

User Guide for CRM – IDS & LOC

Individual Data System (IDS) and Level
of Care (LOC) System

The Level of Care (LOC) system is designed to process and manage developmental disabilities level of care determinations for persons seeking enrollment in DODD's home and community based services (HCBS) Waivers and admissions to an intermediate care facility for individuals with intellectual disabilities (ICF/IID).



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Developmental Disabilities

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OVERVIEW for LOC

The Level of Care (LOC) system is designed to process and manage developmental disabilities level of care determinations for persons seeking enrollment in DODD's home and community based services (HCBS) Waivers and admissions to an intermediate care facility for individuals with intellectual disabilities (ICF/IID).

OVERVIEW for IDS

The Department's Individual Data System (IDS) is being rewritten to help accommodate increased integration with various systems within the Ohio Department of Developmental Disabilities and the new Ohio Department of Medicaid's (ODM) eligibility system, Ohio Benefits. The first step of the IDS rewrite is to have all of the demographic pieces of the each Individual record be created and edited in the new CRM platform.

PURPOSE

The purpose of this User Guide is to provide a detailed list of functionality and guidance – based on functional roles -- that can be performed by County Board of Development Disabilities(CBDD) Or Council of Governments(COGS) users to create/edit individuals records, request county to county transfers of individuals records and to identify an individual's County Board Eligibility. The users upon certification as an evaluator by DODD can submit and manage level of care assessments for individuals seeking enrollment into DODD's HCBS Waivers and admission to an ICF. The LOC Process allows County boards to have the option for using the LOC assessment tool for determining County Board Eligibility for individuals 10 and above.

PREREQUISITES

In order to access the LOC Process application, Users must have a registered account with DODD before accessing the LOC application. Users can register their account here:

County Boards: <https://registerassociate.uatapps.dodd.ohio.gov>

It is advised to use Internet Explorer (version 10 or higher) or Google Chrome.



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



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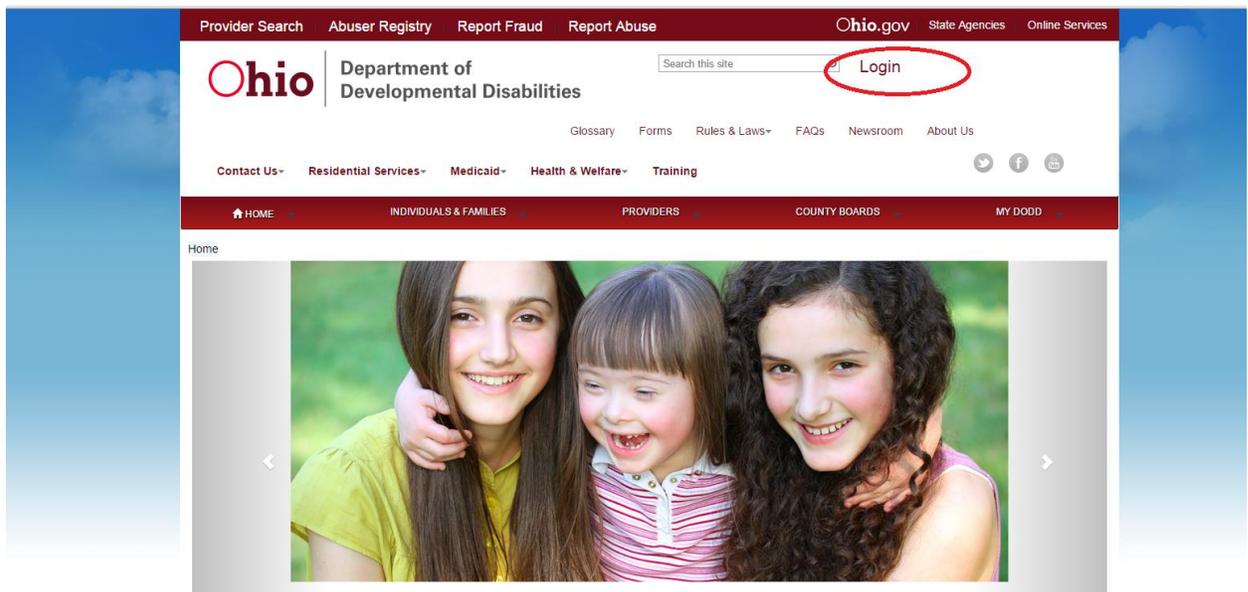


County Boards Roles

1. Customer Service Guide - CSG (IDS Create)

Login

1. **Open Your Browser** (internet explorer or chrome)
2. Click on login from DODD Home Page



3. **Enter your User Name and Password**
(Role: Customer Guide)



4. Select IDS/CRM from the dropdown of the applications available

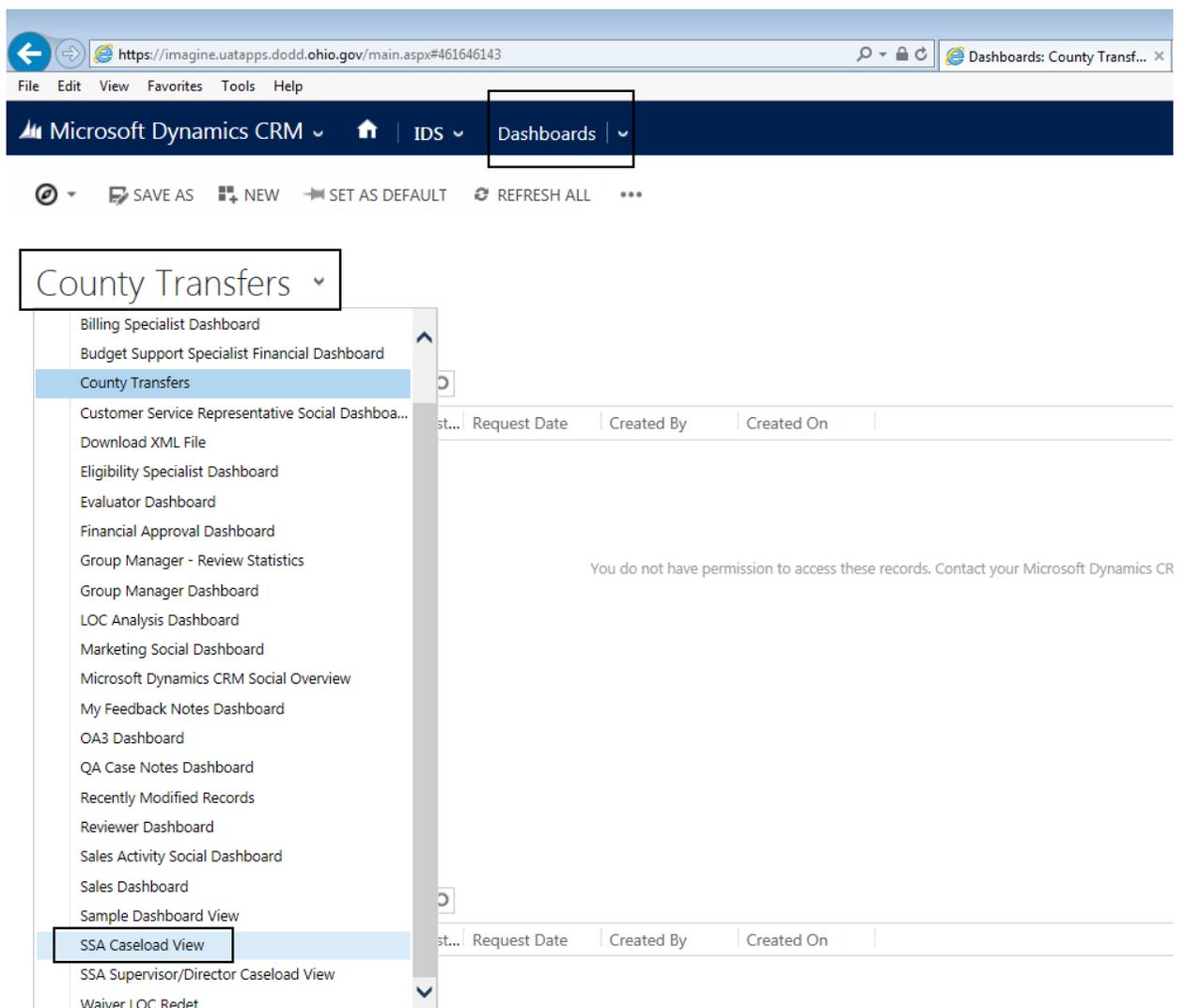
Dashboard

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

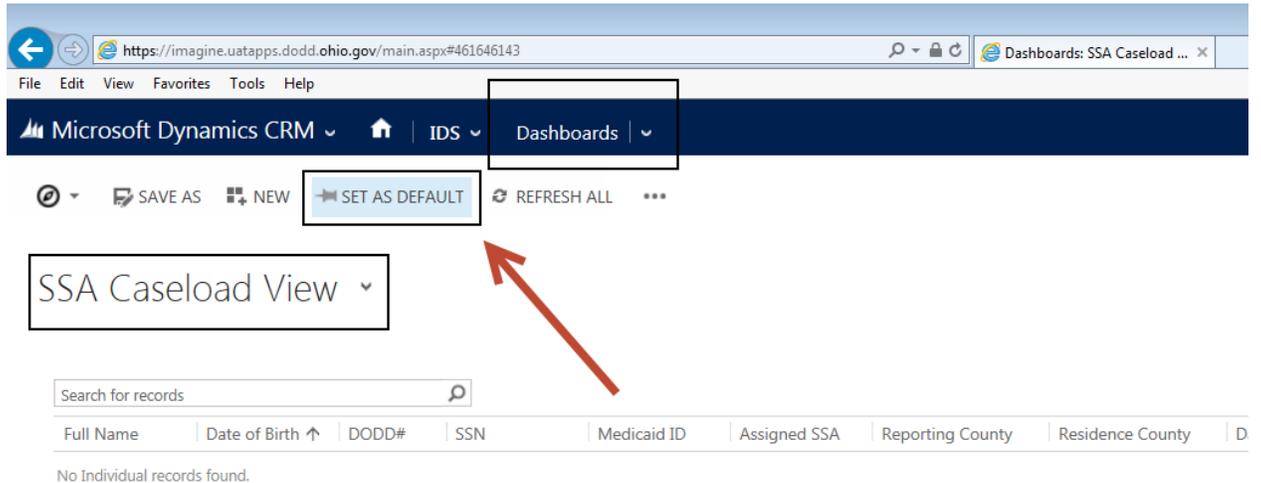


6. If you don't see the SSA Caseload View:

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



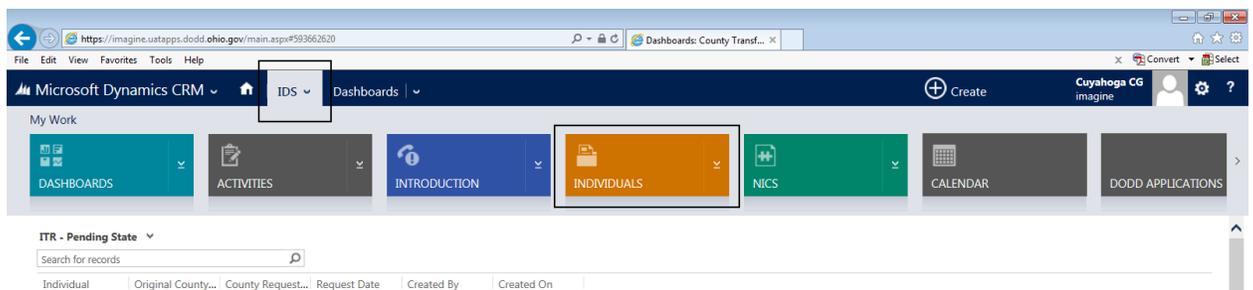
d) Finally, click on “Set as Default” on top of this dashboard page if you wish to pin this as your **Home** landing page.



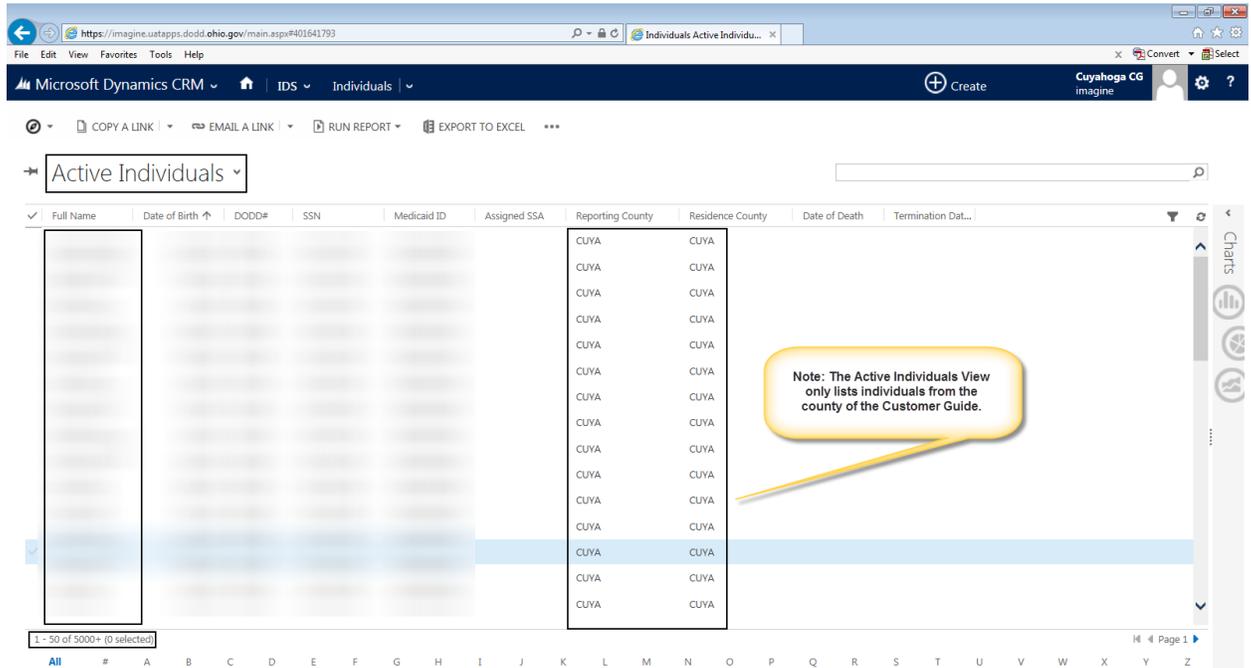
Access Individual

7. To access list of individuals in your county:

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



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



Search Individual

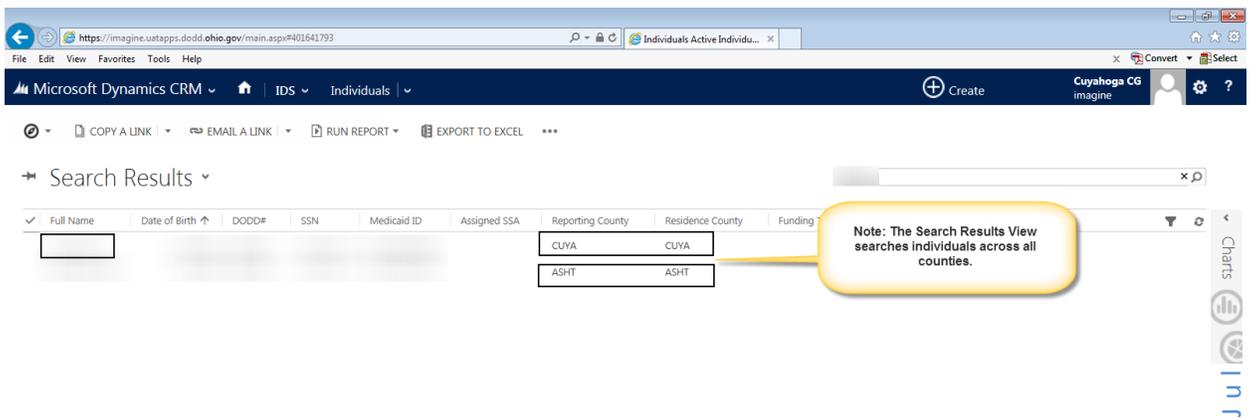
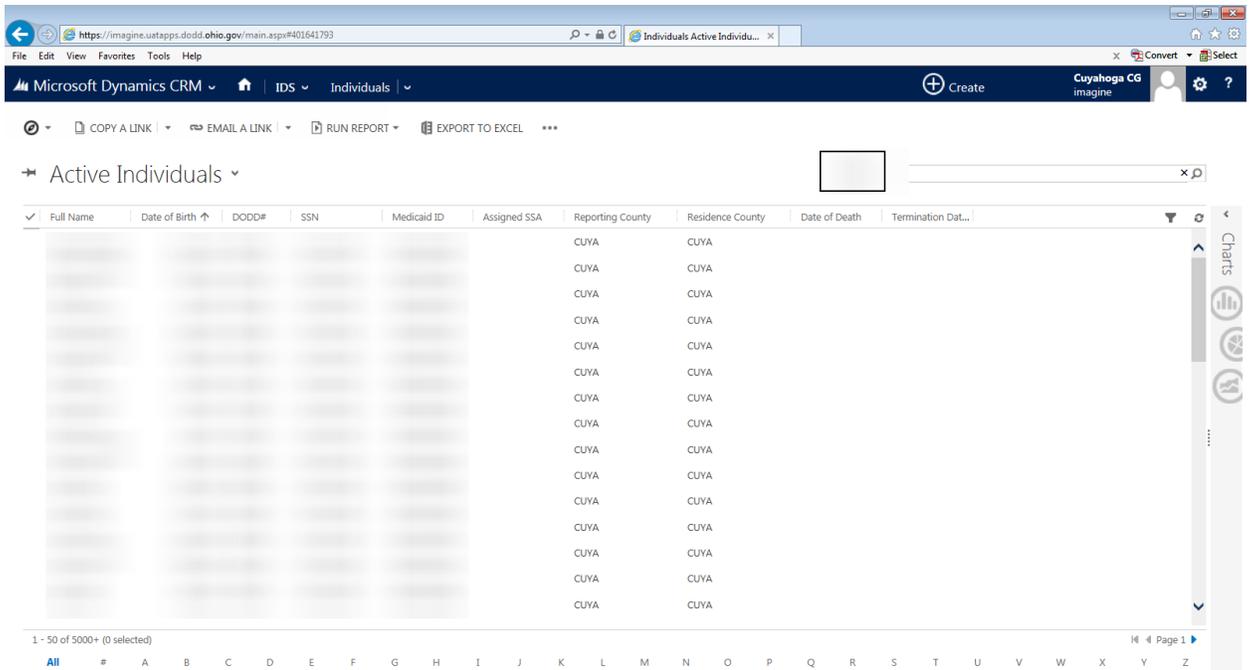
8. Follow these steps to Individual Search

- I. 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.

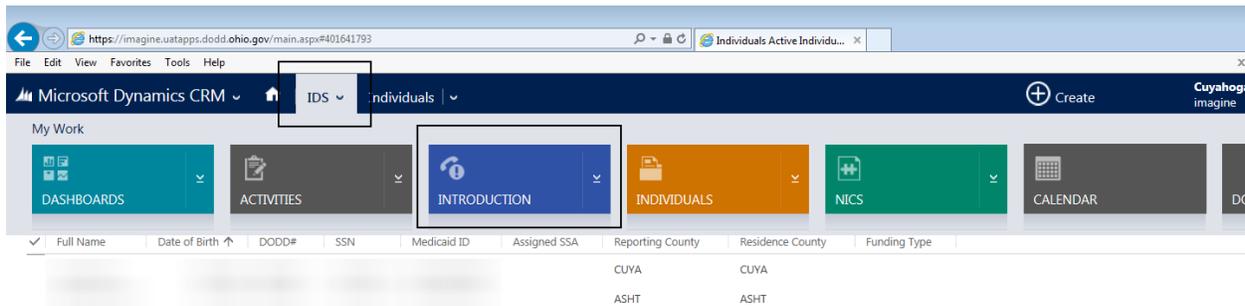
- II. Hit **Enter** or click on the magnifying glass to search
- III. Individual record(s) will be displayed if an individual exists in any of the 88 counties.



Start Individual Create Process

9. Follow these steps to Create New Individual

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



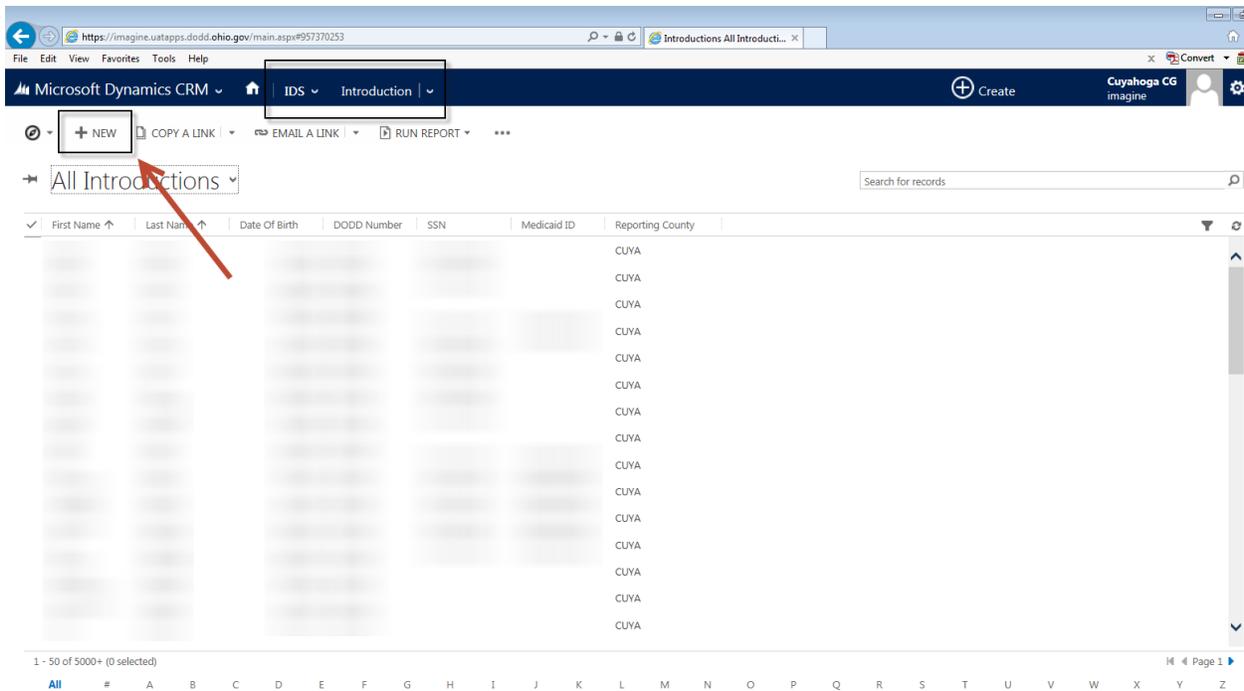
- b) The **All Introductions** View displays introductions from the county of the Customer Guide only.



Create Introduction

10. Follow these steps to Create Introduction

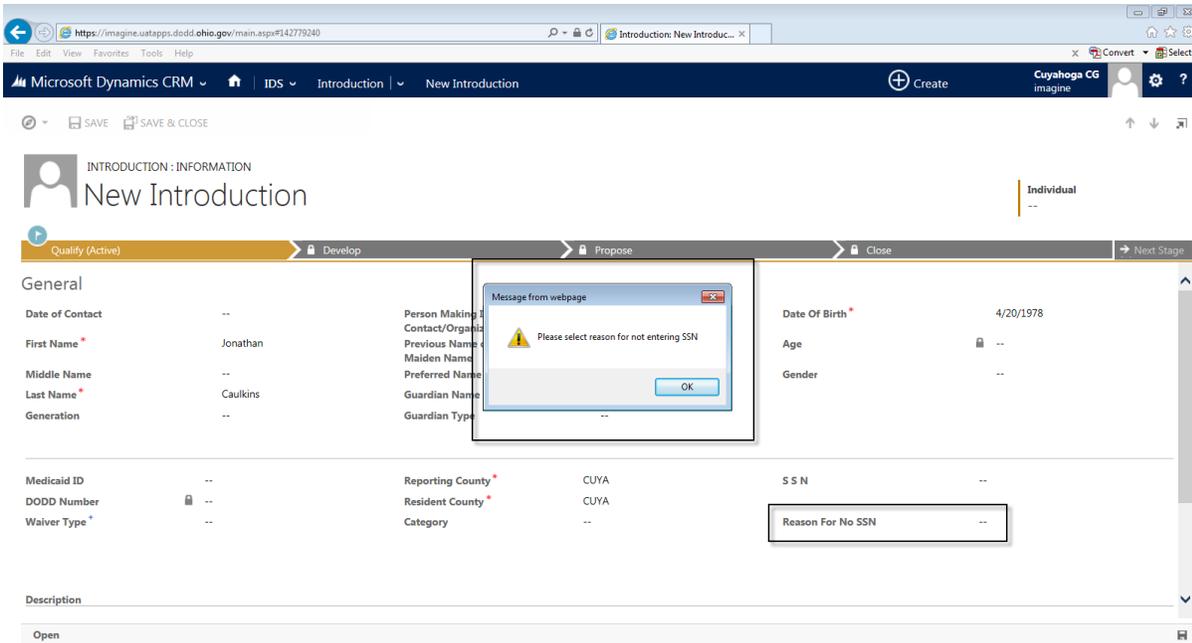
- a) Click on the **+ NEW** button on the left top corner of the Introduction page to create a new introduction



- b) 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.

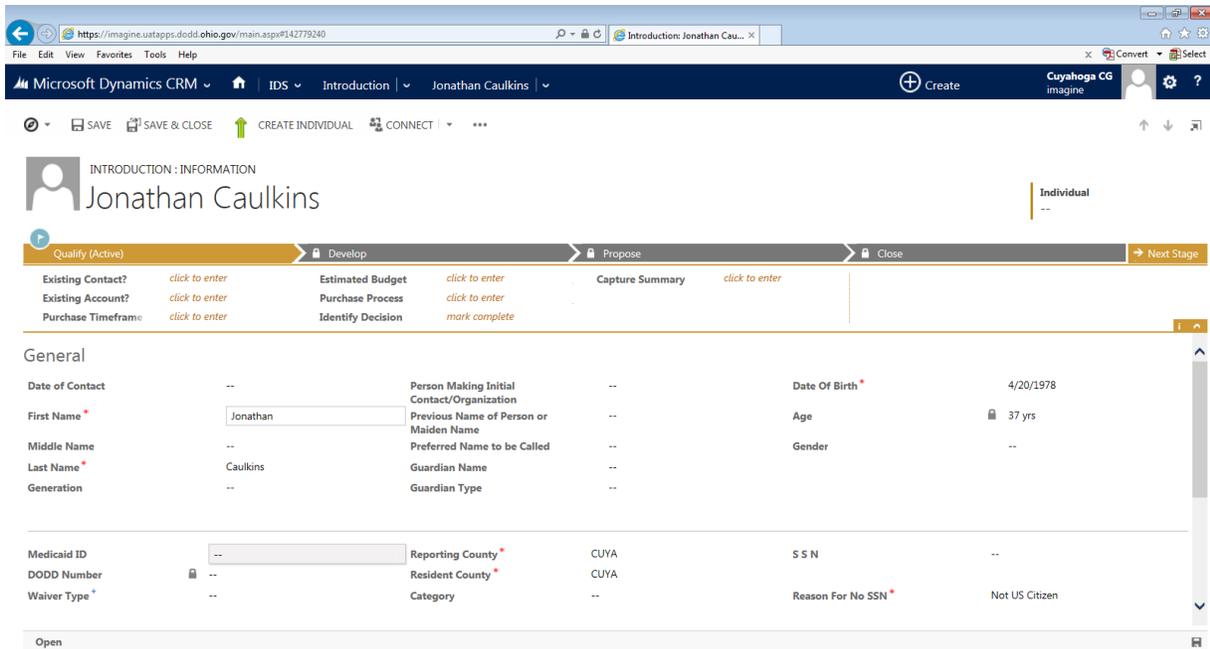
Note: *Required* fields are denoted with a red (*).





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



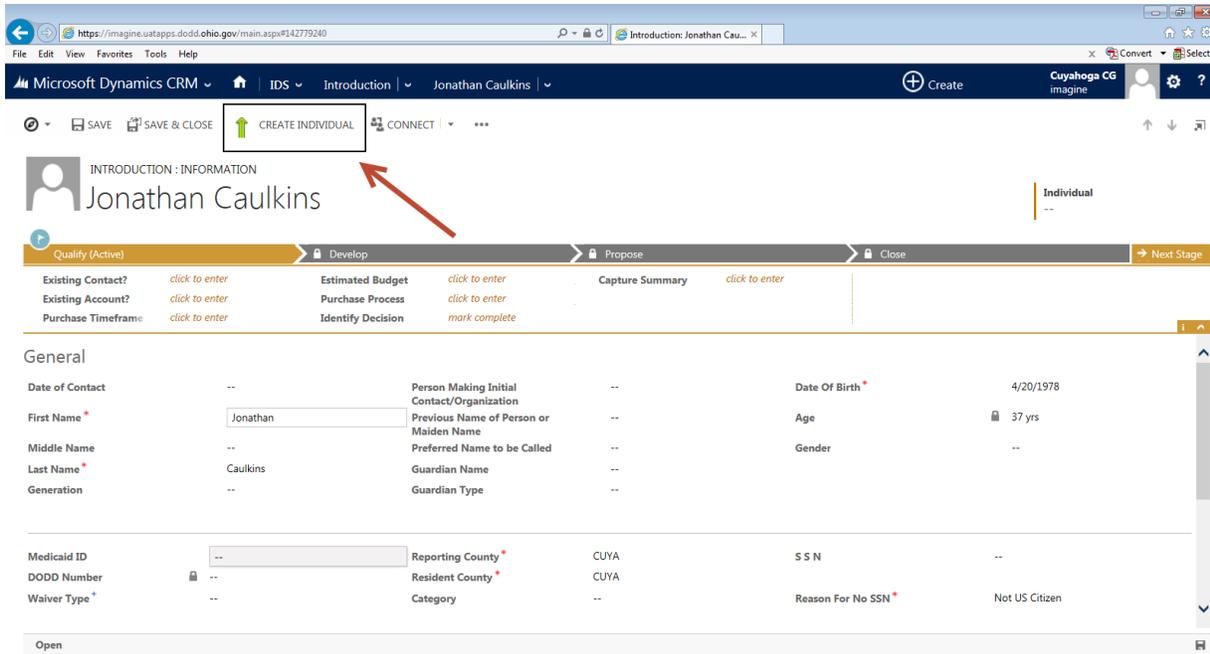


Create Individual

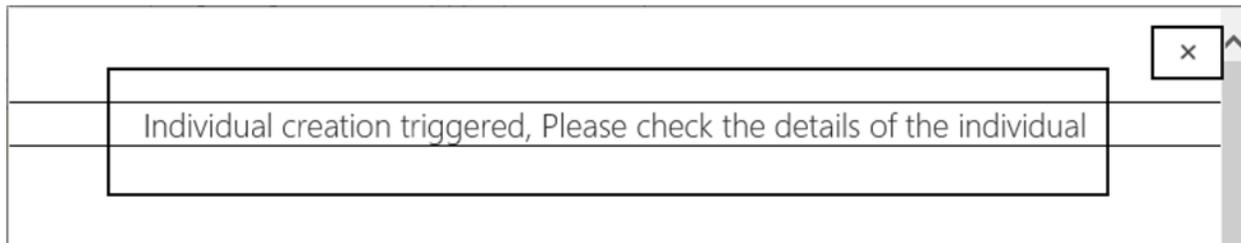
11. Follow these steps to Create Individual in IDS

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





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.



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.

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.

Search:

Previous Next

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



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.

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

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.

Individual Creation triggered

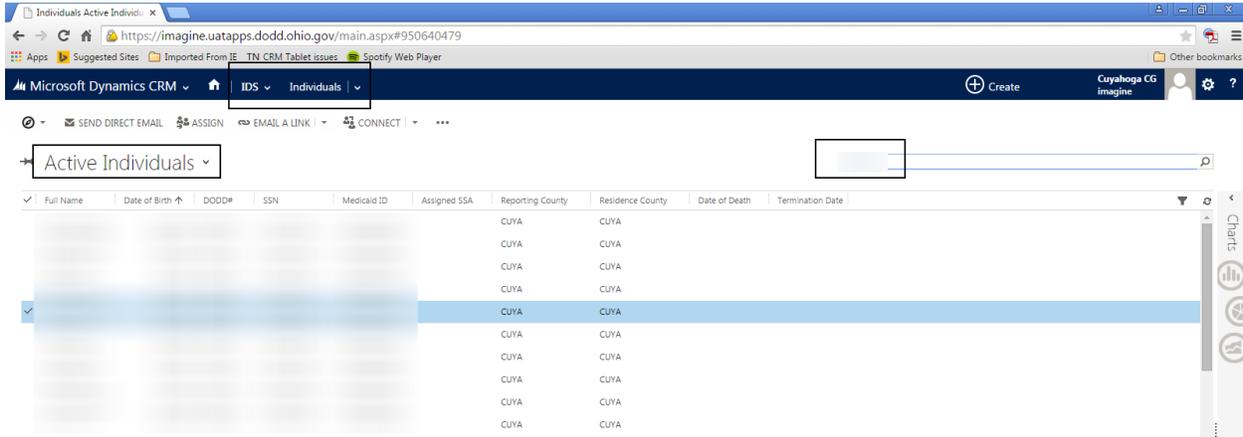
Search Individual

12. Follow these steps to Search for individual

- I. Search for an individual by entering search criteria in the search box. Fields available to search on include: First

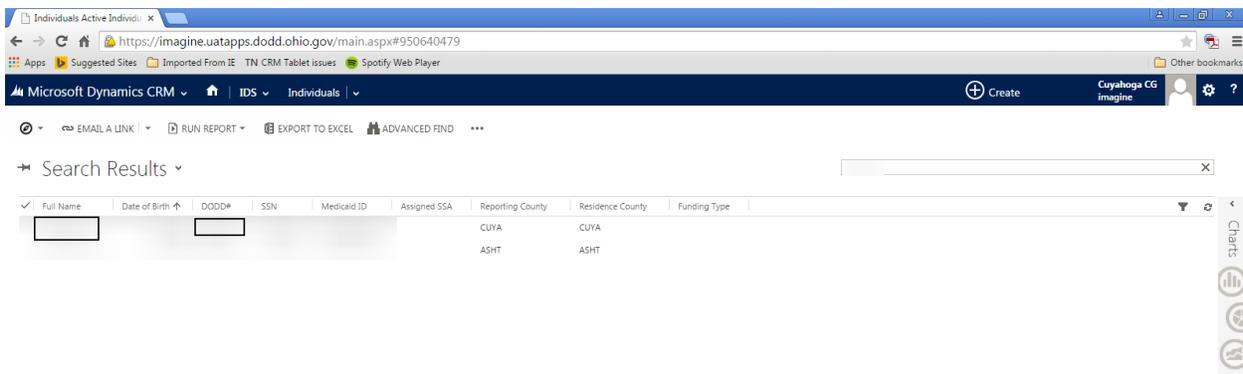


Name, Last Name, Full Name (Ex. Jonathan Dawkins),
Date of Birth, Medicaid #, SSN and DODD#.



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

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



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

The screenshot shows the 'Individual: Information' page in Microsoft Dynamics CRM. The page is divided into several sections:

- Individual Information:** Includes fields for Date of Birth, SSN, and Assigned SSA.
- Front Page:** Includes fields for Current As Of (6/1/2015), Email, First Name, Middle Name, Last Name, and Generation.
- Phone Information:** Includes fields for Home Phone, Work Phone, Other Phone Type, Home Ext., Work Ext., Other Phone, Mobile Phone, and Other Ext.
- Addresses:** A section for entering addresses.
- Additional Demographics:** A section for additional demographic information.
- Individual IDs:** Includes fields for DODD#, Medicaid ID, and Local ID Numbers.

Two red arrows in the image point to the 'Individual IDs' section and the 'Front Page' section.

Edit Individual's Information

13. Edit an Individual's Front Page information

- I. 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.



Before edit:

Individual: INFORMATION

Front Page

Current As Of: 6/1/2015

Email

First Name * [Redacted]
Middle Name * [Redacted]
Last Name * [Redacted]
Generation: --

Date Of Birth * [Redacted]
Age: [Redacted]
Full Name: [Redacted]

Phone Information

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

Addresses

Additional Demographics

Individual IDs

DODD#	[Redacted]	SSN	[Redacted]
Medicaid ID:	[Redacted]		
Local ID Numbers	[Redacted]		
DODD#	[Redacted]	Medicaid ID	[Redacted]
		Reporting County	CUYA

Active

After edit:

Individual: INFORMATION

Front Page

Current As Of: 6/8/2015

Email

First Name * [Redacted]
Middle Name * [Redacted]
Last Name * [Redacted]
Generation: --

Date Of Birth * [Redacted]
Age: [Redacted]
Full Name: [Redacted]

Phone Information

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

Addresses

Additional Demographics

Individual IDs

DODD#	[Redacted]	SSN	[Redacted]
Medicaid ID:	[Redacted]		
Local ID Numbers	[Redacted]		
DODD#	[Redacted]	Medicaid ID	[Redacted]
		Reporting County	CUYA

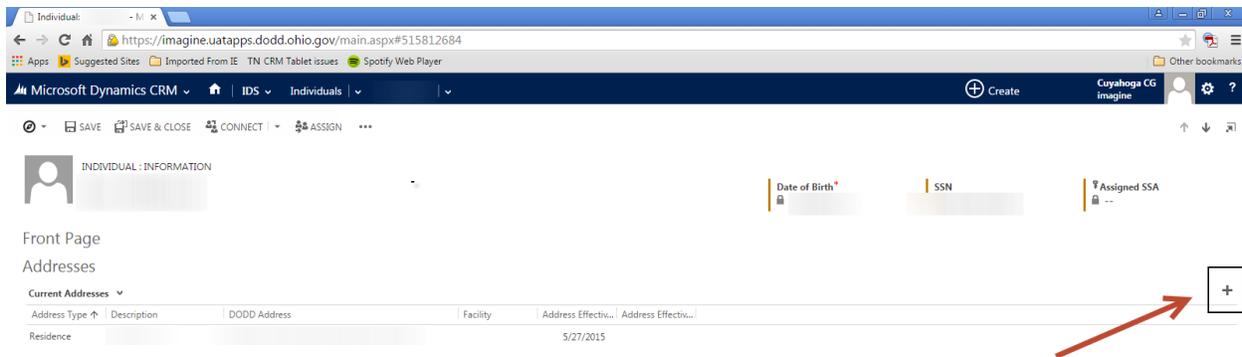
Active



Add Address

14. Add an Individual's Address information

- I. Expand the Address section of the Individual
- II. Click the Plus sign at the right top of this section to go to



- III. 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**



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

IV. Click the **+New** button



- V. 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

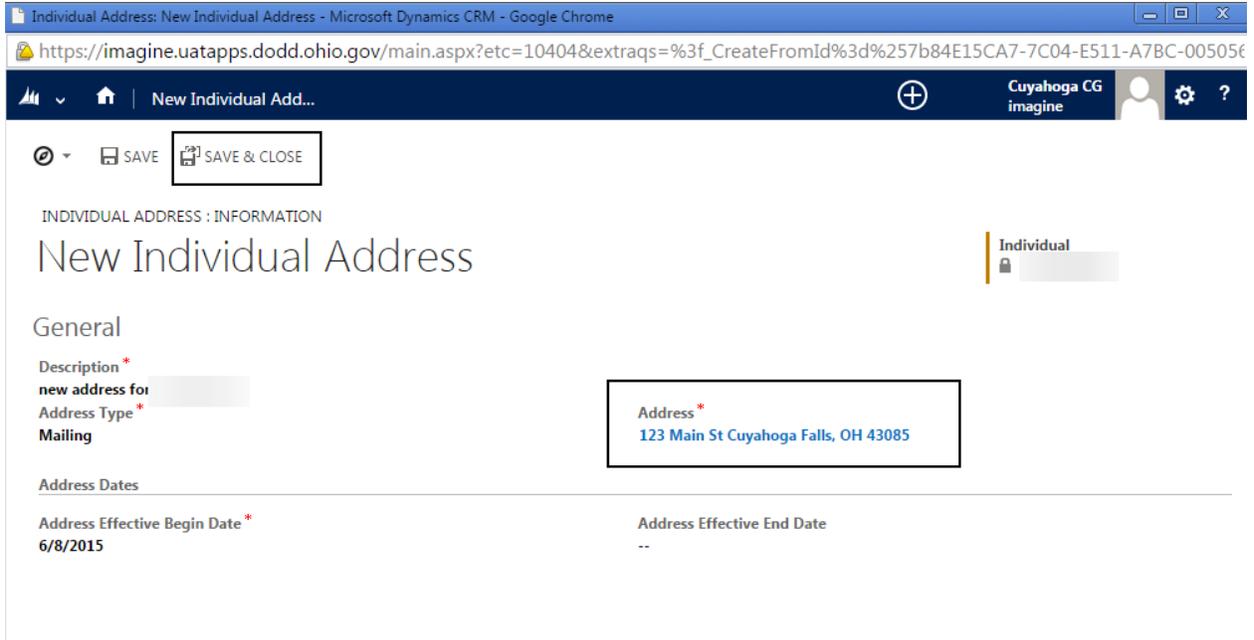
Zip* 43085

Facility

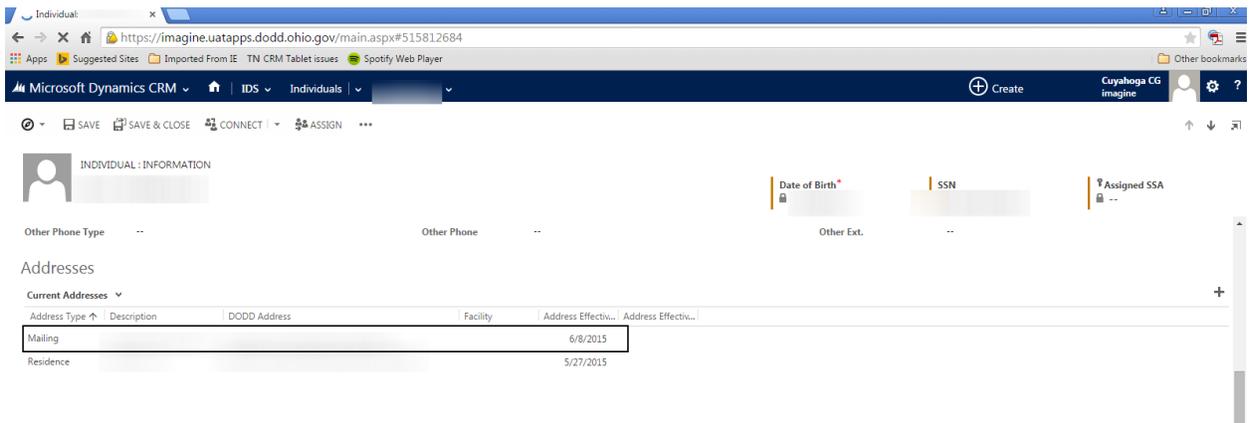
SAVE SAVE & CLOSE

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



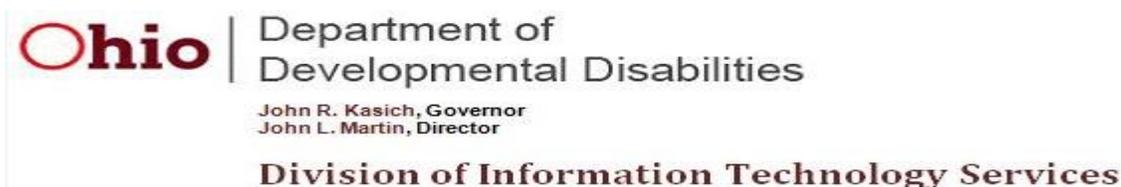


VII. You will now see the new address listed under Current Addresses.

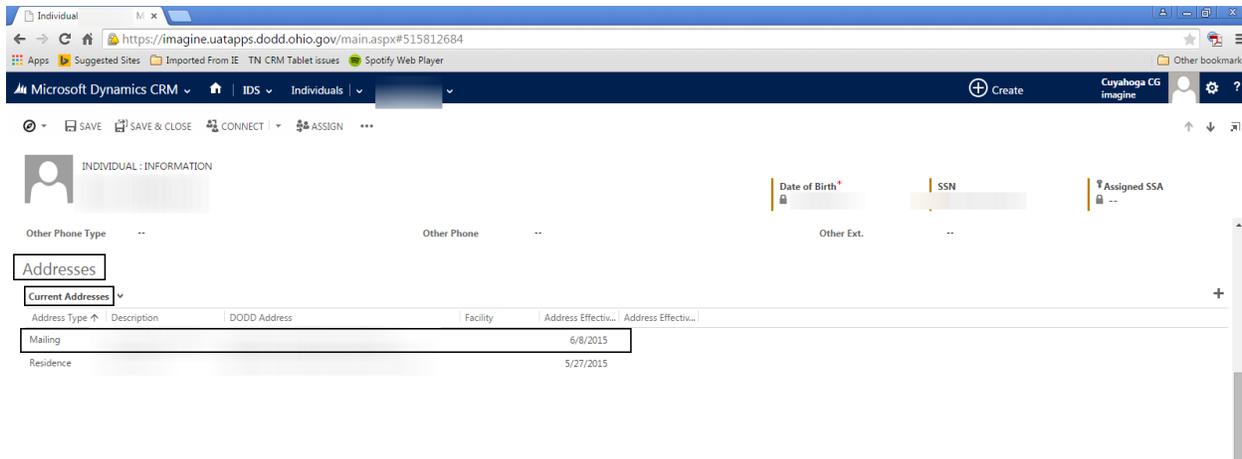


Edit Individual Address

15. Edit an Individual Address



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

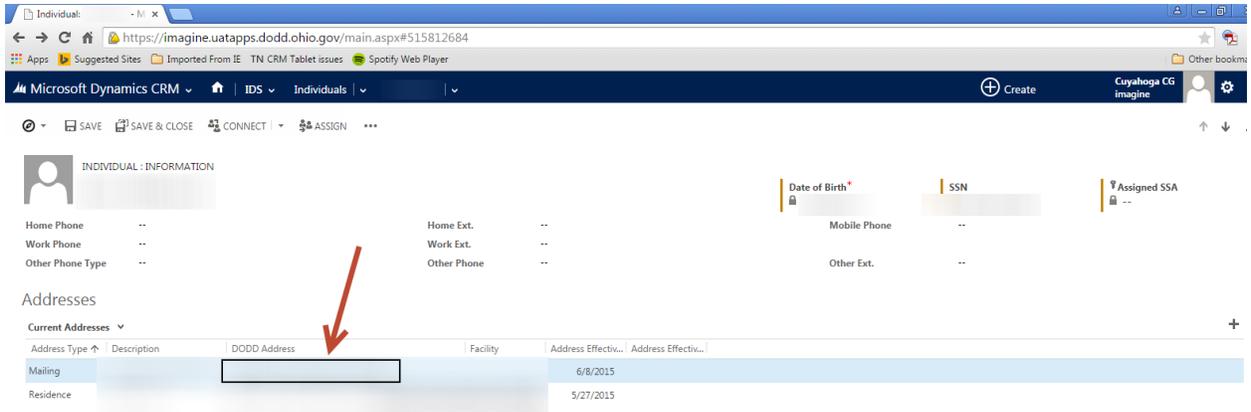


- ii. Click the field (Hyperlink) called **DODD Address** to open the Individual Address you would like to edit. This will take you directly to the *actual address* information.

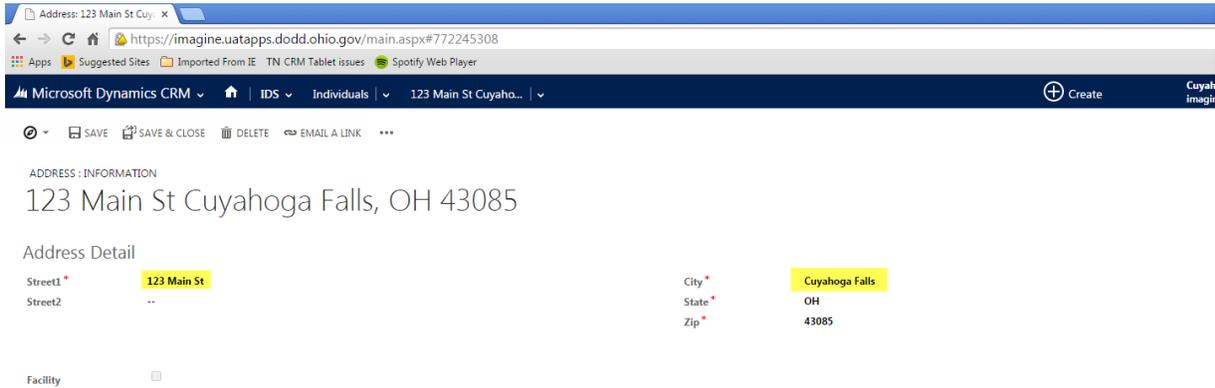
Note: Clicking the row instead of the DODD Address will allow you to edit the Description and Address Effective Begin Date but not the Address directly.

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

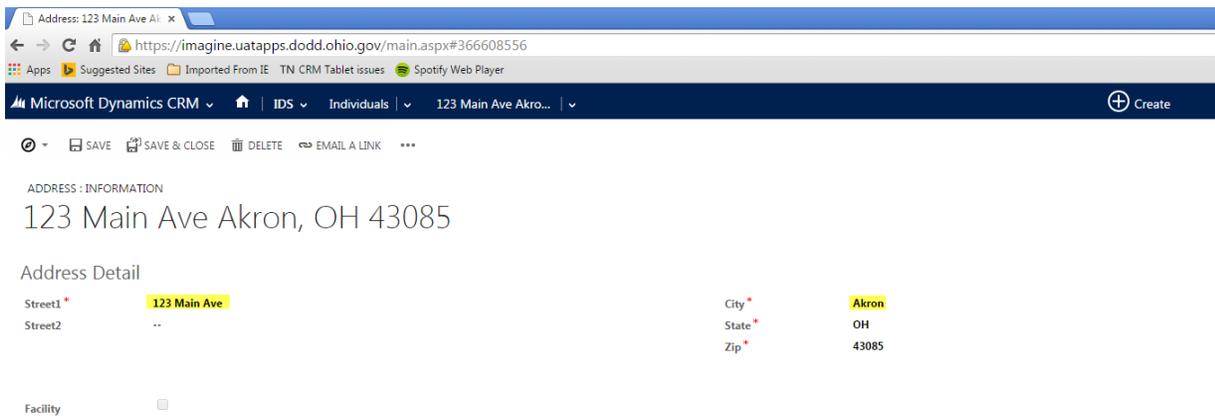




Before edit:



After edit:



Edit Service and Support

16. Edit (add or remove) Services and Support

1. 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.

INDIVIDUAL : INFORMATION

Date of Birth* SSN XX

Front Page
Addresses
Additional Demographics
County Information
Services and Supports

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

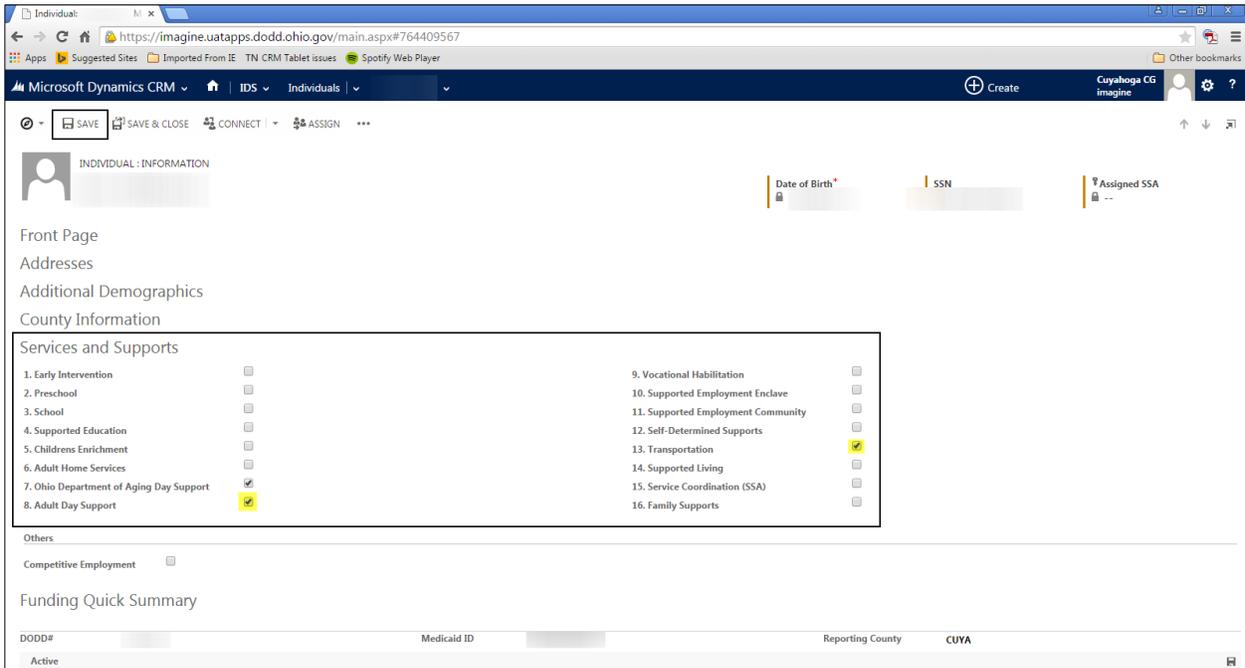


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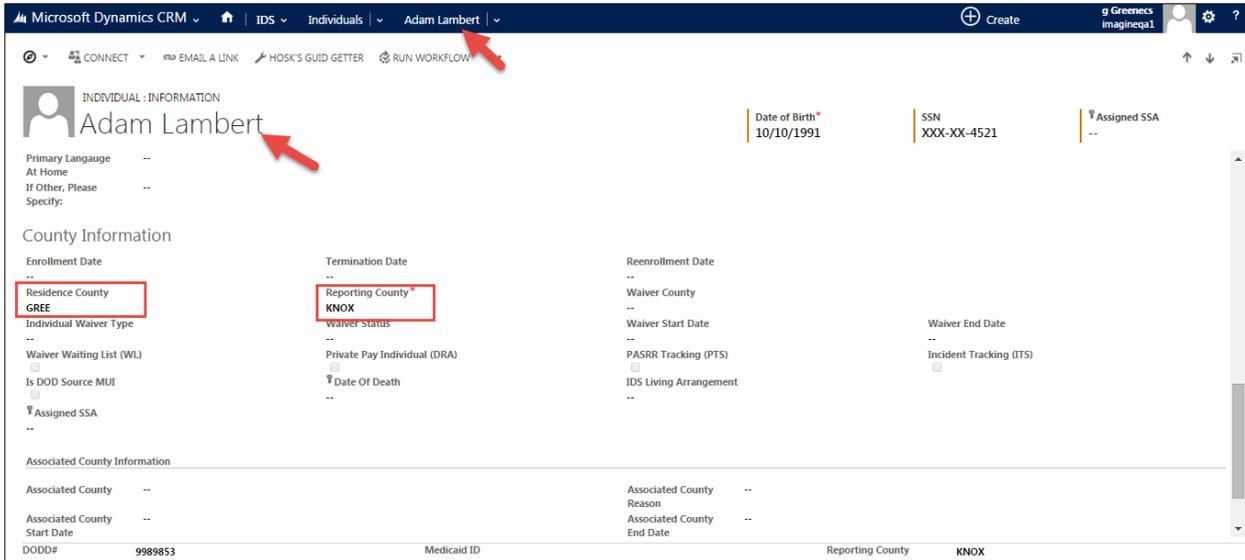


Individual Transfer Process (ITR)

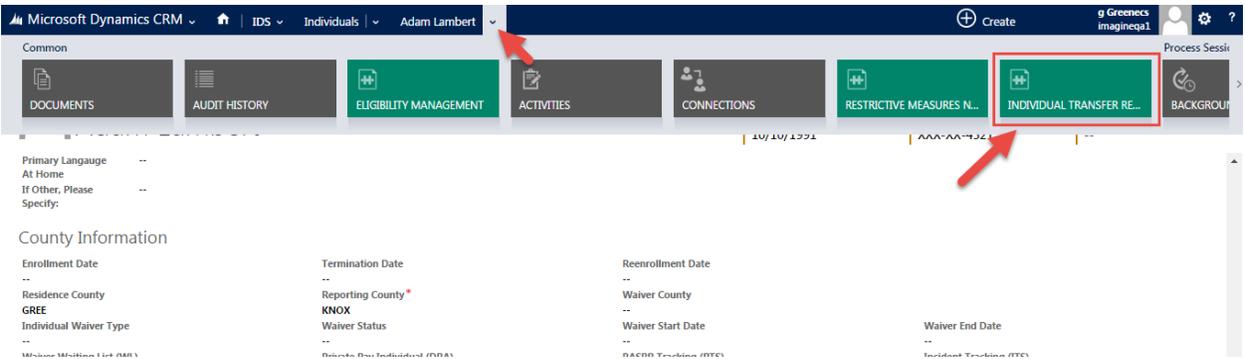
17. Follow these steps to complete Individual Transfer Process

- I. **Select Individual** by double clicking on the individual’s record to go to the individual detail page and check the reporting county



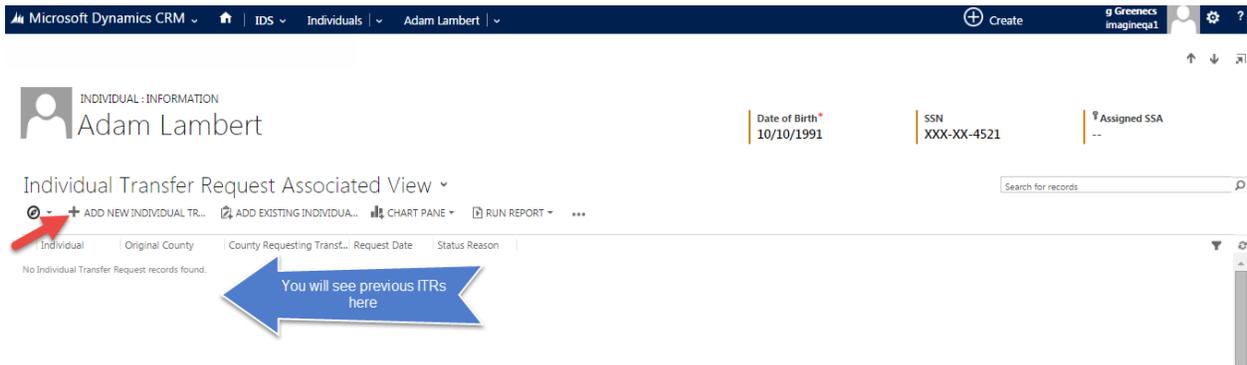


- II. If individual is not in your county, then **Start the ITR process** for the individual
- III. Click on the dropdown arrow next to individual’s name and select the **Individual Transfer Request** tile

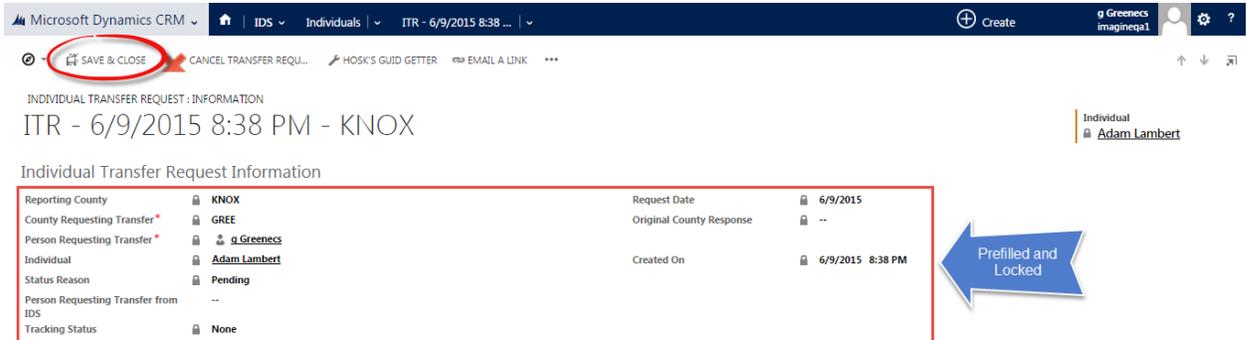


- IV. You will see **Individual Transfer Request Associated view**, where you can view all the ITRs done for that individual. You can also Add new ITR from here by clicking on the **+Add New Individual Transfer Request**





- V. 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**



- VI. 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 Greenecs imagineq1

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 Transf...	Request Date	Status Reason
Adam Lambert	KNOX	GREE	6/9/2015	Pending

Created ITR will appear here

VII. Customer Guide from requesting county and reporting county can change the dashboard view to County Transfer

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

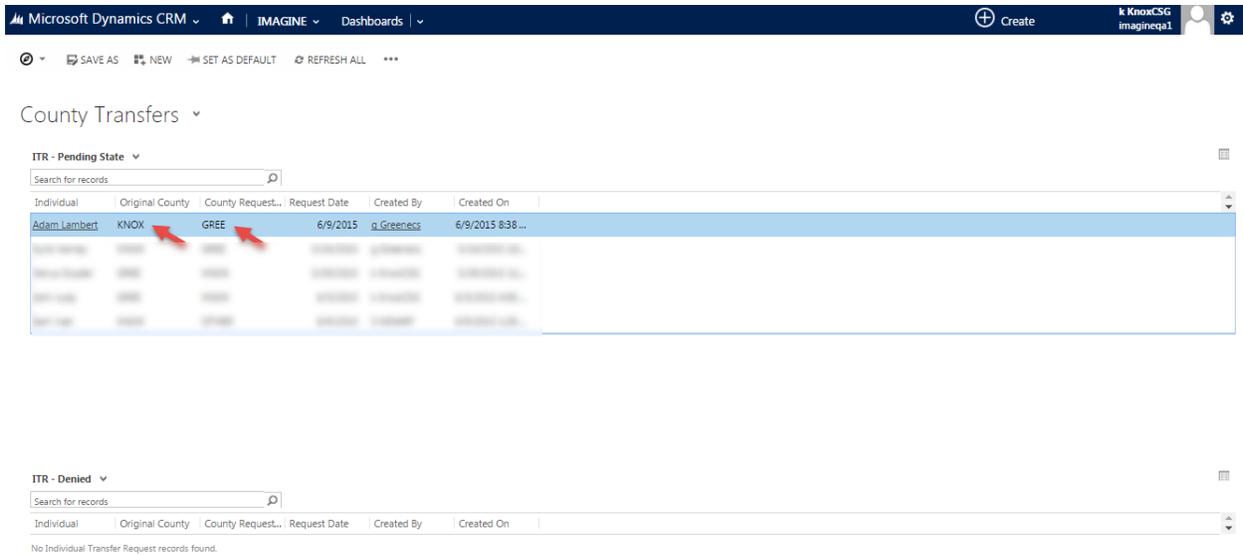
SAVE AS | NEW | SET AS DEFAULT | REFRESH ALL

County Transfers

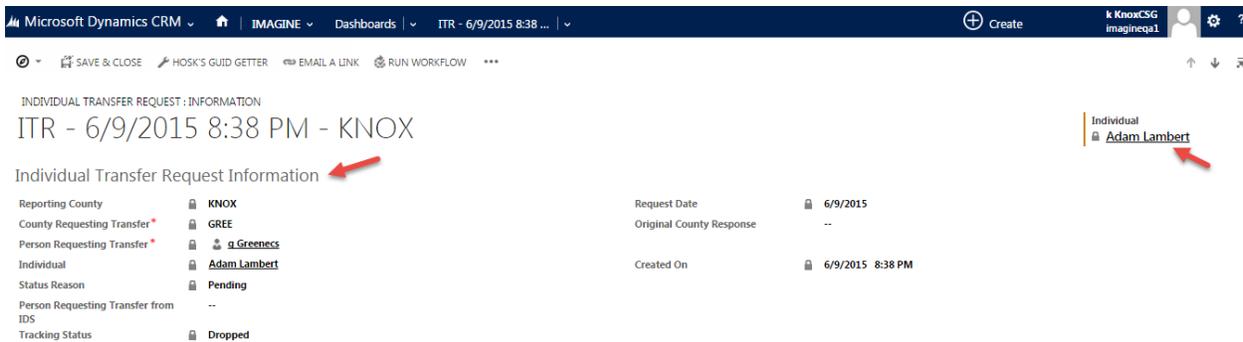
Request Date	Created By	Created On
6/9/2015	g Greenecs	6/9/2015 8:38 ...
5/14/2015	g Greenecs	5/14/2015 10:...
5/29/2015	k KnoxCSG	5/29/2015 11:...
6/3/2015	k KnoxCSG	6/3/2015 4:06 ...
6/9/2015	S MDARP	6/9/2015 1:28 ...

VIII. Can view the ITRs on this County Transfer Dashboard



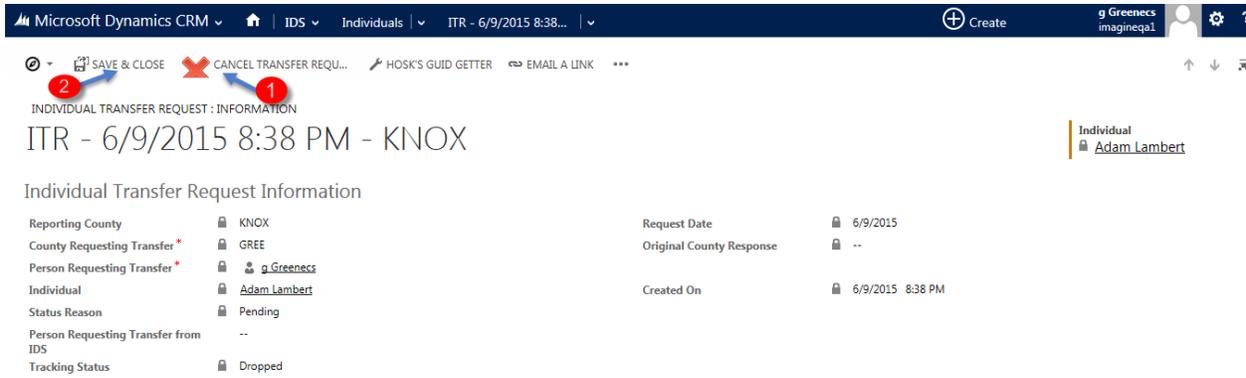


IX. Click on the record to open the ITR record

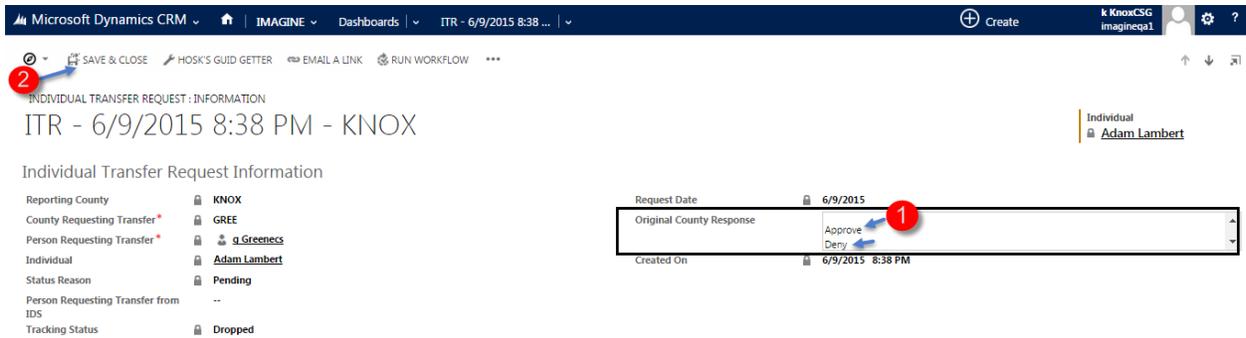


- X. The original county can either Approve or Deny the ITR or the requesting county can Cancel the submitted request
- Requesting county customer guide can click on **Cancel Transfer button (Red Cross)** at the top to cancel your transfer anytime





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



XI. 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.

July 1, 2015



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

SAVE & CLOSE 2 | CANCEL TRANSFER REQU...

INDIVIDUAL TRANSFER REQUEST : INFORMATION | ITR - 6/10/2015 2:01 PM - KNOX | Individual 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	Pending		
Tracking Status	Claimed		

XII. 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**

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

SAVE & CLOSE

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

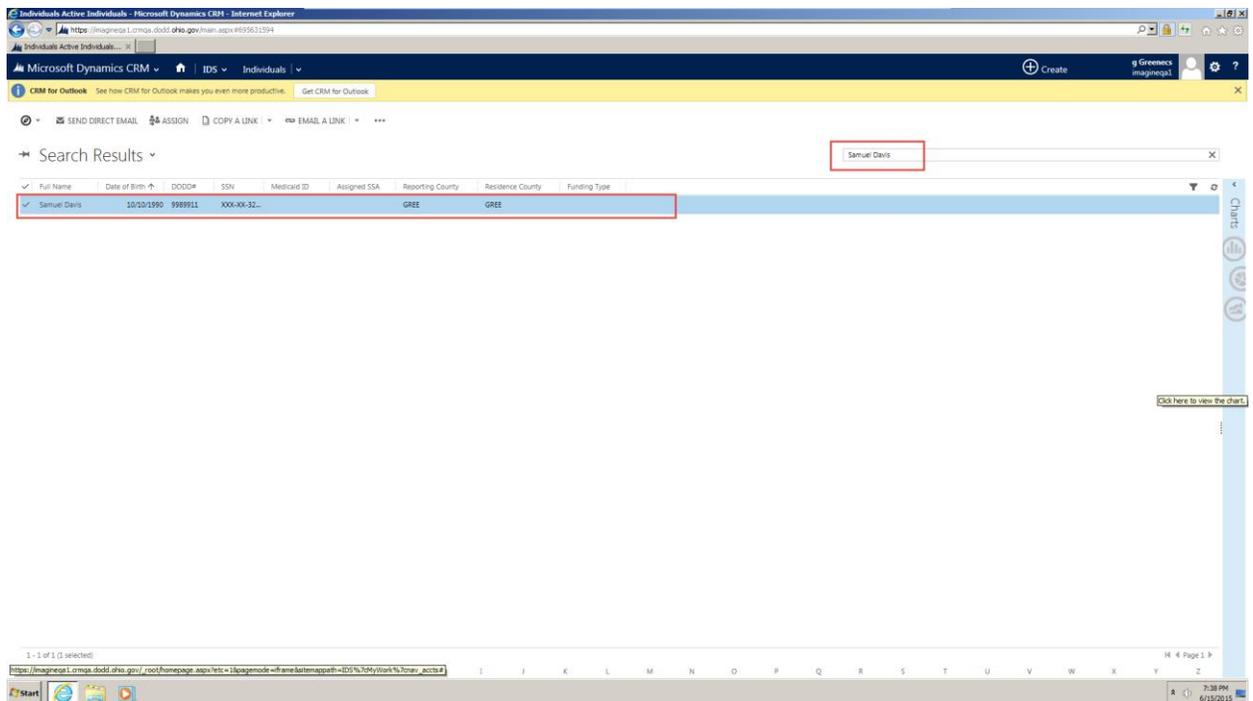
Individual Transfer Request Information

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	Dropped		
Person Requesting Transfer from IDS	--		
Tracking Status	Dropped		



Decision Tree for County Board Eligibility

1. To start county board eligibility for an Individual, **Search for individual** by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box
3. **Individual record will show up** if individual exist in your county



4. Double click on individual record to open individual's record

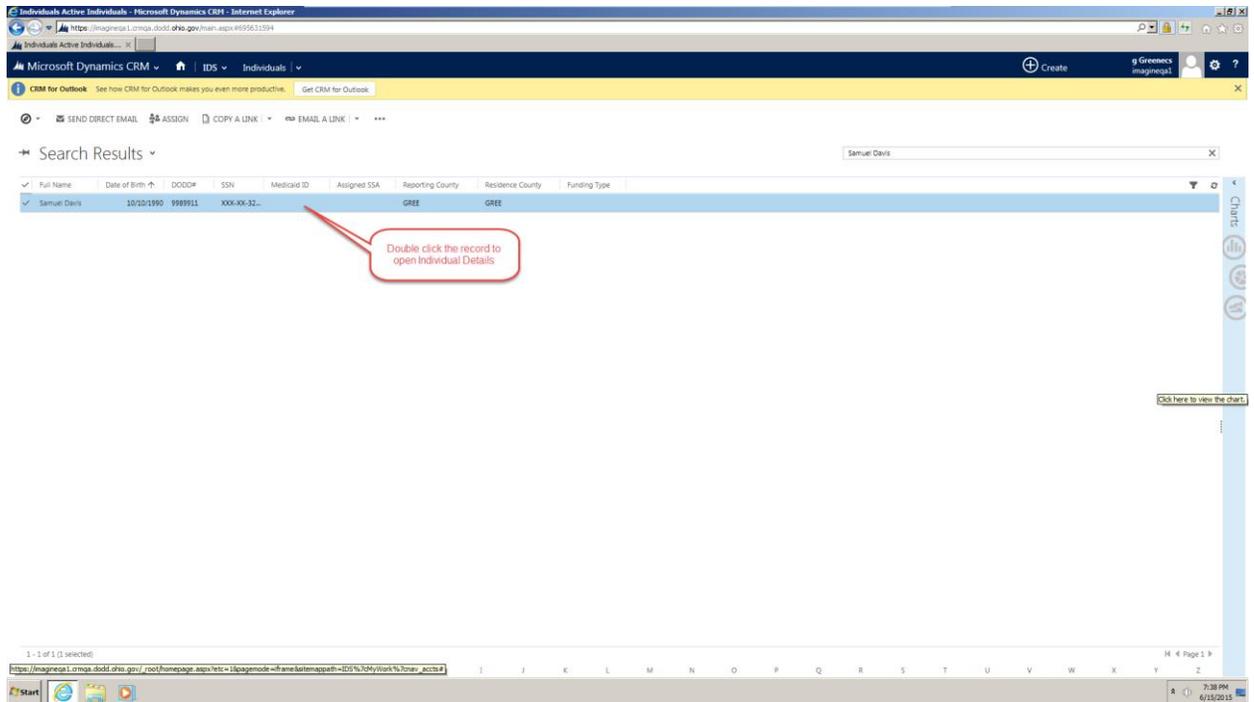


Department of
Developmental Disabilities

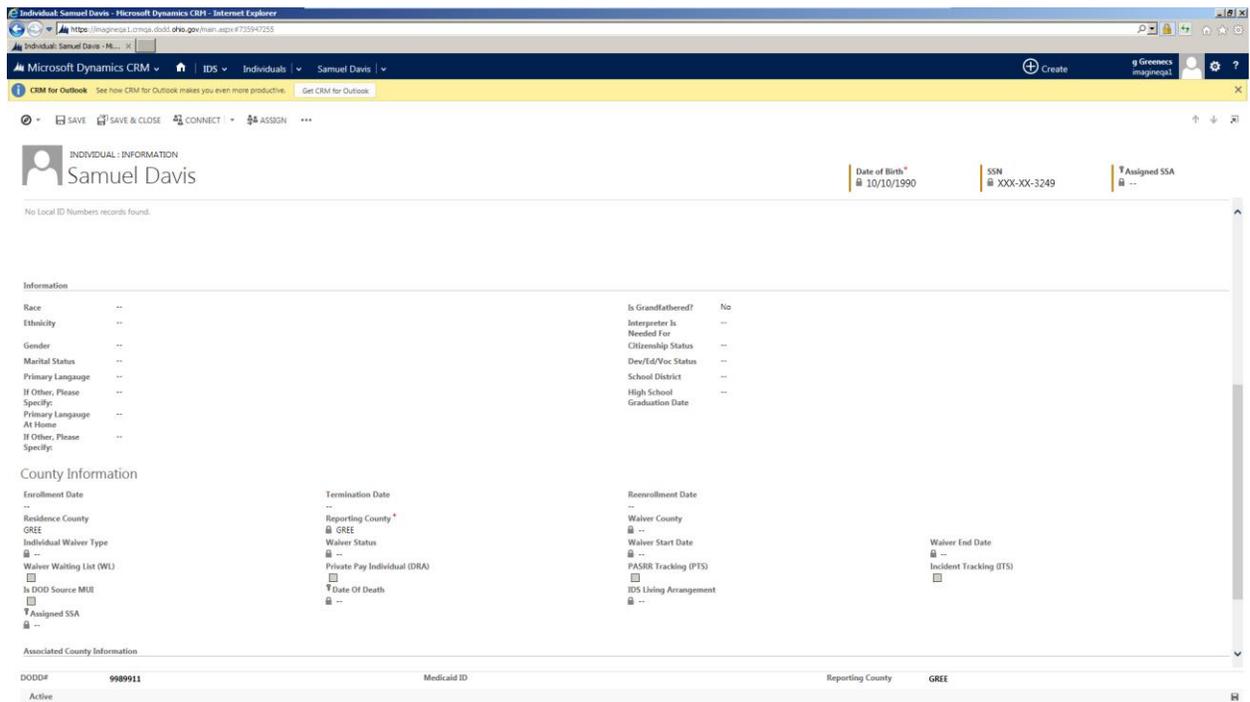
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Division of Information Technology Services





5. User will land on Individual front page.



July 1, 2015



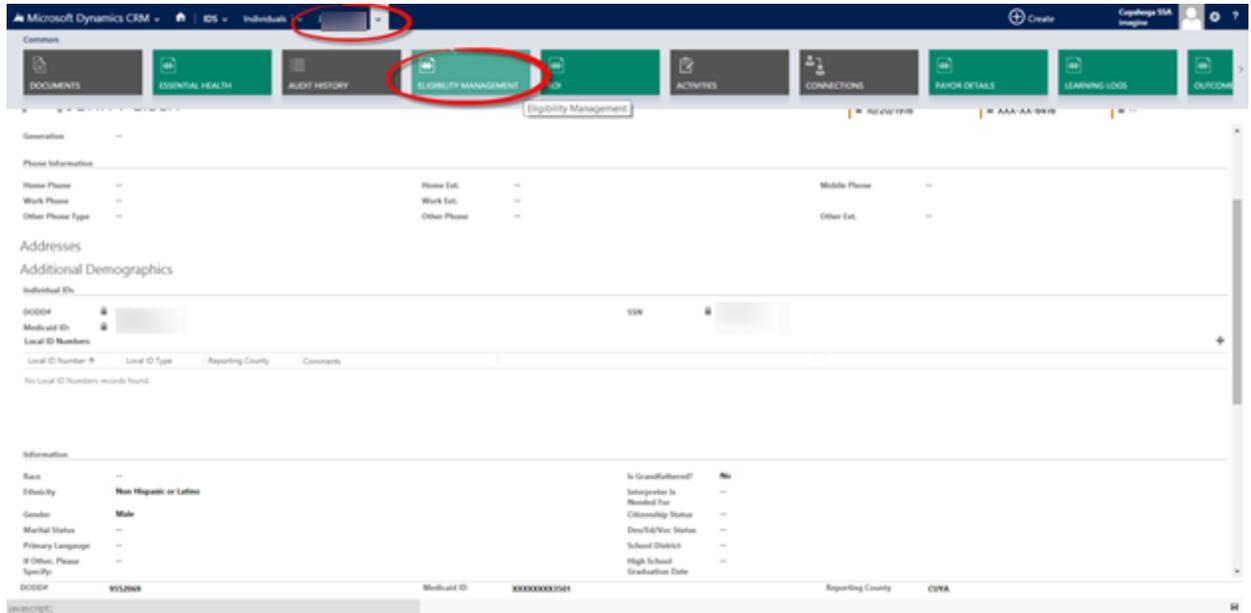
Department of
Developmental Disabilities

John R. Kasich, Governor
John L. Martin, Director

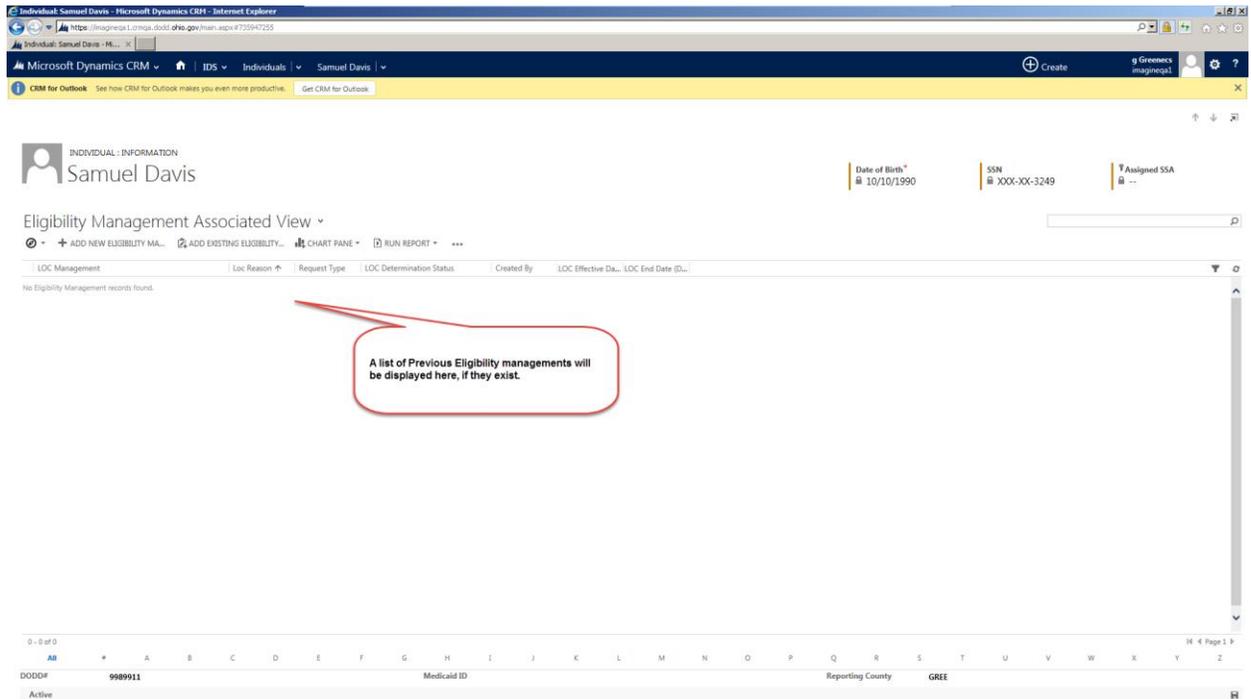
Division of Information Technology Services



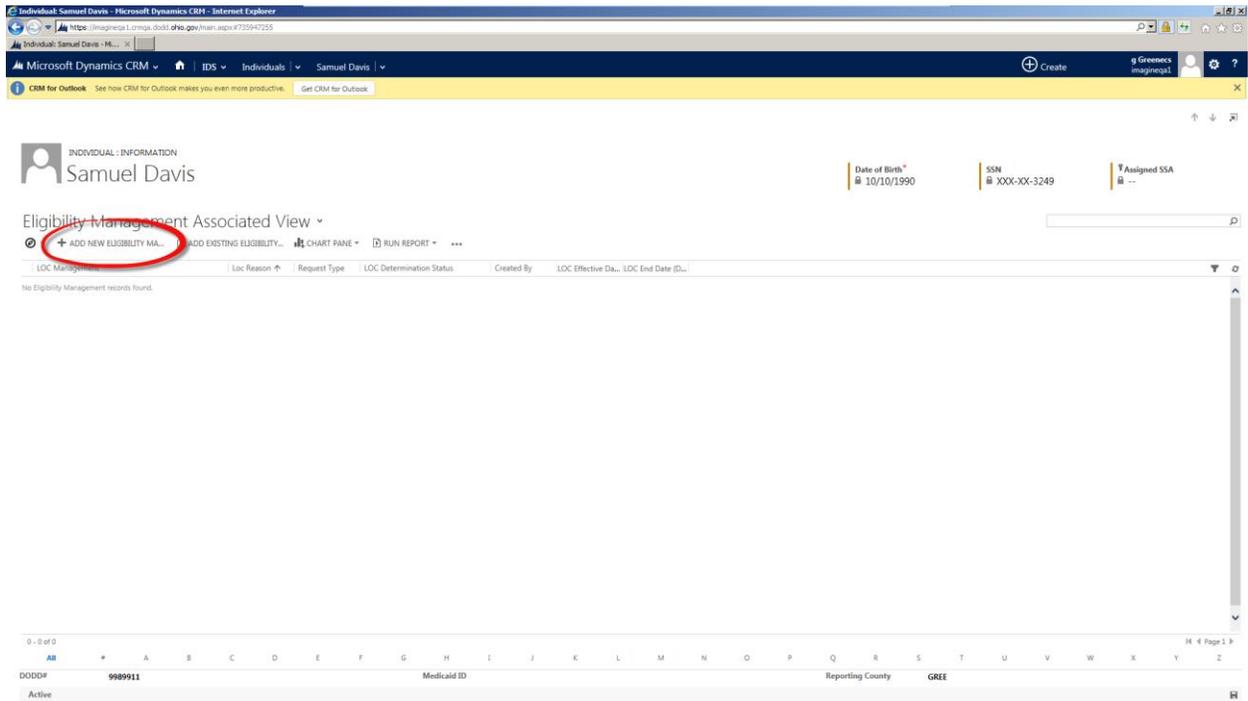
6. Start Eligibility Process - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



7. User will land on **Eligibility Management View Page**—you can see all the eligibilities done for that individual.



8. Add New Eligibility Management

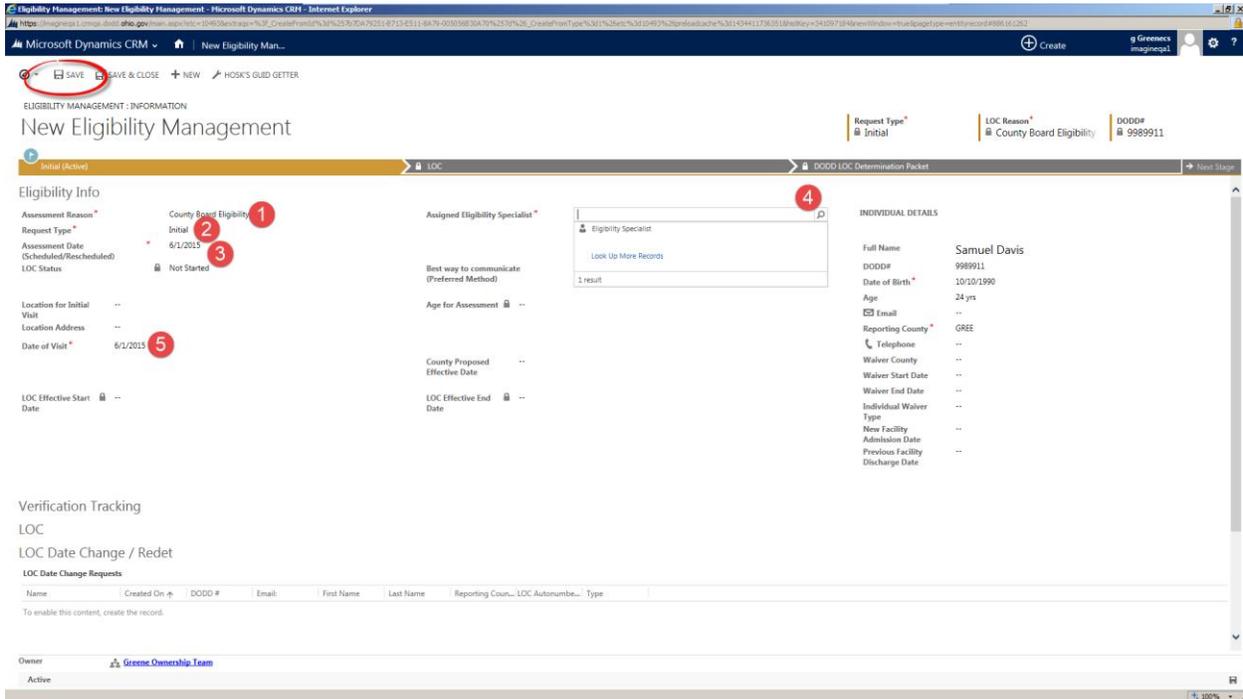


9. Enter required information on **Initial stage** to Save Eligibility management

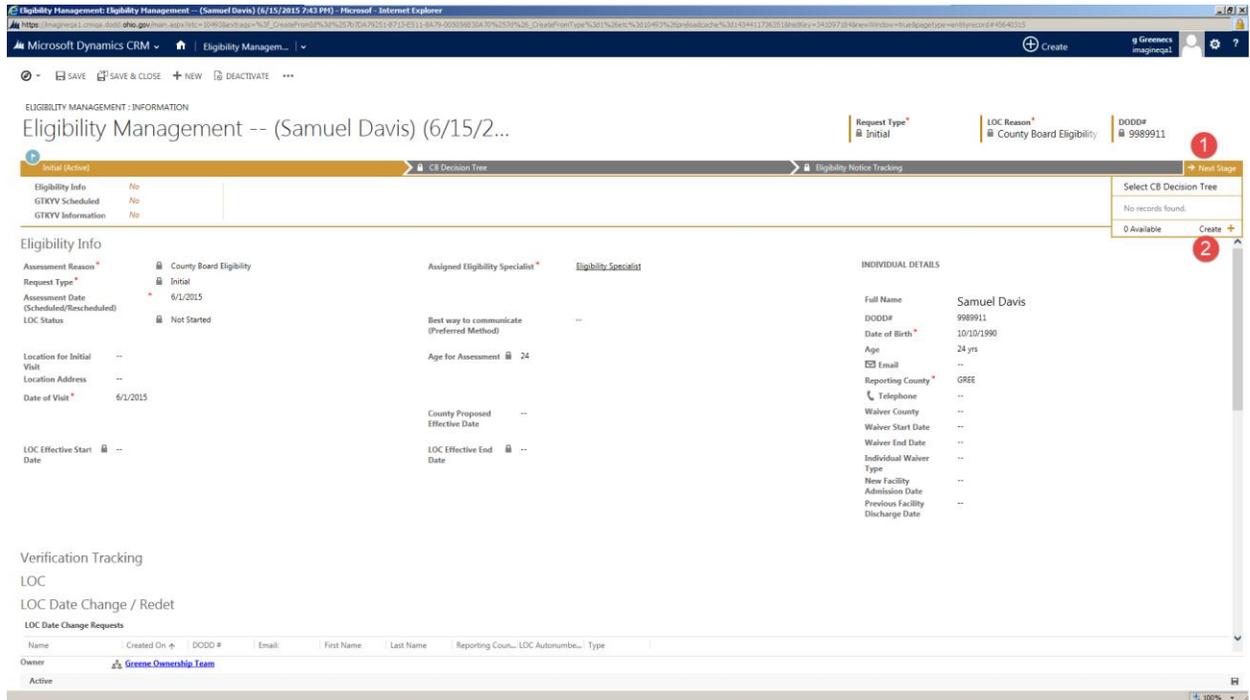
1. **Assessment Reason** = select County Board Eligibility
2. **Assessment Type** = Initial
3. **Assessment Date** = can be today's or past date – it's when you are got this information from individual
4. **Assign Eligibility Specialist** = click on the magnifying and select the eligibility specialist who will work with the individual
5. **Date of Visit** = can be today's or past date – it's when you met with individual to capture this information



Click on Save button.



10. Move to **Decision Tree** stage → by clicking on
 1. **“Next Stage”** and
 2. **Create+** on Next Stage



NOTE: The decision tree is available based on the individual’s present age (Birth to 2, 3 to 5, 6 to 9 and 10 and above).



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11. Enter the **Date of Determination** – can be today's or past date. This is a required field

Microsoft Dynamics CRM - Internet Explorer

Microsoft Dynamics CRM - New CB Decision Tr...

CB DECISION TREE: INFORMATION

New CB Decision Tree

Age for Assessment 24 | LOC # -- | Eligibility Status -- | Notification Date --

Initial | CB Decision Tree (Active) | Eligibility Notice Tracking

Date of Determination 6/15/2015

Determined By g Greenec

Assessment Reason County Board Eligibility

Individual Samuel Davis

can be today's or past date. This is a required field

For ages 10 and above- OPT-OUT

1. Does the individual have a diagnosed severe, chronic disability?

2. Is the diagnosed disability attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?

3. Was the diagnosed disability manifested before the age of 22?

4. Is the diagnosed disability likely to continue indefinitely?

5. The disability results in substantial functional limitations in at least three of the following areas:

- Self-care
- Expressive/receptive communication
- Learning
- Mobility
- Self-direction

Active

12. Answer all the questions on **Decision Tree**

13. **Save** or **Save and Close** at any time by clicking on the save button or the save and close button from top of this screen

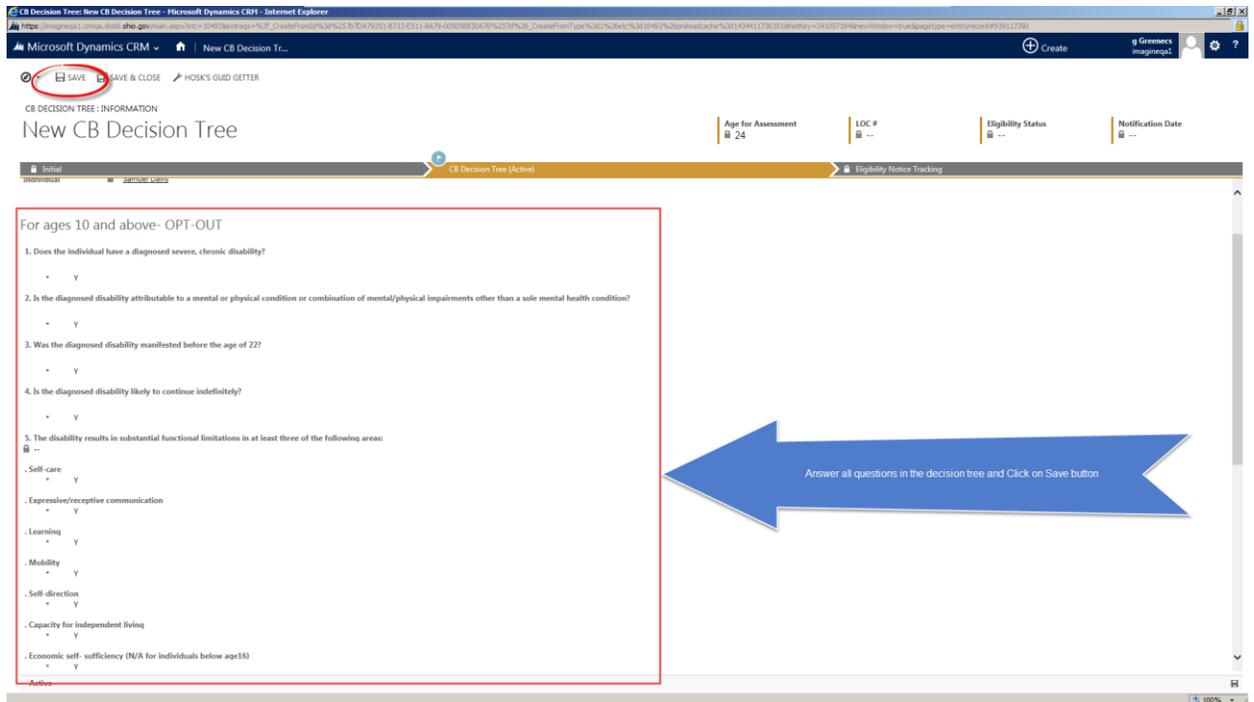


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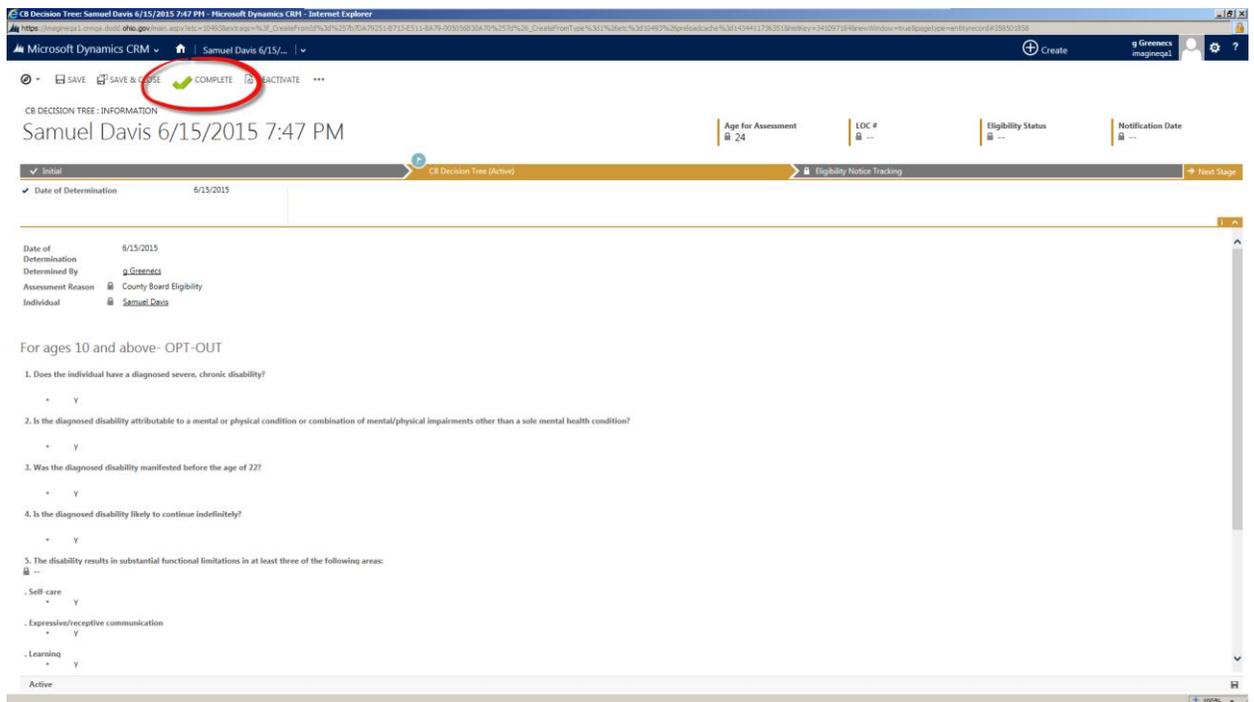
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14. Click on the **COMPLETE** button (appears only after Save) from top of this screen



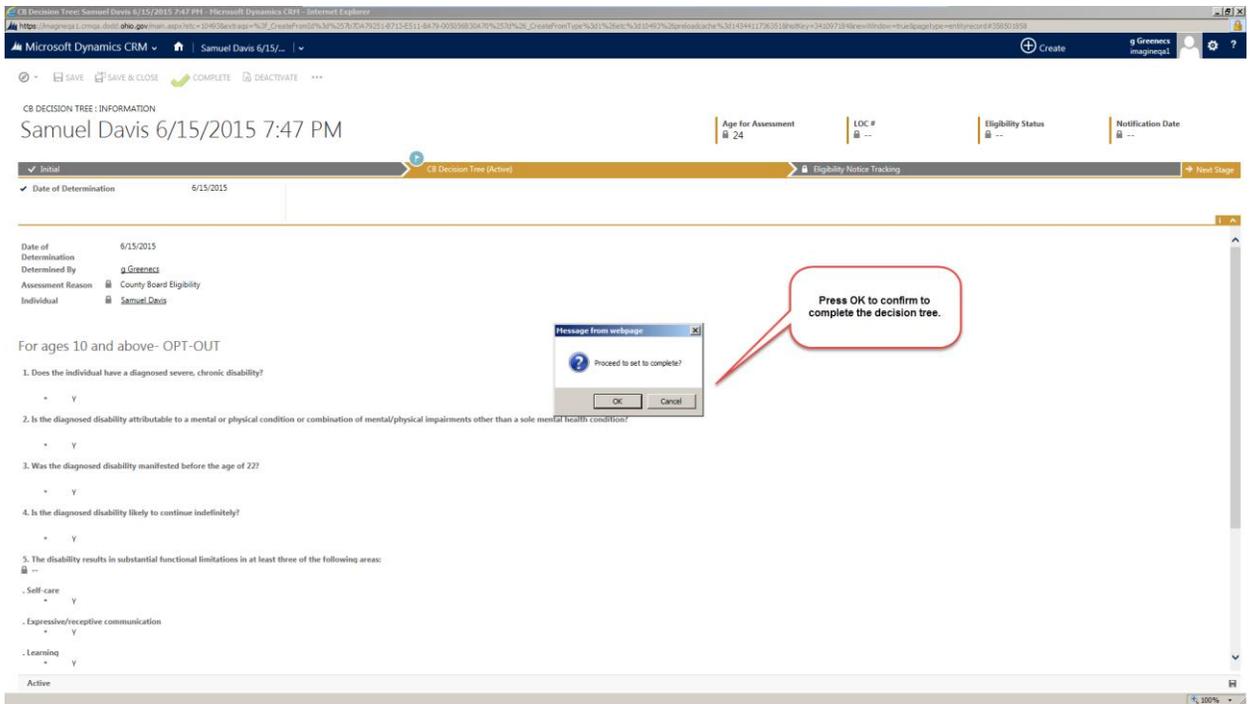
Department of
Developmental Disabilities

John R. Kasich, Governor
John L. Martin, Director

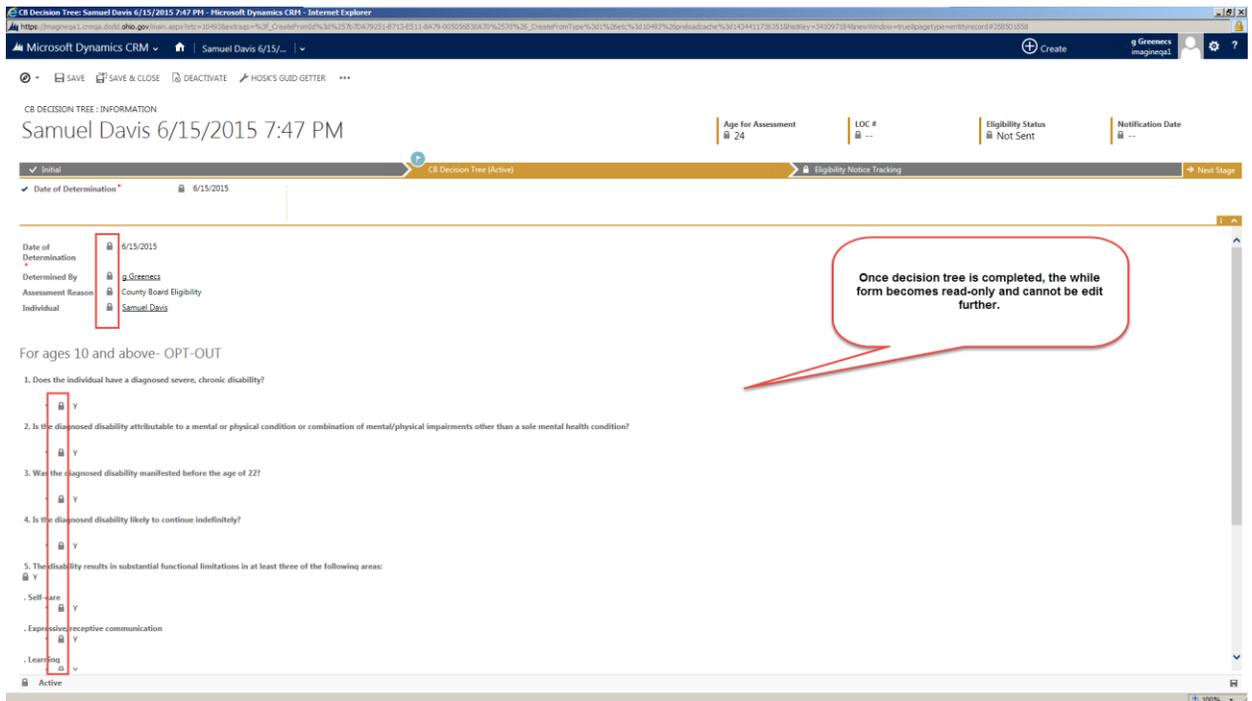
Division of Information Technology Services

July 1,





15. Once Decision Tree is Completed → **Decision Tree becomes read only**; user will see the lock symbol next to all the fields and cannot edit anything now.



July 1, 2015



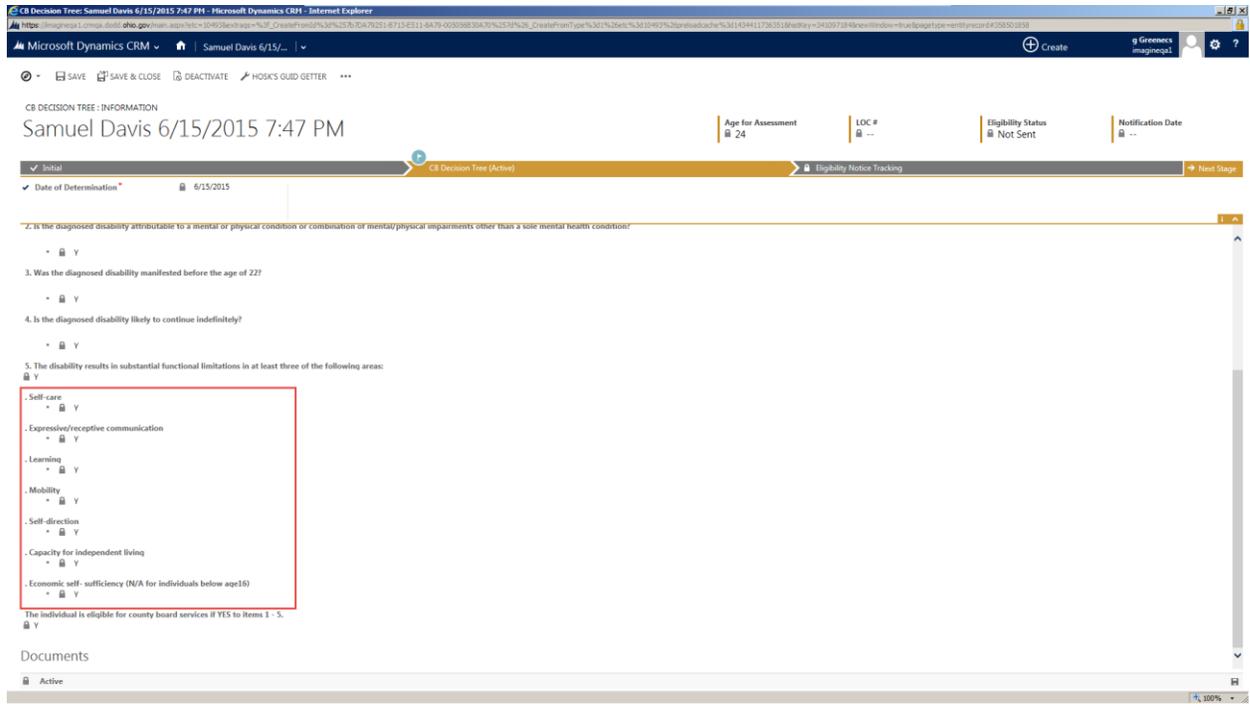
Department of
Developmental Disabilities

John R. Kasich, Governor
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Division of Information Technology Services

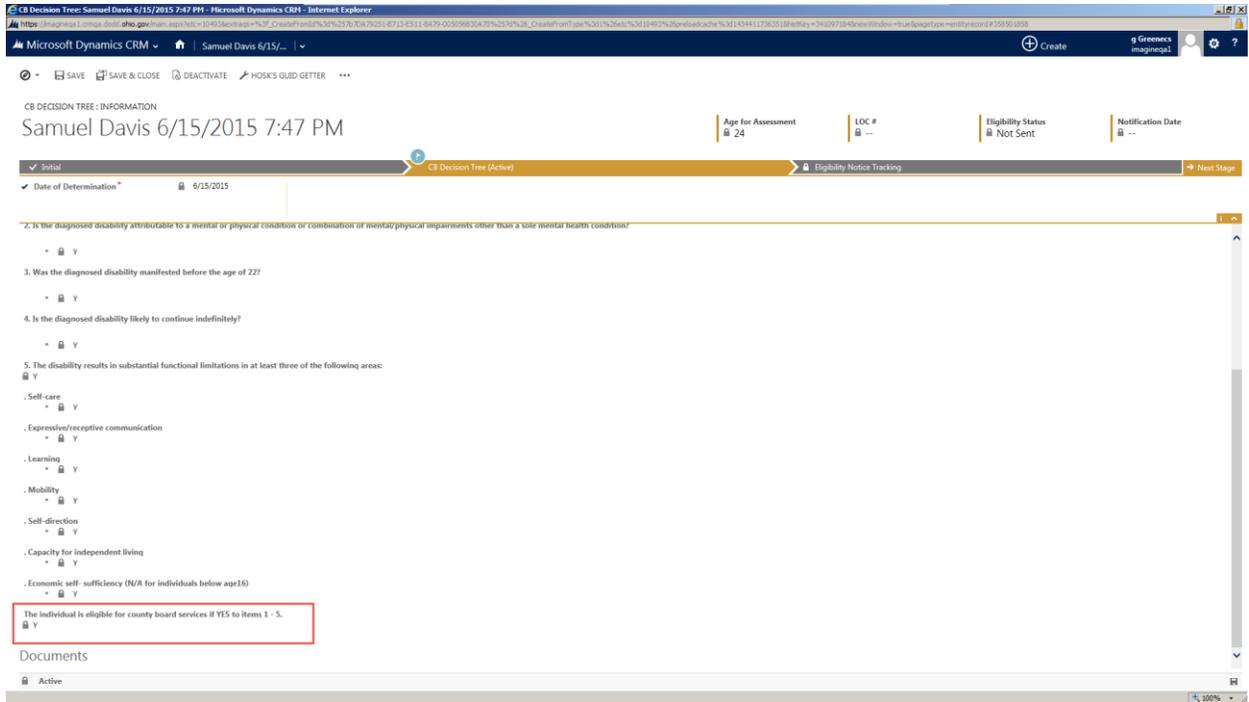


16. User can view Y/N answer for question 5 after Decision Tree is Completed



17. User will see the results (YES/NO) for county board eligibility once the Decision Tree is completed.





18. You can upload document to SharePoint at any time – before or after Completing the Decision Tree



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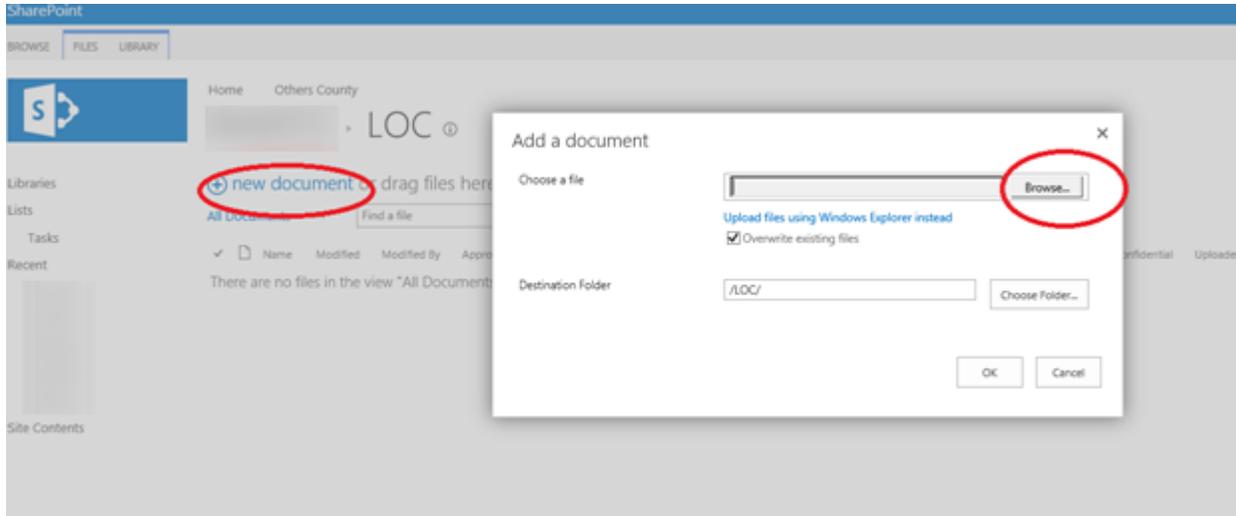
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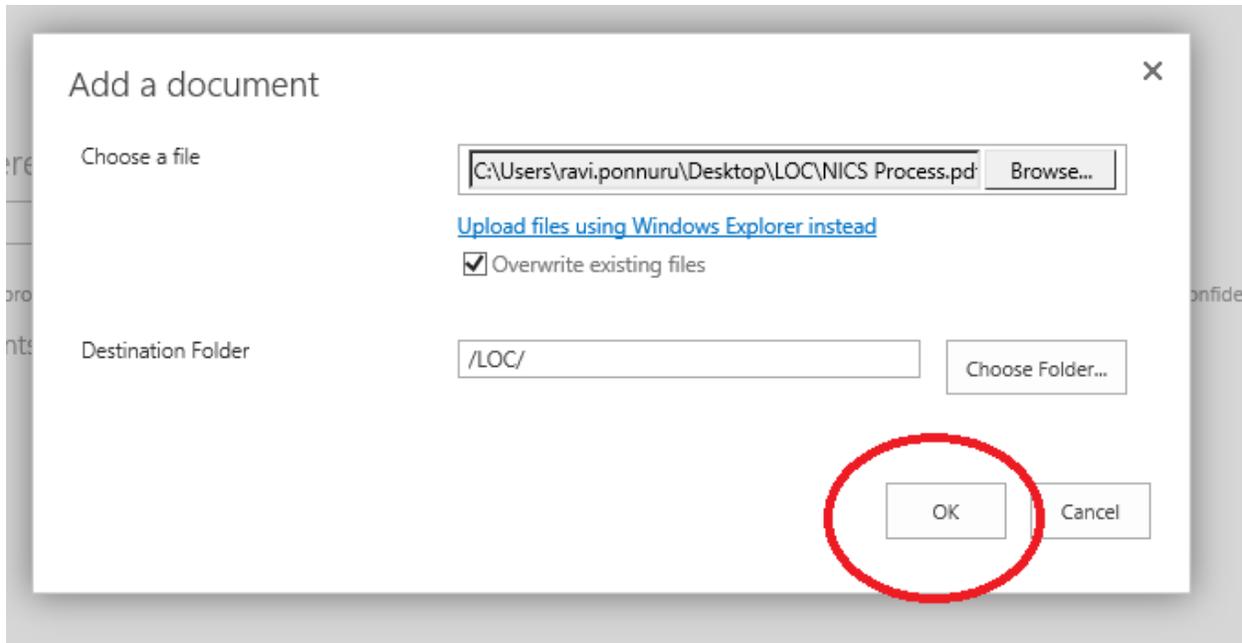


19. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document to SharePoint**
 1. Click on **+new document**
 2. Click on **chose file**



3. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on “Open” once done selecting
4. You will be back on previous screen → **Click on OK**





5. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
6. **Add Section →** Select “**LOC**” from the option set
7. **Add Category →** Select the reason for what you are uploading the document → in this case it should = **LOC –Waiver**
8. **Check Primary Verification** if this is a Primary Verification document
9. Click **OK** – User will be back on Initial Stage



9449172 - NICS Process.pdf

EDIT

Check In Cancel Paste Copy Delete Item

Commit Clipboard Actions

A summary of this resource

Section * [dropdown]

Category * Choose Section: [dropdown]

LOC Number [text box]

LOC Status [text box]

Primary Verification

LOC Status

Primary Verification

LOC Number



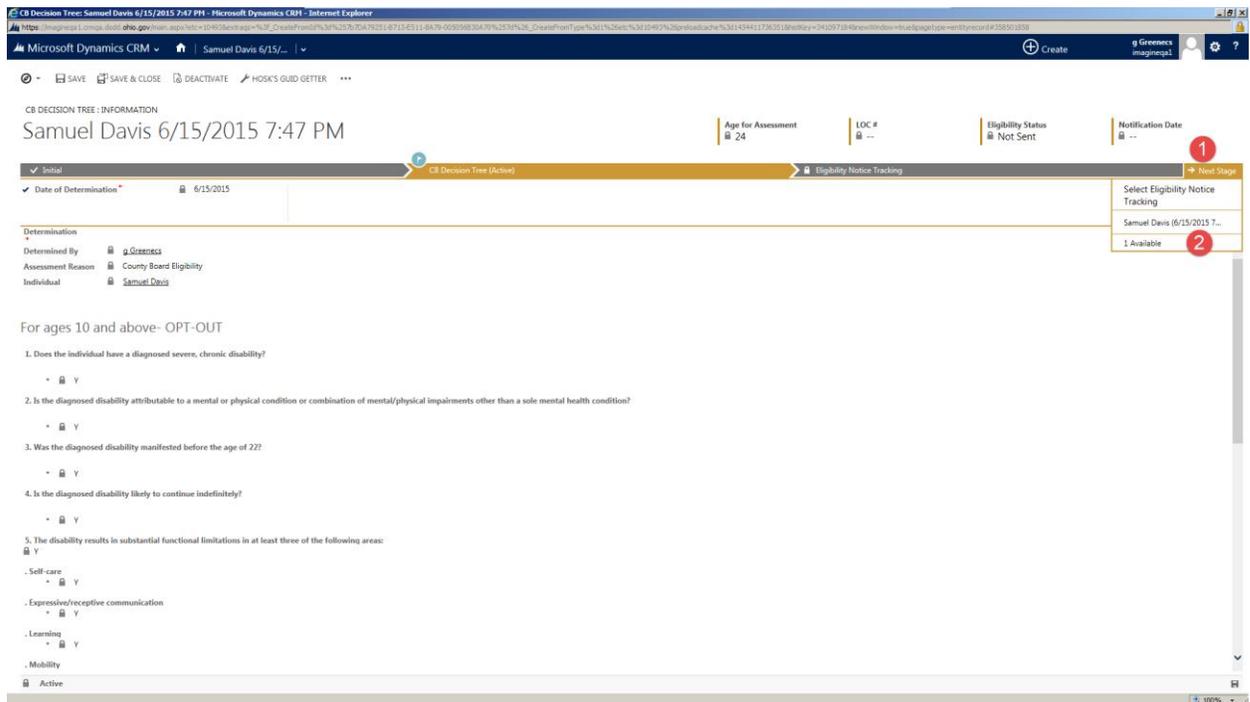
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20. Move to **Eligibility Notice Tracking** stage → by clicking
 1. on the “**Next Stage**” and
 2. **Select the Eligibility Notice** that is available.



21. **Type of Notification** will auto populate per the result of the tool (**Eligible/Yes** on LOC Tool or **Ineligible/No** on the LOC Tool)

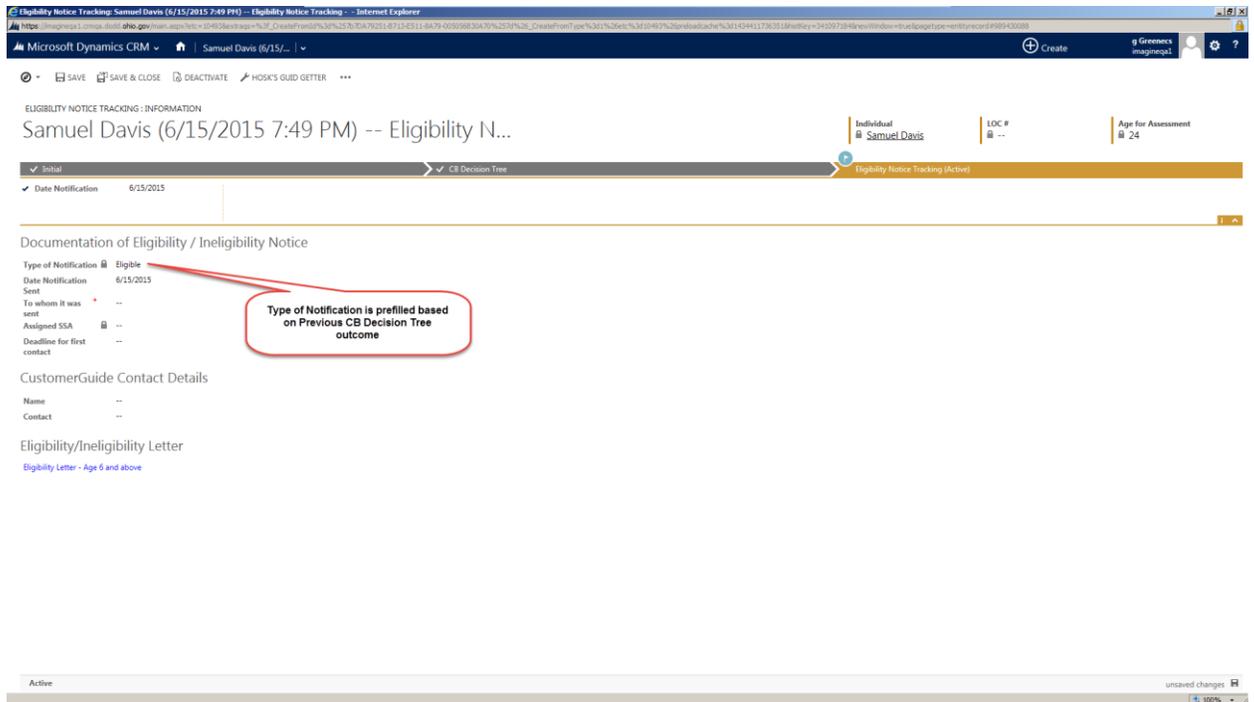


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22. Enter **Date notification Sent** – date when you will send this notification to the individual. Not a required field.

23. Fill in **To Whom it was Sent**

1. By selecting the Individual’s name or individual’s parent or guardian’s name from the option set.

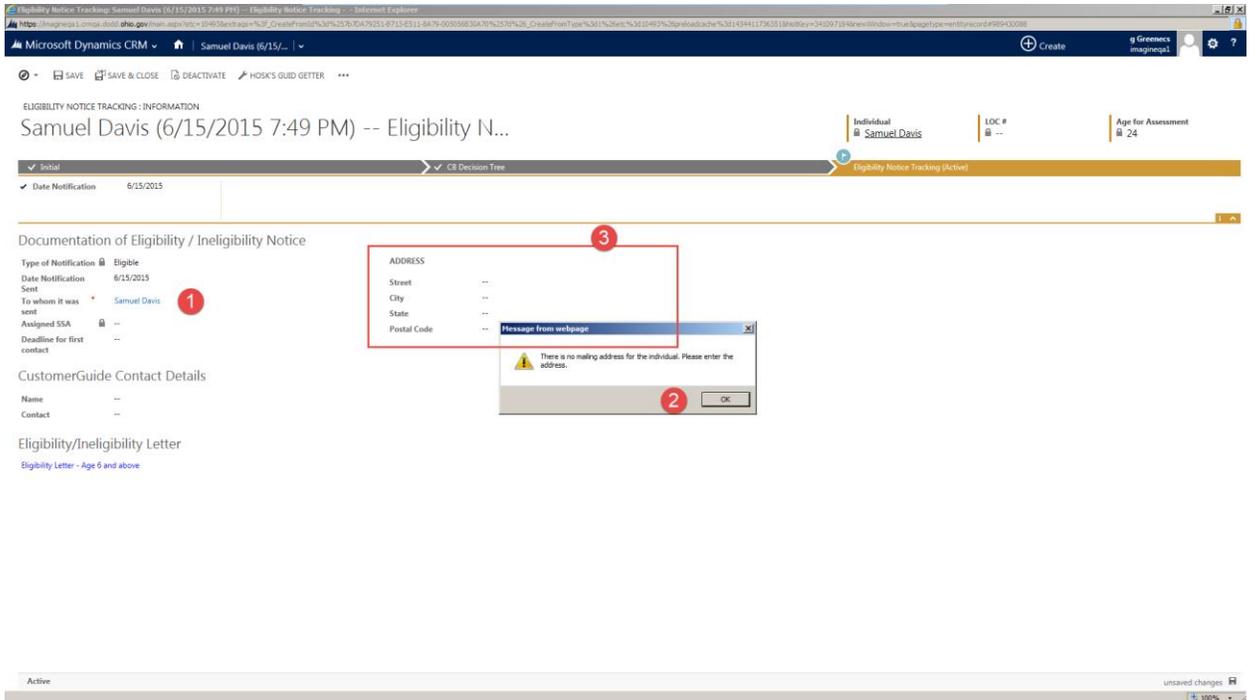


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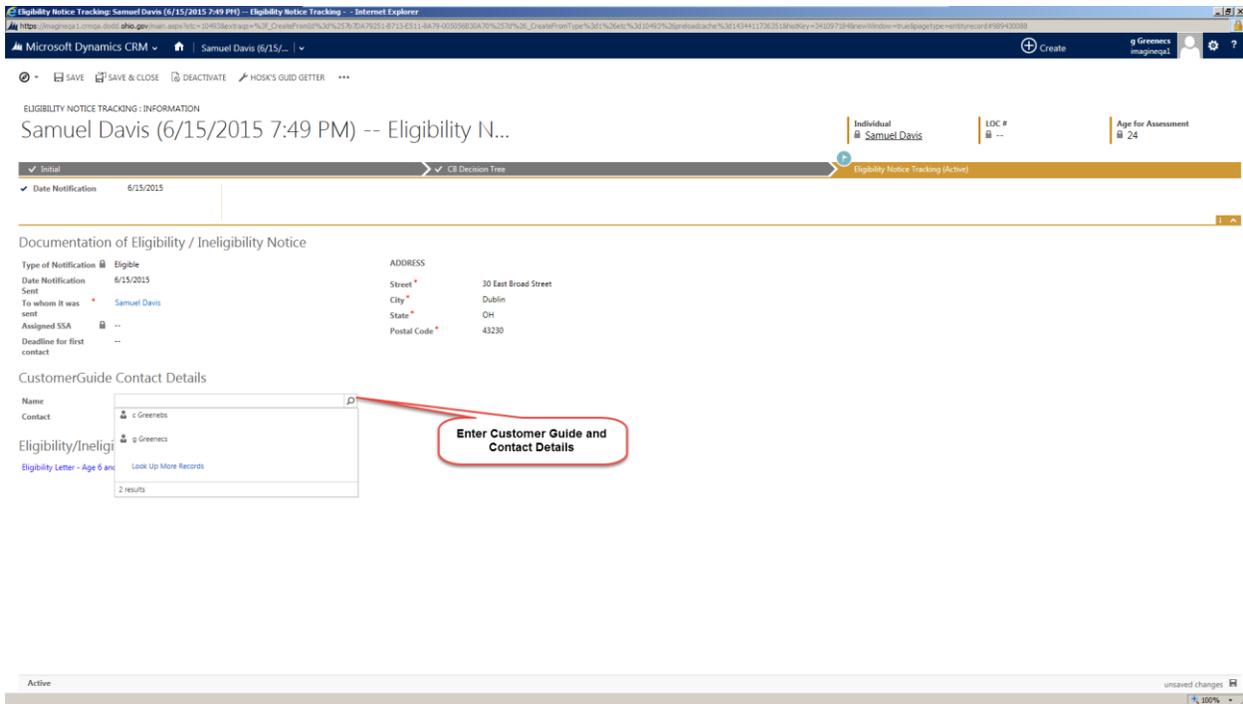


2. If the person to whom the mail has to be sent does not have mailing address, system will prompt you to enter mailing address. Press OK to confirm.

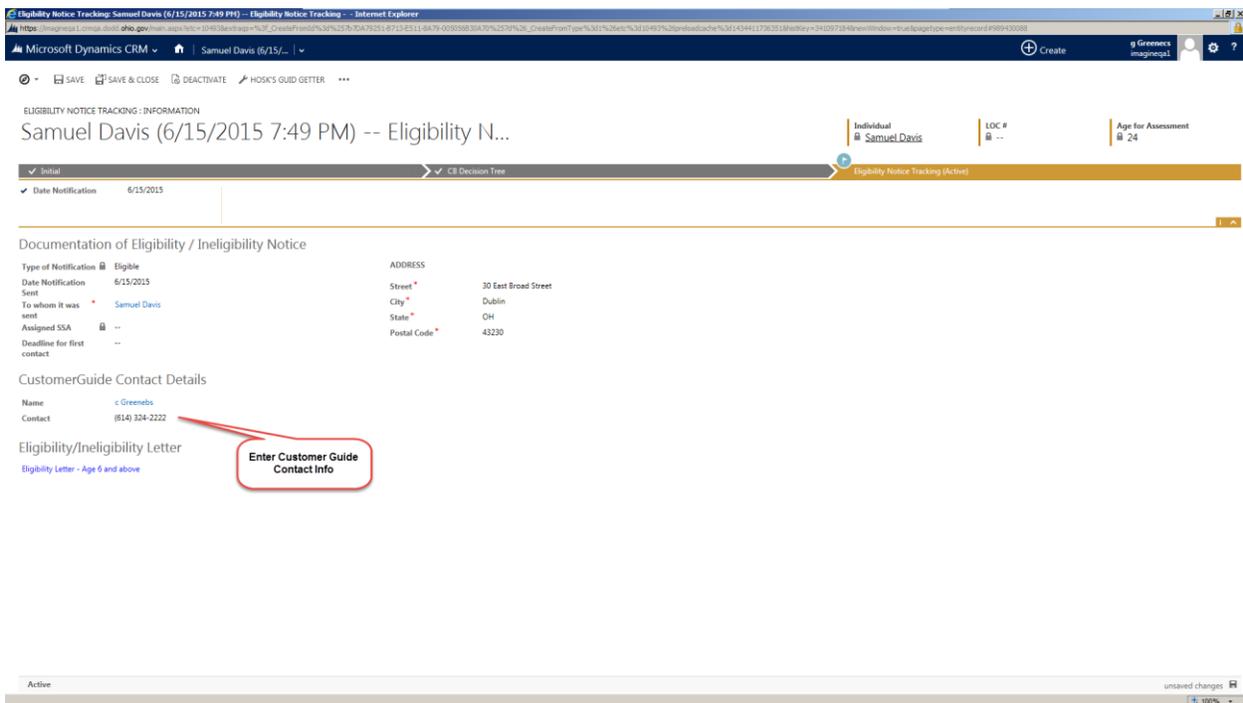
3. **Enter the mailing address** for the individual. Address will be prefilled if individual have a mailing address on his profile

24. **Select a Customer Guide or Eligibility Specialist** by clicking on the magnifying glass - this will show you list of all customer guide and eligibility specialist in your county.



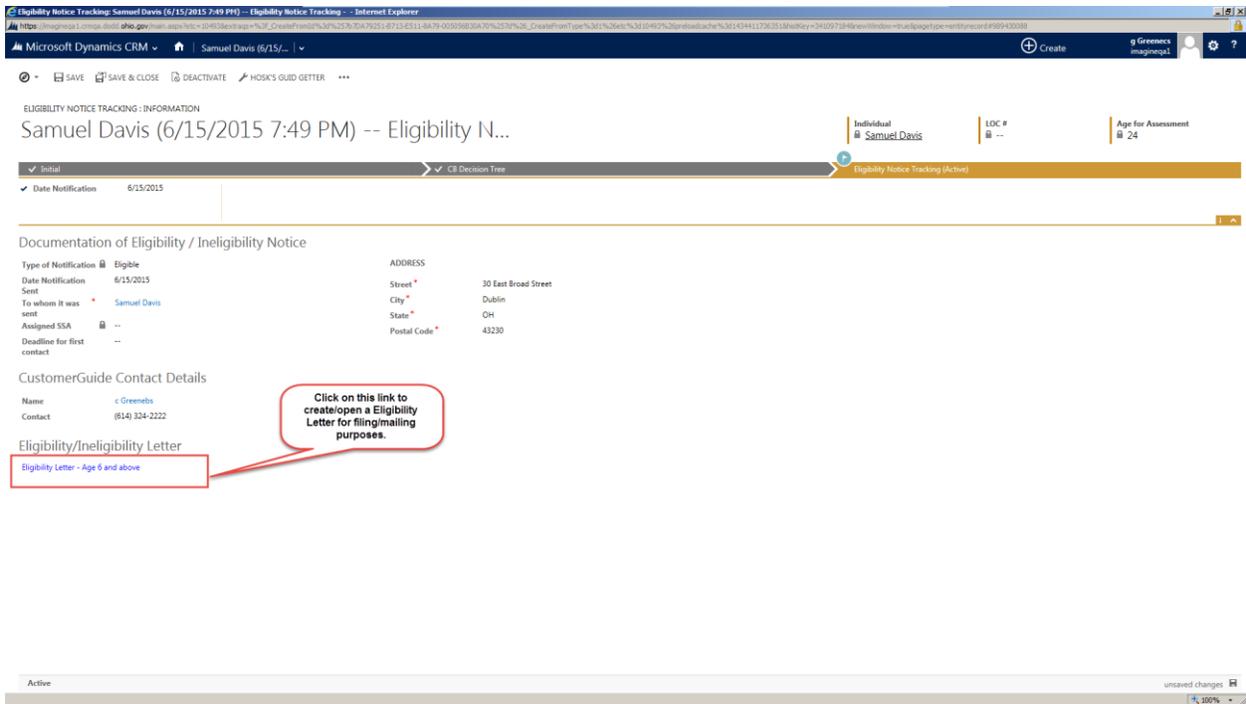


7. Enter Customer Guide’s contact information

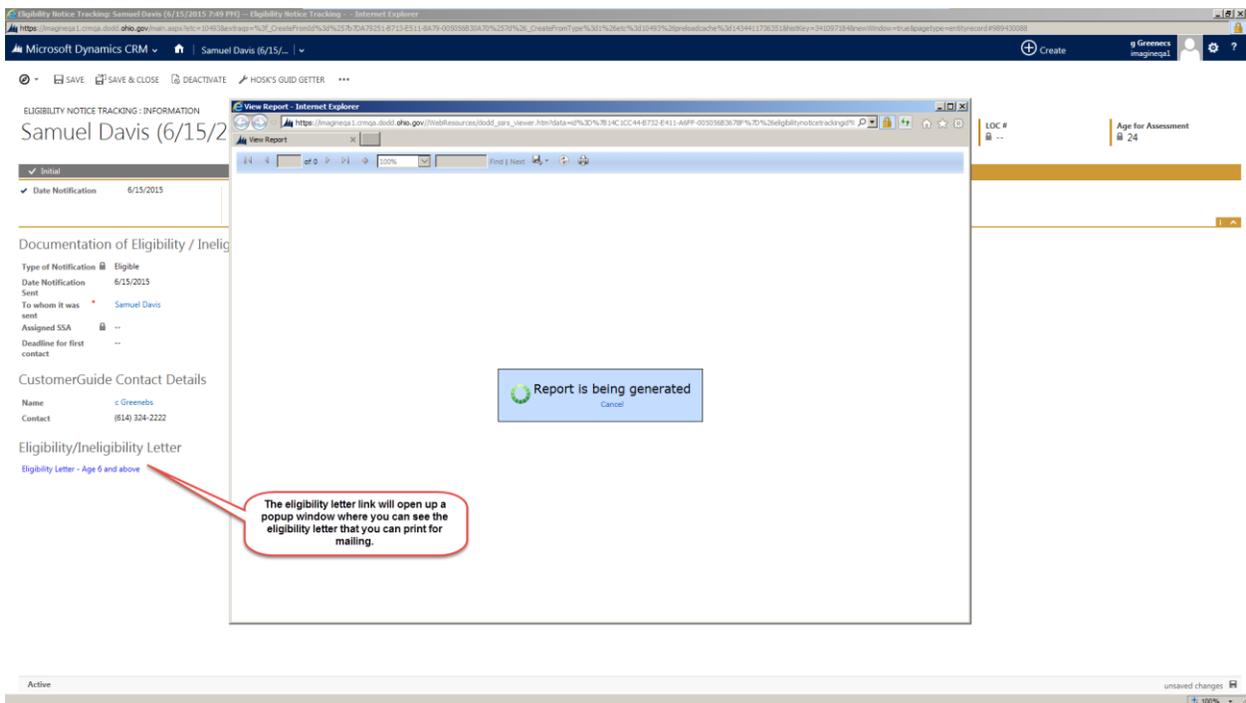


8. Open the **Eligible/Ineligible Notice** by clicking on the link under the Eligibility/Ineligibility Letter Tab





9. Eligible/Ineligible Notice will open in a new tab

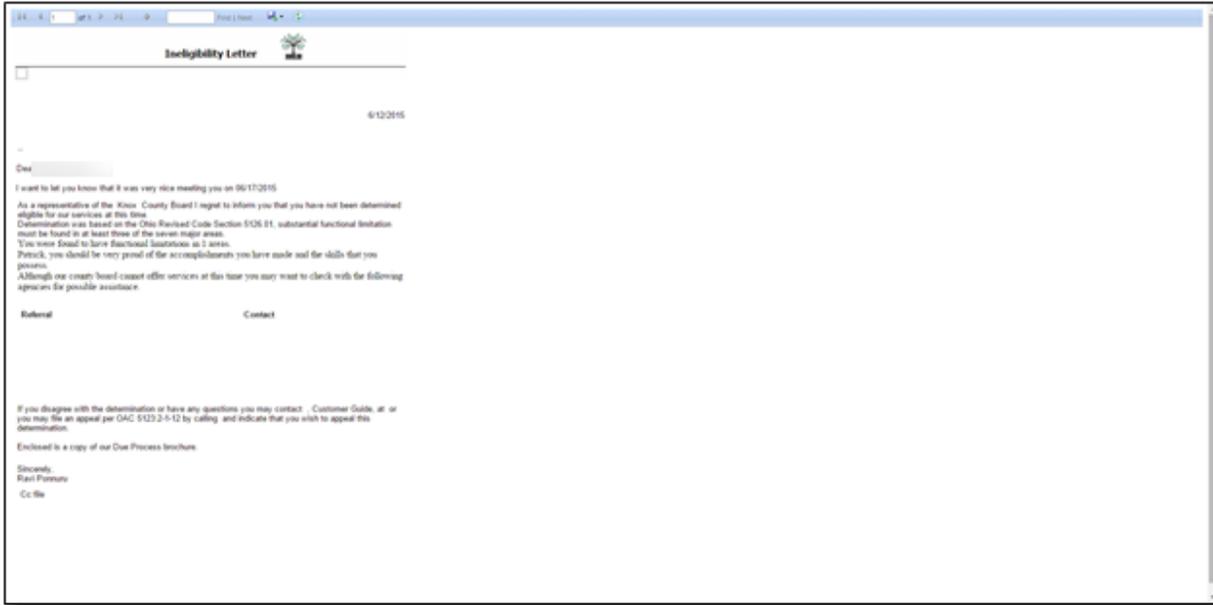


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Developmental Disabilities

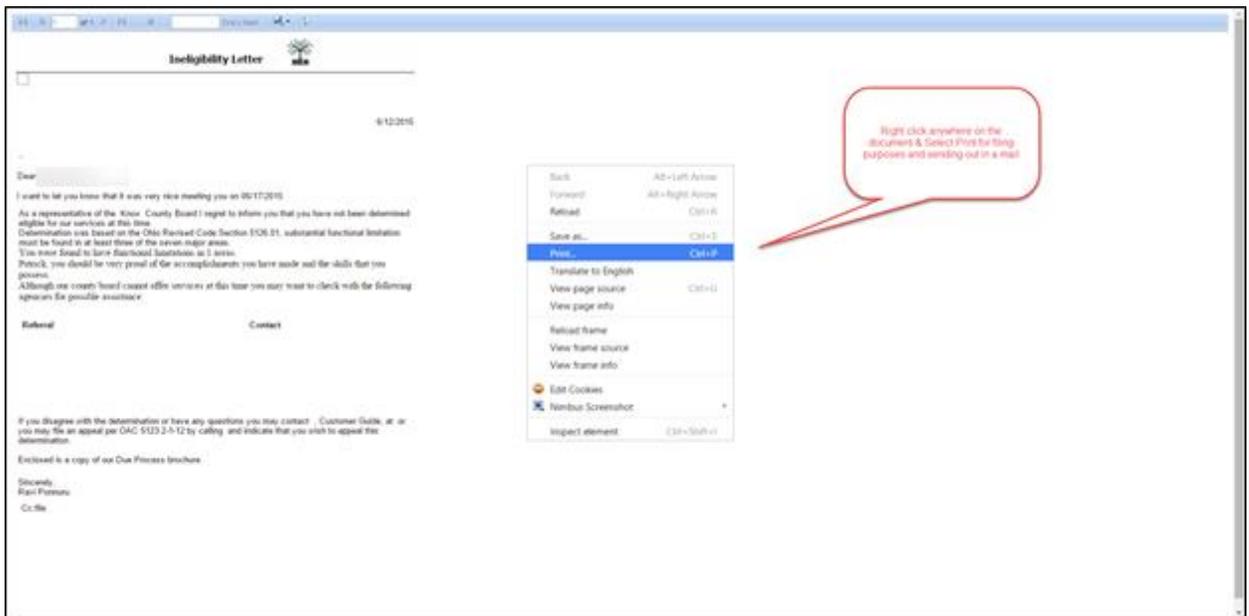
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10. Right click on your mouse and select print to **Print the Notice**



You just completed the County Board eligibility for an individual

July 1, 2015

LOC for County Board Eligibility (Applies to only 10 & above individuals)

1. To start a LOC for county board eligibility for an Individual, **Search for individual** by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box.
3. **Individual record will show up** if individual exist in your county
4. Double click on individual record to open individual's record
5. User will land on **Individual front page**

The screenshot shows the Microsoft Dynamics CRM interface for an individual named 'headphone mike'. The page displays various fields for personal and contact information.

INDIVIDUAL INFORMATION		Date of Birth	SSN	Assigned SSA
headphone mike		1/6/2015	XXX-XX-0105	--
Nick Name	--	Email	--	
First Name	headphone	Date Of Birth	1/6/2015	
Middle Name	--	Age	0 yrs 5 mos	
Last Name	mike	Full Name	headphone mike	
Generation	--			
Phone Information				
Home Phone	--	Home Ext.	--	Mobile Phone
Work Phone	--	Work Ext.	--	
Other Phone Type	--	Other Phone	--	Other Ext.
Essential Health Indicators				
Case Notes				
Addresses				
More About Me				
DOB#	9989579	Medicaid ID	XXXXXXXX4564	Reporting County
				ALLE
Active				unsaved changes

6. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name

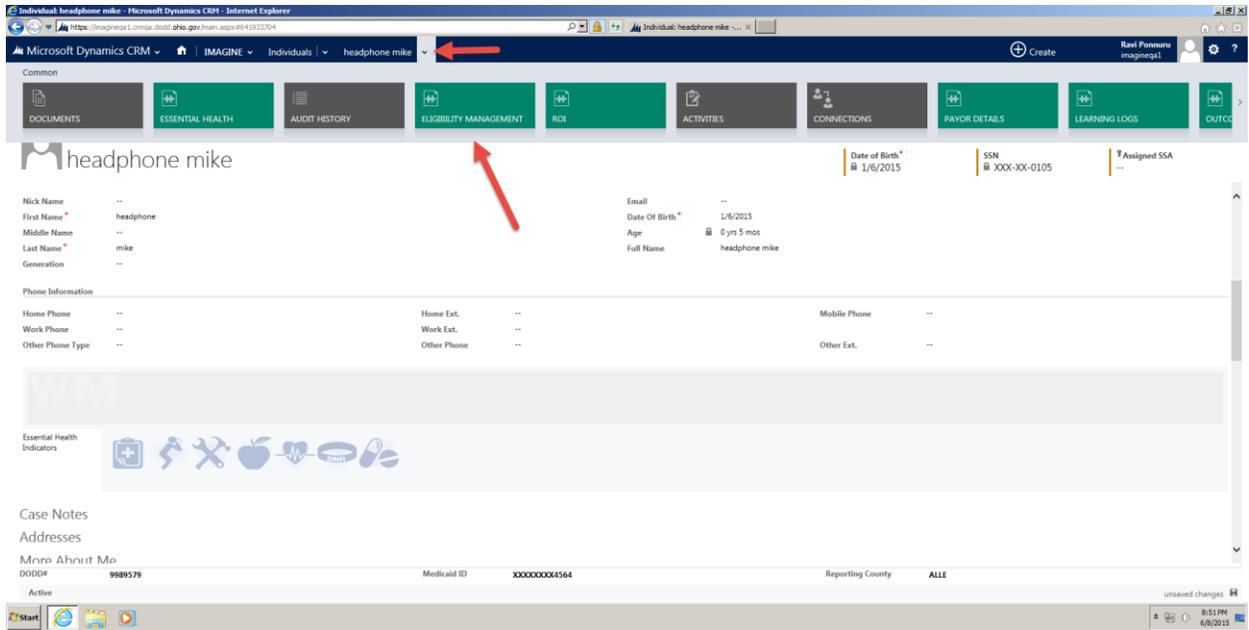


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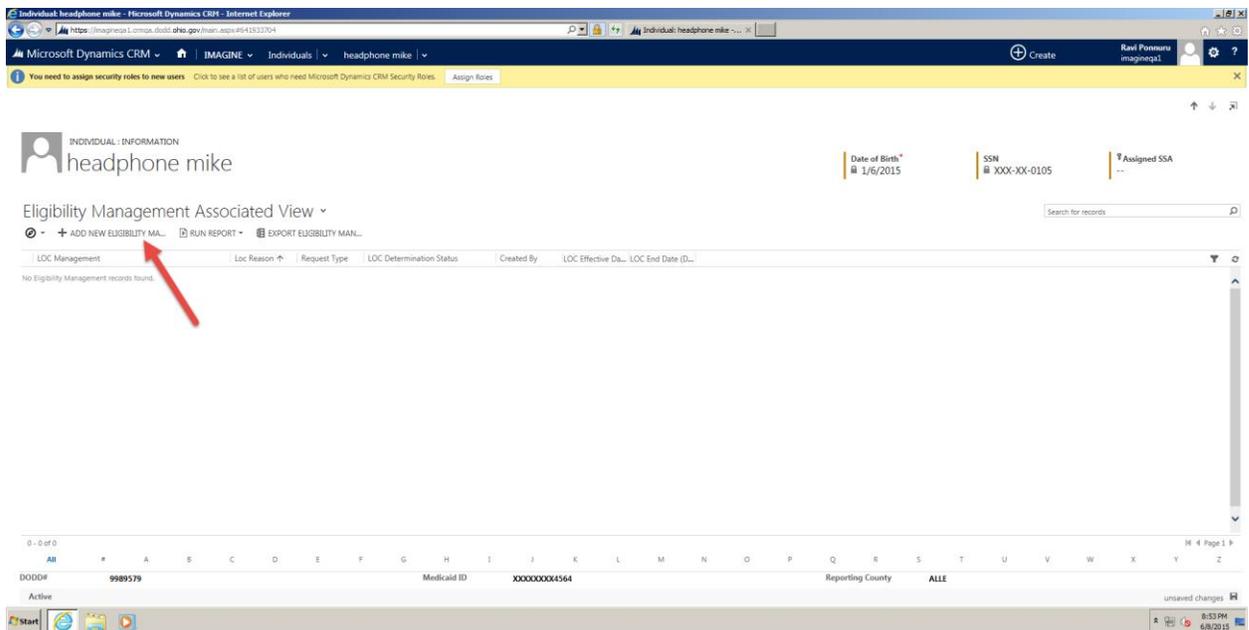
Division of Information Technology Services





7. User will land on **Eligibility Management View Page**—you can see all the eligibilities done for that individual

8. **Add New Eligibility Management**



9. Enter required information on **Initial stage** to Save Eligibility management



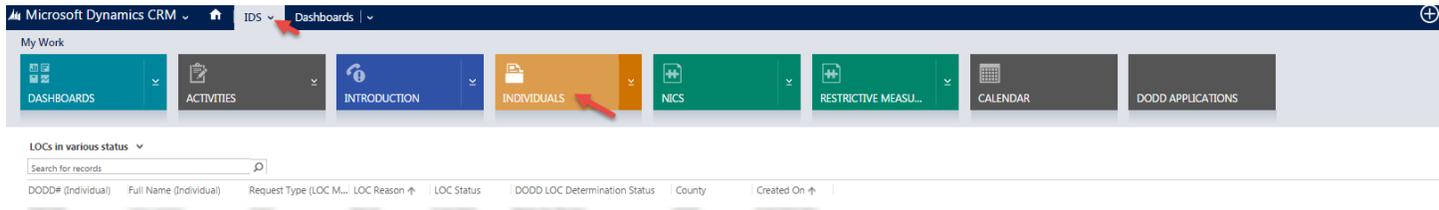
1. **Assessment Reason** = select County Board Eligibility
2. **Assessment Type** = Initial
3. **Assessment Date** = can be today's or past date – it's when you got this information from individual
4. **Date of Visit** = can be today's or past date – it's when you met with individual to capture this information
5. **Assign Eligibility Specialist** = click on the magnifying glass and select the eligibility specialist who will work with the individual
6. Click on Save button

10. Cannot Move to **LOC** stage (has to be an evaluator)

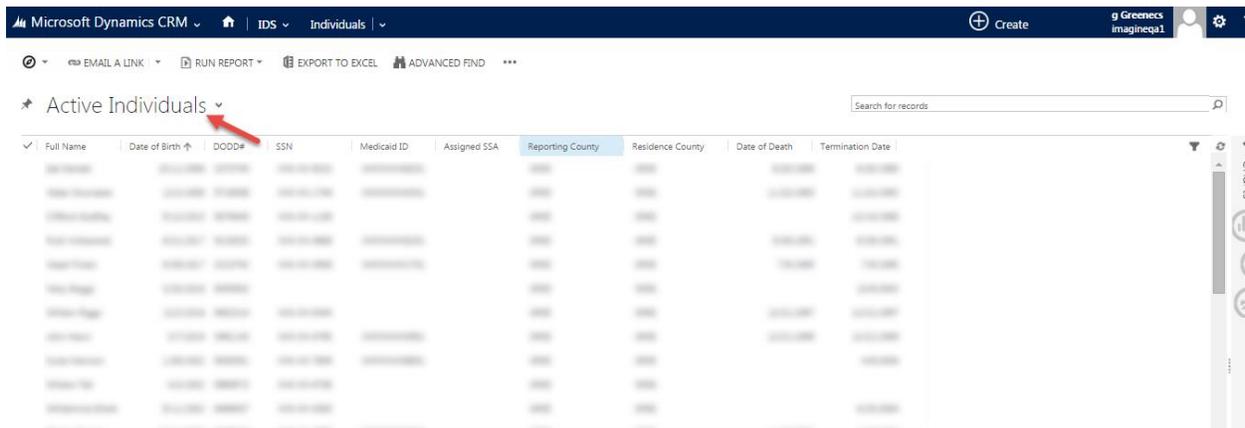


LOC for Waiver Eligibility

1. To access list of individuals in your county → Select **Individual Tile** from dropdown arrow next to IDS/iMAGINE



2. You will see list of **Active Individuals in your county**



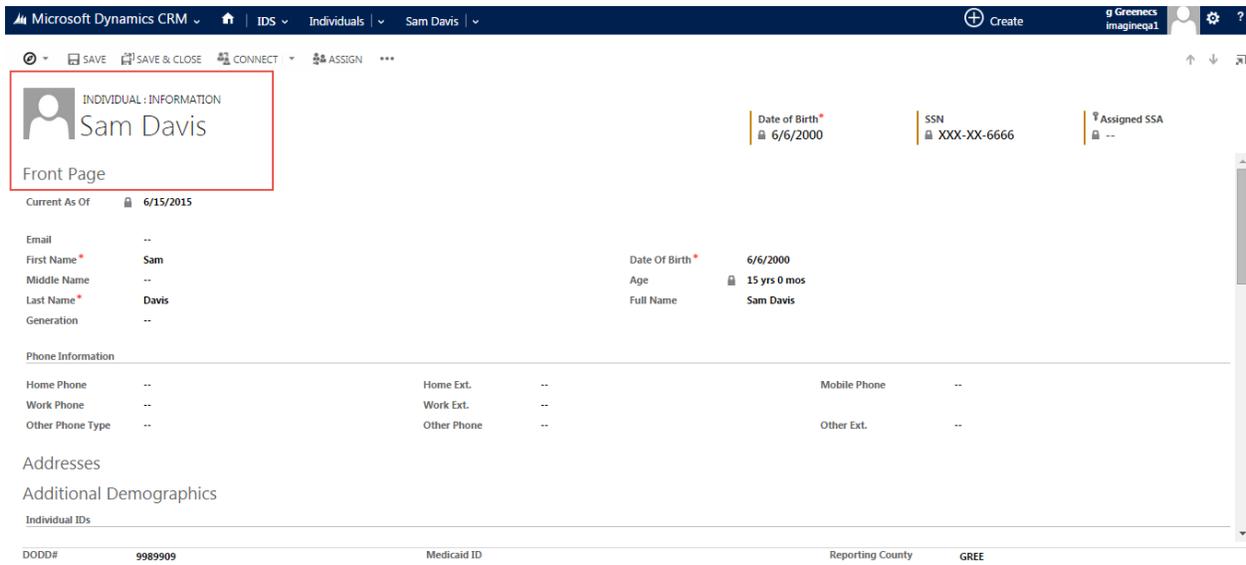
3. **Search for individual** by typing name in search box
4. Hit **Enter** or click on the magnifying glass next to search box
5. **Individual record will show up** if individual exist in your county



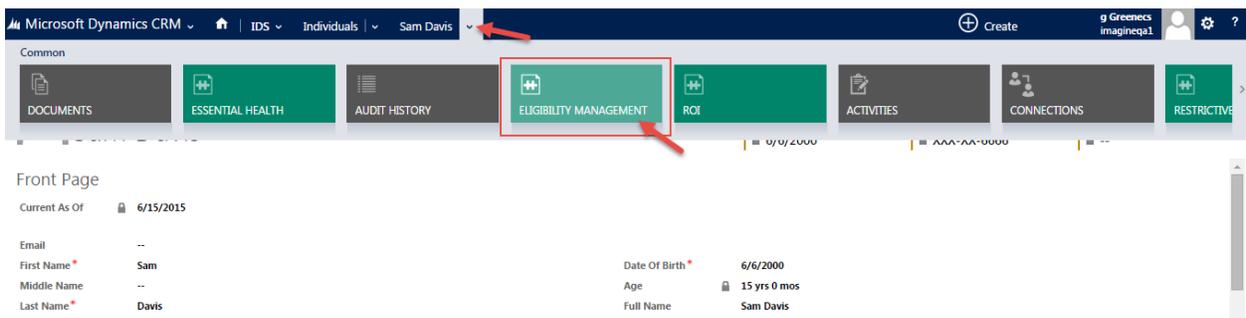


6. Double click on individual record to open individual’s record

7. User will land on **Individual front page**



8. Start Eligibility Process - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual’s name

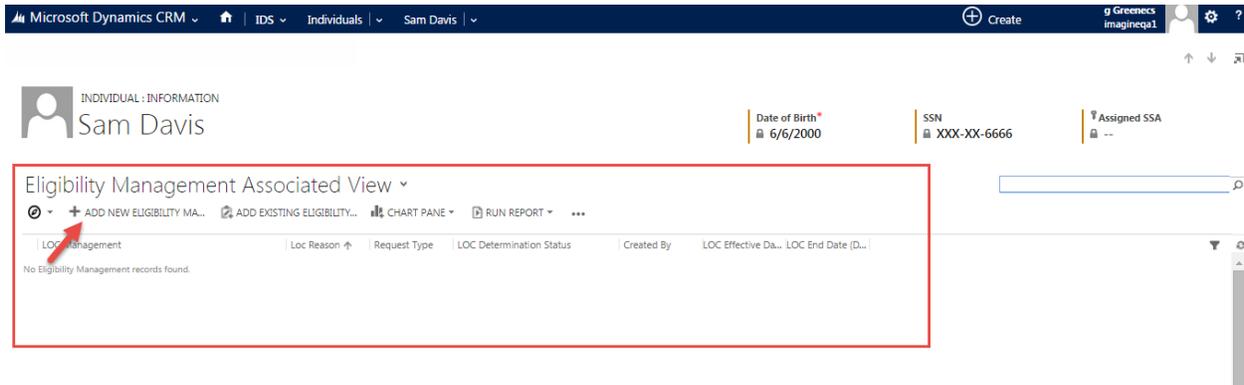


July 1, 2015



9. User will land on **Eligibility Management View Page**—you can see all the eligibilities done for that individual

10. Add New Eligibility Management



11. Enter required information on **Initial stage** to Save Eligibility management

1. **Assessment Reason** = select Waiver
2. **Assessment Type** = Initial
3. **Assign Evaluator** = click on the magnifying and select the evaluator who will complete the LOC for this individual. You can assign yourself if you will do it
4. **Assessment Date** = can be today's or past date – it's the date when you got this information from individual
5. **Waiver Type** – select the type of waiver you are applying for



Microsoft Dynamics CRM | Eligibility Managem... | Create | g Greenecs imagineq1

SAVE SAVE & CLOSE + NEW DEACTIVATE

ELIGIBILITY MANAGEMENT : INFORMATION

Eligibility Management -- (Sam Davis) ...

Request Type: Initial | LOC Reason: Waiver | DODD#: 9989909

Initial (Active) | LOC | DODD LOC Determination Packet | Next Stage

Eligibility Info	No	Primary Verification	No
GTKYV Scheduled	No		
GTKYV Information	No		

Eligibility Info

Assessment Reason: Waiver 1
 Request Type: Initial 2
 Assigned Evaluator: g Greenecs 3
 Assessment Date (Scheduled/Rescheduled): 6/10/2015 4
 LOC Status: Not Started

Assigned Eligibility Specialist: --
 Waiver Type: IO 5
 Best way to communicate(Preferred Method): --
 Age for Assessment: 15
 Proposed Effective Date: --
 LOC Effective Start Date: --
 LOC Effective End Date: --

INDIVIDUAL DETAILS

Full Name: Sam Davis
 DODD#: 9989909
 Date of Birth: 6/6/2000
 Age: 15 yrs 0 mos
 Email: --
 Reporting County: GREE
 Telephone: --
 Waiver County: --
 Waiver Start Date: --
 Waiver End Date: --
 Individual Waiver Type: --



Department of Developmental Disabilities

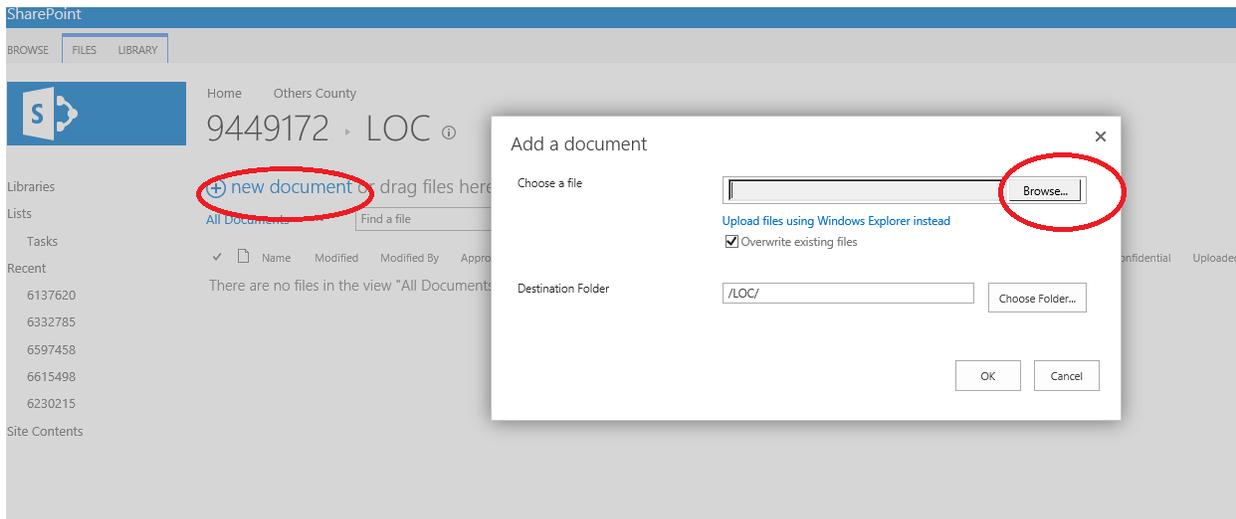
John R. Kasich, Governor
 John L. Martin, Director

Division of Information Technology Services

July 1, 2015

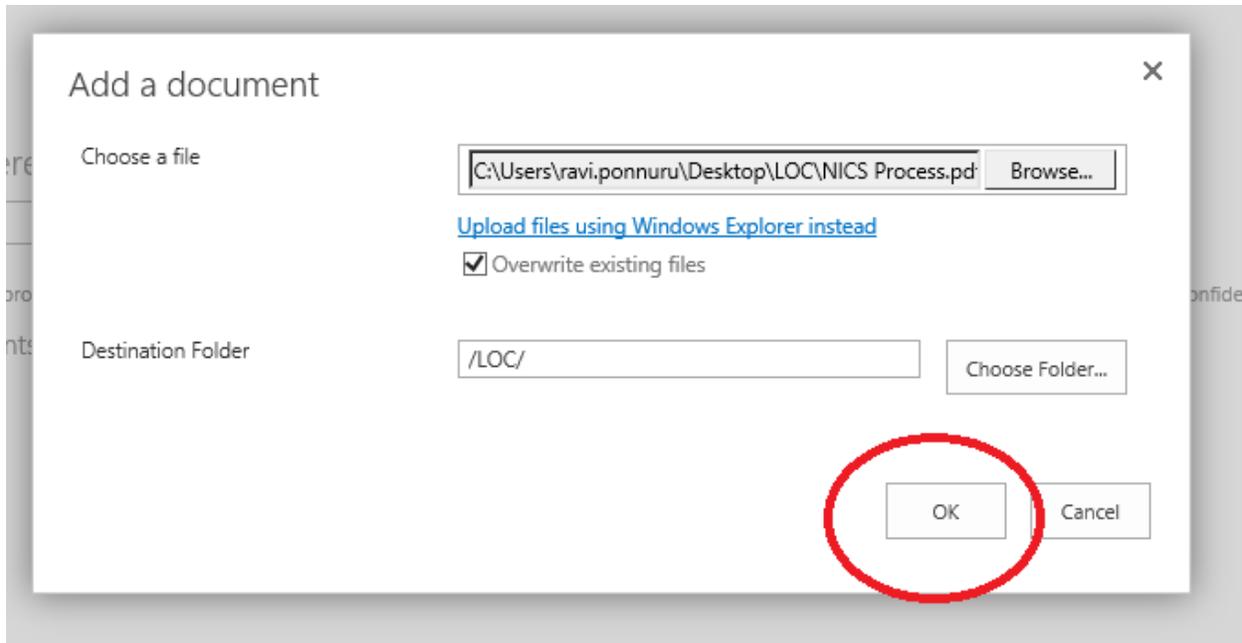


12. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document** to SharePoint
 10. Click on **+new document**
 11. Click on **chose file**



12. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on “Open” once done selecting
13. You will be back on previous screen → **Click on OK**





14. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
15. **Add Section →** Select “**LOC**” from the option set
16. **Add Category →** Select the reason for what you are uploading the document → in this case it should = **LOC –Waiver**
17. **Check Primary Verification** if this is a Primary Verification document
18. Click **OK** – User will be back on Initial Stage



9449172 - NICS Process.pdf

EDIT

Check In Cancel Paste Copy Delete Item

Commit Clipboard Actions

A summary of this resource

Section * [dropdown]

Category * Choose Section: [dropdown]

LOC Number [text box]

LOC Status [text box]

Primary Verification

LOC Status

Primary Verification

LOC Number



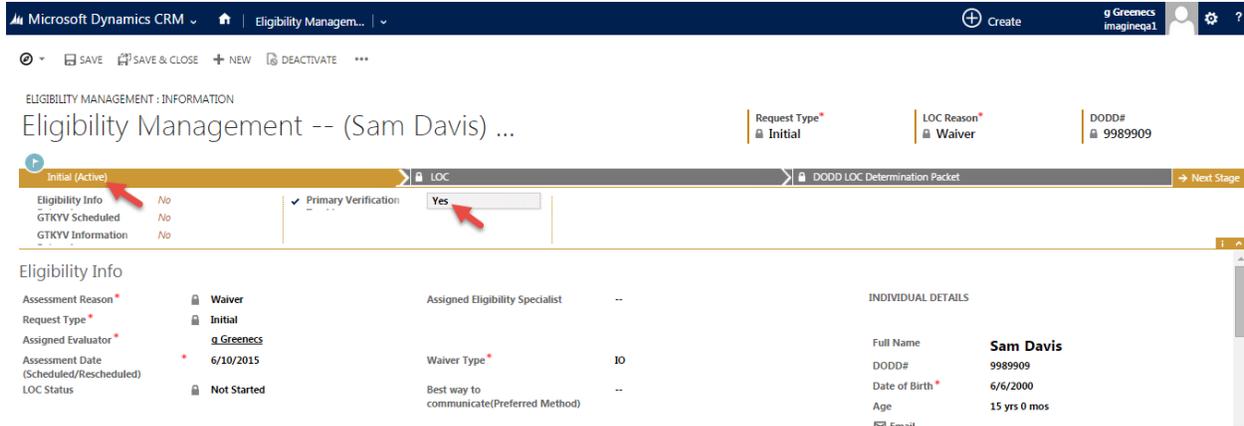
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13. On top of Initial Stage → Check **Primary Verification** as **YES** – This is a manual check for the user to confirm that user has uploaded the primary verification document to support this LOC



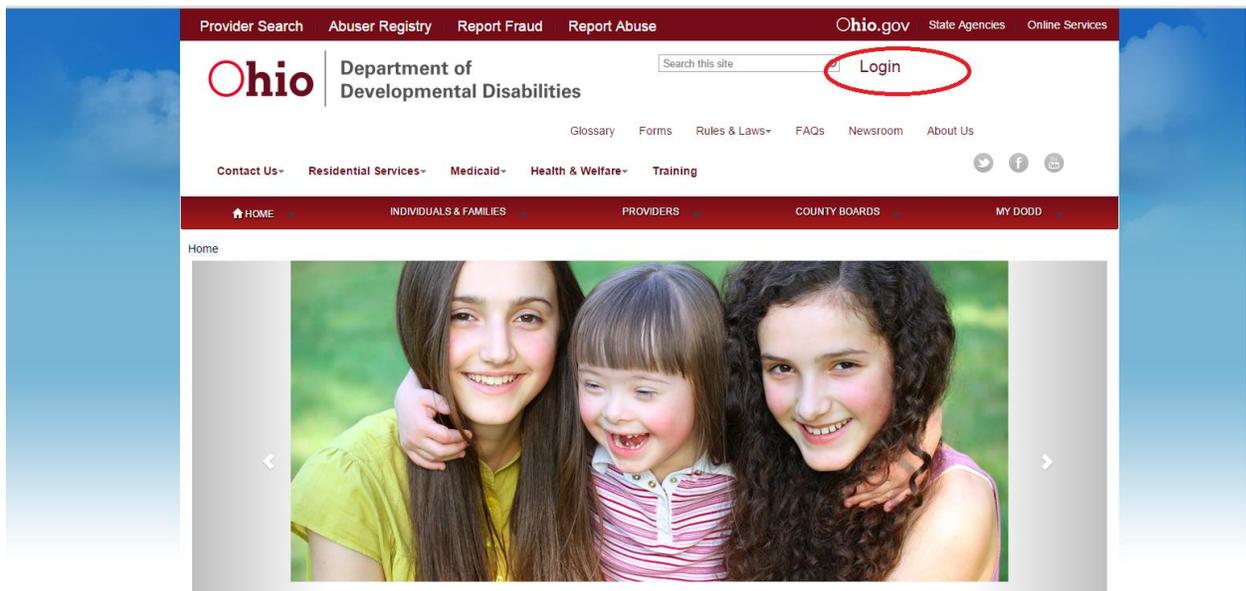
14. **Cannot Move to LOC stage (has to be an evaluator)**



2. Eligibility Specialist (IDS Edit)

Login

1. **Open Your Browser** (internet explorer or chrome)
2. Click on login from DODD Home Page

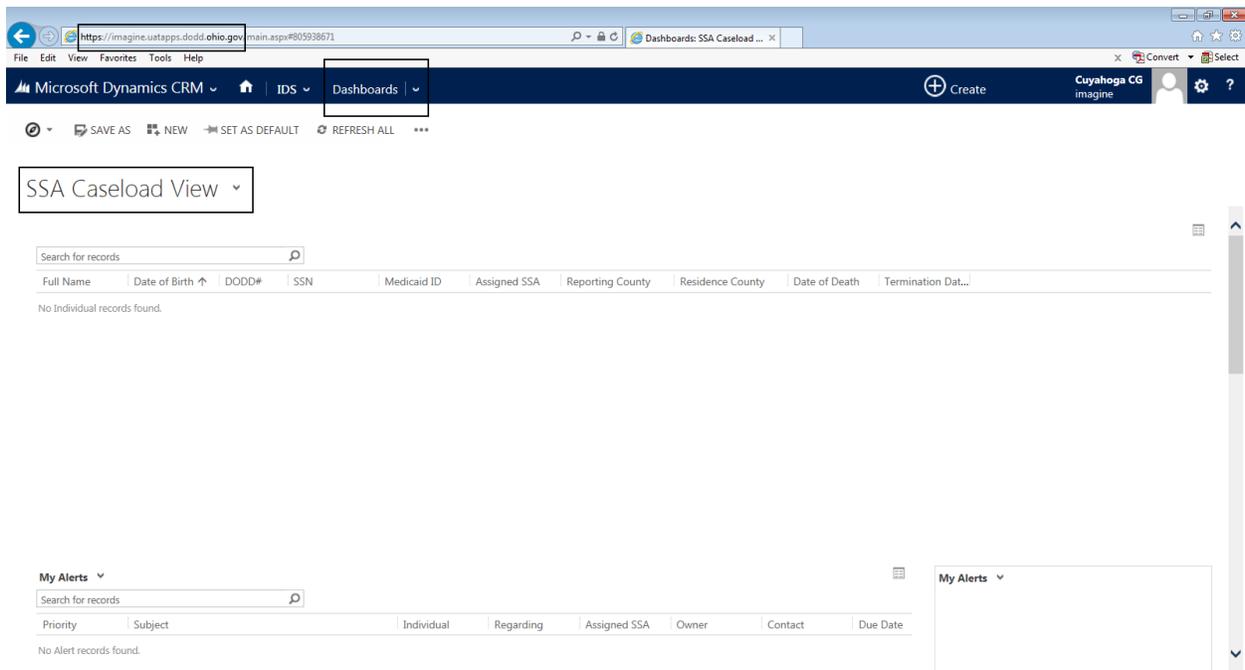


3. **Enter your User Name and Password**
(Role: Eligibility Specialist)



Dashboard

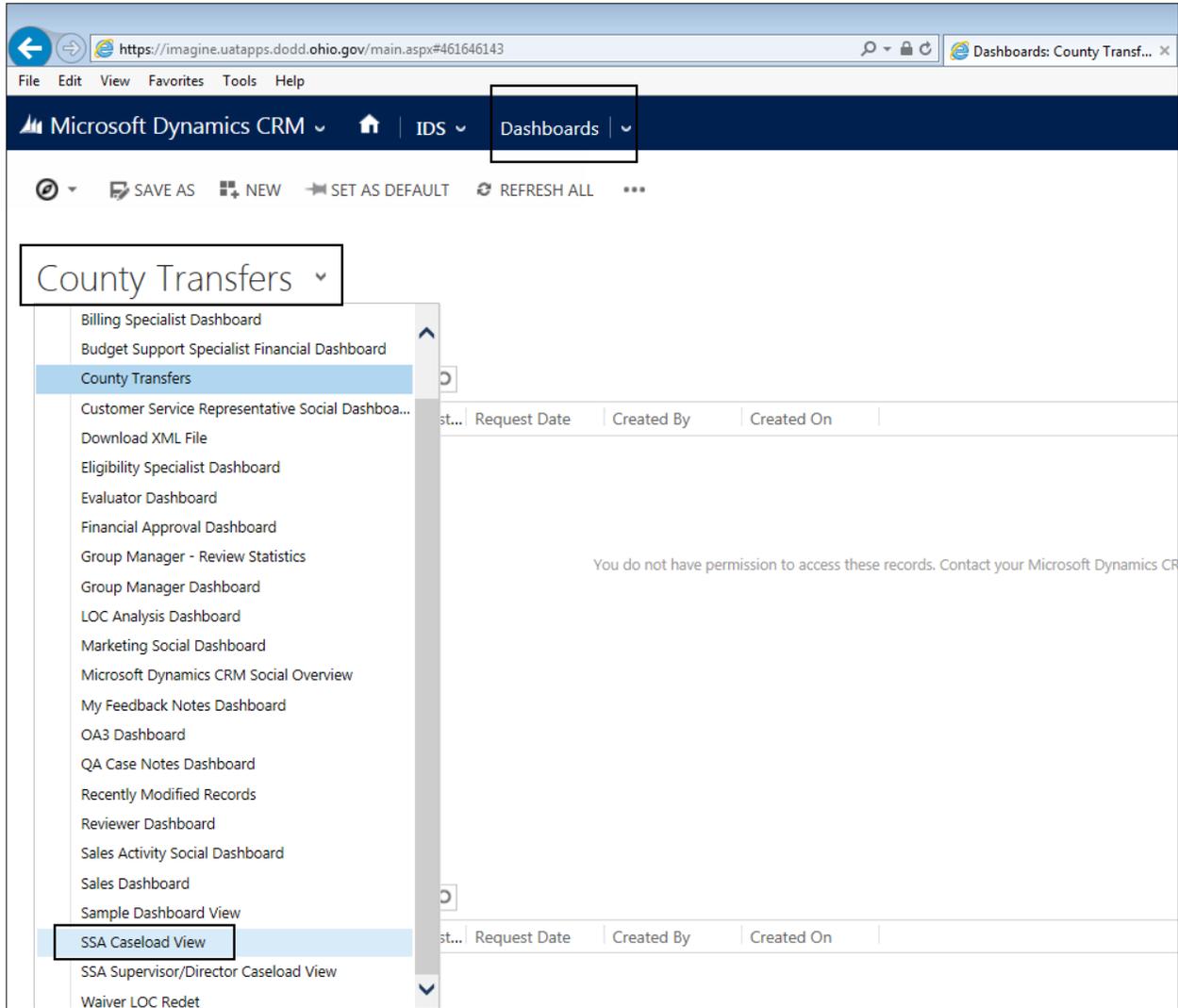
4. Once the user has logged in they will be taken to the Eligibility Specialist **Dashboard**



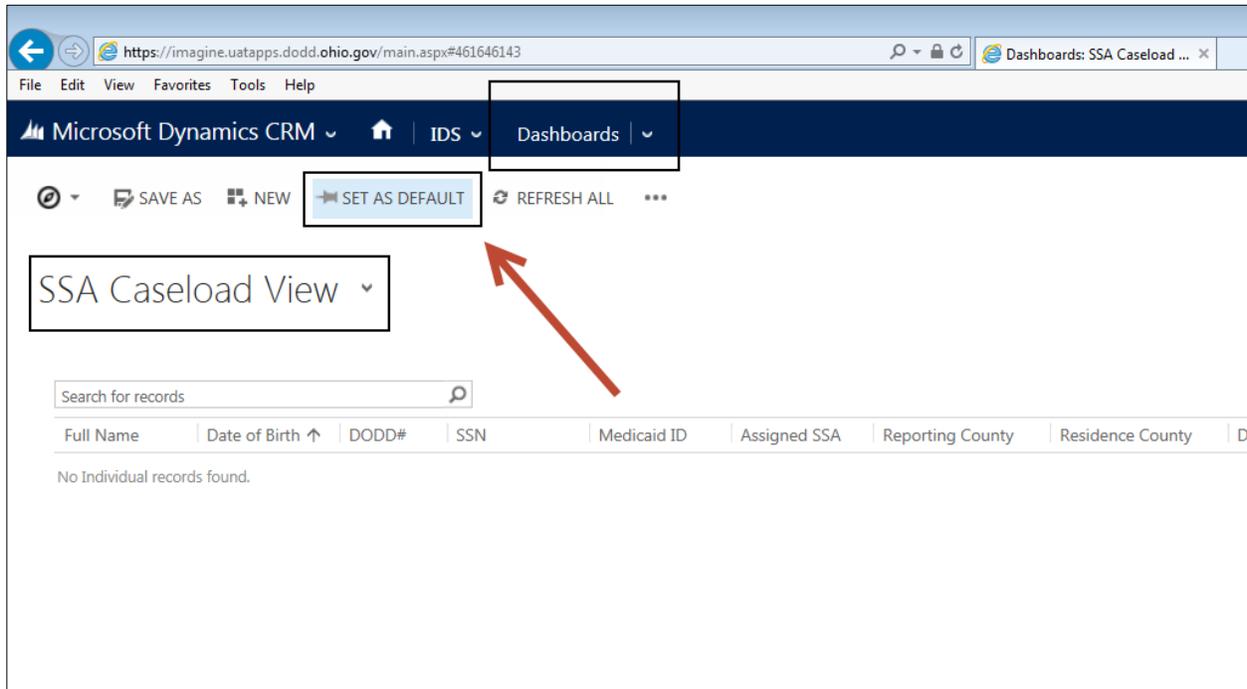
5. If you don't see the SSA Caseload View:

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





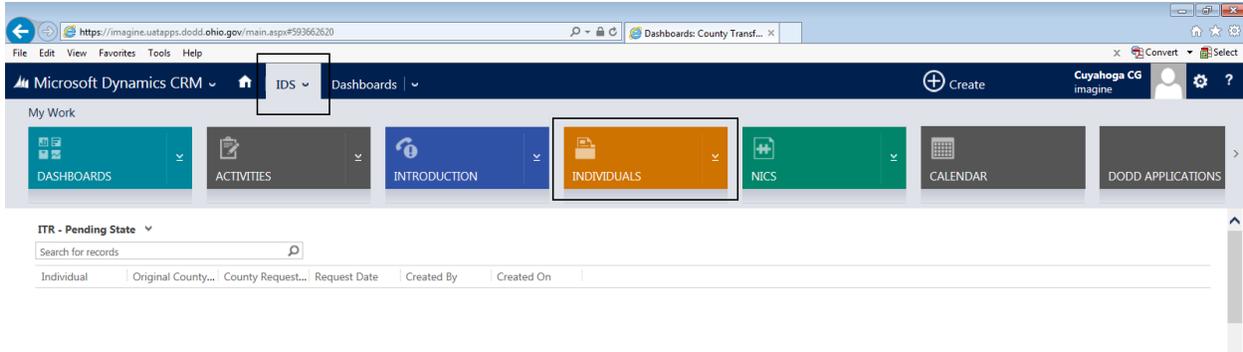
4. Finally, click on “Set as Default” on top of this dashboard page if you wish to pin this as your **Home** landing page.



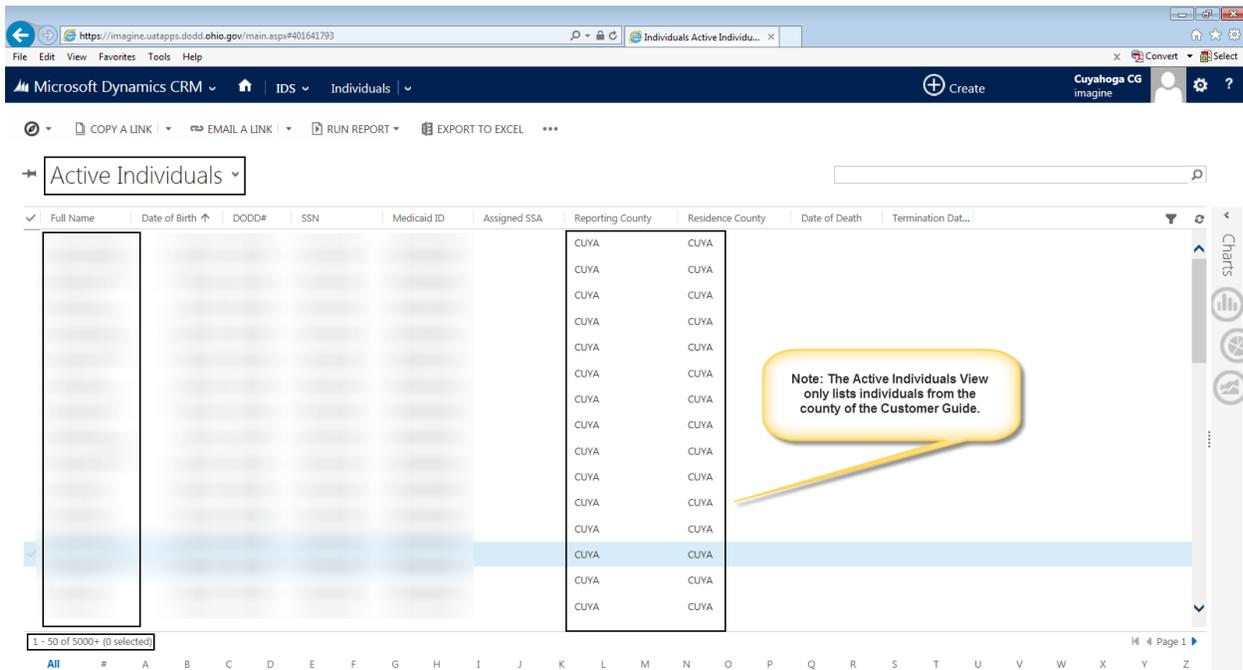
Access Individual

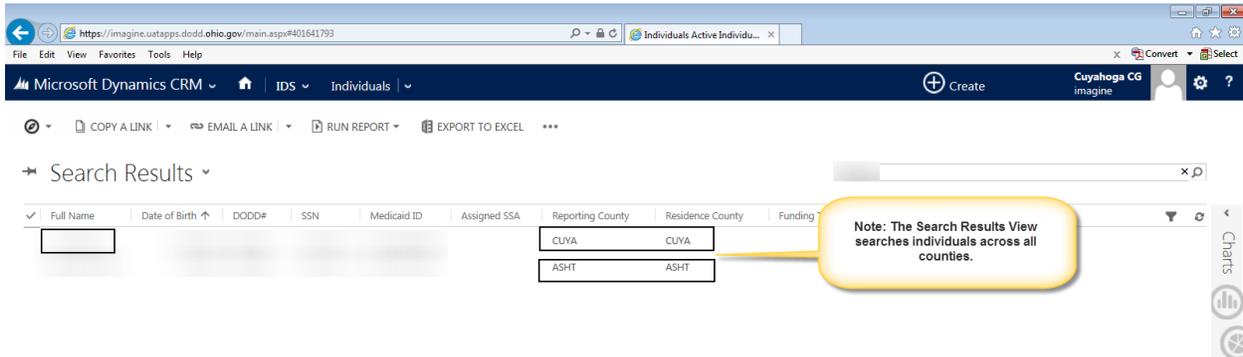
6. To access list of individuals in your county:
 1. Scroll over the **IDS** icon to display all of the tiles (entities) under the IDS application. Click the **INDIVIDUALS** tile.





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





Edit Individual's Information

8. Edit an Individual's Front Page information

1. 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.



Before edit:

Individual: INFORMATION

Front Page

Current As Of: 6/1/2015

Email

First Name * [Redacted]
Middle Name * [Redacted]
Last Name * [Redacted]
Generation: --

Date Of Birth * [Redacted]
Age: [Redacted]
Full Name: [Redacted]

Phone Information

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

Addresses

Additional Demographics

Individual IDs

DODD#	[Redacted]	SSN	[Redacted]
Medicaid ID:	[Redacted]		
Local ID Numbers	[Redacted]		
DODD#	[Redacted]	Medicaid ID	[Redacted]
		Reporting County	CUYA

Active

After edit:

Individual: INFORMATION

Front Page

Current As Of: 6/8/2015

Email

First Name * [Redacted]
Middle Name * [Redacted]
Last Name * [Redacted]
Generation: --

Date Of Birth * [Redacted]
Age: [Redacted]
Full Name: [Redacted]

Phone Information

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

Addresses

Additional Demographics

Individual IDs

DODD#	[Redacted]	SSN	[Redacted]
Medicaid ID:	[Redacted]		
Local ID Numbers	[Redacted]		
DODD#	[Redacted]	Medicaid ID	[Redacted]
		Reporting County	CUYA

Active



Add Address

9. Add an Individual's Address information

1. Expand the Address section of the Individual
2. Click the Plus sign at the right top of this section to go to



3. 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**



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



4. Click the **+New** button



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5. 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

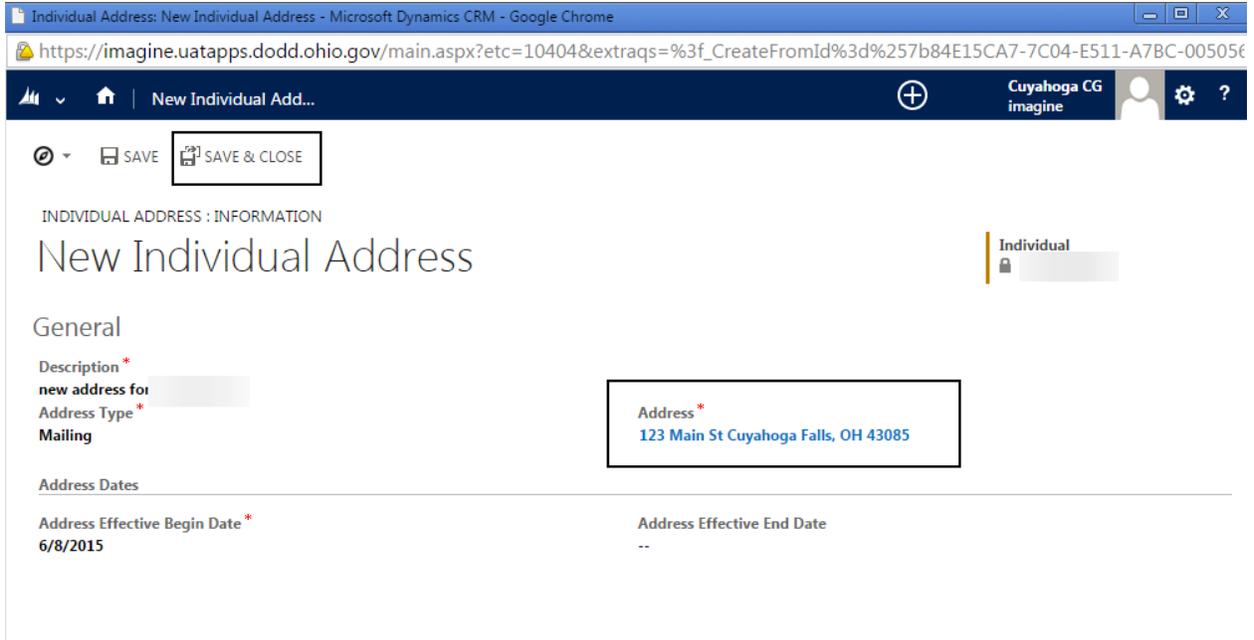
Zip* 43085

Facility

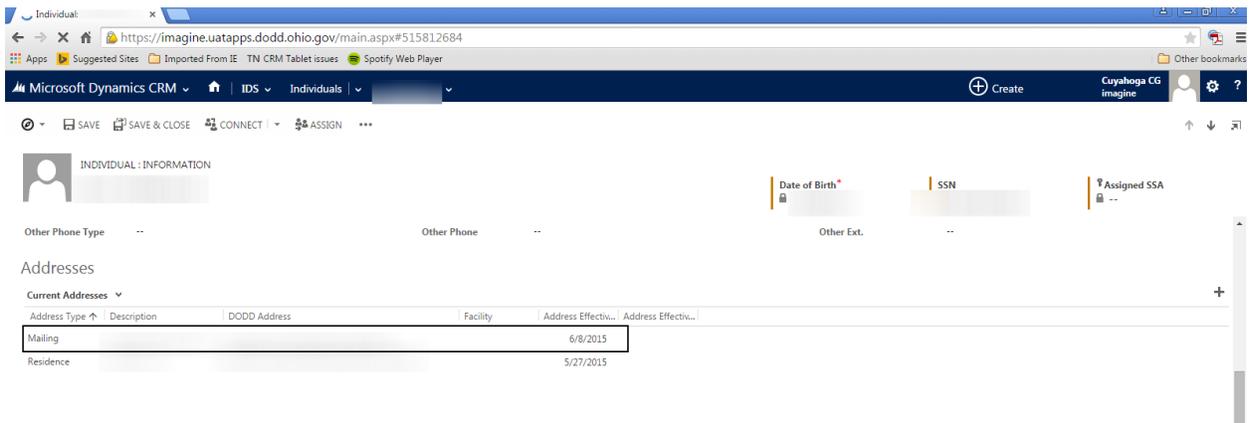
SAVE SAVE & CLOSE

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





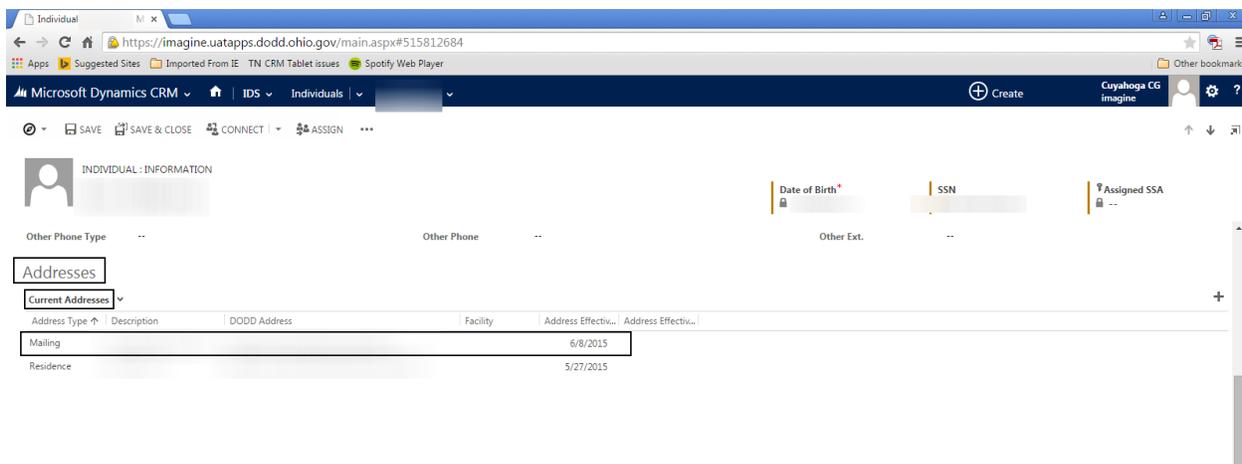
7. You will now see the new address listed under Current Addresses.



Edit Individual Address

10. Edit an Individual Address

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

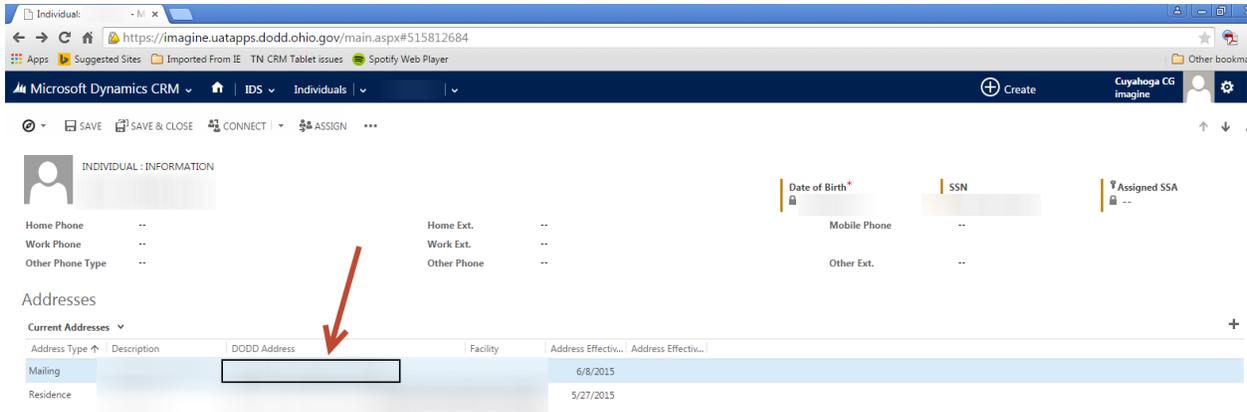


2. Click the field (Hyperlink) called **DODD Address** to open the Individual Address you would like to edit. This will take you directly to the *actual address* information.

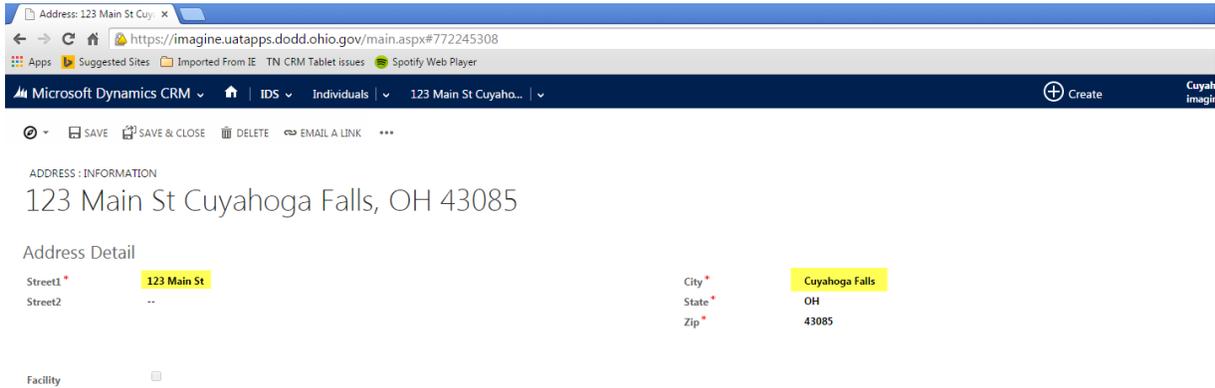
Note: Clicking the row instead of the DODD Address will allow you to edit the Description and Address Effective Begin Date but not the Address directly.

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

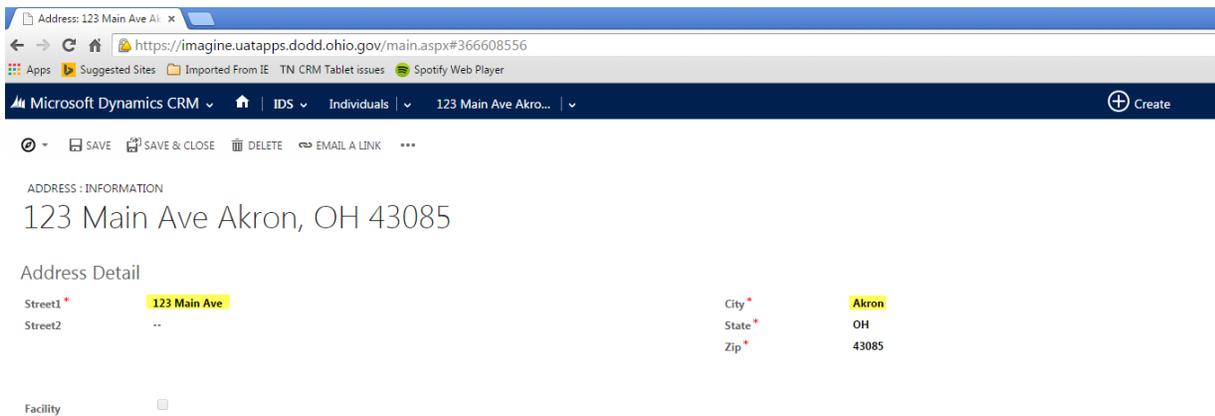




Before edit:



After edit:



Edit Service and Support

11. Edit (add or remove) Services and Support

1. 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.

INDIVIDUAL : INFORMATION

Date of Birth* SSN

Front Page
Addresses
Additional Demographics
County Information
Services and Supports

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

Age 82 +, but Pre-school selected

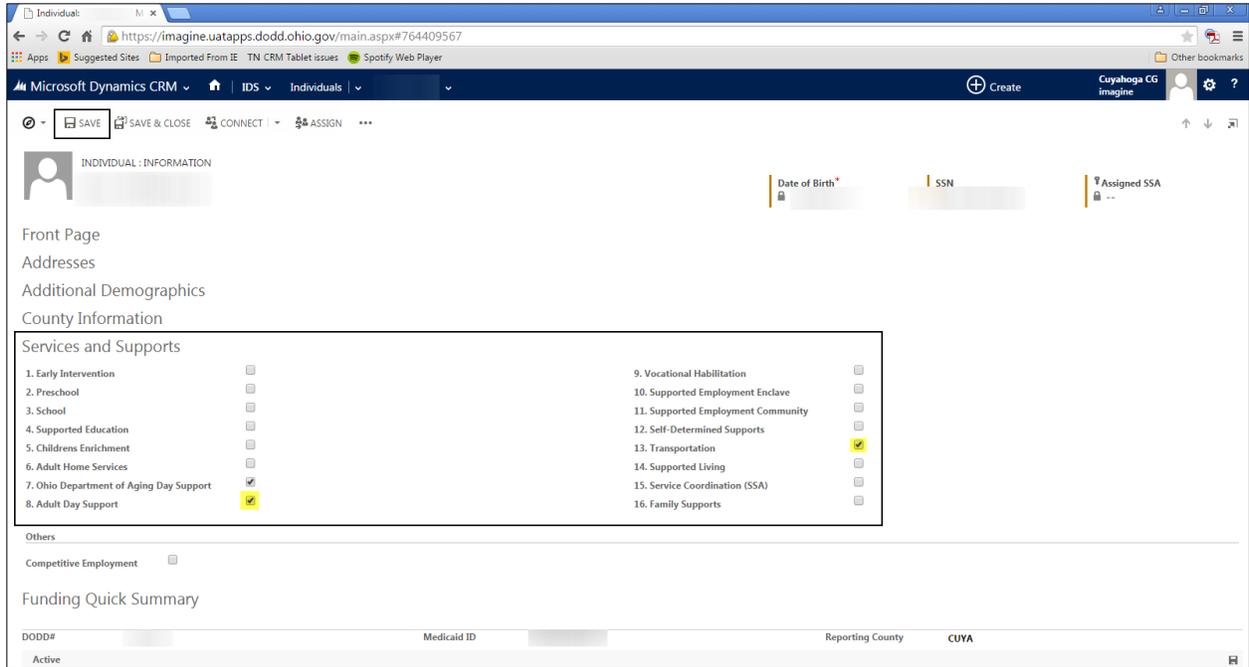


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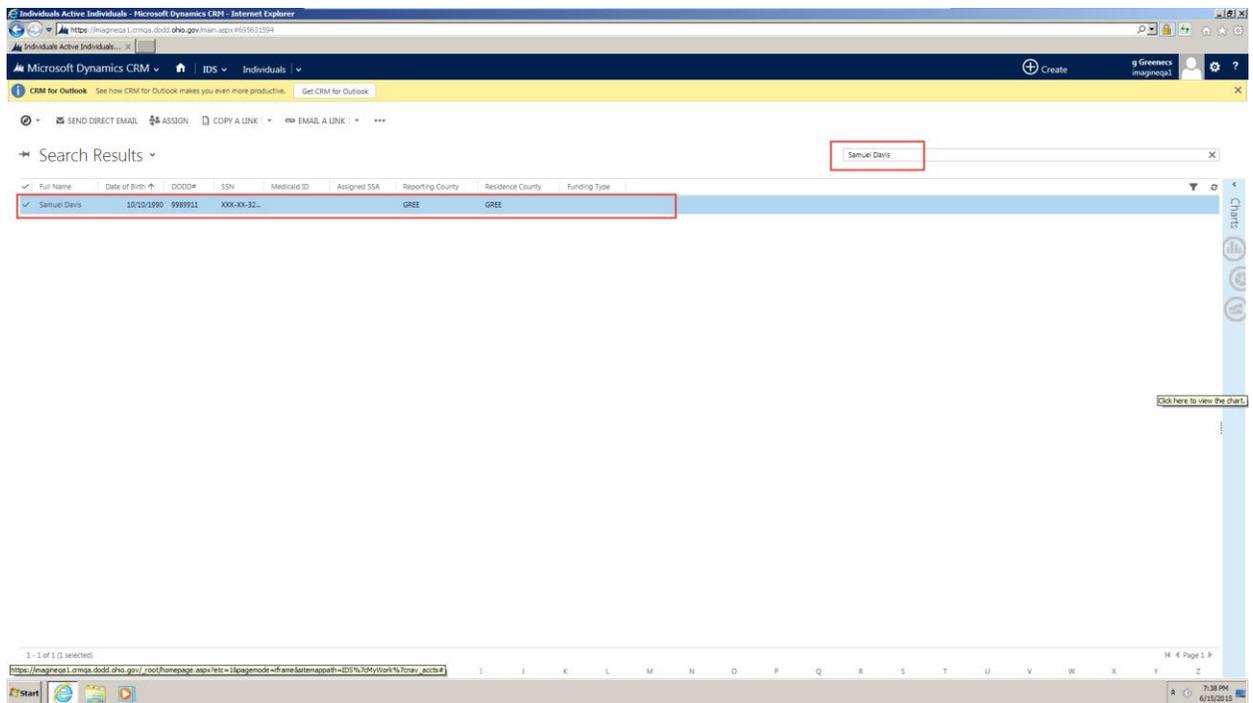
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Decision Tree for County Board Eligibility

1. To start county board eligibility for an Individual, Search for individual by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box
3. **Individual record will show up** if individual exist in your county



4. Double click on individual record to open individual's record

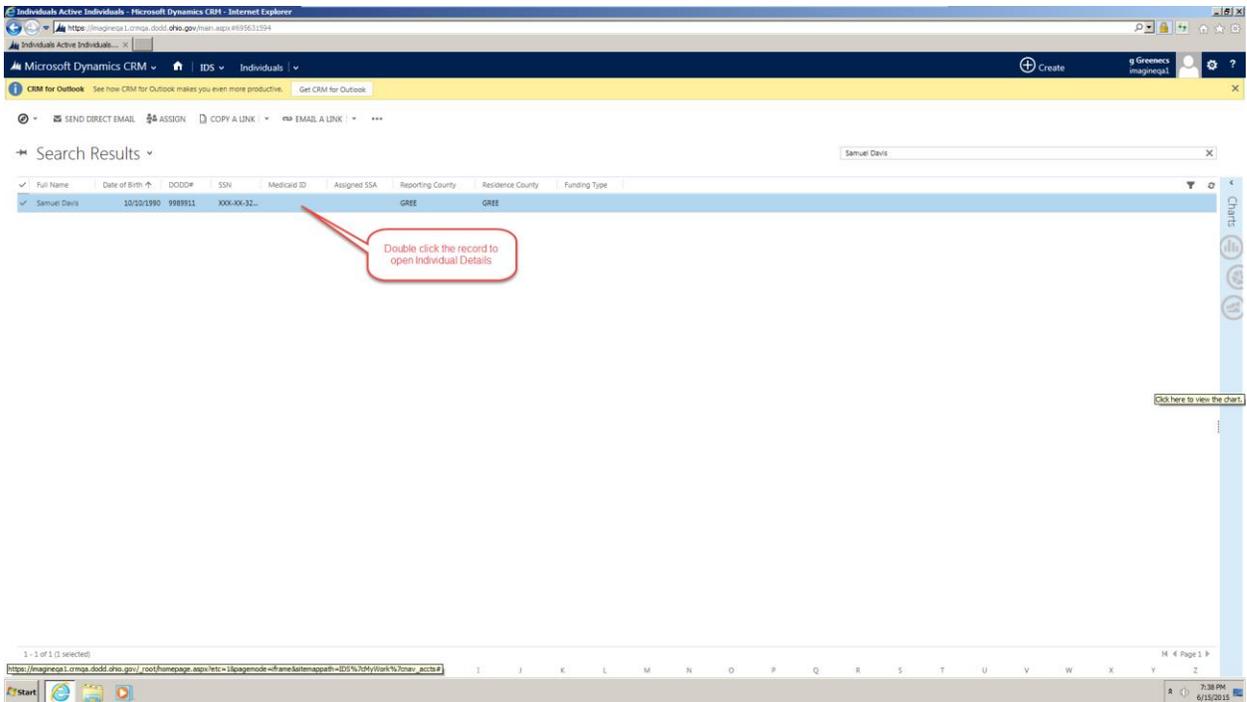


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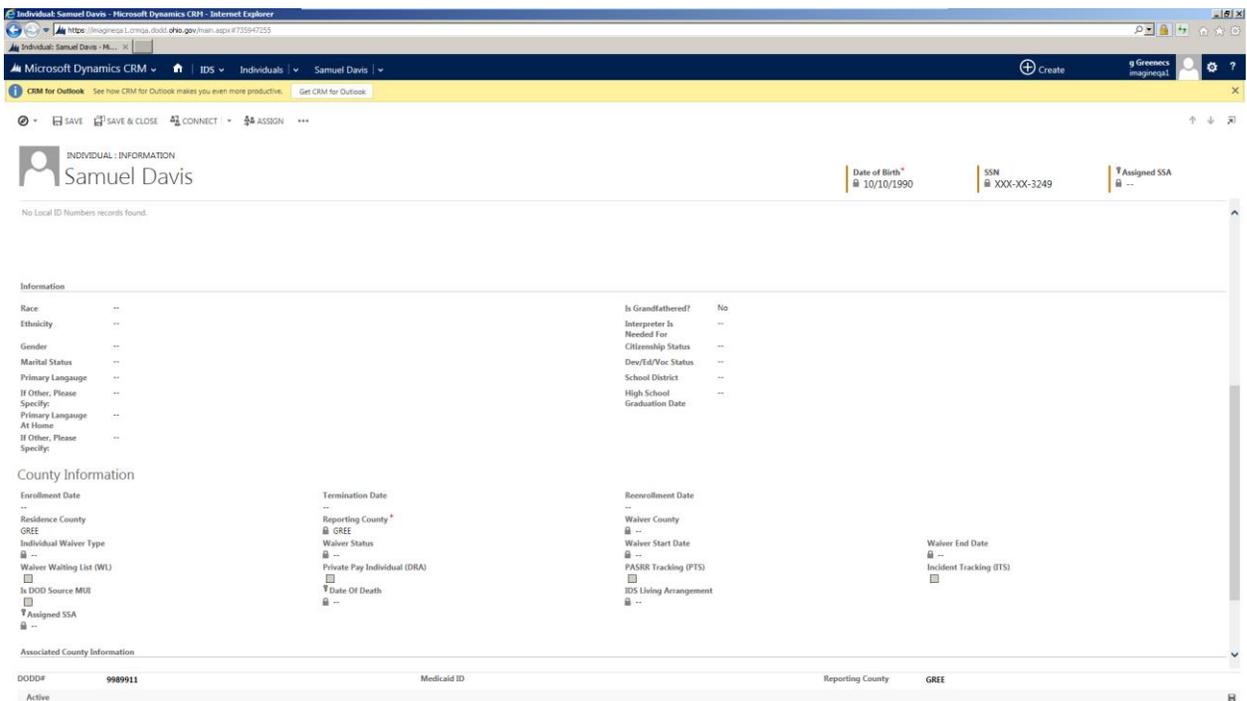
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5. User will land on Individual front page.



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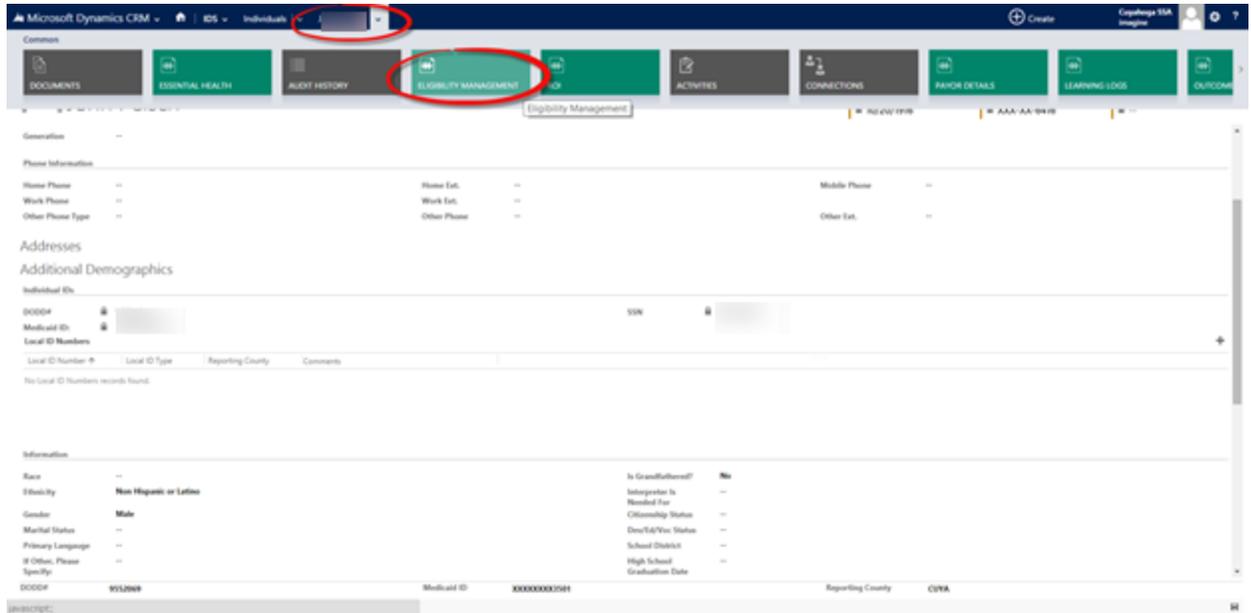
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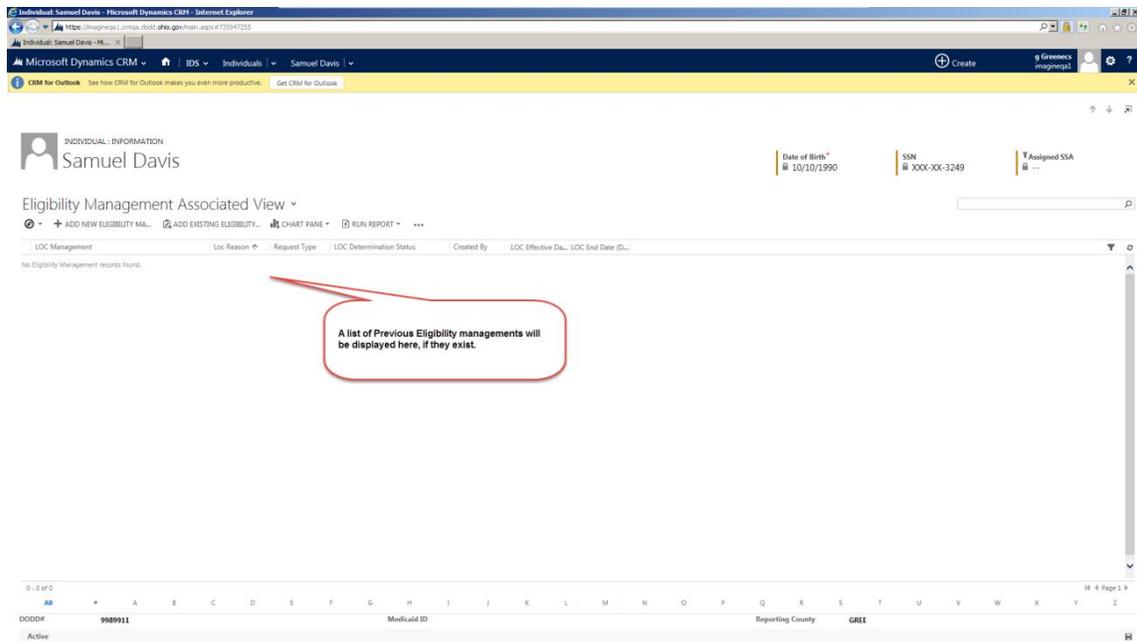
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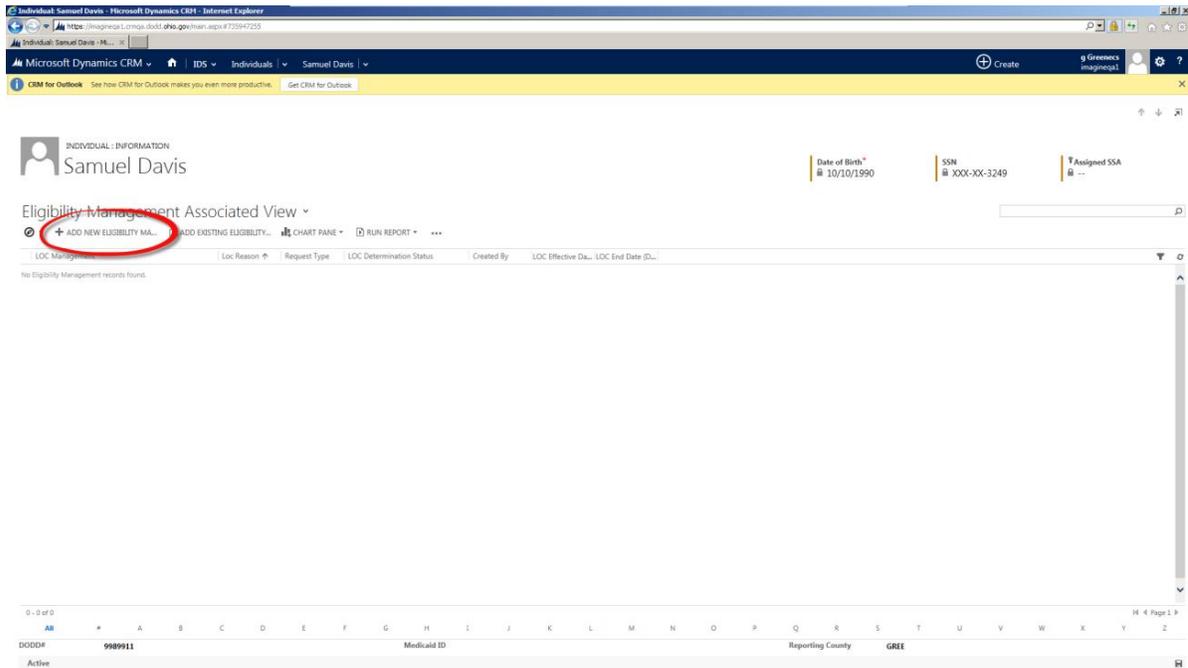
6. Start Eligibility Process - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



7. User will land on **Eligibility Management View Page**—you can see all the eligibilities done for that individual.



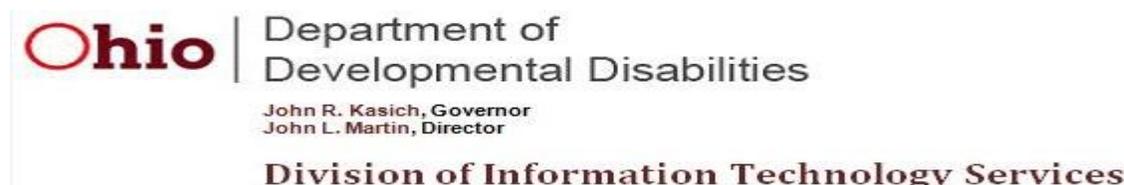
8. Add New Eligibility Management



9. Enter required information on **Initial stage** to Save Eligibility management

1. **Assessment Reason** = select County Board Eligibility
2. **Assessment Type** = Initial
3. **Assessment Date** = can be today's or past date – it's when you are got this information from individual
4. **Assign Eligibility Specialist** = click on the magnifying and select the eligibility specialist who will work with the individual
5. **Date of Visit** = can be today's or past date – it's when you met with individual to capture this information

Click on SAVE button.



The screenshot shows the 'New Eligibility Management' form in Microsoft Dynamics CRM. The form is divided into several sections: 'Eligibility Info', 'Assigned Eligibility Specialist', 'Individual Details', and 'Verification Tracking'. Red callouts are placed over specific fields: 1 points to 'County Board Eligibility', 2 to 'Request Type', 3 to 'Assessment Date', 4 to the 'Assigned Eligibility Specialist' dropdown menu, and 5 to 'Date of Visit'. The 'Individual Details' section shows information for Samuel Davis, including DOB, age, and reporting county. The 'Verification Tracking' section includes a table for 'LOC Date Change Requests'.

Name	Created On	DCDD #	Email	First Name	Last Name	Reporting Count...	LOC Autonumber...	Type
To enable this content, create the record.								



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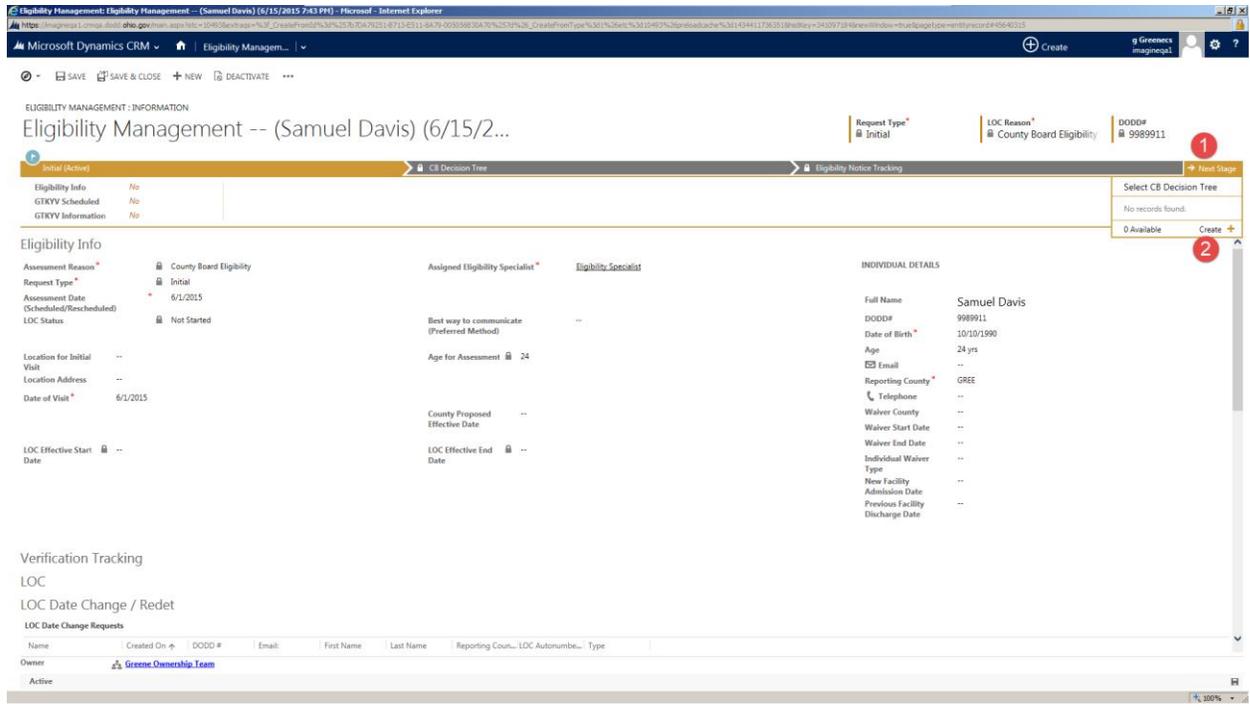
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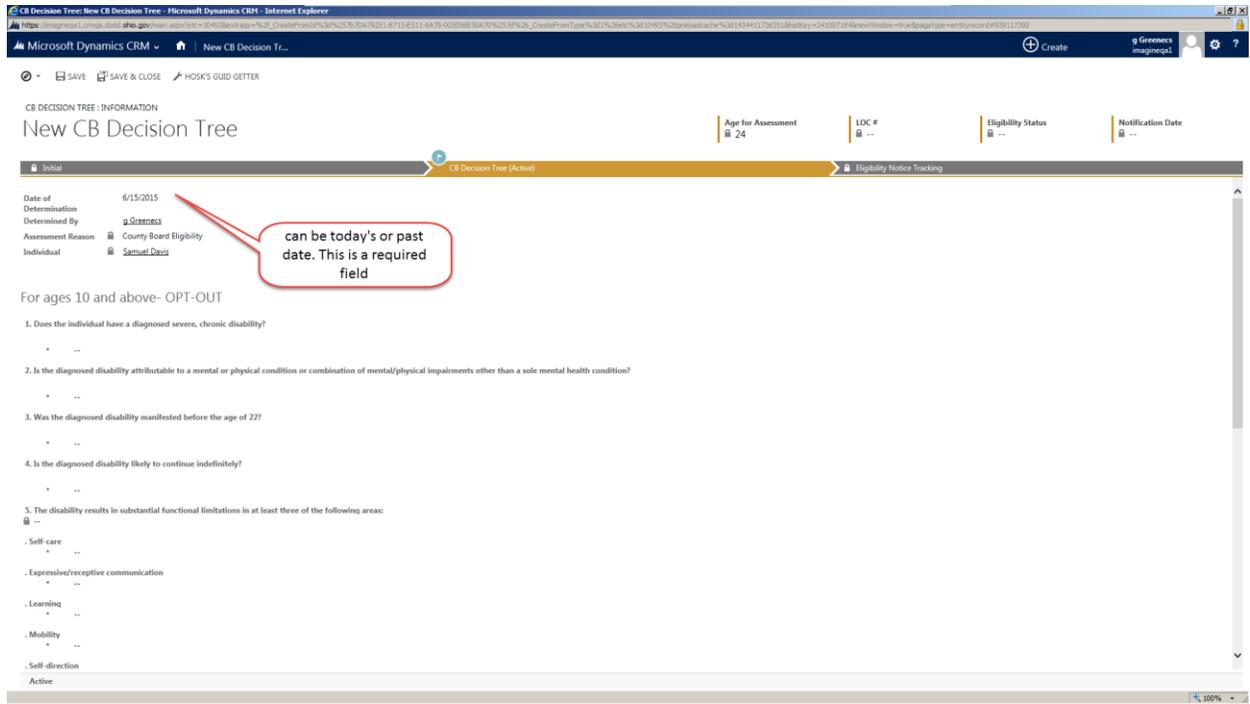
10. Move to **Decision Tree** stage → by clicking on the “**Next Stage**” and **Create+** on Next Stage



NOTE: The decision tree is available based on the individual’s present age (Birth to 2, 3 to 5, 6 to 9 and 10 and above).



11. Enter the **Date of Determination** – can be today's or past date. This is a required field



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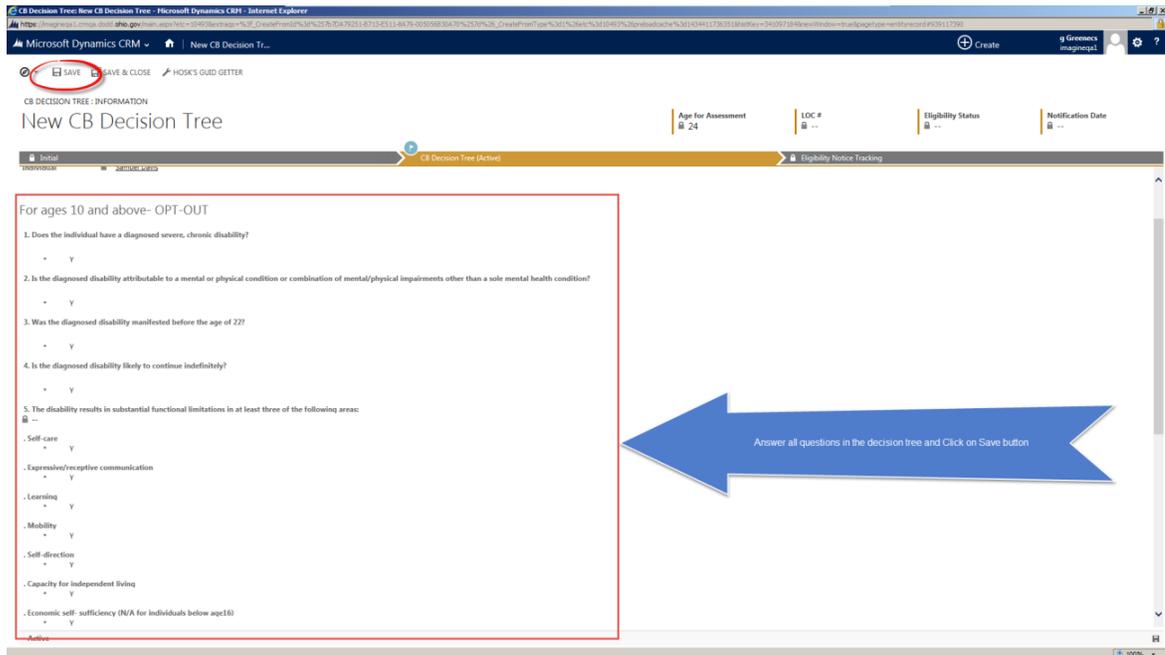
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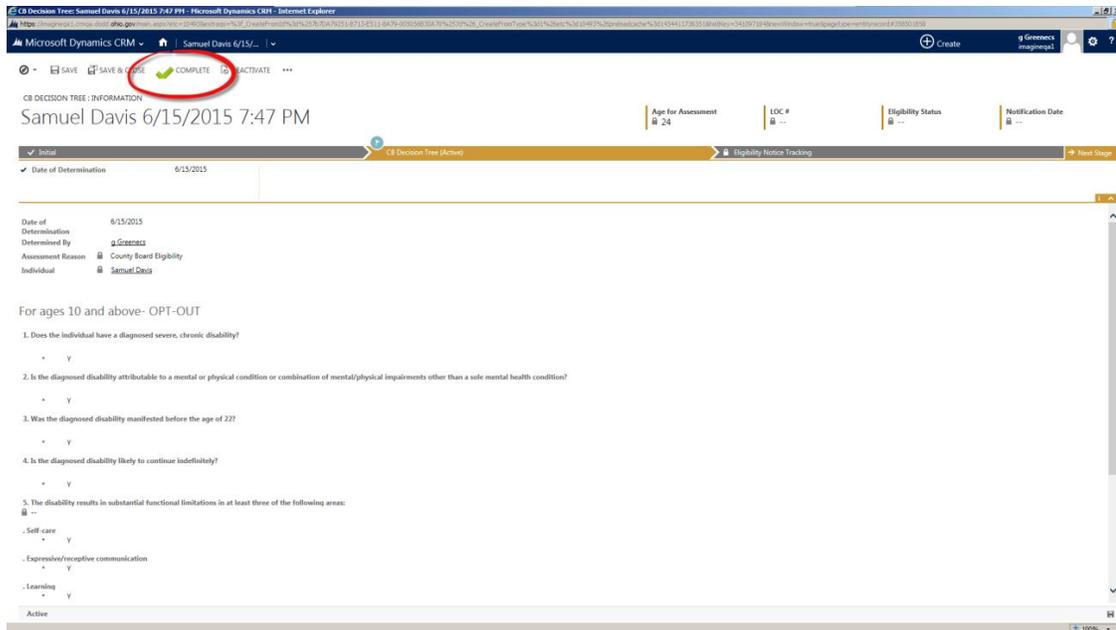


12. Answer all the questions on **Decision Tree**

13. **Save** or **Save and Close** at any time by clicking on the save button or the save and close button from top of this screen



14. Click on the **COMPLETE** button (appears only after Save) from top of this screen

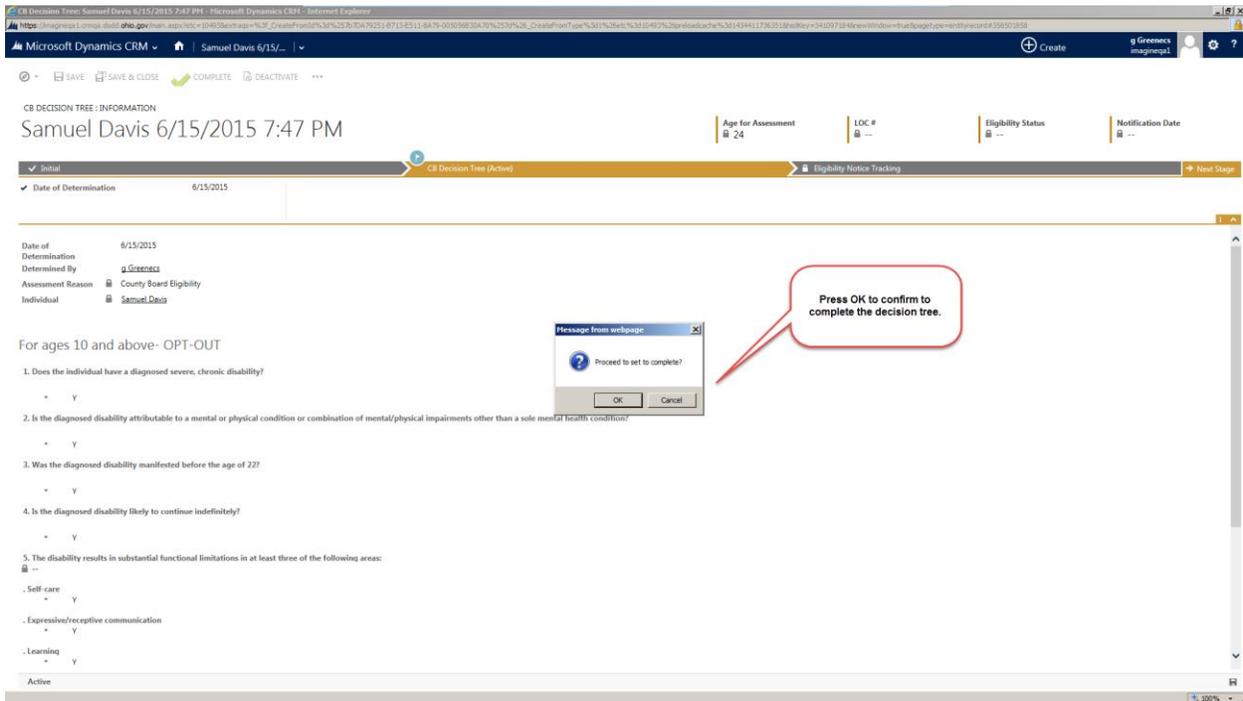


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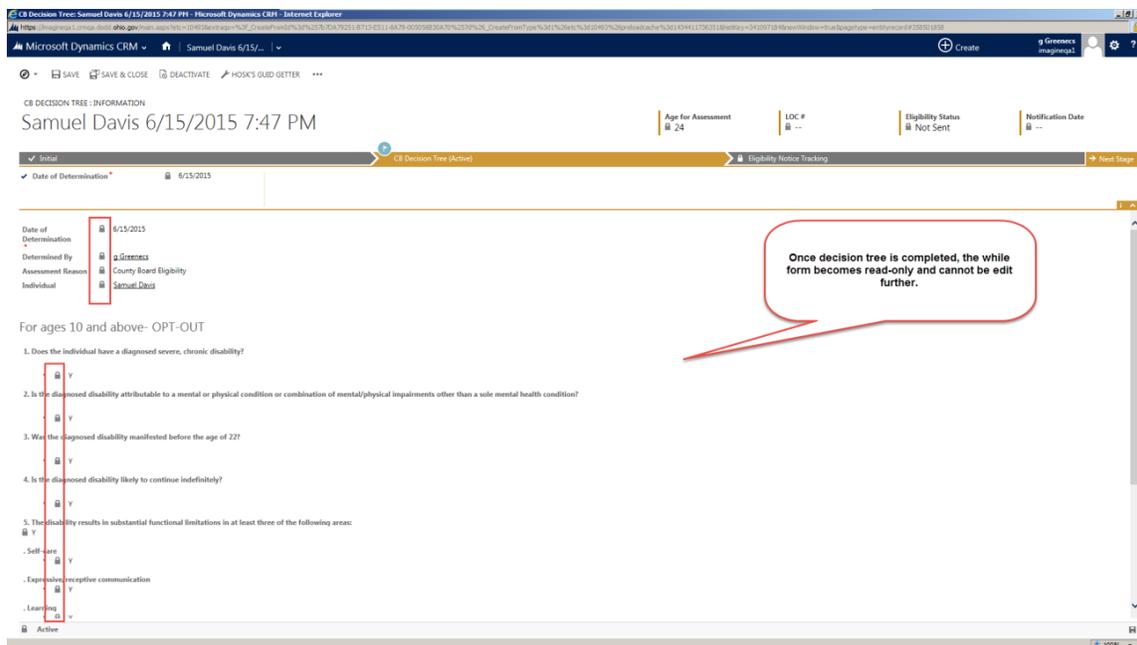
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15. Once Decision Tree is Completed → **Decision Tree becomes read only**; user will see the lock symbol next to all the fields and cannot edit anything now.



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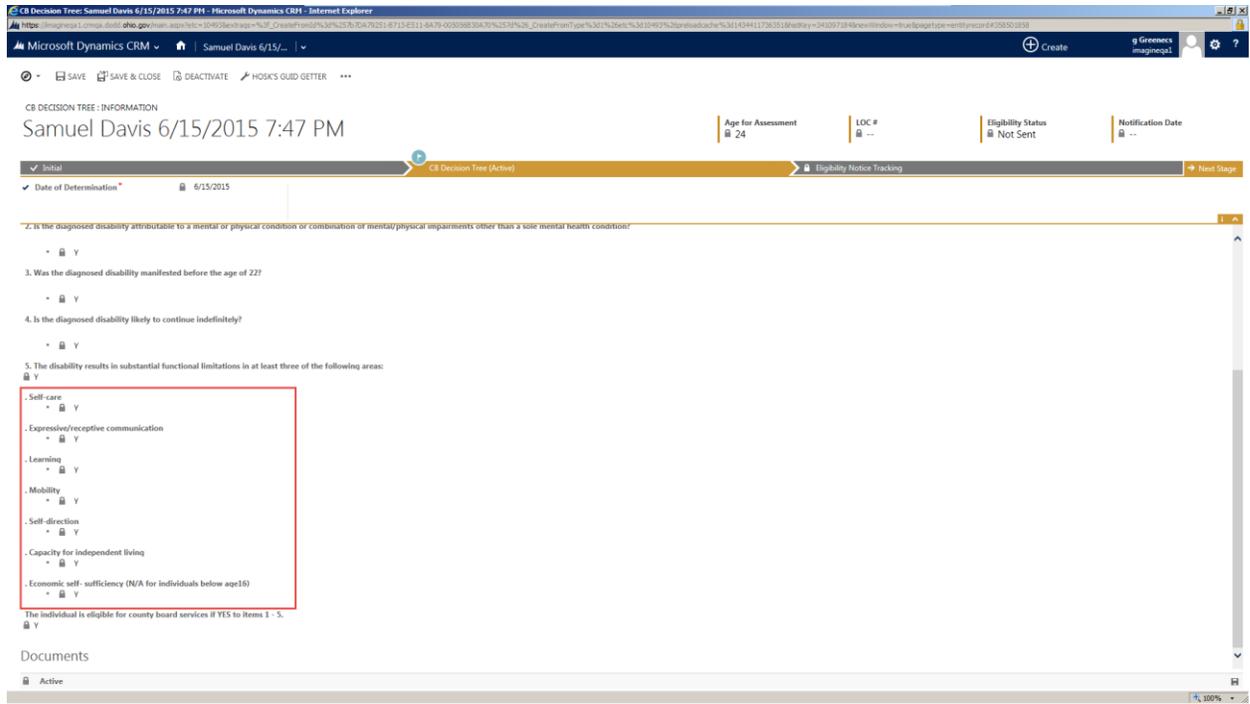
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16. User can view Y/N answer for question 5 after Decision Tree is Completed



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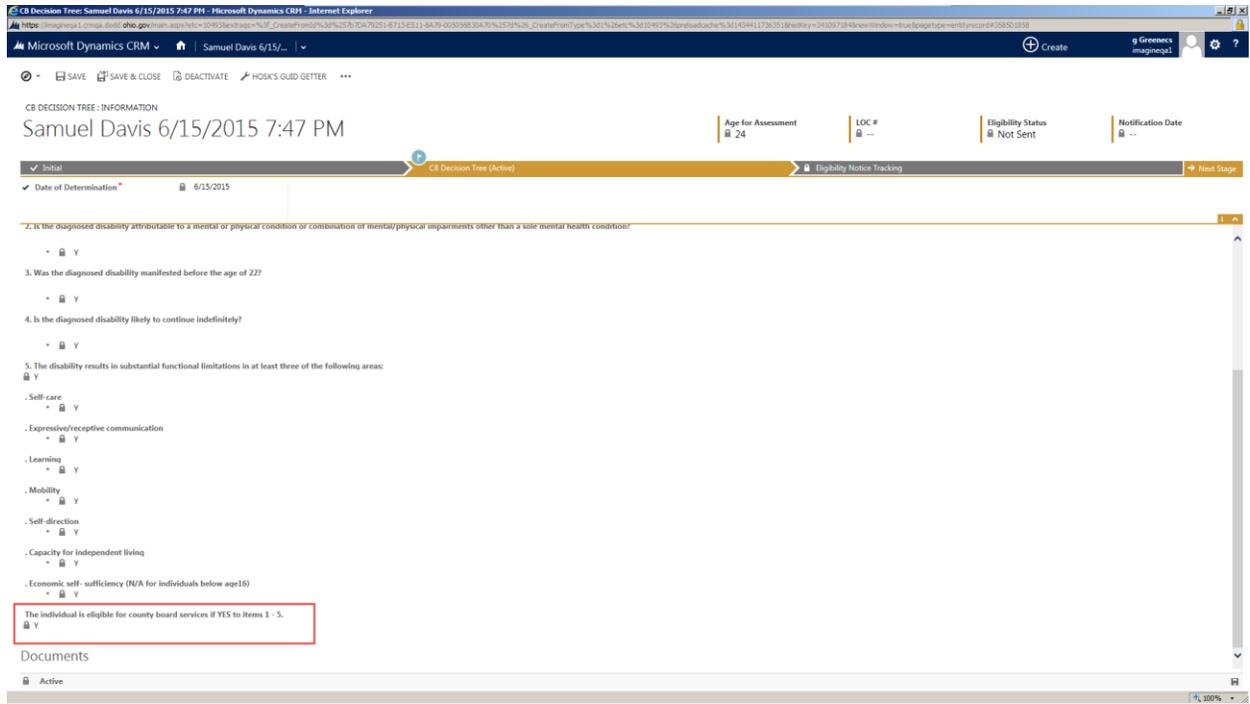
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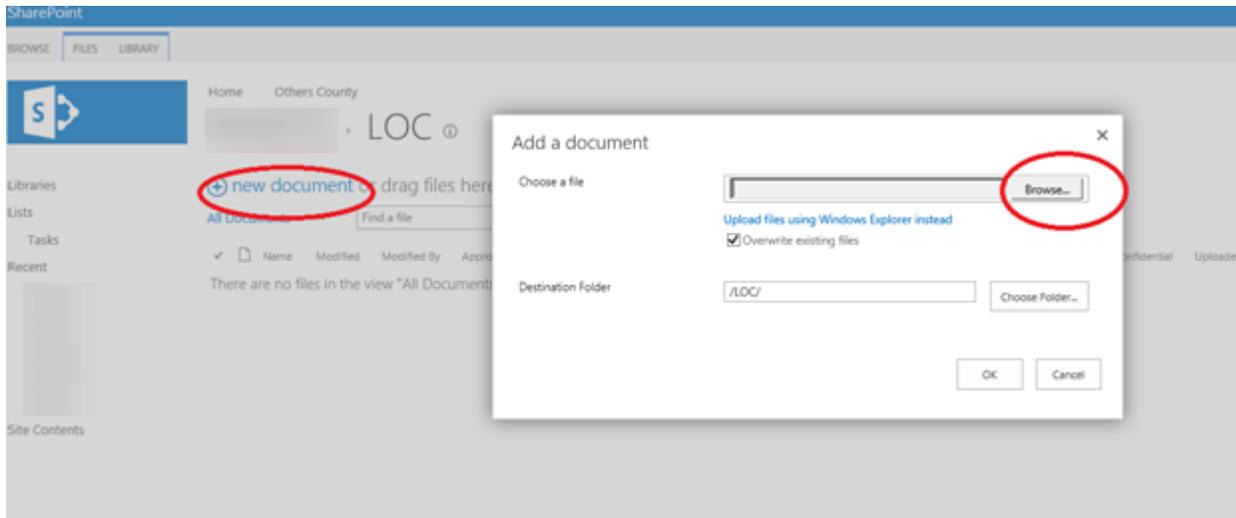
17. User will see a YES/NO for if individual is county board eligible once the Decision Tree is Completed.



18. You can upload document to SharePoint at any time – before or after Completing the Decision Tree

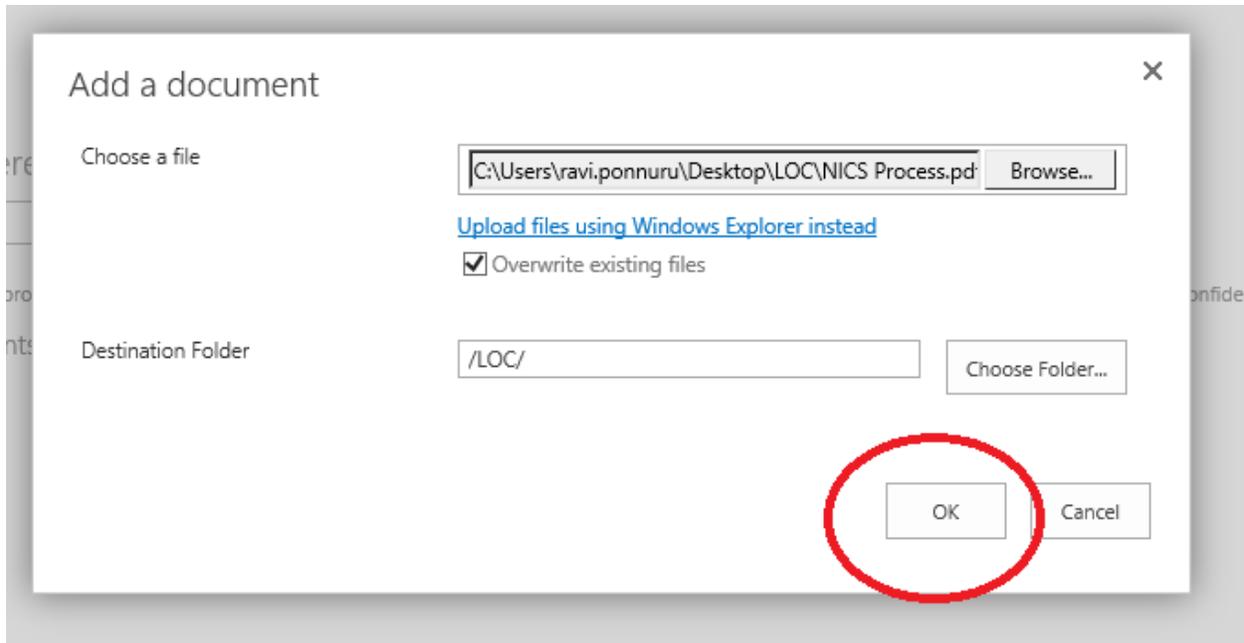


19. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document to SharePoint**
 1. Click on **+new document**
 2. Click on **chose file**



3. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on “Open” once done selecting
4. You will be back on previous screen → **Click on OK**





5. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
6. **Add Section →** Select “**LOC**” from the option set
7. **Add Category →** Select the reason for what you are uploading the document → in this case it should = **LOC –Waiver**
8. **Check Primary Verification** if this is a Primary Verification document
9. Click **OK** – User will be back on Initial Stage



9449172 - NICS Process.pdf

EDIT

Check In Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

A summary of this resource

Section * [dropdown]

Category * Choose Section: [dropdown]

LOC Number [input]

LOC Status [input]

Primary Verification

LOC Status

Primary Verification

LOC Number



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20. Move to **Eligibility Notice Tracking** stage → by clicking
1. on the “**Next Stage**” and
 2. **Select the Eligibility Notice** that is available.

Microsoft Dynamics CRM - Samuel Davis 6/15/2015 7:47 PM

Age for Assessment: 24 | LOC #: -- | Eligibility Status: Not Sent | Notification Date: --

Initial → CB Decision Tree (Active) → Eligibility Notice Tracking → Next Stage

Date of Determination	Determination	Determined By	Assessment Reason	Individual
6/15/2015	OPT-OUT	g.Greene	County Board Eligibility	Samuel Davis

For ages 10 and above- OPT-OUT

1. Does the individual have a diagnosed severe, chronic disability?
 Y N

2. Is the diagnosed disability attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?
 Y N

3. Was the diagnosed disability manifested before the age of 22?
 Y N

4. Is the diagnosed disability likely to continue indefinitely?
 Y N

5. The disability results in substantial functional limitations in at least three of the following areas:
 Y

- Self care Y N
- Expressive/receptive communication Y N
- Learning Y N
- Mobility Y N

1 Available

3. **Type of Notification** will auto populate per the result of the tool (**Eligible/Yes** on LOC Tool or **Ineligible/No** on the LOC Tool)

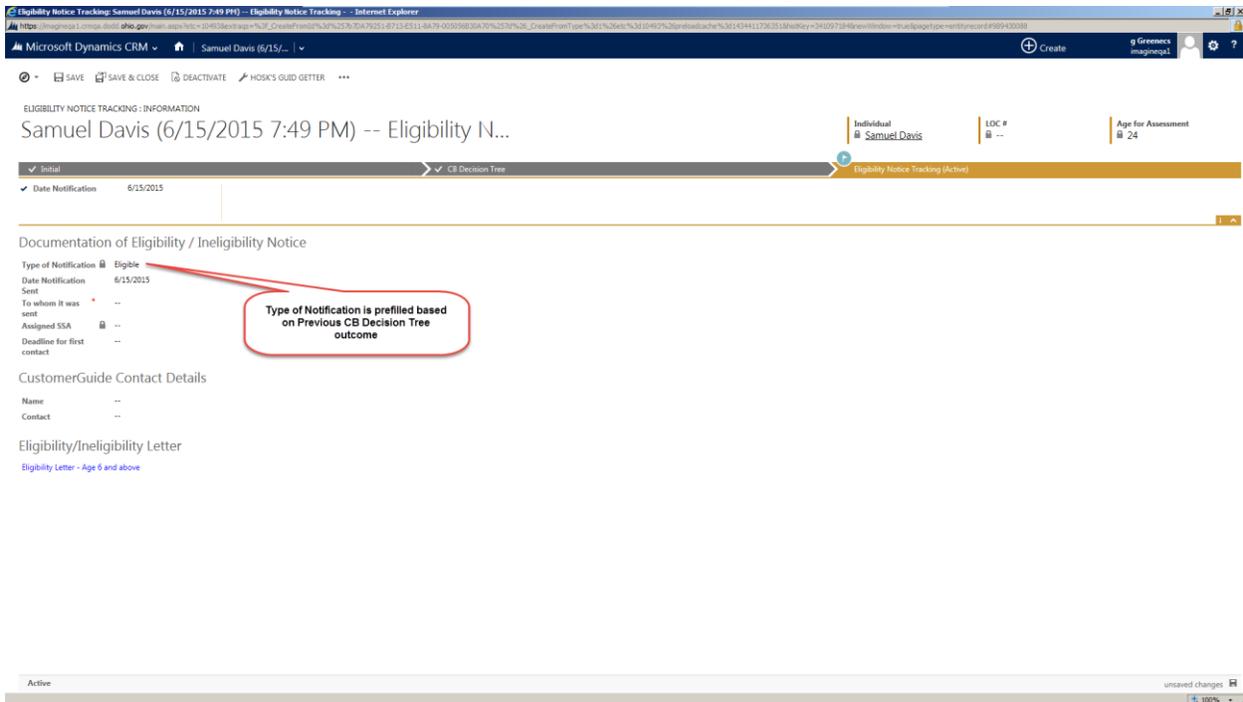


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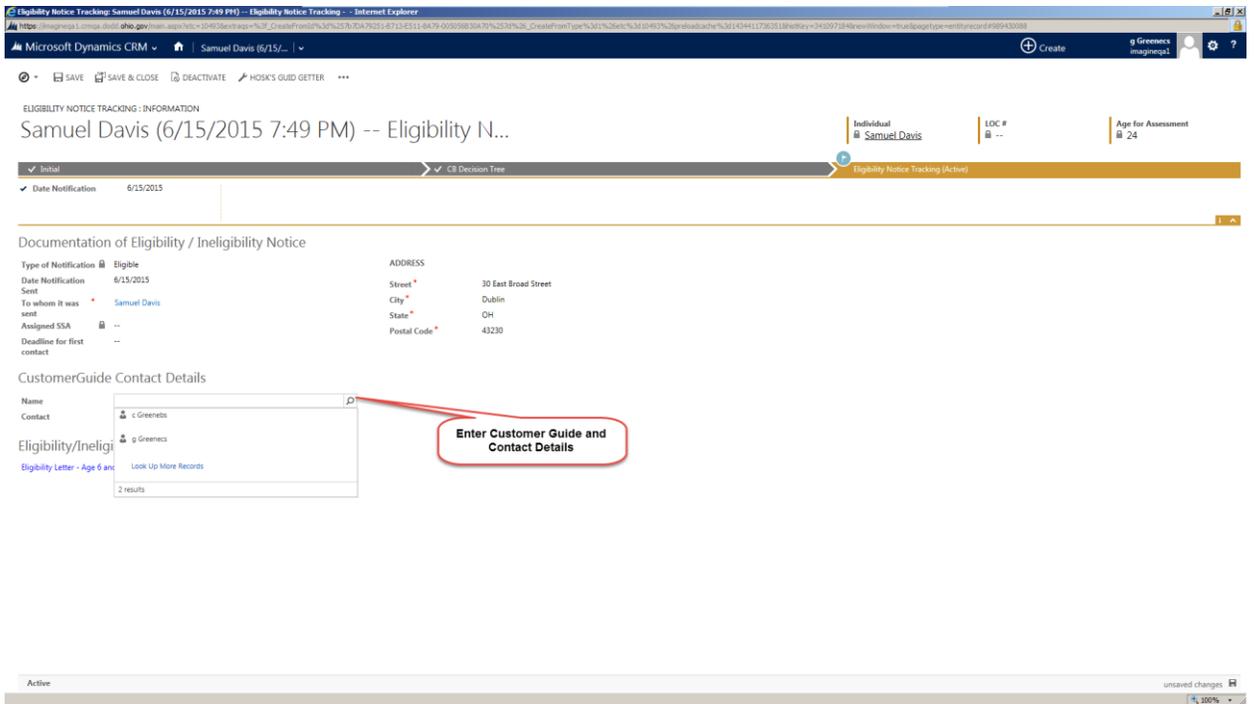
4. Enter **Date notification Sent** – date when you will send this notification to the individual. Not a required field.
5. Fill in **To Whom it was Sent**
 1. By selecting the Individual’s name or individual’s parent or guardian’s name from the option set.



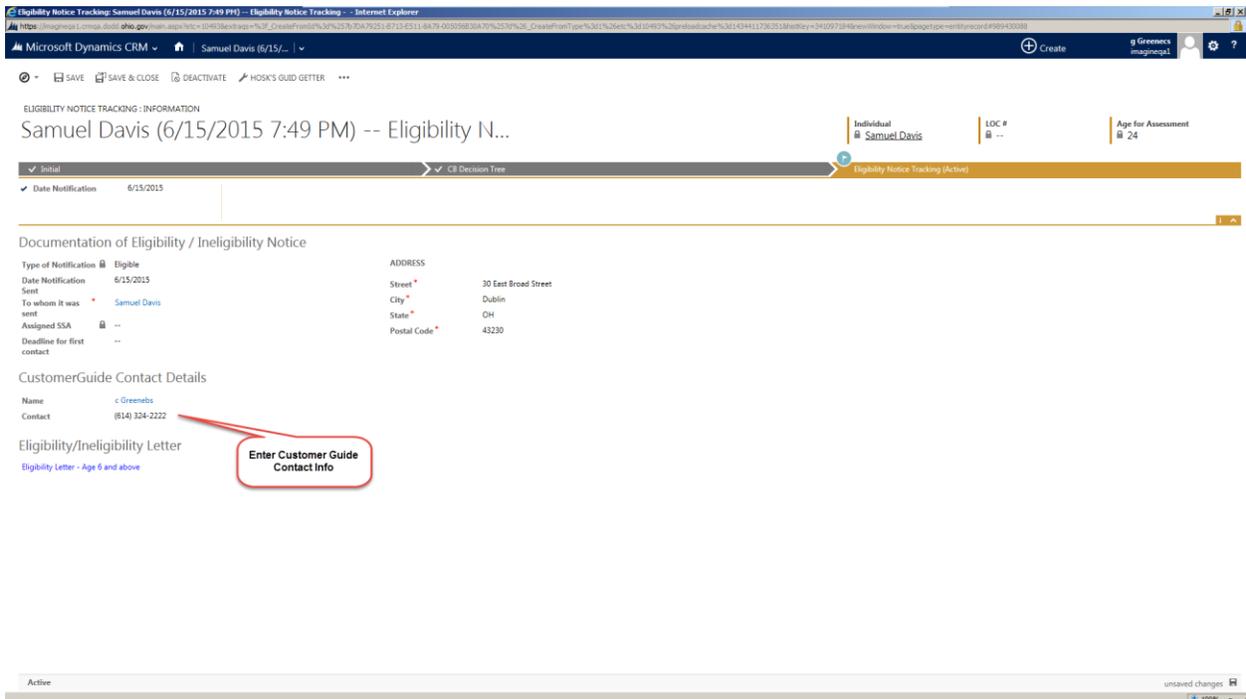
The screenshot displays the Microsoft Dynamics CRM interface for 'Eligibility Notice Tracking'. The main content area shows a form for 'Documentation of Eligibility / Ineligibility Notice' with fields for 'ADDRESS', 'Street', 'City', 'State', and 'Postal Code'. A modal dialog box titled 'Message from webpage' is open, displaying a warning icon and the message: 'There is no mailing address for the individual. Please enter the address.' with an 'OK' button. Red circles 1, 2, and 3 are overlaid on the image to highlight specific elements: 1 points to the 'To whom it was sent' field, 2 points to the 'OK' button in the modal dialog, and 3 points to the 'ADDRESS' field in the form.

2. If the person to whom the mail has to be sent does not have mailing address, system will prompt you to enter mailing address. Press OK to confirm.
3. **Enter the mailing address** for the individual. Address will be prefilled if individual have a mailing address on his profile
6. **Select a Customer Guide or Eligibility Specialist** by clicking on the magnifying glass - this will show you list of all customer guide and eligibility specialist in your county.

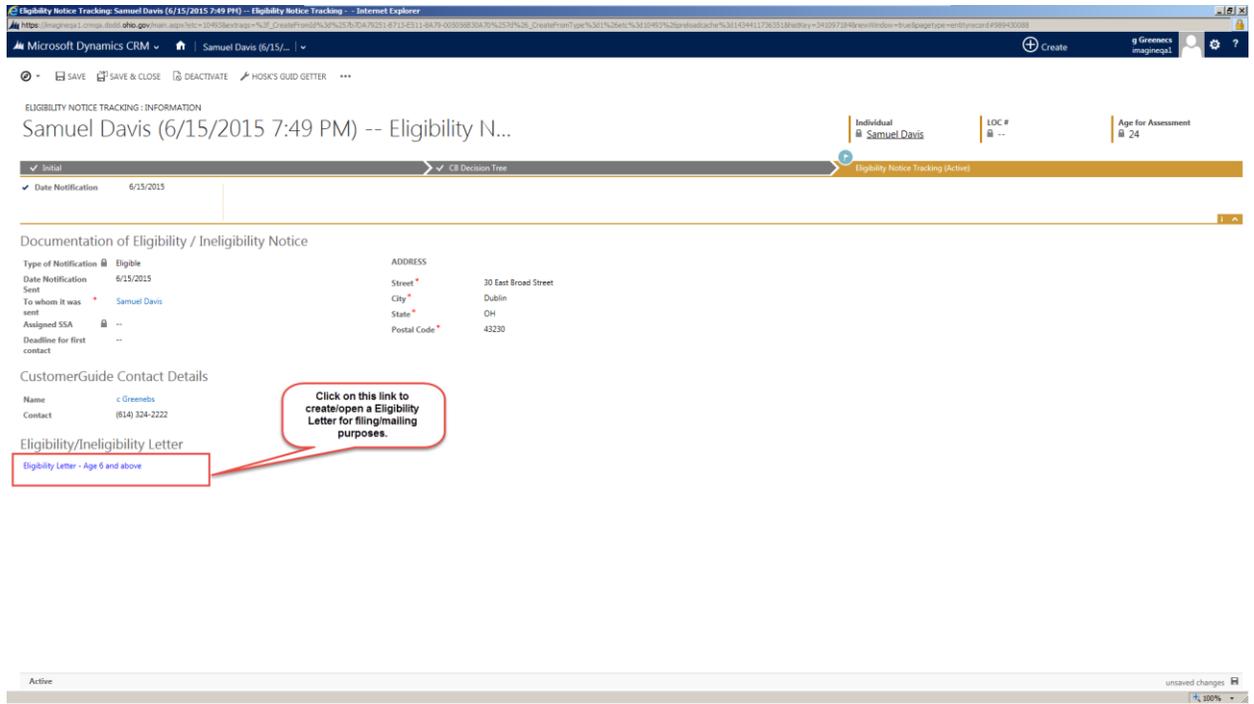




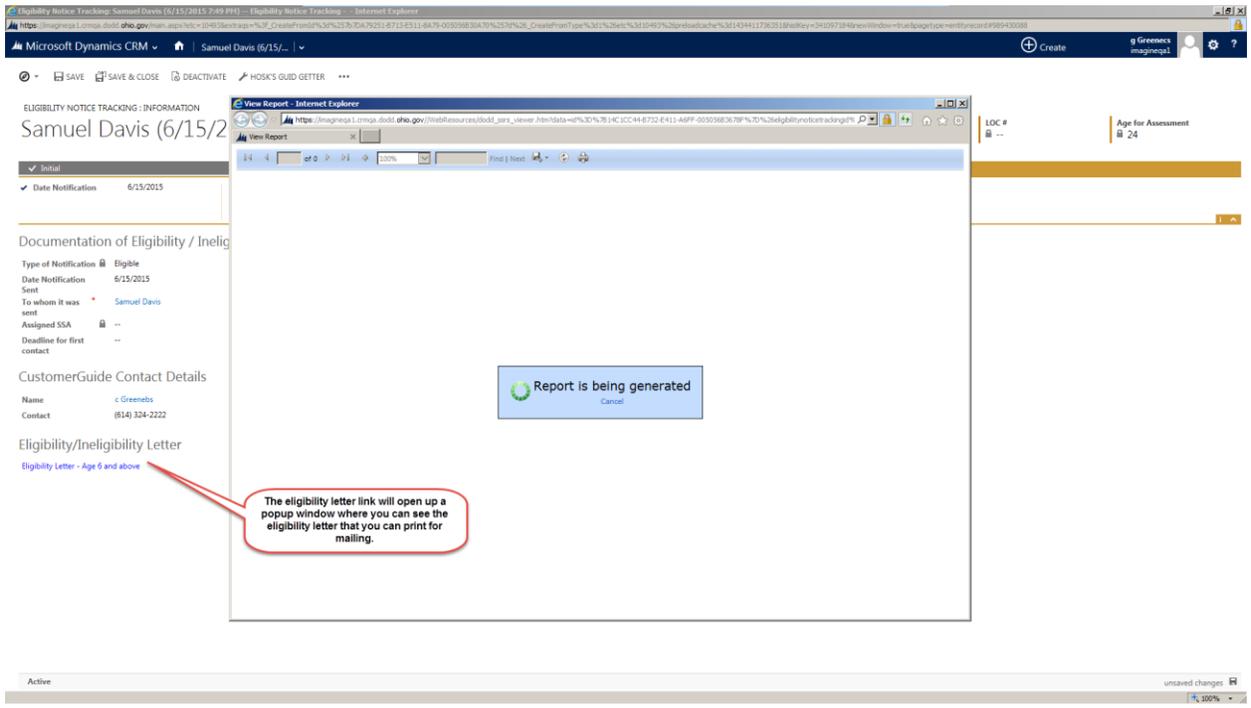
11. Enter Customer Guide’s contact information



12. Open the **Eligible/Ineligible Notice** by clicking on the link under the Eligibility/Ineligibility Letter Tab



13. **Eligible/Ineligible Notice** will open in a new tab



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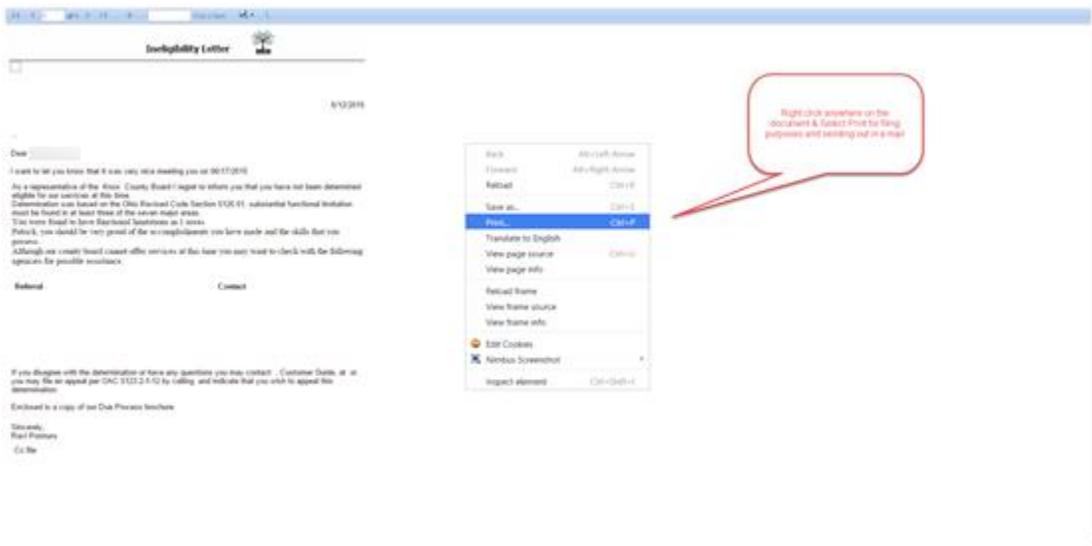
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14. Right click on your mouse and select print to **Print the Notice**



You just completed the County Board eligibility for an individual



LOC for County Board Eligibility (Applies to only 10 & above individuals)

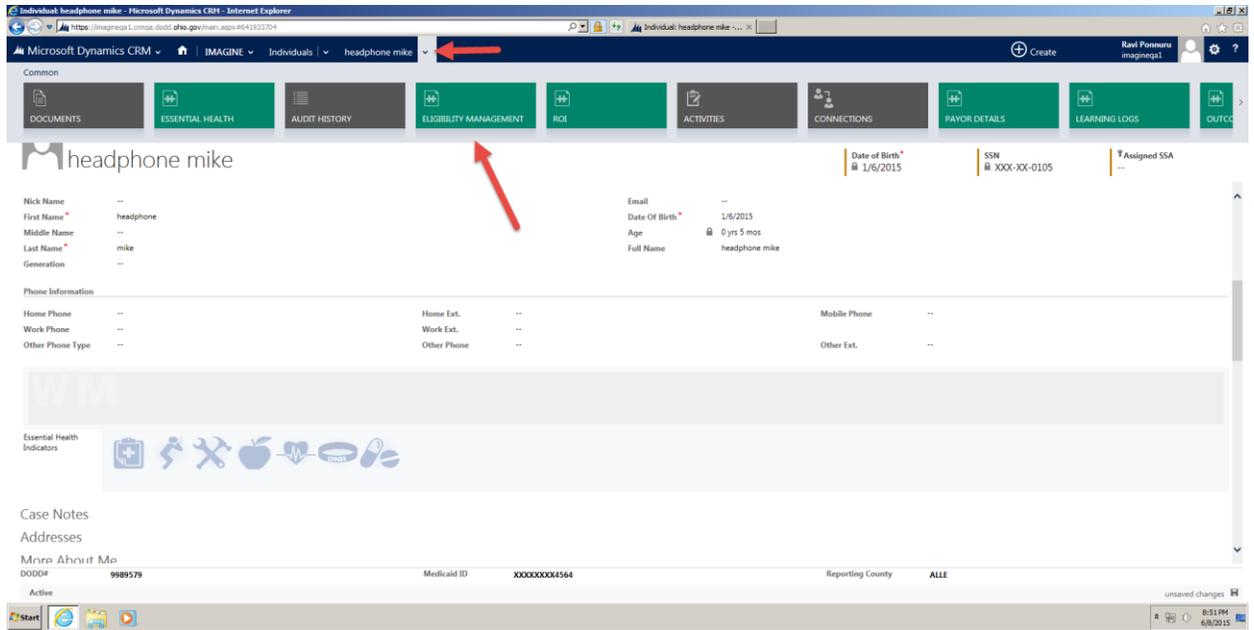
1. To start county board eligibility for an Individual, **Search for individual** by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box
3. **Individual record will show up** if individual exist in your county
4. Double click on individual record to open individual's record
5. User will land on **Individual front page**

The screenshot shows the Microsoft Dynamics CRM interface for an individual named 'headphone mike'. The page is titled 'INDIVIDUAL INFORMATION' and displays various fields for personal and contact information. At the bottom, there are sections for 'Essential Health Indicators', 'Case Notes', and 'Addresses'. The 'Addresses' section shows a single address for 'More About Me' with a DODD# of 9989579, Medicaid ID of XXXXXXXX4564, and Reporting County of ALE. The status is 'Active'.

INDIVIDUAL INFORMATION		Date of Birth*	SSN	Assigned SSA
headphone mike		1/6/2015	XXX-XX-0105	--
Nick Name	--	Email		
First Name*	headphone	Date Of Birth*		
Middle Name	--	1/6/2015		
Last Name*	mike	Age		
Generation	--	0 yrs 5 mos		
Phone Information		Full Name		
Home Phone	--	headphone mike		
Work Phone	--	Home Ext.		
Other Phone Type	--	Work Ext.		
	--	Other Phone		
	--	Mobile Phone		
	--	Other Ext.		
Essential Health Indicators				
Case Notes				
Addresses				
More About Me				
DODD#	9989579	Medicaid ID	XXXXXXXX4564	Reporting County
				ALE
Active				

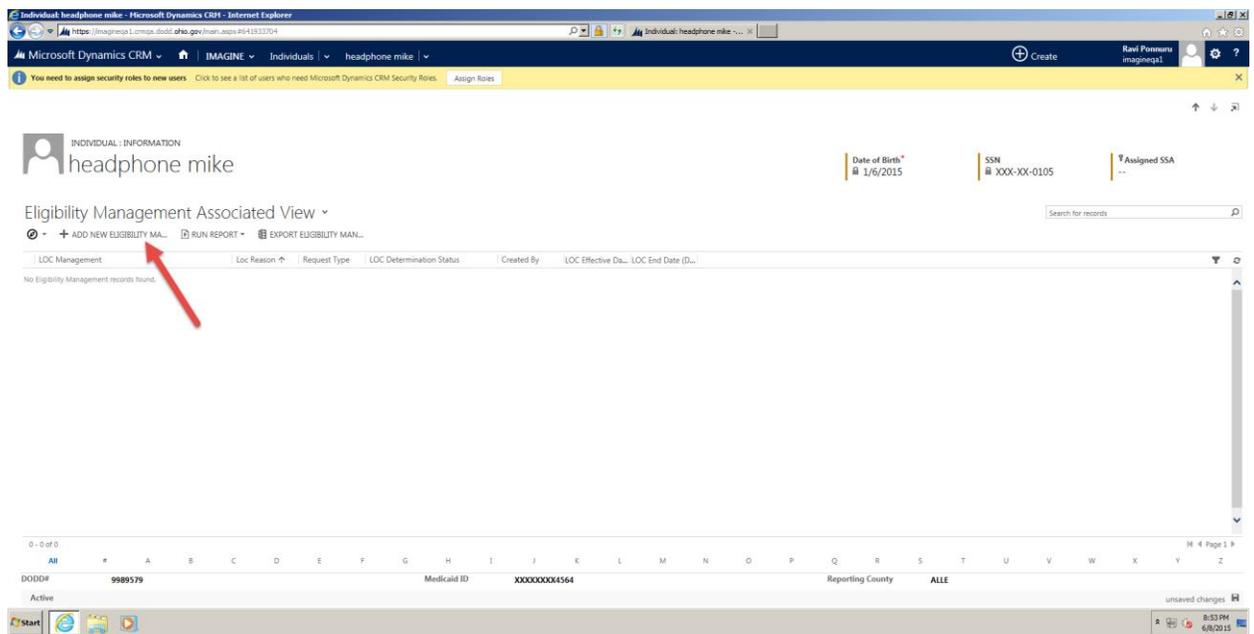
6. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name





7. User will land on **Eligibility Management View Page**—you can see all the eligibilities done for that individual

8. **Add New Eligibility Management**



9. Enter required information on **Initial stage** to Save Eligibility management

1. **Assessment Reason** = select County Board Eligibility



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2. **Assessment Type** = Initial
3. **Assessment Date** = can be today's or past date – it's when you got this information from individual
4. **Date of Visit** = can be today's or past date – it's when you met with individual to capture this information
5. **Assign Eligibility Specialist** = click on the magnifying glass and select the eligibility specialist who will work with the individual
6. Click on Save button

10. Cannot Move to **LOC** stage (has to be an evaluator)



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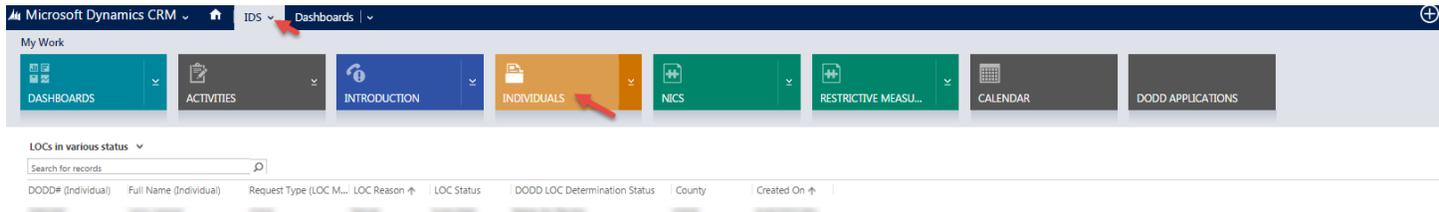
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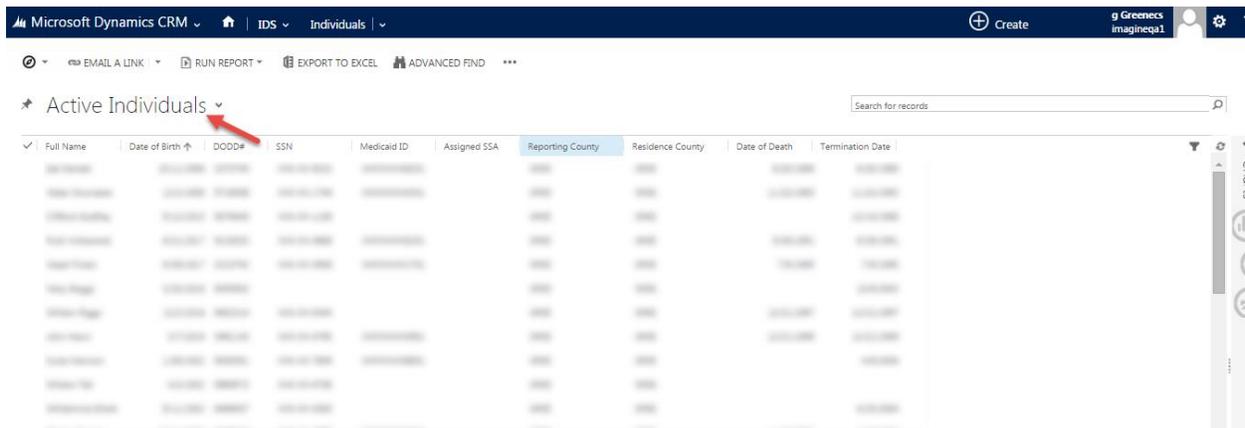


LOC for Waiver Eligibility

25. To access list of individuals in your county → Select **Individual Tile** from dropdown arrow next to IDS/iMAGINE



26. You will see list of **Active Individuals in your county**



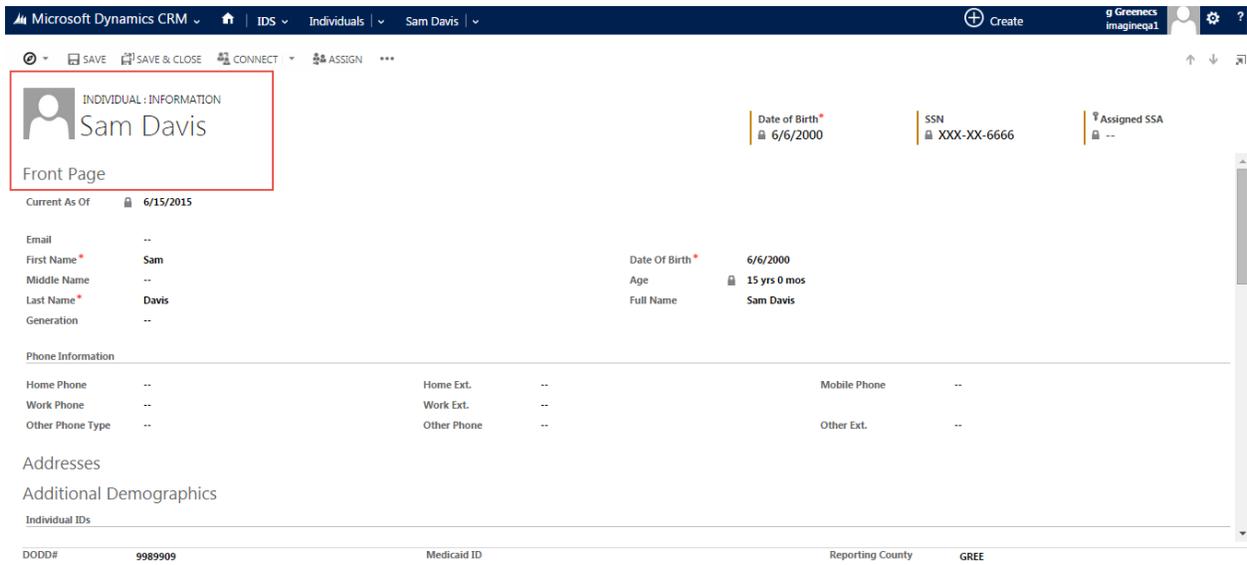
27. **Search for individual** by typing name in search box
 28. Hit **Enter** or click on the magnifying glass next to search box
 29. **Individual record will show up** if individual exist in your county



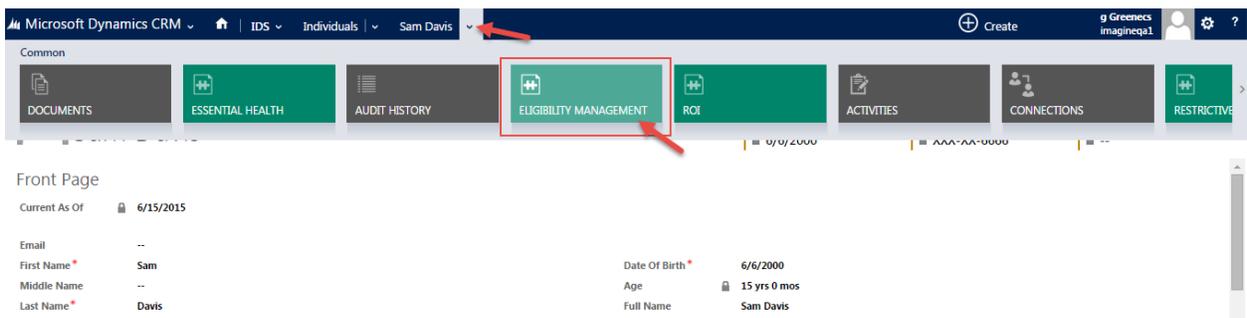


30. Double click on individual record to open individual's record

31. User will land on **Individual front page**



32. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual's name

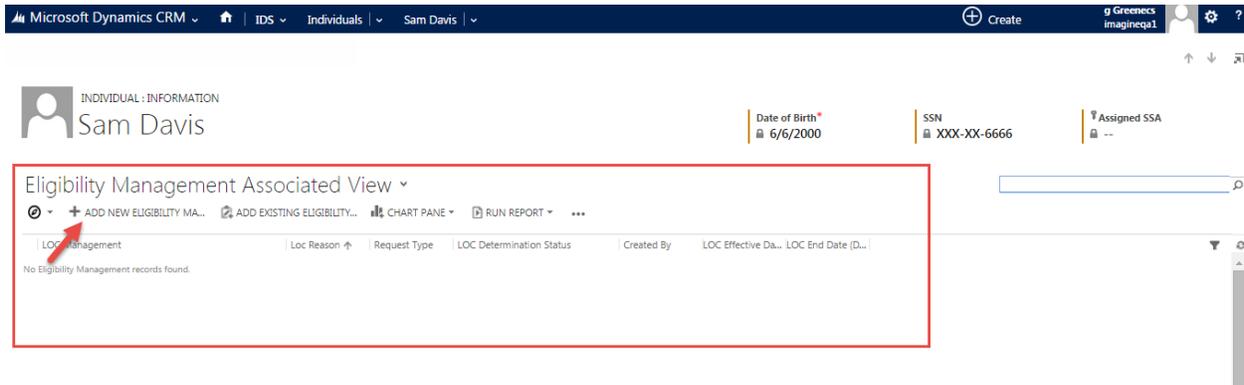


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33. User will land on **Eligibility Management View Page**— you can see all the eligibilities done for that individual

34. Add New Eligibility Management



35. Enter required information on **Initial stage** to Save Eligibility management

1. **Assessment Reason** = select Waiver
2. **Request Type** = Initial
3. **Assigned Evaluator** = click on the magnifying and select the evaluator who will complete the LOC for this individual. You can assign yourself if you will do it
4. **Assessment Date** = can be today's or past date – it's the date when you got this information from individual
5. **Waiver Type** – select the type of waiver you are applying for



Microsoft Dynamics CRM | Eligibility Managem... | Create | g Greenecs imagineq1

SAVE SAVE & CLOSE + NEW DEACTIVATE

ELIGIBILITY MANAGEMENT : INFORMATION

Eligibility Management -- (Sam Davis) ...

Request Type: Initial | LOC Reason: Waiver | DODD#: 9989909

Initial (Active) | LOC | DODD LOC Determination Packet | Next Stage

Eligibility Info	No	Primary Verification	No
GTKYV Scheduled	No		
GTKYV Information	No		

Eligibility Info

Assessment Reason	Waiver 1	Assigned Eligibility Specialist	--	INDIVIDUAL DETAILS
Request Type	Initial 2	Waiver Type	IO 5	Full Name: Sam Davis
Assigned Evaluator	g Greenecs 3	Best way to communicate(Preferred Method)	--	DODD#: 9989909
Assessment Date (Scheduled/Rescheduled)	6/10/2015 4	Age for Assessment	15	Date of Birth: 6/6/2000
LOC Status	Not Started	Proposed Effective Date	--	Age: 15 yrs 0 mos
Location for Initial Visit	--	LOC Effective Start Date	--	Email: --
Location Address	<input type="text"/>	LOC Effective End Date	--	Reporting County: GREE
Date of Visit	--			Telephone: --
				Waiver County: --
				Waiver Start Date: --
				Waiver End Date: --
				Individual Waiver Type: --

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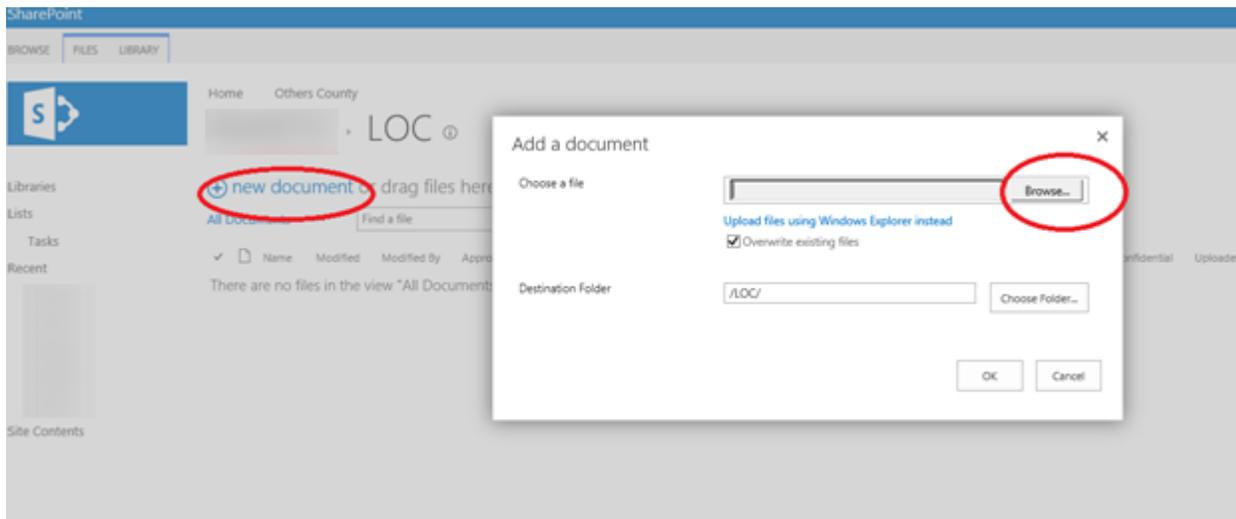
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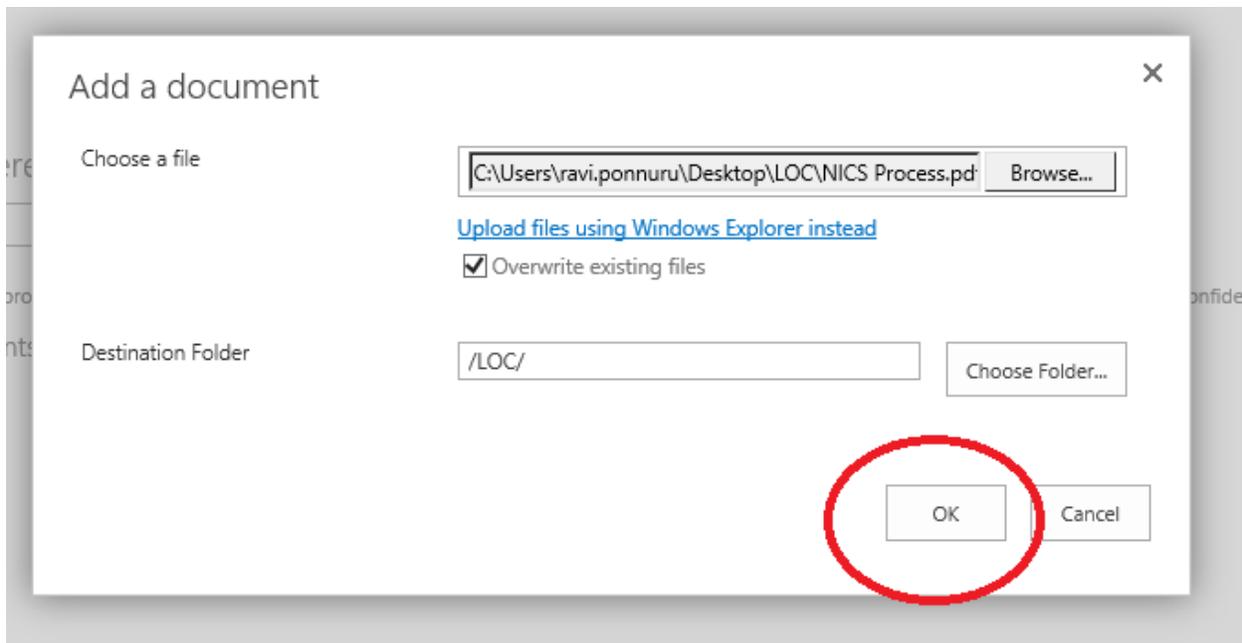
36. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document to SharePoint**

10. Click on **+new document**
11. Click on **chose file**



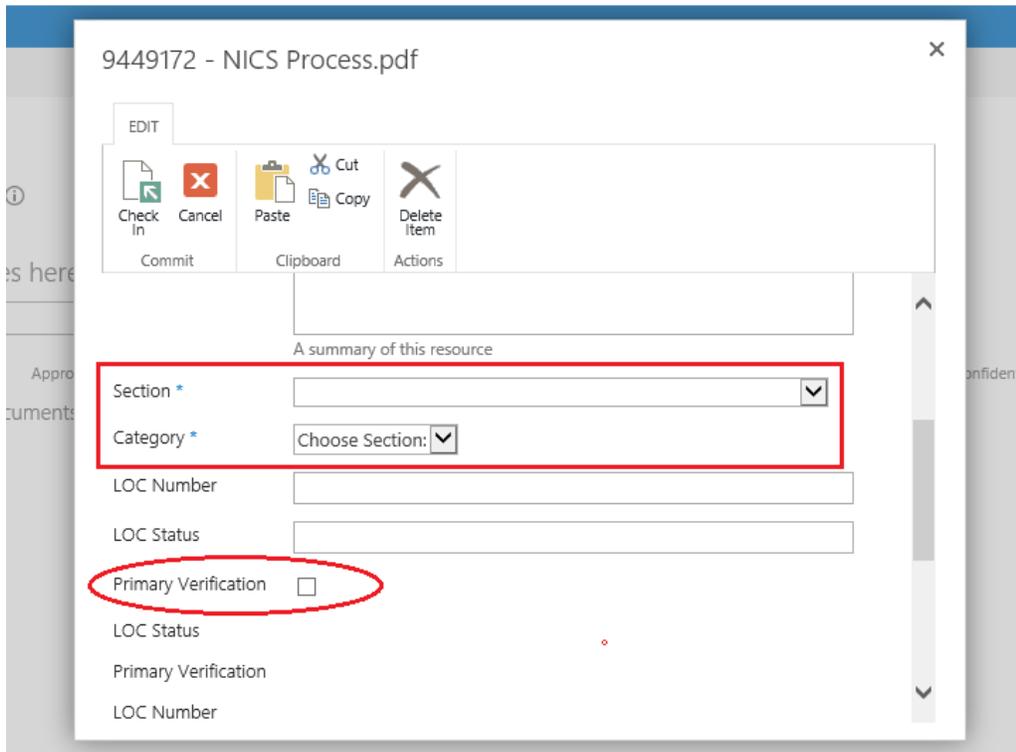
12. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on “Open” once done selecting
13. You will be back on previous screen → **Click on OK**



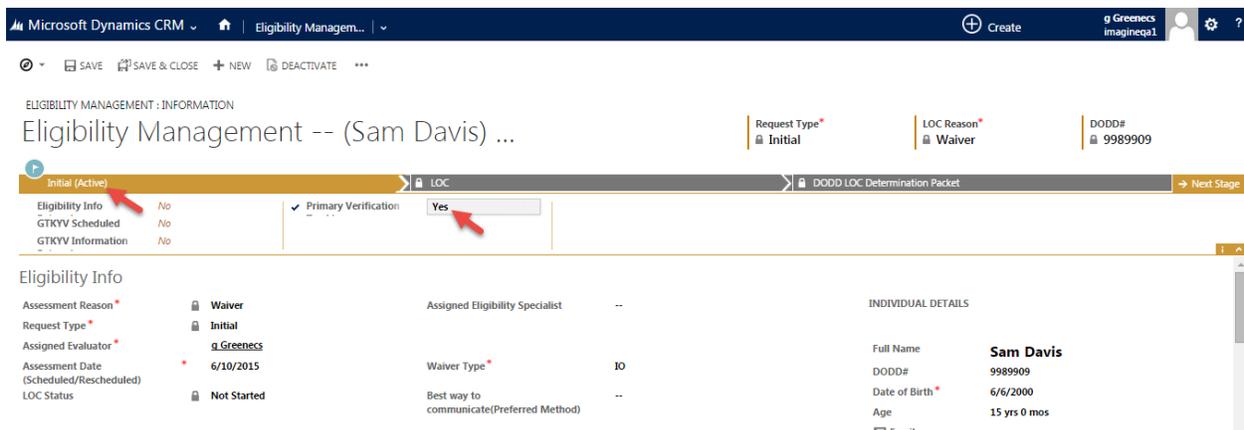


14. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
15. **Add Section →** Select “**LOC**” from the option set
16. **Add Category →** Select the reason for what you are uploading the document → in this case it should = **LOC –Waiver**
17. **Check Primary Verification** if this is a Primary Verification document
18. Click **OK** – User will be back on Initial Stage

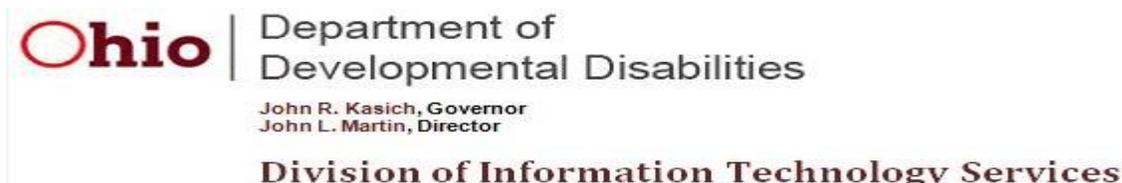




37. On top of Initial Stage → Check **Primary Verification** as **YES** – This is a manual check for the user to confirm that user has uploaded the primary verification document to support this LOC



38. **Cannot Move to LOC stage** (has to be an evaluator)



3. Service Support Administrator – SSA (IDS Read)

Login

1. **Open Your Browser** (internet explorer or chrome)
2. Click on login from DODD Home Page

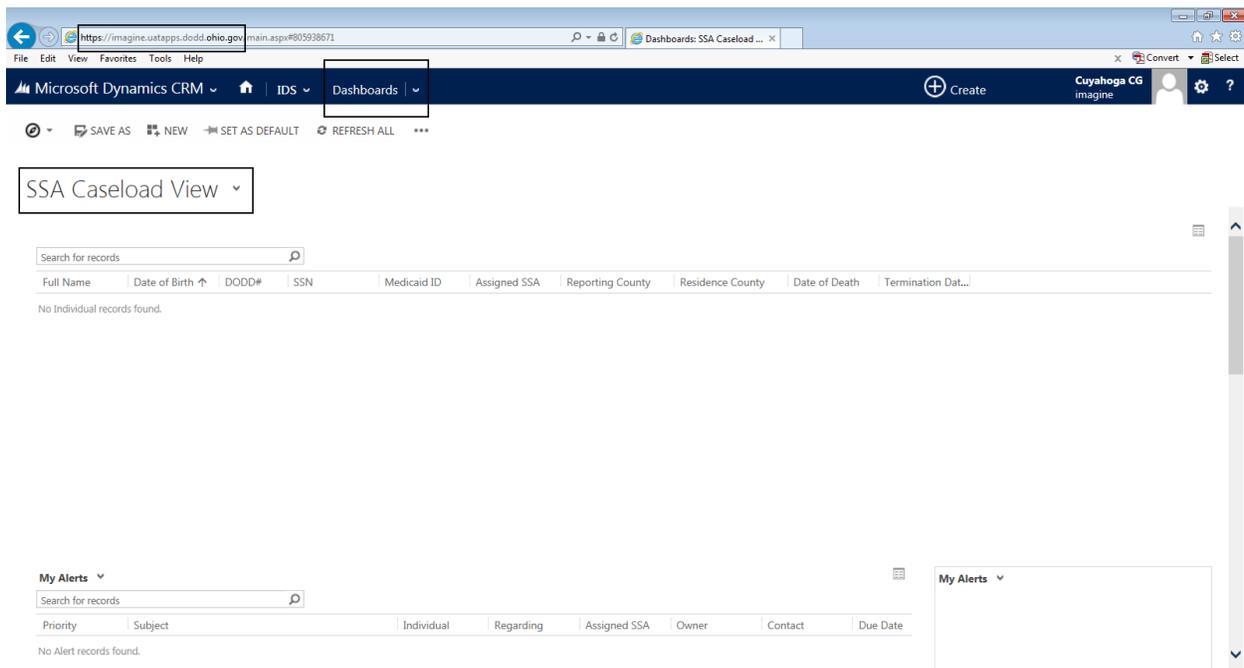


3. Enter your **User Name** and **Password**
(Role: SSA)

 A screenshot of a login form. At the top is the Ohio Department of Developmental Disabilities logo. Below it is the text '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 the warning is the instruction 'Type your user name and password.' There are two input fields: 'User name' containing 'cgc' and 'Password' containing masked characters. A 'Sign In' button is located below the password field. At the bottom left is a link 'Back to Portal' and at the bottom right is a link 'Forgot Password'.


Dashboard

4. Once the user has logged in they will be taken to the **SSA Dashboard**

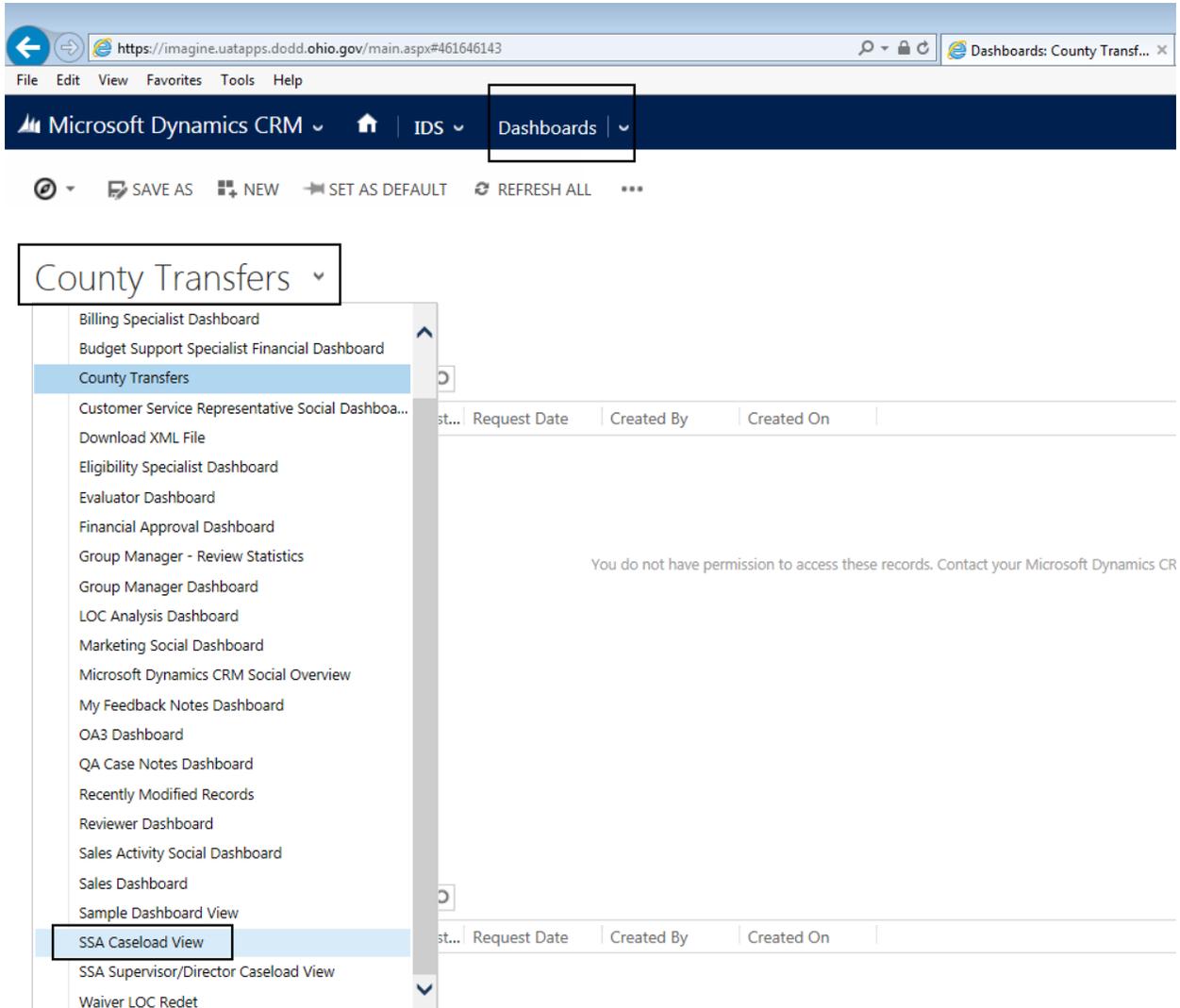


5. If you don't see the SSA Caseload View:

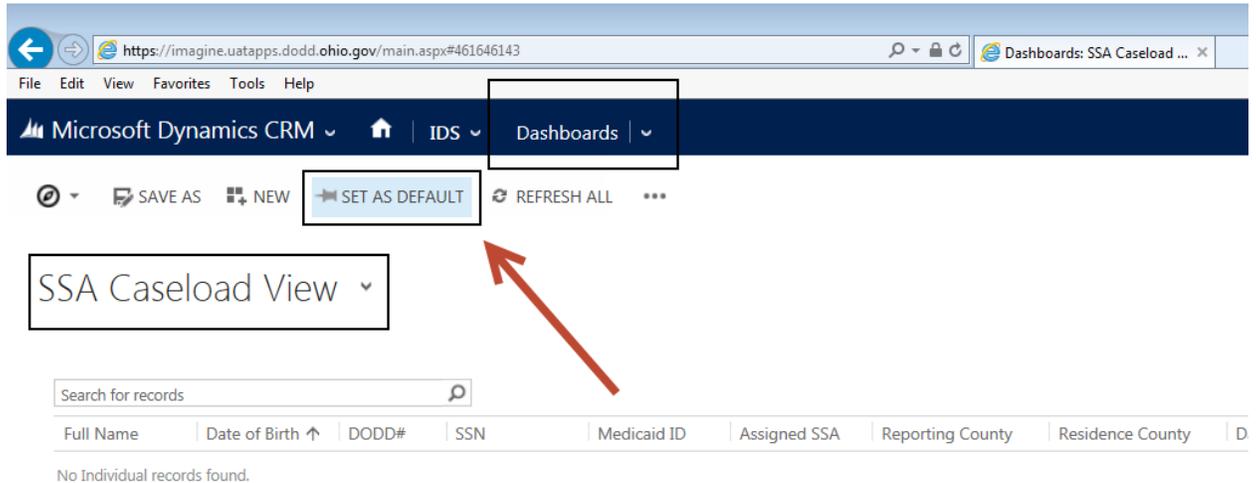
1. Click on the dropdown arrow next to the currently selected view.
2. Click on the view associated with the role you would like to open (ex. SSA Caseload view).



3. Once selected from the view selector dropdown the SSA Caseload View will be visible.



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

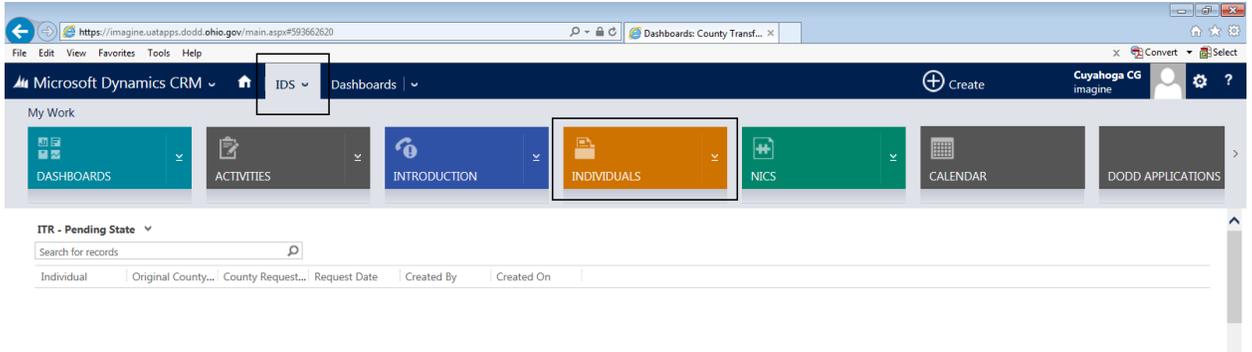


Access Individual

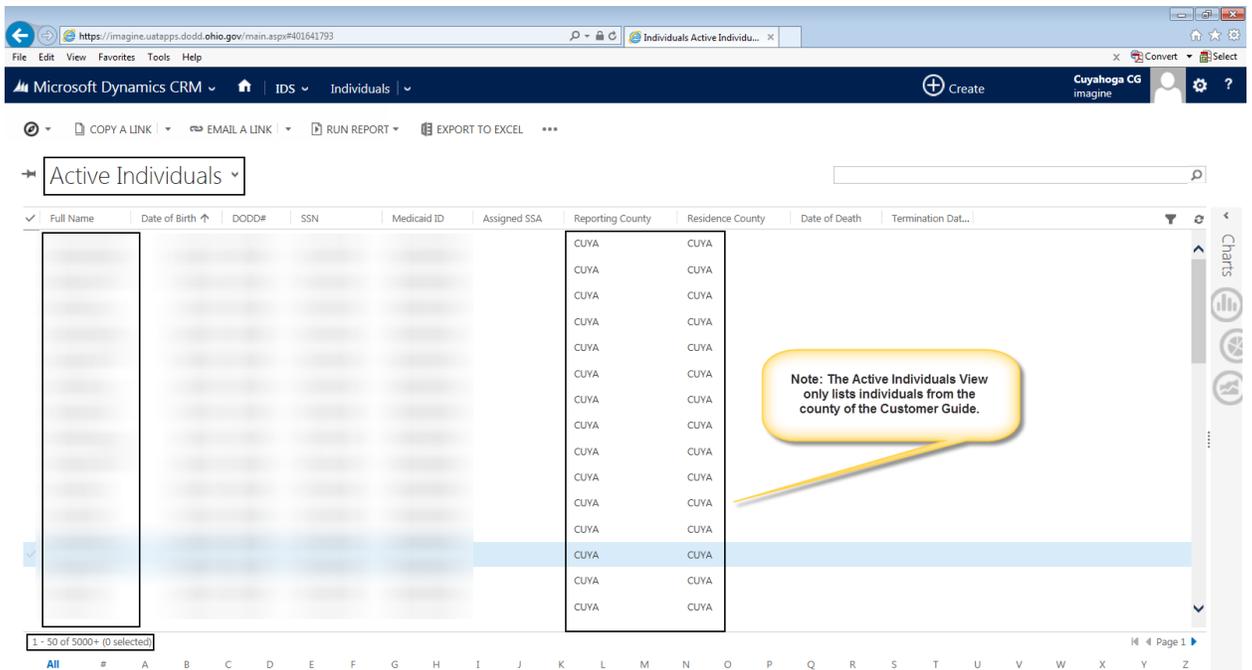
6. To access list of individuals in your county:

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





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



The screenshot shows a web browser window displaying the Microsoft Dynamics CRM interface. The browser address bar shows a URL from 'https://imagine.uetapps.dodd.ohio.gov/main.aspx#401641793'. The CRM navigation bar includes 'Microsoft Dynamics CRM', 'IDS', and 'Individuals'. A search bar at the top right contains the text 'Cuyahoga CG imagine'. Below the navigation bar, there are action buttons: 'COPY A LINK', 'EMAIL A LINK', 'RUN REPORT', and 'EXPORT TO EXCEL'. The main content area is titled 'Search Results' and displays a table with the following columns: Full Name, Date of Birth, DODD#, SSN, Medicaid ID, Assigned SSA, Reporting County, Residence County, and Funding. The table contains two rows of data, both with 'CUYA' in the Reporting County and 'ASHT' in the Residence County. A yellow callout box with a pointer to the table contains the text: 'Note: The Search Results View searches individuals across all counties.' On the right side of the table, there is a 'Charts' sidebar with icons for bar, line, and pie charts.



Department of
Developmental Disabilities

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Division of Information Technology Services

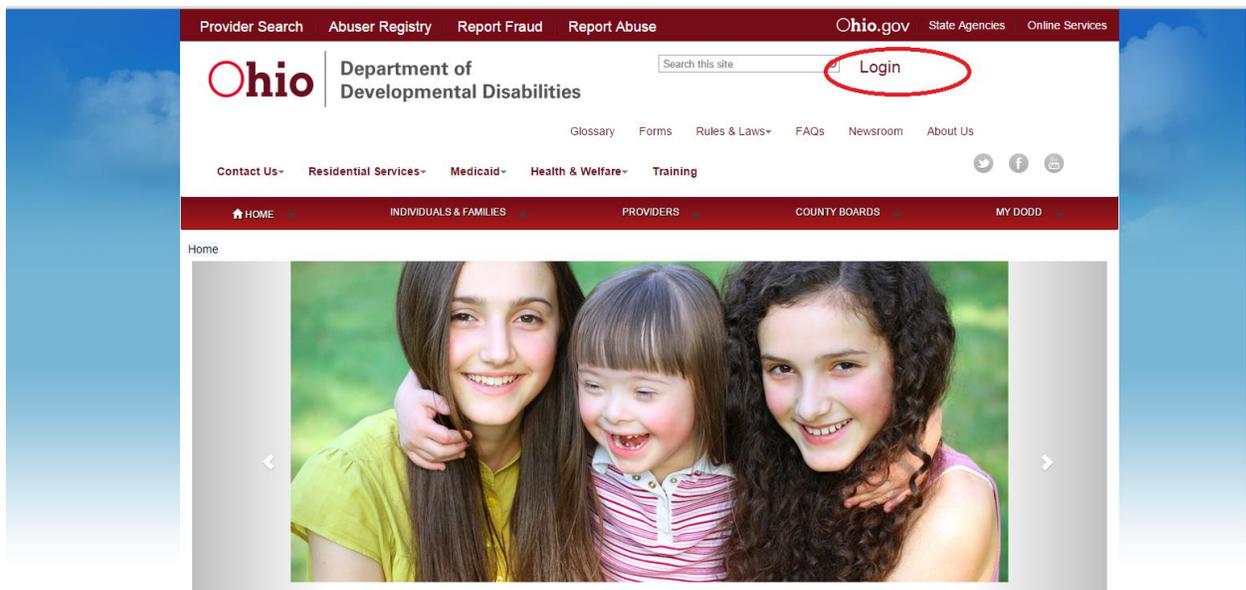


4. County Board Evaluator

Note: This role is assigned in addition to any CRM access roles, once the LOC evaluator certification is achieved.

Login

1. **Open Your Browser** (internet explorer or chrome)
2. Click on login from DODD Home Page



3. **Enter your User Name and Password**
(Role: CB Evaluator)

Ohio Department of Developmental Disabilities

Login for County Boards, Providers, and DODD Central Office

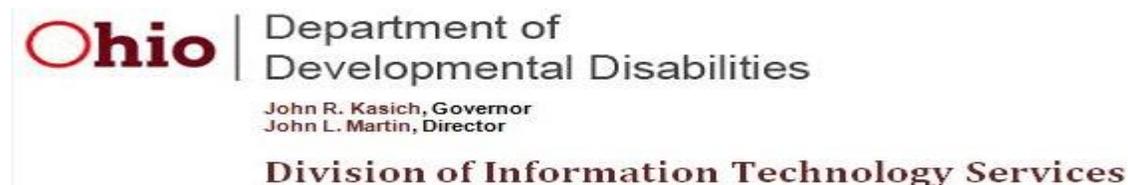
Please do not bookmark this page or add this page to your favorites. This page will not work as a bookmark or a favorite.

Type your user name and password.

User name:

Password:

[Back to Portal](#) [Forgot Password](#)



Dashboard

4. Once the user has logged in they will be taken to the Evaluator Dashboard

The screenshot shows the 'Evaluator Dashboard' in Microsoft Dynamics CRM. It features several data views:

- LOCs in various status:** A table with columns: DODD# (Individual), Full Name (Individual), Request Type (LOC M...), LOC Reason, LOC Status, DODD LOC Determination Status, County, and Created On. An annotation points to this table: "Will see Completed, Submitted and other LOCs here".
- Incomplete LOCs:** A table with columns: Individual, Created On, LOC Type, LOC Status, DODD LOC Determination Status, and Status. An annotation points to this table: "Will see LOCs that need Incomplete plate by DODD RPS2 here".
- LOC Date Change/Redetermination Req...:** A table with columns: DODD#, First Name, Last Name, Request Type, Reporting County, Type, Date Change Status, Created By, and Created On. An annotation points to this table: "Will see submitted Date Change and Redets here".
- LOC Pending Redetermination due (Pending Sub...:** A table with columns: First Name, Last Name, DODD#, Individual Waiver Type, Waiver End Date, LOC Redetermination Dat..., and Reporting Cour... An annotation points to this table: "Will see Redets due here".
- My Alerts:** A table with columns: Priority, Subject, Individual, Regarding, Assigned SSA, Owner, and Contact. It displays three alerts related to "Denial of Reporting County Transfer Request".
- My Notifications:** A table with columns: Priority, Subject, Regarding, Individual, Assigned SSA, Contact, and Date Cre... It currently shows "No Notification records found".



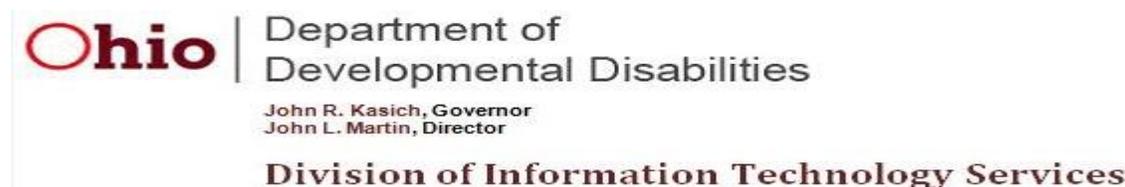
5. If you don't see Evaluator Dashboard, follow these steps:

1. Click on the dropdown arrow next to the currently selected view.
2. Click on the view associated with the role you would like to open (ex. Evaluator Dashboard).
3. Once selected from the view selector dropdown the Evaluator Dashboard will be visible.
4. Finally, click on **“Set as Default”** on top of this dashboard page if you wish to pin this as your **Home** landing page.

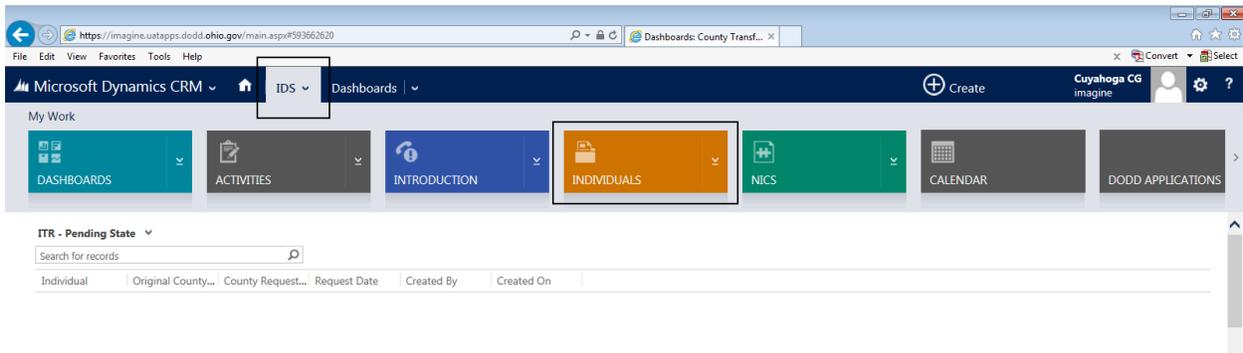
Note: If you have multiple roles, you might see the dashboard for any of those roles when you login (for eg: if you are a SSA and also have an Evaluator role – you can select either one of those dashboards as your default dashboard by clicking on **“Set as Default”** button.

Access Individual

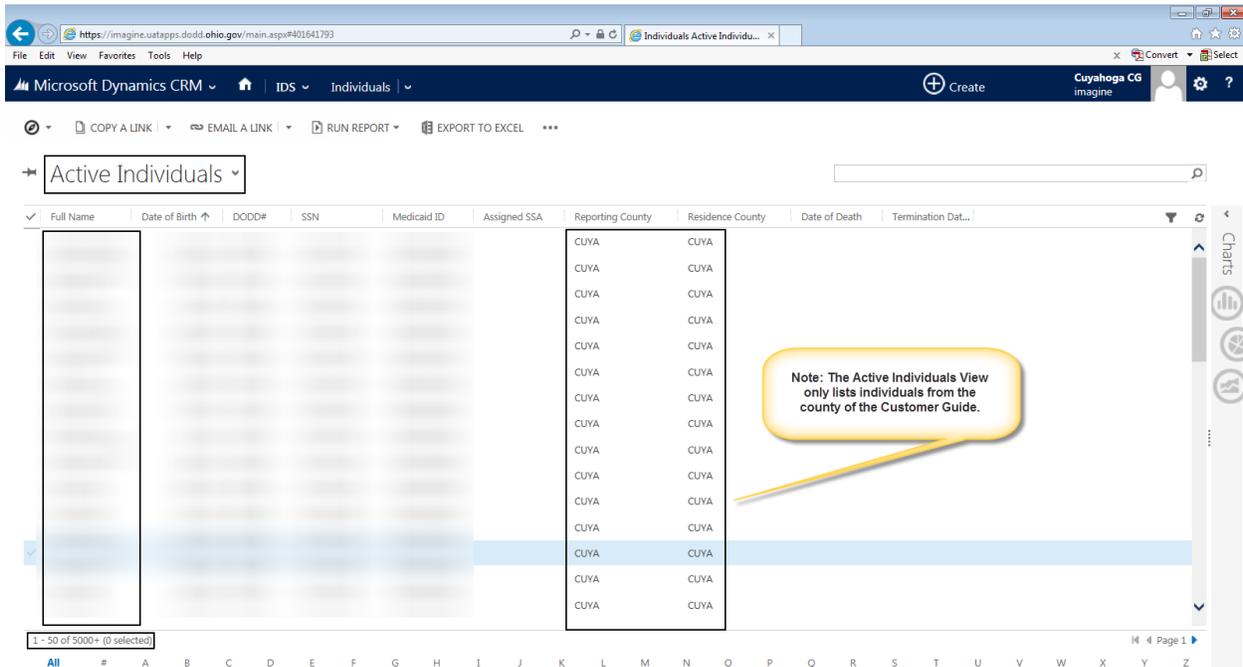
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The screenshot shows a web browser window displaying the Microsoft Dynamics CRM interface. The browser address bar shows a URL starting with 'https://imagine.uetapps.dodd.ohio.gov/main.aspx#401641793'. The CRM navigation bar includes 'Microsoft Dynamics CRM', 'IDS', and 'Individuals'. A search bar at the top right contains the text 'Cuyahoga CG imagine'. Below the navigation bar, there are options for 'COPY A LINK', 'EMAIL A LINK', 'RUN REPORT', and 'EXPORT TO EXCEL'. The main content area is titled 'Search Results' and displays a table with the following columns: Full Name, Date of Birth, DODD#, SSN, Medicaid ID, Assigned SSA, Reporting County, Residence County, and Funding. The table contains two rows of data, both with 'CUYA' in the Reporting County and 'ASHT' in the Residence County. A yellow callout box with a pointer to the table contains the text: 'Note: The Search Results View searches individuals across all counties.' On the right side of the table, there is a vertical 'Charts' menu with icons for a bar chart and a pie chart.



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Decision Tree for County Board Eligibility

1. To start county board eligibility for an Individual, Search for individual by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box.
3. **Individual record will show up** if individual exist in your county

The screenshot displays the Microsoft Dynamics CRM interface. At the top, the browser address bar shows the URL: <https://magneta1.ornpa.dodol.ohio.gov/frames.aspx#959531394>. The CRM navigation bar includes 'Microsoft Dynamics CRM', 'IDS', and 'Individuals'. A search box at the top right contains the text 'Samuel Davis'. Below the search bar, a table displays search results. The table has columns for 'Full Name', 'Date of Birth', 'DODOL', 'SSN', 'Medicaid ID', 'Assigned SSA', 'Reporting County', 'Residence County', and 'Funding Type'. One result is shown for 'Samuel Davis' with a date of birth of 10/10/1990, SSN 998911, and assigned SSA XXX-XX-32-. The reporting and residence counties are both 'GREE'. The table is highlighted with a red border. The bottom of the screen shows the Windows taskbar with the Start button, system tray icons, and the date/time '7:38 PM 6/15/2015'.

Full Name	Date of Birth	DODOL	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County	Funding Type
Samuel Davis	10/10/1990	998911	XXX-XX-32-			GREE	GREE	



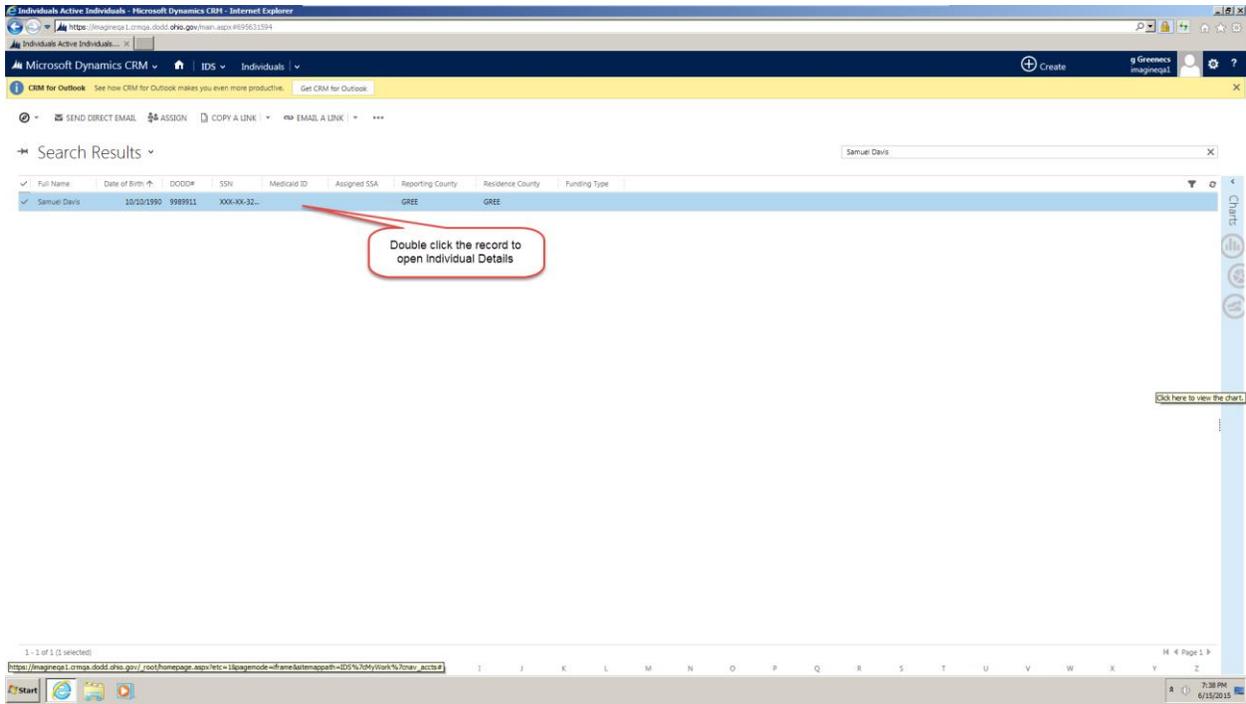
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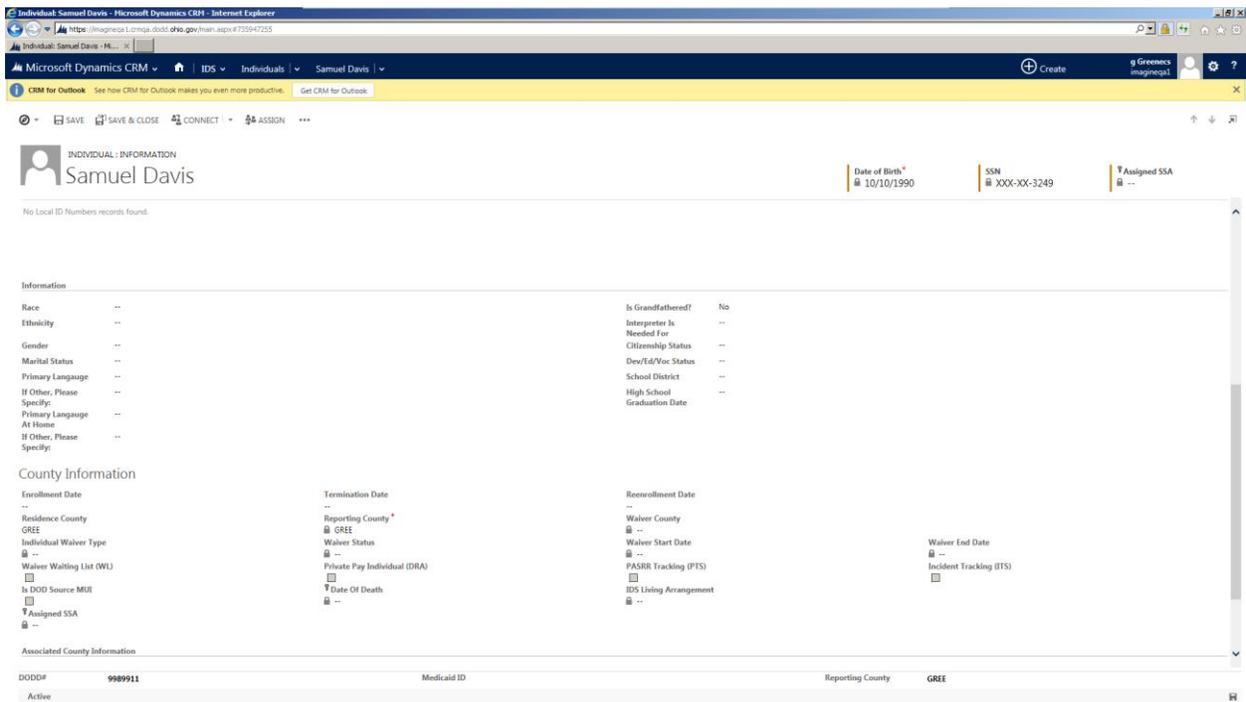
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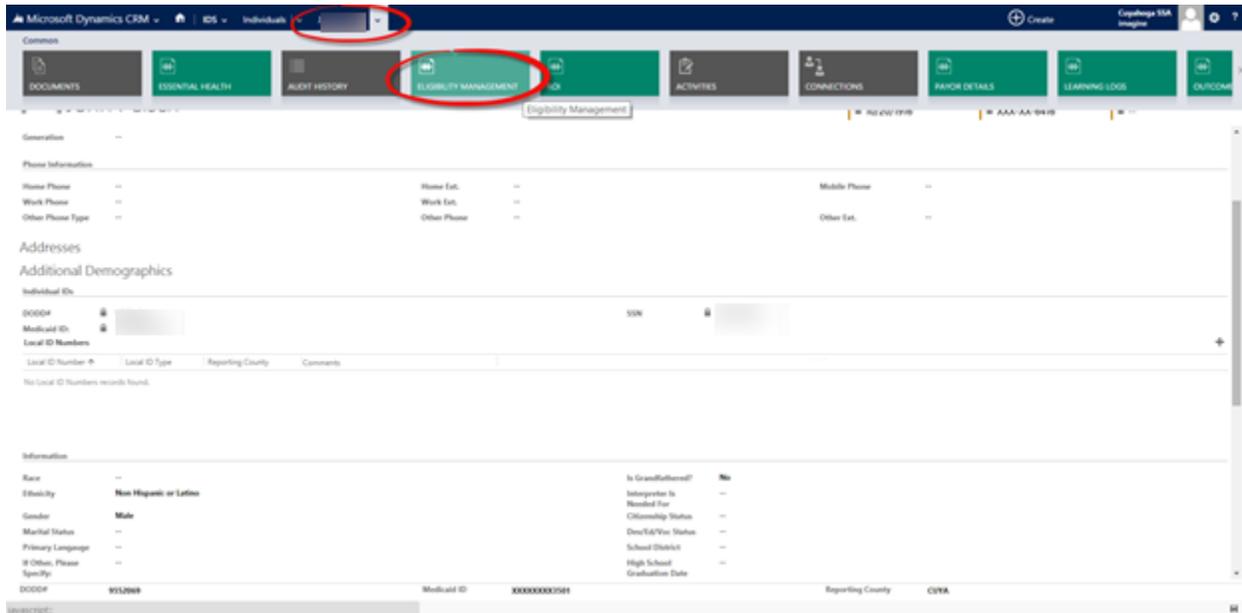
4. Double click on individual record to open individual's record



5. User will land on Individual front page.



6. Start Eligibility Process - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



7. User will land on **Eligibility Management View Page**—you can see all the eligibilities done for that individual.

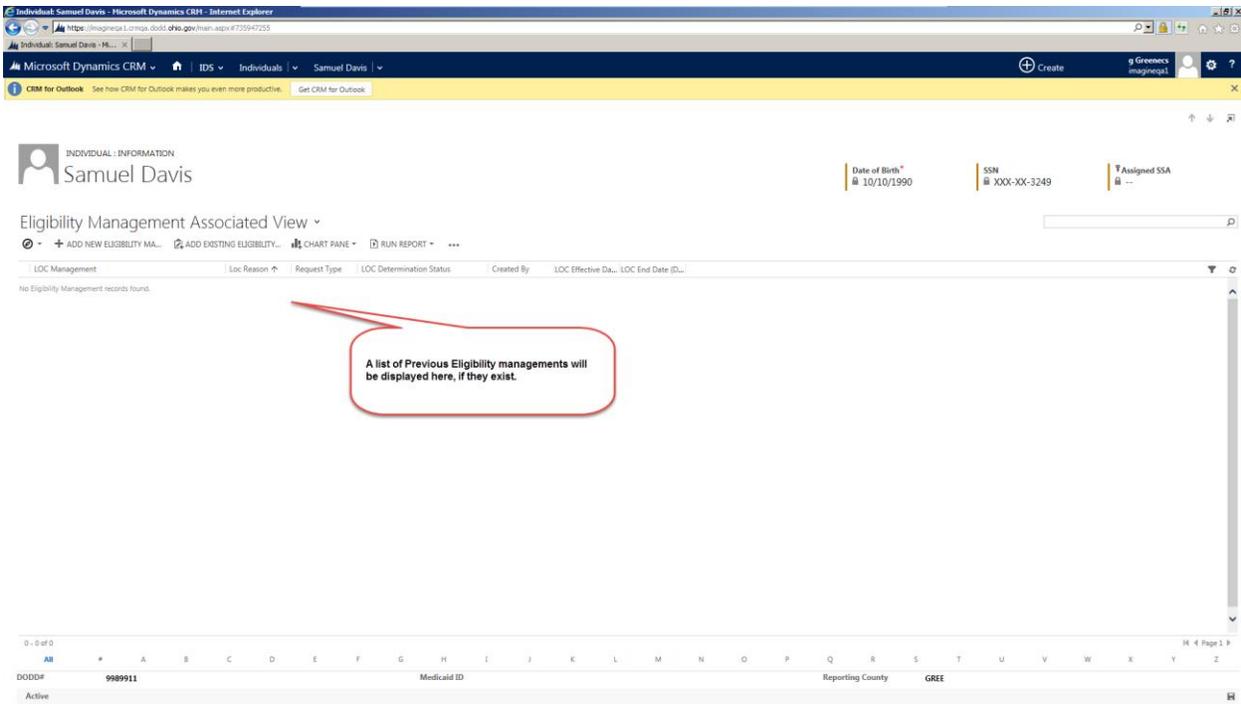


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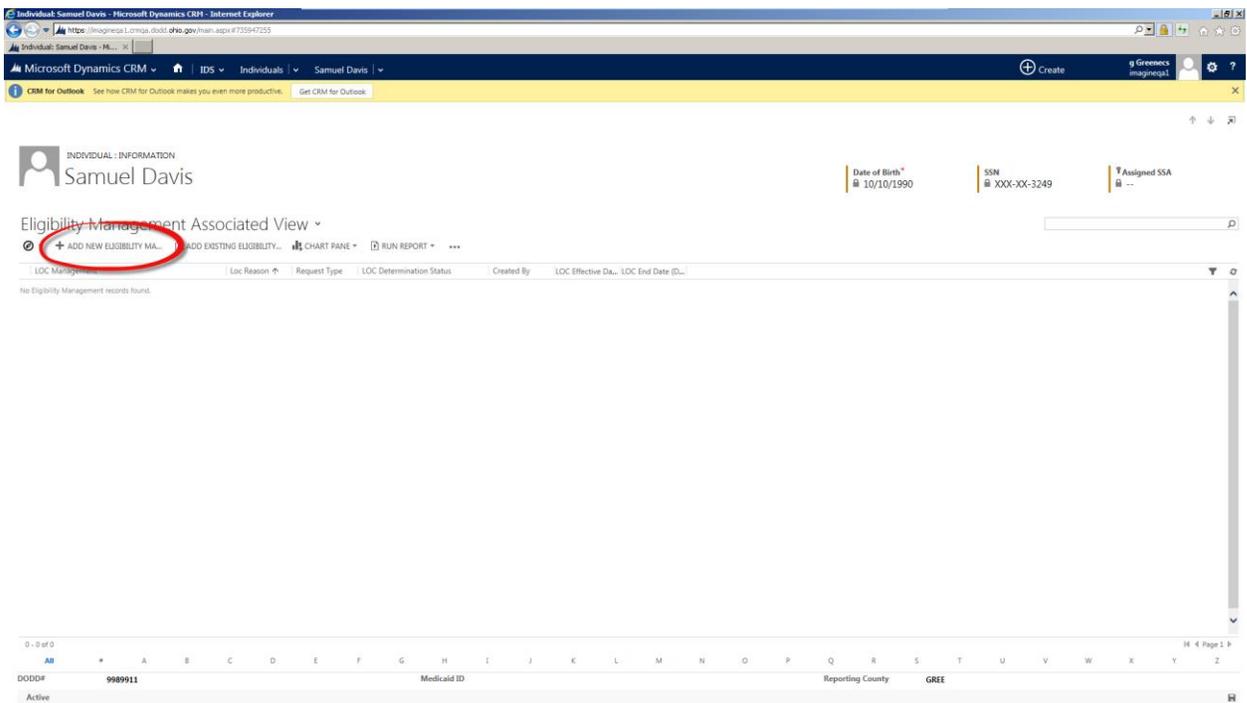
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8. Add New Eligibility Management



9. Enter required information on **Initial stage** to Save Eligibility management



1. **Assessment Reason** = select County Board Eligibility
2. **Assessment Type** = Initial
3. **Assessment Date** = can be today's or past date – it's when you are got this information from individual
4. **Assign Eligibility Specialist** = click on the magnifying glass and select the eligibility specialist who will work with the individual
5. **Date of Visit** = can be today's or past date – it's when you met with individual to capture this information

Click on Save button.

Microsoft Dynamics CRM - Internet Explorer

SAVE & CLOSE NEW HOSKIS GUID GETTER

ELIGIBILITY MANAGEMENT : INFORMATION
New Eligibility Management

Request Type* Initial LOC Reason* County Board Eligibility DODD# 9989911

Initial (Active) LOC DODD# LOC Determination Packet Next Stage

Eligibility Info

Assessment Reason* County Board Eligibility 1
Request Type* Initial 2
Assessment Date (Scheduled/Rescheduled) 6/1/2015 3
LOC Status Not Started

Assigned Eligibility Specialist* 4
Eligibility Specialist
Look Up More Records
1 result

Best way to communicate (Preferred Method)
Age for Assessment --
County Proposed Effective Date --
LOC Effective End Date --

Individual DETAILS
Full Name Samuel Davis
DODD# 9989911
Date of Birth* 10/10/1990
Age 24 yrs
EID Email --
Supporting County* GREE
Telephone --
Waiver County --
Waiver Start Date --
Waiver End Date --
Individual Waiver Type --
New Facility Admission Date --
Previous Facility Discharge Date --

Location for Initial Visit --
Location Address --
Date of Visit* 6/1/2015 5
LOC Effective Start Date --

Verification Tracking
LOC
LOC Date Change / Redet
LOC Date Change Requests

Name	Created On	DODD#	Email	First Name	Last Name	Reporting Count...	LOC Autonumber...	Type
To enable this content, create the record.								

Owner: Greene Ownership Team
Active



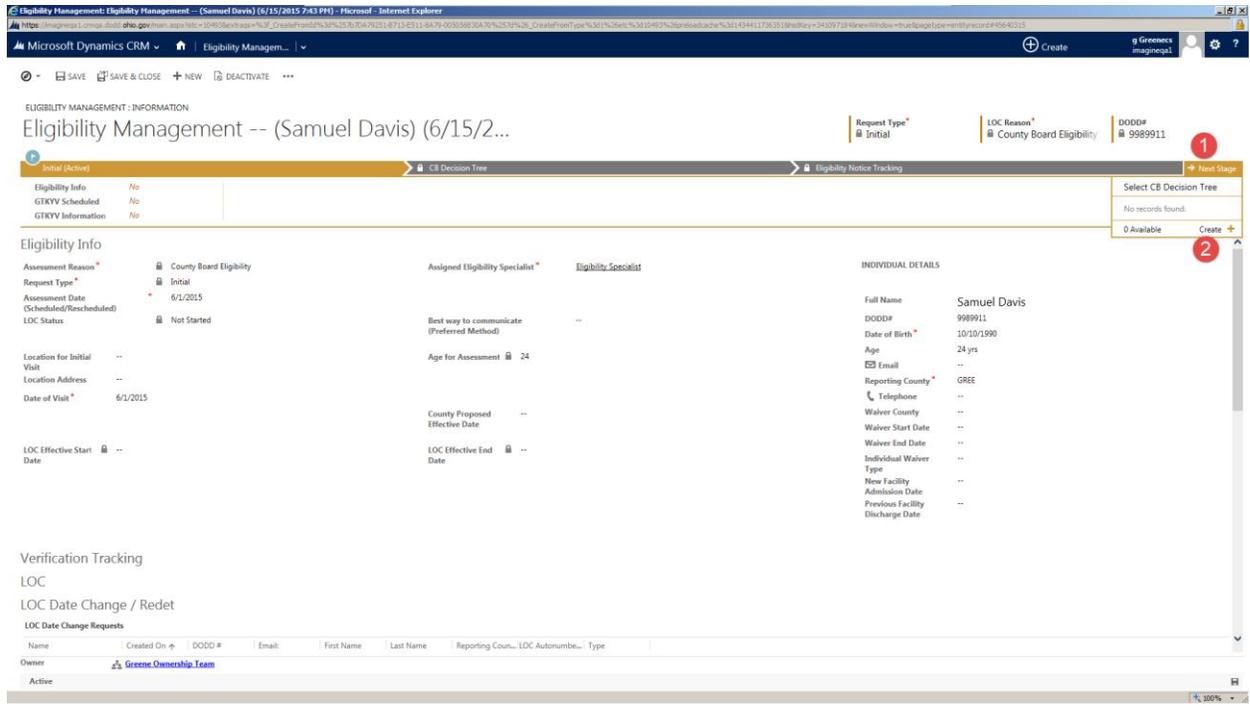
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10. Move to **Decision Tree** stage → by clicking on the “**Next Stage**” and **Create+** on Next Stage



NOTE: The decision tree is available based on the individual’s present age (Birth to 2, 3 to 5, 6 to 9 and 10 and above).



11. Enter the **Date of Determination** – can be today's or past date. This is a required field

Microsoft Dynamics CRM - Internet Explorer

Microsoft Dynamics CRM - New CB Decision Tr...

CB DECISION TREE: INFORMATION

New CB Decision Tree

Age for Assessment: 24 | LOC #: -- | Eligibility Status: -- | Notification Date: --

Initial | CB Decision Tree (Active) | Eligibility Notice Tracking

Date of Determination: 6/15/2015

Determined By: g Greenec

Assessment Reason: County Road Eligibility

Individual: Samuel Davis

can be today's or past date. This is a required field

For ages 10 and above- OPT-OUT

- Does the individual have a diagnosed severe, chronic disability?
- Is the diagnosed disability attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?
- Was the diagnosed disability manifested before the age of 22?
- Is the diagnosed disability likely to continue indefinitely?
- The disability results in substantial functional limitations in at least three of the following areas:
 - Self-care
 - Expressive/receptive communication
 - Learning
 - Mobility
 - Self-direction

Active

12. Answer all the questions on **Decision Tree**

13. **Save** or **Save and Close** at any time by clicking on the save button or the save and close button from top of this screen



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Microsoft Dynamics CRM v... New CB Decision Tr...

SAVE SAVE & CLOSE HOSK'S GUID GETTER

CB DECISION TREE: INFORMATION
New CB Decision Tree

Age for Assessment 24 LOC # -- Eligibility Status -- Notification Date --

Initial CB Decision Tree (Active) Eligibility Notice Tracking

For ages 10 and above- OPT-OUT

1. Does the individual have a diagnosed severe, chronic disability?
- Y
2. Is the diagnosed disability attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?
- Y
3. Was the diagnosed disability manifested before the age of 22?
- Y
4. Is the diagnosed disability likely to continue indefinitely?
- Y
5. The disability results in substantial functional limitations in at least three of the following areas:
- --
 - Self-care
- Y
 - Expressive/receptive communication
- Y
 - Learning
- Y
 - Mobility
- Y
 - Self-direction
- Y
 - Capacity for independent living
- Y
 - Economic self-sufficiency (N/A for individuals below age16)
- Y

Answer all questions in the decision tree and Click on Save button



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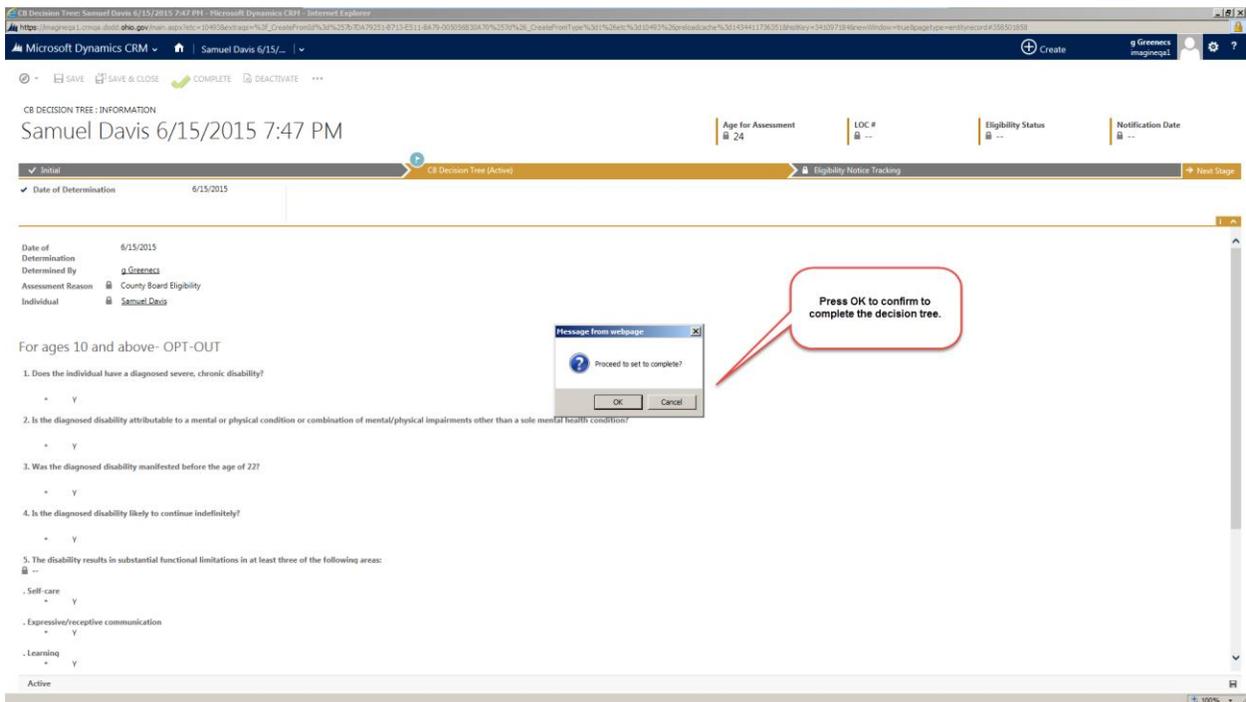
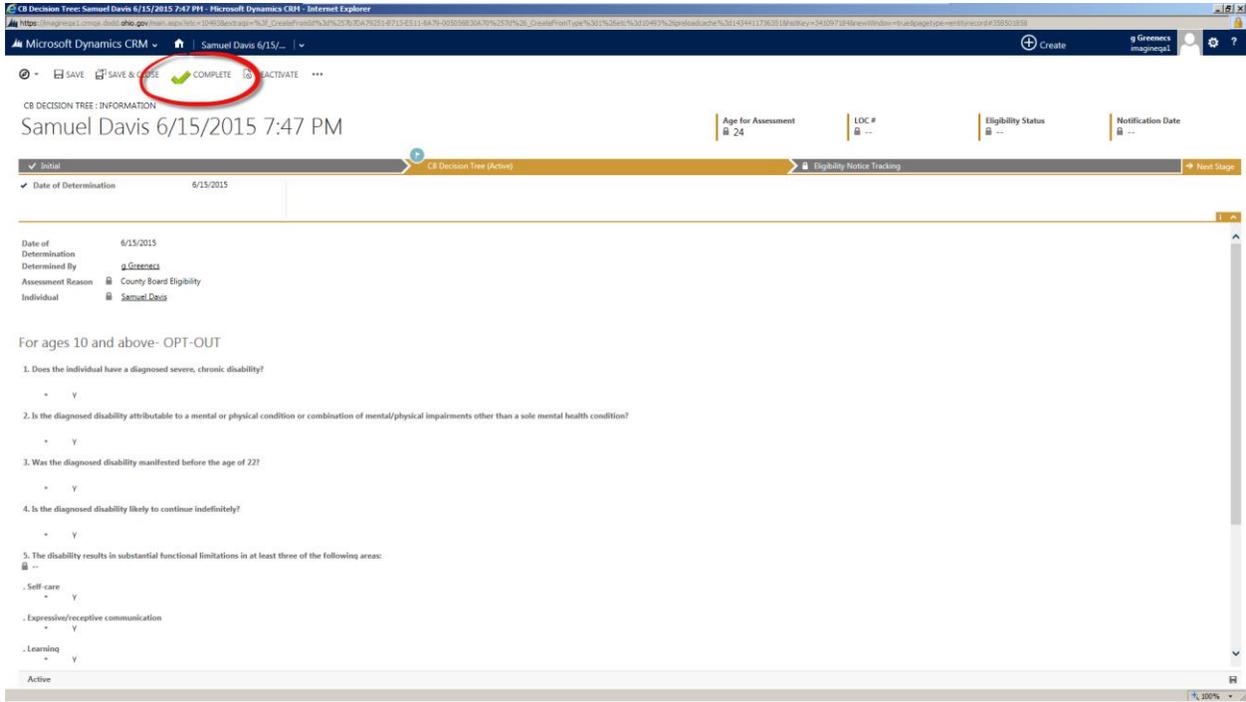
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July 1, 2015



14. Click on the **COMPLETE** button (appears only after Save) from top of this screen



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July 1, 2015

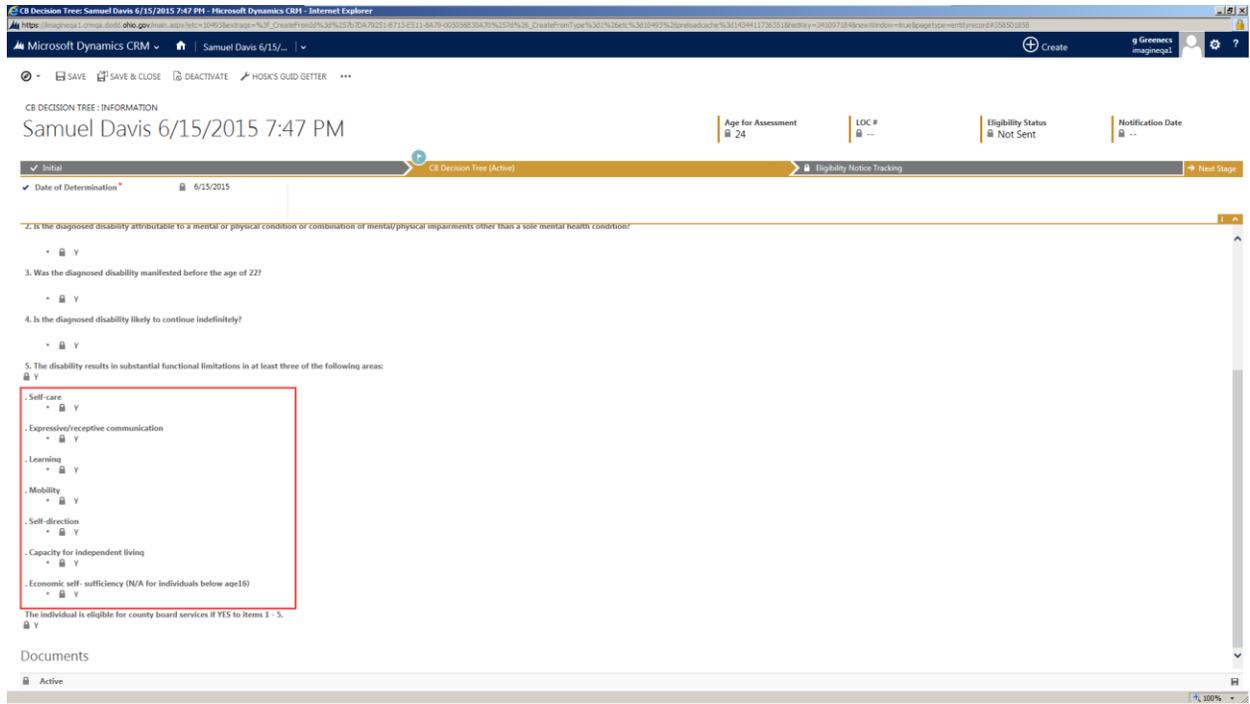


15. Once Decision Tree is Completed → **Decision Tree becomes read only**; user will see the lock symbol next to all the fields and cannot edit anything now.

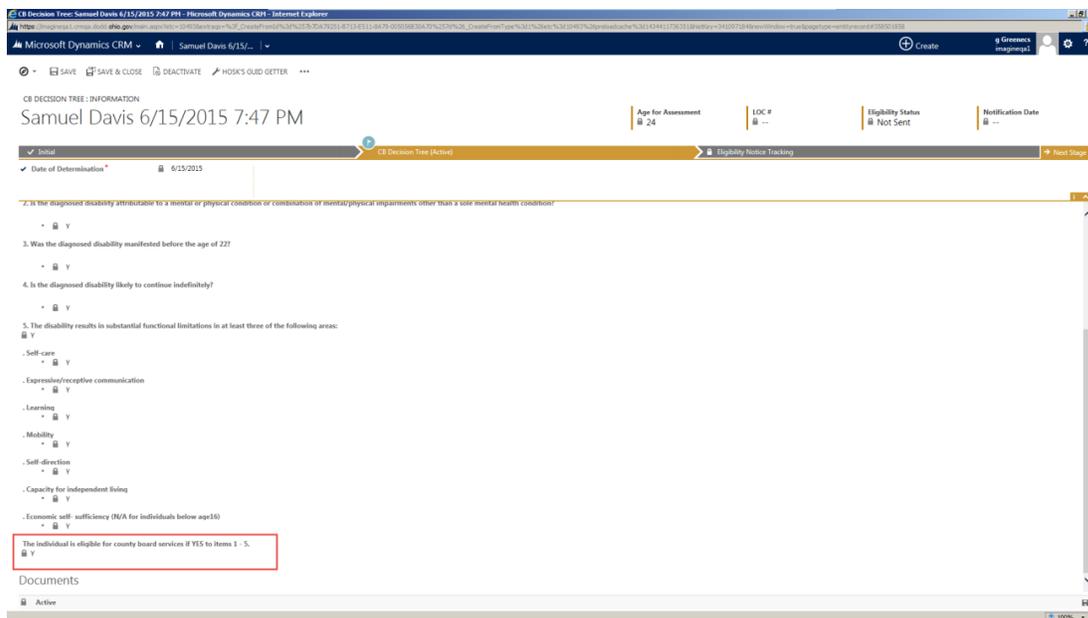
The screenshot displays the Microsoft Dynamics CRM interface for a decision tree. The header shows the user 'Samuel Davis' and the date '6/15/2015 7:47 PM'. The form is titled 'CB DECISION TREE: INFORMATION'. The 'Date of Determination' is 6/15/2015. The 'Determined By' is g.Greenecss, and the 'Assessment Reason' is County Board Eligibility Individual. The form contains several questions with 'Y' answers, such as 'Does the individual have a diagnosed severe, chronic disability?' and 'Is the diagnosed disability attributable to a mental or physical condition...'. A red callout box with a pointer to the form contains the text: 'Once decision tree is completed, the while form becomes read-only and cannot be edit further.'



16. User can view Y/N answer for question 5 after Decision Tree is Completed



17. User will see a YES/NO for if individual is county board eligible once the Decision Tree is Completed.



July 1, 2015



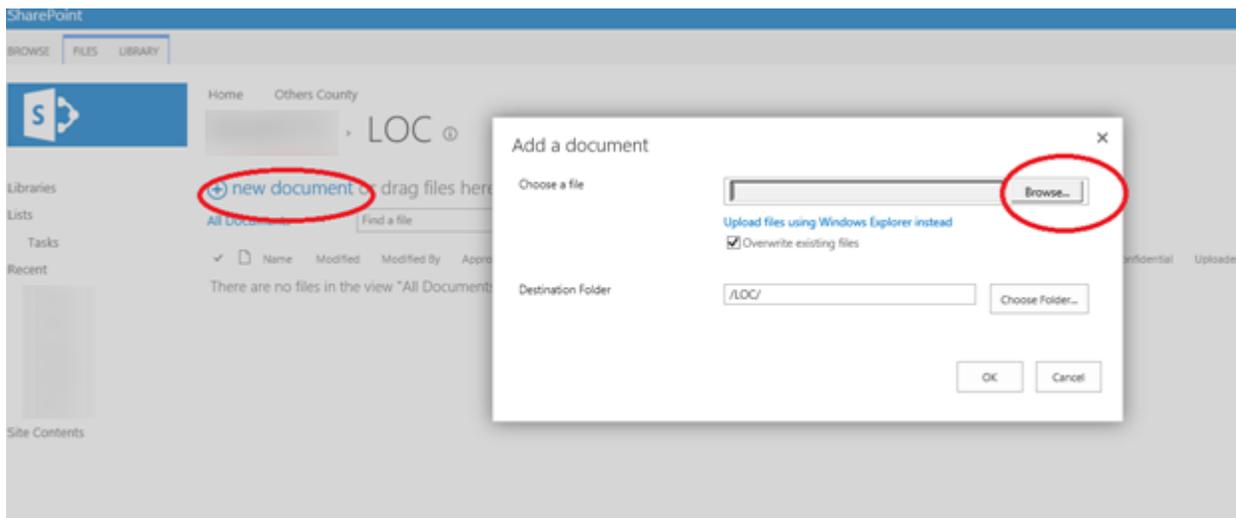
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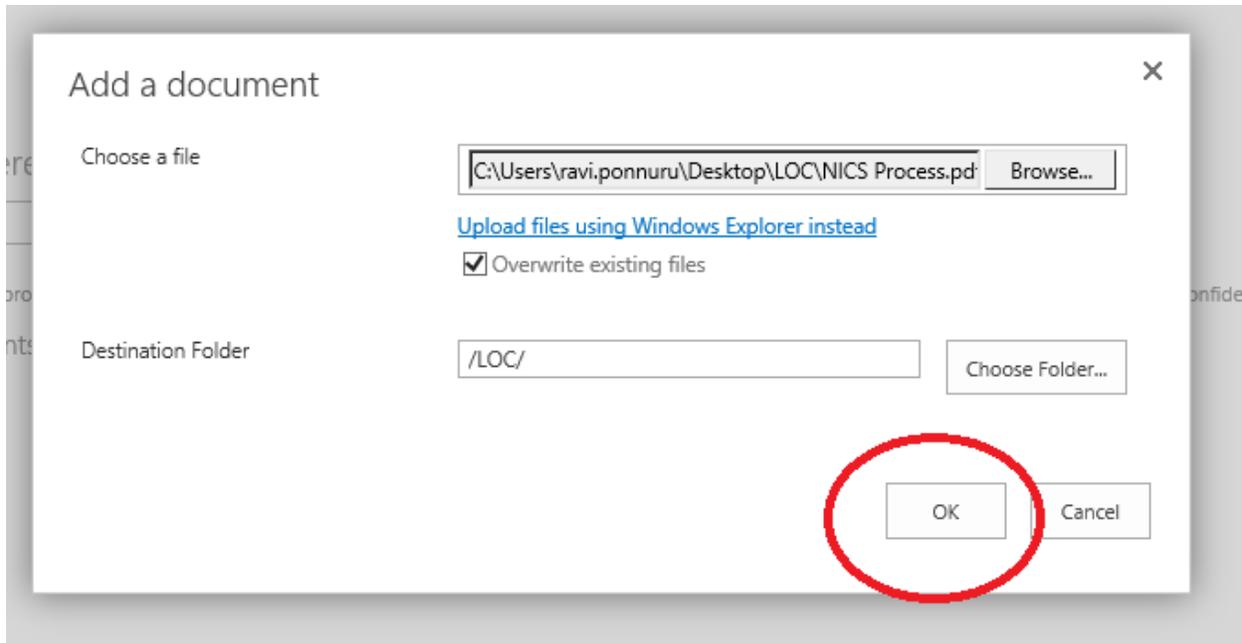


18. You can upload document to SharePoint at any time – before or after Completing the Decision Tree
19. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document to SharePoint**
 1. Click on **+new document**
 2. Click on **chose file**



3. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on “Open” once done selecting
4. You will be back on previous screen → **Click on OK**





5. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
6. **Add Section →** Select “**LOC**” from the option set
7. **Add Category →** Select the reason for what you are uploading the document → in this case it should = **LOC –Waiver**
8. **Check Primary Verification** if this is a Primary Verification document
9. Click **OK** – User will be back on Initial Stage



9449172 - NICS Process.pdf

EDIT

Check In Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

A summary of this resource

Section *

Category * Choose Section:

LOC Number

LOC Status

Primary Verification

LOC Status

Primary Verification

LOC Number



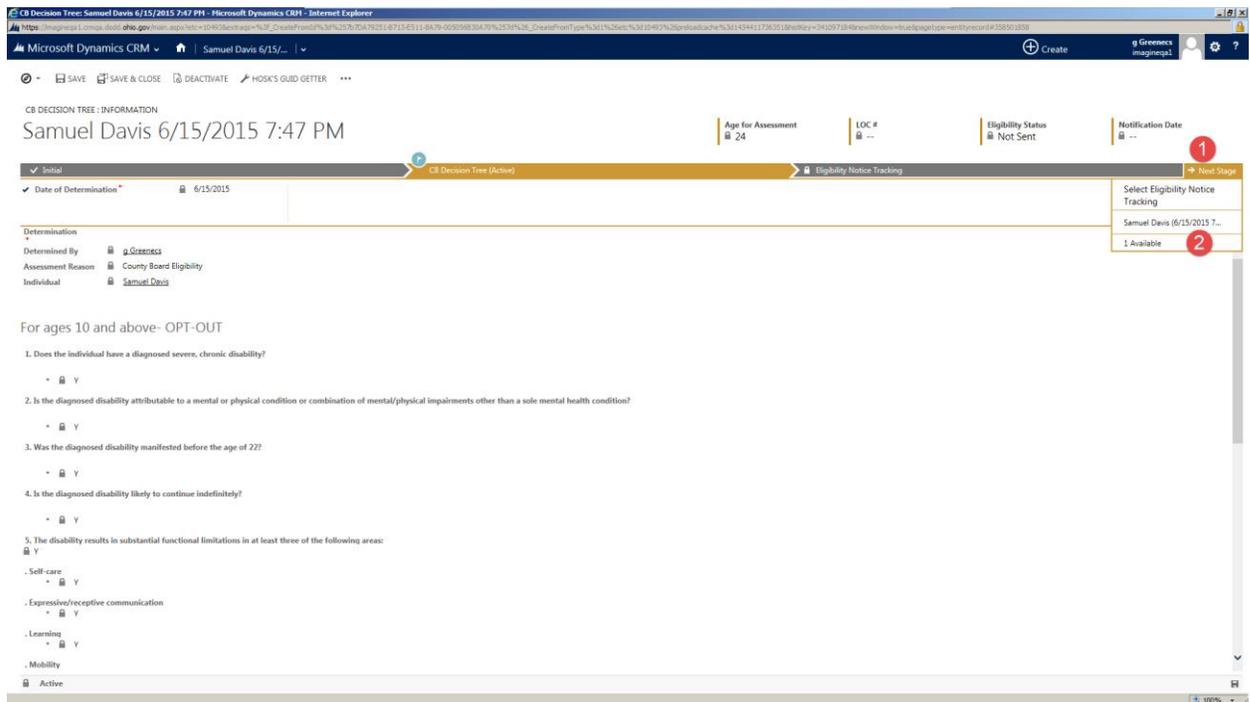
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20. Move to **Eligibility Notice Tracking** stage → by clicking
 1. on the **“Next Stage”** and
 2. **Select the Eligibility Notice** that is available.



3. **Type of Notification** will auto populate per the result of the tool (**Eligible/Yes** on LOC Tool or **Ineligible/No** on the LOC Tool)

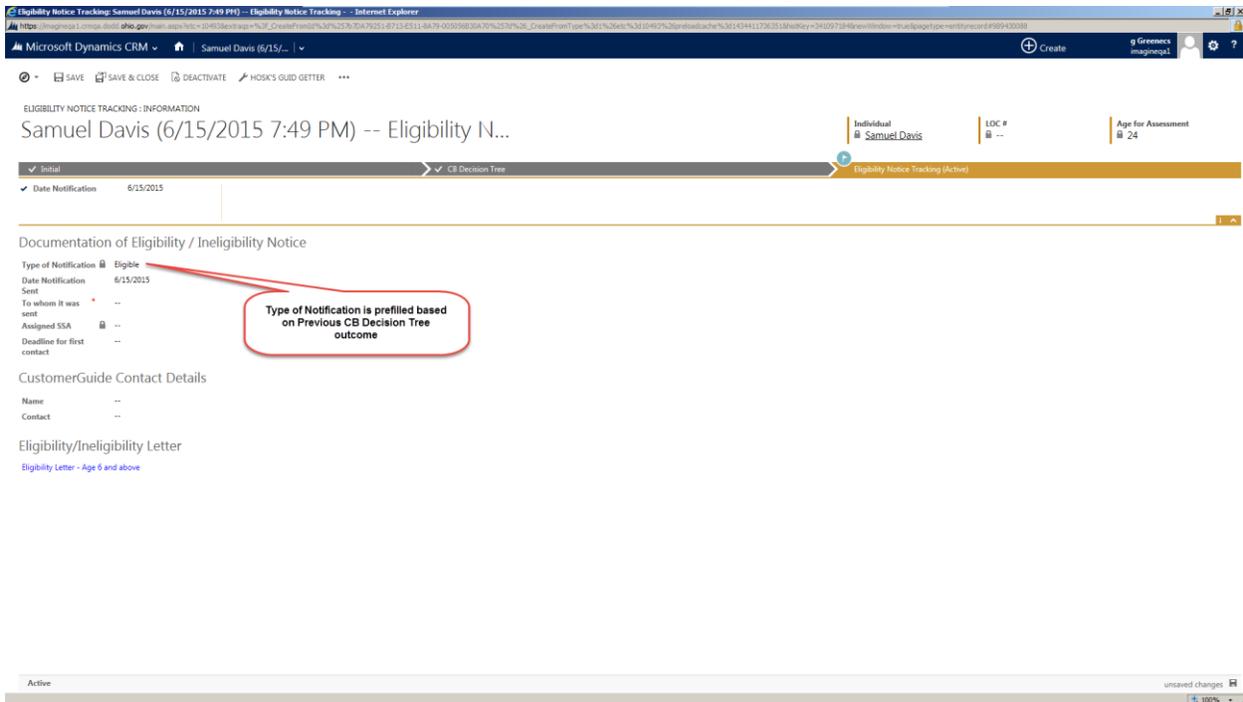


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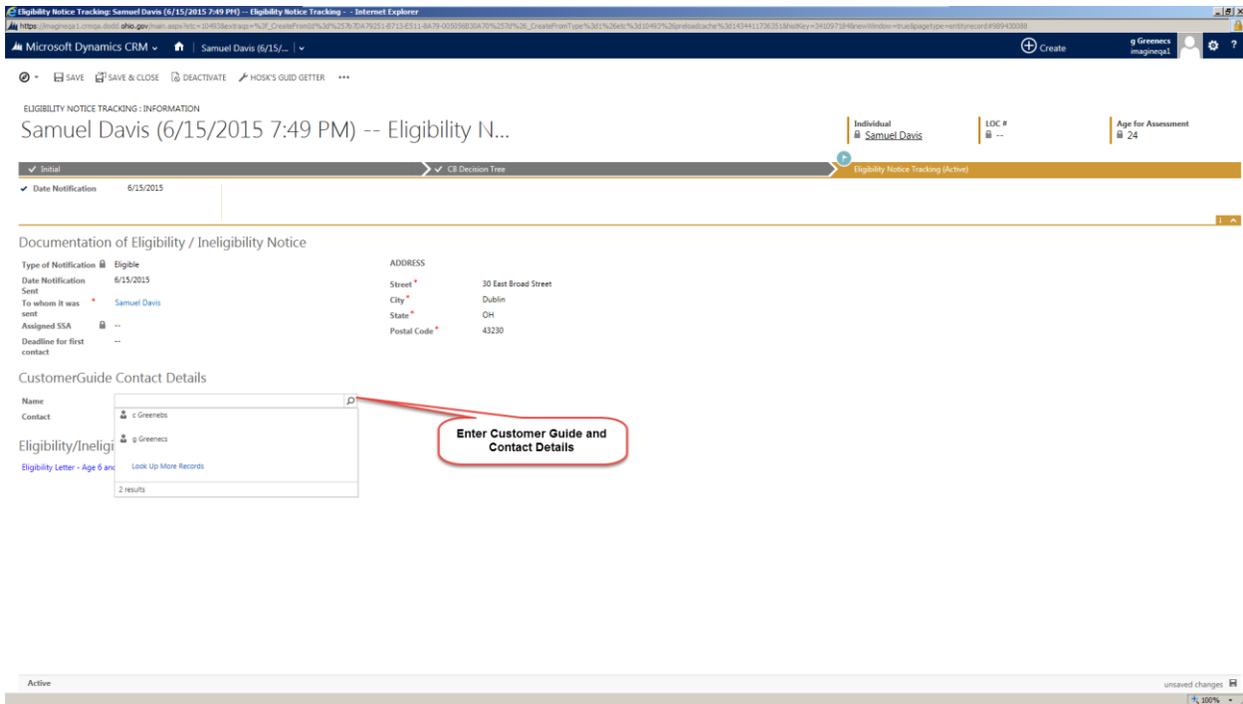
4. Enter **Date notification Sent** – date when you will send this notification to the individual. Not a required field.
5. Fill in **To Whom it was Sent**
 1. By selecting the Individual’s name or individual’s parent or guardian’s name from the option set.



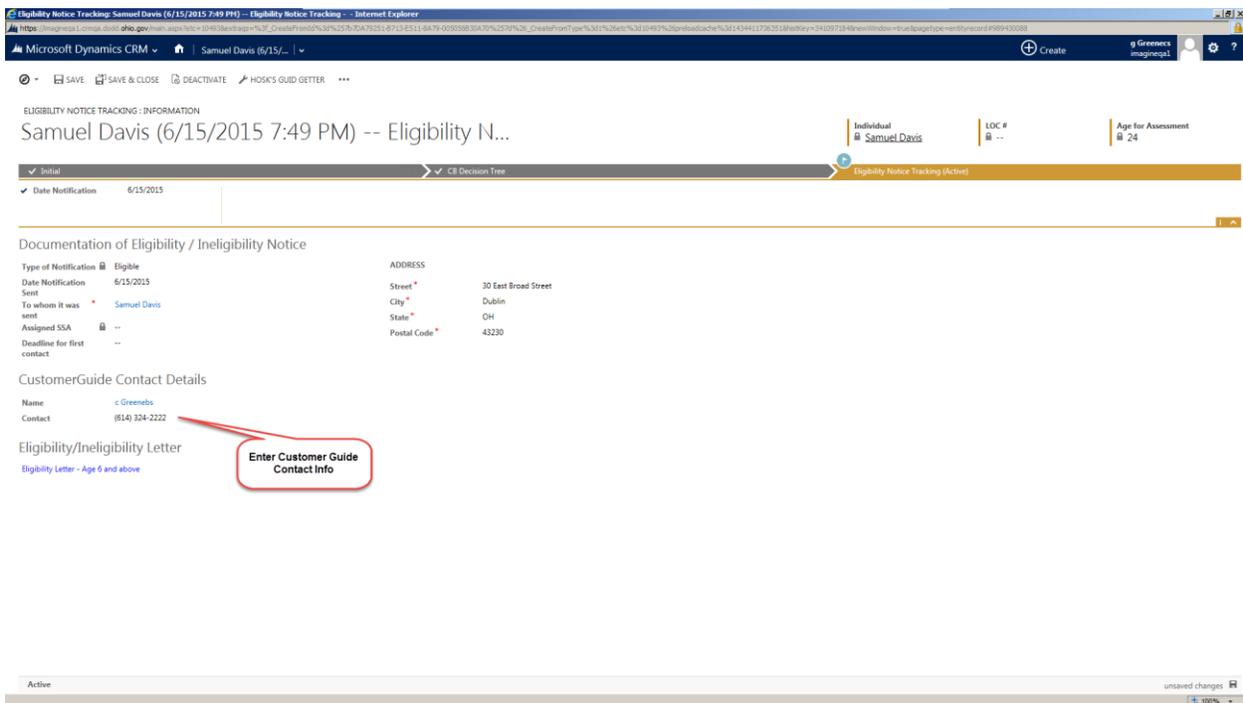
The screenshot displays the Microsoft Dynamics CRM interface for tracking an eligibility notice. The main content area shows the 'Documentation of Eligibility / Ineligibility Notice' section. A modal dialog box is open, displaying a warning message: 'There is no mailing address for the individual. Please enter the address.' The dialog has an 'OK' button. The form behind the dialog has an 'ADDRESS' section with fields for Street, City, State, and Postal Code. A red circle '1' is next to the 'To whom it was sent' field in the notification details. A red circle '2' is next to the 'OK' button in the modal dialog. A red circle '3' is next to the 'ADDRESS' field in the form.

2. If the person to whom the mail has to be sent does not have mailing address, system will prompt you to enter mailing address. Press OK to confirm.
3. **Enter the mailing address** for the individual. Address will be prefilled if individual have a mailing address on his profile
6. **Select a Customer Guide or Eligibility Specialist** by clicking on the magnifying glass - this will show you list of all customer guide and eligibility specialist in your county.

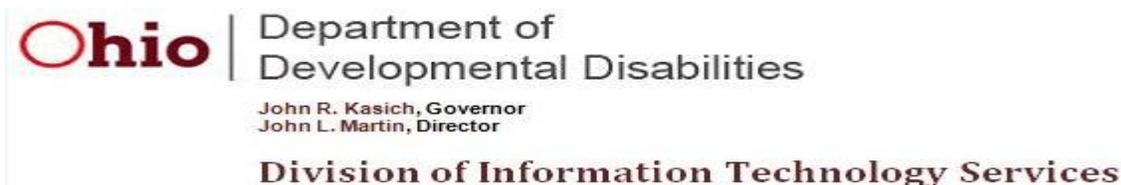


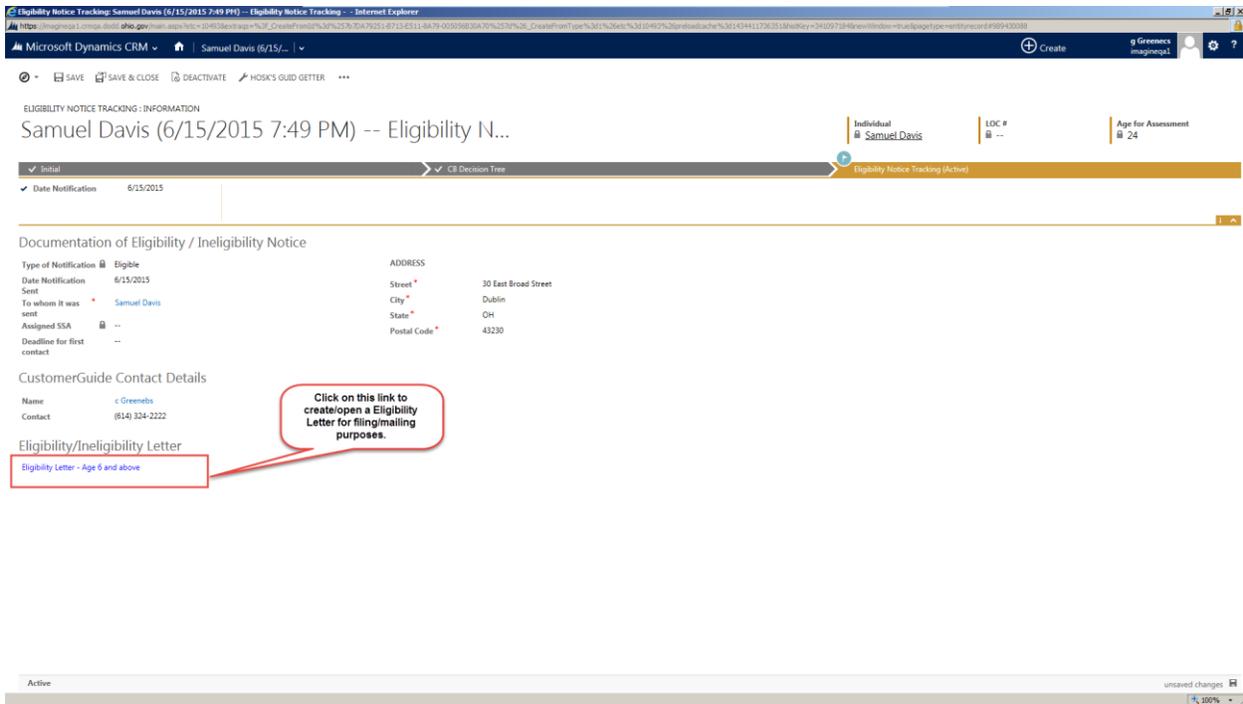


15. Enter Customer Guide’s contact information

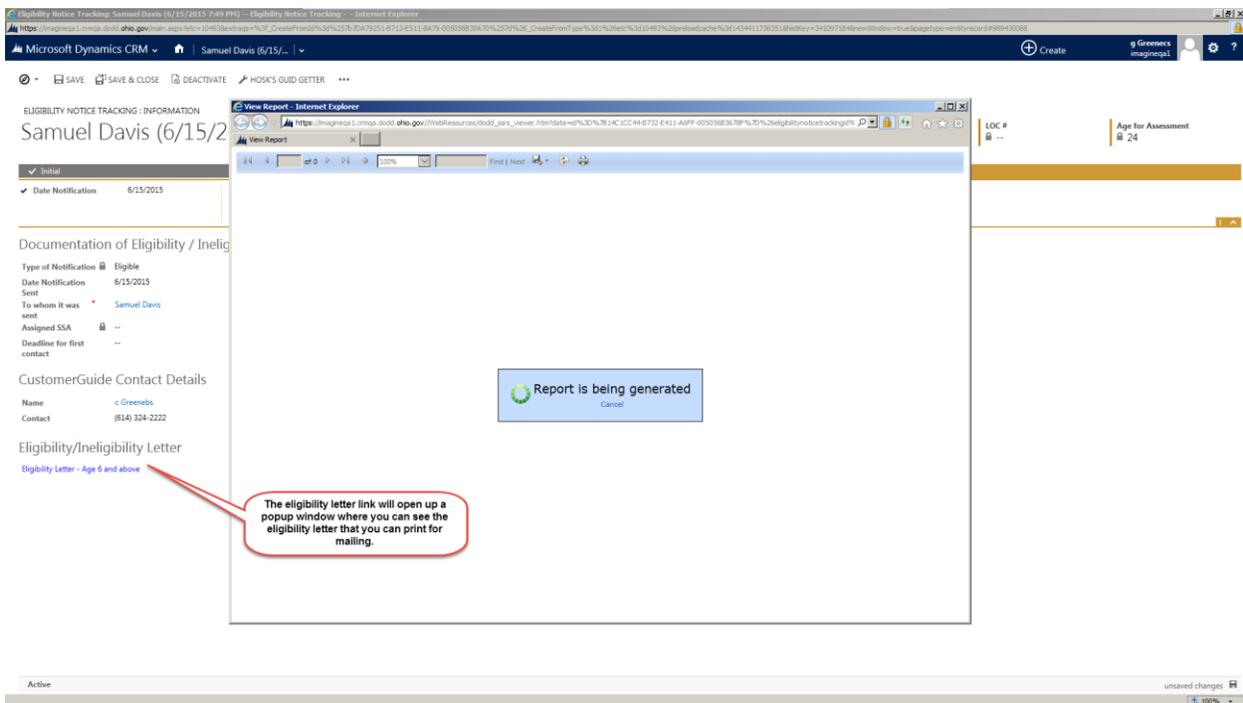


16. Open the **Eligible/Ineligible Notice** by clicking on the link under the Eligibility/Ineligibility Letter Tab





17. Eligible/Ineligible Notice will open in a new tab



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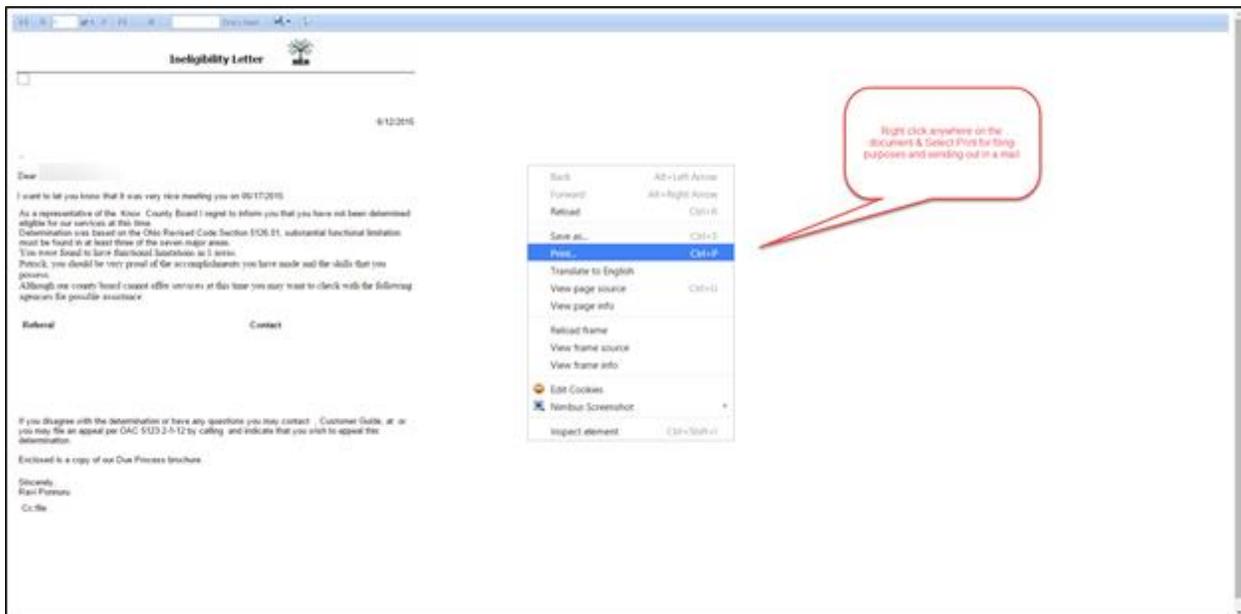
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18. Right click on your mouse and select print to **Print the Notice**



You just completed the County Board eligibility for an individual



LOC for County Board Eligibility (Applies to only 10 & above individuals)

1. To start county board eligibility for an Individual, Search for individual by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box
3. **Individual record will show up** if individual exist in your county
4. Double click on individual record to open individual's record
5. User will land on **Individual front page**

The screenshot shows the Microsoft Dynamics CRM interface for an individual named 'headphone mike'. The page is titled 'INDIVIDUAL INFORMATION' and displays various fields for personal and contact information.

Individual Information:

- Nick Name: --
- First Name: headphone
- Middle Name: --
- Last Name: mike
- Generation: --
- Email: --
- Date Of Birth: 1/6/2015
- Age: 0 yrs 5 mos
- Full Name: headphone mike
- Date of Birth: 1/6/2015
- SSN: XXX-XX-0105
- Assigned SSA: --

Phone Information:

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

Essential Health Indicators: (Icons for various health services)

Case Notes

Addresses:

Minors About Me	9989579	Medicaid ID	XXXXXXXX4564	Reporting County	ALLE
-----------------	---------	-------------	--------------	------------------	------

Active | unsaved changes



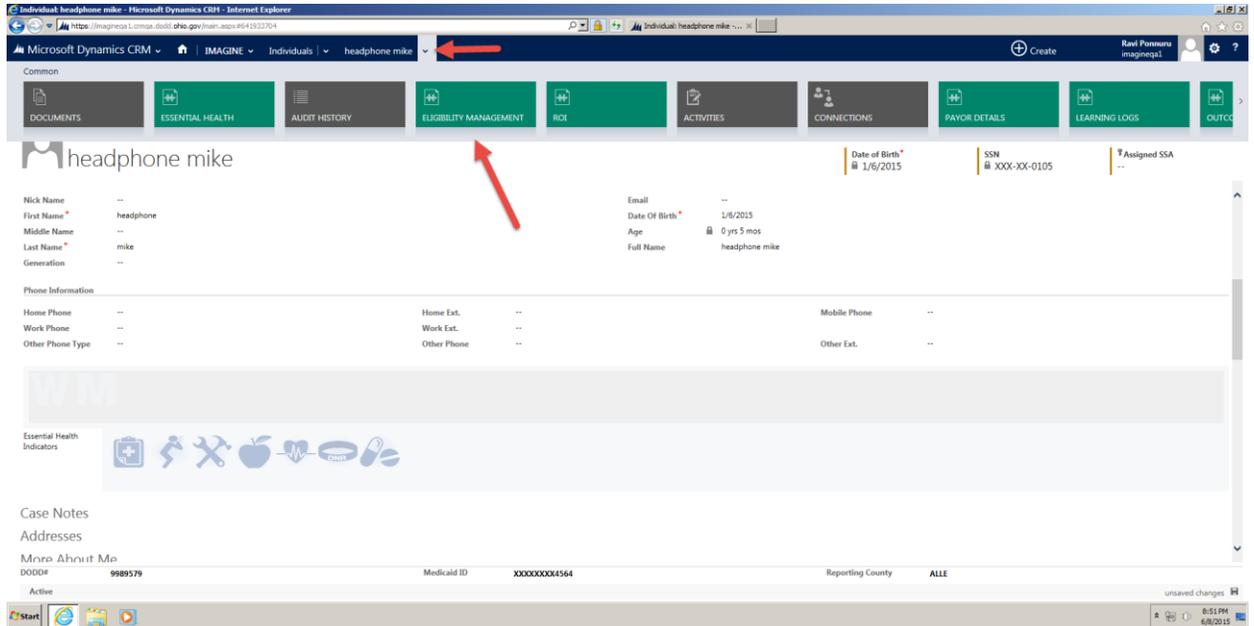
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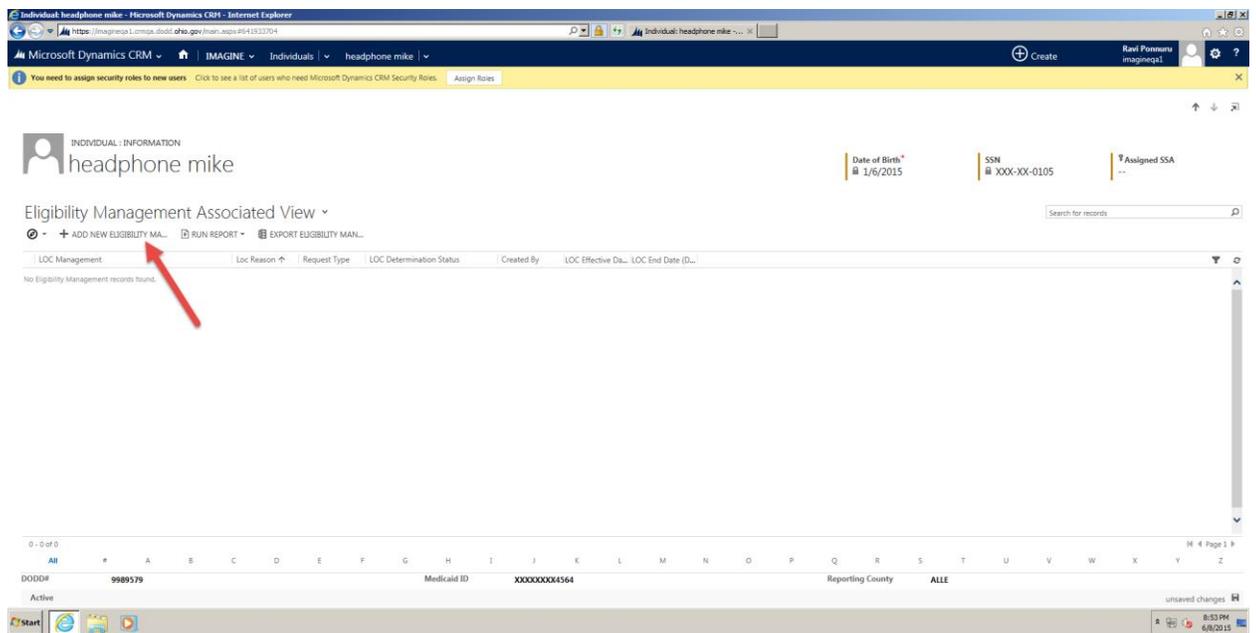


6. Start Eligibility Process - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



7. User will land on **Eligibility Management View Page**—you can see all the eligibilities done for that individual

8. **Add New Eligibility Management**



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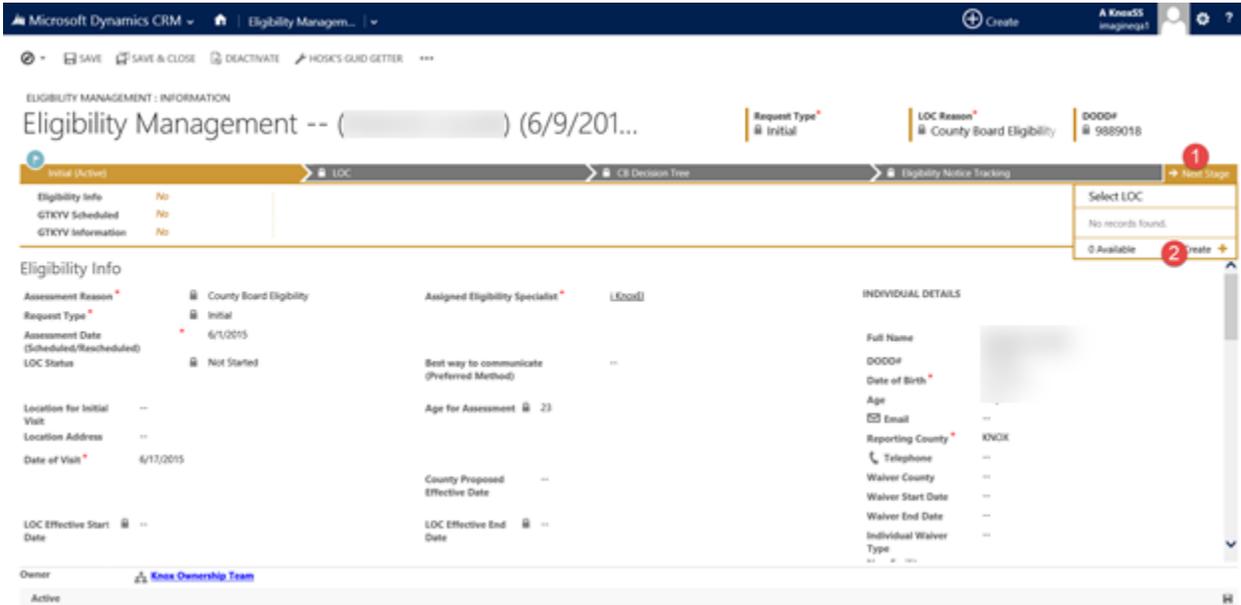


9. Enter required information on **Initial stage** to Save Eligibility management
 1. **Assessment Reason** = select County Board Eligibility
 2. **Assessment Type** = Initial
 3. **Assessment Date** = can be today's or past date – it's when you are got this information from individual
 4. **Date of Visit** = can be today's or past date – it's when you met with individual to capture this information
 5. **Assign Eligibility Specialist** = click on the magnifying and select the eligibility specialist who will work with the individual
 6. Click on Save button

The screenshot shows the 'New Eligibility Management' form in Microsoft Dynamics CRM. The form is titled 'New Eligibility Management' and is currently in the 'Initial' stage. The 'Request Type' is 'Initial', the 'LOC Reason' is 'County Board Eligibility', and the 'DODDF#' is '9989574'. The 'Eligibility Info' section includes fields for 'Assessment Reason' (County Board Eligibility), 'Request Type' (Initial), 'Assessment Date' (6/2/2015), 'Date of Visit' (6/11/2015), and 'LOC Status' (Not Started). The 'Assigned Eligibility Specialist' section has a search box for 'EligibilitySpec Test' with a magnifying glass icon. The 'INDIVIDUAL DETAILS' section shows information for 'Ada Lovelace', including 'DODDF#' (9989574), 'Date of Birth' (5/13/2009), 'Age' (6 yrs 0 mos), 'Reporting County' (EELM), and 'Telephone'. The 'Verification Tracking' section shows 'LOC' and 'Owner' (Belmont Ownership Team). The 'Save' button is highlighted with a red circle at the top left.



10. Move to **LOC stage** by clicking on
 1. The “**Next Stage**” &
 2. **Create+** on Next Stage



11. User will be now be on the LOC tool



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12. User will view some information that was already entered before and will have a lock symbol next to it, which means they are not editable

The screenshot shows the 'New LOC' form in Microsoft Dynamics CRM. The 'General' section contains the following fields:

- LOC Type: Initial (locked)
- Assessment Reason: County Board Eligibility (locked)
- LOC Status: Not Started (locked)
- Waiver Type: --
- County Proposed Effective Date: 6/9/2015
- Date of Assessment: 6/9/2015
- County: KNOX (locked)
- Assigned Evaluator: A.Kno55 (locked)

 The 'Individual Details' section includes:

- Full Name: [Redacted]
- Date of Birth: [Redacted]
- SSN: [Redacted]
- Medicaid ID: [Redacted]

 The 'Informant Information' section shows the Owner as 'Knox Ownership Team' and the status as 'Active'. Red arrows in the original image point to the lock symbols on the LOC Type, Assessment Reason, LOC Status, and County fields.

13. All fields on LOC are **REQUIRED** to complete LOC

14. Enter the General information on LOC and **SAVE**

This screenshot shows the 'New LOC' form with three red circles highlighting specific fields:

- Circle 1: Points to the 'Waiver Type' dropdown menu, which is currently set to 'IO'.
- Circle 2: Points to the 'Document(s) Reviewed' text area, which contains the text 'Reviewed with medical advisor'.
- Circle 3: Points to the 'Location of Assessment' dropdown menu, which is currently set to 'At Home'.

 Other fields in the 'General' section include:

- LOC Type: Initial
- Assessment Reason: County Board Eligibility
- LOC Status: Not Started
- Assigned Evaluator: A.Kno55
- County Proposed Effective Date: 6/9/2015
- Date of Assessment: 6/9/2015
- County: KNOX

 The 'Individual Details' and 'Informant Information' sections are also visible, with the owner listed as 'Knox Ownership Team'.



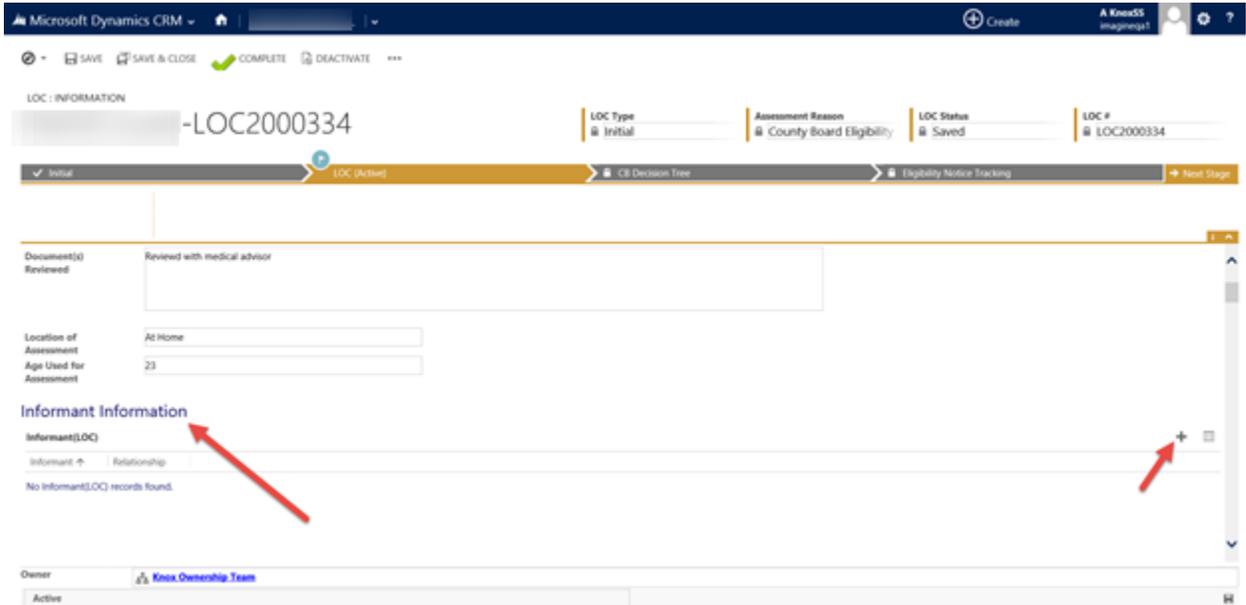
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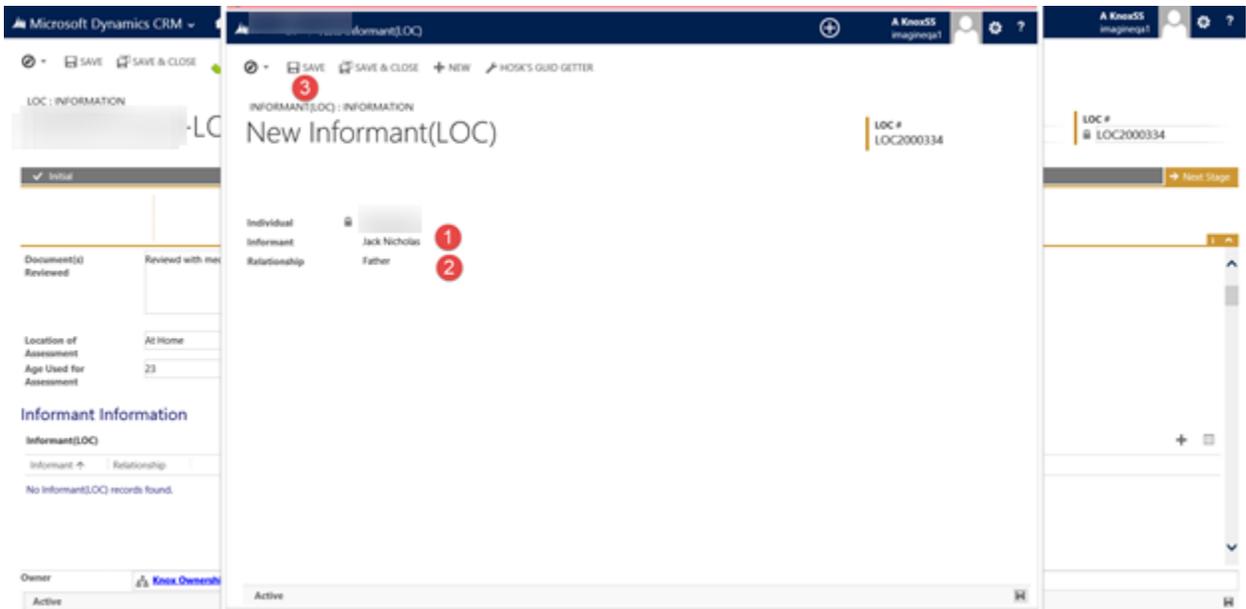
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15. **Add informant** by clicking on the + sign on your right hand side → enter informant’s name and relationship with individual in the pop up that will appear



1. Add Informant Name
2. Add Informant relationship with individual.
3. And click on **SAVE** button.



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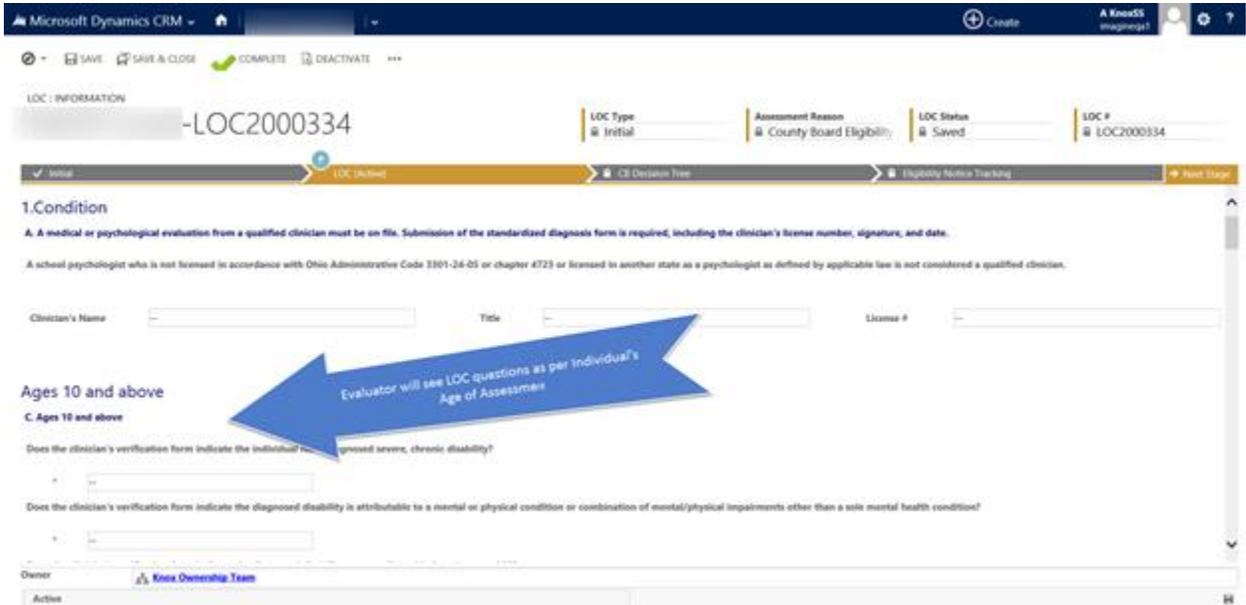
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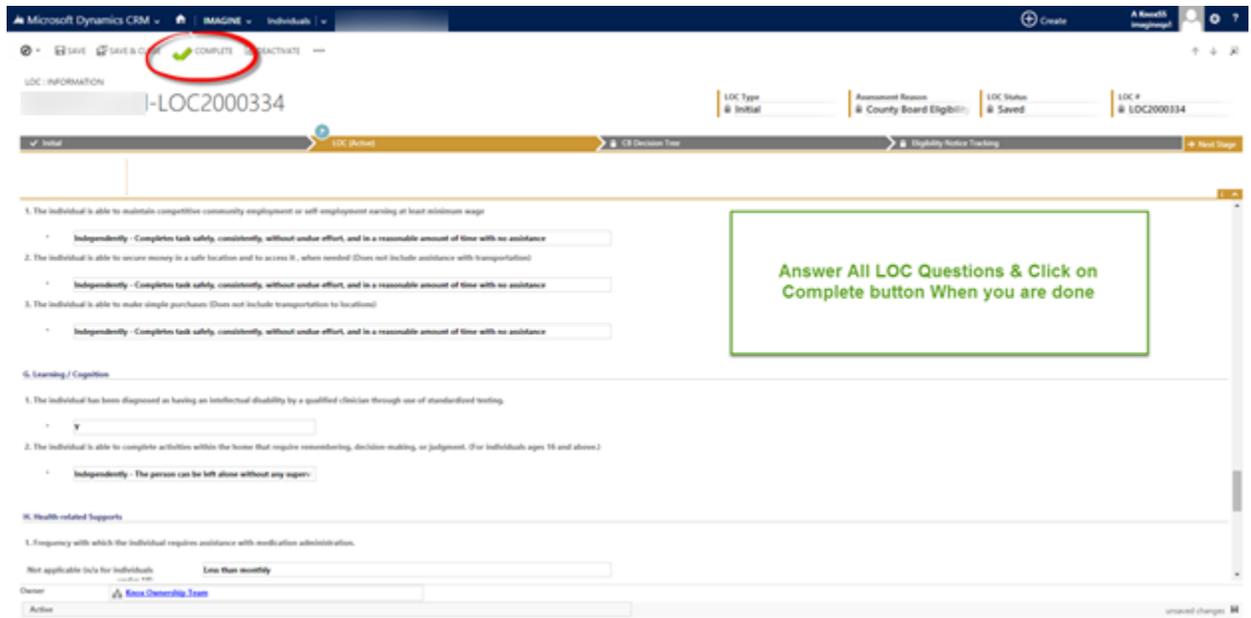
16. Evaluator will see **LOC questions as per Individual’s Age**
(always 10 and above for county board eligibility)



17. Answer all the questions on LOC

18. Save LOC at any time.

19. **Complete LOC** by clicking on the “**Complete**” button;
once all information on LOC is entered



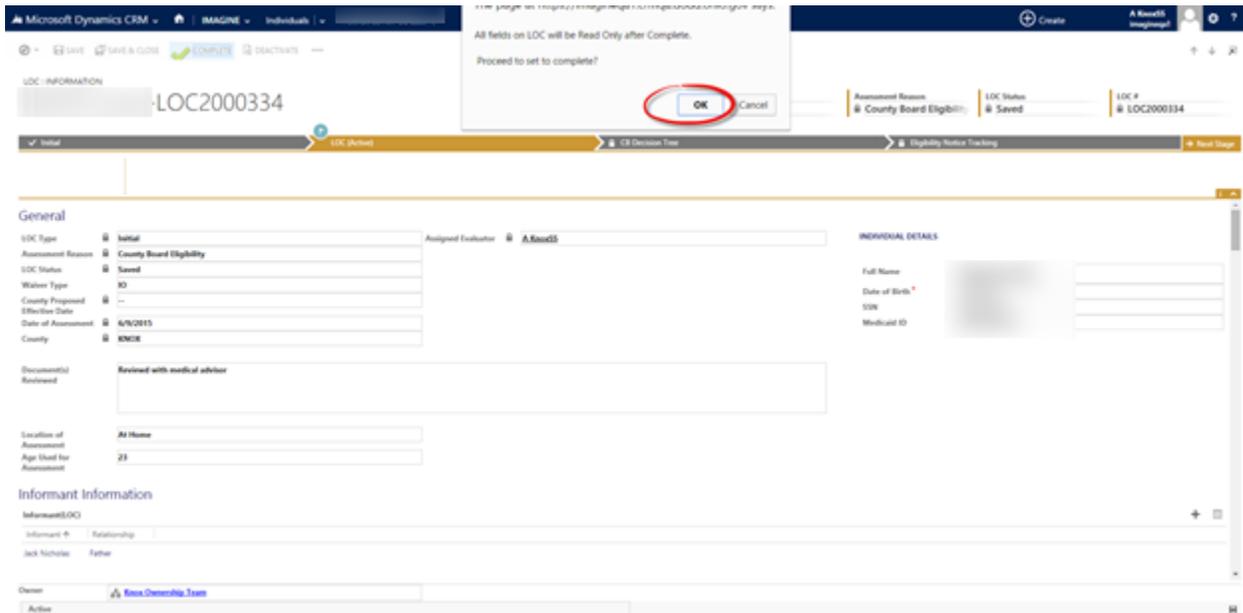
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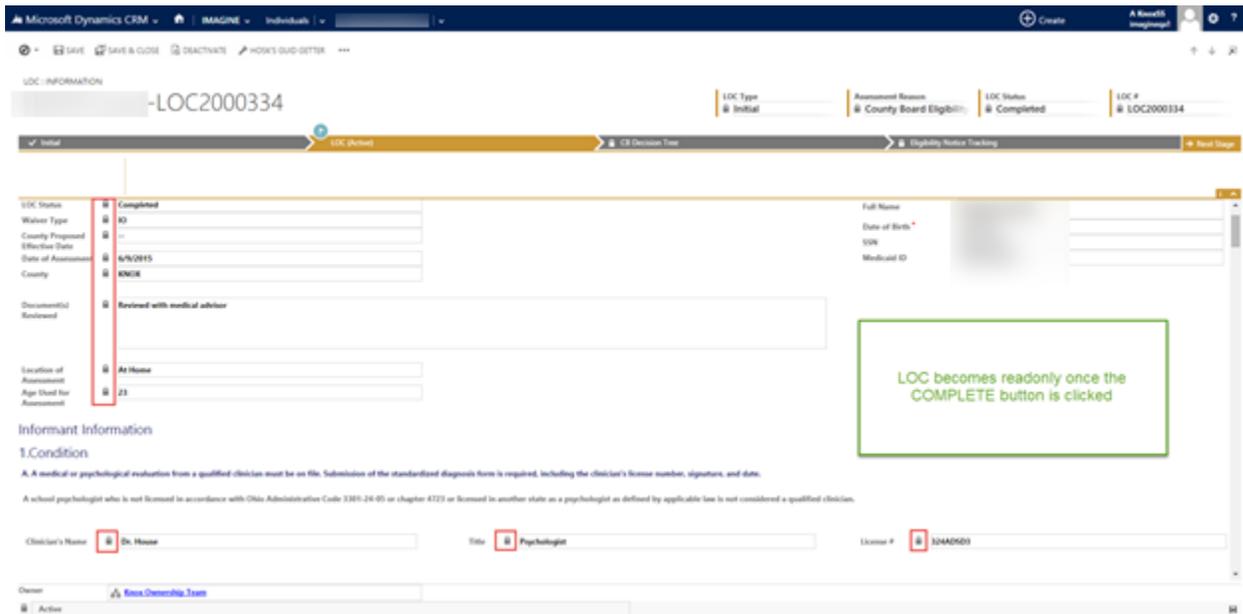
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20. Click on OK when it confirms to complete LOC



21. Once LOC is Completed → LOC becomes read only; user will see the lock symbol next to all the fields and cannot edit anything now.



22. View Score per Section (major life area) after LOC is Completed

Microsoft Dynamics CRM - Patrick Lowell LOC2000334

LOC INFORMATION: -LOC2000334

LOC Type: Initial | Assessment Reason: County Board Eligibility | LOC Status: Completed | LOC #: LOC2000334

Initial | LOC (Active) | CS Decision Tree | Eligibility Notice Tracking | Next Step

Independently - Completes task safely, consistently, without undue effort, and in a reasonable amount of time with no assistance

3. The individual is able to make simple purchases (Does not include transportation to locations)

Independently - Completes task safely, consistently, without undue effort, and in a reasonable amount of time with no assistance

Economic Proficiency Score

Substantial: N | Functional Classification: N | Score: N

Learning / Cognition

1. The individual has been diagnosed as having an intellectual disability by a qualified clinician through use of standardized testing.

Y

2. The individual is able to complete activities within the home that require remembering, decision making, or judgment. (For individuals ages 18 and above.)

Independently - The person can be left alone without any supports

Learning / Cognition Score

Substantial: Y | Functional Classification: Y | Score: N

Health related Supports

Chen: Ross, Dementia Team

Active

23. View LOC Summary after LOC is Completed

Microsoft Dynamics CRM - Patrick Lowell LOC2000334

LOC INFORMATION: -LOC2000334

LOC Type: Initial | Assessment Reason: County Board Eligibility | LOC Status: Completed | LOC #: LOC2000334

Initial | LOC (Active) | CS Decision Tree | Eligibility Notice Tracking | Next Step

None (N/A): Less than monthly

Speech Therapy: Less than monthly

Physical Therapy: Less than monthly

Occupational Therapy: Less than monthly

LOC Summary (Ages 10 and above)

1. Does the clinician's verification form indicate the individual has a diagnosed severe, chronic disability? Y

2. Does the clinician's verification form indicate the diagnosed disability is attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition? Y

3. Does the clinician's verification form indicate the diagnosed disability was manifested before the age of 22? Y

4. Does the clinician's verification form indicate the diagnosed disability is likely to continue indefinitely? Y

5. The disability results in substantial functional limitations in at least three of the following areas:

- Self-care: N
- Expression/receptive communication: N
- Learning: N
- Mobility: N
- Self-direction: N
- Capacity for independent living: N
- Economic self-sufficiency (N/A for individuals below age 18): Y

LOC Total Score

Chen: Ross, Dementia Team

Active



24. View LOC Eligible = YES/NO after LOC is Completed

Microsoft Dynamics CRM - Microsoft Dynamics CRM

LOC INFORMATION: -LOC2000334

LOC Type: Initial | Assessment Reason: County Board Eligibility | LOC Status: Completed | LOC #: LOC2000334

Progress: Initial (Completed) → LOC (Active) → CB Decision Tree → Eligibility Notice Tracking → Next Stage

3. The disability results in substantial functional limitations in at least three of the following areas:

- Self-care
- Expressive/receptive communication
- Learning
- Mobility
- Self-direction
- Capacity for independent living
- Economic self-sufficiency (N/A for individuals below age 18)

LOC Total Score: 1 Substantial Functional Limitation area was identified

Is LOC Eligible: N | Total Score: 1

LOC Notes: LOC Tool is completed. LOC (CB only) for Patrick Lovell has been marked as completed. Modified by James Beahm Today.

Owner: James Beahm | Role: Team Membership Team

25. Move to **Decision Tree** stage → by clicking on the
 1. “Next Stage” &
 2. Select the Determination Packet that is created

Microsoft Dynamics CRM - Microsoft Dynamics CRM

LOC INFORMATION: -LOC2000334

LOC Type: Initial | Assessment Reason: County Board Eligibility | LOC Status: Completed | LOC #: LOC2000334

Progress: Initial (Completed) → LOC (Active) → CB Decision Tree → Eligibility Notice Tracking → Next Stage (1)

3. The disability results in substantial functional limitations in at least three of the following areas:

- Self-care
- Expressive/receptive communication
- Learning
- Mobility
- Self-direction
- Capacity for independent living
- Economic self-sufficiency (N/A for individuals below age 18)

LOC Total Score: 1 Substantial Functional Limitation area was identified

Is LOC Eligible: N | Total Score: 1

LOC Notes: LOC Tool is completed. LOC (CB only) for Patrick Lovell has been marked as completed. Modified by James Beahm Today.

Owner: James Beahm | Role: Team Membership Team

Next Stage (1) dropdown: Select CB Decision Tree (2), Patrick Lovell (6/9/2015), 1 Available



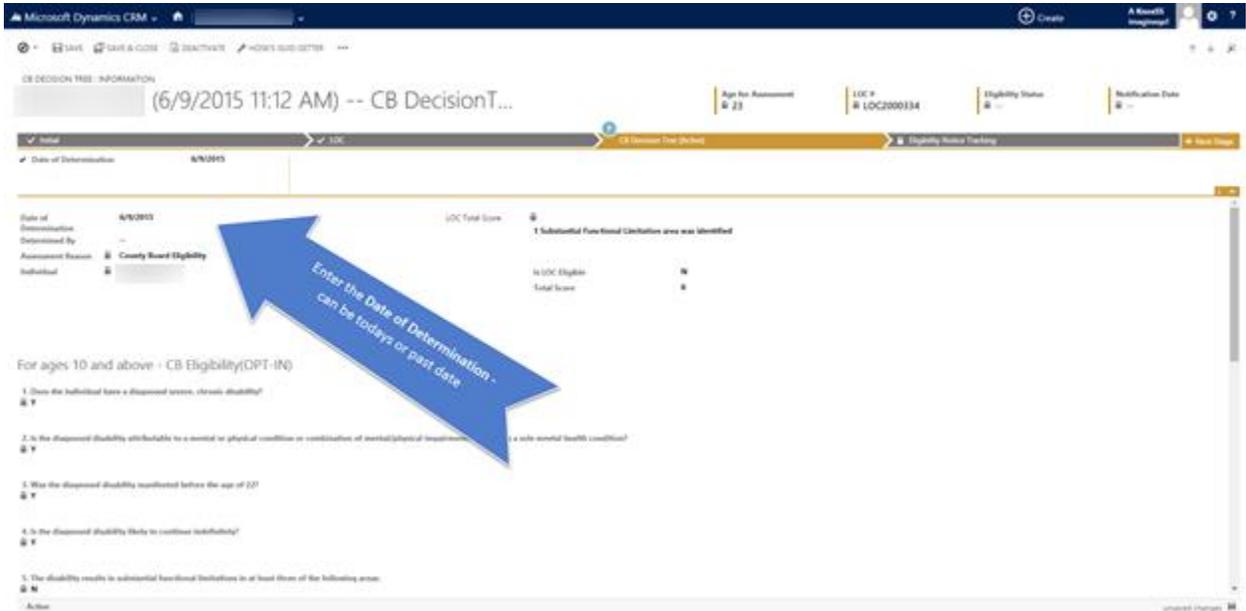
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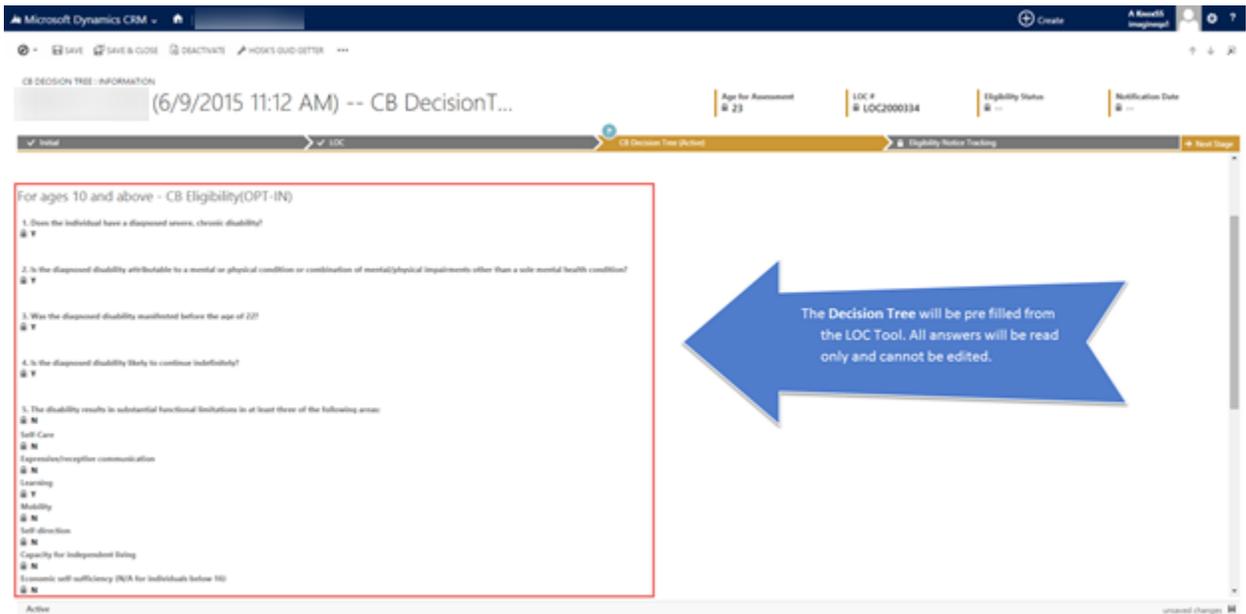
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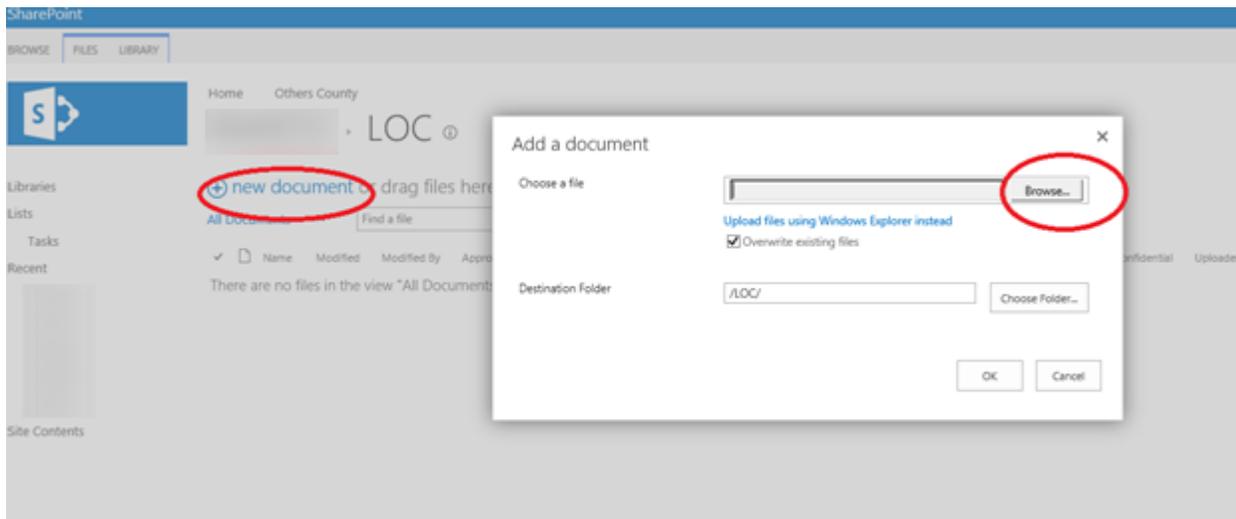
26. Enter the **Date of Determination** – can be today's or past date



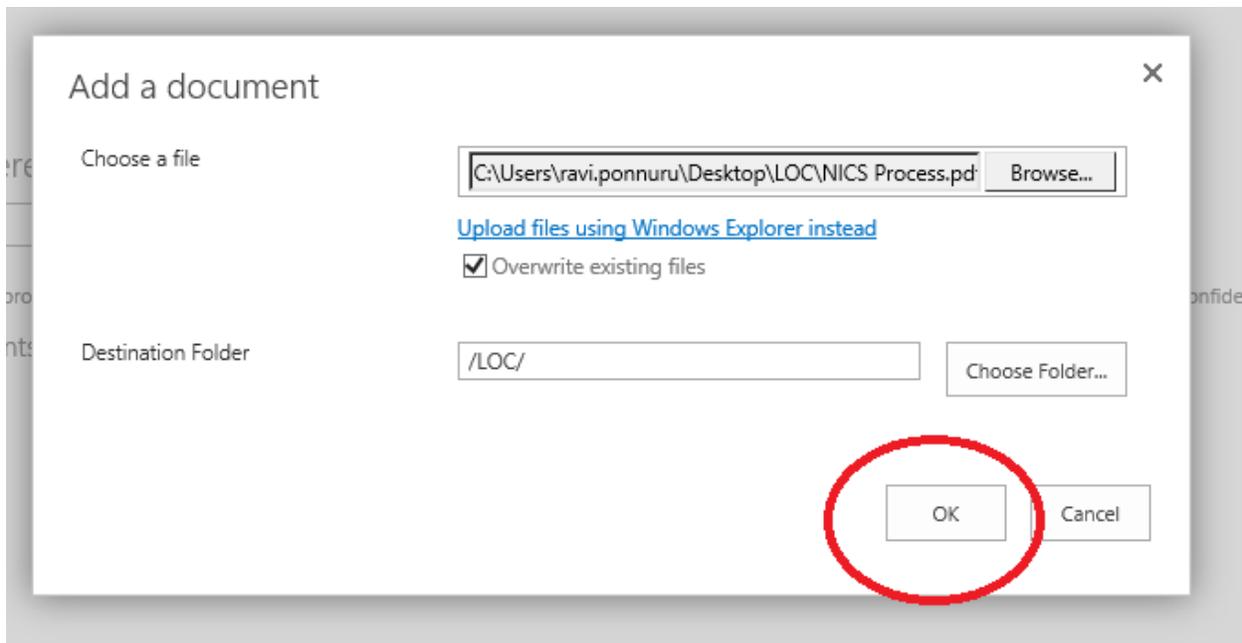
27. The **Decision Tree** will be pre filled from the LOC Tool. All answers will be read only and cannot be edited



28. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document** to SharePoint
1. Click on **+new document**
 2. Click on **chose file**



3. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on “Open” once done selecting
4. You will be back on previous screen → **Click on OK**



5. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
6. **Add Section →** Select “**LOC**” from the option set
7. **Add Category →** Select the reason for what you are uploading the document → in this case it should = **LOC –Waiver**
8. **Check Primary Verification** if this is a Primary Verification document
9. Click **OK** – User will be back on Initial Stage



9449172 - NICS Process.pdf

EDIT

Check In Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

A summary of this resource

Section * [dropdown]

Category * Choose Section: [dropdown]

LOC Number [input]

LOC Status [input]

Primary Verification

LOC Status

Primary Verification

LOC Number



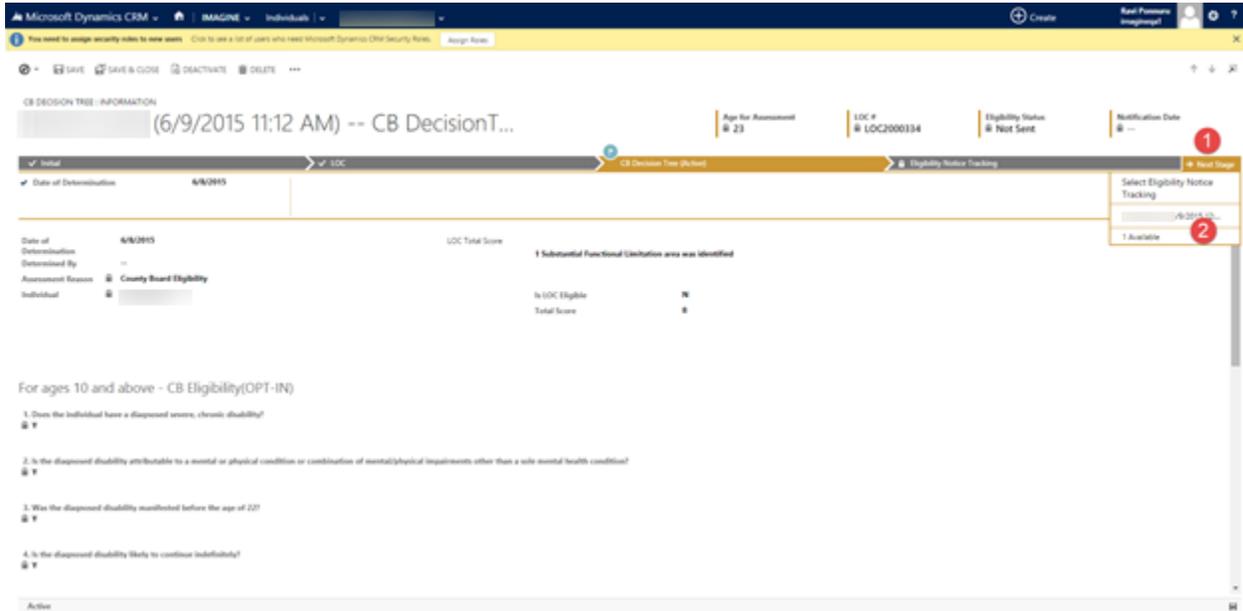
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29. Move to **Eligibility Notice Tracking** stage → by clicking
 1. **“Next Stage”** &
 2. **Select the packet in the list**



30. **Type of Notification** will auto populate per the result of the tool (**Eligible/Yes** on LOC Tool or **Ineligible/No** on the LOC Tool)

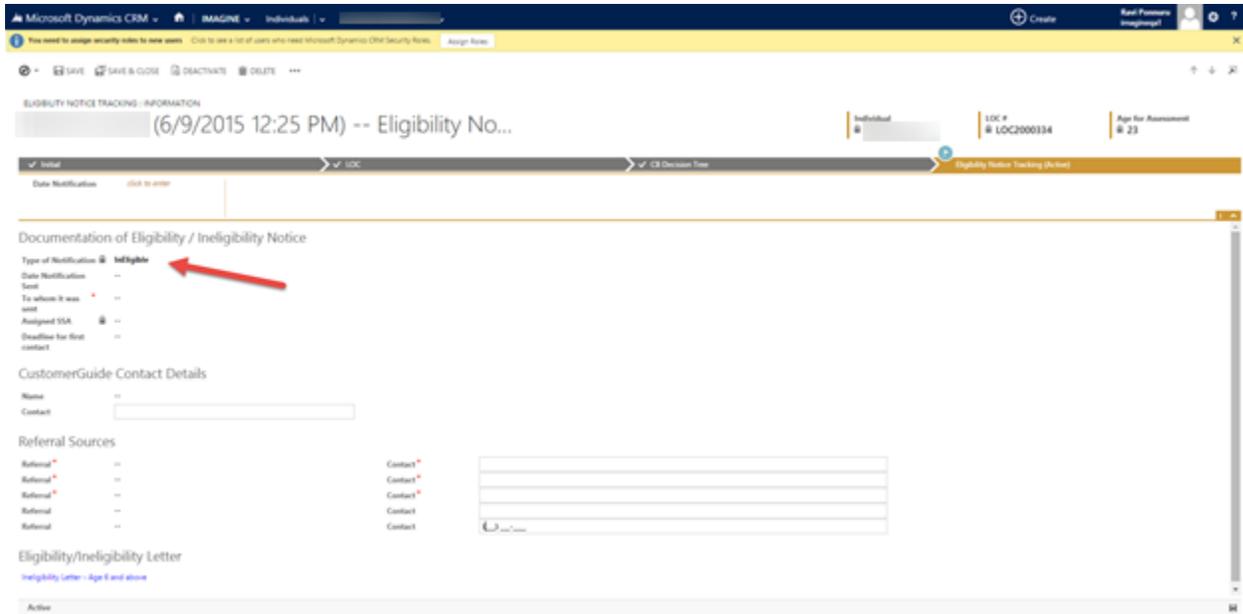


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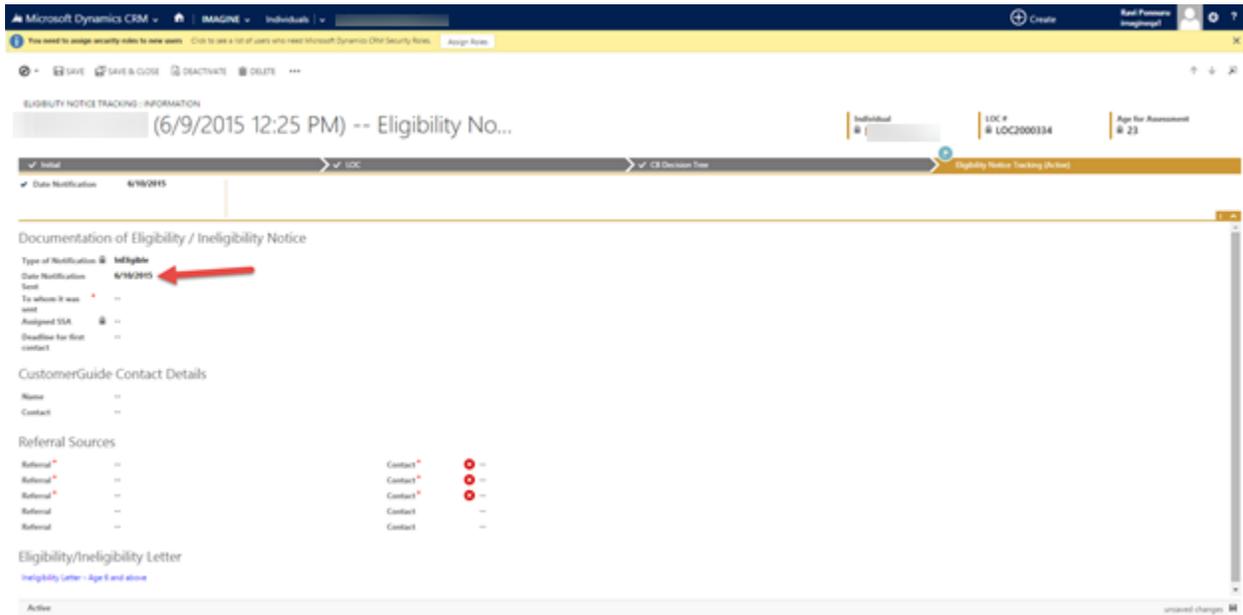
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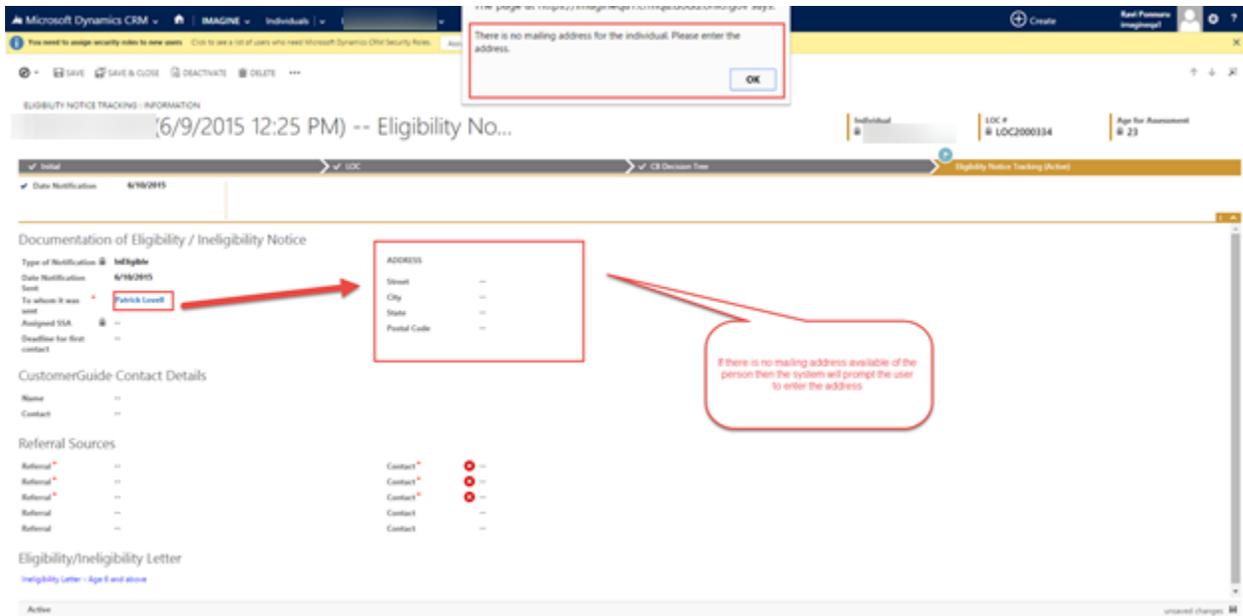


31. Enter **Date notification Sent** – date when you will send this notification to the individual. Not a required field



32. Fill in **To Whom it was sent** by selecting the Individual’s name or individual’s parent or guardian’s name from the option set.





33. **Enter the mailing address** for the individual. Address will be prefilled if individual have a mailing address on his profile. If not, it will prompt you to add mailing address.

34. **Select a Customer Guide** by clicking on the magnifying glass- this will show you list of all customer guide and eligibility specialist in your county.



The screenshot displays the Microsoft Dynamics CRM interface for 'Eligibility Notice Tracking - INFORMATION'. The top navigation bar includes 'Microsoft Dynamics CRM', 'IMAGINE', and 'Individuals'. A yellow banner at the top contains a message: 'You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics CRM Security Roles. Assign Roles.' Below this, there are buttons for 'SAVE', 'SAVE & GO', 'DEACTIVATE', and 'DELETE'. The main content area shows 'ELIGIBILITY NOTICE TRACKING - INFORMATION' with a date '(6/9/2015 12:25 PM) -- Eligibility No...'. A progress bar indicates the current step is 'Eligibility Notice Tracking (Active)'. The 'Documentation of Eligibility / Ineligibility Notice' section includes fields for 'Type of Notification' (Ineligible), 'Date Notification Sent' (6/9/2015), 'To whom it was sent', 'Assigned USA', and 'Deadline for first contact'. The 'ADDRESS' section lists 'Street' (30 East Broad Street), 'City' (Columbus), 'State' (OH), and 'Postal Code' (43016). The 'CustomerGuide Contact Details' section shows a list of contacts with a magnifying glass icon. A red callout box with an arrow pointing to the magnifying glass icon contains the text: 'Click on the Magnifying glass to enter Customer Guide Contact Details.'



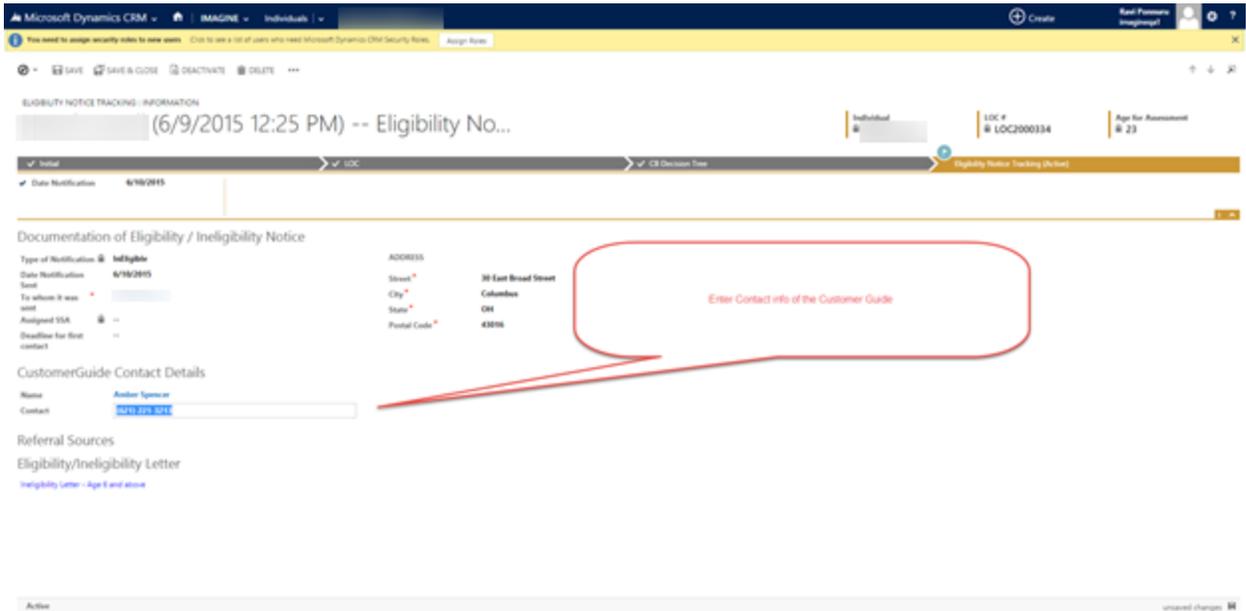
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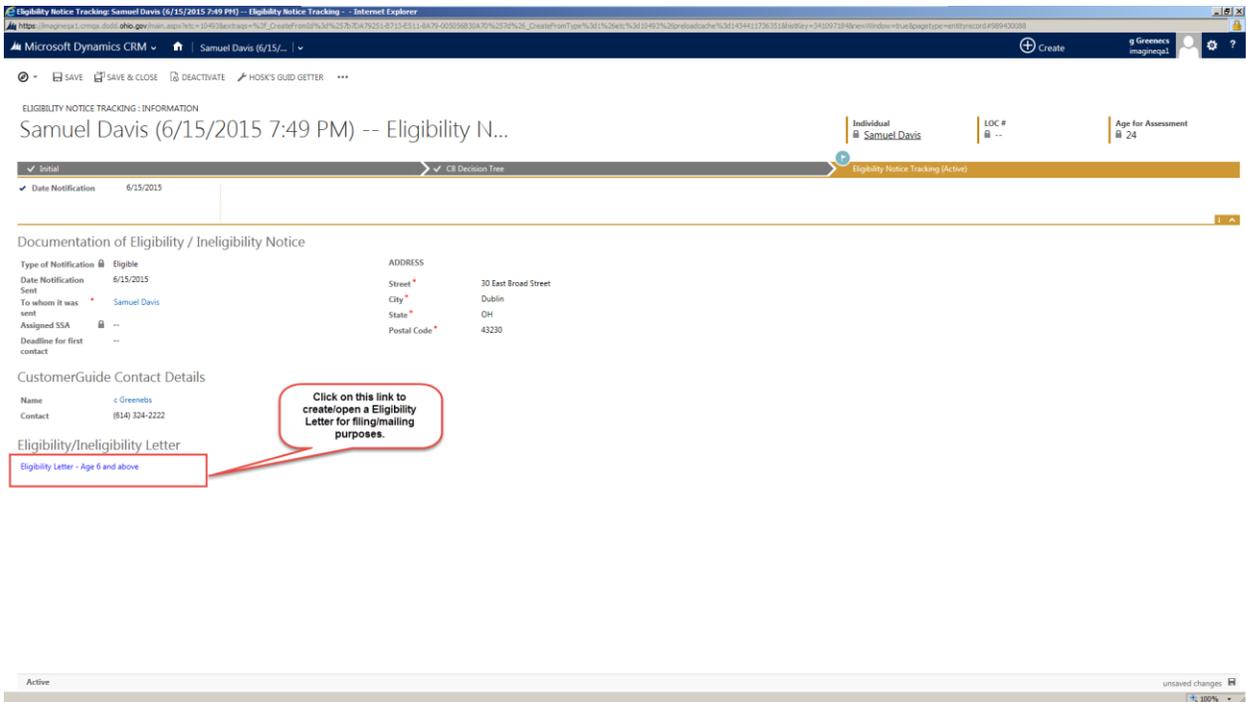
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35. Enter Customer Guide’s contact information



36. Open the **Eligible/Ineligible Notice** by clicking on the link under the Eligibility/Ineligibility Letter Tab



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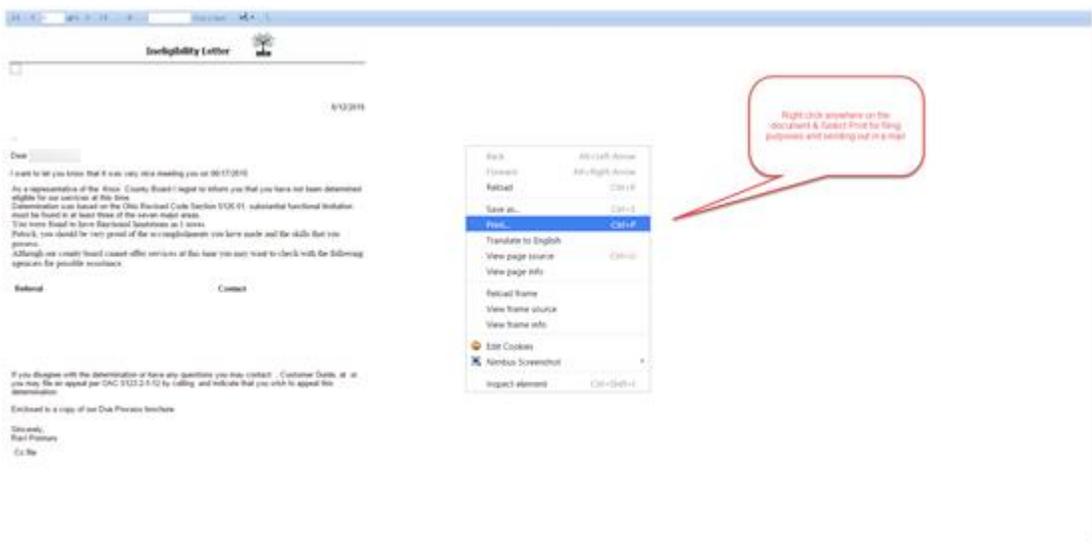


37. Eligible/Ineligible Notice will open in a new tab



38. Right click on your mouse and select print to **Print the Notice**

Note: Counties are not required to use this letter for notification.

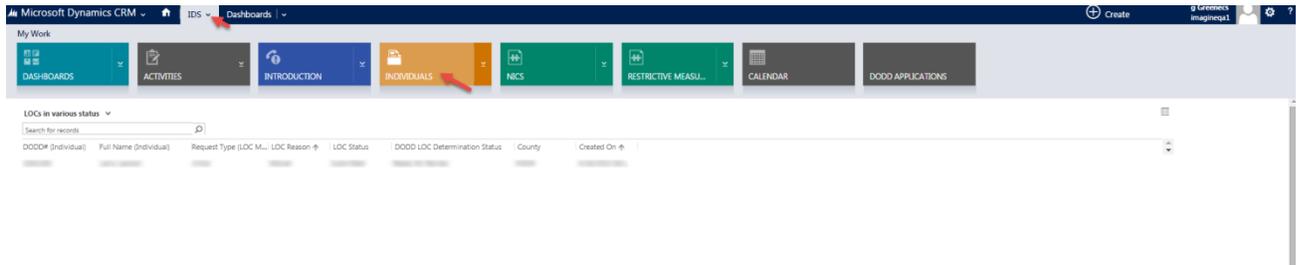


You just completed the County Board eligibility for 10 and above individual as an opt in county.

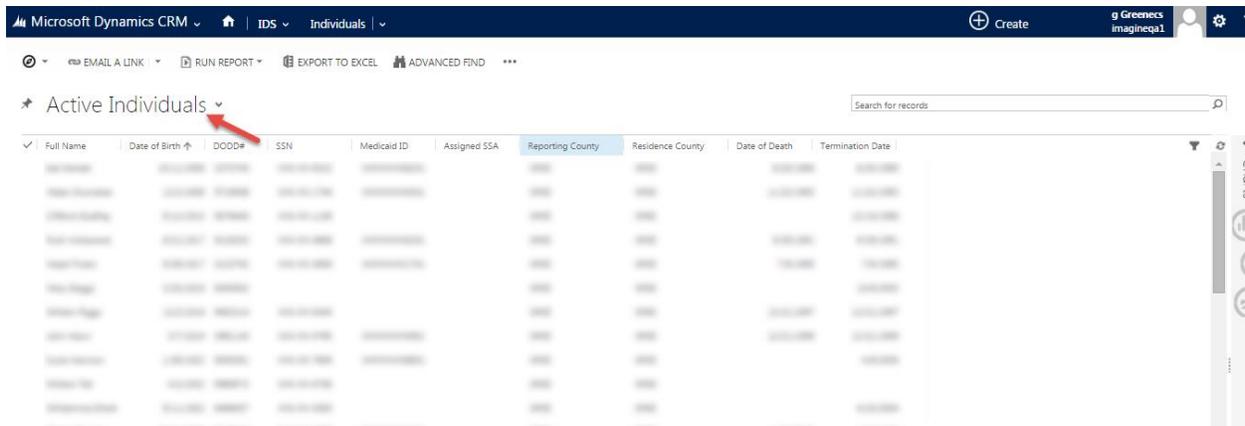


LOC for Waiver Eligibility

1. To access list of individuals in your county → Select **Individual Tile** from dropdown arrow next to IDS/*IMAGINE*



2. You will see list of **Active Individuals in your county**



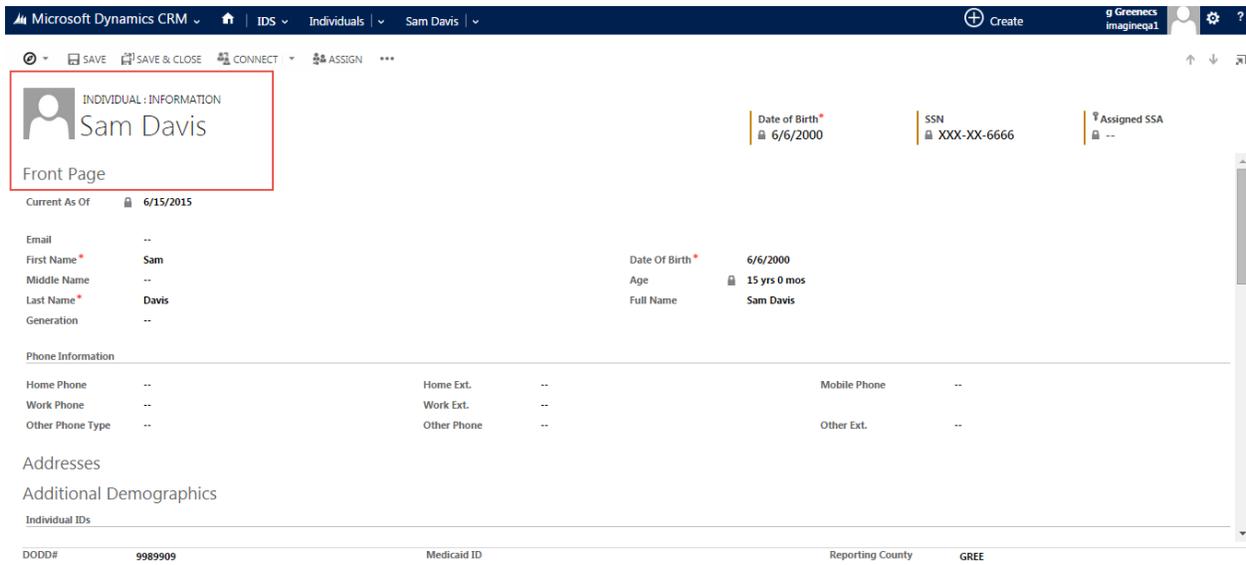
3. **Search for individual** by typing name in search box
4. Hit **Enter** or click on the magnifying glass next to search box
5. **Individual record will show up** if individual exist in your county



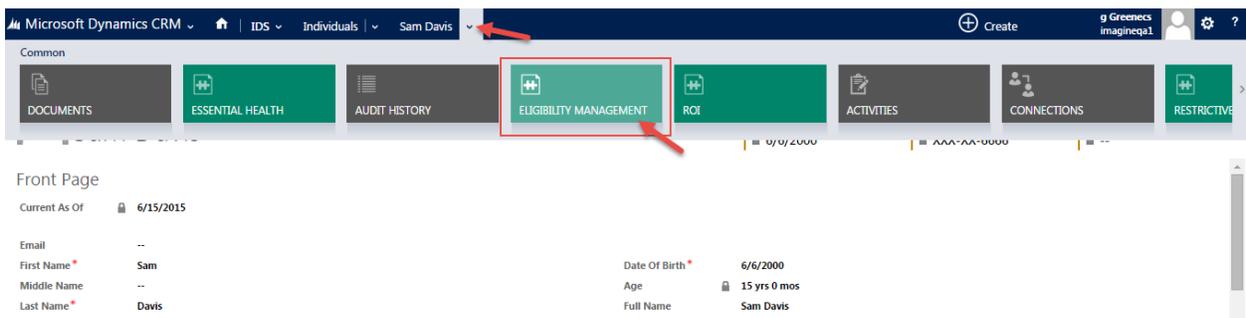


6. Double click on individual record to open individual’s record

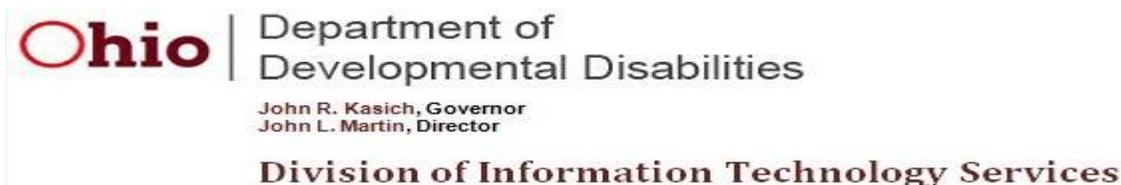
7. User will land on **Individual front page**



8. Start Eligibility Process - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual’s name

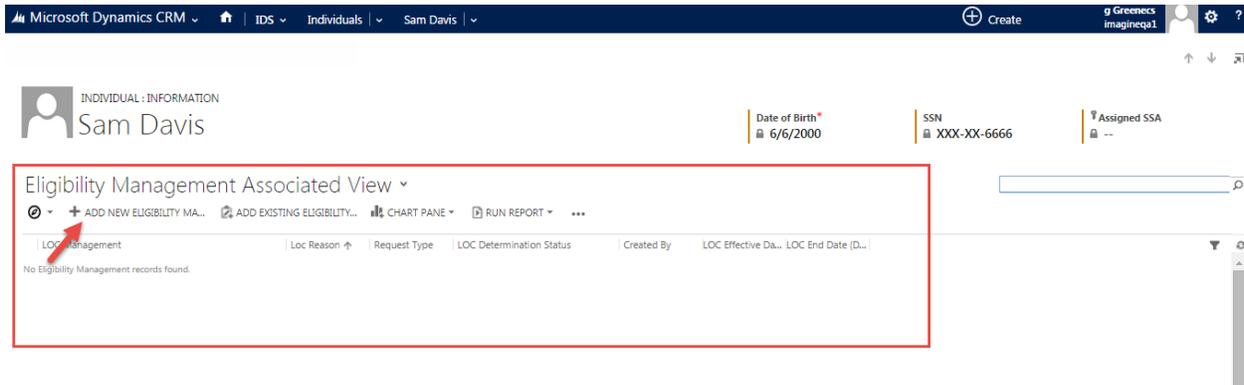


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9. User will land on **Eligibility Management View Page**—you can see all the eligibilities done for that individual

10. Add New Eligibility Management



11. Enter required information on **Initial stage** to Save Eligibility management

1. **Assessment Reason** = select Waiver
2. **Request Type** = Initial
3. **Assigned Evaluator** = click on the magnifying and select the evaluator who will complete the LOC for this individual. You can assign yourself if you will do it
4. **Assessment Date** = can be today's or past date – it's the date when you got this information from individual
5. **Waiver Type** – select the type of waiver you are applying for



Microsoft Dynamics CRM | Eligibility Managem... | Create | g Greenecs imagineq1

SAVE SAVE & CLOSE + NEW DEACTIVATE

ELIGIBILITY MANAGEMENT : INFORMATION

Eligibility Management -- (Sam Davis) ...

Request Type: Initial | LOC Reason: Waiver | DODD#: 9989909

Initial (Active) | LOC | DODD LOC Determination Packet | Next Stage

Eligibility Info	No	Primary Verification	No
GTKYV Scheduled	No		
GTKYV Information	No		

Eligibility Info

Assessment Reason: Waiver 1
 Request Type: Initial 2
 Assigned Evaluator: g Greenecs 3
 Assessment Date (Scheduled/Rescheduled): 6/10/2015 4
 LOC Status: Not Started

Assigned Eligibility Specialist: --
 Waiver Type: IO 5
 Best way to communicate(Preferred Method): --
 Age for Assessment: 15
 Proposed Effective Date: --
 LOC Effective Start Date: --
 LOC Effective End Date: --

INDIVIDUAL DETAILS

Full Name: Sam Davis
 DODD#: 9989909
 Date of Birth: 6/6/2000
 Age: 15 yrs 0 mos
 Email: --
 Reporting County: GREE
 Telephone: --
 Waiver County: --
 Waiver Start Date: --
 Waiver End Date: --
 Individual Waiver Type: --

July 1, 2015



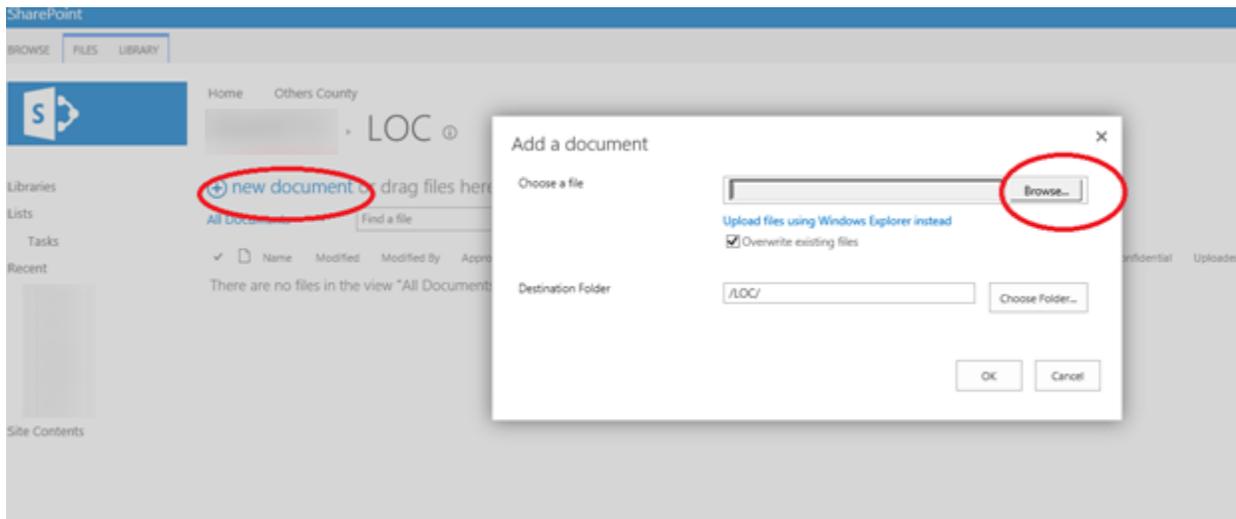
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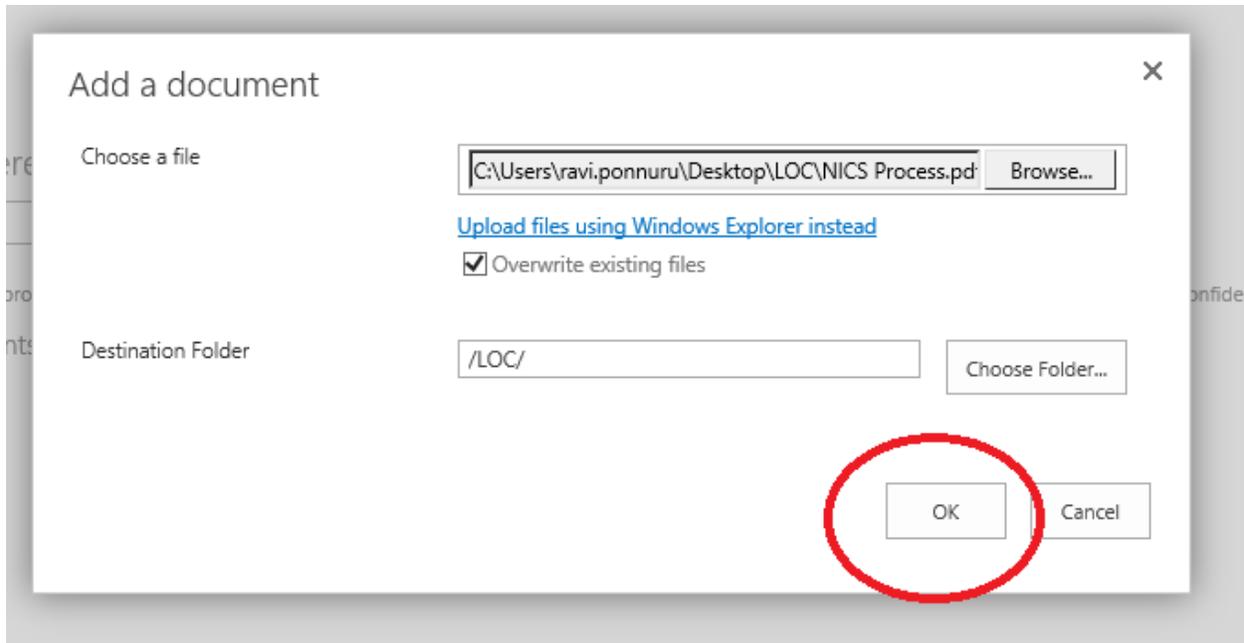
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12. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document** to SharePoint
 1. Click on **+new document**
 2. Click on **chose file**



3. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on “Open” once done selecting
4. You will be back on previous screen → **Click on OK**



5. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
6. **Add Section →** Select “**LOC**” from the option set
7. **Add Category →** Select the reason for what you are uploading the document → in this case it should = **LOC –Waiver**
8. **Check Primary Verification** if this is a Primary Verification document
9. Click **OK** – User will be back on Initial Stage



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EDIT

Check In Cancel Paste Copy Delete Item

Commit Clipboard Actions

A summary of this resource

Section * [dropdown]

Category * Choose Section: [dropdown]

LOC Number [text box]

LOC Status [text box]

Primary Verification

LOC Status

Primary Verification

LOC Number



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13. On top of Initial Stage → Check **Primary Verification** as **YES** – This is a manual check for the user to confirm that user has uploaded the primary verification document to support this LOC

The screenshot shows the Microsoft Dynamics CRM interface for 'Eligibility Management -- (Sam Davis) ...'. The top navigation bar includes 'Microsoft Dynamics CRM', 'Eligibility Managem...', 'Create', and user information 'Greenec Imagineq1'. Below the navigation bar, there are tabs for 'Initial (Active)', 'LOC', and 'DODD LOC Determination Packet'. The 'Initial (Active)' tab is selected, and the 'Primary Verification' field is set to 'Yes'. The 'Request Type' is 'Initial', 'LOC Reason' is 'Waiver', and 'DODD#' is '9989909'. The 'Eligibility Info' section shows 'Assessment Reason' as 'Waiver', 'Request Type' as 'Initial', 'Assigned Evaluator' as 'Greenec', 'Assessment Date' as '6/10/2015', and 'LOC Status' as 'Not Started'. The 'Individual Details' section shows 'Full Name' as 'Sam Davis', 'DODD#' as '9989909', 'Date of Birth' as '6/6/2000', and 'Age' as '15 yrs 0 mos'.



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14. Move to **LOC stage** → by clicking on the “Next Stage” and **Create+** on Next Stage

Microsoft Dynamics CRM | Eligibility Management... | Create | g Greenecs imagineqa1

ELIGIBILITY MANAGEMENT : INFORMATION
Eligibility Management -- (Sam Davis) ...

Request Type* Initial | LOC Reason* Waiver | DODD# 9989909

Initial (Active) | LOC | DODD LOC Determination Packet

Eligibility Info
 GTKYV Scheduled No | Primary Verification Yes
 GTKYV Information No

Eligibility Info
 Assessment Reason* Waiver | Assigned Eligibility Specialist -- | INDIVIDUAL DETAILS
 Request Type* Initial
 Assigned Evaluator* g Greenecs
 Assessment Date (Scheduled/Rescheduled) 6/10/2015 | Waiver Type* IO | Full Name Sam Davis
 LOC Status Not Started | Best way to -- | DODD# 9989909
 Date of Birth* 6/6/2000

1 → Next Stage
 2 Create +

15. User will now be on the LOC tool

Microsoft Dynamics CRM | New LOC | Create | g Greenecs imagineqa1

LOC : INFORMATION
New LOC

LOC Type Initial | Assessment Reason Waiver | LOC Status Not Started | LOC # --

Initial | LOC (Active) | DODD LOC Determination Packet

General
 LOC Type Initial | Assigned Evaluator g Greenecs | INDIVIDUAL DETAILS
 Assessment Reason Waiver
 LOC Status Not Started | Proposed Effective Date -- | Full Name Sam Davis
 Waiver Type* IO | Date of Birth* 6/6/2000
 Date of Assessment 6/15/2015 | Medicaid ID --

No LOC# yet, will be assigned on SAVE



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16. User will view some information that was already entered before and will have a lock symbol next to it, which means they are not editable

The screenshot shows the 'New LOC' form in Microsoft Dynamics CRM. The top navigation bar includes 'Microsoft Dynamics CRM', 'New LOC', and user information 'g Greenecs imagineq1'. Below the navigation bar, there are tabs for 'Initial', 'LOC (Active)', and 'DODD LOC Determination Packet'. The 'LOC (Active)' tab is selected. The form is divided into 'General' and 'INDIVIDUAL DETAILS' sections. In the 'General' section, fields for 'LOC Type' (Initial), 'Assessment Reason' (Waiver), 'LOC Status' (Not Started), 'Waiver Type' (JO), 'Date of Assessment' (6/15/2015), 'Assigned Evaluator' (g Greenecs), and 'Age Used for Assessment' (15) are shown. Red arrows point to the lock icons on these fields, indicating they are not editable. The 'INDIVIDUAL DETAILS' section shows 'Full Name' (Sam Davis), 'Date of Birth' (6/6/2000), 'SSN' (XXX-XX-6666), and 'Medicaid ID' (..).

17. All fields on LOC are REQUIRED to complete LOC

18. Enter the General information on LOC

This screenshot shows the 'New LOC' form with more data entered. In the 'General' section, 'Proposed Effective Date' is now 6/16/2015. In the 'INDIVIDUAL DETAILS' section, 'Date of Birth' is 6/6/2000, 'SSN' is XXX-XX-6666, and 'Medicaid ID' is .. Red arrows point to the 'Verification document' field in the 'Document(s) Reviewed' section, which contains the text 'Verification document'. Other fields in the 'General' section have red arrows pointing to them, indicating they are required or have been entered.

July 1, 2015



19. Save LOC at any time → LOC# is generated on Save

Microsoft Dynamics CRM | Sam Davis-LOC200... | Create | g Greenec imagineqa1

1 SAVE SAVE & CLOSE COMPLETE DEACTIVATE ...

LOC : INFORMATION
Sam Davis-LOC2000365

LOC Type Initial | Assessment Reason Waiver | LOC Status Saved | LOC # LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

General

LOC Type Initial | Assigned Evaluator g Greenec | INDIVIDUAL DETAILS

Assessment Reason Waiver

LOC Status Saved

Waiver Type JO | Proposed Effective Date 6/16/2015

Date of Assessment 6/15/2015

Full Name Sam Davis

Date of Birth 6/6/2000

SSN XXX-XX-6666

20. Add informant by clicking on the + sign on your right hand side (this plus button will appear after saving LOC) → enter informant's name and relationship with individual in the pop up that will appear

Microsoft Dynamics CRM | Sam Davis-LOC2000365 | Create | g Greenec imagineqa1

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

Location of Assessment Home

Age Used for Assessment 15

Informant(LOC)

Informant Relationship

No Informant(LOC) records found.

1 +

Microsoft Dynamics CRM | New Informant(LOC) | Create | g Greenec imagineqa1

SAVE SAVE & CLOSE + NEW DEACTIVATE ...

LOC : INFORMATION
Sam Davis-LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

LOC # LOC2000365

Individual Sam Davis

Informant Mrs. Davis 2

Relationship 3 Mother

Location of Assessment Home

Age Used for Assessment 15

Informant Information

Informant(LOC)

Informant Relationship

Mrs. Davis Mother



LOC : INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | LOC Status: Saved | LOC #: LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

Location of Assessment: Home
Age Used for Assessment: 15

Informant Information
Informant(LOC)
Informant: Mrs. Davis | Relationship: Mother

21. Evaluator will see LOC questions as per Individual’s Age of Assessment (9 and below or 10 and above)

Microsoft Dynamics CRM | Sam Davis-LOC200... | Create | g Greenecs imagineq1

SAVE | SAVE & CLOSE | COMPLETE | DEACTIVATE

LOC : INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | LOC Status: Saved | LOC #: LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

Ages 10 and above

LOC Questions as per Individual's age

C. Ages 10 and above

Does the clinician's verification form indicate the individual has a diagnosed severe, chronic disability?
* Y

Does the clinician's verification form indicate the diagnosed disability is attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?
* Y

Does the clinician's verification form indicate the diagnosed disability was manifested before the age of 22?
* Y

Does the clinician's verification form indicate the diagnosed disability is likely to continue indefinitely?
* Y

2. Areas of Major Life Activity
A. Self-care



22. Answer all questions

Microsoft Dynamics CRM | Sam Davis-LOC200365 | Create | g Greenecs imagineq1

SAVE SAVE & CLOSE COMPLETE DEACTIVATE

LOC: INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | LOC Status: Saved | LOC #: LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

Ages 10 and above

C. Ages 10 and above

Does the clinician's verification form indicate the individual has a diagnosed severe, chronic disability?

* Y

Does the clinician's verification form indicate the diagnosed disability is attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?

* Y

Does the clinician's verification form indicate the diagnosed disability was manifested before the age of 22?

* Y

Does the clinician's verification form indicate the diagnosed disability is likely to continue indefinitely?

* Y

2. Areas of Major Life Activity

A. Self-care

Microsoft Dynamics CRM | Sam Davis-LOC200365 | Create | g Greenecs imagineq1

SAVE SAVE & CLOSE COMPLETE DEACTIVATE

LOC: INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | LOC Status: Saved | LOC #: LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

2. Areas of Major Life Activity

A. Self-care

1. The individual is able to cleanse one's body by bathing, showering, sponge bath, or other generally acceptable method. The assessor should not consider the individual's ability to transfer in/out of the tub/shower or how well the individual cleanses self during the toileting process. These areas are addressed in other sections.

* With the assistance of another person to complete the task

2. The individual is able to complete oral hygiene (tooth-brushing, denture care, etc.) tasks

* The activity must be performed by another person on the individual's behalf

3. The individual is able to perform tasks related to hair care (brushing, styling, etc.)

* With the assistance of another person to complete the task

4. The individual is able to perform nail care tasks (cleaning, trimming, etc.)

* Please select one

5. The individual is able to perform nail care tasks (cleaning, trimming, etc.)

* With the assistance of another person to complete the task

6. The individual is able to apply deodorant



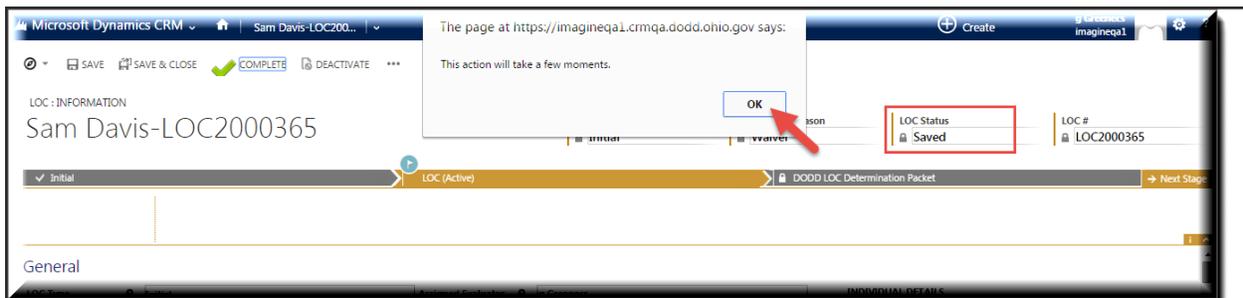
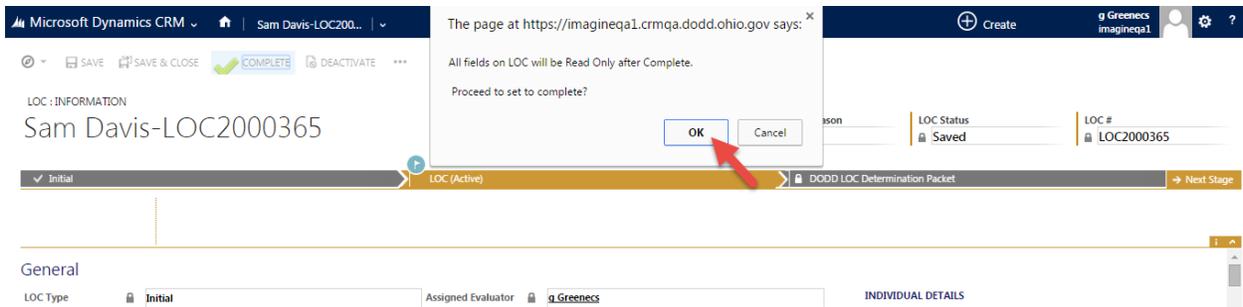
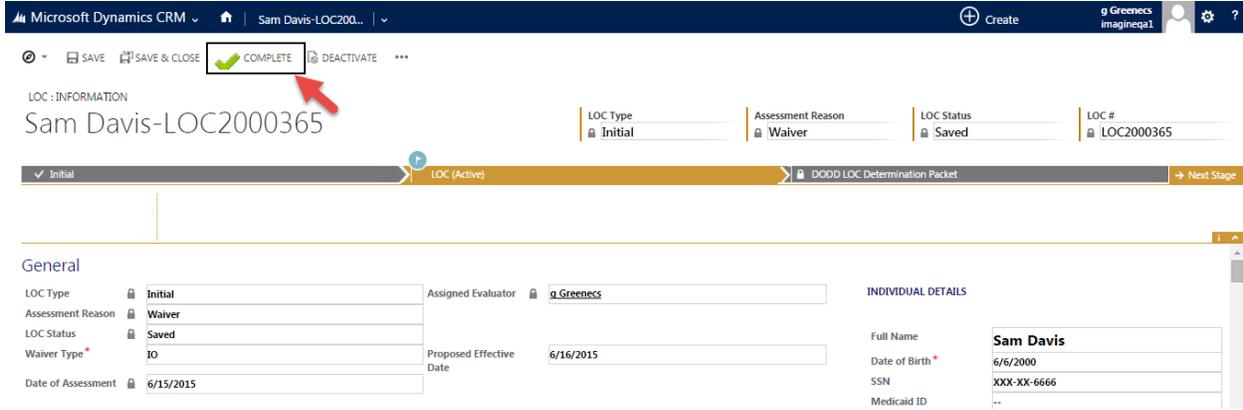
Department of
Developmental Disabilities

John R. Kasich, Governor
John L. Martin, Director

Division of Information Technology Services



23. Complete LOC by clicking on the “Complete” button; once all information on LOC is entered



24. Once LOC is Completed → LOC becomes read only; user will see the lock symbol next to all the fields and cannot edit anything now.

Microsoft Dynamics CRM | Sam Davis-LOC200... | Create | g Greenecs imagineq1

LOC : INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | **LOC Status: Completed** | LOC #: LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

General

LOC Type: Initial | Assigned Evaluator: g Greenecs | **INDIVIDUAL DETAILS**

Assessment Reason: Waiver | LOC Status: **Completed**

LOC Status: Completed | Waiver Type: JO | Proposed Effective Date: 6/16/2015

Date of Assessment: 6/15/2015

Document(s) Reviewed: Verification document | **Cannot edit anything on LOC**

Location of Assessment: Home | Age Used for Assessment: 15

Full Name: Sam Davis
Date of Birth: 6/6/2000
SSN: XXX-XX-6666
Medicaid ID: ..

Microsoft Dynamics CRM | Sam Davis-LOC200... | Create | g Greenecs imagineq1

LOC : INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | **LOC Status: Completed** | LOC #: LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

Does the clinician's verification form indicate the diagnosed disability is attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?
Y

Does the clinician's verification form indicate the diagnosed disability was manifested before the age of 22?
Y

Does the clinician's verification form indicate the diagnosed disability is likely to continue indefinitely?
Y

2. Areas of Major Life Activity

A. Self-care

1. The individual is able to cleanse one's body by bathing, showering, sponge bath, or other generally acceptable method. The assessor should not consider the individual's ability to transfer in/out of the tub/shower or how well the individual cleanses self during the toileting process. These areas are addressed in other sections.
With the assistance of another person to complete the task

2. The individual is able to complete oral hygiene (tooth-brushing, denture care, etc.) tasks

July 1, 2015



25. View Score per Section (major life area) after LOC is Completed

Microsoft Dynamics CRM | Sam Davis-LOC200... | Create | g Greenecs imagineq1

LOC: INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | **LOC Status: Completed** | LOC #: LOC2000365

Initial | **LOC (Active)** | DODD LOC Determination Packet | Next Stage

Self-care Score

Substantial Functional Limitation	Y
Score	33

B. Receptive and Expressive Language

1. The individual is able to express needs and wants in a manner that is understandable to people who do not know the individual using spoken, written, signed, electronic, or mechanical means

* With the assistance of another person

2. The individual is able to understand people who communicate through spoken, written, signed, electronic, or mechanical means

* The activity must be performed by another person on the individual's behalf

Receptive and Expressive Language Score

Substantial Functional Limitation	Y
Score	10

26. View LOC Summary after LOC is Completed

Microsoft Dynamics CRM | Sam Davis-LOC200... | Create | g Greenecs imagineq1

LOC: INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | **LOC Status: Completed** | LOC #: LOC2000365

Initial | **LOC (Active)** | DODD LOC Determination Packet | Next Stage

LOC Summary (Ages 10 and above)

- Does the clinician's verification form indicate the individual has a diagnosed severe, chronic disability? Y
- Does the clinician's verification form indicate the diagnosed disability is attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition? Y
- Does the clinician's verification form indicate the diagnosed disability was manifested before the age of 22? Y
- Does the clinician's verification form indicate the diagnosed disability is likely to continue indefinitely? Y
- The disability results in substantial functional limitations in at least three of the following areas:
 - Self-care Y
 - Expressive/receptive communication Y
 - Learning Y
 - Mobility Y
 - Self-direction Y
 - Capacity for independent living Y
 - Economic self-sufficiency (N/A for individuals below age 16) Y



27. View LOC Eligible = YES/NO after LOC is Completed

Microsoft Dynamics CRM | Sam Davis-LOC2000365

LOC : INFORMATION
 Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | LOC Status: Completed | LOC #: LOC2000365

Initial | **LOC (Active)** | DODD LOC Determination Packet | Next Stage

LOC Total Score

7 Substantial Functional Limitation areas were identified

Is LOC Eligible? Y
 Total Score 130

28. Complete Attestation – 2399 and PICT by clicking on the attestation record at the bottom of the LOC, under the Attestation Tab on LOC

Microsoft Dynamics CRM | Sam Davis-LOC2000365

LOC : INFORMATION
 Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | LOC Status: Completed | LOC #: LOC2000365

Initial | **LOC (Active)** | DODD LOC Determination Packet | Next Stage

Attestation/Recommendation

LOC Reason	Recommendation	Attestation2399	AttestationPICT	AttestationCF	Status	Created On
Waiver	YES	NO	NO	NO	Active	6/15/2015 6:42 PM

1 Click anywhere here to open attestation



29. Attestation will open in a new window → check mark both PICT and 2399 → Click on Save and Close (on the top of this screen)

Microsoft Dynamics CRM | Sam Davis (6/15/2015 6:42 PM) -- Att...

LOC Type: Initial | LOC Reason: Waiver | LOC: Sam Davis-LOC2000365 | LOC #: LOC2000365

Assessor Recommendation

Based upon a review of the diagnosis and functional assessment information, I recommend that the individual meets criteria for a developmental disabilities level of care.

YES

Attestations required for HCBS enrollment

I attest to the following by checking the associated box and affixing my electronic signature:

A 2399 has been submitted to the county department of job and family services.
Please attest: 2

The individual's name has been included on the PICT for waiver enrollment.
Please attest: 3

I am a person who coordinates or performs evaluations of individuals to make a recommendation to the department whether or not the individual meets the criteria for a developmental disabilities level of care. I have completed the required department-approved training for recommending level of care.

Electronic Signature: g Greenecs



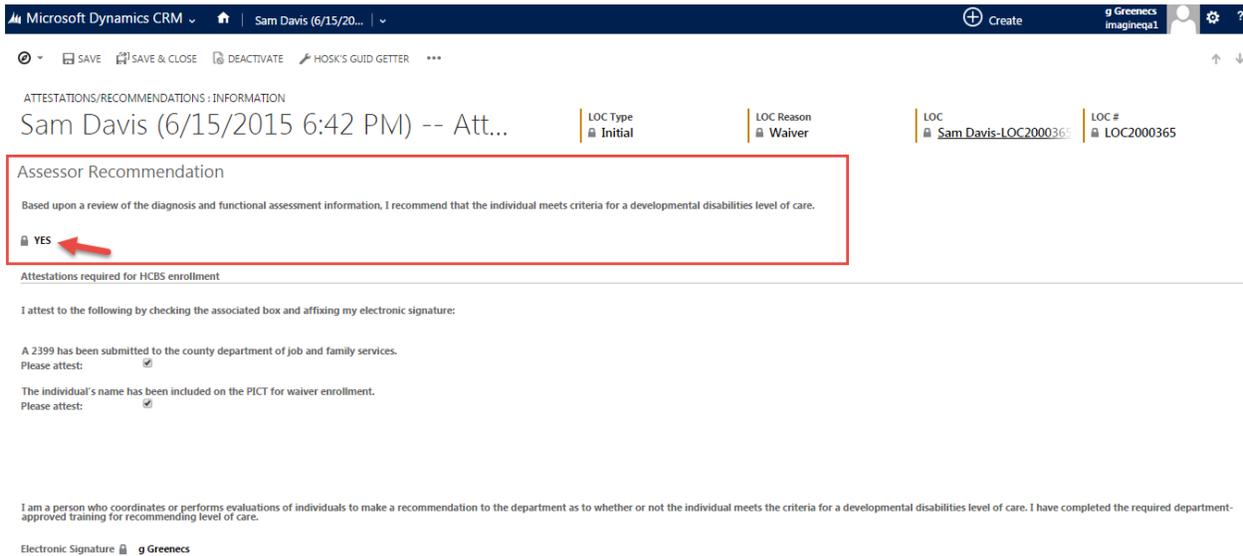
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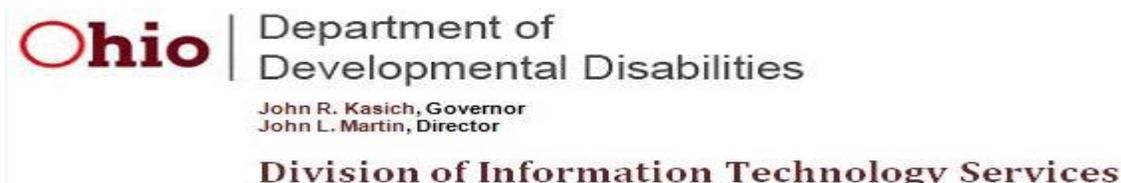
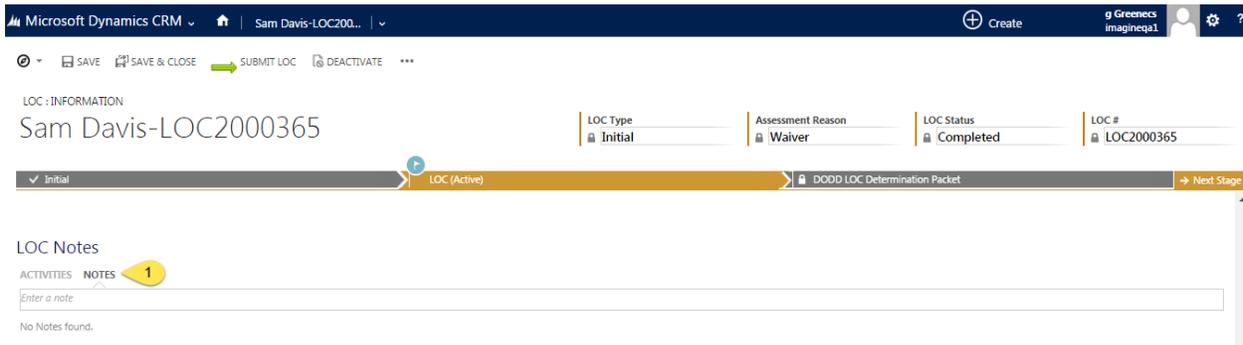
Division of Information Technology Services



30. Assessor Recommendation will auto populate based on the result of the LOC and cannot be edited by the Evaluator. If LOC Eligible = YES, assessor recommendation will = YES; if LOC Eligible = NO, assessor recommendation will = NO. Evaluator can view this on the attestation screen.



31. Add notes for LOC if needed – this is not required field. Scroll down at the bottom of the page, you will see **LOC Notes tab** below Attestation tab. Click on Notes to enter “Notes”.



Enter notes and click on DONE

Microsoft Dynamics CRM | Sam Davis-LOC2000365 | Create | g Greenecs imagineq1

LOC : INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | LOC Status: Completed | LOC #: LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

LOC Notes

ACTIVITIES | NOTES

Title
Need more assistance in Mobility.
Please see attached document for details.

Attach | Done

No Notes found.

Can also attach a document with the notes

Microsoft Dynamics CRM | Sam Davis-LOC2000365 | Create | g Greenecs imagineq1

LOC : INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | LOC Status: Completed | LOC #: LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

LOC Notes

ACTIVITIES | NOTES

Attach | Done

Microsoft Dynamics CRM | Sam Davis-LOC2000365 | Create | g Greenecs imagineq1

LOC : INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | LOC Status: Completed | LOC #: LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet | Next Stage

LOC Notes

ACTIVITIES | NOTES

Enter a note

Choose File | Provider Access.pdf | Done

Chrysanthemum.jpg
You - Just now

Need more assistance in Mobility.
Please see attached document for details.
You - Just now



32. Submit LOC to DODD by clicking on the Submit button available on top of the LOC stage.

Checklist before clicking on submit button:

- 1) Filled in required information on initial stage
- 2) Uploaded individual's primary verification and other supporting documents to SharePoint
- 3) Entered all required information on LOC Tool and answered all questions
- 4) Added informant
- 5) View LOC summary from the LOC tool
- 6) Complete the required attestation for Waiver
- 7) Add notes for LOC if needed
- 8) Click on the SUBMIT button**

Microsoft Dynamics CRM | Sam Davis-LOC200... | Create | Greenecs imagineqa1

SAVE SAVE & CLOSE **SUBMIT LOC** DEACTIVATE ...

LOC: INFORMATION
Sam Davis-LOC2000365

LOC Type: Initial | Assessment Reason: Waiver | LOC Status: Completed | LOC #: LOC2000365

Initial | LOC (Active) | DODD LOC Determination Packet

General

LOC Type	Initial	Assigned Evaluator	Greenecs	INDIVIDUAL DETAILS
Assessment Reason	Waiver			Full Name
LOC Status	Completed			Sam Davis
Waiver Type *	IO	Proposed Effective Date	6/16/2015	Date of Birth *
Date of Assessment	6/15/2015			6/6/2000
				SSN
				XXX-XX-6666

You have successfully submitted the LOC to DODD; once DODD has processed the LOC, you will receive an alert for status updates and/or approval.



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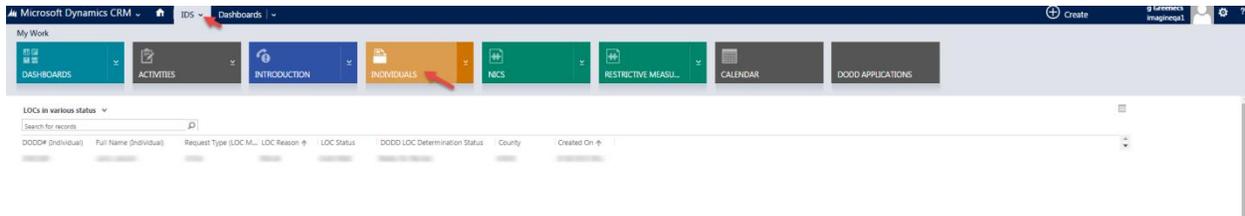
Division of Information Technology Services

JULY 1, 2015

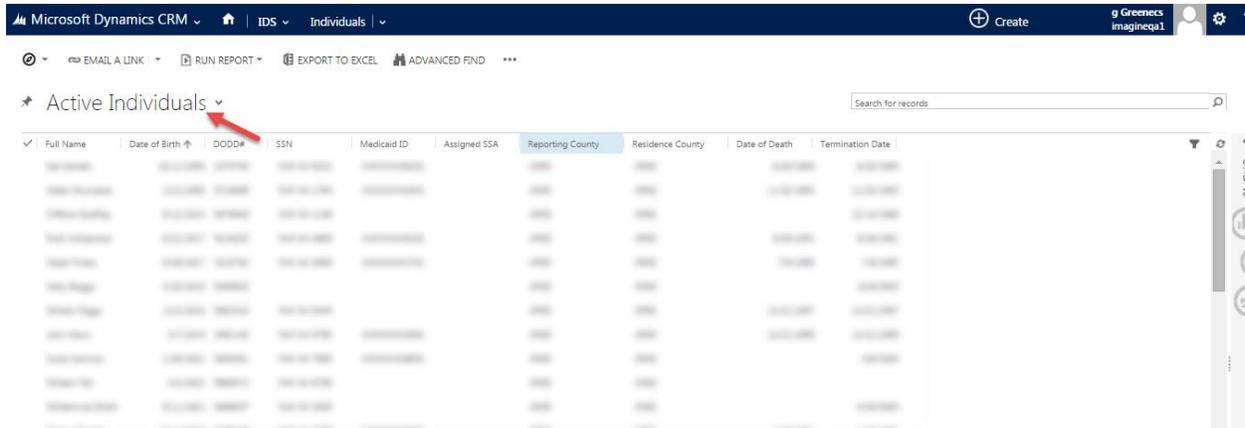


Waiver NICS (Notification of Individual's Change in Status) Waiver County Transfer NICS

1. To access list of individuals in your county → Select **Individual Tile** from dropdown arrow next to IDS/iMAGINE



2. You will see list of **Active Individuals in your county**



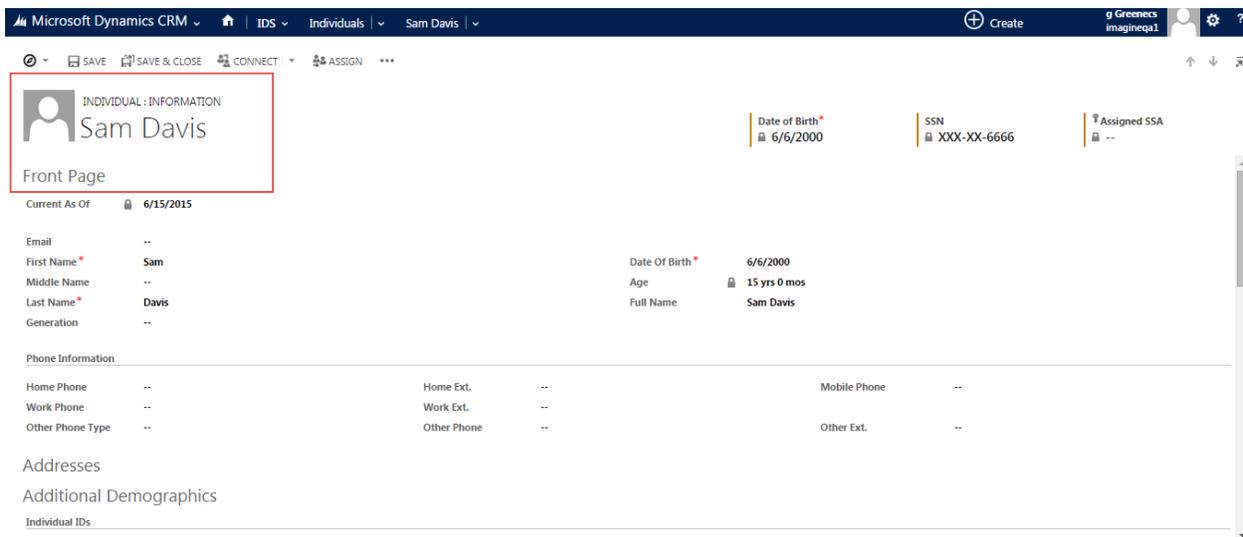
3. **Search for individual** by typing name in search box
4. Hit **Enter** or click on the magnifying glass next to search box
5. **Individual record will show up** if individual exist in your county



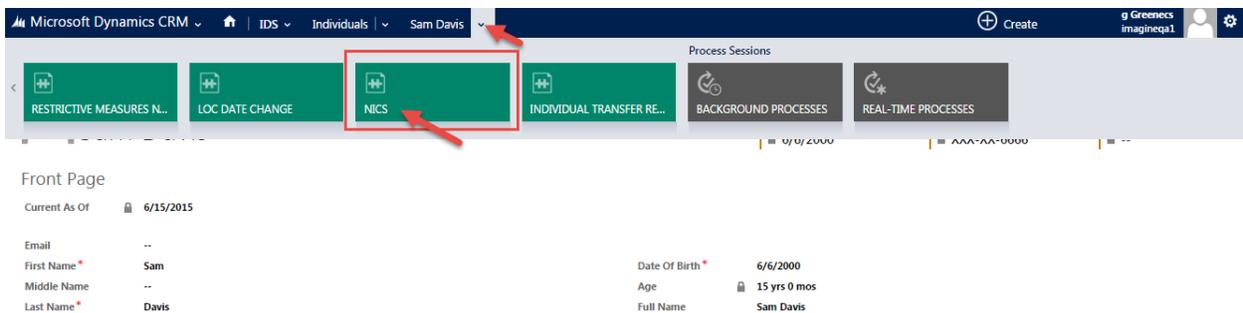


6. Double click on individual record to open individual’s record

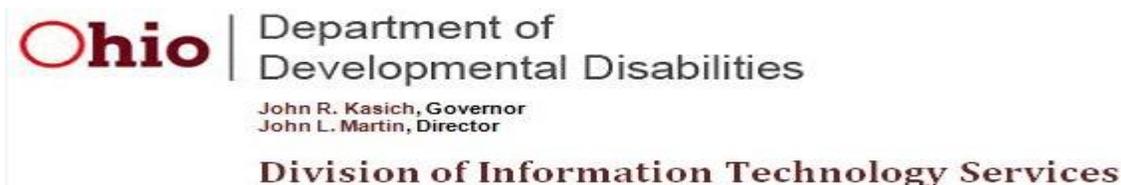
7. User will land on **Individual front page**



8. Look and Click on the **NICS Tile** from the dropdown arrow next to individual ‘s name



9. User will land on **NICS View Page**—you can see all the eligibilities done for that individual

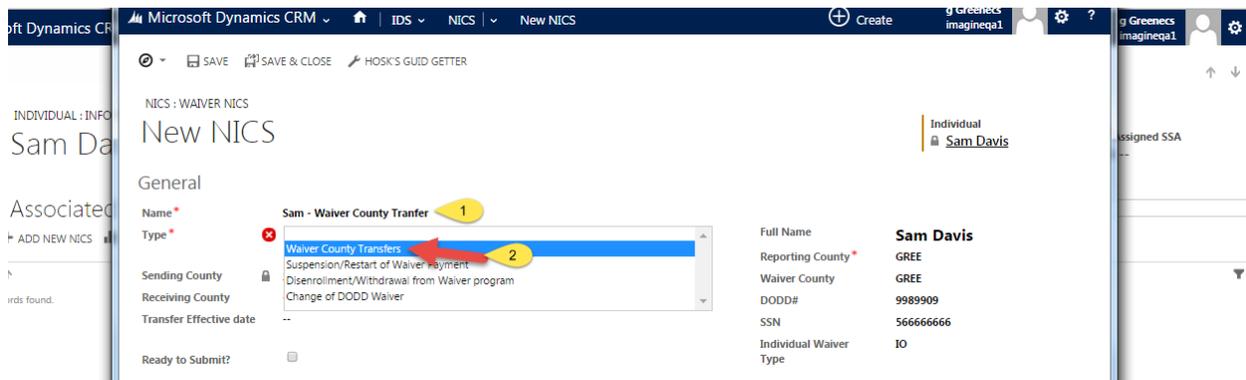


10. Add New NICS



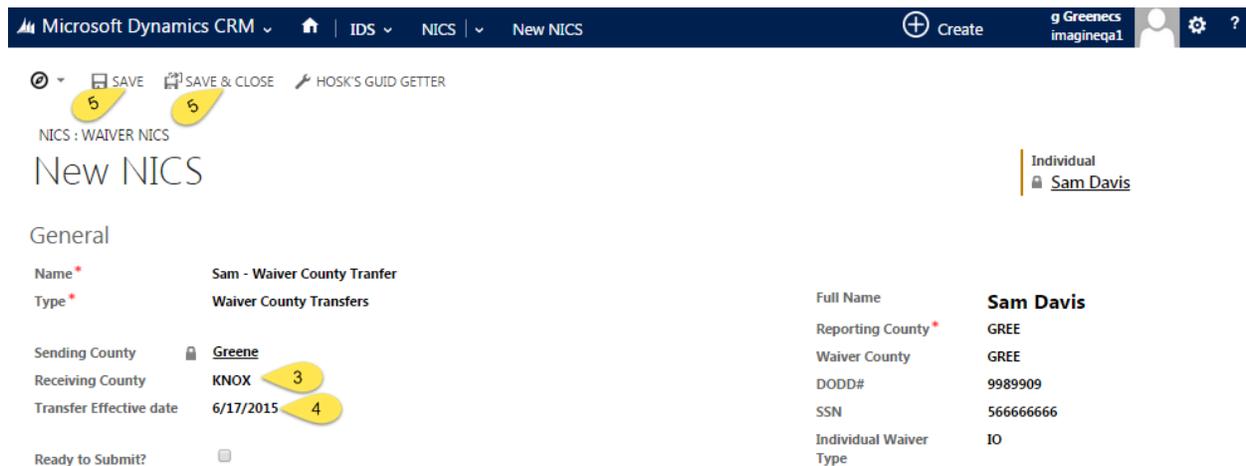
11. Add a Name for your NICS

12. Type of NICS = Waiver County Transfer NICS



13. Enter all Required Information

14. SAVE or SAVE and CLOSE at any time



15. After save – NICS Name will display on top of this NICS form

Microsoft Dynamics CRM | IDS | NICS | Sam - Waiver Count... | Create | g Greenecs imagineq1

SAVE | SAVE & CLOSE | HOSK'S GUID GETTER

NICS : WAIVER NICS
Sam - Waiver County Transfer

Individual
 Sam Davis

General

Name* **Sam - Waiver County Transfer**
 Type* **Waiver County Transfers**

Sending County* **Greene**
 Receiving County* **KNOX**
 Transfer Effective date **6/17/2015**

Ready to Submit?

Full Name **Sam Davis**
 Reporting County* **GREE**
 Waiver County **GREE**
 DODD# **9989909**
 SSN **566666666**
 Individual Waiver Type **IO**

Before SAVE

Microsoft Dynamics CRM | IDS | NICS | New NICS | Create | g Greenecs imagineq1

SAVE | SAVE & CLOSE | HOSK'S GUID GETTER

NICS : WAIVER NICS
New NICS

Individual
 Sam Davis

General

Name* **Sam - Waiver County Transfer**
 Type* **Waiver County Transfers**

Sending County* **Greene**
 Receiving County* **KNOX**
 Transfer Effective date **6/17/2015**

Ready to Submit?

Full Name **Sam Davis**
 Reporting County* **GREE**
 Waiver County **GREE**
 DODD# **9989909**
 SSN **566666666**
 Individual Waiver Type **IO**

16. Once ready to Submit → Check mark the checkbox next to Submit and click on Save



Microsoft Dynamics CRM | Home | IDS | NICS | Sam - Waiver Count... | Create | g Greenecs imagineqa1

NICS : WAIVER NICS

Sam - Waiver County Transfer

Individual | Sam Davis

General

Name	Sam - Waiver County Transfer	Full Name	Sam Davis
Type	Waiver County Transfers	Reporting County	GREE
Sending County	Greene	Waiver County	GREE
Receiving County	KNOX	DODD#	9989909
Transfer Effective date	6/17/2015	SSN	566666666
Ready to Submit?	<input checked="" type="checkbox"/>	Individual Waiver Type	IO

17. NICS Submitted to DODD

The page at https://imagineqa1.crmqa.dodd.ohio.gov says: x

NICS request has been submitted!

OK

Microsoft Dynamics CRM | Home | IDS | NICS | Sam - Waiver Count... | Create | g Greenecs imagineqa1

NICS : WAIVER NICS

Sam - Waiver County Transfer

Individual | Sam Davis

General

Name	Sam - Waiver County Transfer	Full Name	Sam Davis
Type	Waiver County Transfers	Reporting County	GREE
Sending County	Greene	Waiver County	GREE
Receiving County	KNOX	DODD#	9989909
Transfer Effective date	6/17/2015	SSN	566666666
Ready to Submit?	<input checked="" type="checkbox"/>	Individual Waiver Type	IO

18. All fields on **NICS will be read only**; user will see the lock symbol next to all the fields and cannot edit anything now



The screenshot shows the Microsoft Dynamics CRM interface for a 'Waiver NICS' record. The record title is 'Sam - Waiver County Transfer'. The 'General' section contains the following fields:

Name	Sam - Waiver County Transfer
Type	Waiver County Transfers
Sending County	Greene
Receiving County	KNOX
Transfer Effective date	6/17/2015
Waiver NICS Status	Ready to Review

An orange callout box points to the 'Ready to Review' status with the text: 'Ready to Review for DODD'. To the right, the individual's details are shown:

Full Name	Sam Davis
Reporting County	GREE
Waiver County	GREE
DODD#	9989909
SSN	56666666
Individual Waiver Type	IO

You successfully submitted a Waiver NICS to DODD



Department of
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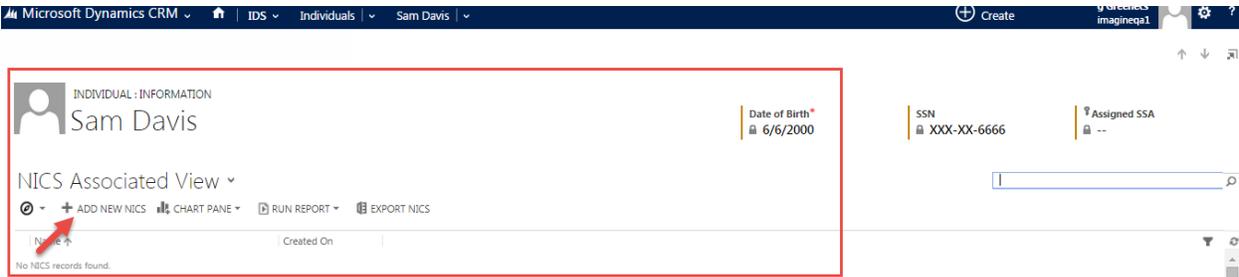
Division of Information Technology Services

July 1, 2015



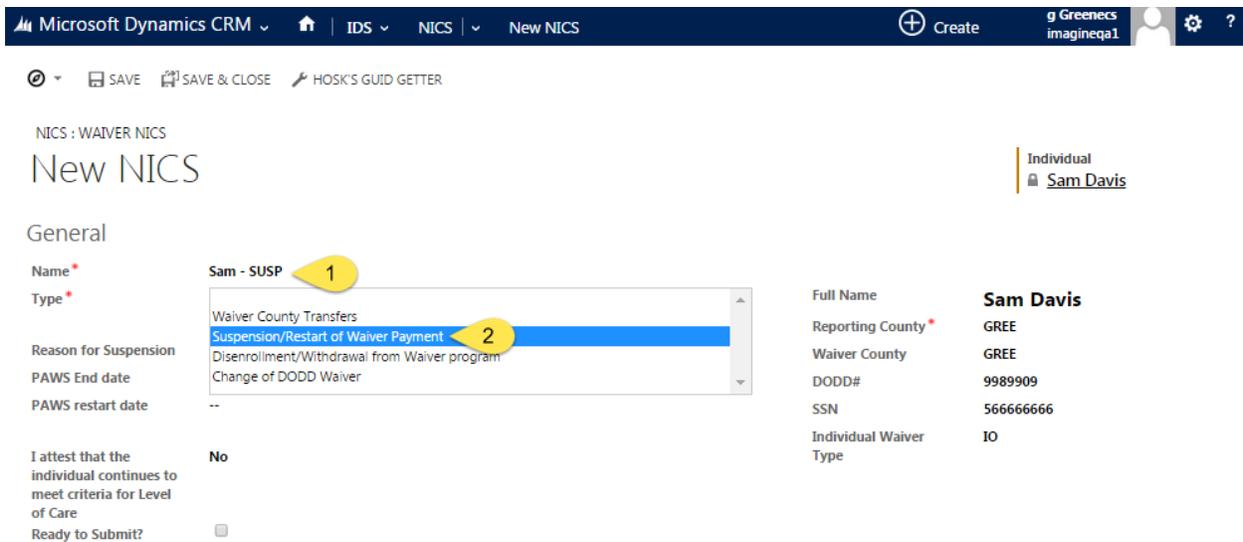
Suspension/Restart of Waiver Program NICS

1. Add New NICS



2. Add a Name for your NICS

3. Select Type of NICS = Suspension/Restart of Waiver Payment NICS



4. Enter all Required Information

5. SAVE or SAVE and CLOSE at any time

Microsoft Dynamics CRM | Home | IDS | NICS | New NICS | Create | g Greenecs imagineqa1

SAVE SAVE & CLOSE HOSK'S GUID GETTER

NICS: WAIVER NICS

New NICS

Individual
Sam Davis

General

Name * Sam - SUSP
Type * Suspension/Restart of Waiver Payment

Reason for Suspension Hospital
PAWS End date 6/17/2015
PAWS restart date 6/20/2015

I attest that the individual continues to meet criteria for Level of Care
No
Yes (selected)
Ready to Submit?

Full Name Sam Davis
Reporting County * GREE
Waiver County GREE
DODD# 9989909
SSN 566666666
Individual Waiver Type IO

6. Once ready to Submit → Check mark the checkbox next to **Submit** and click on Save

Microsoft Dynamics CRM | Home | IDS | NICS | Sam - SUSP | Create | g Greenecs imagineqa1

SAVE SAVE & CLOSE HOSK'S GUID GETTER

NICS: WAIVER NICS

Sam - SUSP

Individual
Sam Davis

General

Name * Sam - SUSP
Type * Suspension/Restart of Waiver Payment

Reason for Suspension Hospital
PAWS End date 6/17/2015
PAWS restart date 6/20/2015

I attest that the individual continues to meet criteria for Level of Care
Yes
Ready to Submit?

Full Name Sam Davis
Reporting County * GREE
Waiver County GREE
DODD# 9989909
SSN 566666666
Individual Waiver Type IO



7. NICS Submitted to DODD

The screenshot displays a Microsoft Dynamics CRM window. A modal dialog box is open in the center, titled "The page at https://imagineqa1.crmqa.dodd.ohio.gov says:", containing the message "NICS request has been submitted!" and an "OK" button. A red arrow points to the "OK" button. The background CRM interface shows a record for "Sam - SUSP" with the following details:

Name	Sam - SUSP	Full Name	Sam Davis
Type	Suspension/Restart of Waiver Payment	Reporting County	GREE
Reason for Suspension	Hospital	Waiver County	GREE
PAWS End date	6/17/2015	DODD#	9989909
PAWS restart date	6/20/2015	SSN	566666666
I attest that the individual continues to meet criteria for Level of Care	Yes	Individual Waiver Type	IO
Ready to Submit?	<input checked="" type="checkbox"/>		

8. All fields on **NICS will be read only**; user will see the lock symbol next to all the fields and cannot edit anything now
 You **successfully submitted a Waiver NICS to DODD.**



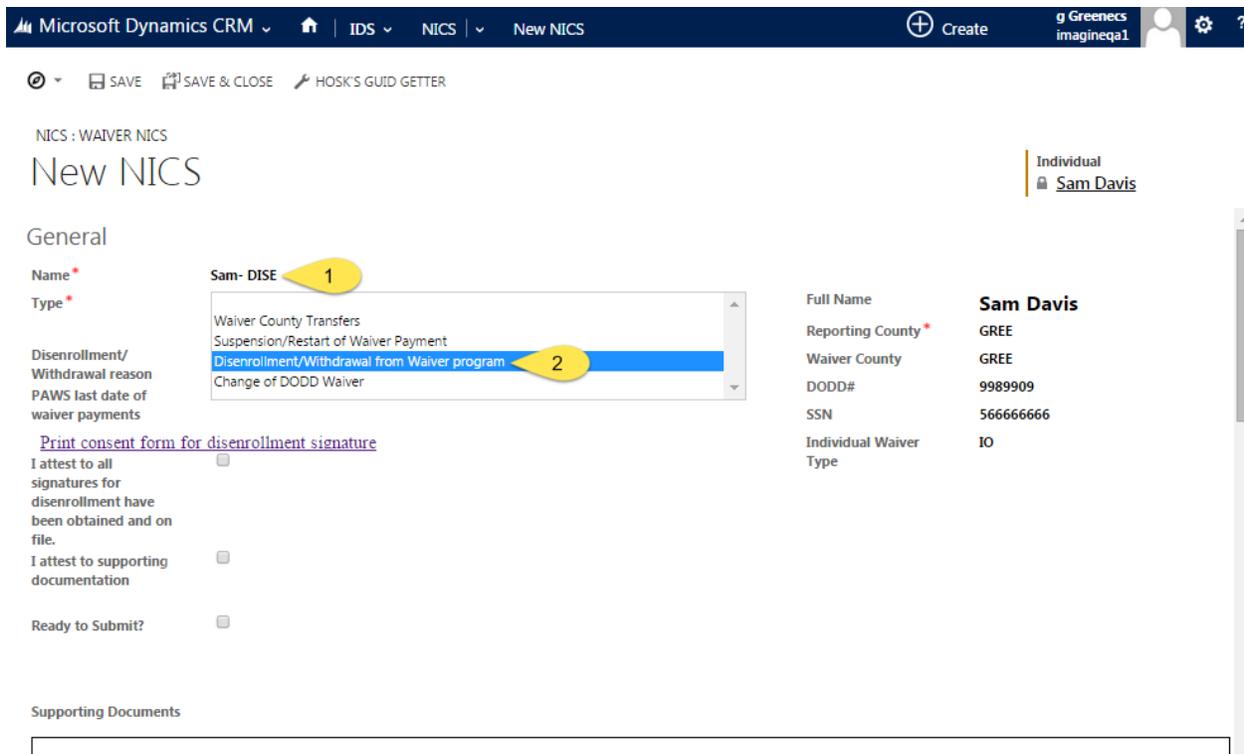
Disenrollment/Withdrawal Waiver Program NICS

1. Add New NICS



2. Add a Name for your NICS

3. Select Type of NICS = Disenrollment/Withdrawal from Waiver Program



4. Enter all Required Information

5. Save at any time



Microsoft Dynamics CRM | Home | IDS | NICS | Sam- DISE | Create | g Greenecs imagineqa1

NICS : WAIVER NICS

Individual
Sam Davis

General

Name* Sam- DISE
Type* Disenrollment/Withdrawal from Waiver program

Disenrollment/Withdrawal reason Incarceration **3**
PAWS last date of waiver payments 6/17/2015 **4**

[Print consent form for disenrollment signature](#)
I attest to all signatures for disenrollment have been obtained and on file. **5**
I attest to supporting documentation **6**

Ready to Submit?

Full Name **Sam Davis**
Reporting County* GREE
Waiver County GREE
DODD# 9989909
SSN 566666666
Individual Waiver Type IO

6. Click on the “Print consent form for disenrollment signature” to open the consent form

Microsoft Dynamics CRM | Home | IDS | NICS | Sam- DISE | Create | g Greenecs imagineqa1

NICS : WAIVER NICS

Individual
Sam Davis

General

Name* Sam- DISE
Type* Disenrollment/Withdrawal from Waiver program

Disenrollment/Withdrawal reason Incarceration
PAWS last date of waiver payments 6/17/2015

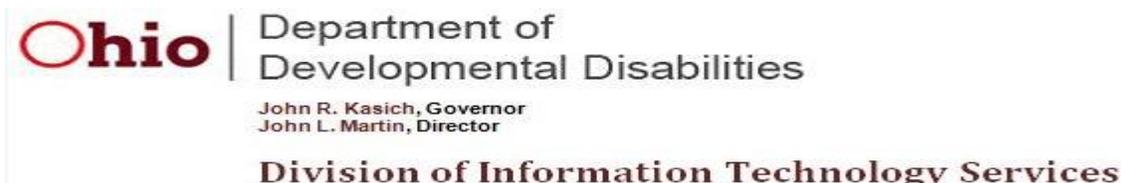
[Print consent form for disenrollment signature](#)

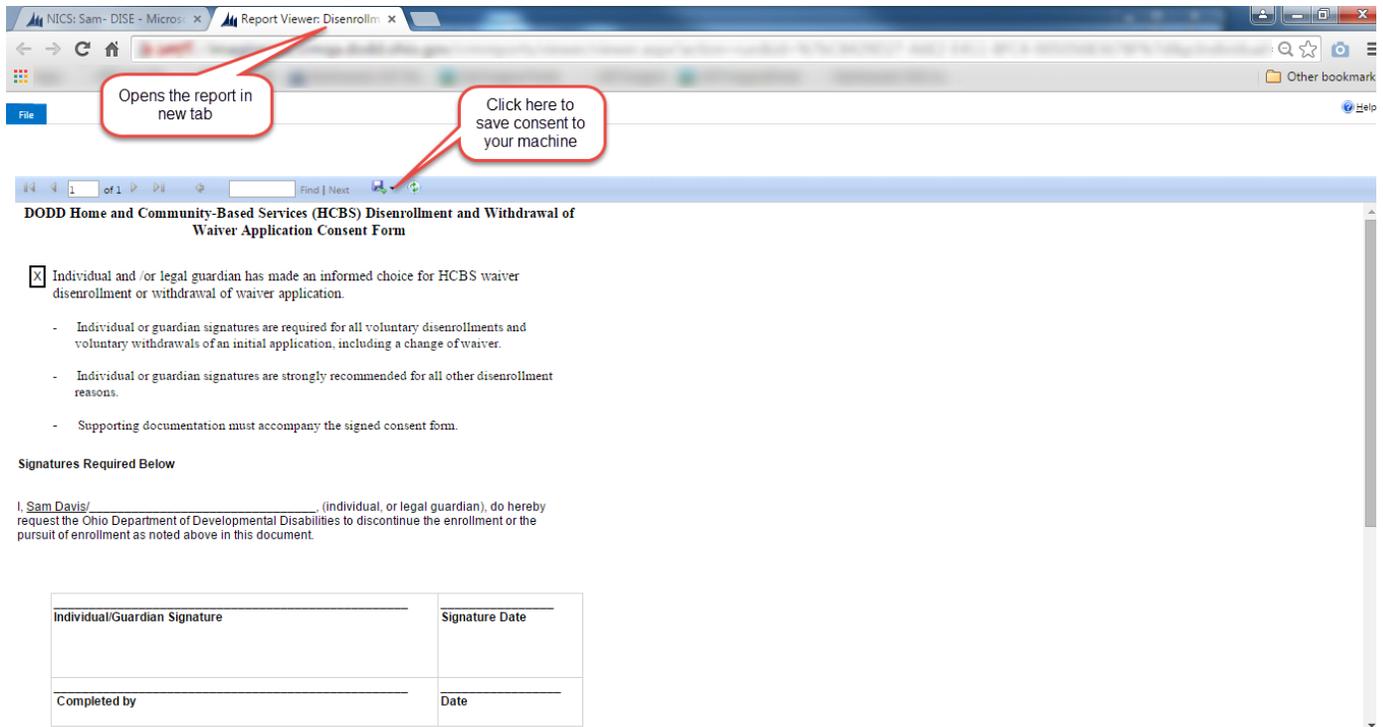
I attest to all signatures for disenrollment have been obtained and on file.
I attest to supporting documentation

Ready to Submit?

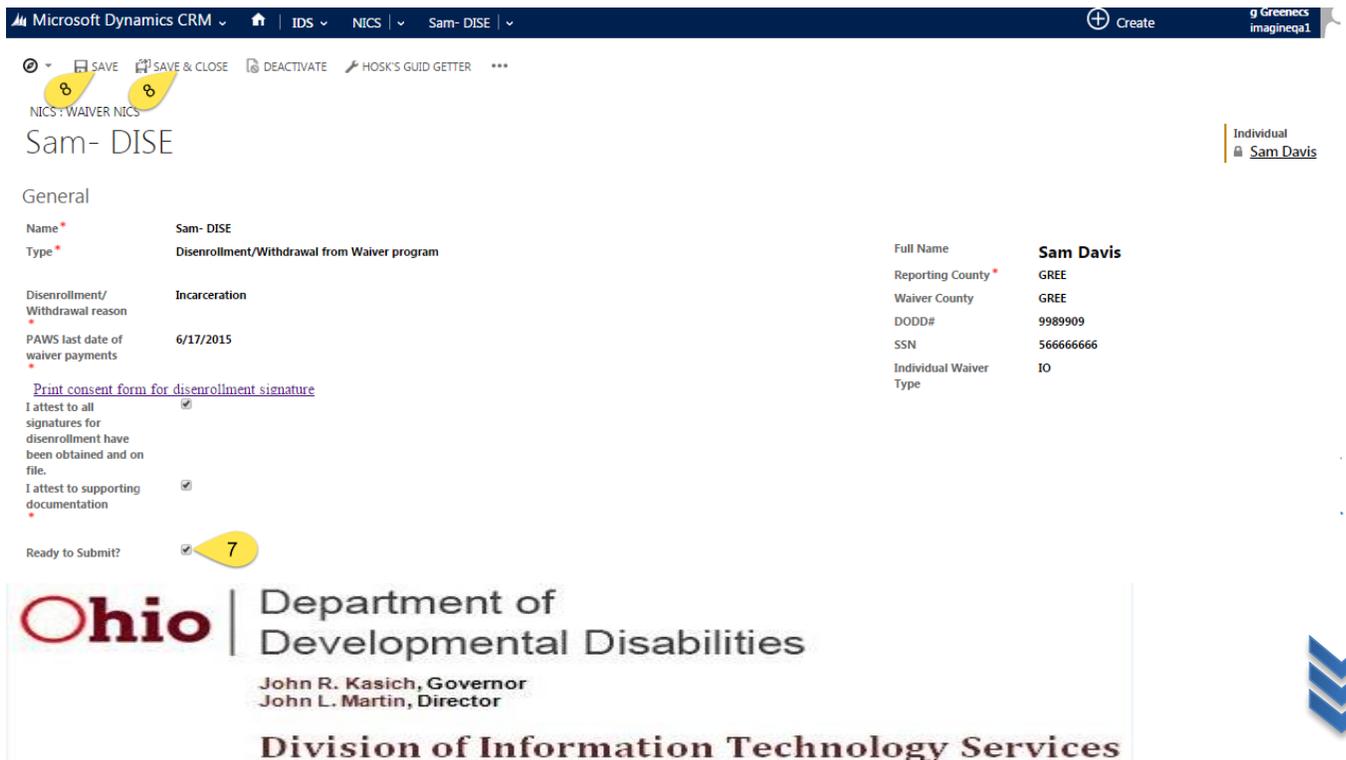
Full Name **Sam Davis**
Reporting County* GREE
Waiver County GREE
DODD# 9989909
SSN 566666666
Individual Waiver Type IO

7. Print and fill the form

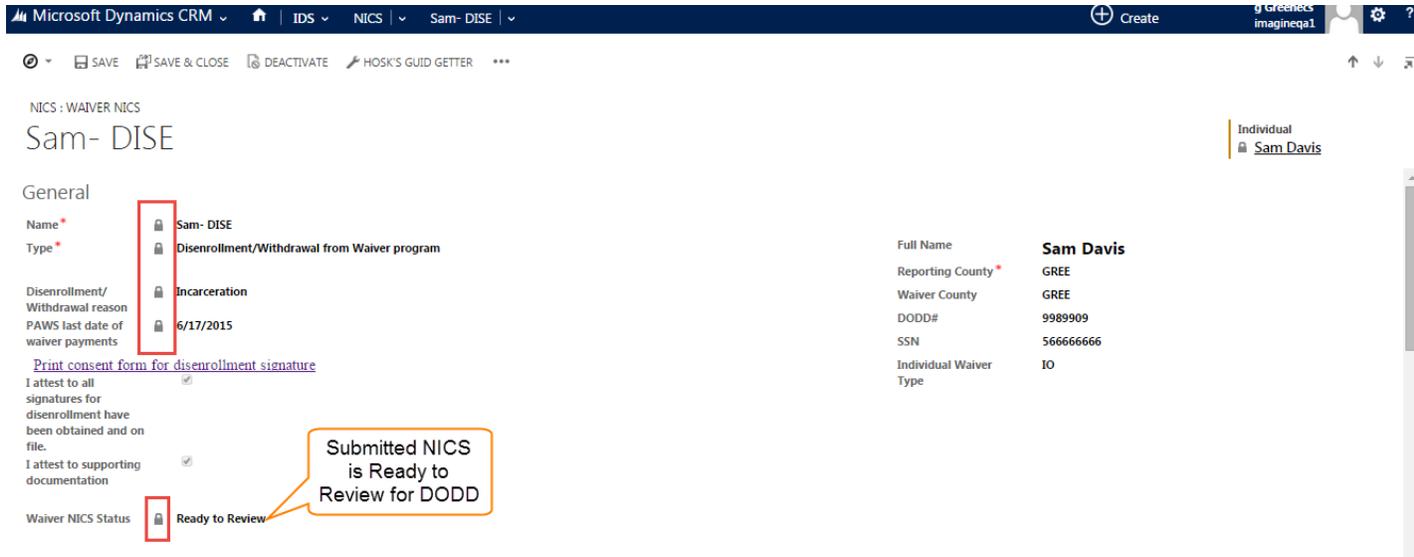




8. Upload a scanned copy of this consent form to Sharepoint from the Supporting Document tab on this NICS form.
9. Once ready to Submit → **Check mark the checkbox next to Submit** and click on Save
10. **NICS Submitted to DODD**



11. All fields on NICS will be read only; user will see the lock symbol next to all the fields and cannot edit anything now



You successfully submitted a Waiver NICS to DODD



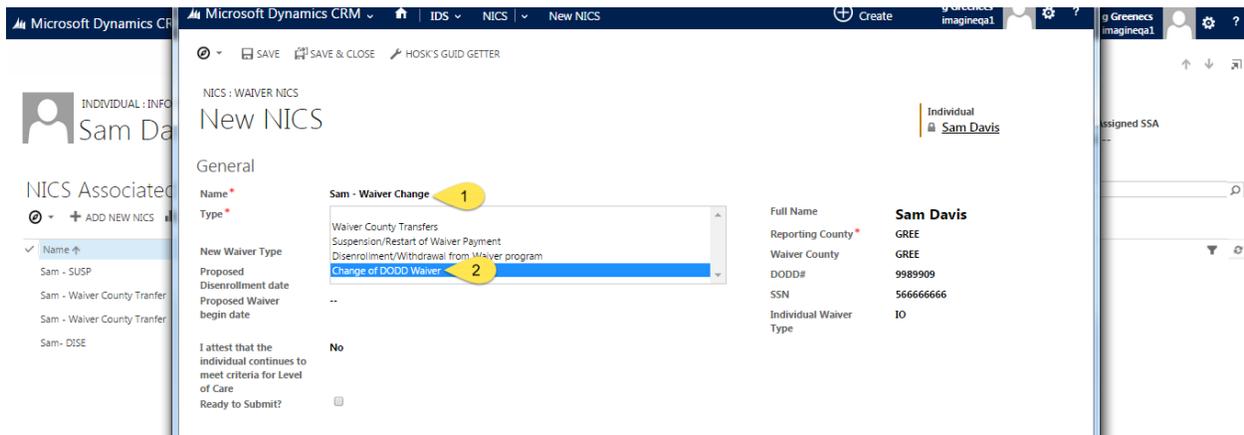
Change of DODD Waiver NICS

1. Add New NICS



2. Add a Name for your NICS

3. Select Type of NICS = Change of DODD Waiver NICS



4. Enter all Required Information

5. Save at any time



Select new waiver type

Microsoft Dynamics CRM | Home | IDS | NICS | New NICS | Create | g Greenecs imagineqa1

NICS : WAIVER NICS
New NICS | Individual | Sam Davis

General

Name * Sam - Waiver Change
Type * Change of DODD Waiver

New Waiver Type
Proposed Disenrollment date
Proposed Waiver begin date

I attest that the individual continues to meet criteria for Level of Care
Ready to Submit?

Full Name **Sam Davis**
Reporting County * GREE
Waiver County GREE
DODD# 9989909
SSN 566666666
Individual Waiver Type IO

Enter other information

Microsoft Dynamics CRM | Home | IDS | NICS | New NICS | Create | g Greenecs imagineqa1

NICS : WAIVER NICS
New NICS | Individual | Sam Davis

General

Name * Sam - Waiver Change
Type * Change of DODD Waiver

New Waiver Type L1
Proposed Disenrollment date 6/17/2015
Proposed Waiver begin date 6/18/2015

I attest that the individual continues to meet criteria for Level of Care Yes
Ready to Submit?

Full Name **Sam Davis**
Reporting County * GREE
Waiver County GREE
DODD# 9989909
SSN 566666666
Individual Waiver Type IO

6. Once ready to Submit → Check mark the checkbox next to **Submit** and click on Save

7. NICS Submitted to DODD



Microsoft Dynamics CRM | IDS | NICS | Sam - Waiver Change | Create | g Greenecs imagineqa1

SAVE SAVE & CLOSE DEACTIVATE HOSK'S GUID GETTER

NICS : WAIVER NICS

Sam - Waiver Change

Individual
Sam Davis

General

Name*	Sam - Waiver Change	Full Name	Sam Davis
Type*	Change of DODD Waiver	Reporting County*	GREE
New Waiver Type*	L1	Waiver County	GREE
Proposed Disenrollment date*	6/17/2015	DODD#	9989909
Proposed Waiver begin date*	6/18/2015	SSN	566666666
I attest that the individual continues to meet criteria for Level of Care*	Yes	Individual Waiver Type	IO
Ready to Submit?	<input checked="" type="checkbox"/>		

8. All fields on NICS will be read only; user will see the lock symbol next to all the fields and cannot edit anything now

Microsoft Dynamics CRM | IDS | NICS | Sam - Waiver Change | Create | g Greenecs imagineqa1

SAVE SAVE & CLOSE DEACTIVATE HOSK'S GUID GETTER

NICS : WAIVER NICS

Sam - Waiver Change

Individual
Sam Davis

General

Name*	<input type="lock"/> Sam - Waiver Change	Full Name	Sam Davis
Type*	<input type="lock"/> Change of DODD Waiver	Reporting County*	GREE
New Waiver Type	<input type="lock"/> L1	Waiver County	GREE
Proposed Disenrollment date	<input type="lock"/> 6/17/2015	DODD#	9989909
Proposed Waiver begin date	<input type="lock"/> 6/18/2015	SSN	566666666
I attest that the individual continues to meet criteria for Level of Care	<input type="lock"/> Yes	Individual Waiver Type	IO
Waiver NICS Status	<input checked="" type="checkbox"/> Ready to Review		

Submitted NICS is Ready to Review for DODD

You successfully submitted a Waiver NICS to DODD

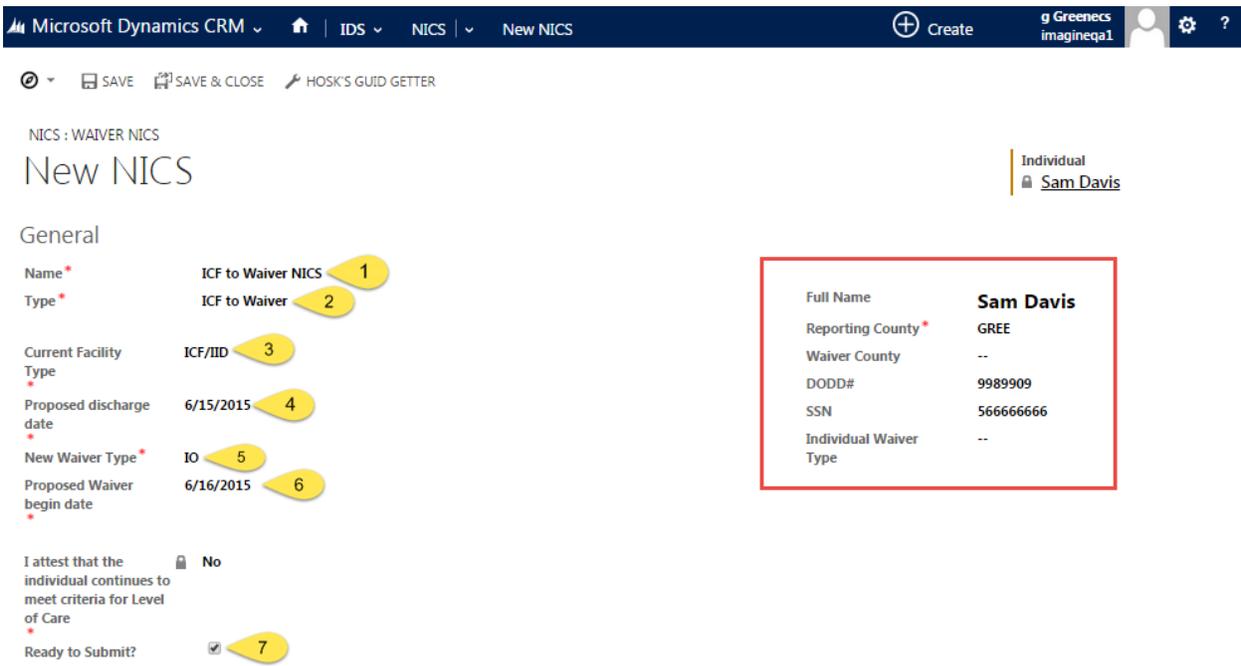


ICF to Waiver NICS

1. Add New NICS



2. Add a Name for your NICS
3. Select Type of NICS = ICF to Waiver
4. Enter all Required Information
5. Save at any time



July 1, 2015



6. Once ready to Submit → **Check mark the checkbox next to Submit** and click on Save

7. NICS Submitted to DODD

8. All fields on **NICS will be read only**; user will see the lock symbol next to all the fields and cannot edit anything now
You successfully submitted a Waiver NICS to DODD.

Submitted NICS View

Microsoft Dynamics CRM | Home | IDS | Individuals | Sam Davis | Create | Greenec imagineqa1

INDIVIDUAL : INFORMATION
 Sam Davis | Date of Birth: 6/6/2000 | SSN: XXX-XX-6666 | Assigned SSA: --

NICS Associated View

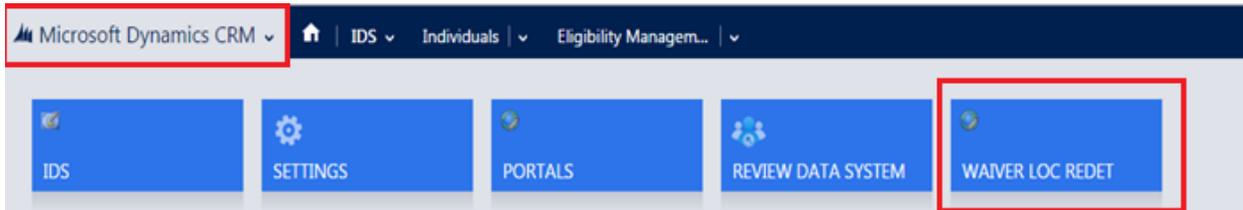
Search for records

Name	Created On
Sam - SUSP	6/17/2015 2:59 PM
Sam - Waiver Change	6/17/2015 8:20 PM
Sam - Waiver County Transfer	6/17/2015 2:29 PM
Sam - Waiver County Transfer	6/17/2015 2:32 PM
Sam - DISE	6/17/2015 3:21 PM

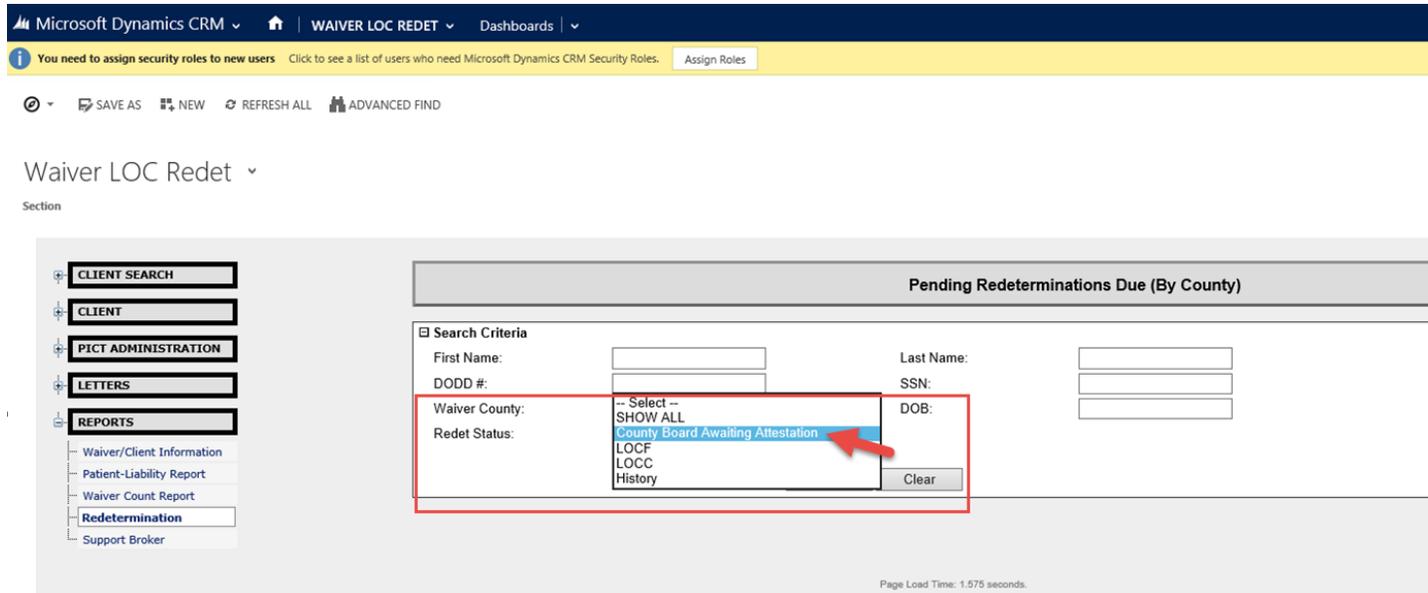
List of submitted NICS for this individual

Waiver Redeterminations for LOC

1. Select the Waiver LOC Redet Tile from the dropdown arrow next to Microsoft Dynamics CRM.



2. You will see WMS iframe in CRM → Pull up all the redets due for your county



3. List of individuals whose redets are due will show up



Waiver LOC Redet ▼
Section

4. Check mark the box next to the Individual’s name (same as current WMS Process) to select the redet you want to submit.

Note: You are submitting redets in WMS by accessing WMS from CRM. The functionality is same as current. You have to be an evaluator to submit redets from new LOC system.

Note: If individual does not have a valid LOC in CRM, the LOC status will be “None” and user will not be able to select that individual to submit a redet. LOC status should be “LOC Enrolled” to submit a redet.



Department of
Developmental Disabilities

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Division of Information Technology Services



Waiver LOC Redet

Section

Pending Redeterminations Due (By County)

Search Criteria
First Name: Last Name:
DODD #: SSN:
Waiver County: FAIRFIELD DOB:
Redet Status: County Board Awaiting Attestation

Search Clear

Name	Waiver Type	Classification	DODD#	CRISE#	Current Waiver Ends	County Board Attest	QMRP Approval	OA3 Medicaid Verify	Track Status	LOC Status
<input checked="" type="checkbox"/>						6/17/2015			ENRL	LOC Enrolled
<input checked="" type="checkbox"/>						6/17/2015			ENRL	LOC Enrolled
<input checked="" type="checkbox"/>						6/17/2015			ENRL	LOC Enrolled
<input checked="" type="checkbox"/>						6/17/2015			ENRL	LOC Enrolled
<input type="checkbox"/>									ENRL	LOC Enrolled
<input type="checkbox"/>									ENRL	LOC Enrolled
<input type="checkbox"/>									ENRL	LOC Enrolled
<input type="checkbox"/>									ENRL	LOC Enrolled
<input type="checkbox"/>									ENRL	LOC Enrolled

Page 1 of 1
First Previous 1 Next Last

Search time: 2.292 seconds: 40 records found. SUBMIT

5. Click on Submit to submit redets

Waiver LOC Redet

Section

Pending Redeterminations Due (By County)

Search Criteria
First Name: Last Name:
DODD #: SSN:
Waiver County: FAIRFIELD DOB:
Redet Status: County Board Awaiting Attestation

Search Clear

Name	Waiver Type	Classification	DODD#	CRISE#	Current Waiver Ends	County Board Attest	QMRP Approval	OA3 Medicaid Verify	Track Status	LOC Status
<input checked="" type="checkbox"/>						6/17/2015			ENRL	LOC Enrolled
<input checked="" type="checkbox"/>						6/17/2015			ENRL	LOC Enrolled
<input checked="" type="checkbox"/>						6/17/2015			ENRL	LOC Enrolled
<input checked="" type="checkbox"/>						6/17/2015			ENRL	LOC Enrolled
<input type="checkbox"/>									ENRL	LOC Enrolled
<input type="checkbox"/>									ENRL	LOC Enrolled
<input type="checkbox"/>									ENRL	LOC Enrolled
<input type="checkbox"/>									ENRL	LOC Enrolled
<input type="checkbox"/>									ENRL	LOC Enrolled

Page 1 of 1
First Previous 1 Next Last

Search time: 2.292 seconds: 40 records found. SUBMIT

July 1, 2015



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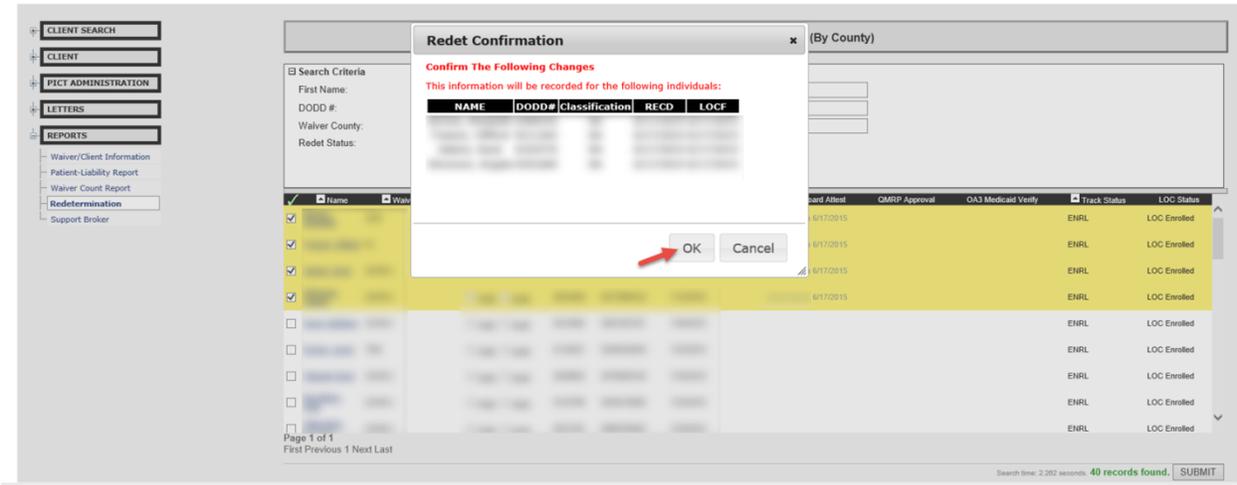
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6. Click OK

Waiver LOC Redet ▼
Section



You have successfully submitted redets to DODD. Once DODD approves the redets, LOC effective and LOC end dates will be updated on individuals' packets.



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