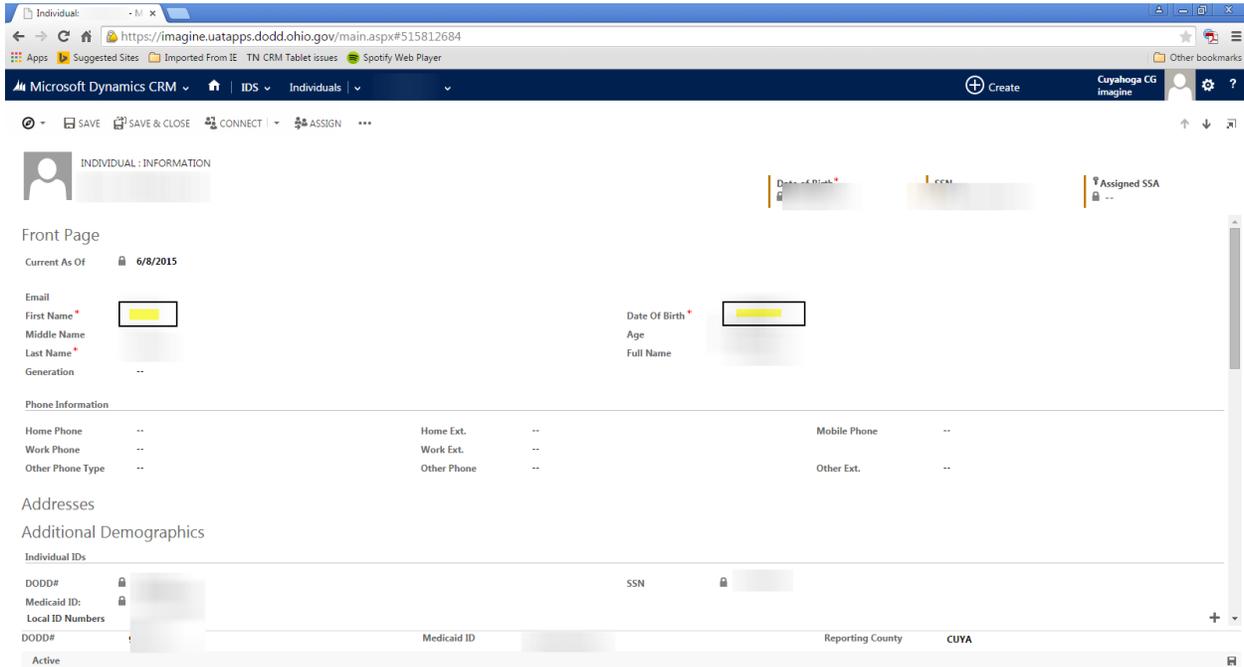
Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

Before edit:



The screenshot shows the 'Individual: INFORMATION' form in Microsoft Dynamics CRM. The 'Current As Of' date is 6/1/2015. The 'Email' section contains fields for First Name, Middle Name, Last Name, and Generation, with a yellow box highlighting the First Name field. The 'Date Of Birth' section contains fields for Age and Full Name, with a yellow box highlighting the Date Of Birth field. The 'Phone Information' section includes Home Phone, Work Phone, Other Phone Type, Home Ext., Work Ext., Other Phone, Mobile Phone, and Other Ext. The 'Addresses' section is empty. The 'Additional Demographics' section includes Individual IDs, DODD#, Medicaid ID, Local ID Numbers, and Reporting County (CUYA). The 'Active' status is set to 'Active'.

After edit:

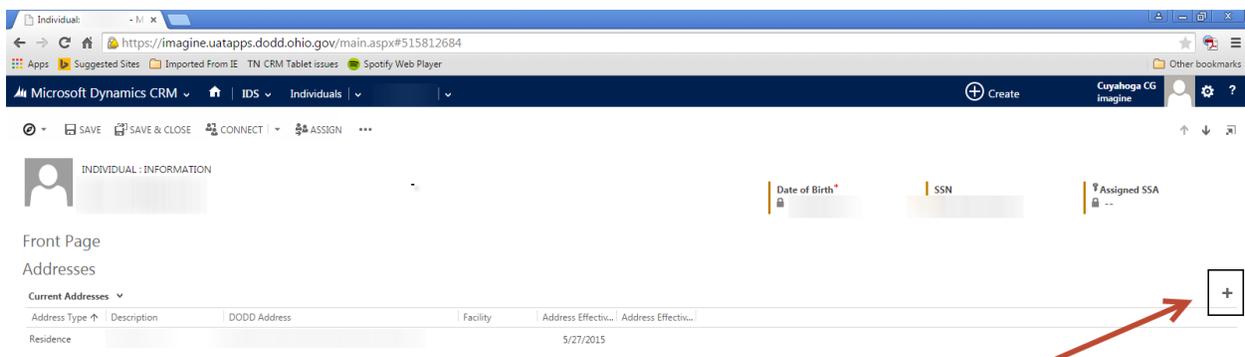


The screenshot shows the 'Individual: INFORMATION' form in Microsoft Dynamics CRM after editing. The 'Current As Of' date is now 6/8/2015. The 'Email' section contains fields for First Name, Middle Name, Last Name, and Generation, with a yellow box highlighting the First Name field. The 'Date Of Birth' section contains fields for Age and Full Name, with a yellow box highlighting the Date Of Birth field. The 'Phone Information' section includes Home Phone, Work Phone, Other Phone Type, Home Ext., Work Ext., Other Phone, Mobile Phone, and Other Ext. The 'Addresses' section is empty. The 'Additional Demographics' section includes Individual IDs, DODD#, Medicaid ID, Local ID Numbers, and Reporting County (CUYA). The 'Active' status is set to 'Active'.

Add Address

12. Add an Individual's Address information

- a) Expand the Address section of the Individual
- b) Click the Plus sign at the right top of this section to go to



- c) Description, Address Type, Address and Address Effective Begin date are all required fields denoted with a red asterisk (*). Clicking the magnifying glass will allow you to add a new address.

Note: If you select Residence as Address type, you need to select Living Arrangement Category and Subcategory. Also **NOTE you cannot enter a residence address if the individual lives in an ICF-IID setting and if they live in a**

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

license setting, you will have to select the address from the listing of the licensure database.

INDIVIDUAL ADDRESS : INFORMATION
New Individual Address

Individual
Judith Altfather

General

Description *
Home address
Address Type *
Residence *
Living Arrangement Category *
Congregate
Living Arrangement Subcategory *
Roommate

You must provide a value for Address.

Address Dates

Address Effective Begin Date *
6/11/2015

Address Effective End Date
..

d) Click the **+New** button

Address *

10 results

+ New

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

- e) Street1, City, State and Zip are required fields denoted with a red asterisk (*). **SAVE & CLOSE** when you are done entering the new address detail.

Address: New Address - Microsoft Dynamics CRM - Google Chrome
https://imagine.uatapps.dodd.ohio.gov/main.aspx?etc=10403&extraqs=%3f_CreateFromId%3d%26_CreateFromType%3d10404%26_search

New Address

ADDRESS : INFORMATION

New Address

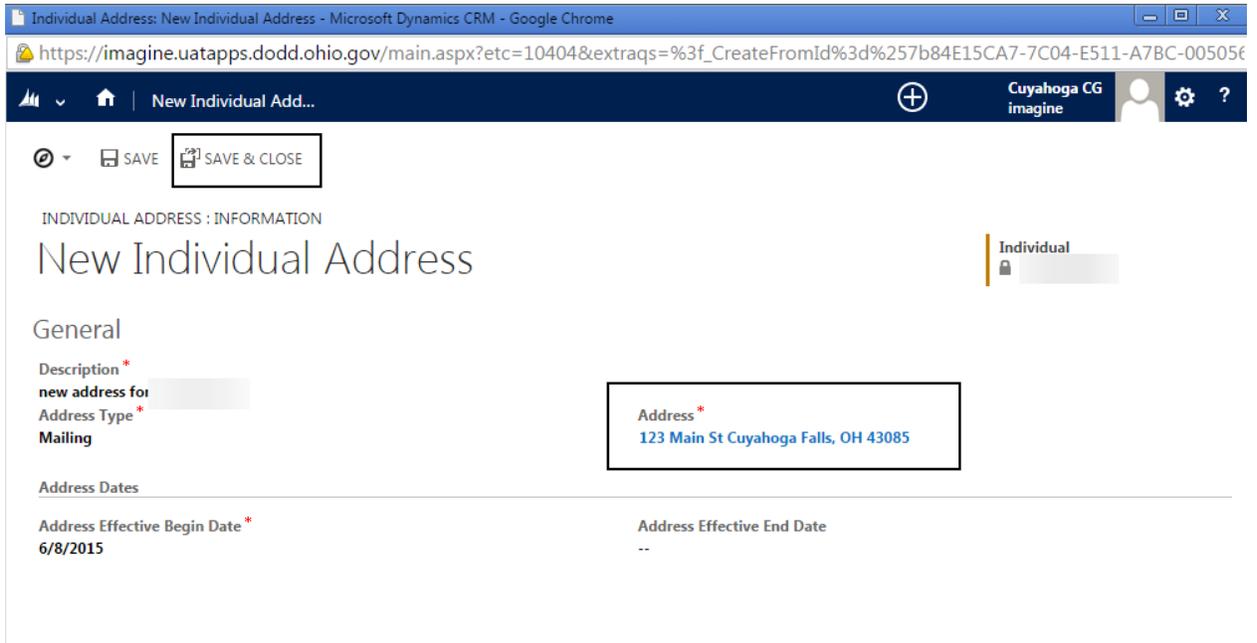
Address Detail

Street1 * 123 Main St City * Cuyahoga Falls
Street2 State * OH
Zip * 43085

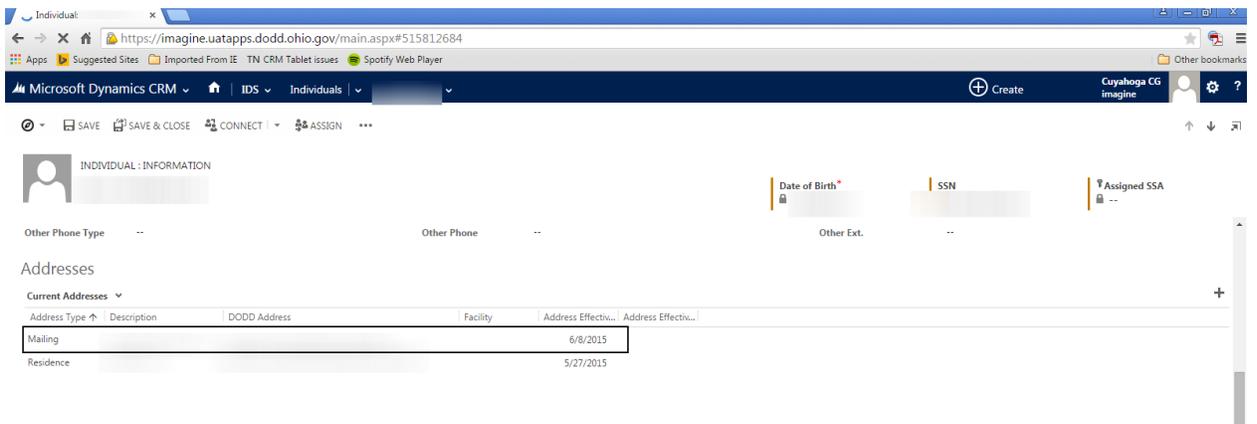
Facility

- f) Now that you are back on the main New Individual Address page, click the **SAVE & CLOSE** button.

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM



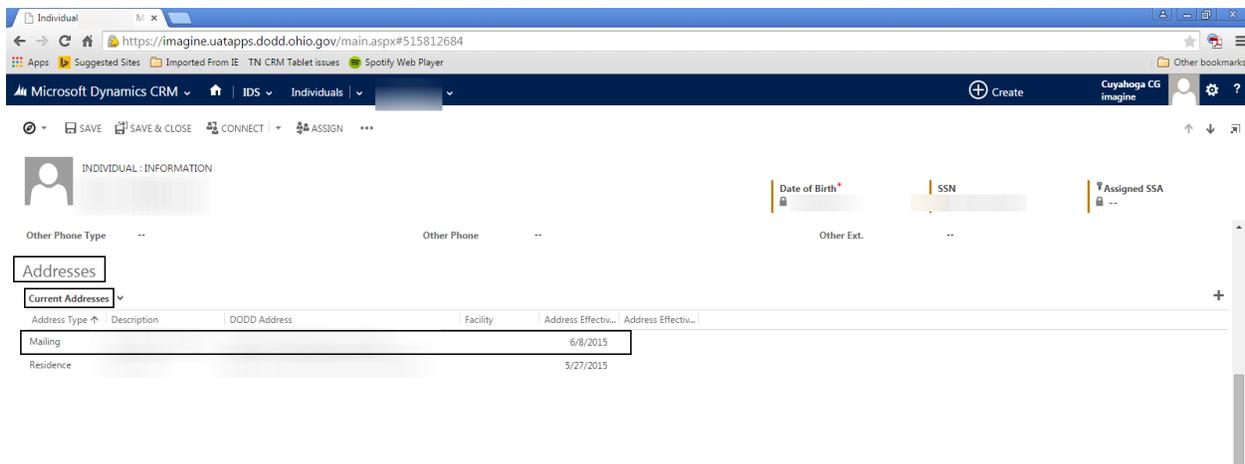
g) You will now see the new address listed under Current Addresses.



Edit Individual Address

13. Edit an Individual Address

- a) While on the Individual Information page scroll down to the Address section. All existing addresses will be displayed under Current Addresses.



- b) Click the field (Hyperlink) called **DODD Address** to open the Individual Address you would like to edit. This will take you directly to the *actual address* information.

Note: Clicking the row instead of the DODD Address will allow you to edit the Description and Address Effective Begin Date but not the Address directly.

Note: Only residence addresses will be updated in the legacy IDS for use by other DODD systems.

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

Individual: - M x
https://imagine.uatapps.dodd.ohio.gov/main.aspx#515812684

Microsoft Dynamics CRM | IDS | Individuals | Create | Cuyahoga CG imagine

SAVE SAVE & CLOSE CONNECT ASSIGN

INDIVIDUAL : INFORMATION

Home Phone -- Home Ext. -- Date of Birth* -- SSN -- Assigned SSA --
Work Phone -- Work Ext. -- Mobile Phone --
Other Phone Type -- Other Phone -- Other Ext. --

Addresses

Current Addresses

Address Type	Description	DODD Address	Facility	Address Effective...	Address Effective...
Mailing				6/8/2015	
Residence				5/27/2015	

Before edit:

Address: 123 Main St Cuy... x
https://imagine.uatapps.dodd.ohio.gov/main.aspx#772245308

Microsoft Dynamics CRM | IDS | Individuals | 123 Main St Cuyaho... | Create | Cuyah imagine

SAVE SAVE & CLOSE DELETE EMAIL A LINK

ADDRESS : INFORMATION
123 Main St Cuyahoga Falls, OH 43085

Address Detail

Street1* 123 Main St City* Cuyahoga Falls
Street2 -- State* OH
Zip* 43085

Facility

After edit:

Address: 123 Main Ave Al... x
https://imagine.uatapps.dodd.ohio.gov/main.aspx#366608556

Microsoft Dynamics CRM | IDS | Individuals | 123 Main Ave Akro... | Create | Cuyah imagine

SAVE SAVE & CLOSE DELETE EMAIL A LINK

ADDRESS : INFORMATION
123 Main Ave Akron, OH 43085

Address Detail

Street1* 123 Main Ave City* Akron
Street2 -- State* OH
Zip* 43085

Facility

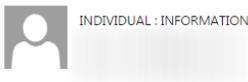
Edit Service and Support

14. Edit (add or remove) Services and Support

a) Scroll down to open the **Services and Support** section of an Individual. Check (or uncheck) the Services and Support checkboxes that are applicable. Click **Save**.

Note: There are business rules that prevent certain combinations of Services and Support from being selected together. In the example below the individual is 82 years old, already has Ohio Department of Aging Day Support and therefore is prevented from having Preschool added as a Services and Support

Ex.



- Front Page
- Addresses
- Additional Demographics
- County Information
- Services and Supports

Date of Birth*
SSN

- 1. Early Intervention
- 2. Preschool
- 3. School Age 82+, but Pre-school selected
- 4. Supported Education
- 5. Childrens Enrichment
- 6. Adult Home Services
- 7. Ohio Department of Aging Day Support
- 8. Adult Day Support

- 9. Vocational Habilitation
- 10. Supported Employment Enclave
- 11. Supported Employment Community
- 12. Self-Determined Supports
- 13. Transportation
- 14. Supported Living
- 15. Service Coordination (SSA)
- 16. Family Supports

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

The screenshot displays the Microsoft Dynamics CRM interface for an individual's record. The browser address bar shows the URL: <https://imagine.uatapps.dodd.ohio.gov/main.aspx#764409567>. The CRM navigation pane includes 'Microsoft Dynamics CRM', 'IDS', and 'Individuals'. The main content area is titled 'INDIVIDUAL: INFORMATION' and includes fields for 'Date of Birth', 'SSN', and 'Assigned SSA'. Below these are sections for 'Front Page', 'Addresses', 'Additional Demographics', and 'County Information'. The 'Services and Supports' section is highlighted with a red box and contains a list of 16 services with checkboxes:

Service	Checked
1. Early Intervention	<input type="checkbox"/>
2. Preschool	<input type="checkbox"/>
3. School	<input type="checkbox"/>
4. Supported Education	<input type="checkbox"/>
5. Childrens Enrichment	<input type="checkbox"/>
6. Adult Home Services	<input type="checkbox"/>
7. Ohio Department of Aging Day Support	<input checked="" type="checkbox"/>
8. Adult Day Support	<input checked="" type="checkbox"/>
9. Vocational Habilitation	<input type="checkbox"/>
10. Supported Employment Enclave	<input type="checkbox"/>
11. Supported Employment Community	<input type="checkbox"/>
12. Self-Determined Supports	<input type="checkbox"/>
13. Transportation	<input checked="" type="checkbox"/>
14. Supported Living	<input type="checkbox"/>
15. Service Coordination (SSA)	<input type="checkbox"/>
16. Family Supports	<input type="checkbox"/>

Below the 'Services and Supports' section are 'Others' (Competitive Employment) and 'Funding Quick Summary' (DODD#, Medicaid ID, Reporting County, CUYA, Active).

Individual Transfer Process (ITR)

15. Follow these steps to complete Individual Transfer Process

- a) **Select Individual** by double clicking on the individual's record to go to the individual detail page and check the reporting county

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

Microsoft Dynamics CRM | IDS | Individuals | Adam Lambert | Create | g Greenecs imagineqa1

CONNECT | EMAIL A LINK | HOSK'S GUID GETTER | RUN WORKFLOW

INDIVIDUAL - INFORMATION
Adam Lambert

Date of Birth* 10/10/1991 | SSN XXX-XX-4521 | Assigned SSA --

Primary Language --
At Home --
If Other, Please Specify: --

County Information

Enrollment Date --	Termination Date --	Reenrollment Date --
Residence County GRE	Reporting County* KNOX	Waiver County --
Individual Waiver Type --	Waiver Status --	Waiver Start Date --
Waiver Waiting List (WL) --	Private Pay Individual (DRA) --	Waiver End Date --
Is DOD Source MUI --	Date Of Death --	PASRR Tracking (PTS) --
Assigned SSA --		Incident Tracking (ITS) --

Associated County Information

Associated County --	Associated County Reason --
Associated County Start Date --	Associated County End Date --

DODD# 9989853 | Medicaid ID | Reporting County KNOX

- b) If individual is not in your county, then **Start the ITR process** for the individual
- c) Click on the dropdown arrow next to individual's name and select the **Individual Transfer Request** tile

Microsoft Dynamics CRM | IDS | Individuals | Adam Lambert | Create | g Greenecs imagineqa1

Common

DOCUMENTS | AUDIT HISTORY | ELIGIBILITY MANAGEMENT | ACTIVITIES | CONNECTIONS | RESTRICTIVE MEASURES N... | **INDIVIDUAL TRANSFER RE...** | BACKGROUND

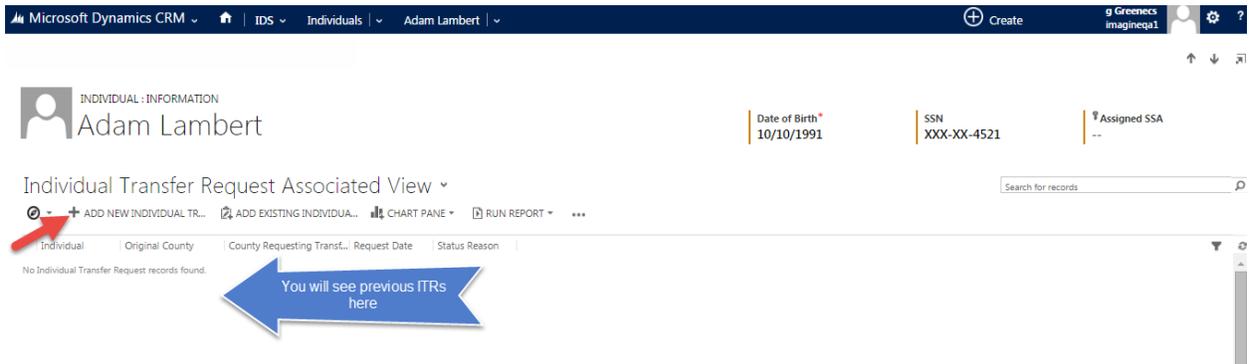
Primary Language --
At Home --
If Other, Please Specify: --

County Information

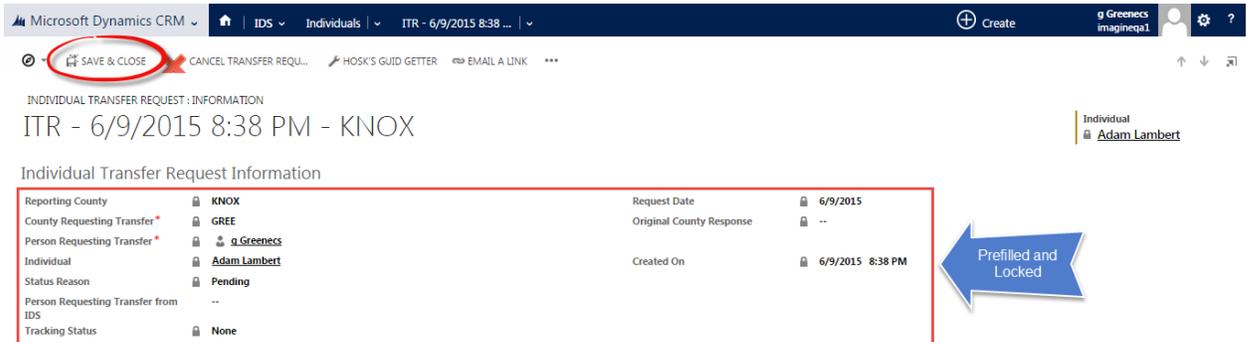
Enrollment Date --	Termination Date --	Reenrollment Date --
Residence County GRE	Reporting County* KNOX	Waiver County --
Individual Waiver Type --	Waiver Status --	Waiver Start Date --
Waiver Waiting List (WL) --	Private Pay Individual (DRA) --	Waiver End Date --
Is DOD Source MUI --	Date Of Death --	PASRR Tracking (PTS) --
Assigned SSA --		Incident Tracking (ITS) --

- d) You will see **Individual Transfer Request Associated view**, where you can view all the ITRs done for that individual. You can also Add new ITR from here by clicking on the **+Add New Individual Transfer Request**

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM



e) ITR form will be created and will open in a new window.
Everything on the form will be prefilled and locked, you just have to click on the Save and Close button



Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

f) ITR will appear under the Individual Associated View and the Status reason will Pending once you do a Save and Close

Microsoft Dynamics CRM | IDS | Individuals | Adam Lambert | Create | g Greenscs imagineqa1

INDIVIDUAL : INFORMATION
Adam Lambert

Date of Birth* 10/10/1991 | SSN XXX-XX-4521 | Assigned SSA --

Individual Transfer Request Associated View

Individual	Original County	County Requesting Trans...	Request Date	Status Reason
Adam Lambert	KNOX	GREE	6/9/2015	Pending

Created ITR will appear here

g) Customer Guide from requesting county and reporting county can change the dashboard view to County Transfer

Microsoft Dynamics CRM | IMAGINE | Dashboards | Create | k KnoxCSG imagineqa1

SAVE AS | NEW | SET AS DEFAULT | REFRESH ALL

County Transfers

- System Dashboards
- Agreement Tracking Dashboard
- Billing Specialist Dashboard
- Budget Support Specialist Financial Dashboard
- County Transfers
- Customer Service Representative Social Dashboard
- Download XML File
- Eligibility Specialist Dashboard
- Evaluator Dashboard
- Financial Approval Dashboard
- Group Manager - Review Statistics
- Group Manager Dashboard
- LOC Analysis Dashboard
- Marketing Social Dashboard
- Microsoft Dynamics CRM Social Platform

Request Date	Created By	Created On
6/9/2015	g Greenscs	6/9/2015 8:38 ...
5/14/2015	g Greenscs	5/14/2015 10:...
5/29/2015	k KnoxCSG	5/29/2015 11:...
6/3/2015	k KnoxCSG	6/3/2015 4:06 ...
6/9/2015	S MDARP	6/9/2015 1:28 ...

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

h) Can view the ITRs on this County Transfer Dashboard

Microsoft Dynamics CRM | IMAGINE | Dashboards | Create | KnoxCSG imagineq1

County Transfers

ITR - Pending State

Individual	Original County	County Request...	Request Date	Created By	Created On
Adam Lambert	KNOX	GREE	6/9/2015	g.Greenecs	6/9/2015 8:38 ...

ITR - Denied

No Individual Transfer Request records found.

i) Click on the record to open the ITR record

Microsoft Dynamics CRM | IMAGINE | Dashboards | ITR - 6/9/2015 8:38 ... | Create | KnoxCSG imagineq1

INDIVIDUAL TRANSFER REQUEST: INFORMATION
ITR - 6/9/2015 8:38 PM - KNOX

Individual Transfer Request Information

Reporting County	KNOX	Request Date	6/9/2015
County Requesting Transfer	GREE	Original County Response	--
Person Requesting Transfer	g.Greenecs	Created On	6/9/2015 8:38 PM
Individual	Adam Lambert		
Status Reason	Pending		
Person Requesting Transfer from IDS	--		
Tracking Status	Dropped		

j) The original county can either Approve or Deny the ITR or the requesting county can Cancel the submitted request

- Requesting county customer guide can click on **Cancel Transfer button (Red Cross)** at the top to cancel your transfer anytime

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

Microsoft Dynamics CRM | IDS | Individuals | ITR - 6/9/2015 8:38... | Create | g.Greenecs imagineqa1

SAVE & CLOSE | CANCEL TRANSFER REQU... | HOSK'S GUID GETTER | EMAIL A LINK

INDIVIDUAL TRANSFER REQUEST: INFORMATION
ITR - 6/9/2015 8:38 PM - KNOX | Individual Adam Lambert

Individual Transfer Request Information

Reporting County	KNOX	Request Date	6/9/2015
County Requesting Transfer*	GREE	Original County Response	--
Person Requesting Transfer*	g.Greenecs	Created On	6/9/2015 8:38 PM
Individual	Adam Lambert		
Status Reason	Pending		
Person Requesting Transfer from IDS	--		
Tracking Status	Dropped		

- Original county customer guide can click on the **Original County Response** field to either **Approve** or **Deny** to approve or deny the ITR respectively

Microsoft Dynamics CRM | IMAGINE | Dashboards | ITR - 6/9/2015 8:38 ... | Create | k.KnoxCSG imagineqa1

SAVE & CLOSE | HOSK'S GUID GETTER | EMAIL A LINK | RUN WORKFLOW

INDIVIDUAL TRANSFER REQUEST: INFORMATION
ITR - 6/9/2015 8:38 PM - KNOX | Individual Adam Lambert

Individual Transfer Request Information

Reporting County	KNOX	Request Date	6/9/2015
County Requesting Transfer*	GREE	Original County Response	Approve
Person Requesting Transfer*	g.Greenecs	Created On	6/9/2015 8:38 PM
Individual	Adam Lambert		
Status Reason	Pending		
Person Requesting Transfer from IDS	--		
Tracking Status	Dropped		

- k) In case the **reporting county doesn't approve or deny the ITR within 14 days**, the Requesting County can claim the Individual record on the 14th day by changing the **Status Reason to "Claimed" on the ITR form**. In such case the requesting county is converted to the reporting county, in this case Greene County.

Abilities for IDS CREATE/ CUSTOMER GUIDE IN CRM

The screenshot shows the Microsoft Dynamics CRM interface for an Individual Transfer Request (ITR). The breadcrumb trail is: Microsoft Dynamics CRM > IDS > Individuals > ITR - 6/9/2015 8:38... The page title is "INDIVIDUAL TRANSFER REQUEST : INFORMATION" and the specific request is "ITR - 6/10/2015 2:01 PM - KNOX". The user is identified as "Adam Lambert".

Individual Transfer Request Information

Reporting County	KNOX	Request Date	5/26/2015
County Requesting Transfer*	GREE	Original County Response	--
Person Requesting Transfer*	g.Greenecs	Created On	5/26/2015 2:01 PM
Individual	Adam Lambert		
Status Reason	Claimed		
Person Requesting Transfer from IDS	--		
Tracking Status	Claimed		

A red arrow points to the "Claimed" status in the Tracking Status field.

l) If the **reporting county** neither **approve/deny the ITR** and it is **not claimed by the requesting county** within another **30 days (total 44 days from the request date)**, then the System **will automatically drop the ITR** and the Tracking Status will be changed to **Dropped**

The screenshot shows the Microsoft Dynamics CRM interface for an Individual Transfer Request (ITR). The breadcrumb trail is: Microsoft Dynamics CRM > IDS > Individuals > ITR - 6/9/2015 8:38... The page title is "INDIVIDUAL TRANSFER REQUEST : INFORMATION" and the specific request is "ITR - 6/9/2015 8:38 PM - KNOX". The user is identified as "Adam Lambert".

Individual Transfer Request Information

Reporting County	KNOX	Request Date	6/9/2015
County Requesting Transfer*	GREE	Original County Response	--
Person Requesting Transfer*	g.Greenecs	Created On	6/9/2015 8:38 PM
Individual	Adam Lambert		
Status Reason	Dropped		
Person Requesting Transfer from IDS	--		
Tracking Status	Dropped		

A blue arrow points to the "Dropped" status in the Tracking Status field.

Disclaimer - All data in this document is fictitious and/or redacted