

User Guide for CRM – IDS & LOC

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

Bansal, Pooja
7/1/2015



Department of Developmental Disabilities

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.



Contents

County Boards Roles	4
1. Customer Service Guide - CSG (IDS Create)	4
Login	4
Dashboard	5
Access Individual	8
Search Individual	9
Start Individual Create Process	11
Create Introduction.....	13
Create Individual	15
Search Individual	18
Edit Individual’s Information.....	20
Add Address	22
Edit Individual Address.....	25
Edit Service and Support.....	28
Individual Transfer Process (ITR).....	29
Decision Tree for County Board Eligibility	36
LOC for County Board Eligibility (Applies to only 10 & above individuals)	56
LOC for Waiver Eligibility.....	59
2. Eligibility Specialist (IDS Edit)	67
Login	67
Dashboard	68
Access Individual	70
Search Individual	72
Edit Individual’s Information.....	73
Add Address	75
Edit Individual Address.....	79
Edit Service and Support.....	81
Decision Tree for County Board Eligibility	83
LOC for County Board Eligibility (Applies to only 10 & above individuals)	103



- LOC for Waiver Eligibility..... 106
- 3. Service Support Administrator – SSA (IDS Read) 113
 - Login..... 113
 - Dashboard..... 114
 - Access Individual 116
 - Search Individual..... 118
- 4. County Board Evaluator 120
 - Login..... 120
 - Dashboard..... 121
 - Access Individual 122
 - Search Individual..... 123
 - Decision Tree for County Board Eligibility 126
 - LOC for County Board Eligibility (Applies to only 10 & above individuals) 146
 - LOC for Waiver Eligibility..... 166
 - Waiver NICS (Notification of Individual’s Change in Status)..... 187
 - Waiver County Transfer NICS..... 187
 - Suspension/Restart of Waiver Program NICS..... 193
 - Disenrollment/Withdrawal Waiver Program NICS 196
 - Change of DODD Waiver NICS 200
 - ICF to Waiver NICS 203
 - Waiver Redeterminations for LOC..... 205

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

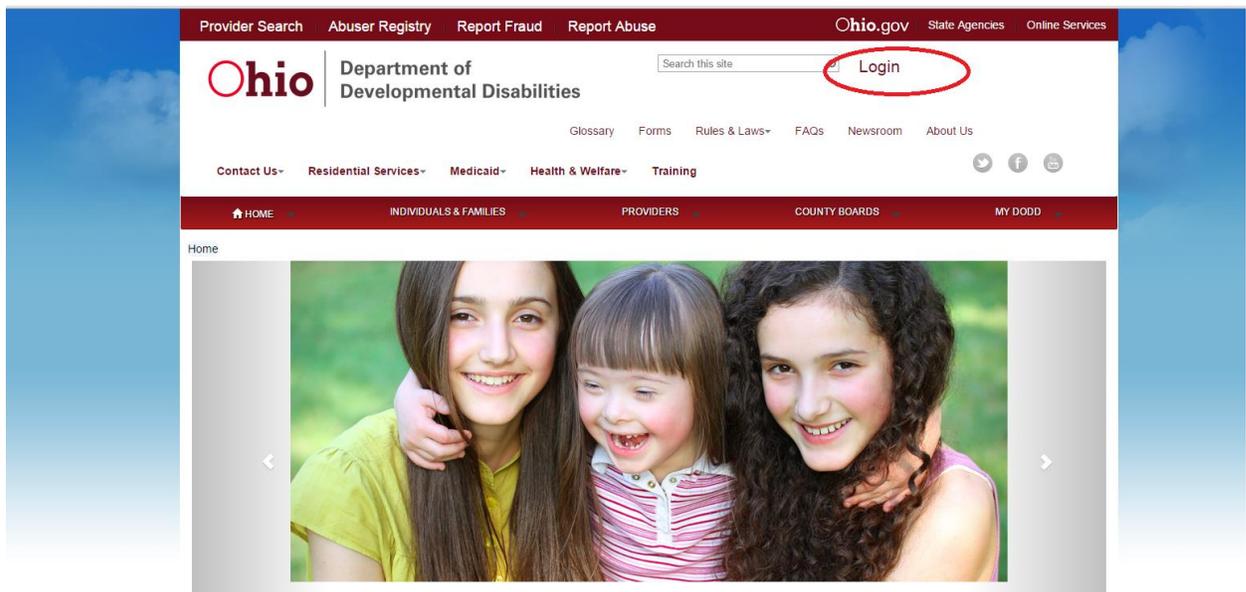


County Boards Roles

1. Customer Service Guide - CSG (IDS Create)

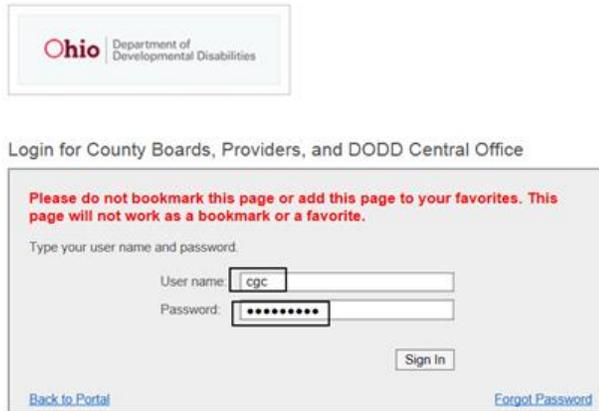
Login

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)





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:

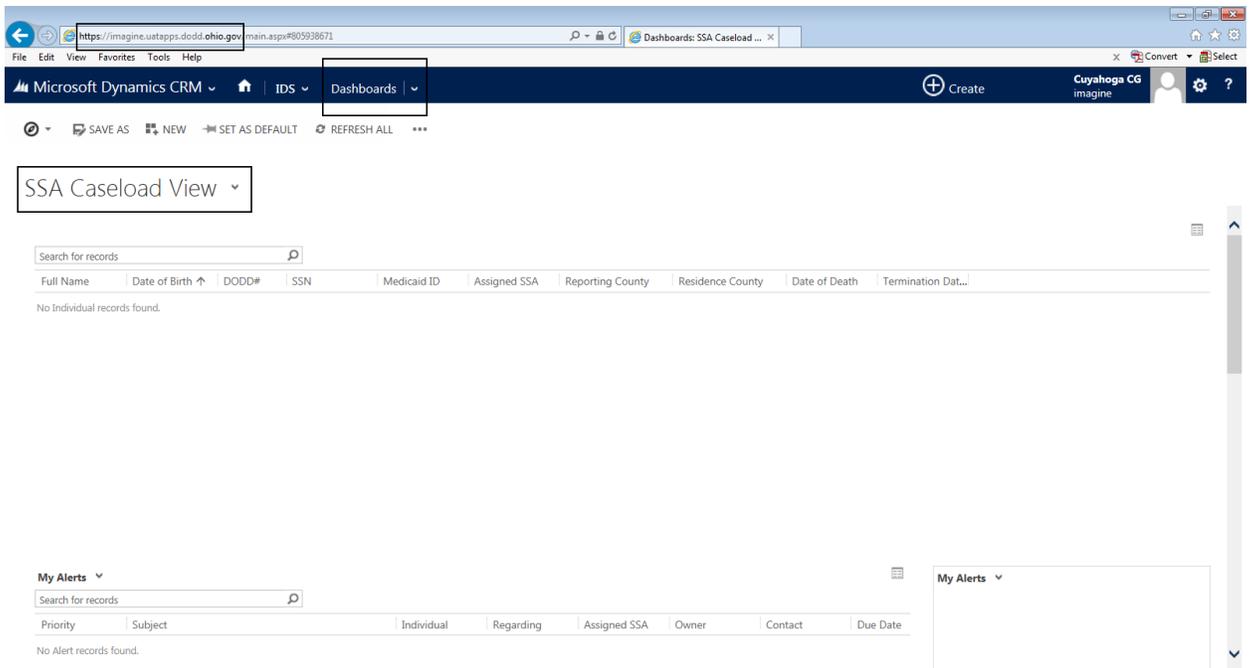
[Back to Portal](#) [Forgot Password](#)

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:

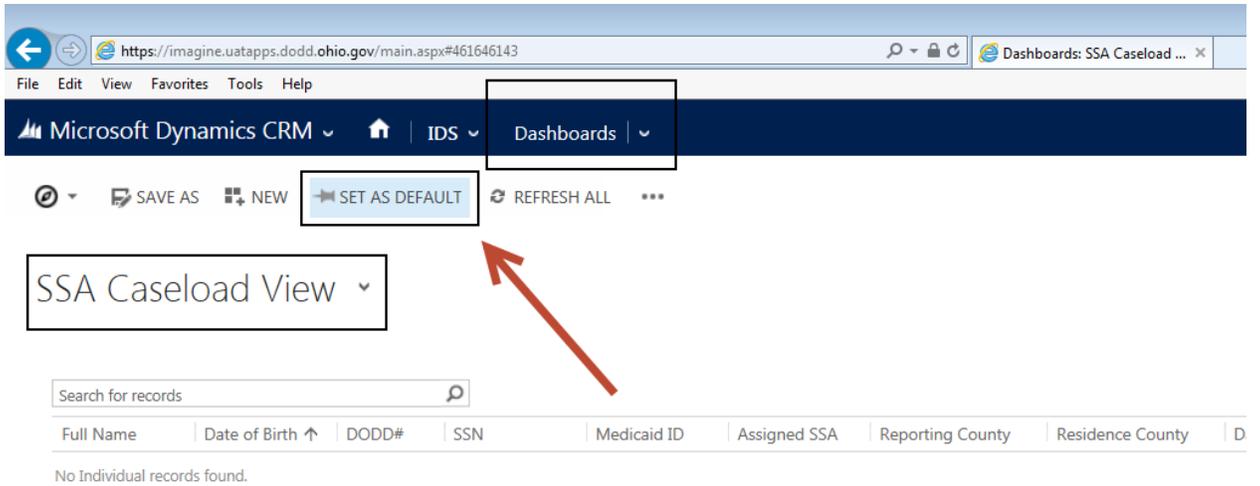
- a) Click on the dropdown arrow next to the currently selected view.
- b) Click on the view associated with the role you would like to open (ex. SSA Caseload view).
- c) Once selected from the view selector dropdown the SSA Caseload View will be visible.



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

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

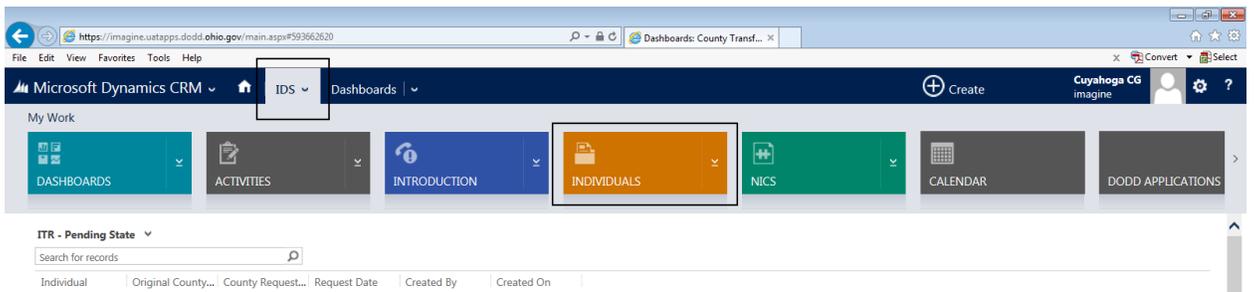




Access Individual

7. To access list of individuals in your county:

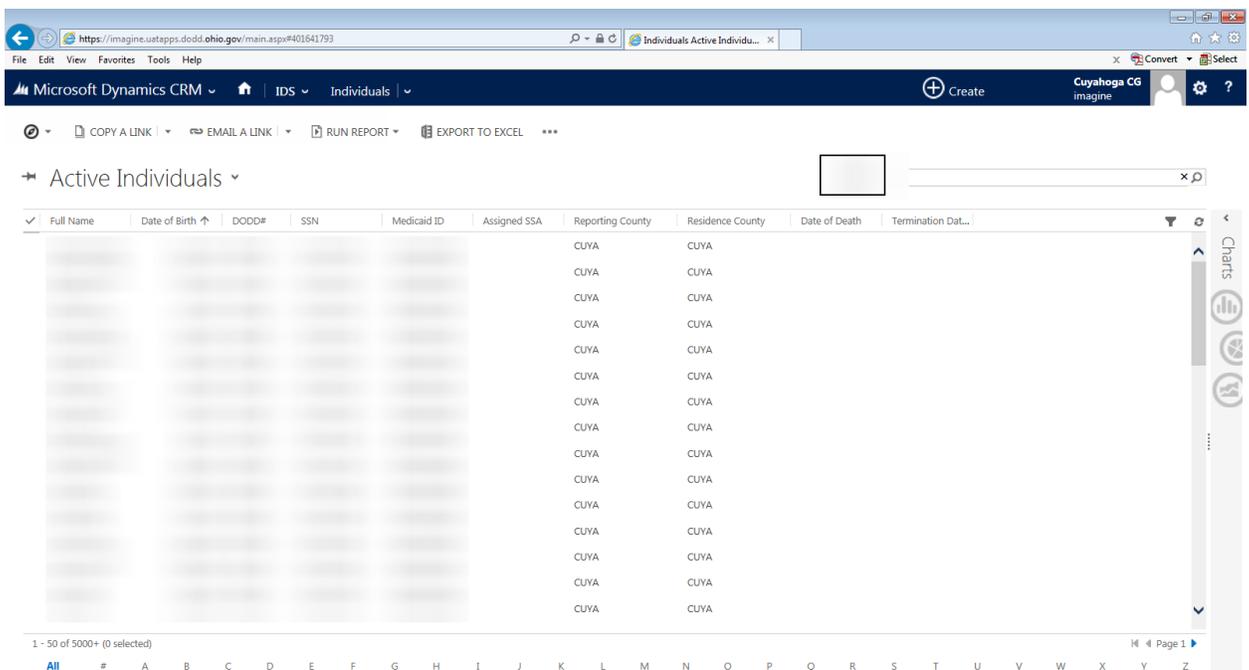
1. Scroll over the **IDS** icon to display all of the tiles (entities) under the IDS application. Click the **INDIVIDUALS** tile.

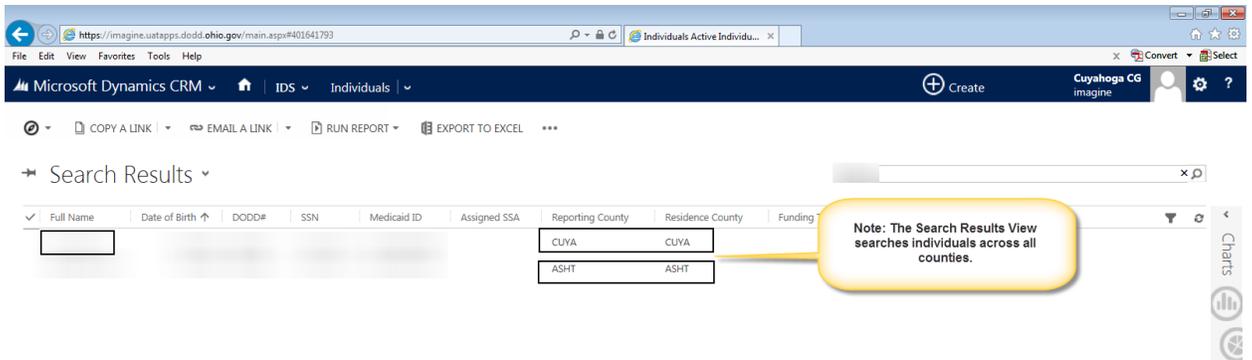


Name, Last Name, Full Name (Ex. Jonathan Dawkins),
Date of Birth, Medicaid #, SSN and DODD#.

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.

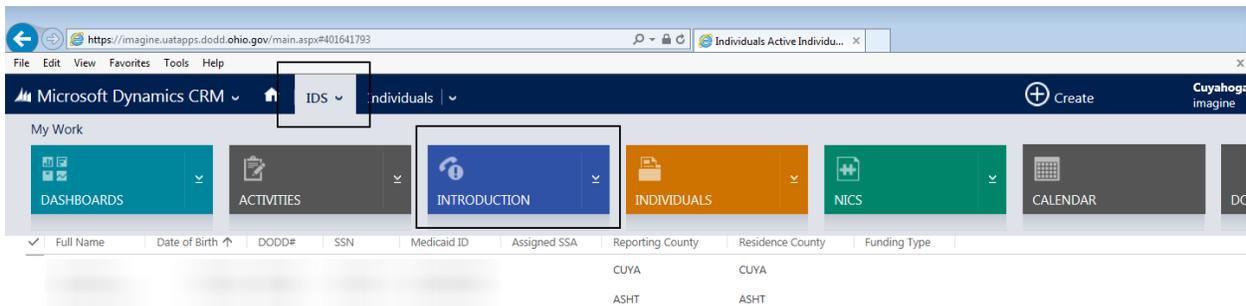




Start Individual Create Process

9. Follow these steps to Create New Individual

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



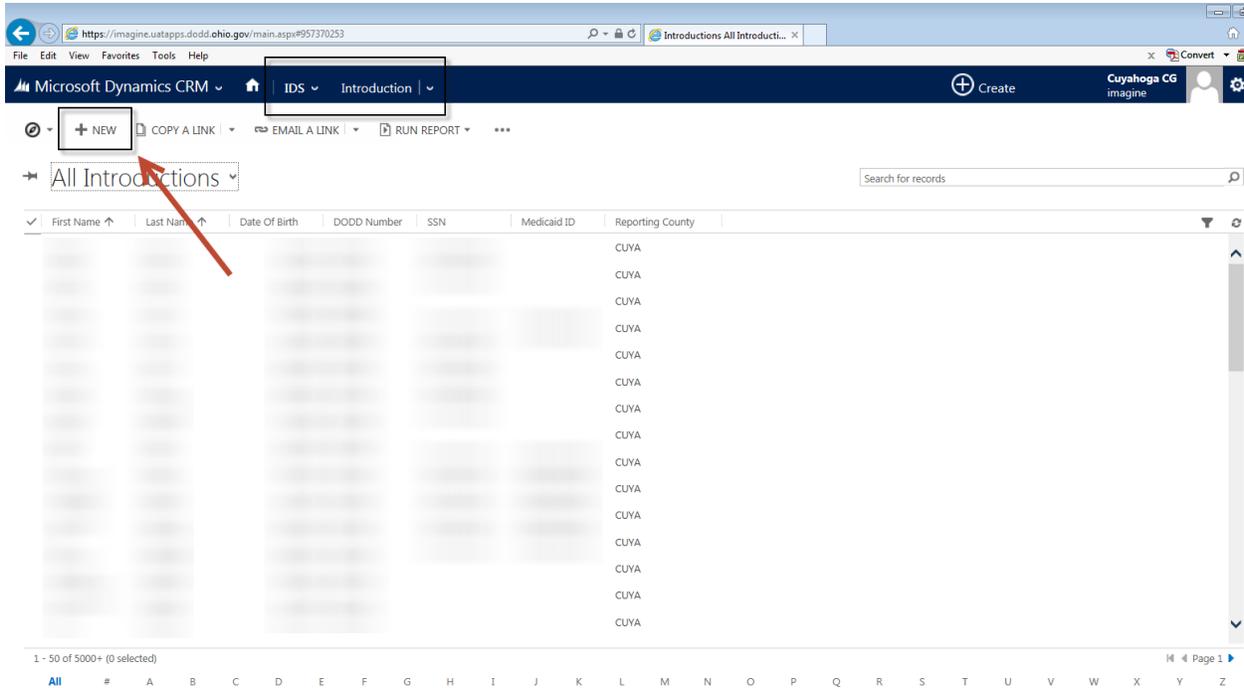
- b) The **All Introductions** View displays introductions from the county of the Customer Guide only.



Create Introduction

10. Follow these steps to Create Introduction

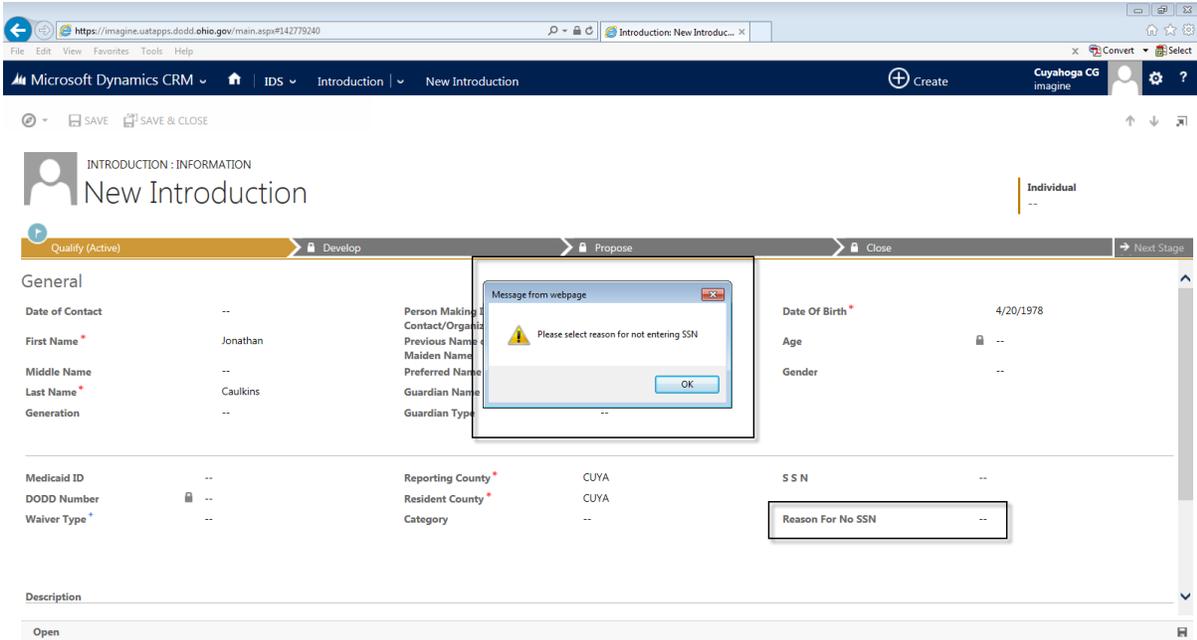
- a) Click on the **+ NEW** button on the left top corner of the Introduction page to create a new introduction



- 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.

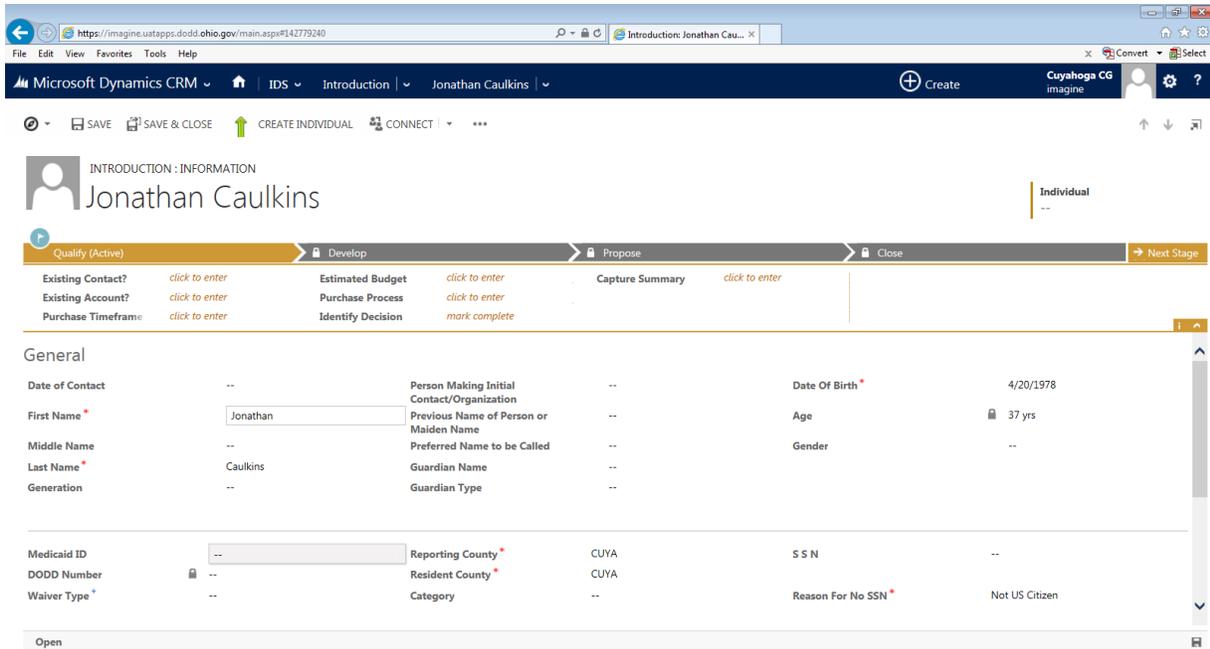
Note: *Required* fields are denoted with a red (*).





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



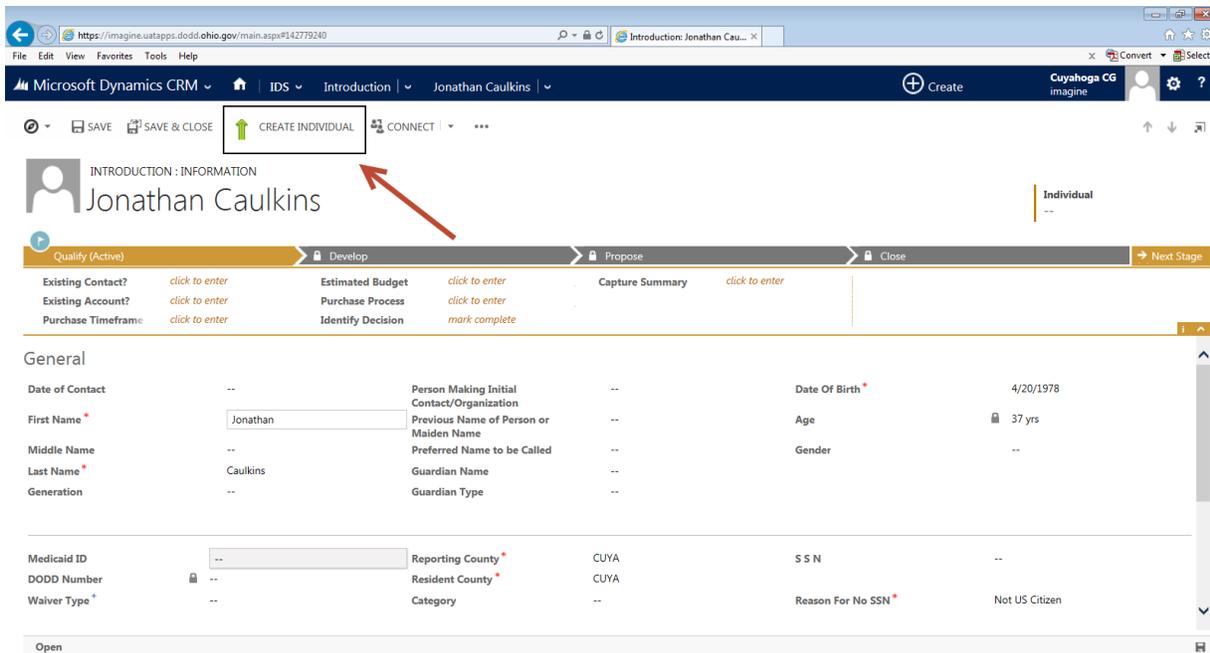


Create Individual

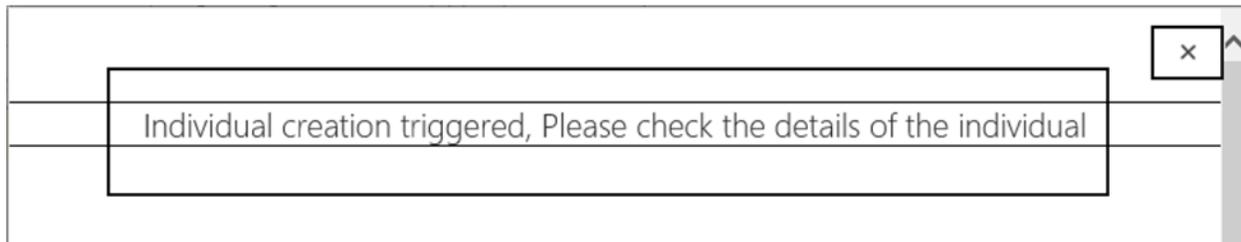
11. Follow these steps to Create Individual in IDS

- 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.

The screenshot shows a table with the following data:

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

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.

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 10 entries

Search:

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

Previous Next

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

Individual Creation triggered

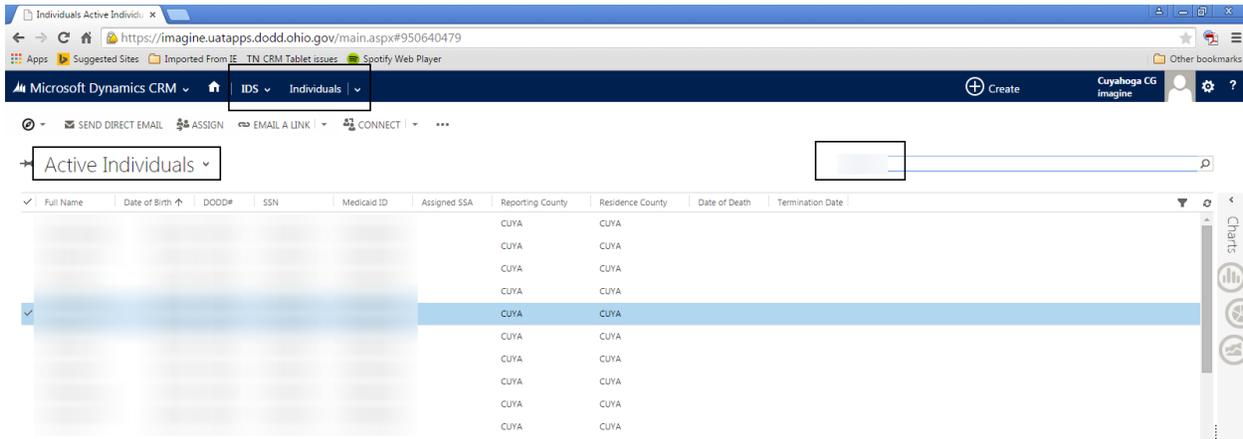
Search Individual

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

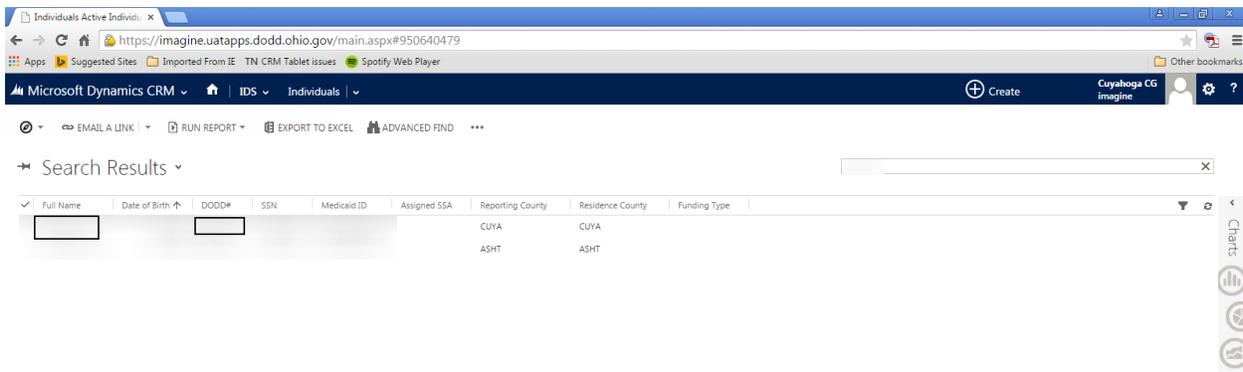


Name, Last Name, Full Name (Ex. Jonathan Dawkins),
Date of Birth, Medicaid #, SSN and DODD#.



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 displays the 'Individual: INFORMATION' page in Microsoft Dynamics CRM. The page is divided into several sections:

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

Two red arrows in the image point to the 'Individual Information' header and the 'DODD#' field.

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:

The screenshot shows the 'Individual: Information' page in Microsoft Dynamics CRM. The browser address bar displays 'https://imagine.uatapps.dodd.ohio.gov/main.aspx#515812684'. The page title is 'INDIVIDUAL: INFORMATION'. The 'Current As Of' date is 6/1/2015. The 'Email' section includes fields for First Name, Middle Name, Last Name, and Generation. The 'Date Of Birth' section includes fields for Age and Full Name. The 'Phone Information' section contains fields for Home Phone, Work Phone, Other Phone Type, Home Ext., Work Ext., Other Phone, Mobile Phone, and Other Ext. The 'Addresses' section is visible. The 'Additional Demographics' section includes 'Individual IDs' with fields for DODD#, Medicaid ID, and Local ID Numbers. The 'Reporting County' is set to 'CUYA'. The 'Active' status is 'Active'.

After edit:

The screenshot shows the 'Individual: Information' page in Microsoft Dynamics CRM after editing. The browser address bar displays 'https://imagine.uatapps.dodd.ohio.gov/main.aspx#515812684'. The page title is 'INDIVIDUAL: INFORMATION'. The 'Current As Of' date is now 6/8/2015. The 'Email' section includes fields for First Name, Middle Name, Last Name, and Generation. The 'Date Of Birth' section includes fields for Age and Full Name. The 'Phone Information' section contains fields for Home Phone, Work Phone, Other Phone Type, Home Ext., Work Ext., Other Phone, Mobile Phone, and Other Ext. The 'Addresses' section is visible. The 'Additional Demographics' section includes 'Individual IDs' with fields for DODD#, Medicaid ID, and Local ID Numbers. The 'Reporting County' is set to 'CUYA'. The 'Active' status is '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.

INDIVIDUAL ADDRESS : INFORMATION
New Individual Address

Individual
Judith Altfather

General

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

Address *
You must provide a value for Address.

Address Dates

Address Effective Begin Date *
6/11/2015

Address Effective End Date
..

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

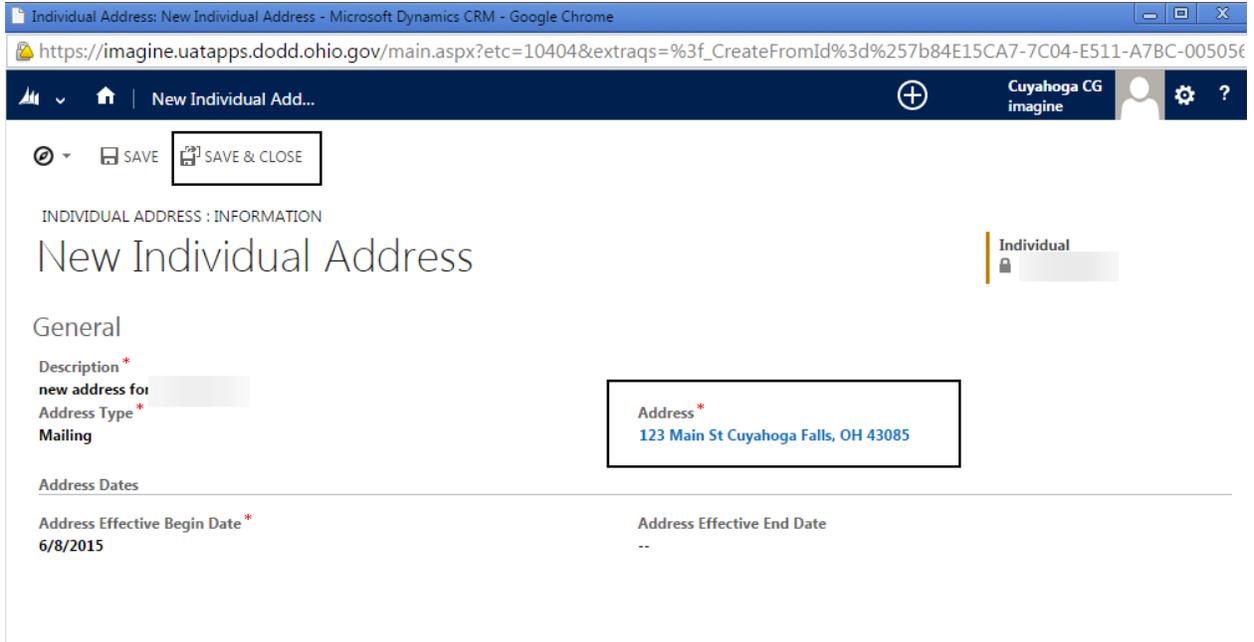
Zip* 43085

Facility

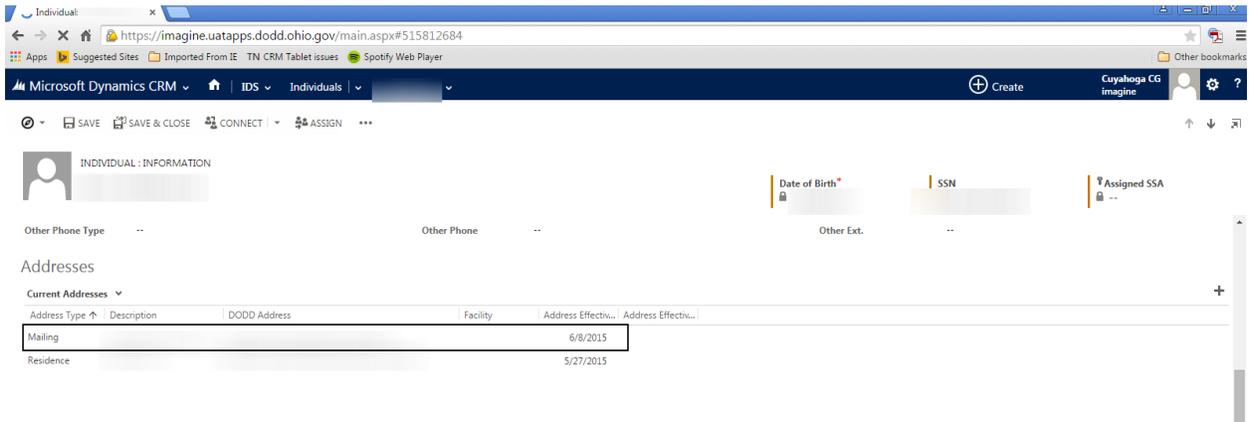
SAVE SAVE & CLOSE

- 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.

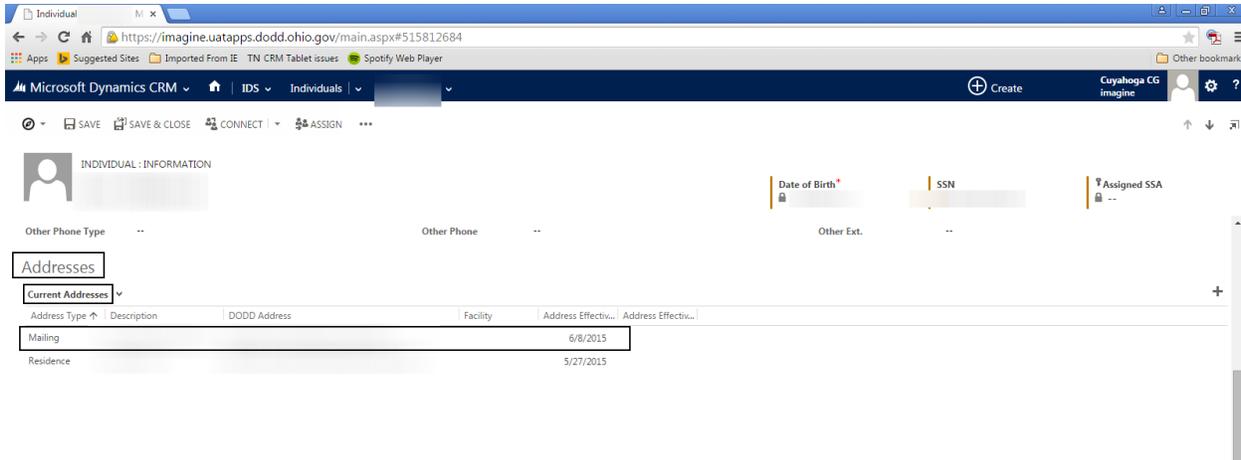


Edit Individual Address

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.

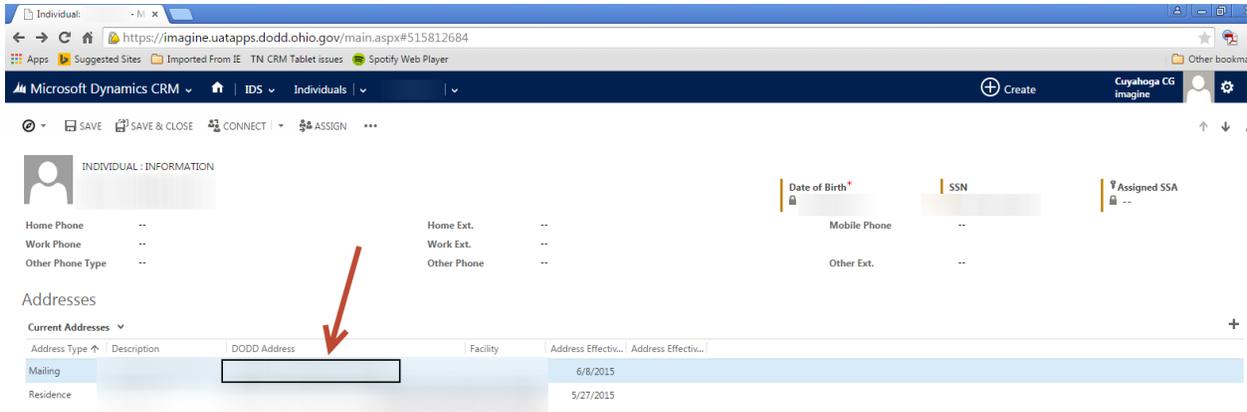


- ii. Click the field (Hyperlink) called **DODD Address** to open the Individual Address you would like to edit. This will take you directly to the *actual address* information.

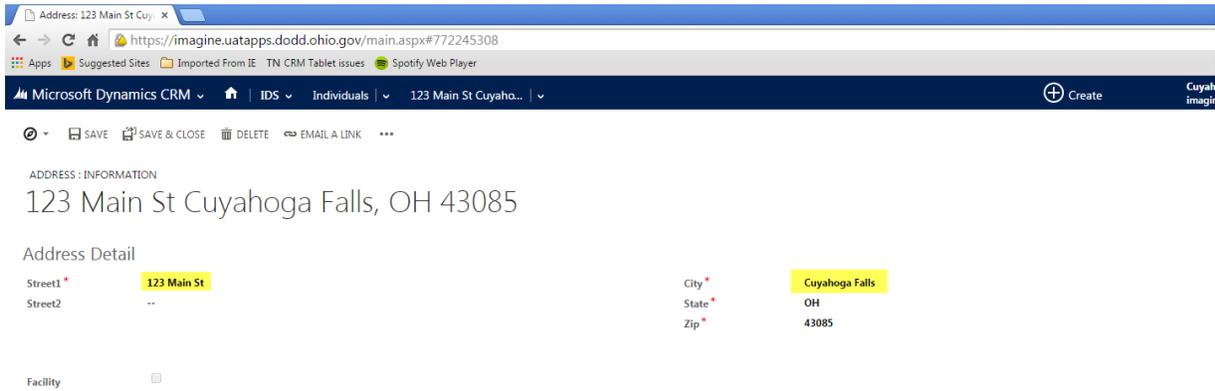
Note: Clicking the row instead of the DODD Address will allow you to edit the Description and Address Effective Begin Date but not the Address directly.

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

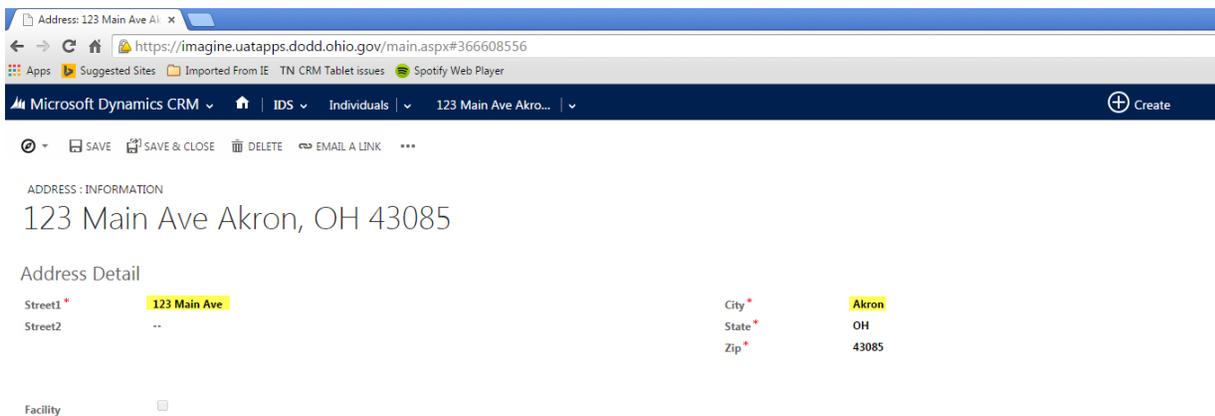




Before edit:



After edit:



Edit Service and Support

16. Edit (add or remove) Services and Support

- I. 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"/>

Age 82 +, but Pre-school selected



Individual: INFORMATION

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 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 checked="" 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 checked="" type="checkbox"/>	16. Family Supports	<input type="checkbox"/>

Others

Competitive Employment

Funding Quick Summary

DODD# [REDACTED] Medicaid ID [REDACTED] Reporting County CUYA

Active

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



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: --

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

County Information

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

Associated County Information

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

DODD# 9989853 | Medicaid ID | Reporting County KNOX

- 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

Microsoft Dynamics CRM | IDS | Individuals | Adam Lambert | Create | g Greenecs imagineq1

Common

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

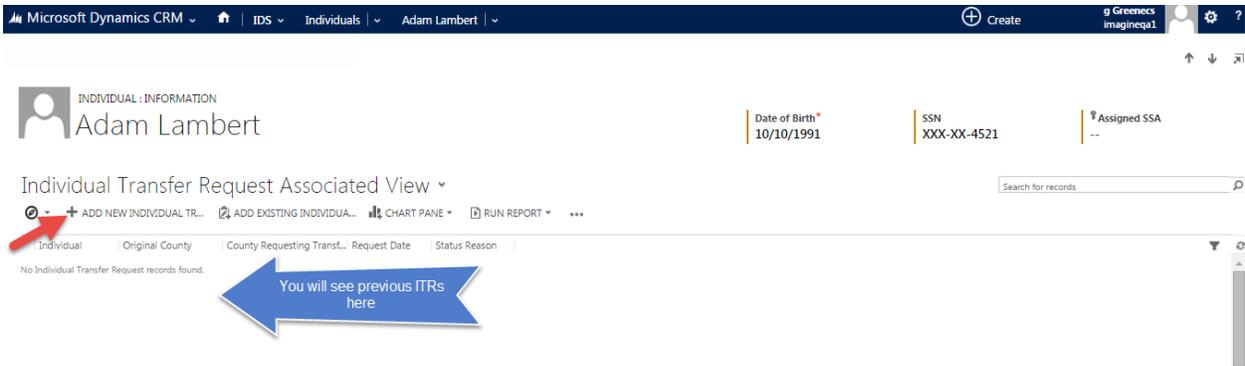
Primary Language: --
At Home: --
If Other, Please Specify: --

County Information

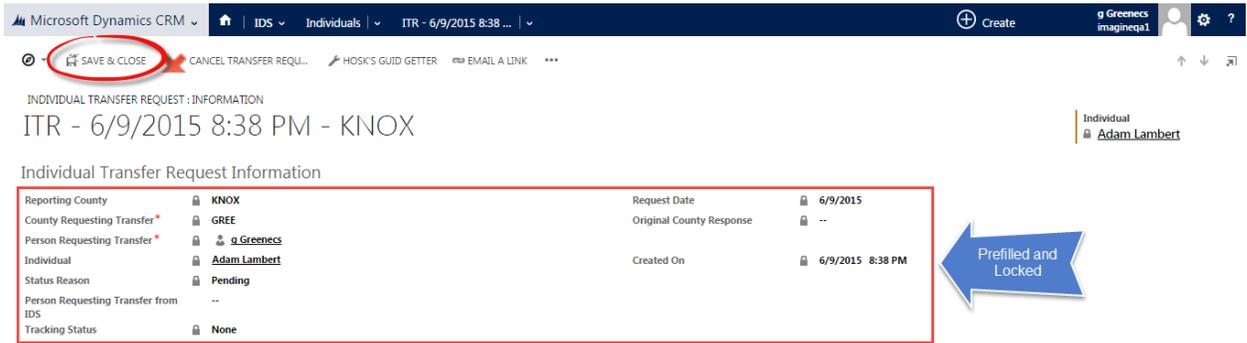
Enrollment Date: --	Termination Date: --	Reenrollment Date: --
Residence County: GREE	Reporting County: KNOX	Waiver County: --
Individual Waiver Type: --	Waiver Status: --	Waiver Start Date: --
Waiver Waiting List (WL): --	Private Pay Individual (DRA): --	Waiver End Date: --
Is DOD Source MUI: --	Date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

- 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**

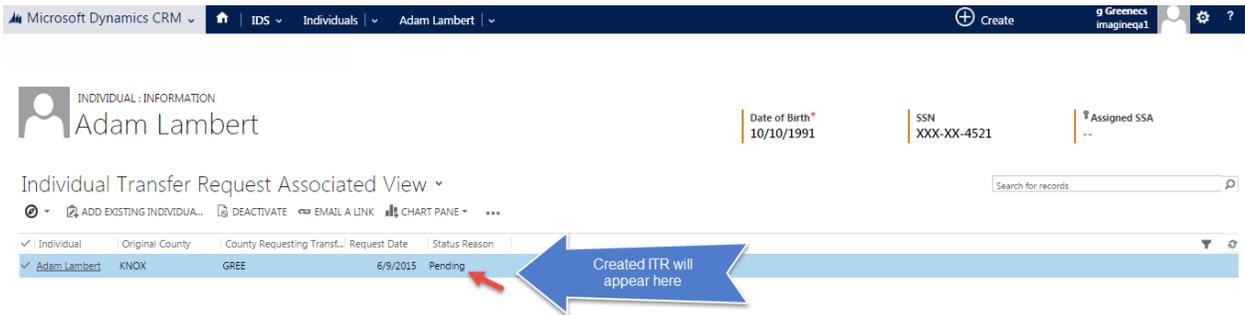




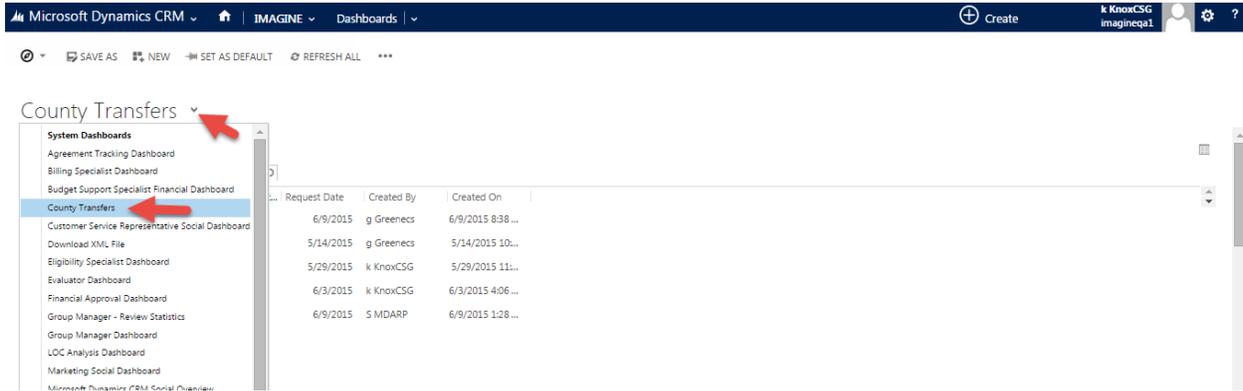
- V. ITR form will be created and will open in a new window. **Everything on the form will be prefilled and locked, you just have to click on the Save and Close button**



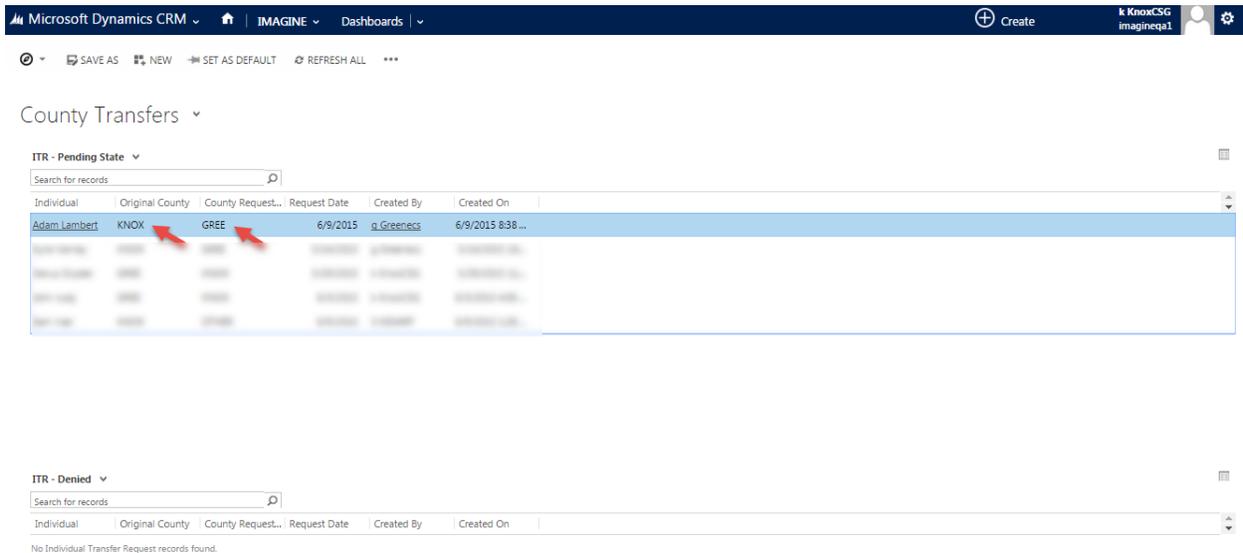
- VI. ITR will appear under the Individual Associated View and the Status reason will Pending once you do a Save and Close



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

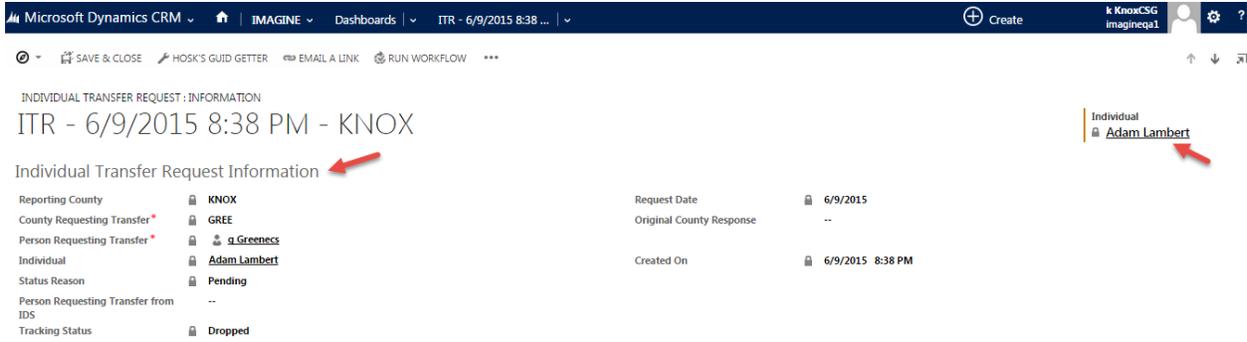


VIII. Can view the ITRs on this County Transfer Dashboard

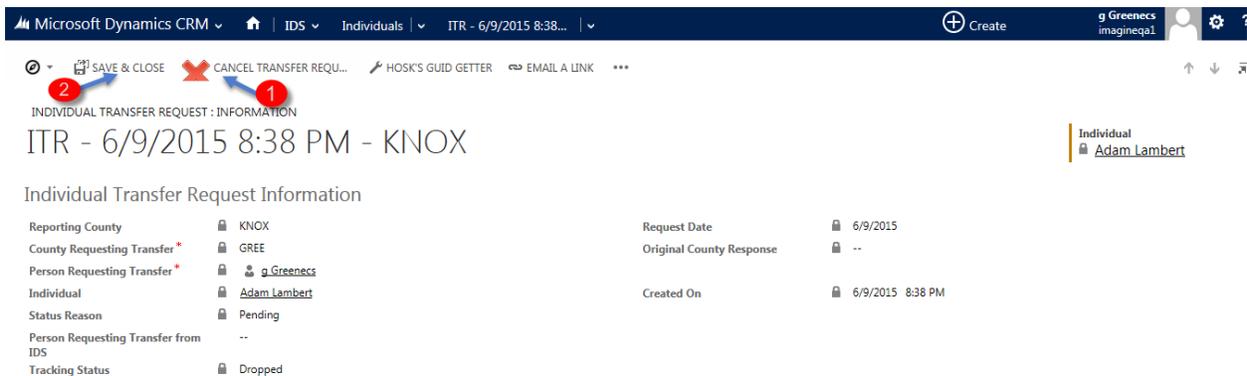


IX. Click on the record to open the ITR record



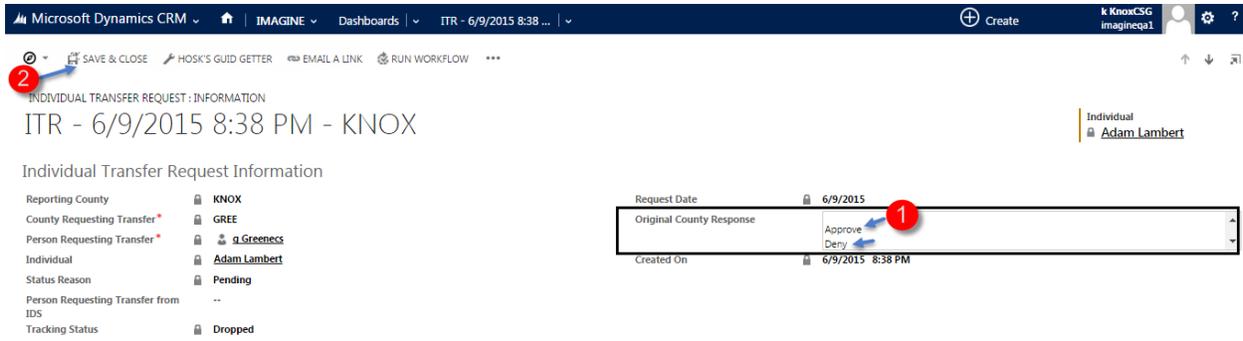


- X. The **original county** can either **Approve or Deny** the ITR or the **requesting county** can **Cancel** the submitted request
- Requesting county customer guide can click on **Cancel Transfer button (Red Cross)** at the top to cancel your transfer anytime

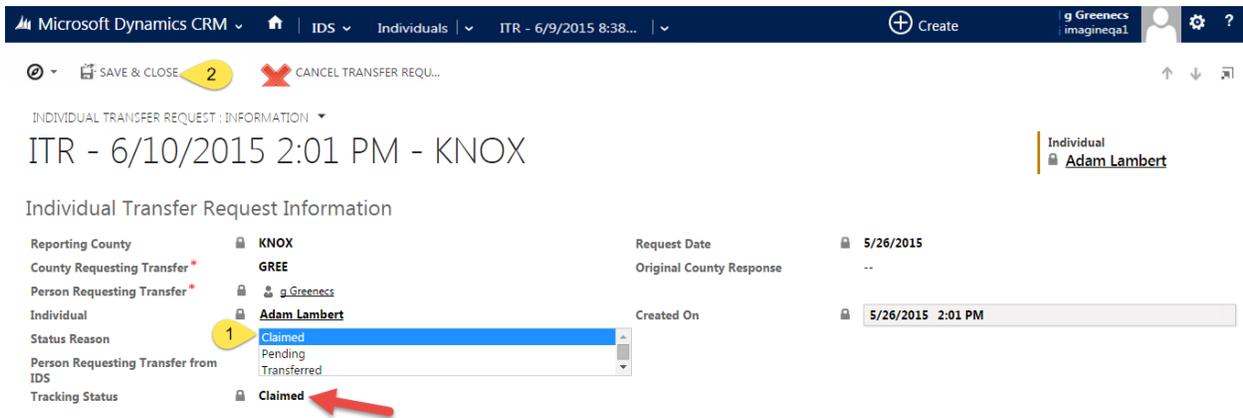


- Original county customer guide can click on the **Original County Response field** to either **Approve or Deny** to approve or deny the ITR respectively





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.



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

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

Individual
Adam Lambert

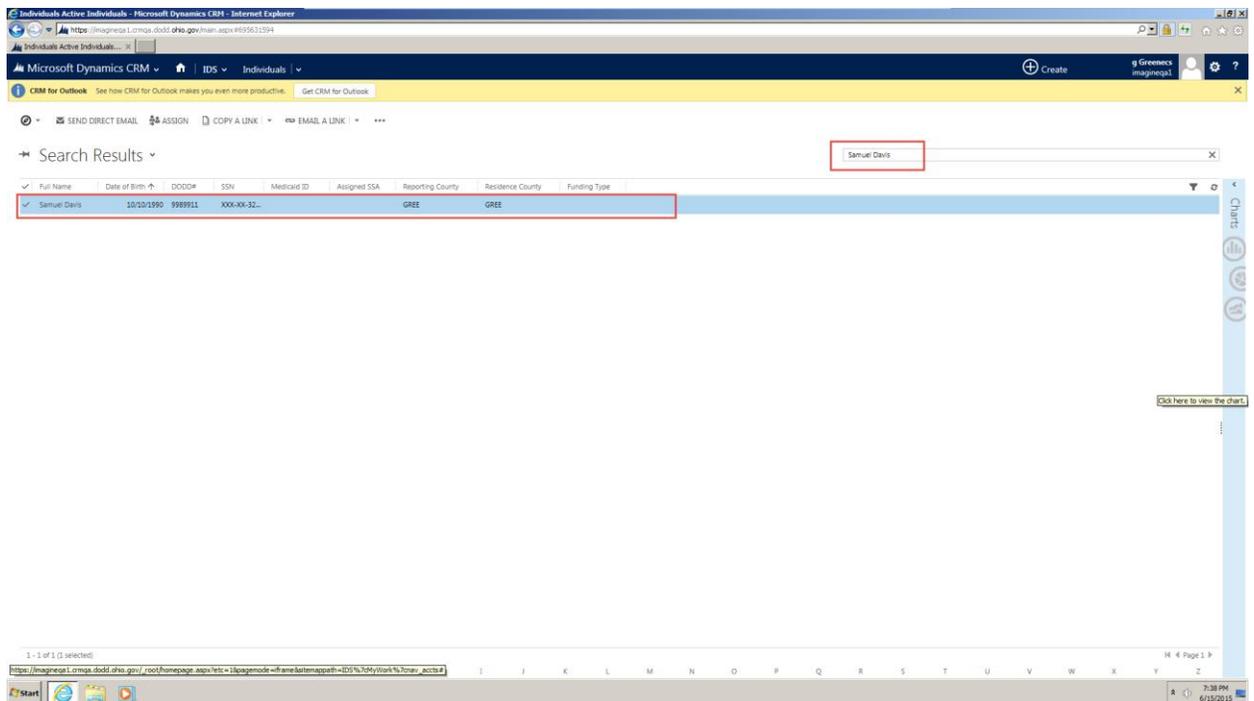
Individual Transfer Request Information

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		



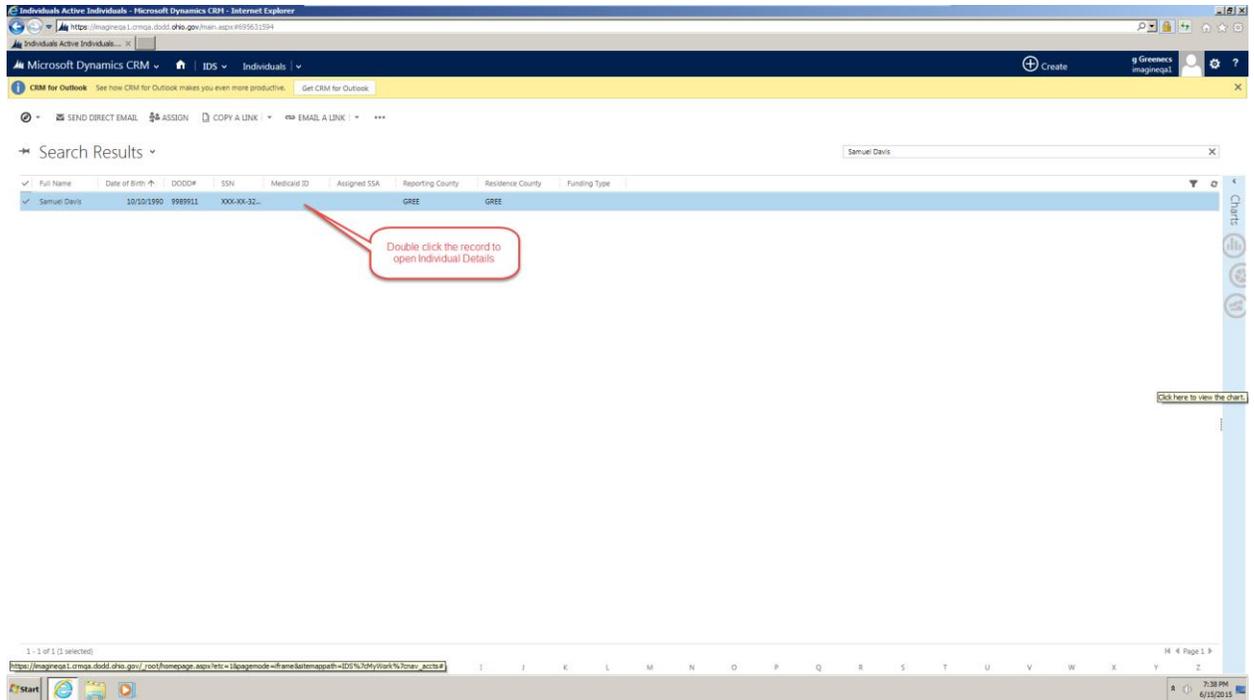
Decision Tree for County Board Eligibility

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

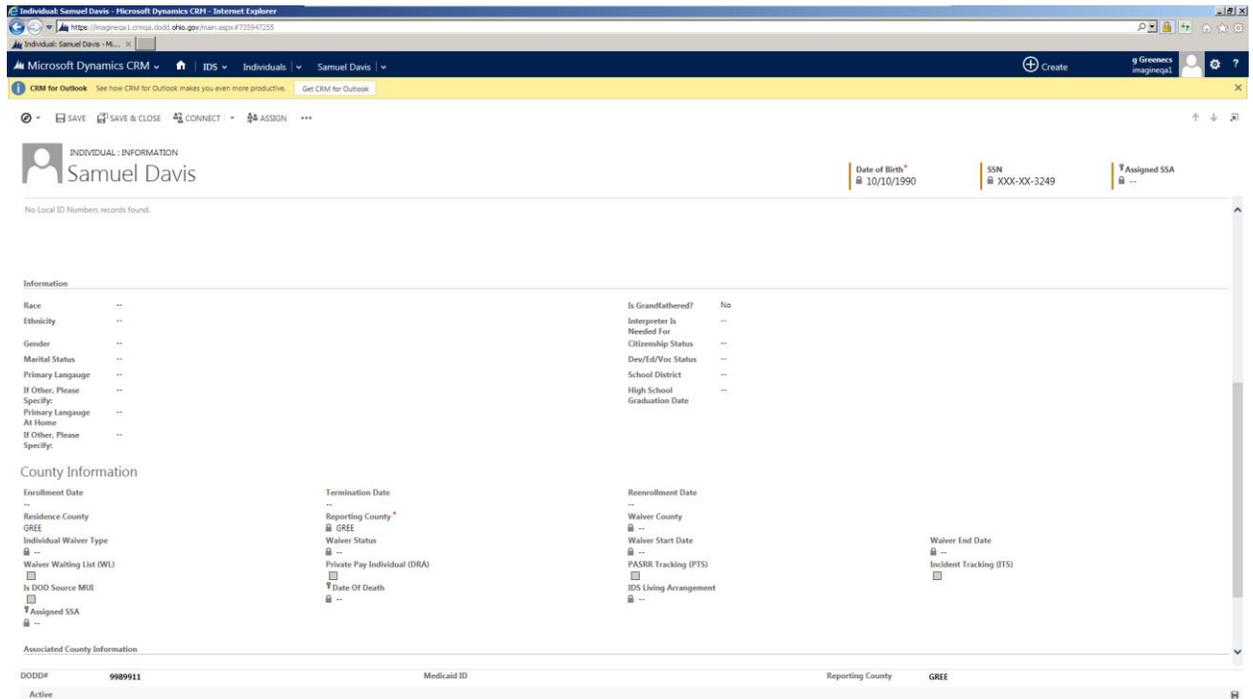


4. Double click on individual record to open individual's record

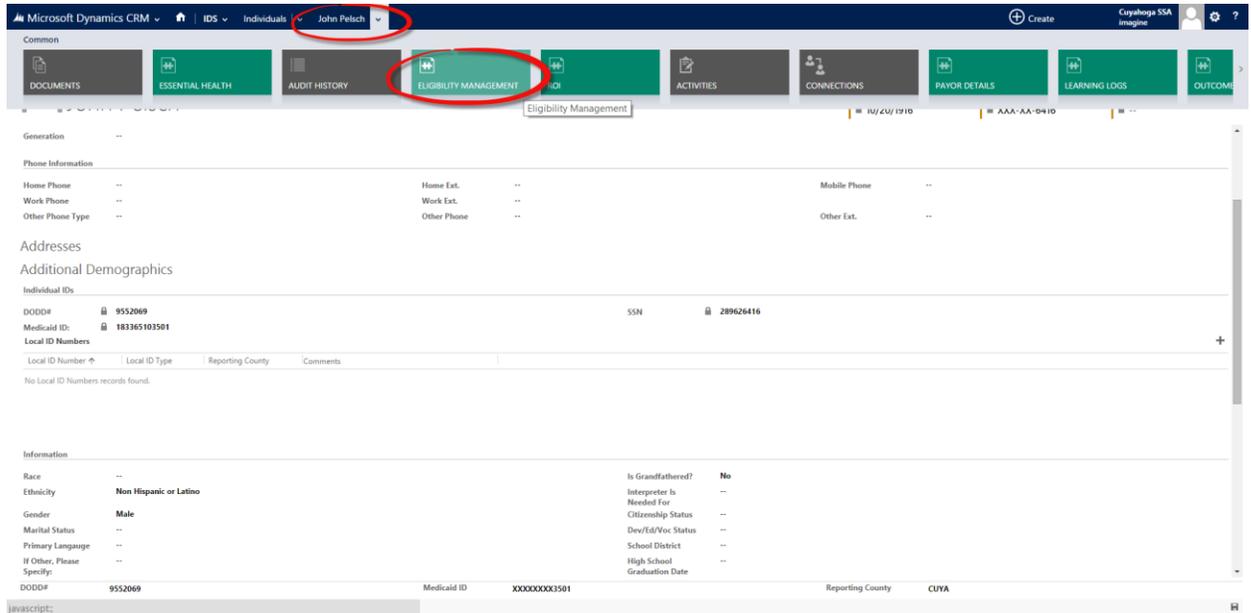




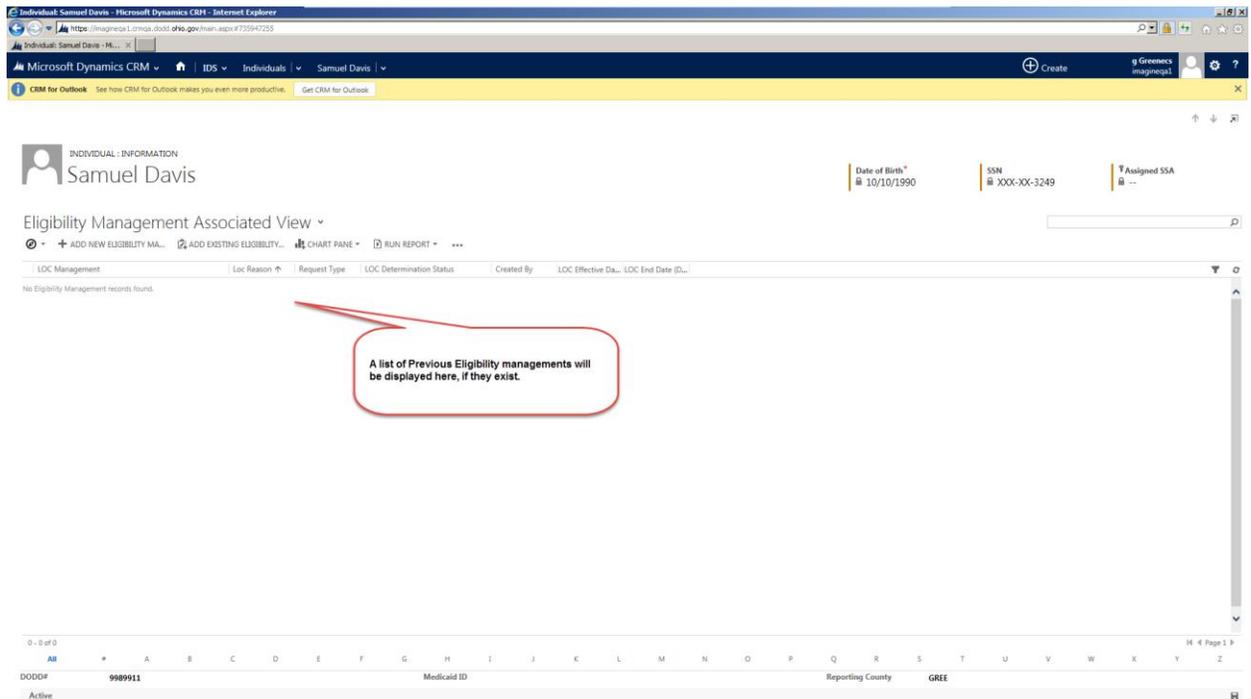
5. User will land on Individual front page.



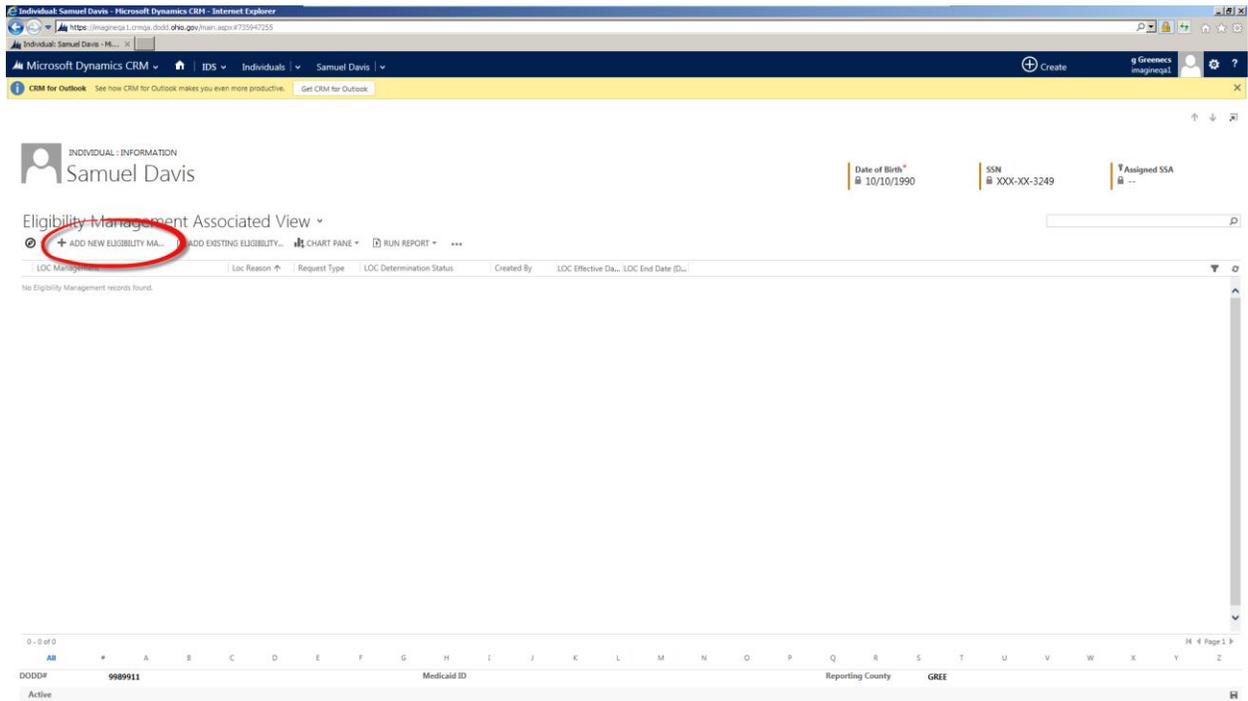
6. Start Eligibility Process - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



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



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.

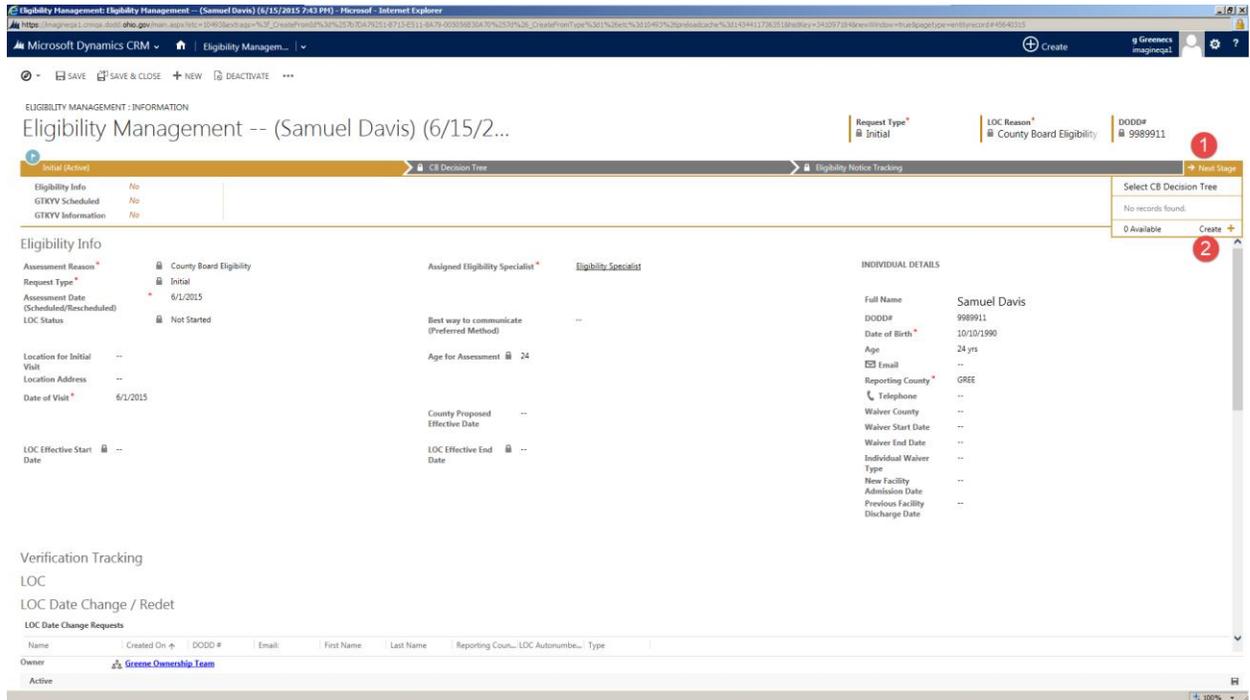
The screenshot shows the 'New Eligibility Management' form in Microsoft Dynamics CRM. The form is divided into several sections: 'Eligibility Info', 'Assigned Eligibility Specialist', 'Individual Details', and 'Verification Tracking'. Red callouts are placed over the following elements:

- 1: The 'SAVE' button in the top navigation bar.
- 2: The 'County Board Eligibility' field.
- 3: The 'Assessment Date' field, which is set to 6/2/2015.
- 4: The 'Assigned Eligibility Specialist' dropdown menu, which shows 'Eligibility Specialist' and 'Look Up More Records'.
- 5: The 'Date of Visit' field, which is set to 6/2/2015.

Other visible fields include 'Request Type' (Initial), 'LOC Reason' (County Board Eligibility), 'DODD#' (9989911), 'Assessment Reason' (Initial), 'Assessment Date' (6/2/2015), 'LOC Status' (Not Started), 'Location for Initial Visit', 'Location Address', 'LOC Effective Start Date', 'Best way to communicate (Preferred Method)', 'Age for Assessment', 'County Proposed Effective Date', 'LOC Effective End Date', and 'Individual Details' (Full Name: Samuel Davis, DODD#: 9989911, Date of Birth: 10/10/1990, Age: 24 yrs, Reporting County: GREE, etc.).



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).



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

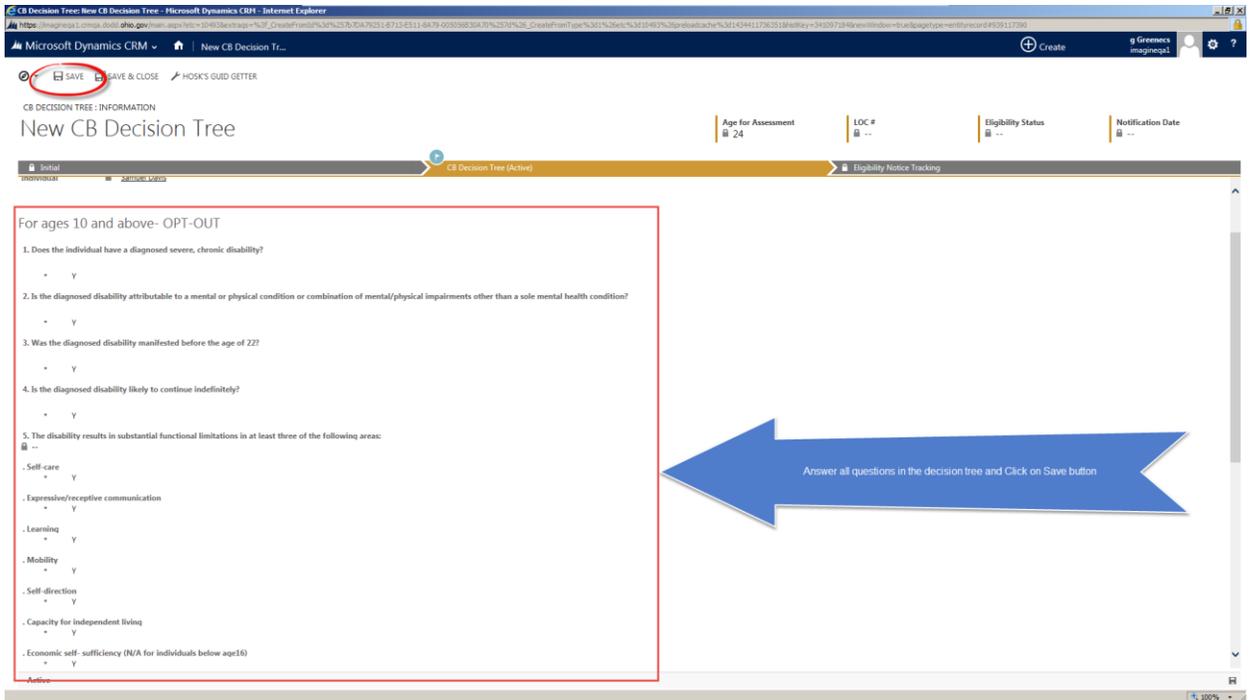
1. Does the individual have a diagnosed severe, chronic disability?
2. Is the diagnosed disability attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?
3. Was the diagnosed disability manifested before the age of 22?
4. 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

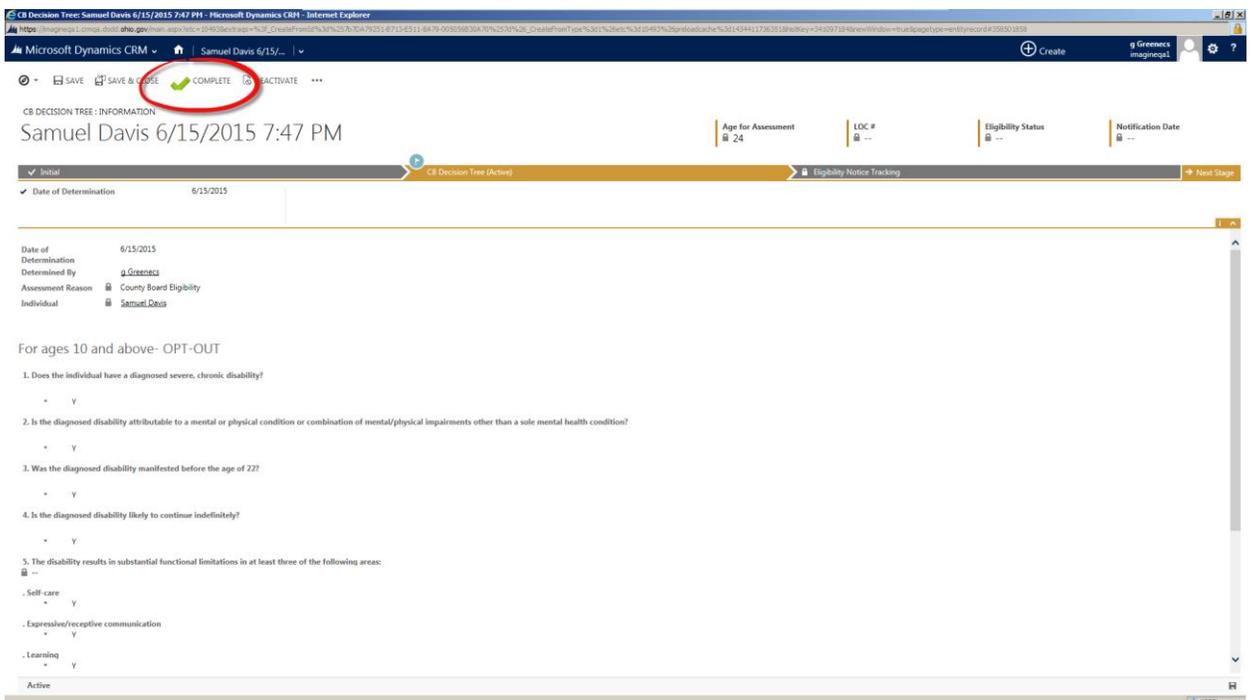
12. Answer all the questions on **Decision Tree**

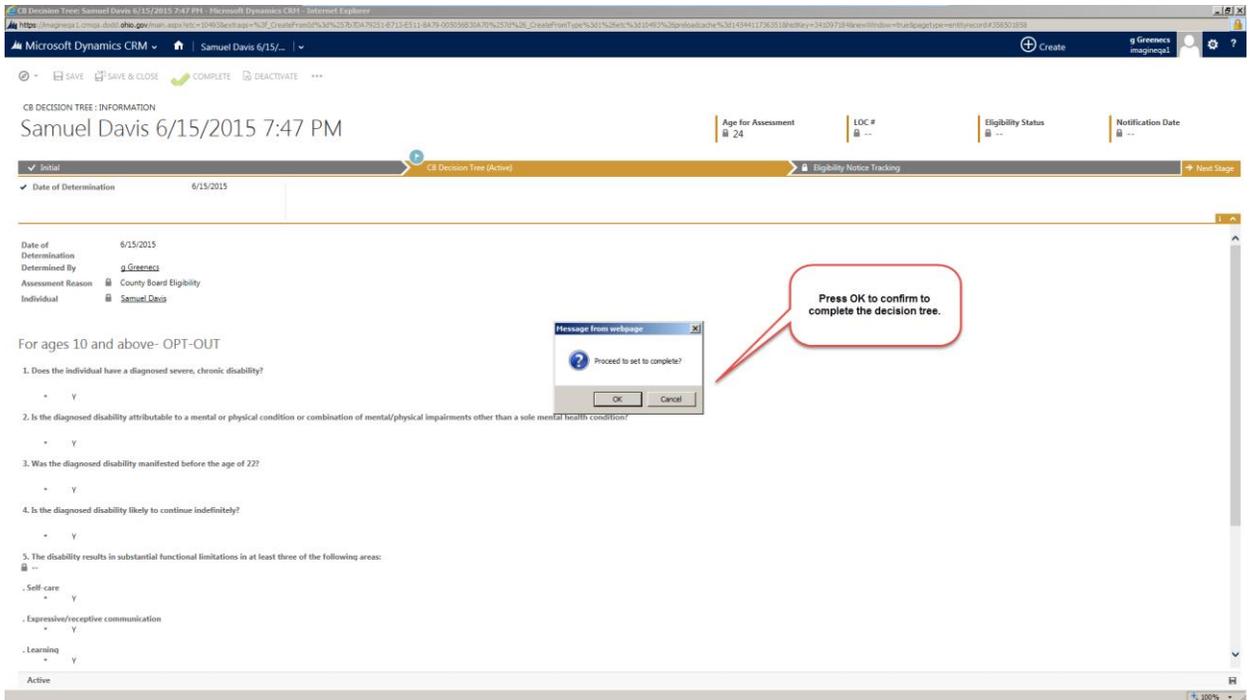
13. **Save** or **Save and Close** at any time by clicking on the save button or the save and close button from top of this screen



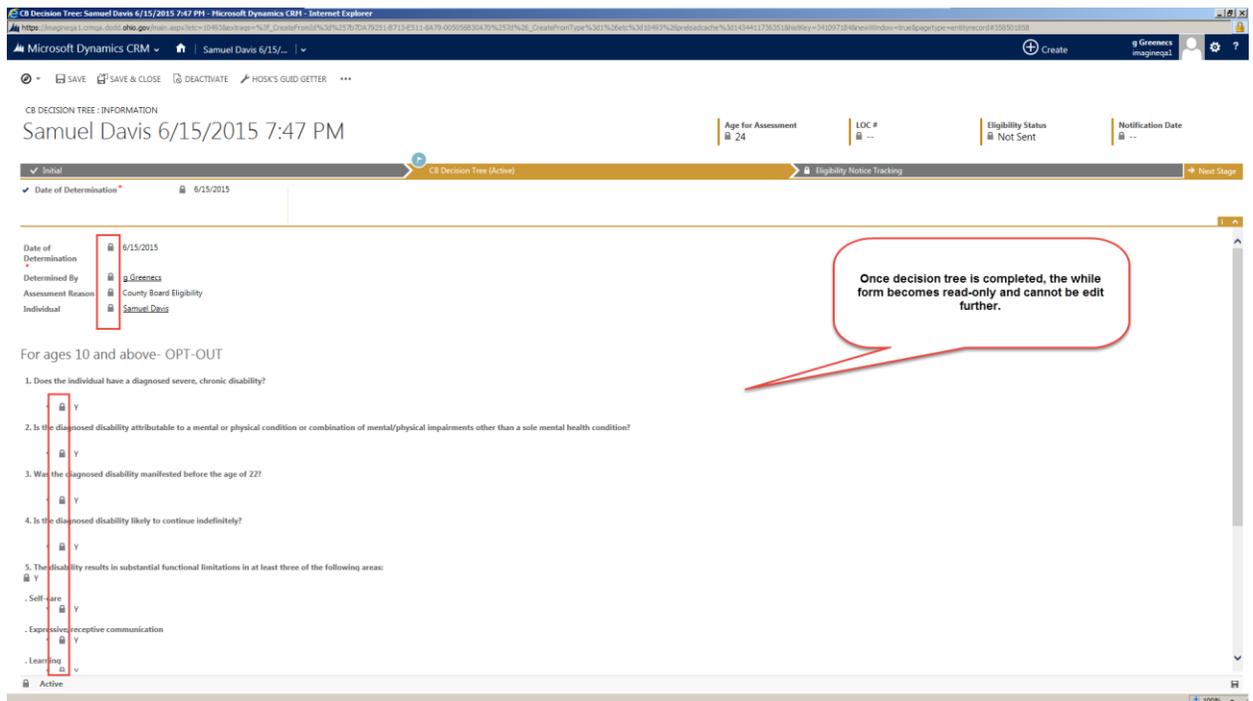


14. Click on the **COMPLETE** button (appears only after Save) from top of this screen





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.



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

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: 6/15/2015

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:
 Y

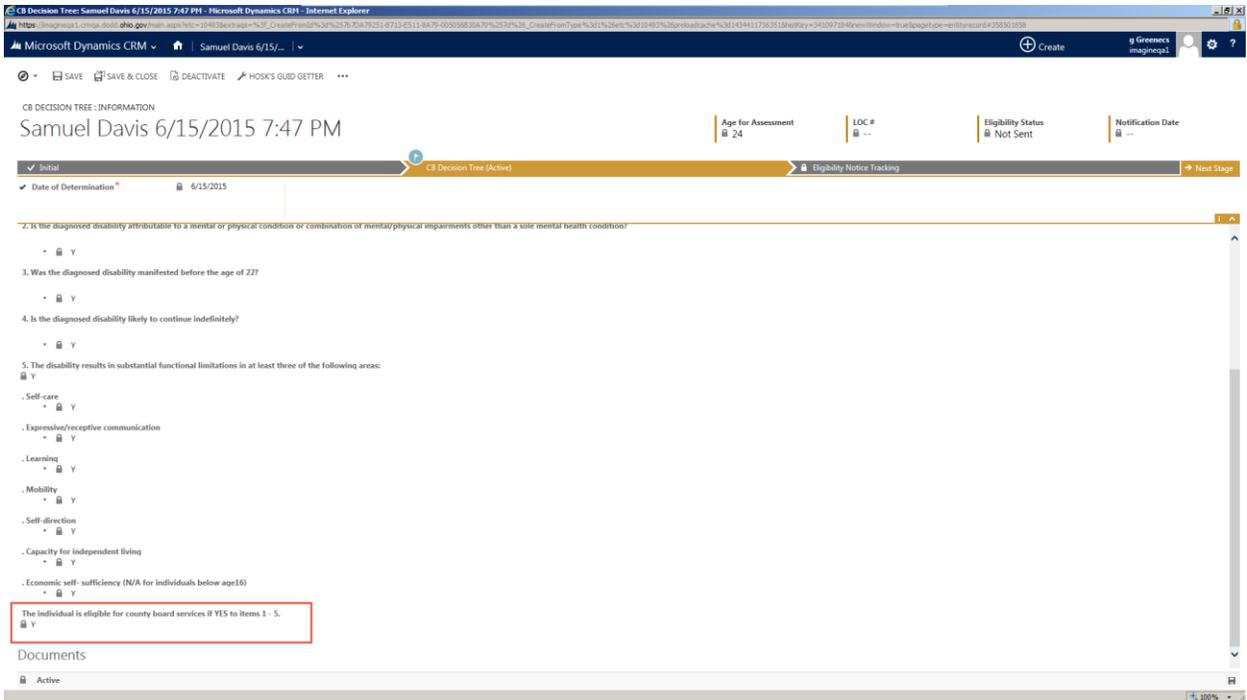
- Self-care
 Y
- Expressive/receptive communication
 Y
- Learning
 Y
- Mobility
 Y
- Self-direction
 Y
- Capacity for independent living
 Y
- Economic self-sufficiency (N/A for individuals below age16)
 Y

The individual is eligible for county board services if YES to items 1 - 5.
 Y

Documents
 Active

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

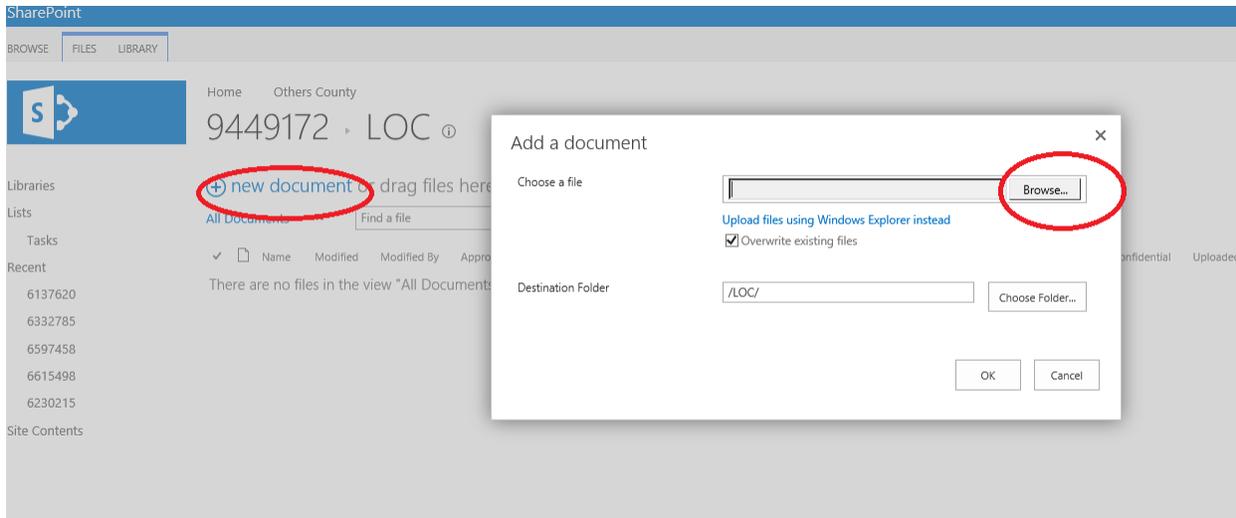




18. You can upload document to SharePoint at any time – before or after Completing the Decision Tree

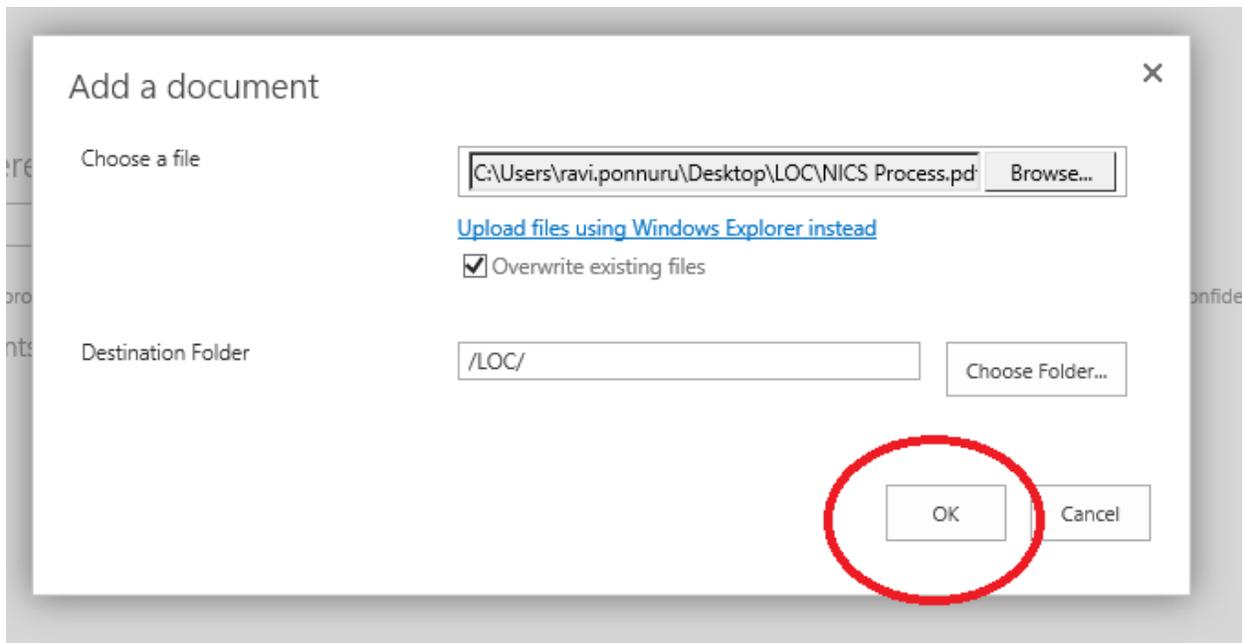


19. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document to SharePoint**
 1. Click on **+new document**
 2. Click on **chose file**



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



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

The screenshot shows the Microsoft Dynamics CRM interface for a 'CB Decision Tree' record. The record is for 'Samuel Davis 6/15/2015 7:47 PM'. The current stage is 'Eligibility Notice Tracking', and the 'Next Stage' button is visible. A dropdown menu is open, showing 'Select Eligibility Notice Tracking' with '1 Available' listed below it. The main content area displays a decision tree with the following questions and answers:

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

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)



Eligibility Notice Tracking: Samuel Davis (6/15/2015 7:49 PM) -- Eligibility N...

Individual: Samuel Davis | LOC #: -- | Age for Assessment: 24

Documentation of Eligibility / Ineligibility Notice

Type of Notification	Eligible
Date Notification Sent	6/15/2015
To whom it was sent	--
Assigned SSA	--
Deadline for first contact	--

CustomerGuide Contact Details

Name	--
Contact	--

Eligibility/Ineligibility Letter

[Eligibility Letter - Age 6 and above](#)

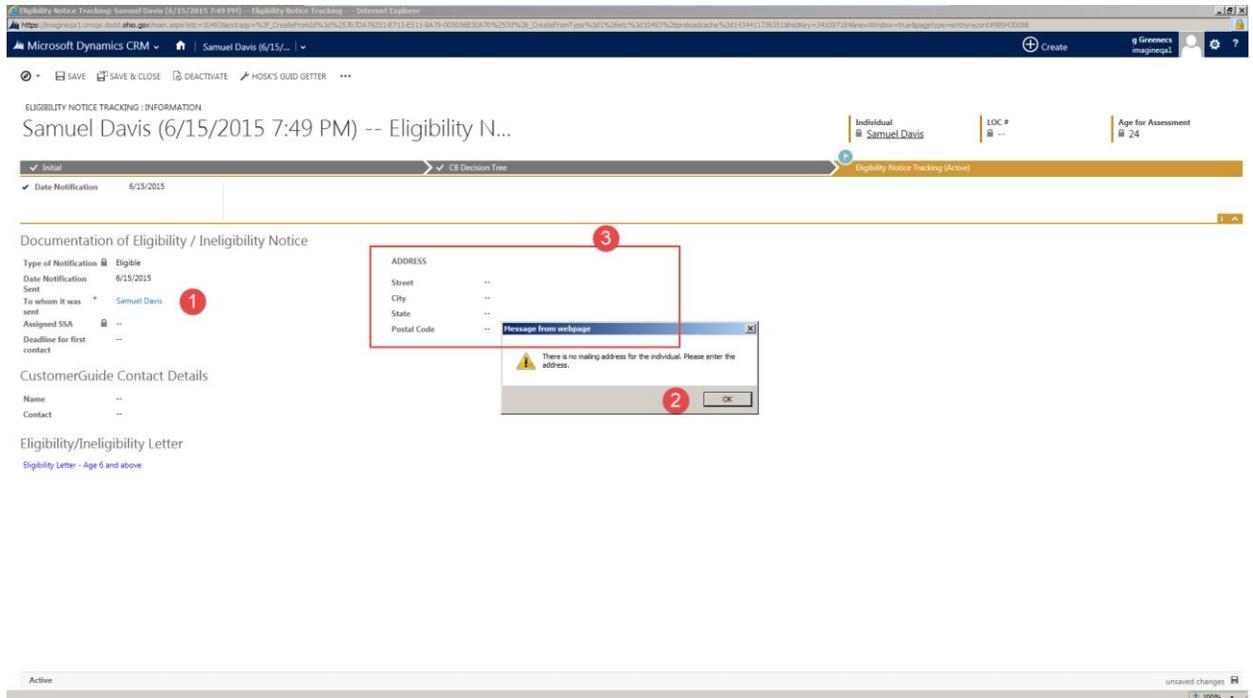
Active | unsaved changes | 100%

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.



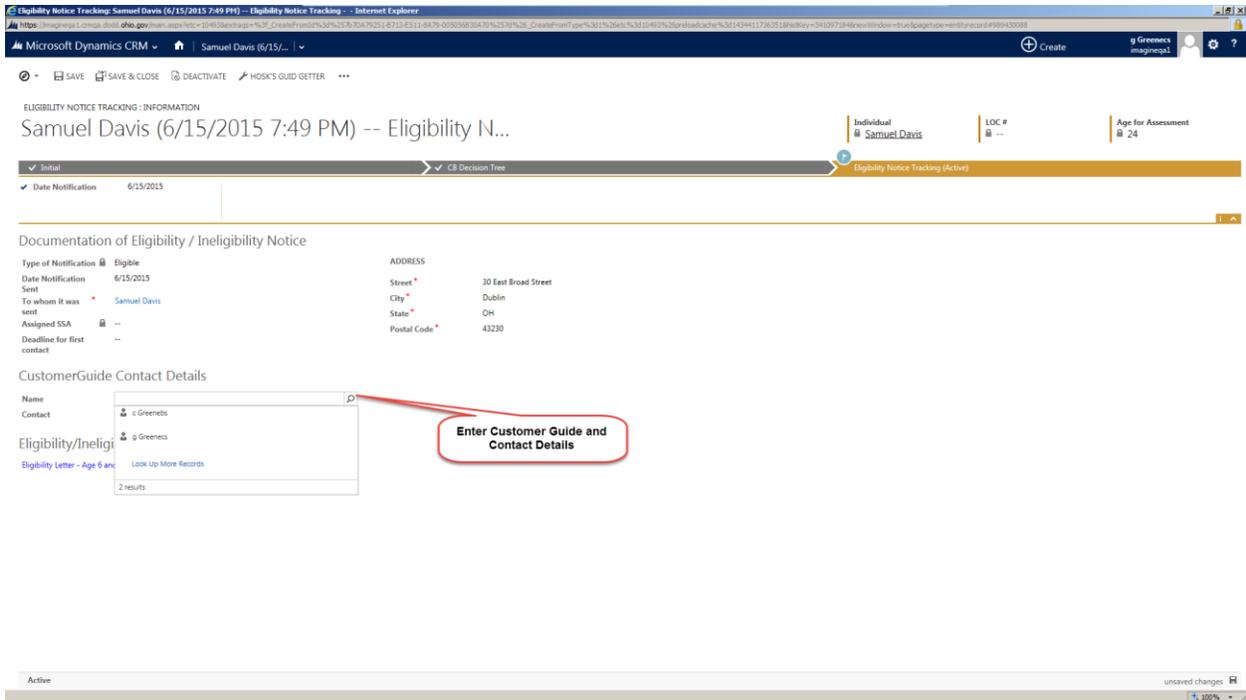


2. If the person to whom the mail has to be sent does not have mailing address, system will prompt you to enter mailing address. Press OK to confirm.

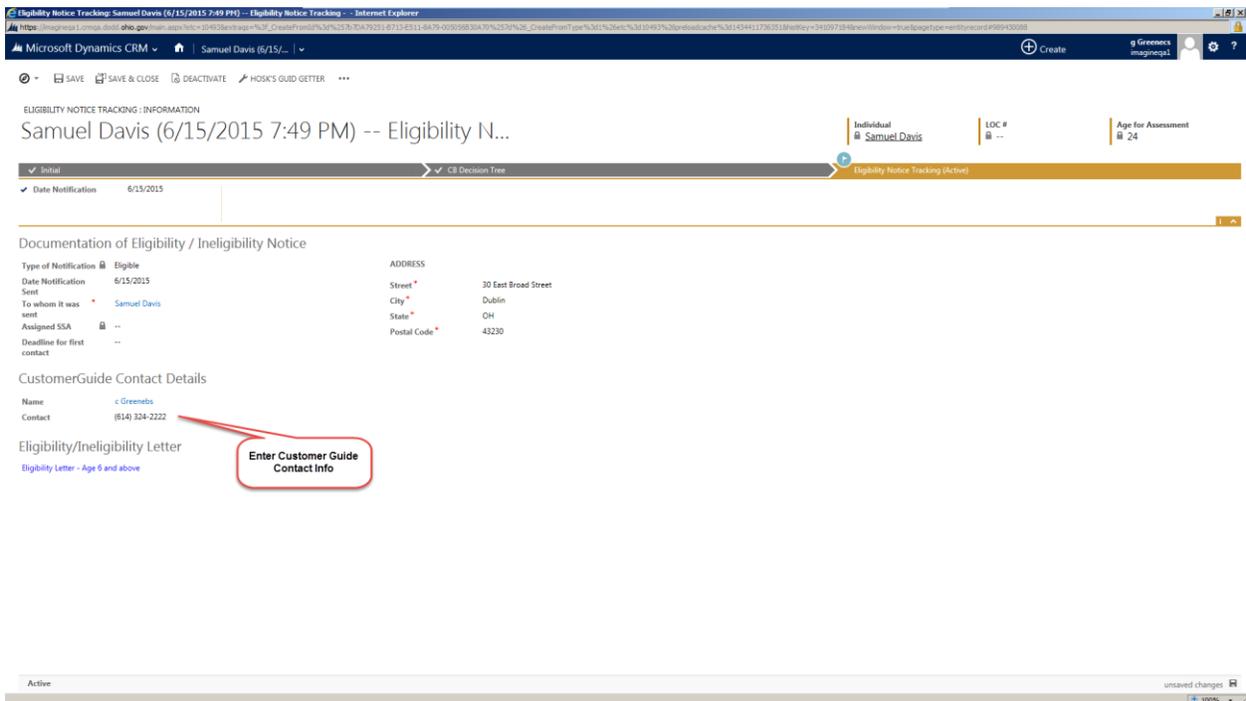
3. **Enter the mailing address** for the individual. Address will be prefilled if individual have a mailing address on his profile

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.



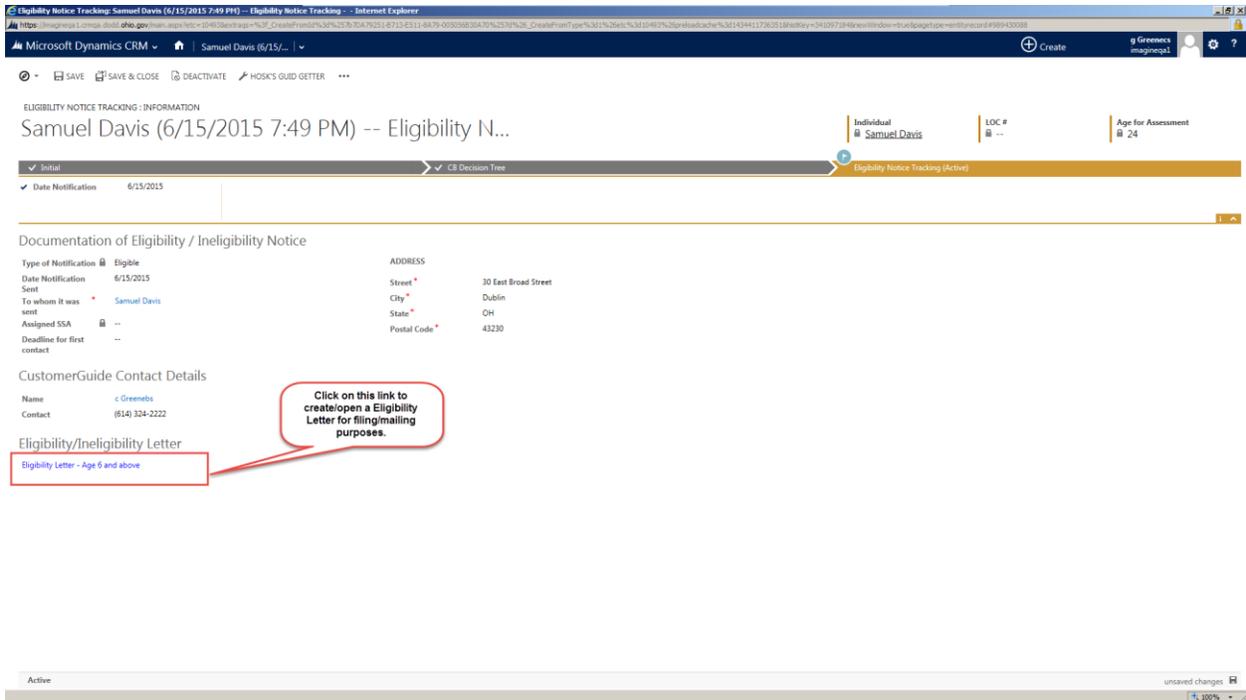


7. Enter Customer Guide’s contact information

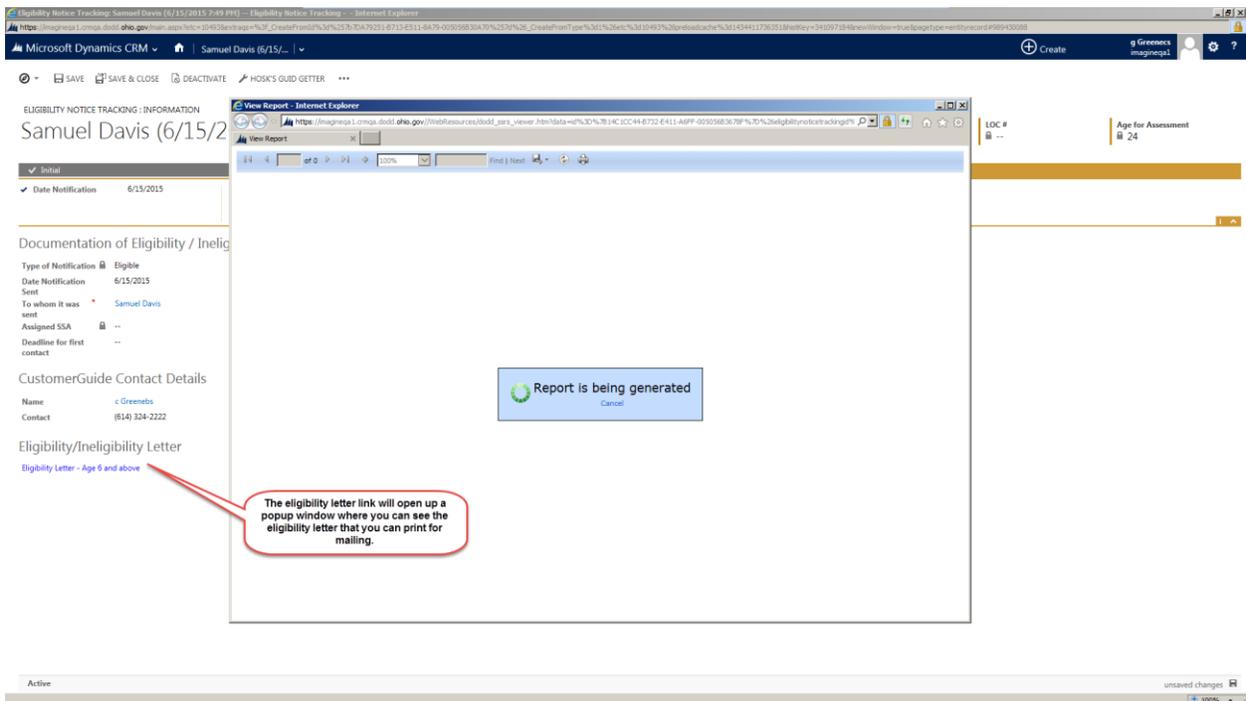


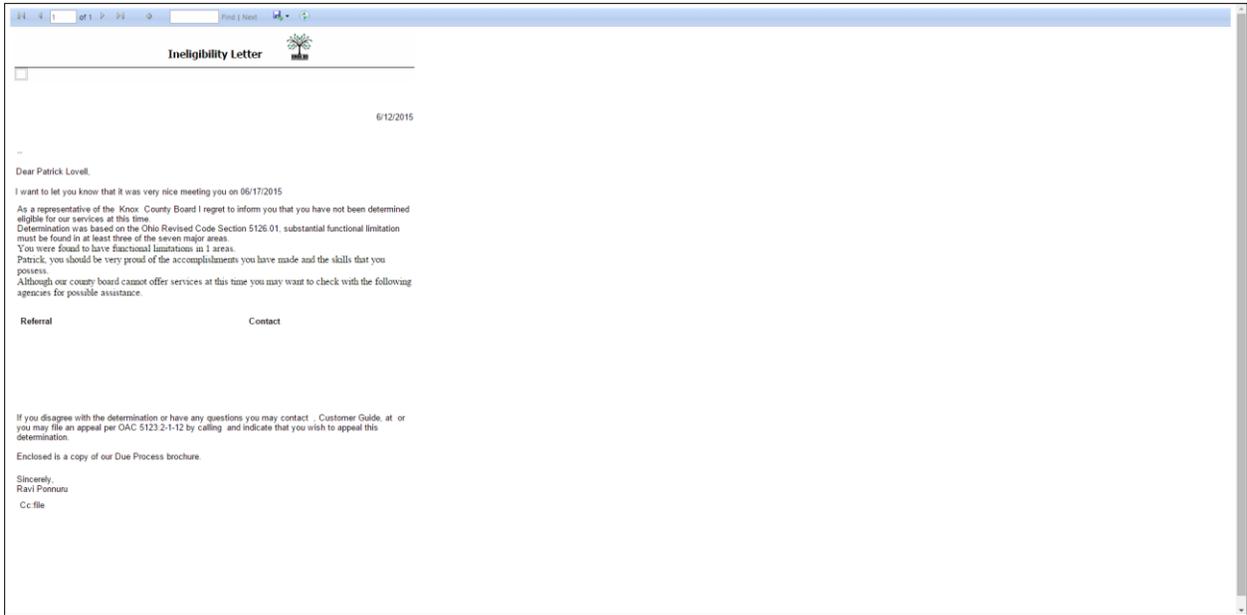
8. Open the Eligible/Ineligible Notice by clicking on the link under the Eligibility/Ineligibility Letter Tab



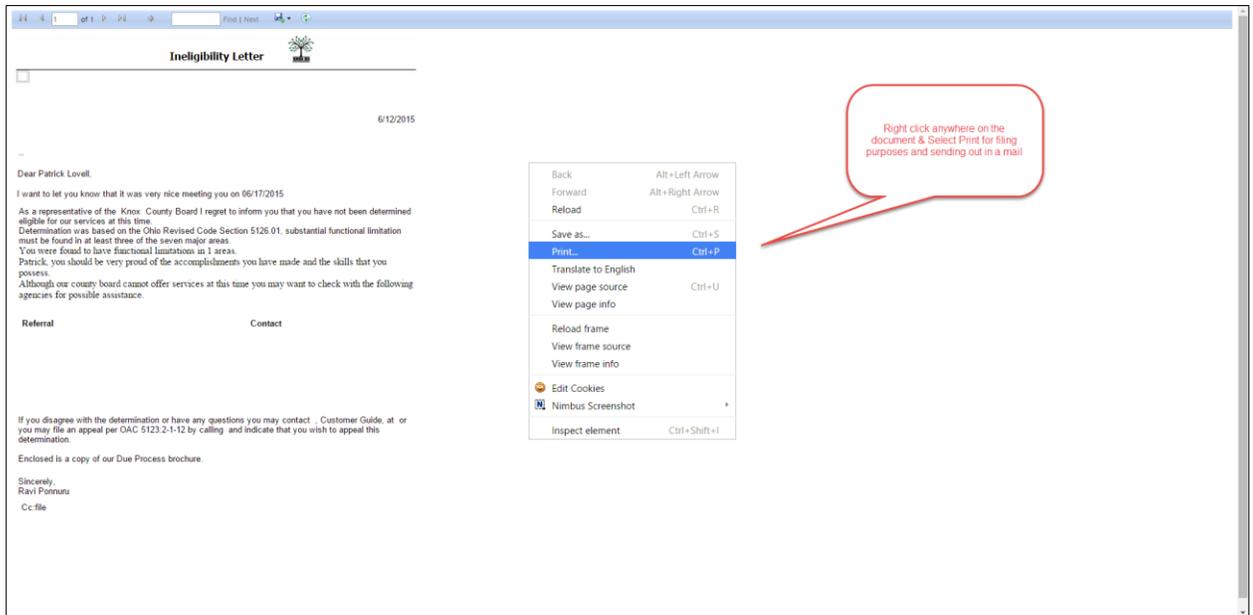


9. Eligible/Ineligible Notice will open in a new tab





10. 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)

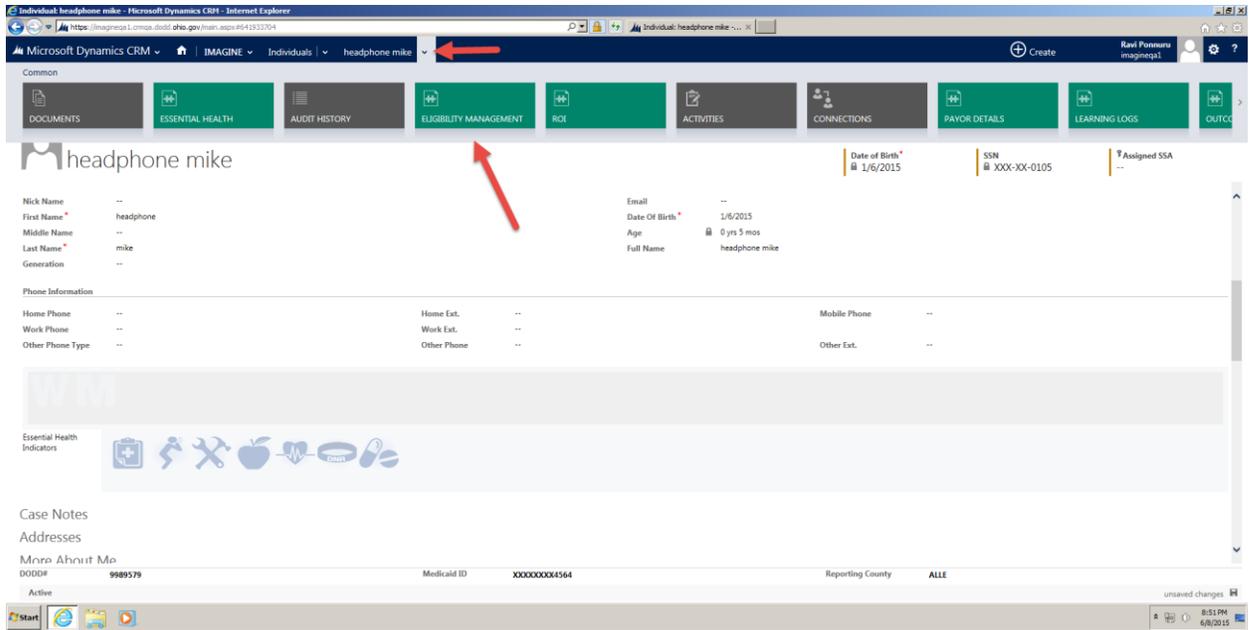
1. To start a LOC for county board eligibility for an Individual, **Search for individual** by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box.
3. **Individual record will show up** if individual exist in your county
4. Double click on individual record 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 is titled 'INDIVIDUAL: INFORMATION' and displays various fields and sections:

- Header:** Microsoft Dynamics CRM, IMAGINE, Individuals, headphone mike, Create, Earl Pommero (magnum), ?
- Navigation:** SAVE, SAVE & CLOSE, CONNECT, ASSIGN
- Individual Information:**
 - Nick Name: --
 - First Name: headphone
 - Middle Name: --
 - Last Name: mike
 - Generation: --
 - Email: --
 - Date Of Birth: 1/5/2015
 - Age: 0 yrs 5 mos
 - Full Name: headphone mike
 - Date of Birth: 1/5/2015
 - SSN: XXX-XX-0105
 - Assigned SSA: --
- Phone Information:**
 - Home Phone: --
 - Work Phone: --
 - Other Phone Type: --
 - Home Ext.: --
 - Work Ext.: --
 - Other Phone: --
 - Mobile Phone: --
 - Other Ext.: --
- Essential Health Indicators:** (Icons for medical, fitness, nutrition, etc.)
- Case Notes:**
- Addresses:**
- More About Me:**
 - DOB# 9989579
 - Medicaid ID XXXXXXXX4564
 - Reporting County ALLE
 - Active
- Footer:** unsaved changes

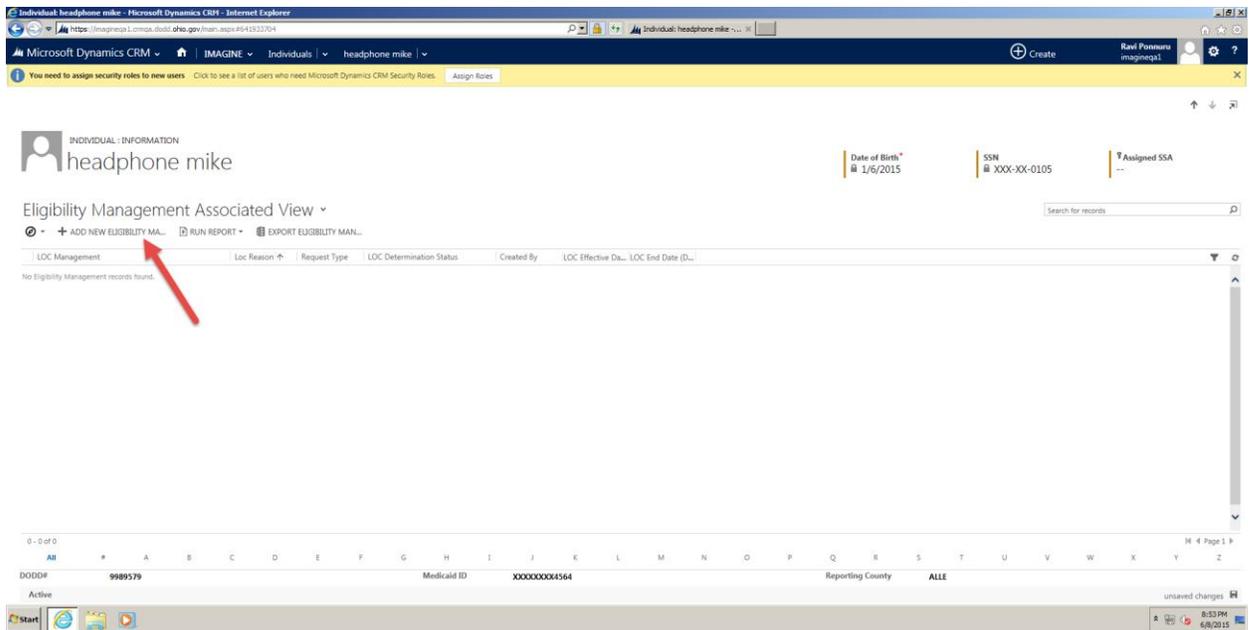
6. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name





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

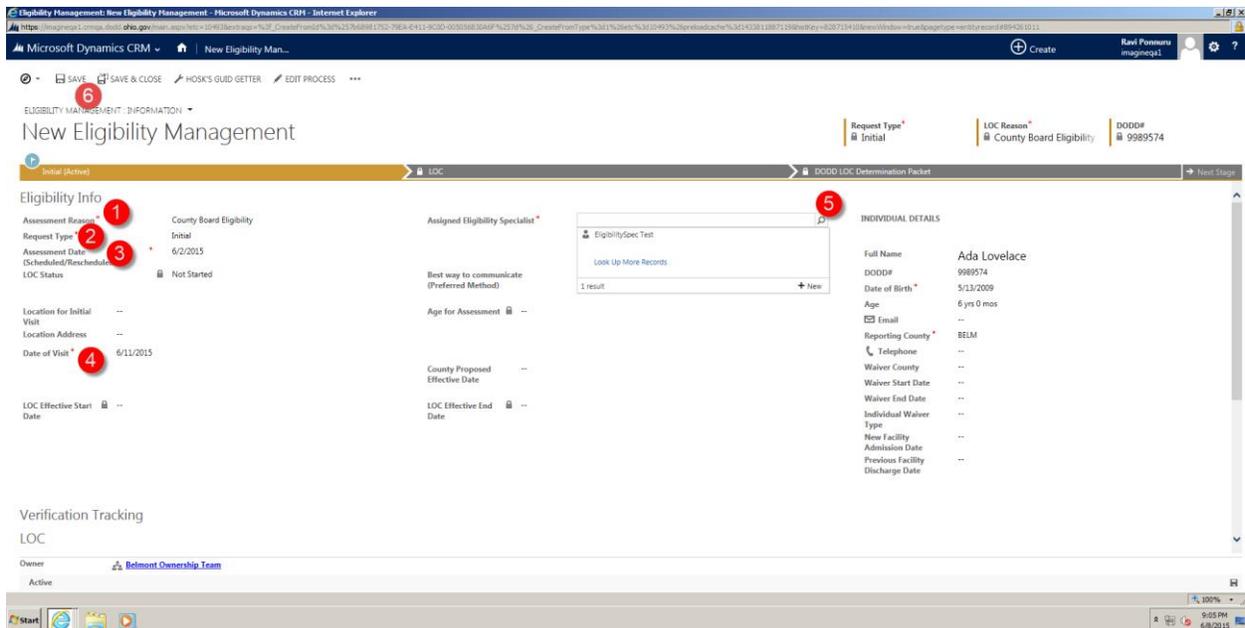
8. **Add New Eligibility Management**



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 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

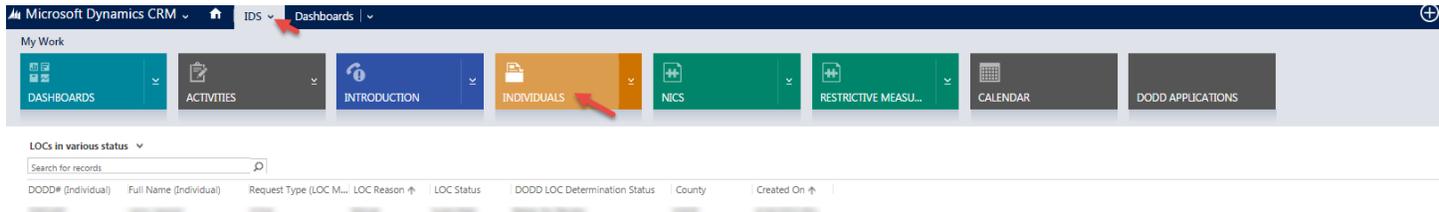


10. **Cannot Move to LOC stage (has to be an evaluator)**

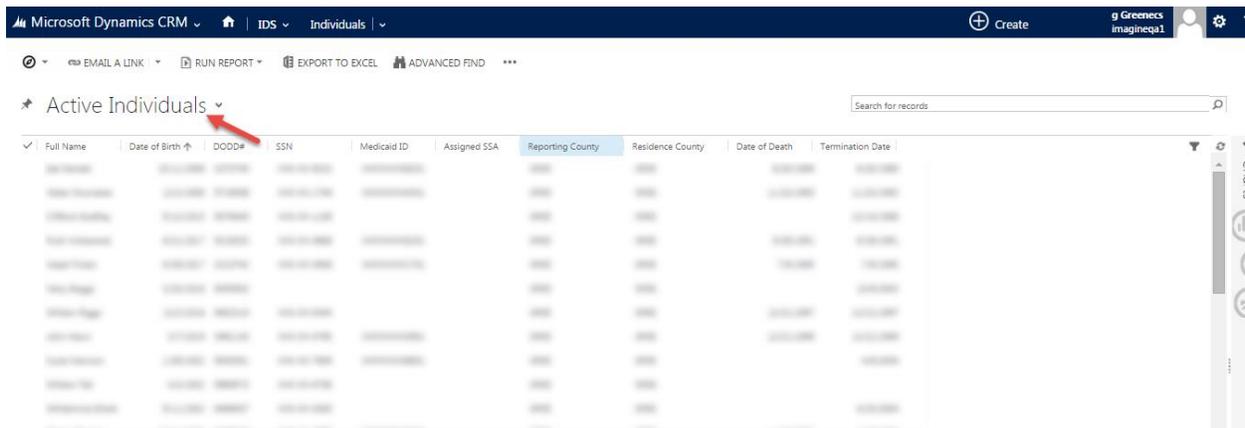


LOC for Waiver Eligibility

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**



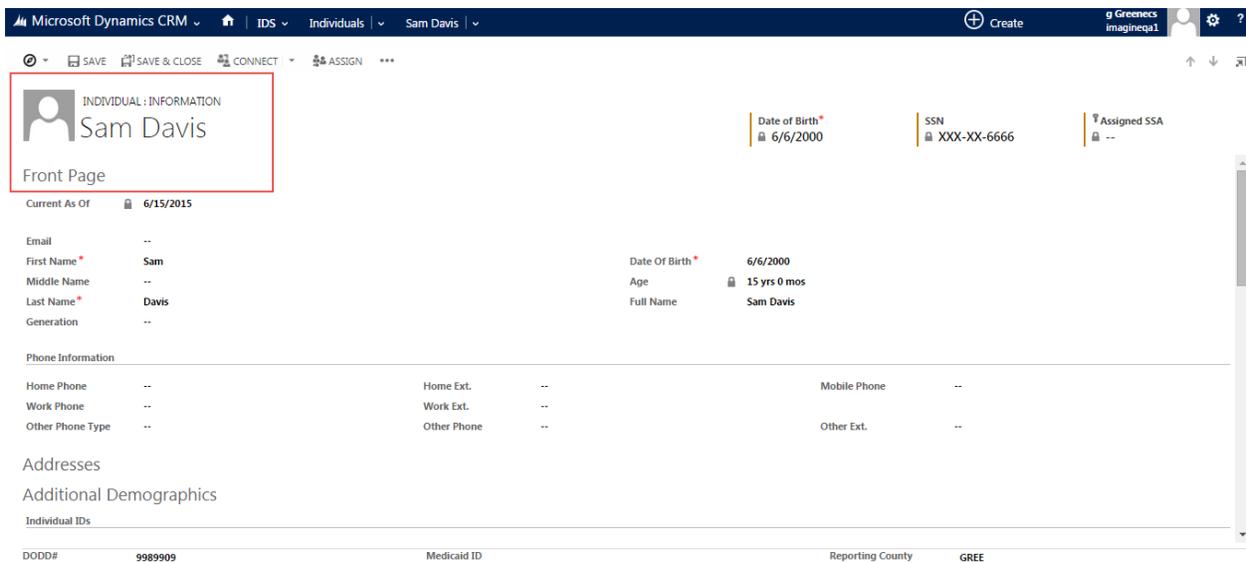
3. **Search for individual** by typing name in search box
4. Hit **Enter** or click on the magnifying glass next to search box
5. **Individual record will show up** if individual exist in your county



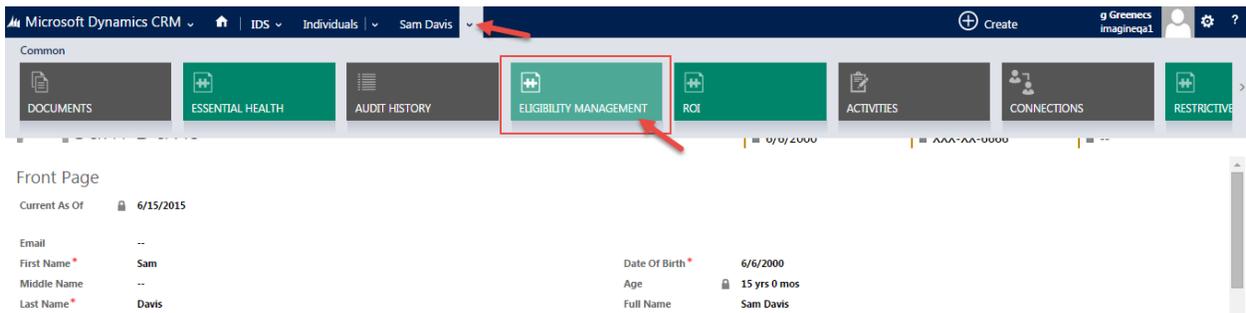


6. Double click on individual record to open individual's record

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

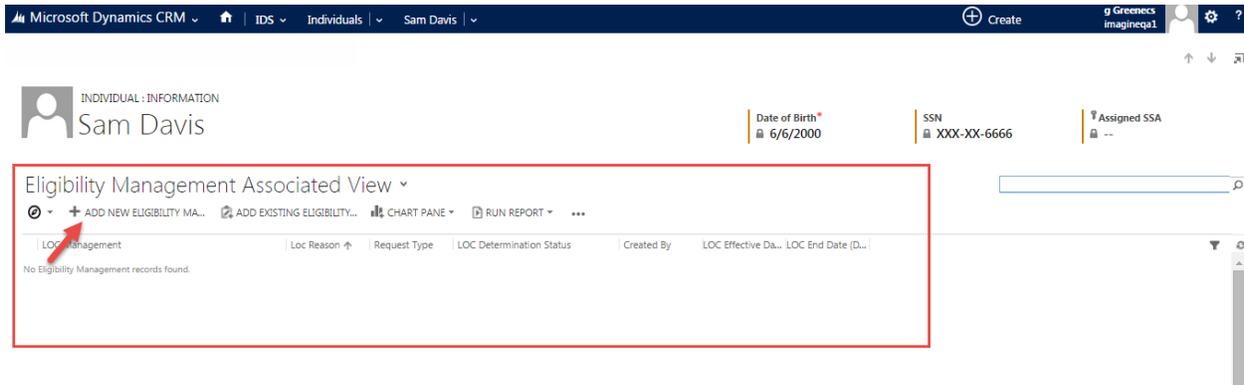


8. Start Eligibility Process - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual's name



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 imagineqa1

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

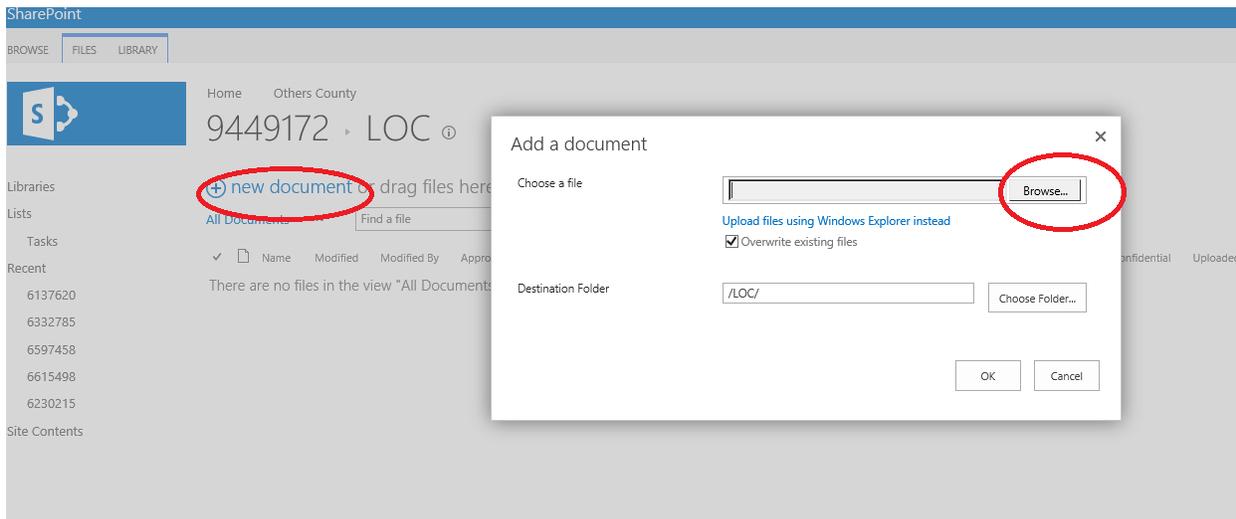
Assessment Reason	Waiver 1	Assigned Eligibility Specialist	--
Request Type	Initial 2	Waiver Type	IO 5
Assigned Evaluator	g Greenecs 3	Best way to communicate(Preferred Method)	--
Assessment Date (Scheduled/Rescheduled)	6/10/2015 4	Age for Assessment	15
LOC Status	Not Started	Proposed Effective Date	--
Location for Initial Visit	--	LOC Effective Start Date	--
Location Address	<input type="text"/>	LOC Effective End Date	--
Date of Visit	--		

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	--

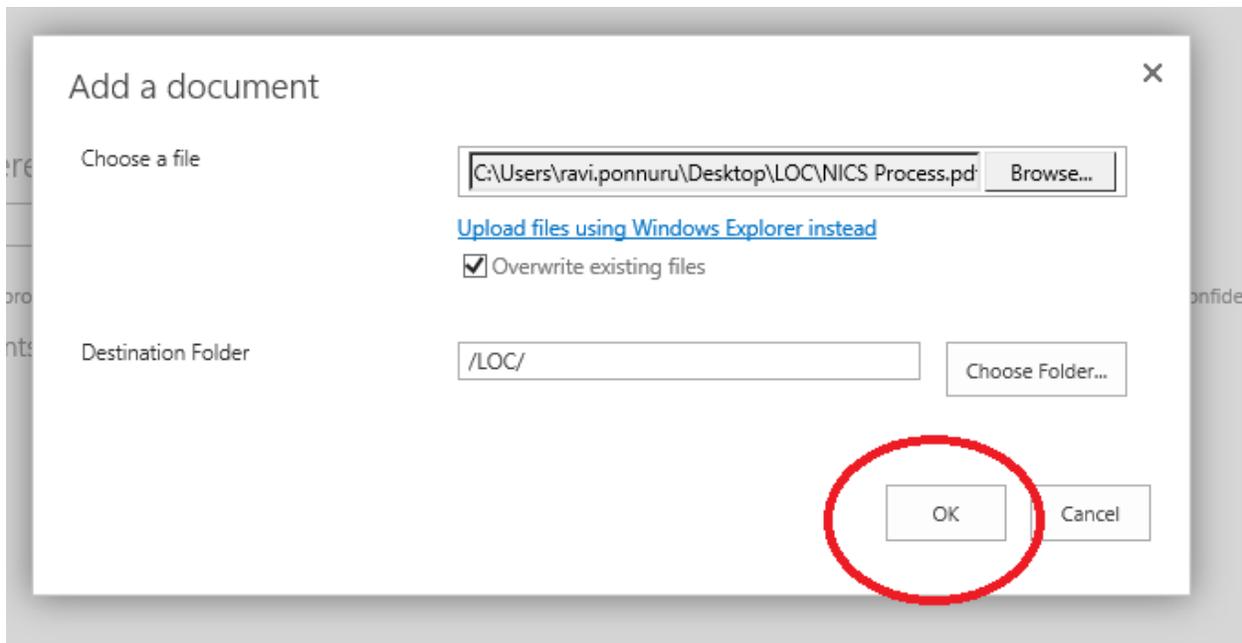


12. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document to SharePoint**
 10. Click on **+new document**
 11. Click on **chose file**



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 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



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 'Request Type' is 'Initial' and the 'LOC Reason' is 'Waiver'. The 'DODD#' is '9989909'. The 'Primary Verification' field is set to 'Yes'. The 'Eligibility Info' section shows 'Assessment Reason' as 'Waiver', 'Request Type' as 'Initial', 'Assigned Evaluator' as 'Greenecs', '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'.

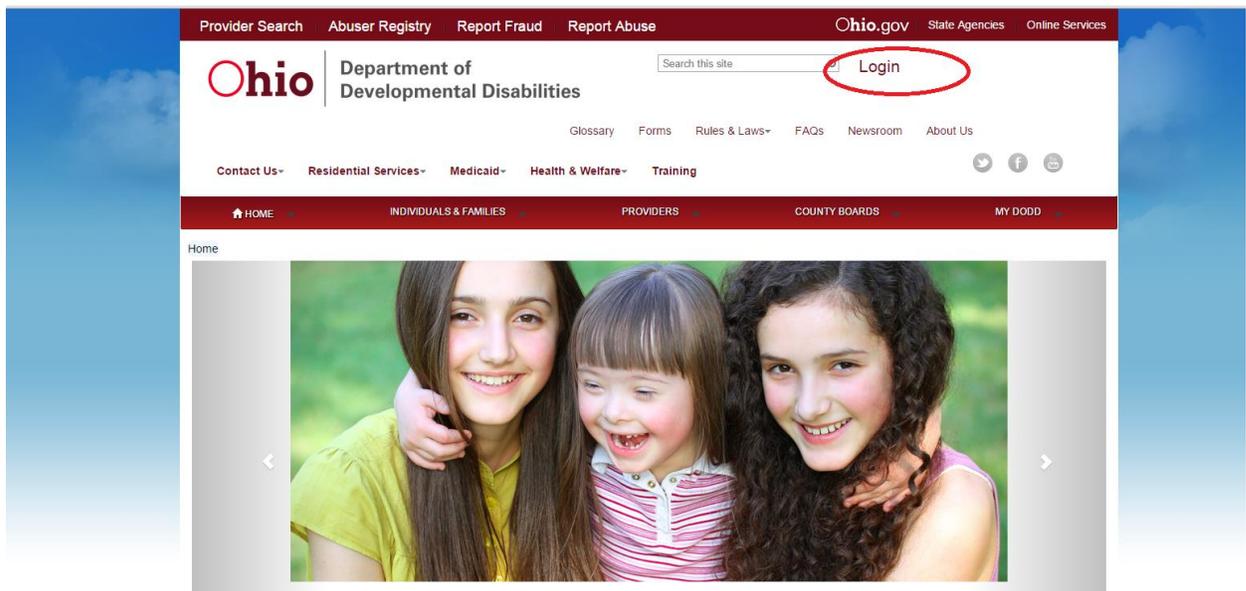
14. **Cannot Move to LOC stage (has to be an evaluator)**



2. Eligibility Specialist (IDS Edit)

Login

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

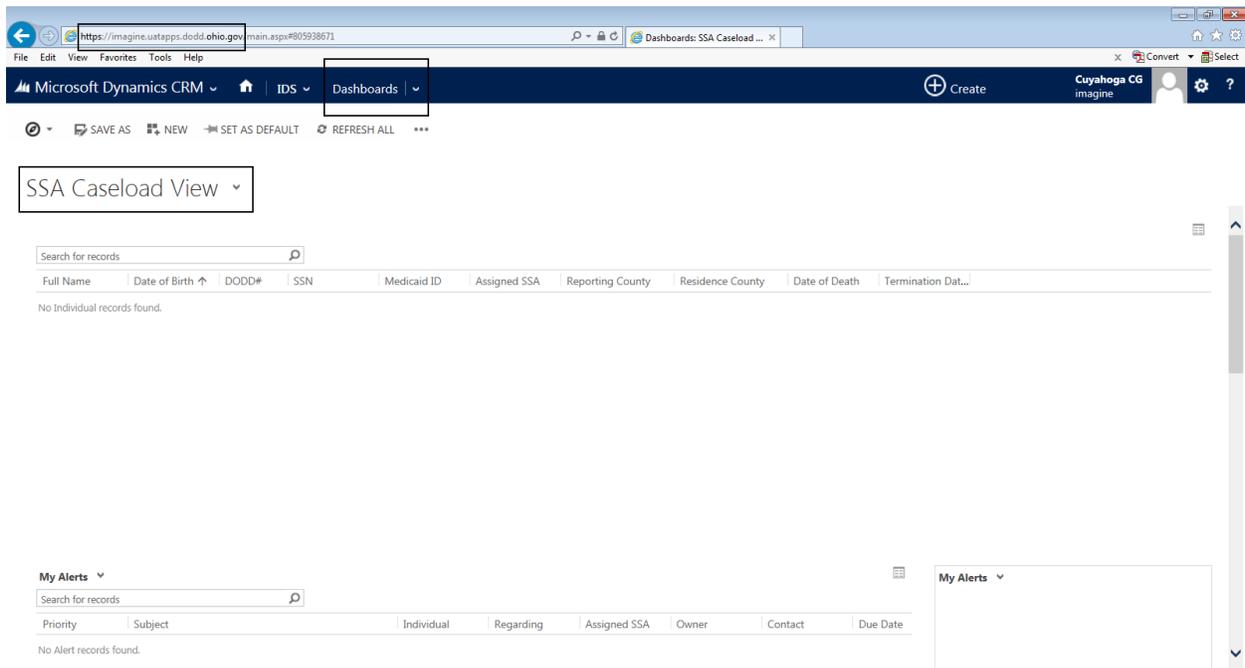


3. **Enter your User Name and Password**
(Role: Eligibility Specialist)

A screenshot of the login form for County Boards, Providers, and DODD Central Office. The form is titled 'Login for County Boards, Providers, and DODD Central Office'. It includes a warning message: '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, it says 'Type your user name and password.' There are two input fields: 'User name' with the text 'cgc' and 'Password' with masked characters. A 'Sign In' button is located below the password field. At the bottom left, there is a link 'Back to Portal' and at the bottom right, a link 'Forgot Password'.

Dashboard

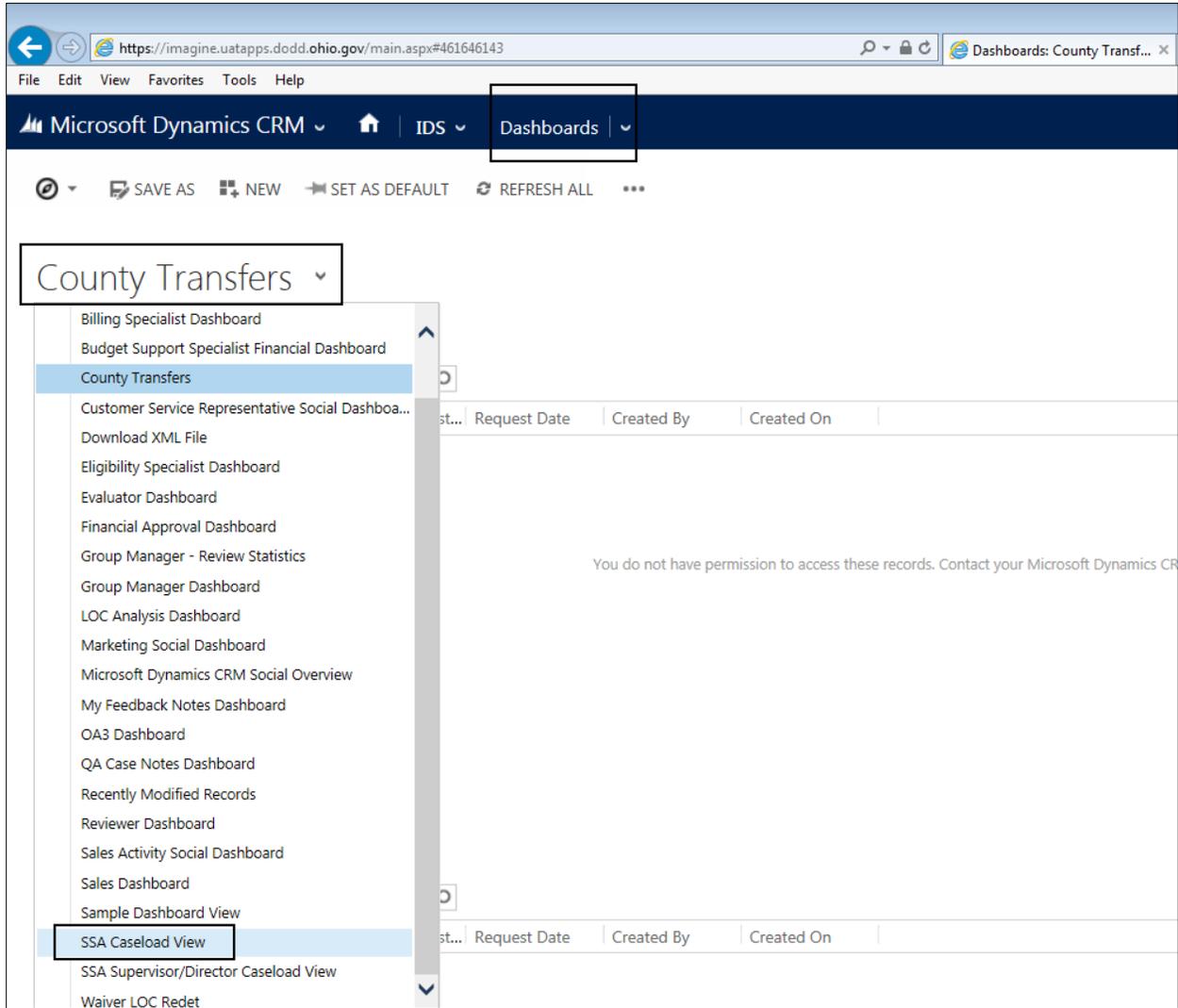
4. Once the user has logged in they will be taken to the Eligibility Specialist **Dashboard**



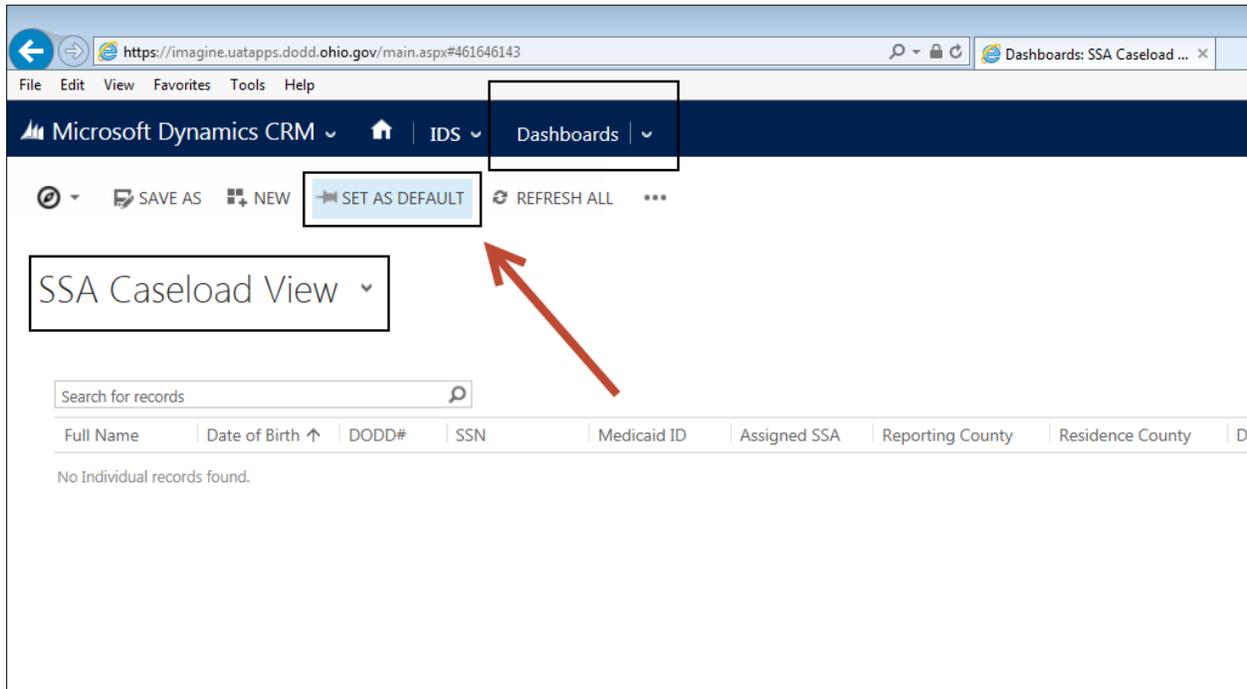
5. If you don't see the SSA Caseload View:

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.





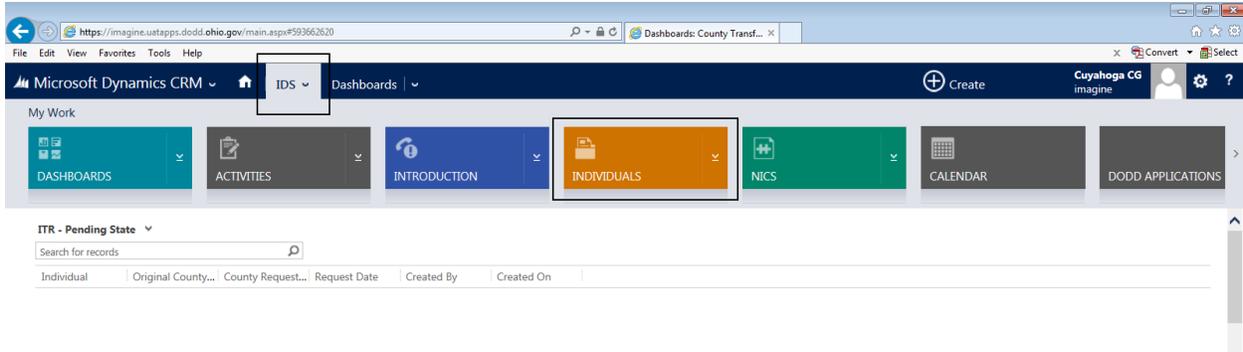
4. Finally, click on “Set as Default” on top of this dashboard page if you wish to pin this as your **Home** landing page.



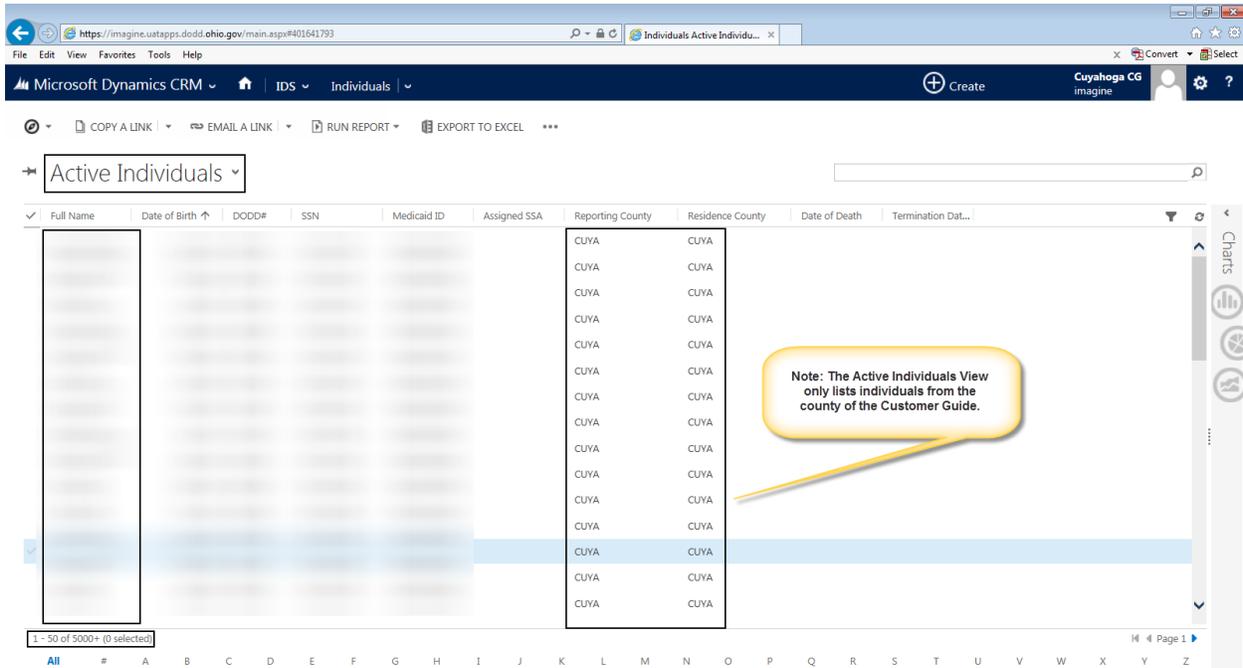
Access Individual

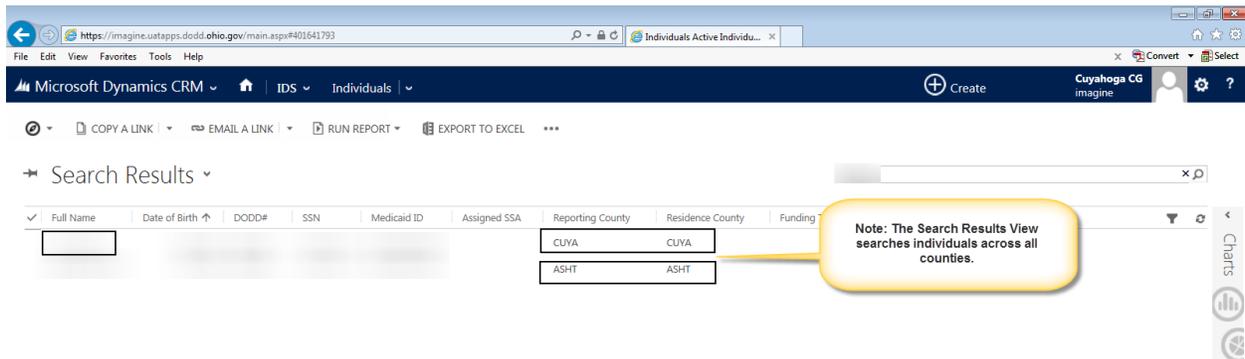
6. To access list of individuals in your county:
 1. Scroll over the **IDS** icon to display all of the tiles (entities) under the IDS application. Click the **INDIVIDUALS** tile.





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





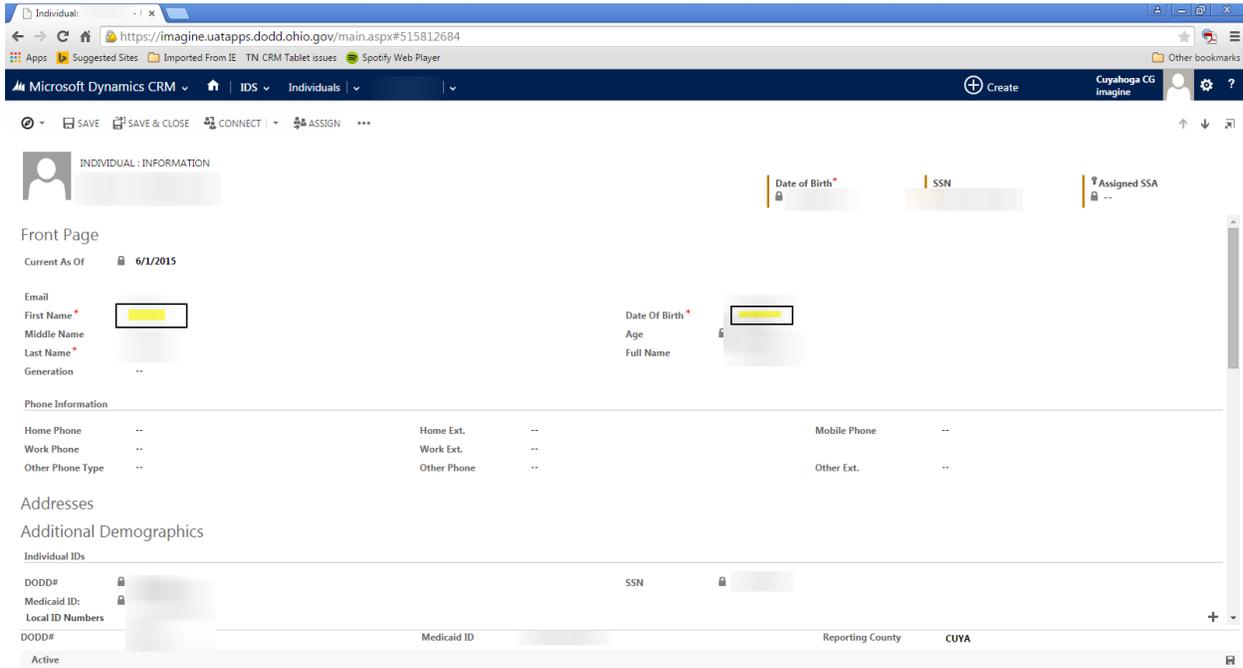
Edit Individual's Information

8. Edit an Individual's Front Page information

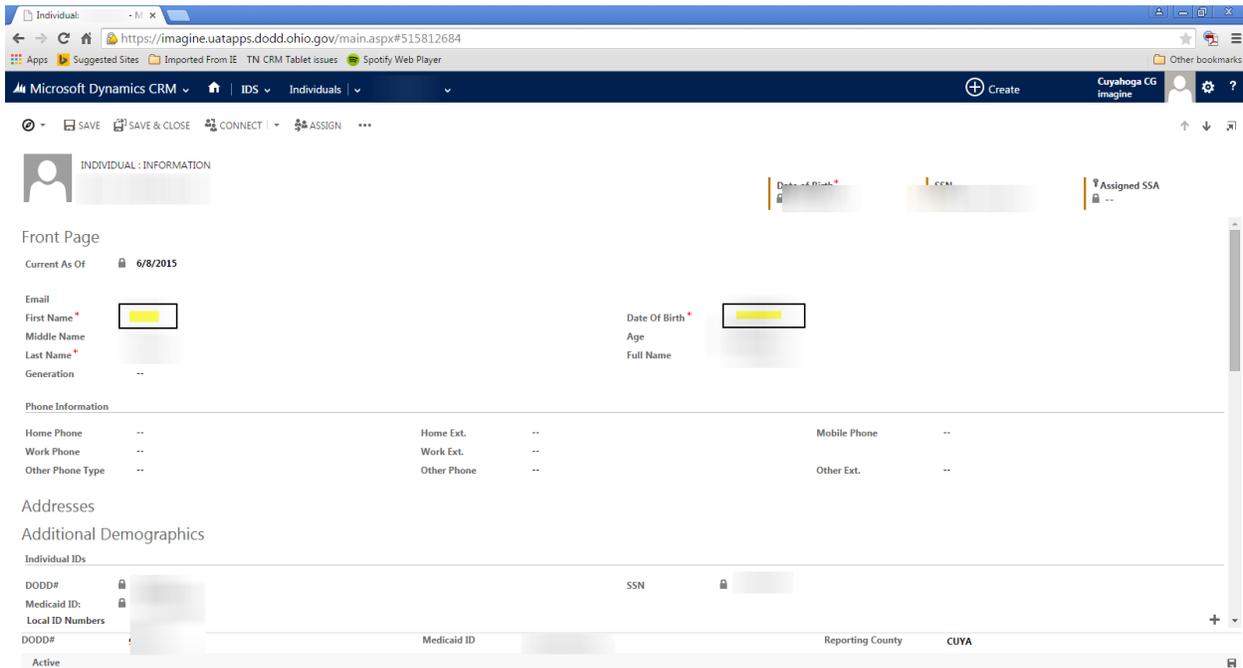
1. Open Individual detail Page and edit an individual's general information such as First Name, Middle Name, Last Name, Email, Date of Birth, Generation, Home Phone, Work Phone, Mobile Phone etc.



Before edit:



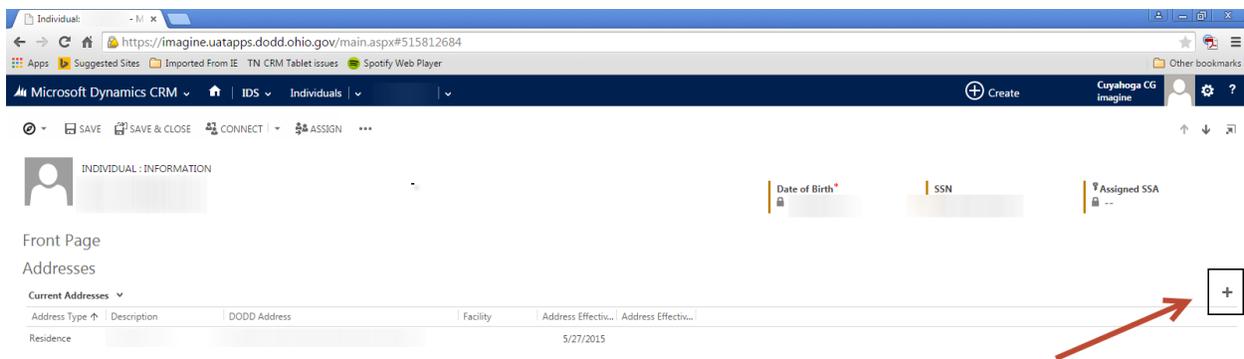
After edit:



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.

INDIVIDUAL ADDRESS : INFORMATION
New Individual Address

Individual
Judith Altfather

General

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

Address *
You must provide a value for Address.

Address Dates

Address Effective Begin Date *
6/11/2015

Address Effective End Date
..

4. Click the **+New** button

Address *

10 results

+ New



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

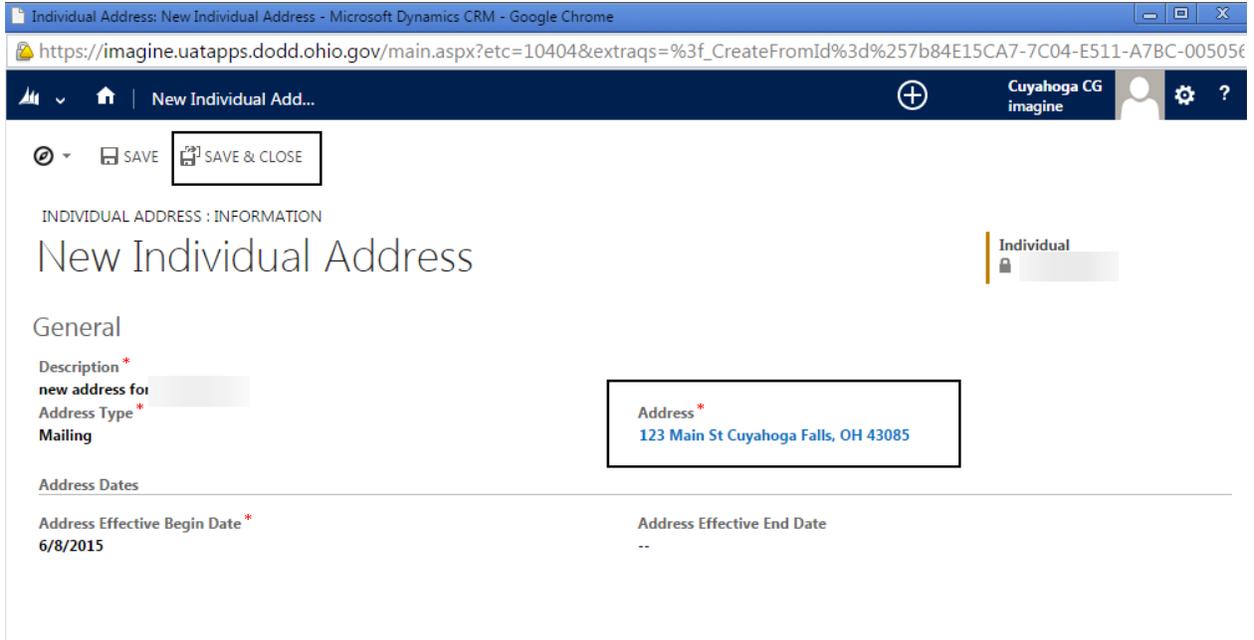
Zip* 43085

Facility

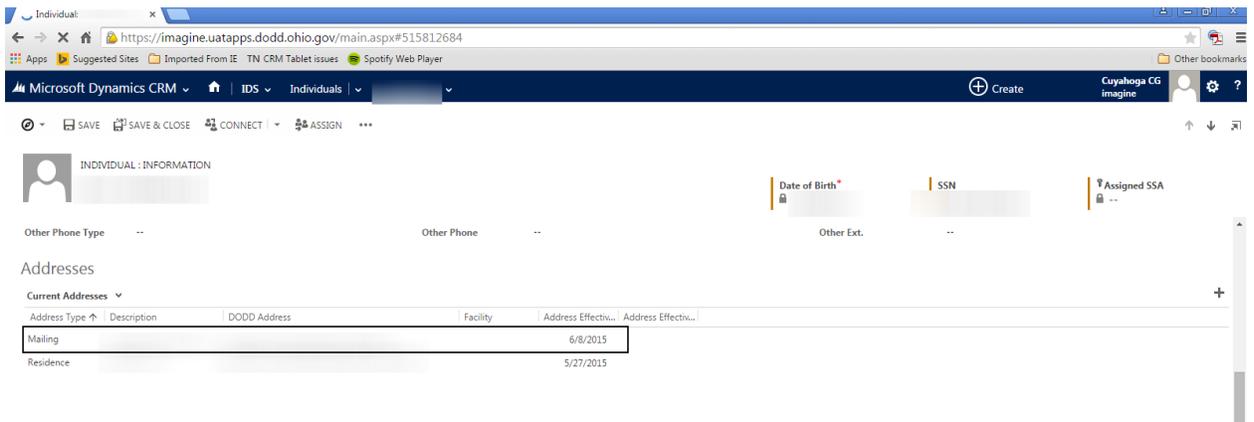
SAVE SAVE & CLOSE

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





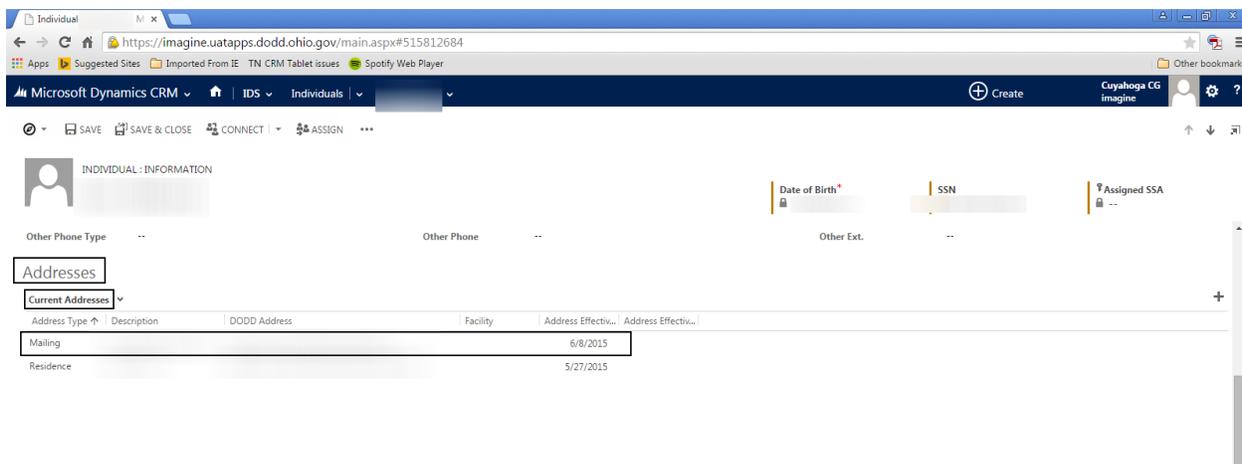
7. You will now see the new address listed under Current Addresses.



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.

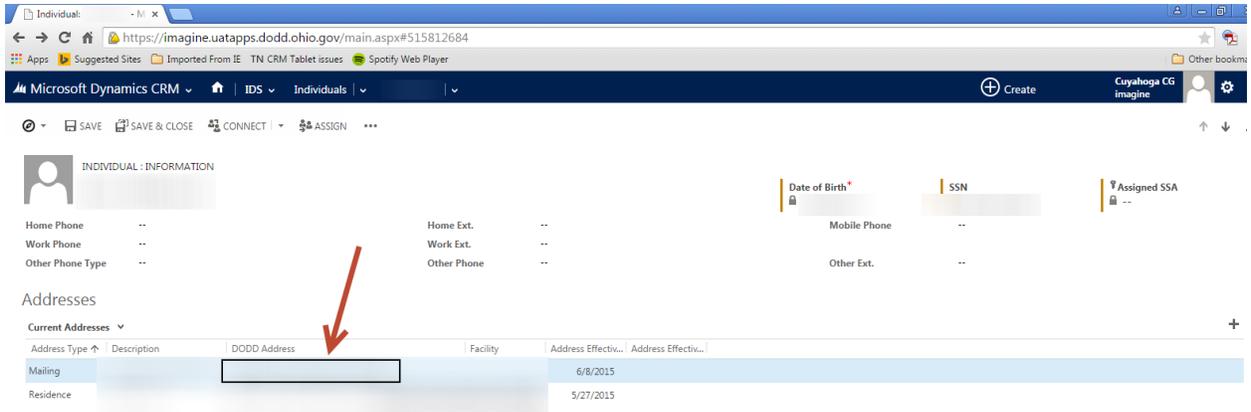


2. Click the field (Hyperlink) called **DODD Address** to open the Individual Address you would like to edit. This will take you directly to the *actual address* information.

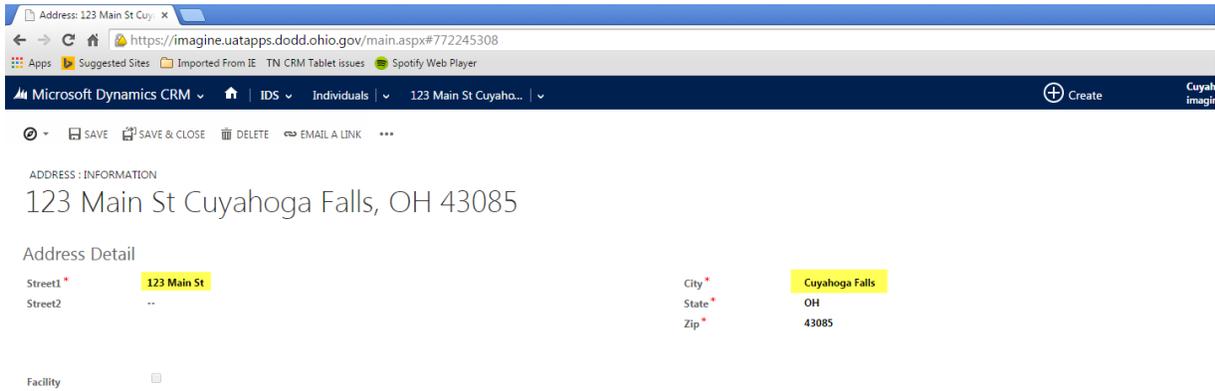
Note: Clicking the row instead of the DODD Address will allow you to edit the Description and Address Effective Begin Date but not the Address directly.

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

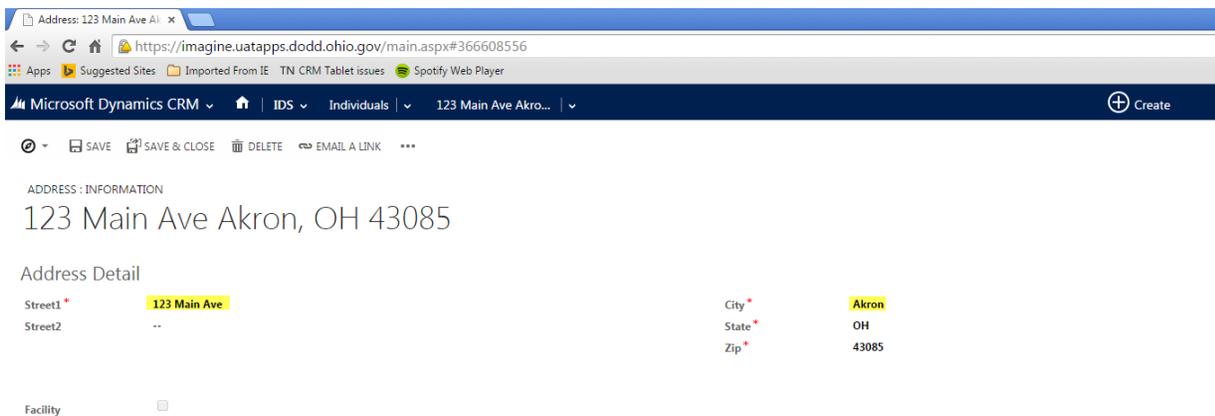




Before edit:



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 [] 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"/>

Age 82 +, but Pre-school selected



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

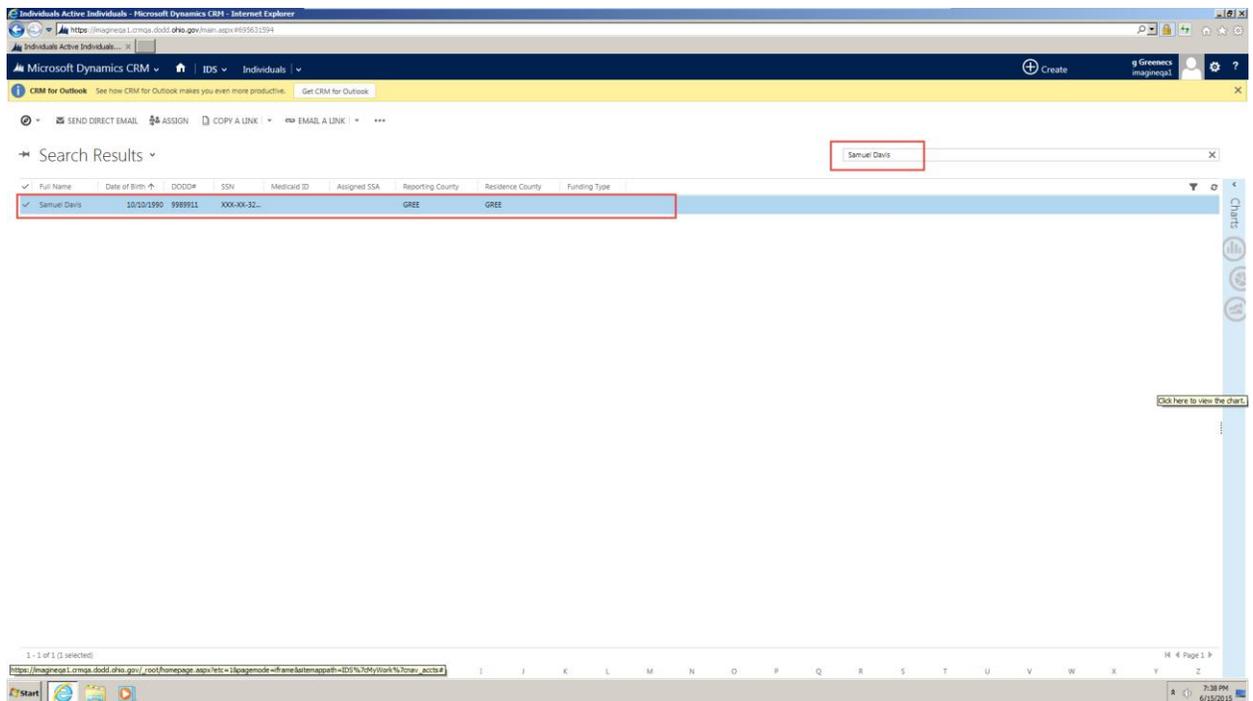
Item	Checked
1. Early Intervention	<input type="checkbox"/>
2. Preschool	<input type="checkbox"/>
3. School	<input type="checkbox"/>
4. Supported Education	<input type="checkbox"/>
5. Childrens Enrichment	<input type="checkbox"/>
6. Adult Home Services	<input type="checkbox"/>
7. Ohio Department of Aging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

Below the 'Services and Supports' section, there is an 'Others' section with 'Competitive Employment' and a checkbox. A 'Funding Quick Summary' section is also visible, containing fields for 'DODD#' (Active), 'Medicaid ID', 'Reporting County' (CUYA), and 'Active'.



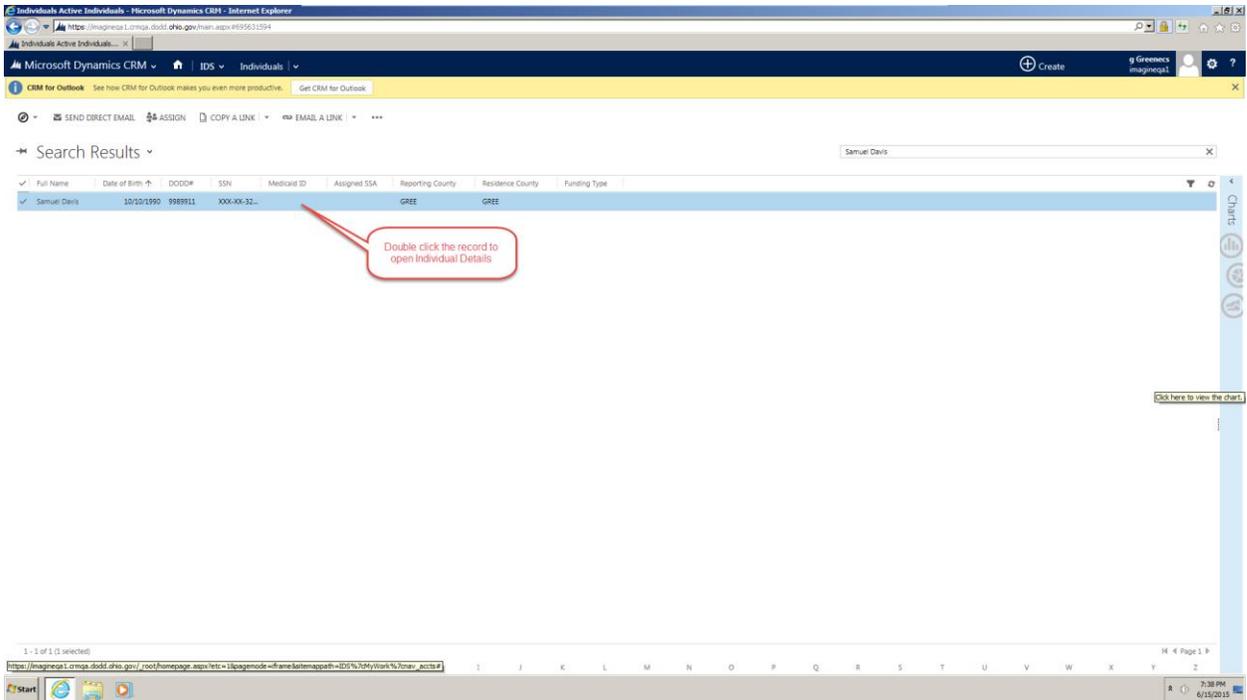
Decision Tree for County Board Eligibility

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

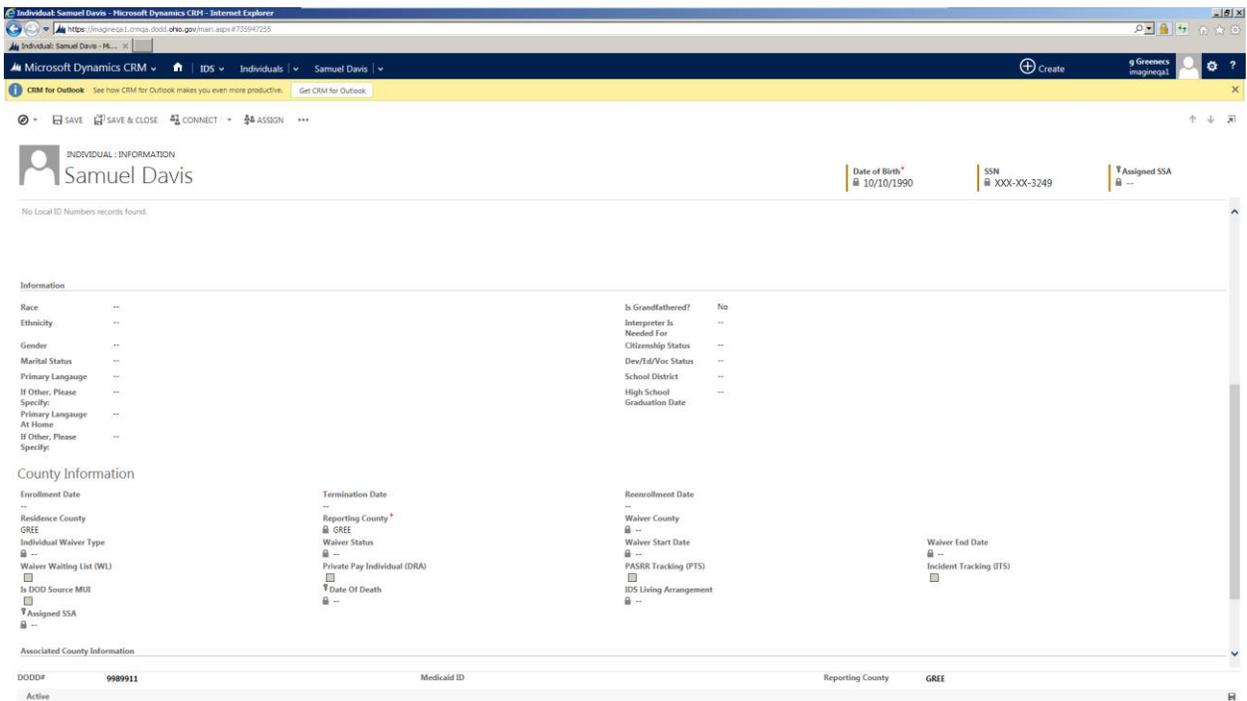


4. Double click on individual record to open individual's record

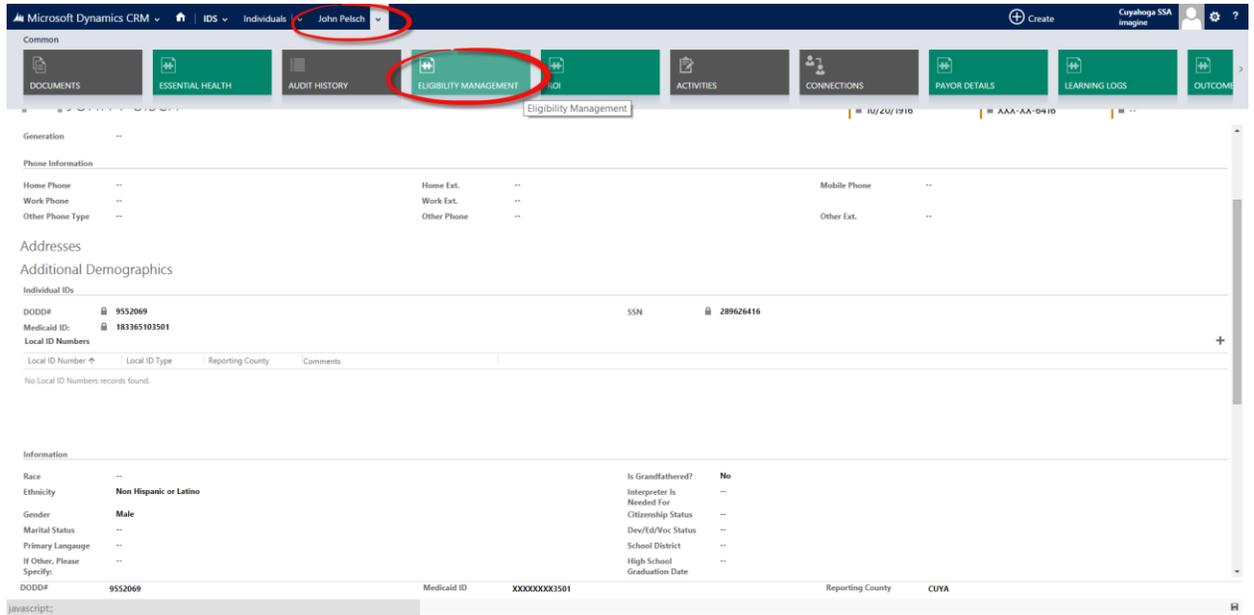




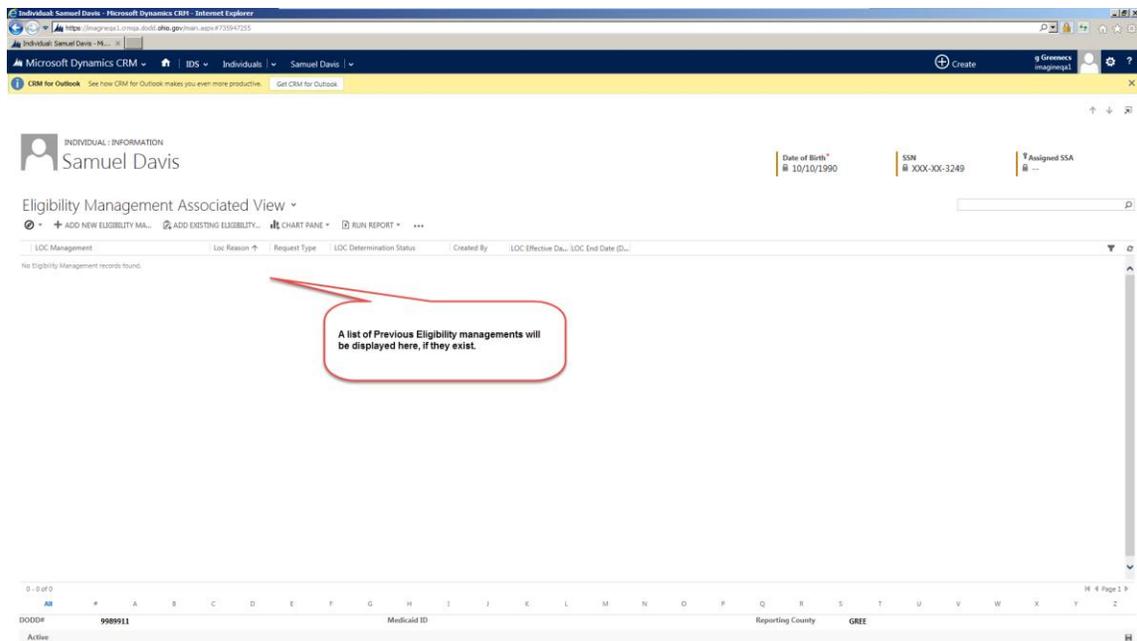
5. User will land on Individual front page.



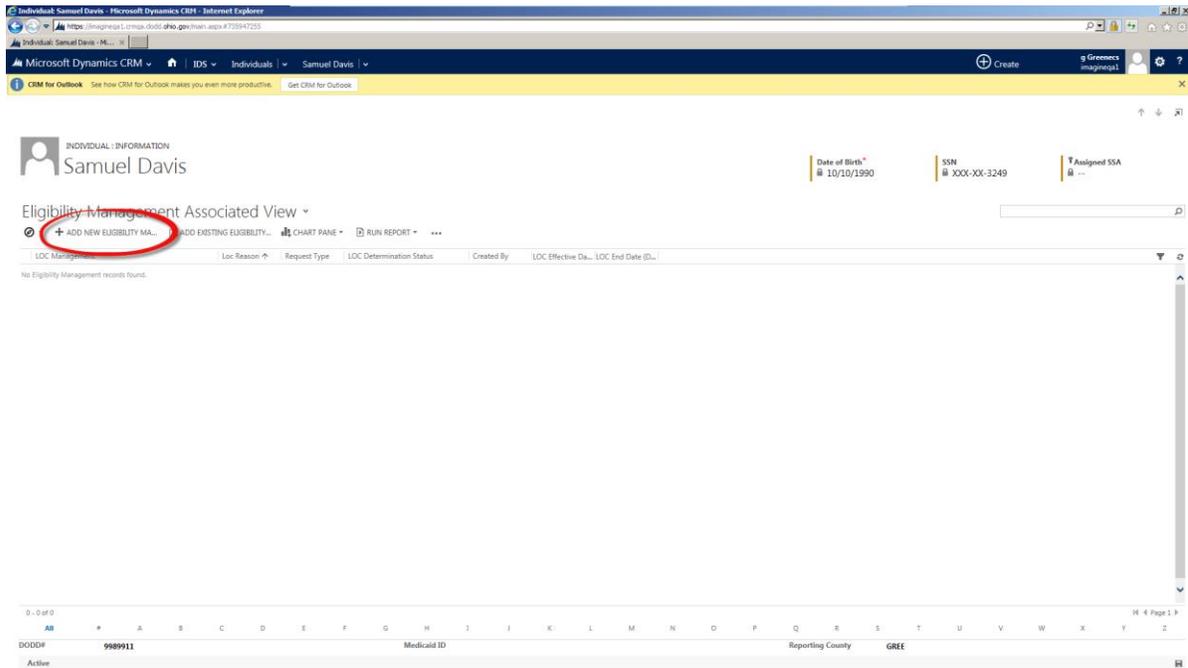
6. Start Eligibility Process - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



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



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'.

Eligibility Info

Assessment Reason*	County Board Eligibility
Request Type*	Initial
Assessment Date (Scheduled/Rescheduled)	6/1/2015
LOC Status	Not Started
Location for Initial Visit	--
Location Address	--
Date of Visit*	6/1/2015
LOC Effective Start Date	--

Assigned Eligibility Specialist*

Eligibility Specialist

Look Up More Records

1 result

INDIVIDUAL DETAILS

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

Verification Tracking

LOC

LOC Date Change / Redet

LOC Date Change Requests

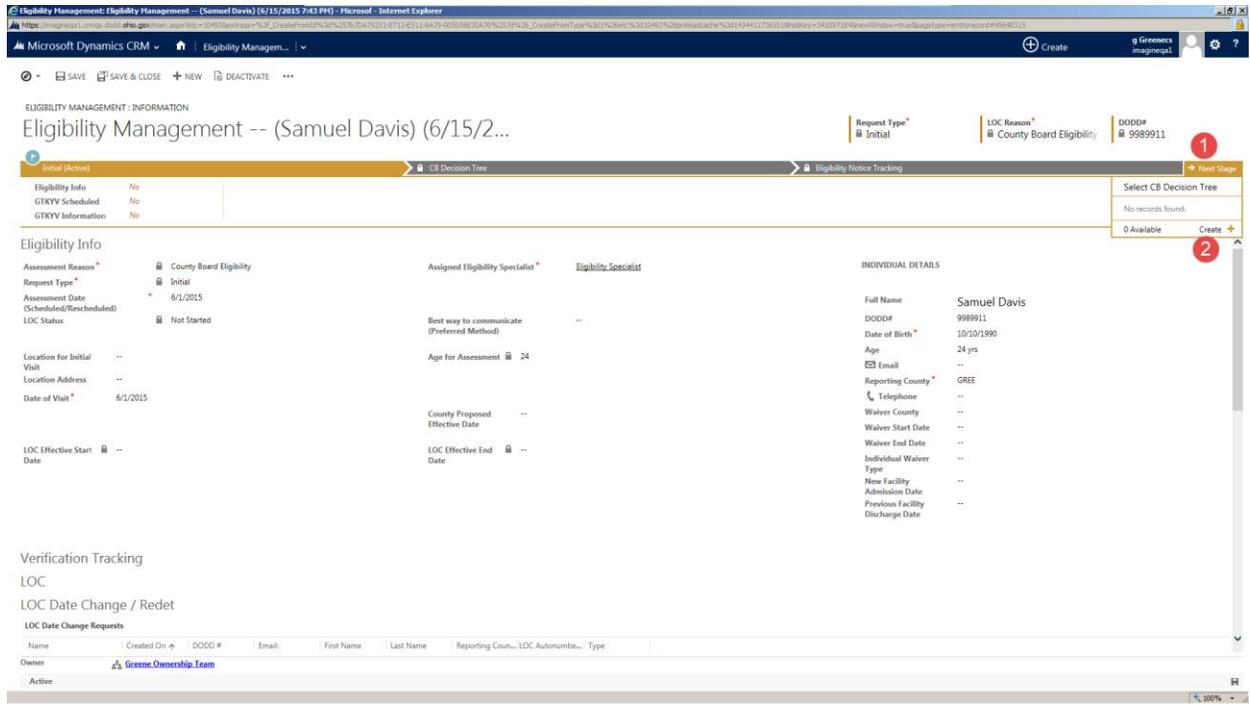
Name	Created On	DODD #	Email	First Name	Last Name	Reporting Count...	LOC Autonom...	Type
To enable this content, create the record.								

Owner: Greene Ownership Team

Active



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 - New CB Decision Tree

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. Greenecms
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

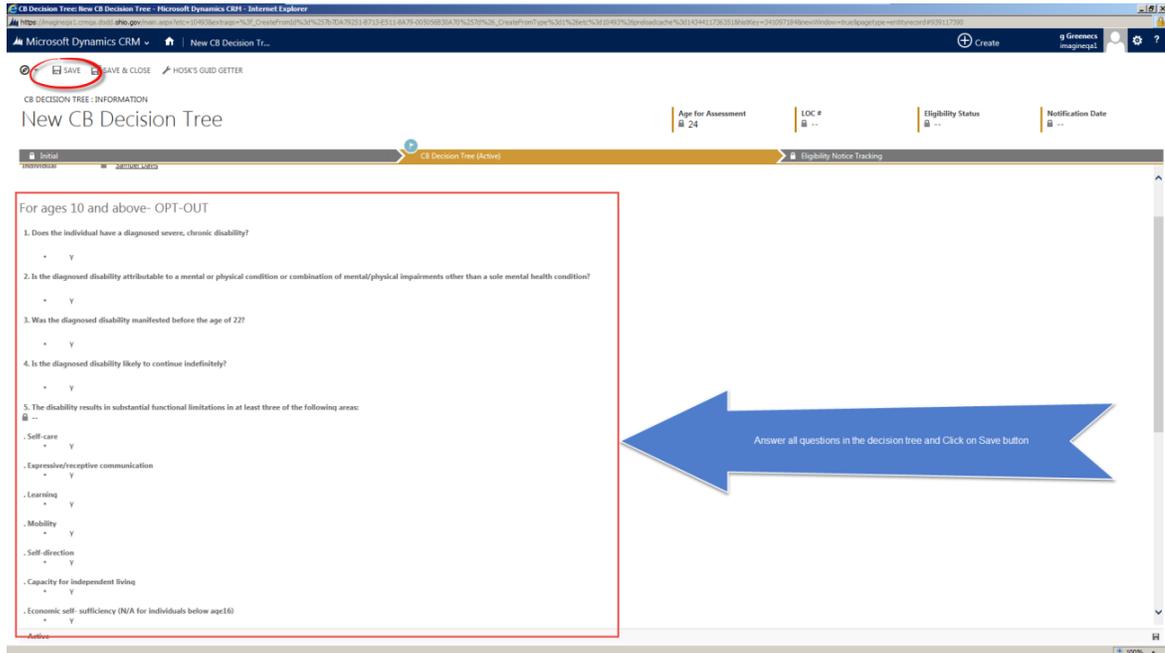
1. Does the individual have a diagnosed severe, chronic disability?
+ --
2. Is the diagnosed disability attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?
+ --
3. Was the diagnosed disability manifested before the age 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

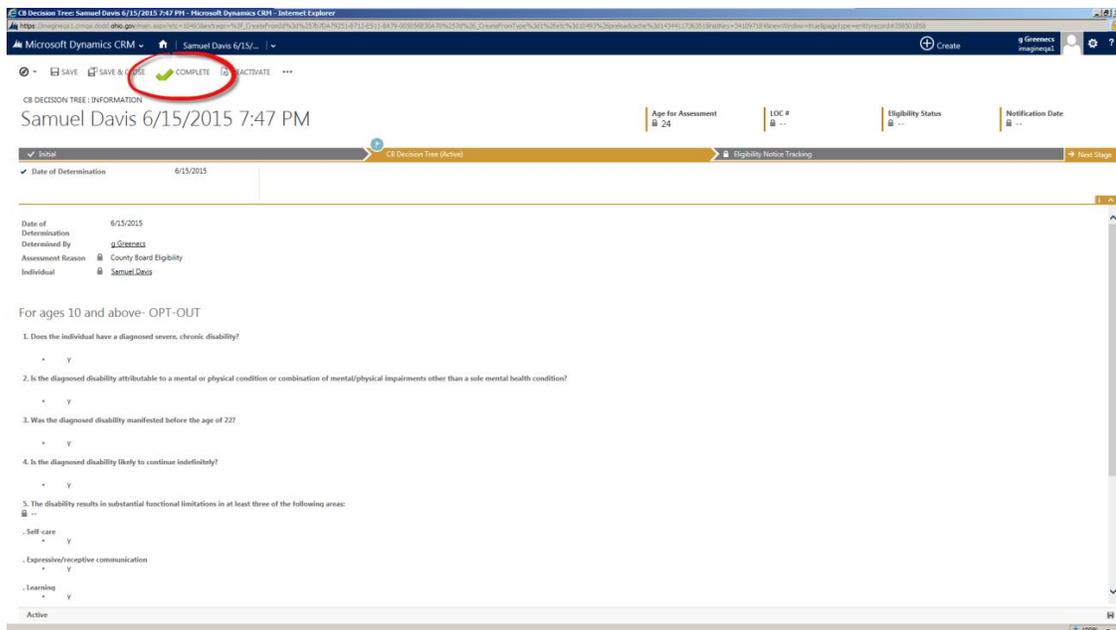


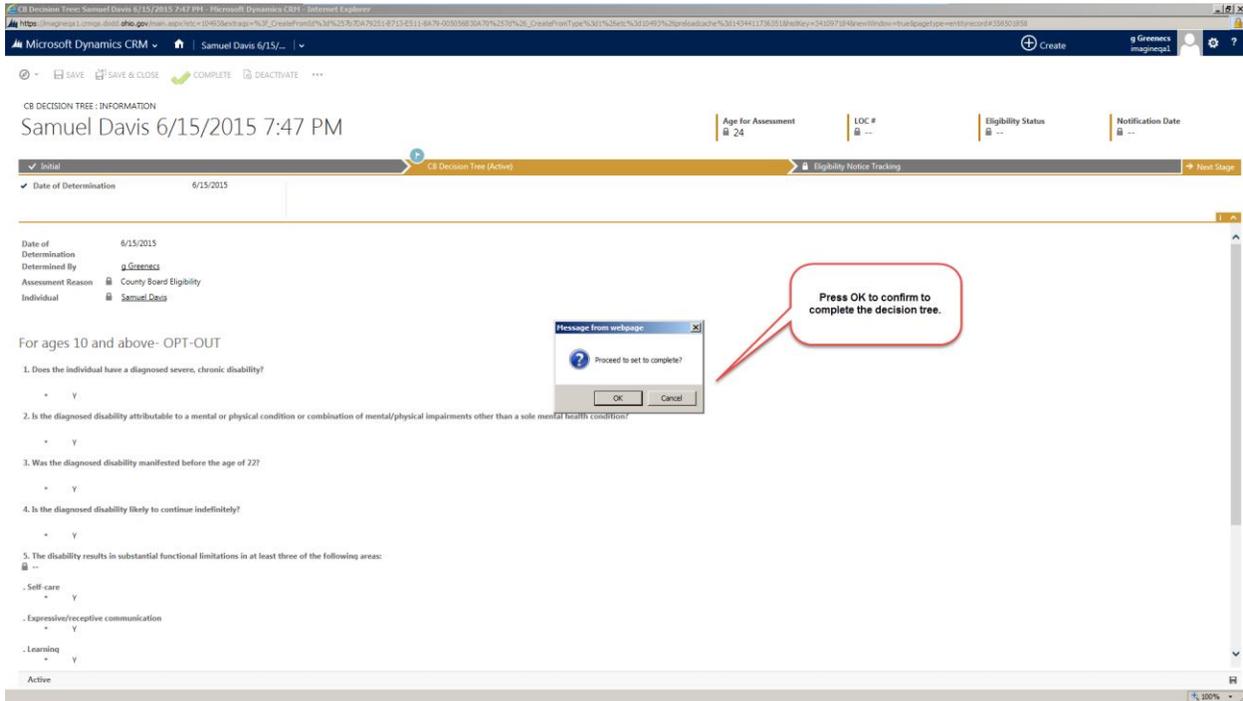
12. Answer all the questions on **Decision Tree**

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

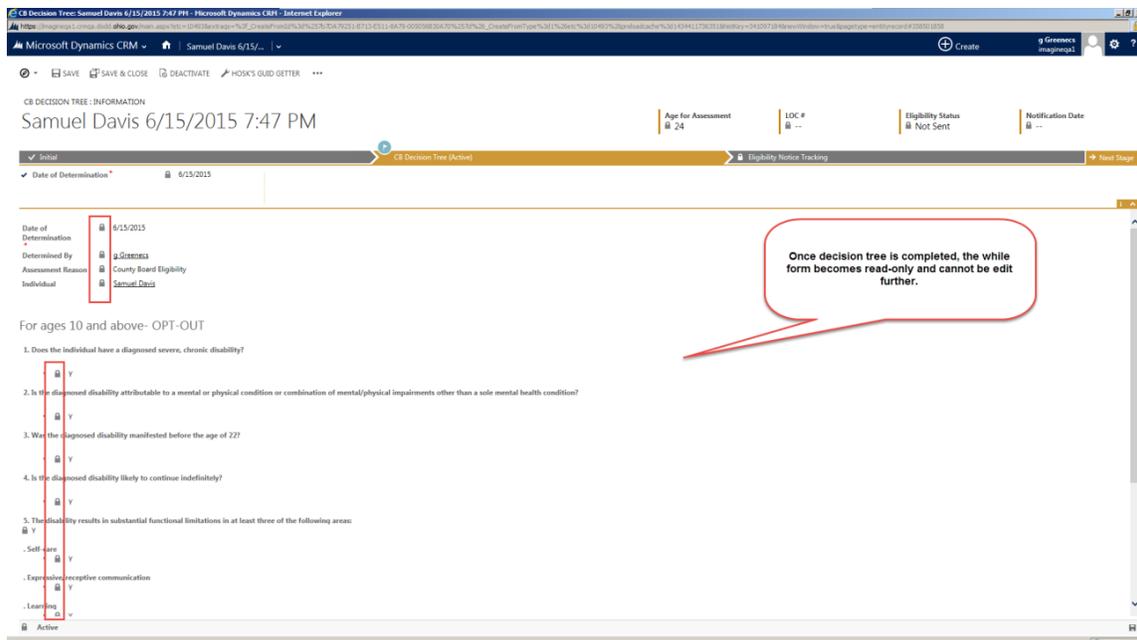


14. Click on the **COMPLETE** button (appears only after Save) from top of this screen





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.



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

The screenshot displays the Microsoft Dynamics CRM interface for a decision tree. The browser title is "CB Decision Tree: Samuel Davis 6/15/2015 7:47 PM - Microsoft Dynamics CRM - Internet Explorer". The page header shows "Microsoft Dynamics CRM" and "Samuel Davis 6/15/...". The main content area is titled "CB DECISION TREE: INFORMATION" and "Samuel Davis 6/15/2015 7:47 PM". A progress bar at the top indicates the current stage is "CB Decision Tree (Active)".

Key information displayed includes:

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

The decision tree steps are:

- Initial
- Date of Determination: 6/15/2015
- CB Decision Tree (Active)
- Eligibility Notice Tracking
- Next Stage

Question 5 is highlighted with a red box:

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

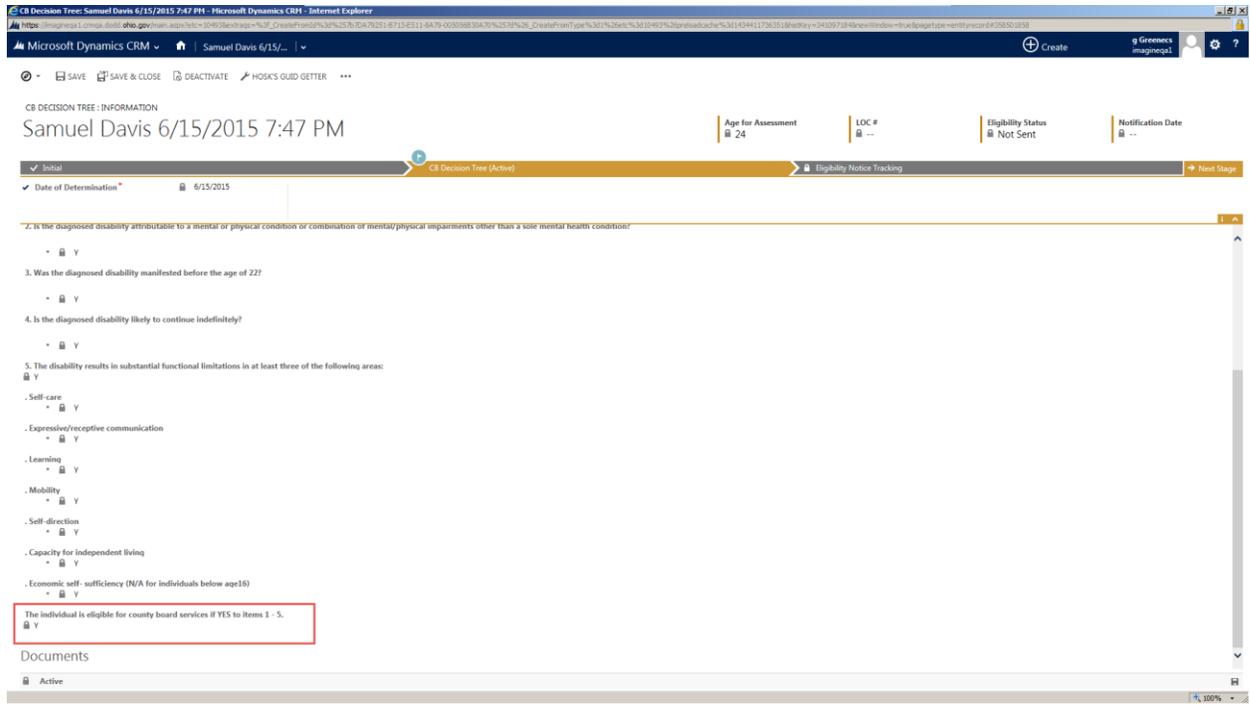
- Self-care: Y
- Expressive/receptive communication: Y
- Learning: Y
- Mobility: Y
- Self-direction: Y
- Capacity for independent living: Y
- Economic self-sufficiency (N/A for individuals below age16): Y

The individual is eligible for county board services if YES to items 1 - 5. Y

Documents: Active



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

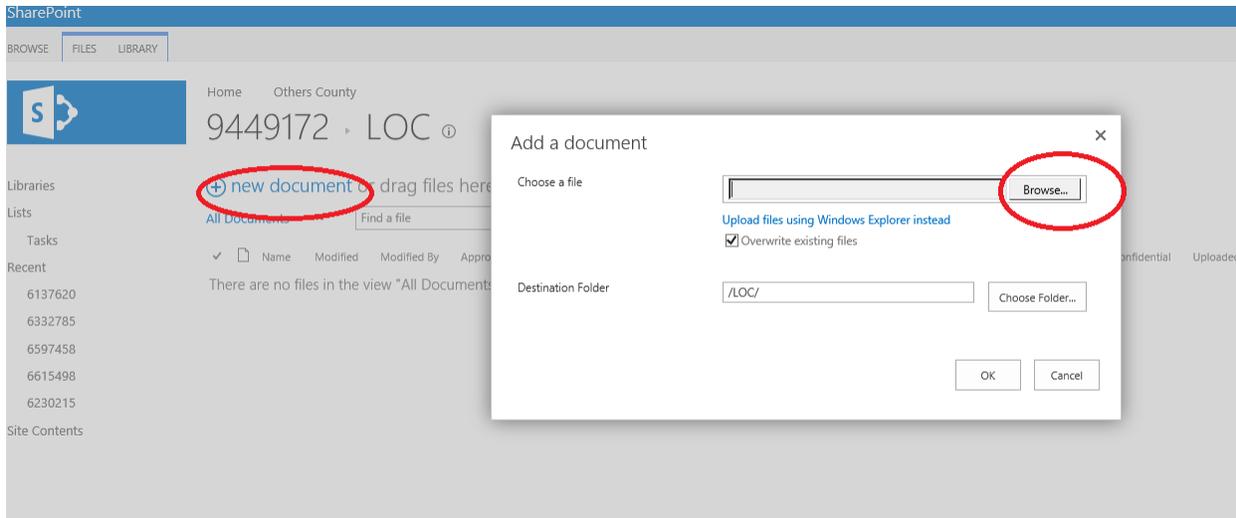


18. You can upload document to SharePoint at any time – before or after Completing the Decision Tree



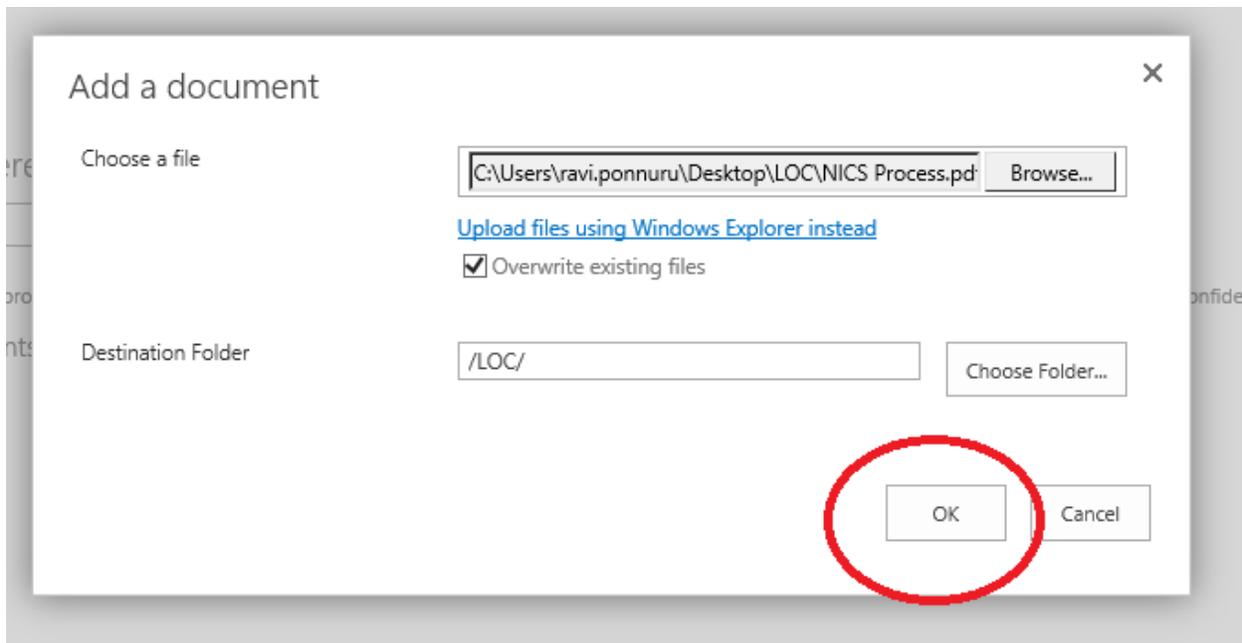
19. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document to SharePoint**

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 *

Category * Choose Section:

LOC Number

LOC Status

Primary Verification

LOC Status

Primary Verification

LOC Number

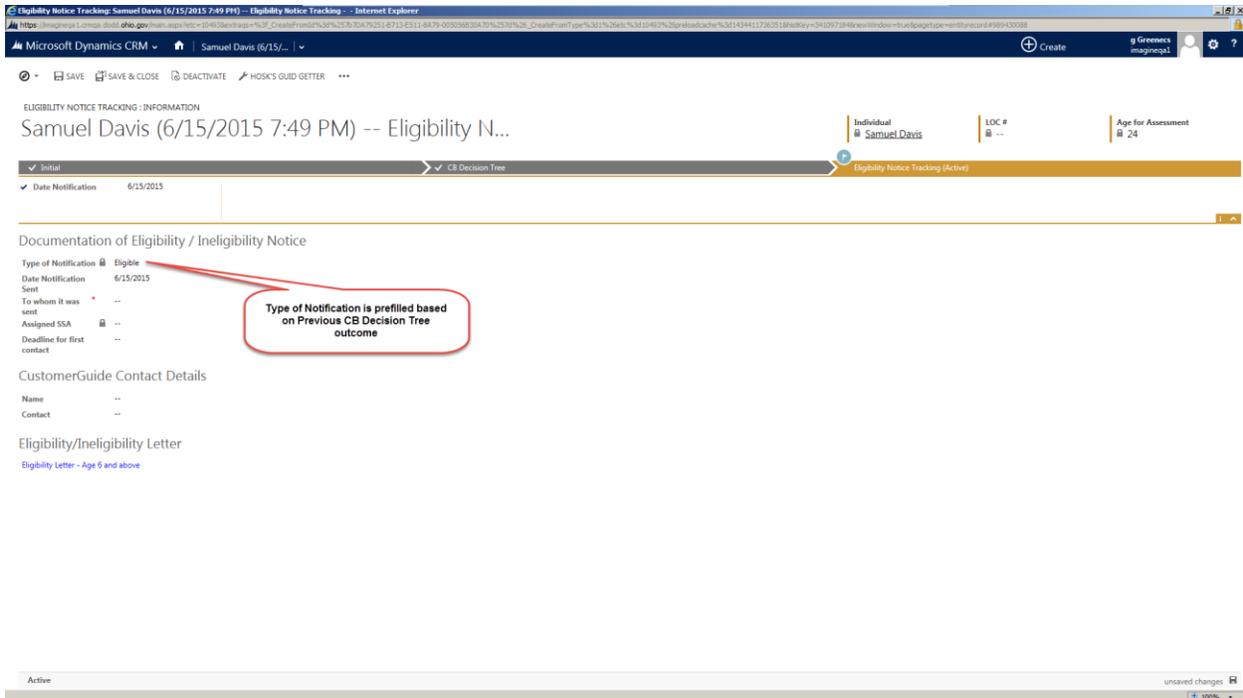


20. Move to **Eligibility Notice Tracking** stage → by clicking
1. on the “**Next Stage**” and
 2. **Select the Eligibility Notice** that is available.

The screenshot shows the Microsoft Dynamics CRM interface for a 'CB Decision Tree' record for Samuel Davis, dated 6/15/2015. The record is currently in the 'Eligibility Notice Tracking' stage. A red circle with the number '1' highlights the 'Next Stage' button in the top right corner. A dropdown menu is open, showing 'Select Eligibility Notice Tracking' with a red circle and the number '2' next to it, and '1 Available' below it. The main content area shows a 'Date of Determination' field set to 6/15/2015. Below this, there is a section for 'Determination' with fields for 'Determined By' (q Greenes), 'Assessment Reason' (County Board Eligibility), and 'Individual' (Samuel Davis). The section is titled 'For ages 10 and above- OPT-OUT' and contains five numbered questions about the individual's disability status, each with a 'Y' radio button selected. The questions are: 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, and Mobility. The 'Active' checkbox is checked at the bottom.

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)





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**

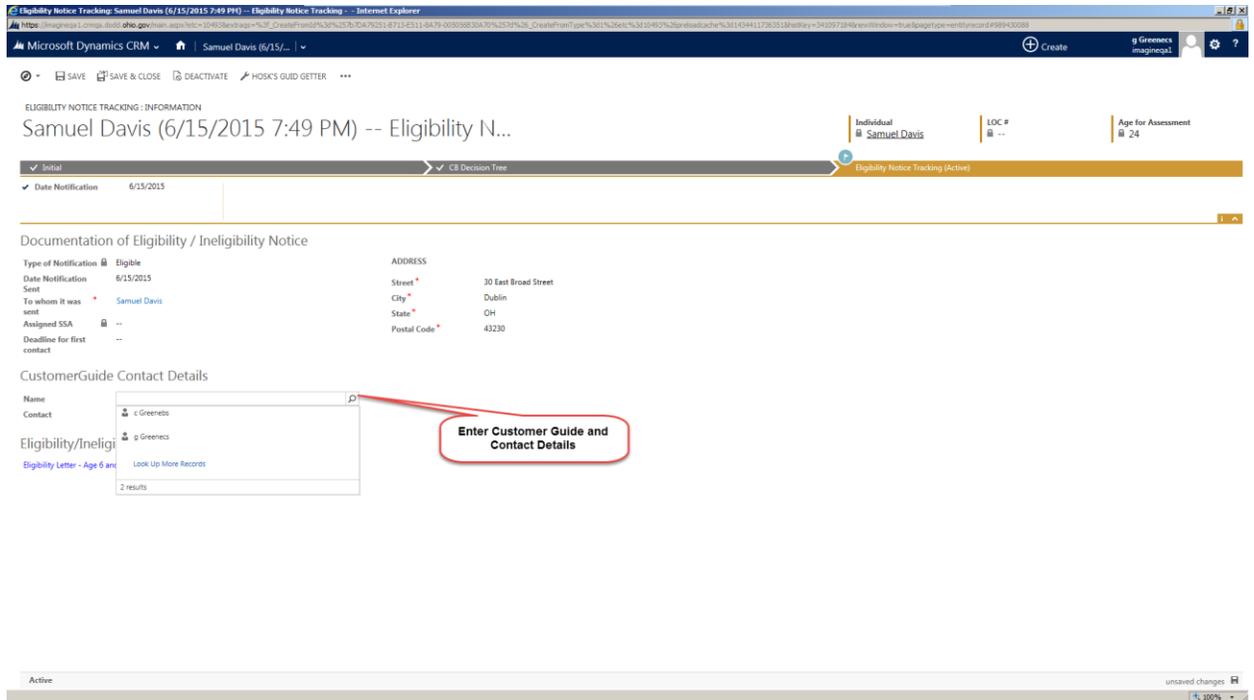
1. By selecting the Individual’s name or individual’s parent or guardian’s name from the option set.



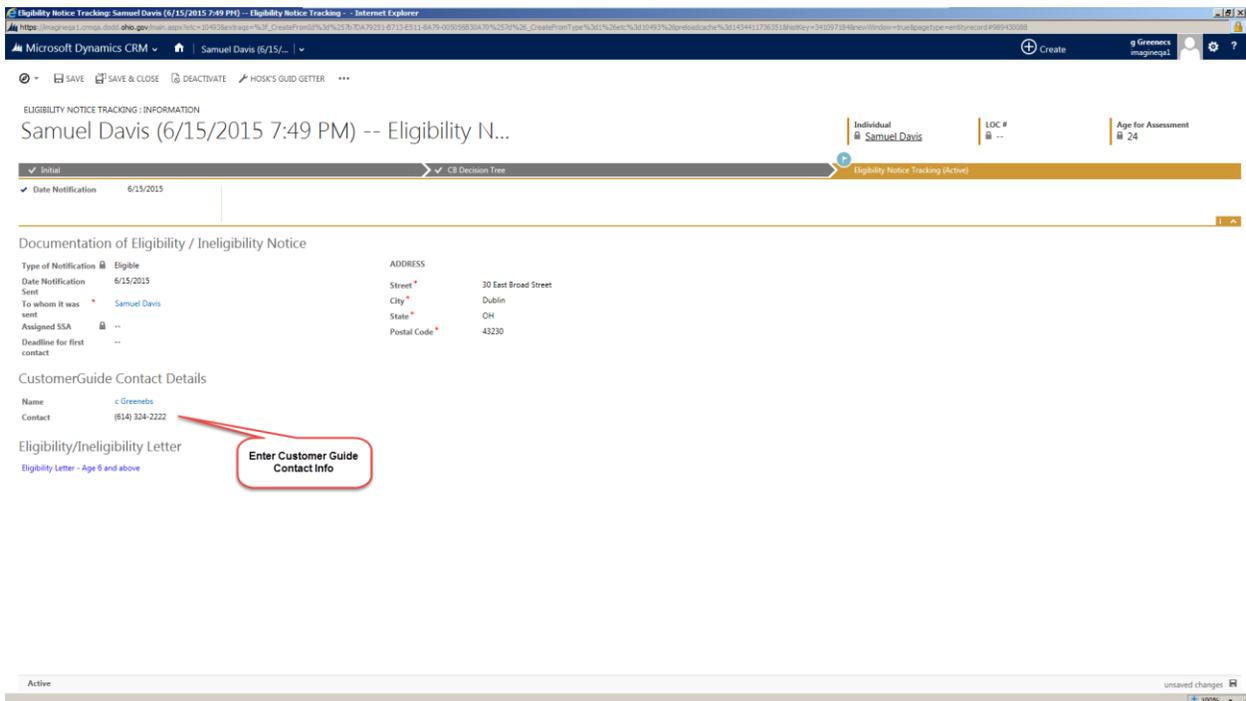
The screenshot displays the Microsoft Dynamics CRM interface for Eligibility Notice Tracking. The top navigation bar shows 'Microsoft Dynamics CRM' and the user 'Samuel Davis (6/15/2015)'. The main content area is titled 'ELIGIBILITY NOTICE TRACKING : INFORMATION' and shows details for 'Samuel Davis (6/15/2015 7:49 PM) -- Eligibility N...'. The interface includes a navigation pane on the left with 'Date Notification' selected. The main area shows 'Documentation of Eligibility / Ineligibility Notice' with a table of notification details. A 'Message from webpage' dialog box is open, prompting for an address. Red circles 1, 2, and 3 highlight the 'To whom it was sent' field, the 'OK' button, and the 'ADDRESS' form respectively.

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.

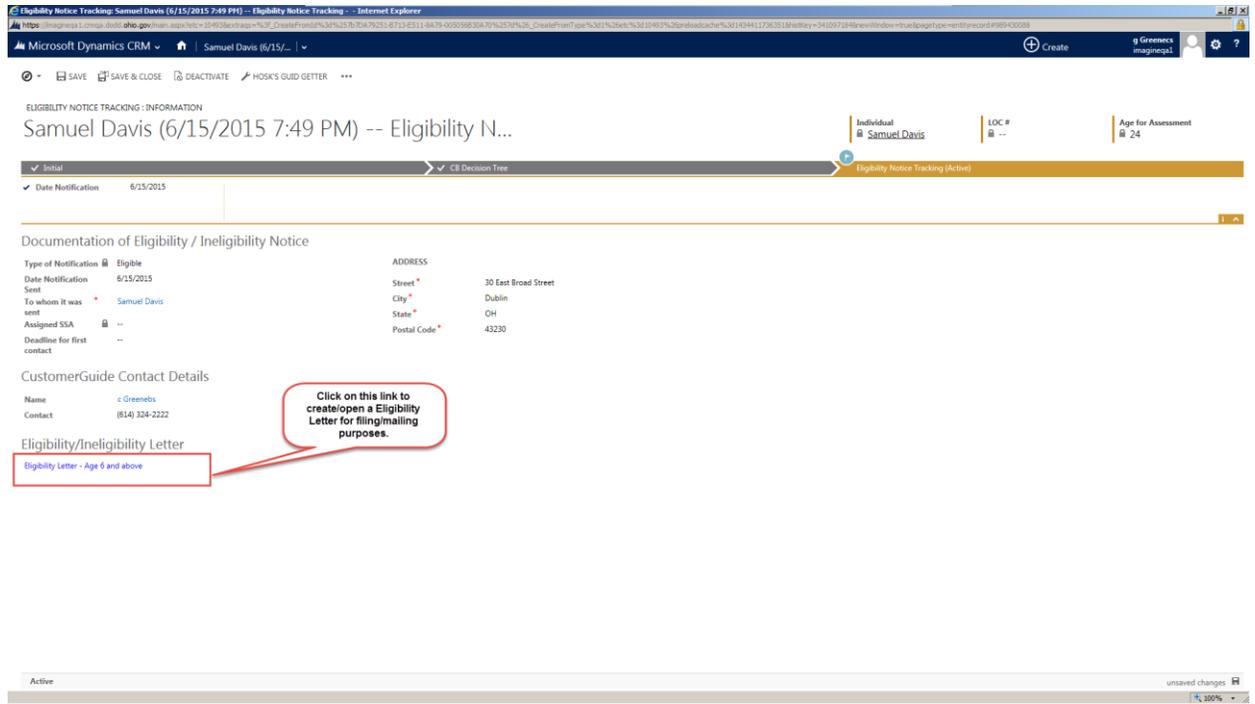




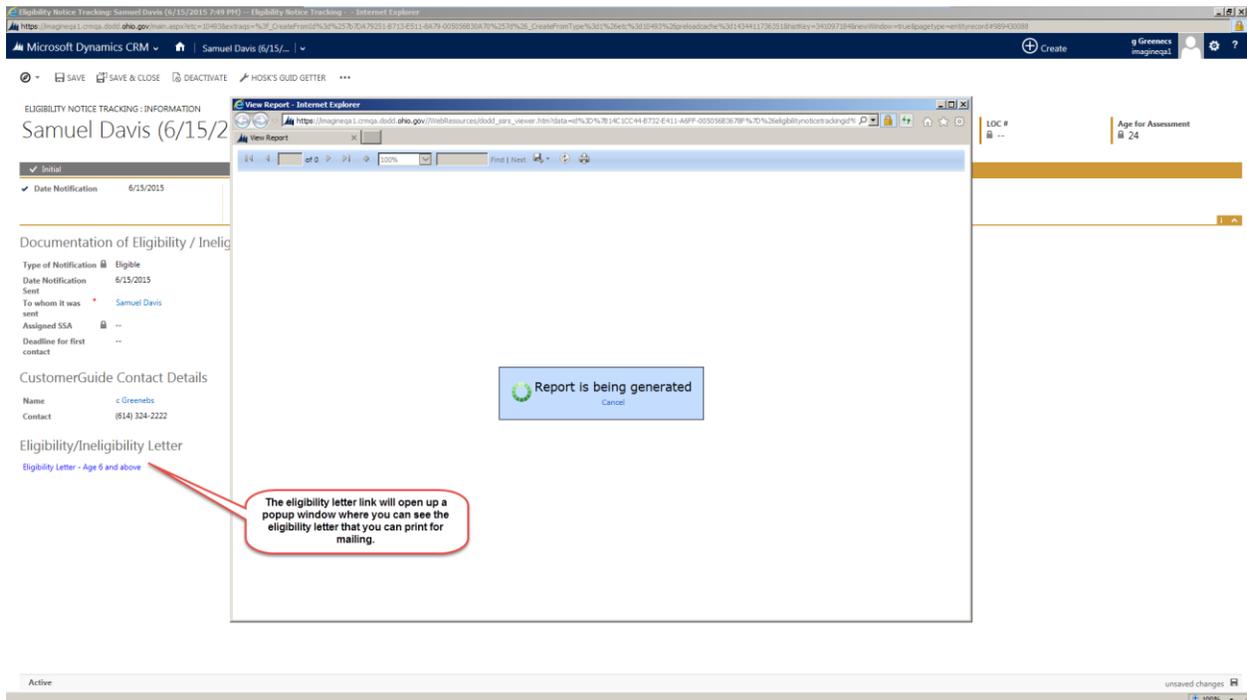
11. Enter Customer Guide's contact information

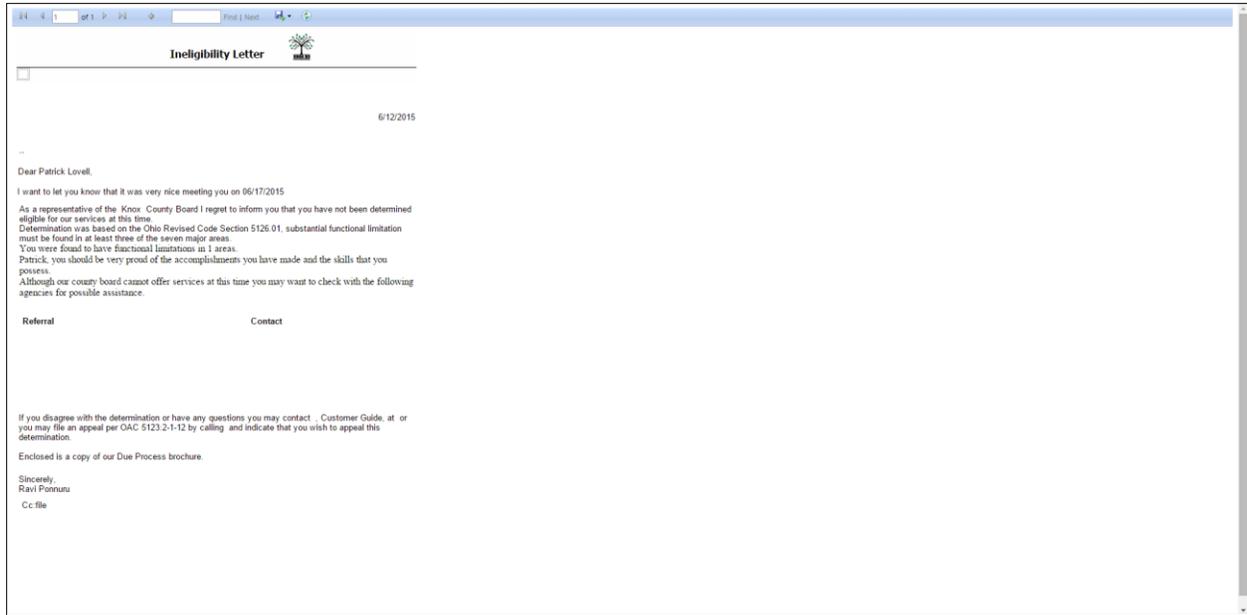


12. Open the **Eligible/Ineligible Notice** by clicking on the link under the Eligibility/Ineligibility Letter Tab

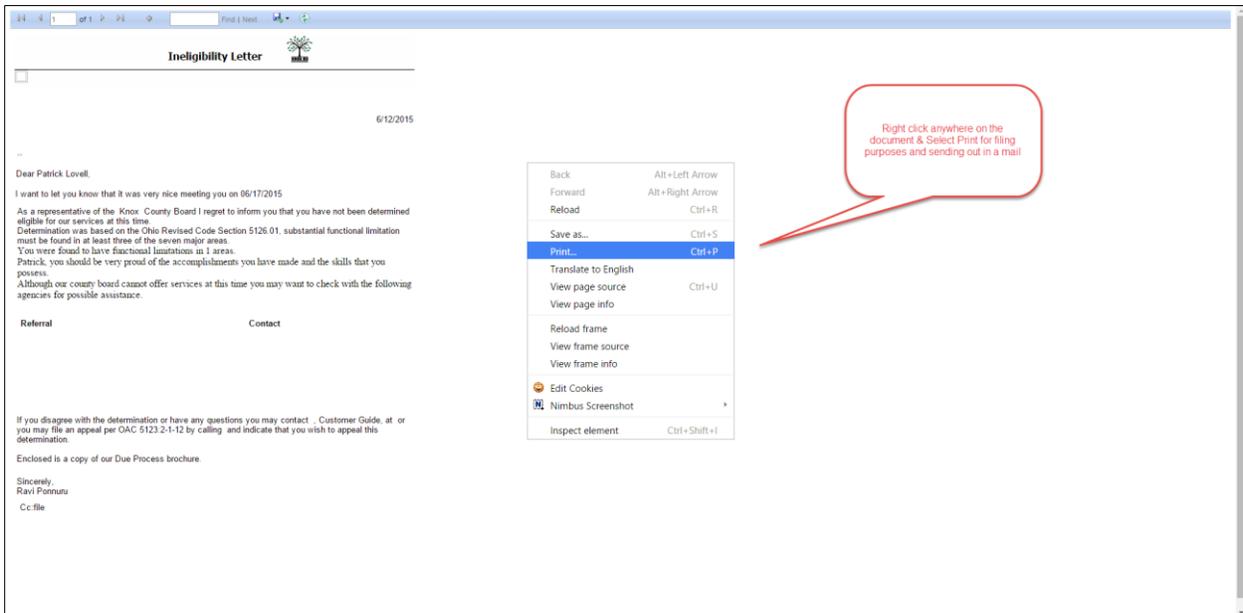


13. **Eligible/Ineligible Notice** will open in a new tab





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)

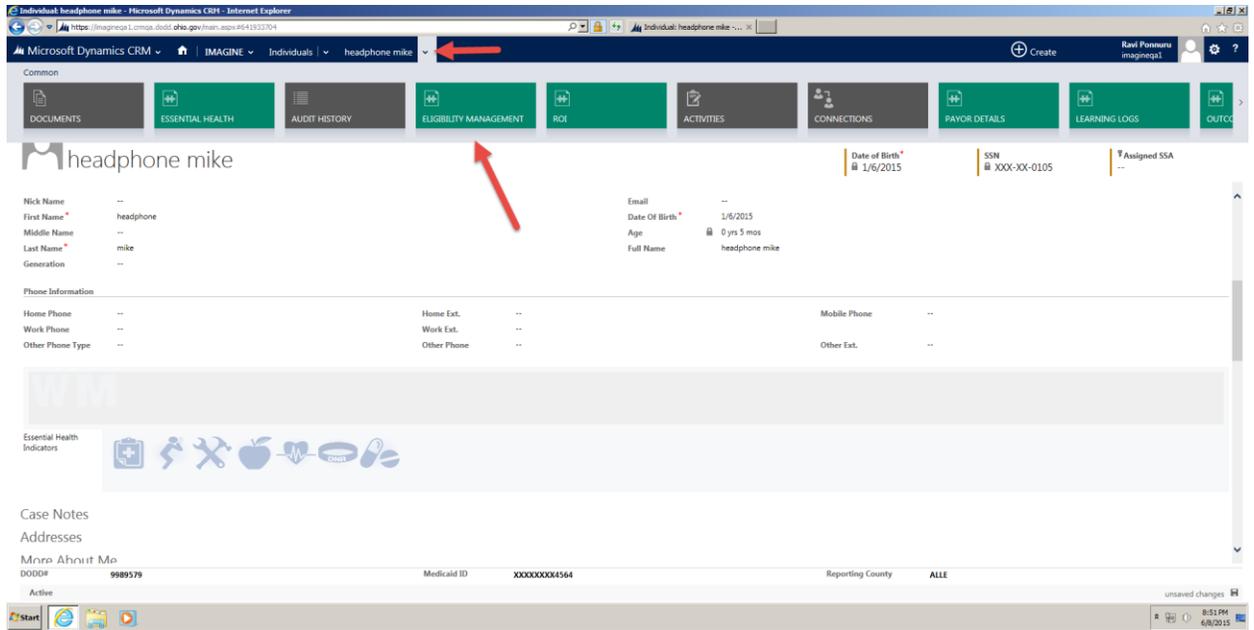
1. To start county board eligibility for an Individual, **Search for individual** by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box
3. **Individual record will show up** if individual exist in your county
4. Double click on individual record to open individual's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

- Header:** Microsoft Dynamics CRM, IMAGINE, Individuals, headphone mike, Create, Raaf Fomere imagine1.
- Navigation:** SAVE, SAVE & CLOSE, CONNECT, ASSIGN.
- 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: --
 - Work Phone: --
 - Other Phone Type: --
 - Home Ext.: --
 - Work Ext.: --
 - Other Phone: --
 - Mobile Phone: --
 - Other Ext.: --
- Essential Health Indicators:** A row of icons representing health indicators.
- Case Notes:** A section for case notes.
- Addresses:**
 - More About Me
 - DODD#: 9989579
 - Medical ID: XXXXXXXX4564
 - Reporting County: ALLE
 - Active

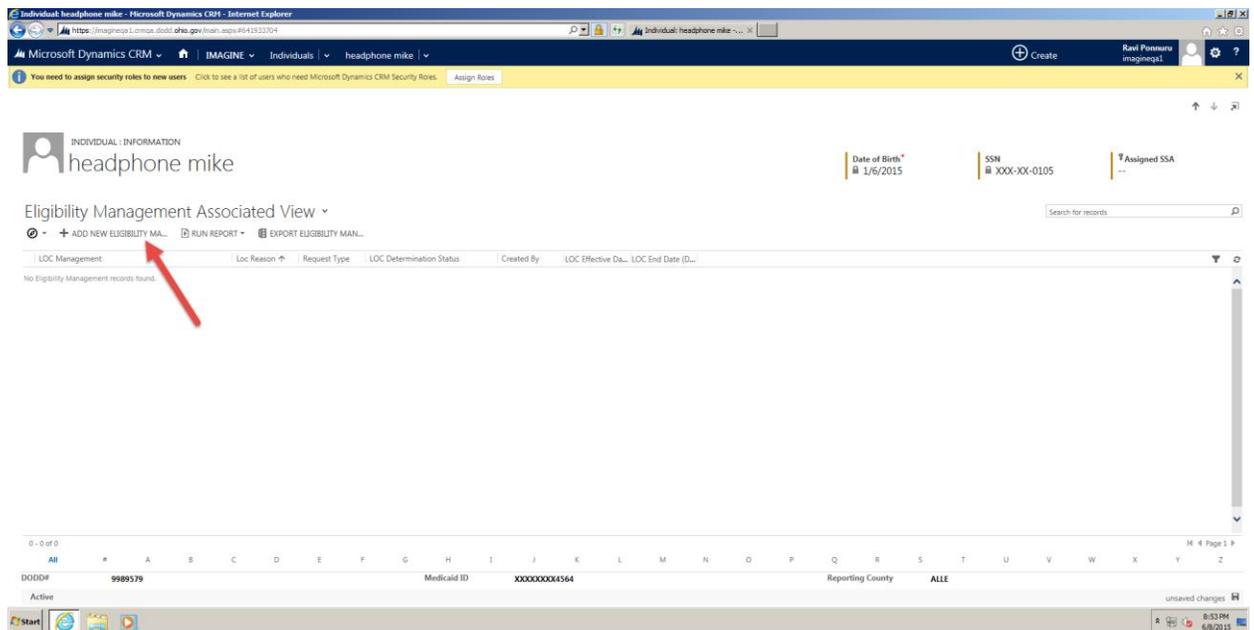
6. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name





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



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

Microsoft Dynamics CRM - Internet Explorer

Microsoft Dynamics CRM - New Eligibility Man...

SAVE & CLOSE HOSK'S GUID GETTER EDIT PROCESS

ELIGIBILITY MANAGEMENT - INFORMATION

New Eligibility Management

Request Type: Initial LOC Reason: County Board Eligibility DODD#: 9989574

Initial (Active) LOC EDDD LOC Determination Packet

Eligibility Info

Assessment Reason: County Board Eligibility

Request Type: Initial

Assessment Date: 6/2/2015

Location for Initial Visit: --

Location Address: --

Date of Visit: 6/11/2015

LOC Effective Start Date: --

Assigned Eligibility Specialist: EligibilitySpec Test

Best way to communicate (Preferred Method): --

Age for Assessment: --

County Proposed Effective Date: --

LOC Effective End Date: --

Individual Details

Full Name: Ada Lovelace

DODD#: 9989574

Date of Birth: 5/13/2009

Age: 6 yrs 0 mos

Reporting County: BELM

Telephone: --

Waiver County: --

Waiver Start Date: --

Waiver End Date: --

Individual Waiver Type: --

New Facility Admission Date: --

Previous Facility Discharge Date: --

Verification Tracking

LOC

Owner: Belmont_Ownership_Team

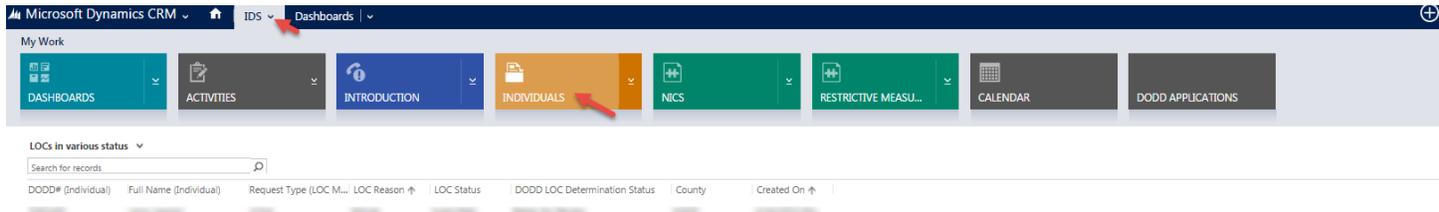
Active

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

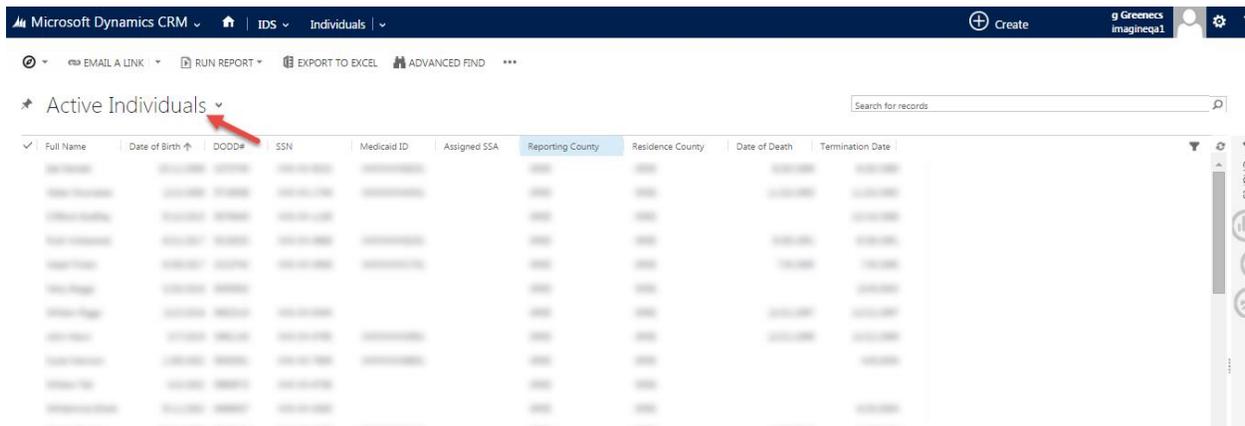


LOC for Waiver Eligibility

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**



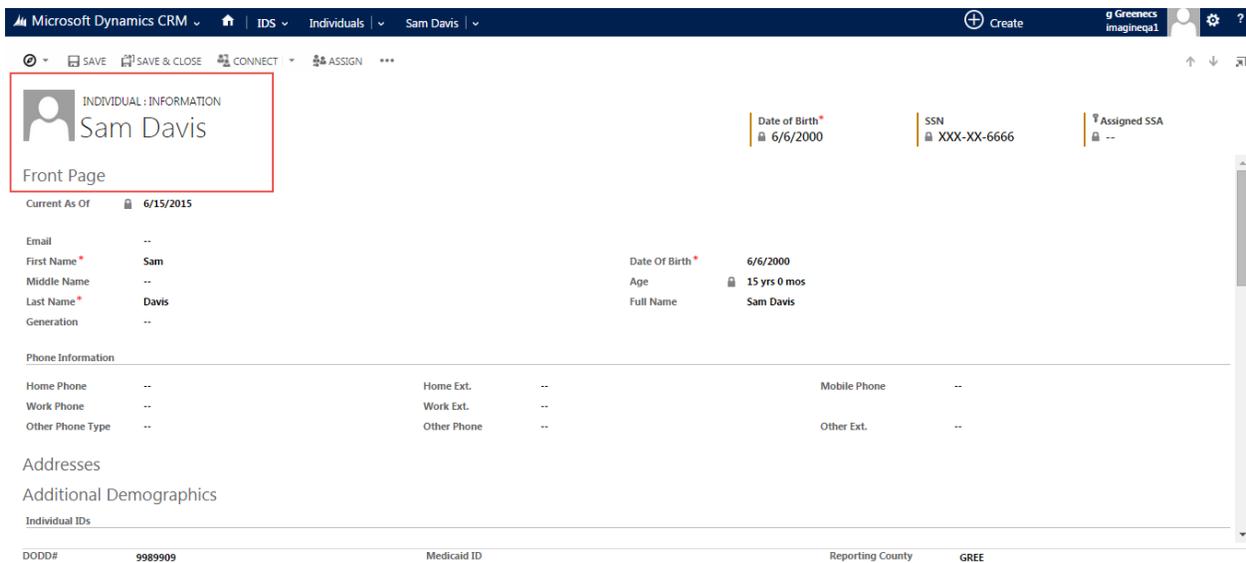
27. **Search for individual** by typing name in search box
 28. Hit **Enter** or click on the magnifying glass next to search box
 29. **Individual record will show up** if individual exist in your county



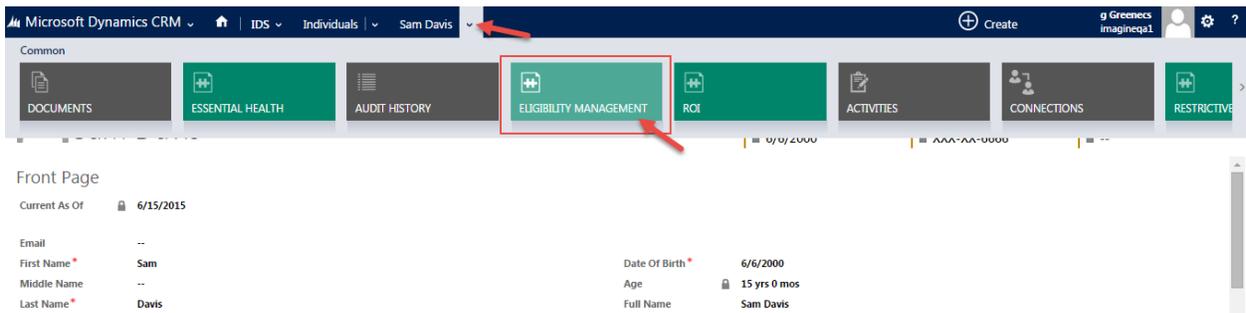


30. Double click on individual record to open individual's record

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

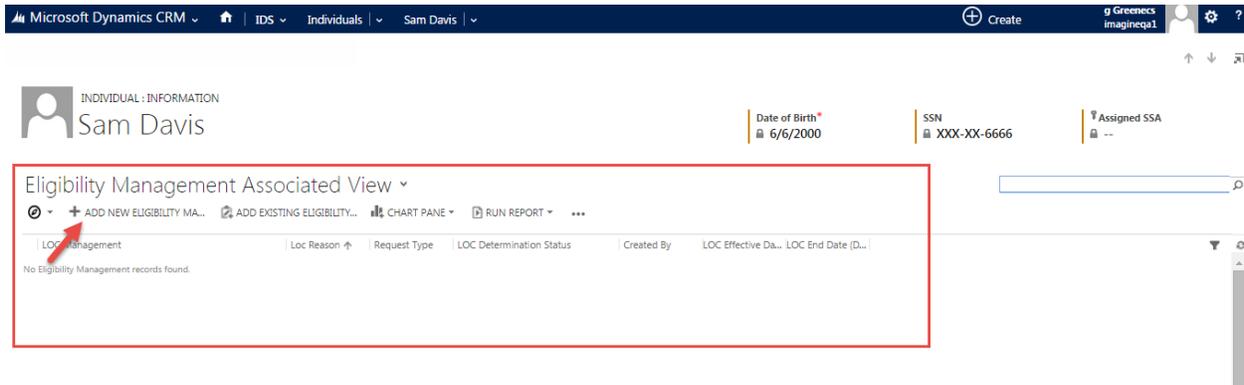


32. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual's name



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	--
Request Type	Initial 2	Waiver Type	IO 5
Assigned Evaluator	g Greenecs 3	Best way to communicate(Preferred Method)	--
Assessment Date (Scheduled/Rescheduled)	6/10/2015 4	Age for Assessment	15
LOC Status	Not Started	Proposed Effective Date	--
Location for Initial Visit	--	LOC Effective Start Date	--
Location Address	<input type="text"/>	LOC Effective End Date	--
Date of Visit	--		

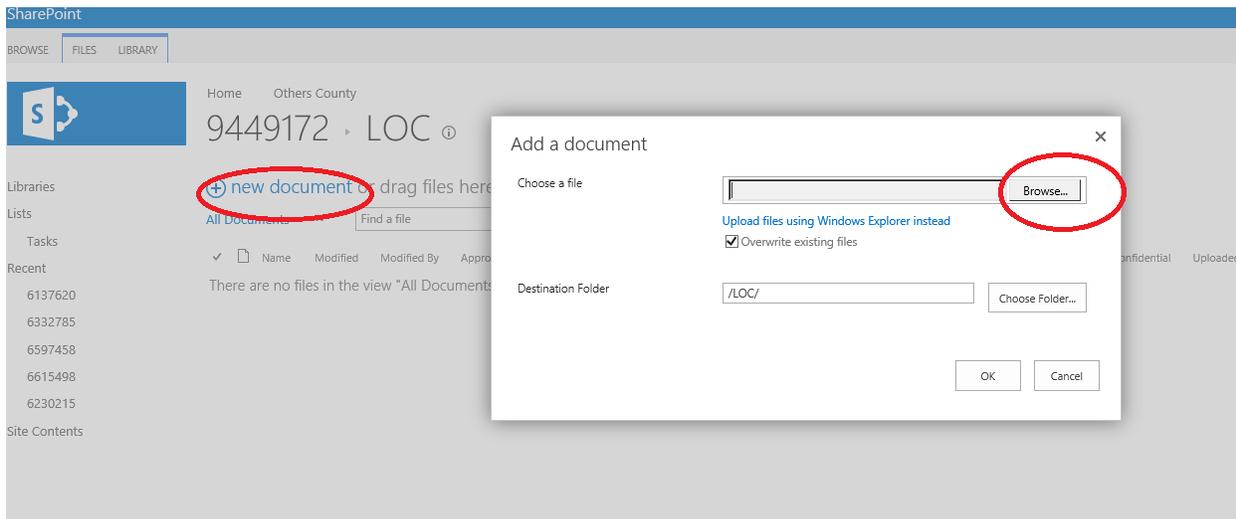
INDIVIDUAL DETAILS

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	--



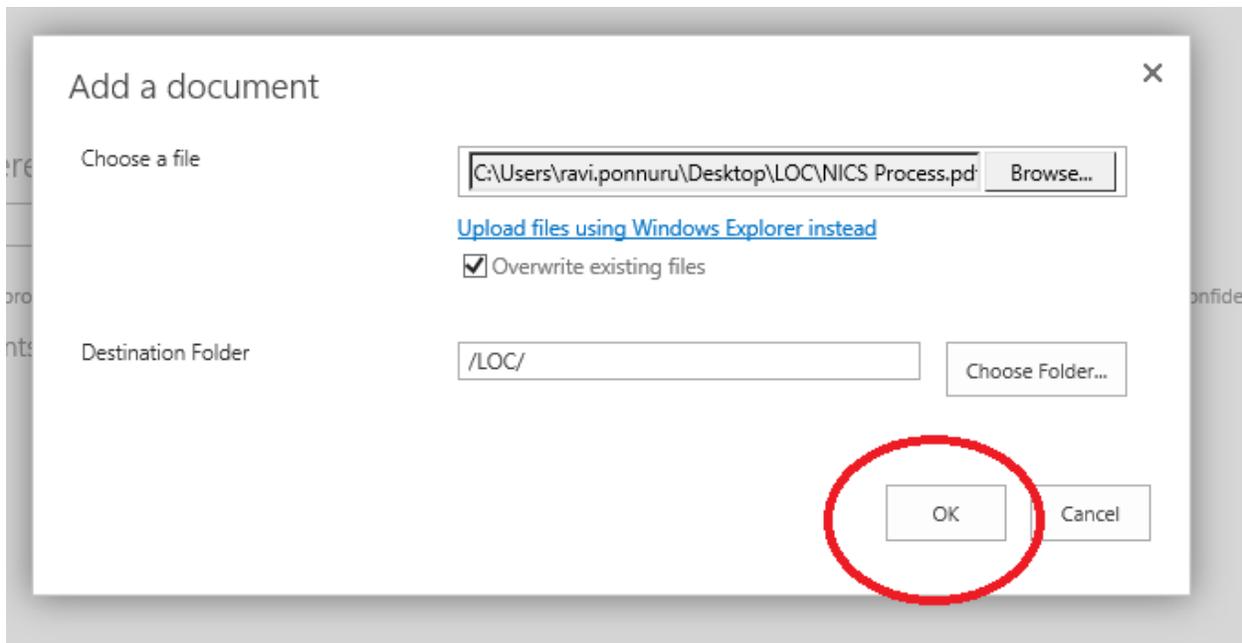
36. Scroll down on Initial Stage – you are looking for the Documents Tab to Upload document to SharePoint

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



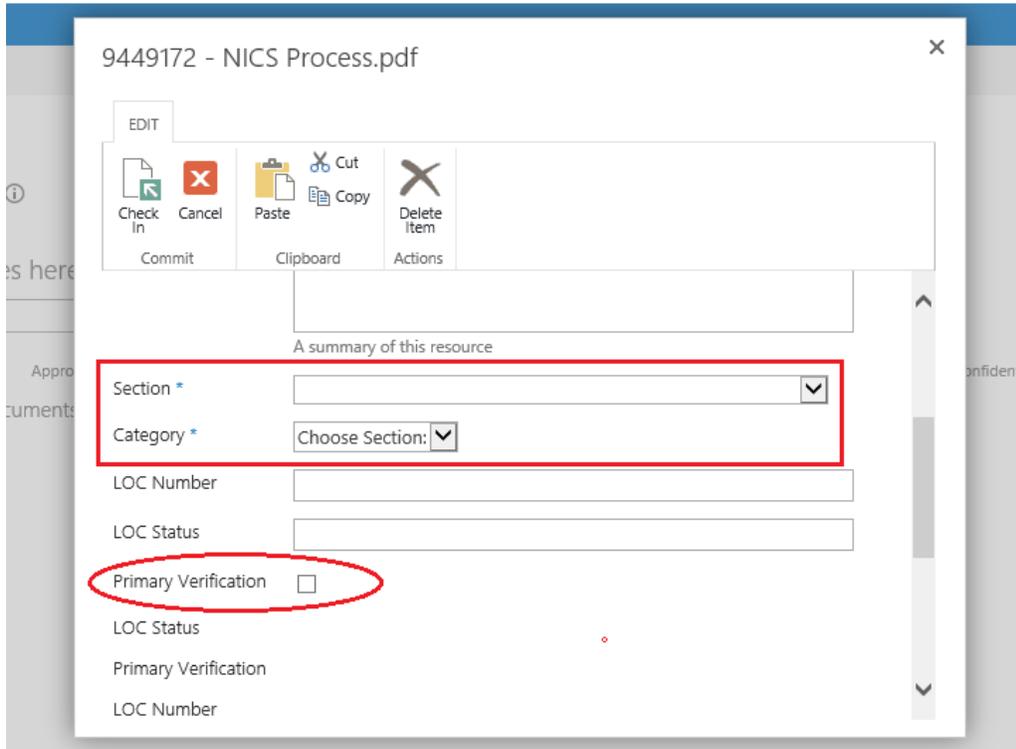
12. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on “Open” once done selecting
13. You will be back on previous screen → **Click on OK**



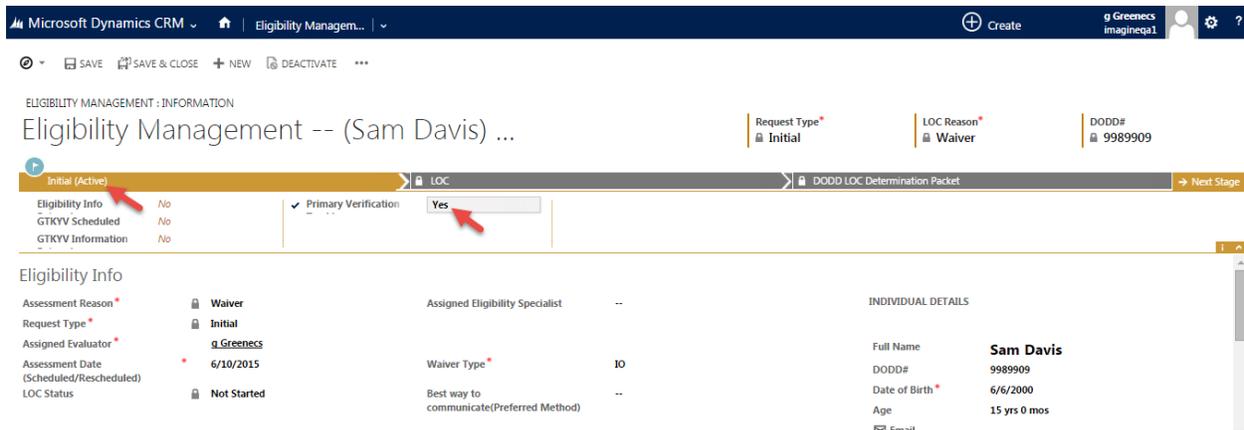


14. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
15. **Add Section →** Select “**LOC**” from the option set
16. **Add Category →** Select the reason for what you are uploading the document → in this case it 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



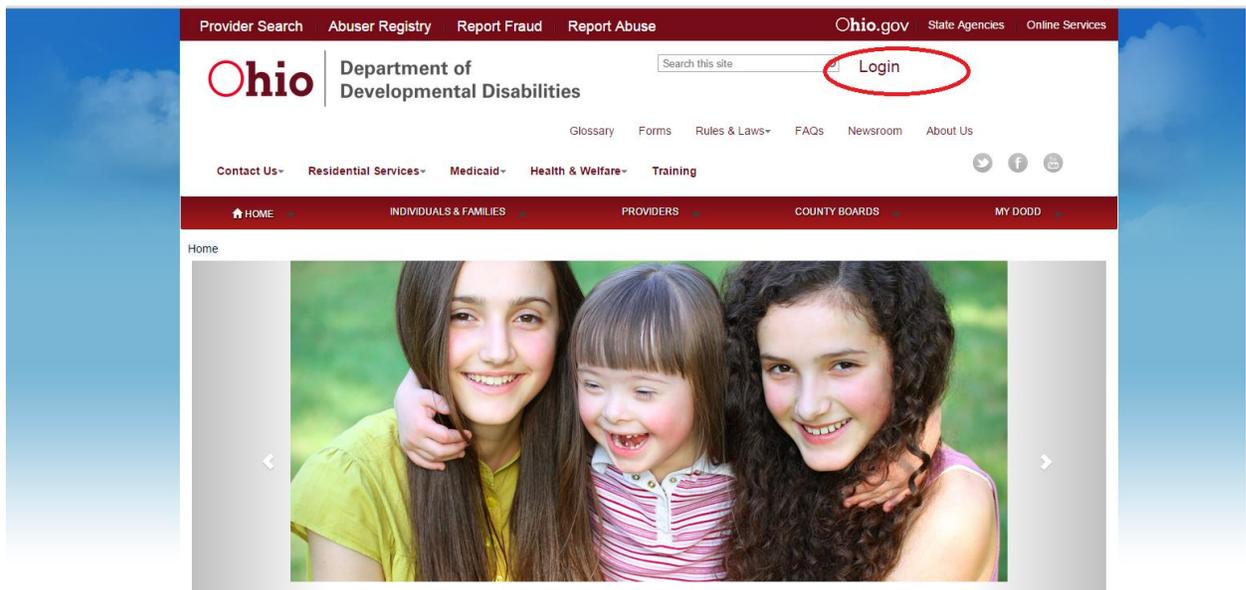
38. Cannot Move to **LOC** stage (has to be an evaluator)



3. Service Support Administrator – SSA (IDS Read)

Login

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

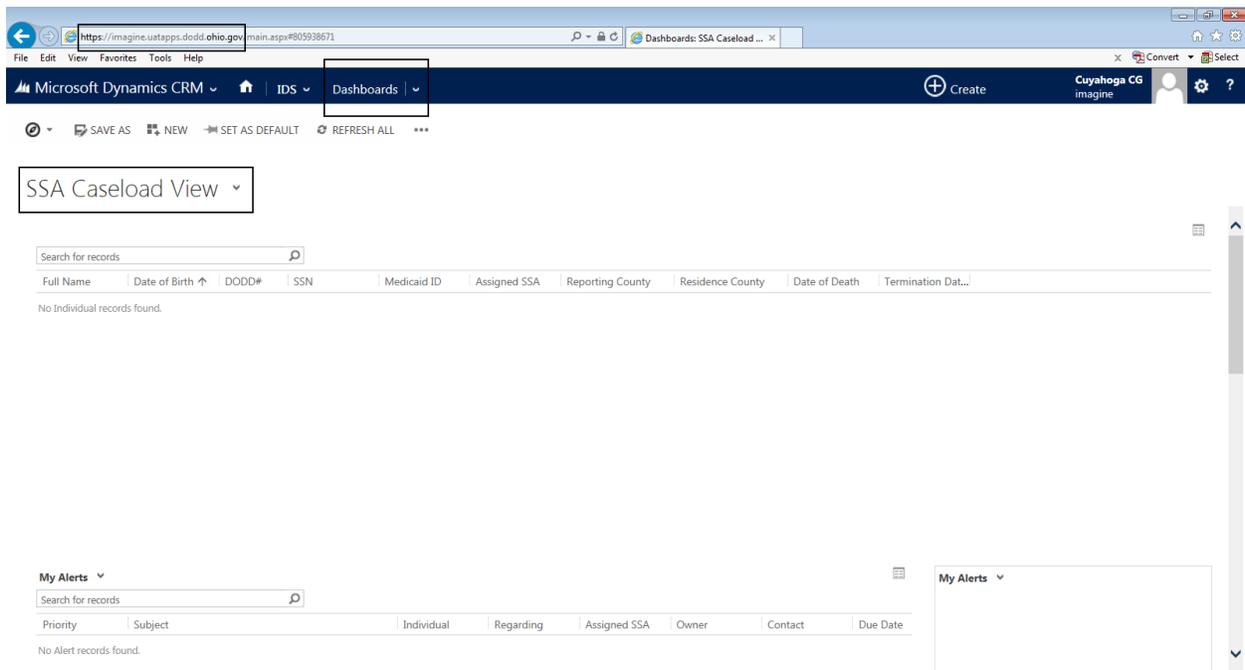


3. Enter your **User Name** and **Password**
(Role: SSA)

A screenshot of the login form for County Boards, Providers, and DODD Central Office. The form is titled 'Login for County Boards, Providers, and DODD Central Office'. It includes a warning message: '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, there is a prompt: 'Type your user name and password.' The form contains two input fields: 'User name' with the value 'cgc' and 'Password' with masked characters. A 'Sign In' button is located below the password field. At the bottom of the form, there are two links: 'Back to Portal' and '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.



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

Microsoft Dynamics CRM | IDS | Dashboards

SAVE AS | NEW | SET AS DEFAULT | REFRESH ALL

County Transfers

- Billing Specialist Dashboard
- Budget Support Specialist Financial Dashboard
- County Transfers
- Customer Service Representative Social Dashboa...
- Download XML File
- Eligibility Specialist Dashboard
- Evaluator Dashboard
- Financial Approval Dashboard
- Group Manager - Review Statistics
- Group Manager Dashboard
- LOC Analysis Dashboard
- Marketing Social Dashboard
- Microsoft Dynamics CRM Social Overview
- My Feedback Notes Dashboard
- OA3 Dashboard
- QA Case Notes Dashboard
- Recently Modified Records
- Reviewer Dashboard
- Sales Activity Social Dashboard
- Sales Dashboard
- Sample Dashboard View
- SSA Caseload View
- SSA Supervisor/Director Caseload View
- Waiver LOC Redet

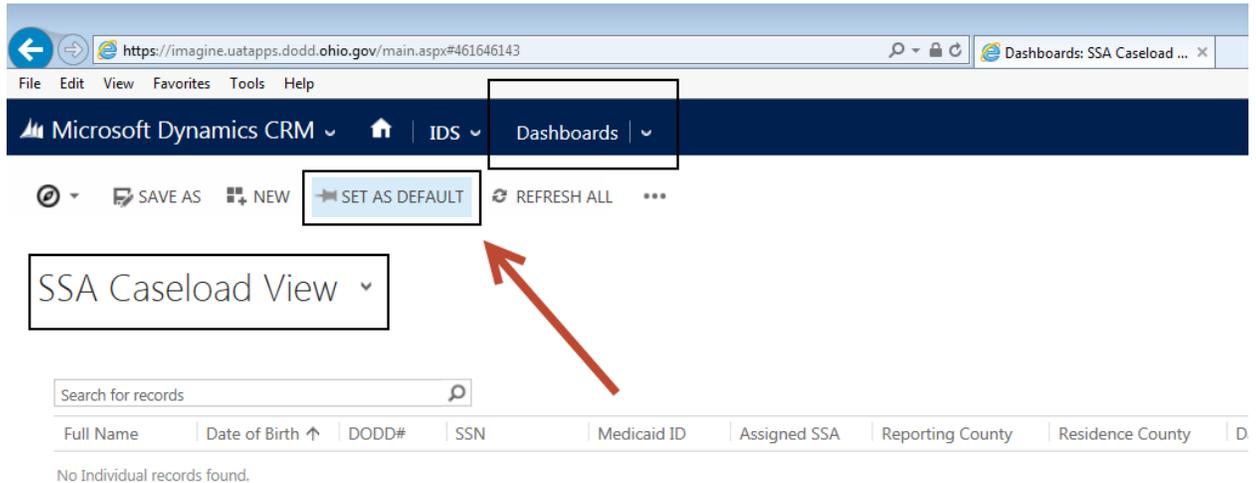
Request Date | Created By | Created On

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

Request Date | Created By | Created On



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

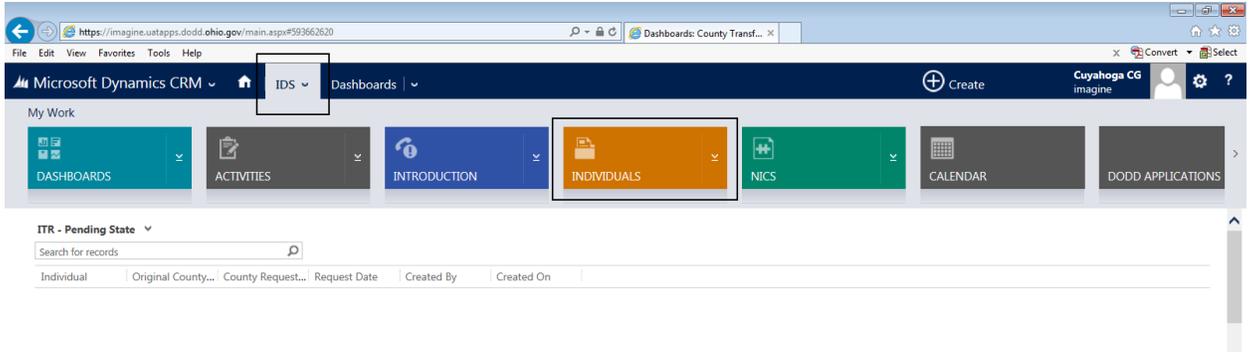


Access Individual

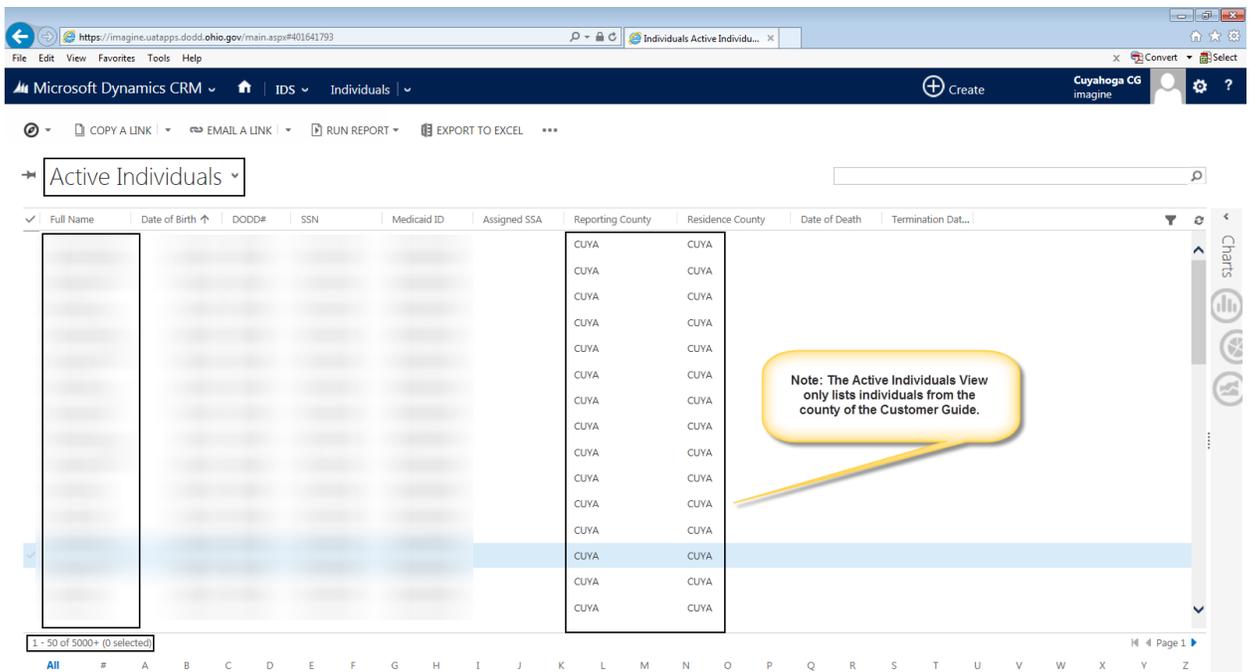
6. To access list of individuals in your county:

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.



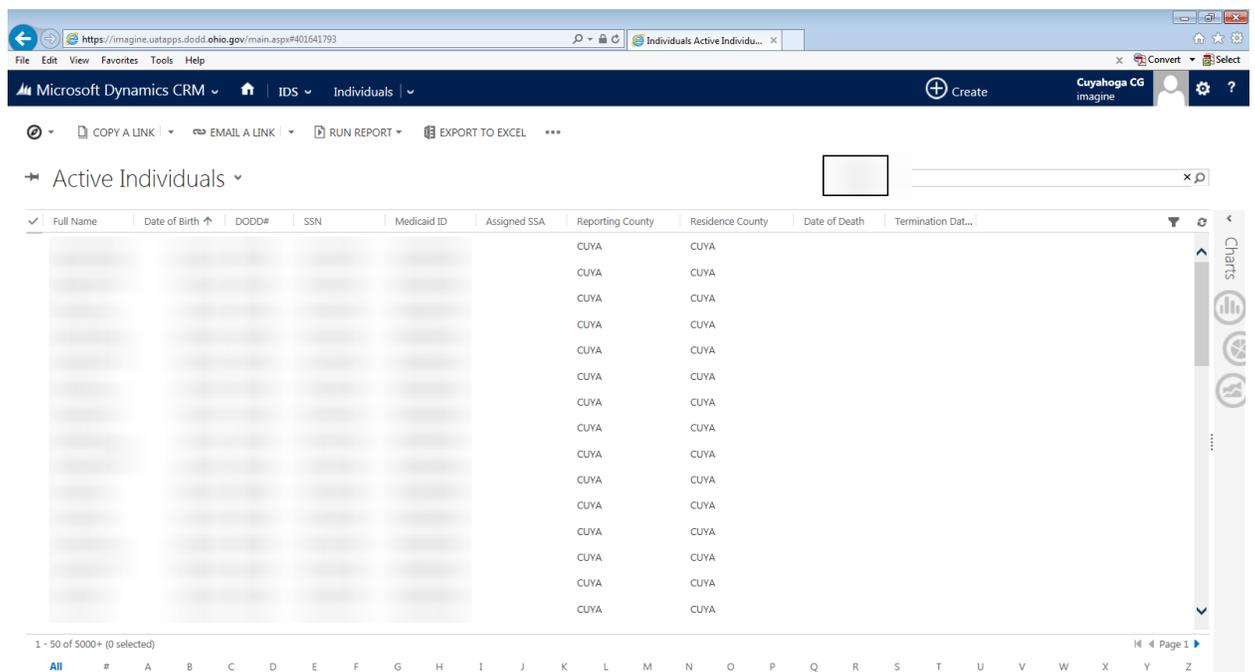
Search Individual

7. Follow these steps to Individual Search

1. 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 an SSA you have the ability to search all individuals in your associated counties.

2. Hit **Enter** or click on the magnifying glass to search
3. Individual record(s) will be displayed if an individual exists in your associated counties.



The screenshot shows a web browser window displaying the Microsoft Dynamics CRM interface. The browser address bar shows the URL: <https://imagine.uetapps.dodd.ohio.gov/main.aspx#401641793>. The CRM navigation bar includes 'Microsoft Dynamics CRM', 'IDS', and 'Individuals'. A 'Create' button and user information for 'Cuyahoga CG imagine' are visible. 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 contains 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 has 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 interface, there is a 'Charts' sidebar with icons for bar, line, and pie charts.

Full Name	Date of Birth	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County	Funding
						CUYA	CUYA	
						ASHT	ASHT	

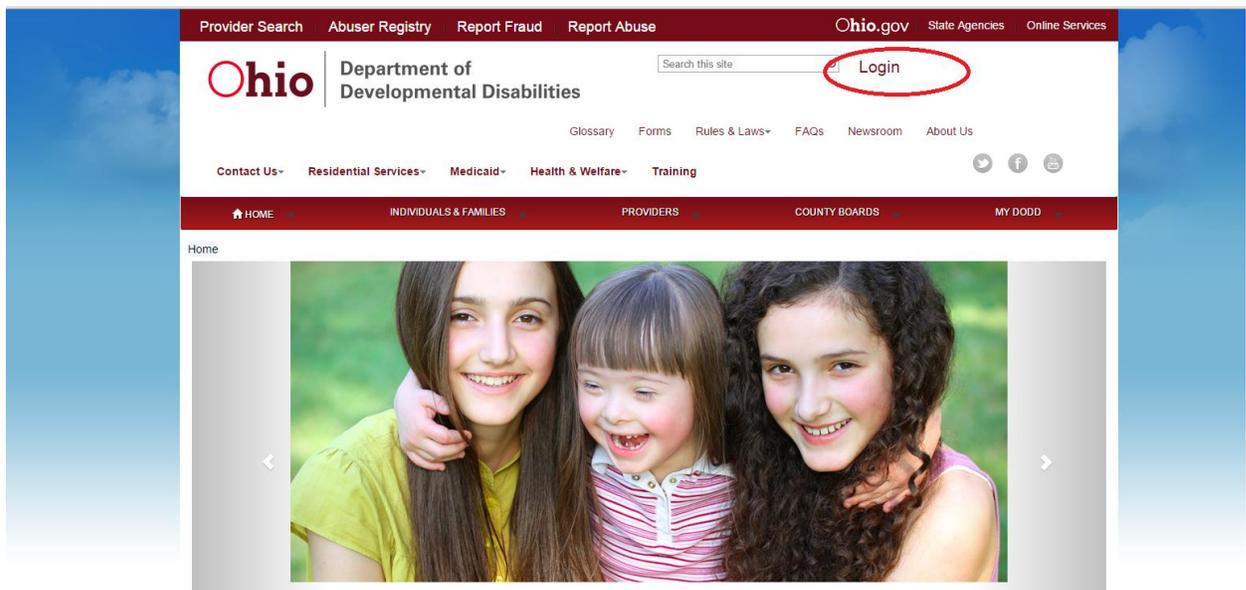


4. County Board Evaluator

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, each with a search bar and a table of records. Annotations with blue arrows point to specific sections:

- 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.
- Incomplete LOCs:** A table with columns: Individual, Created On, LOC Type, LOC Status, DODD LOC Determination Status, and Status. A note indicates: "Will see LOCs marked Incomplete 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.
- 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....
- My Alerts:** A table with columns: Priority, Subject, Individual, Regarding, Assigned SSA, Owner, and Contact. It shows three rows of 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....



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.

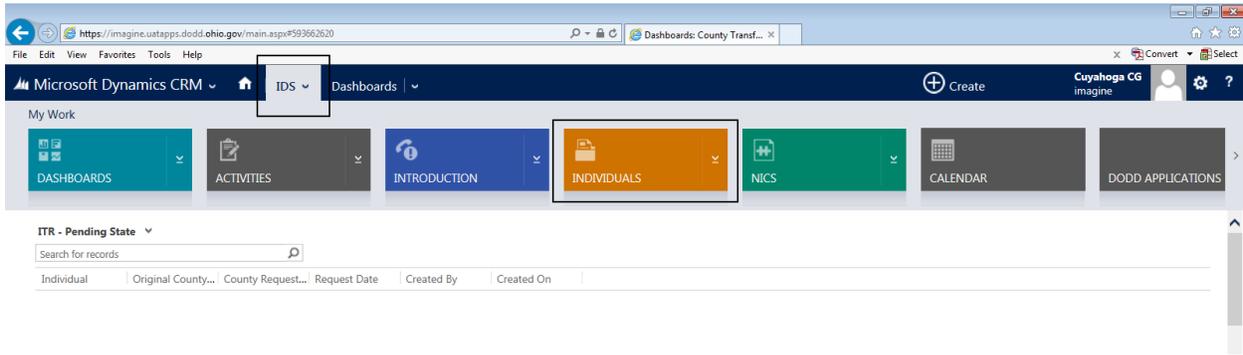
Note: If you have multiple roles, you might see the dashboard for any of those roles when you login (for eg: if you are a SSA and also have an Evaluator role – you can select either one of those dashboards as your default dashboard by clicking on “**Set as Default**” button.

Access Individual

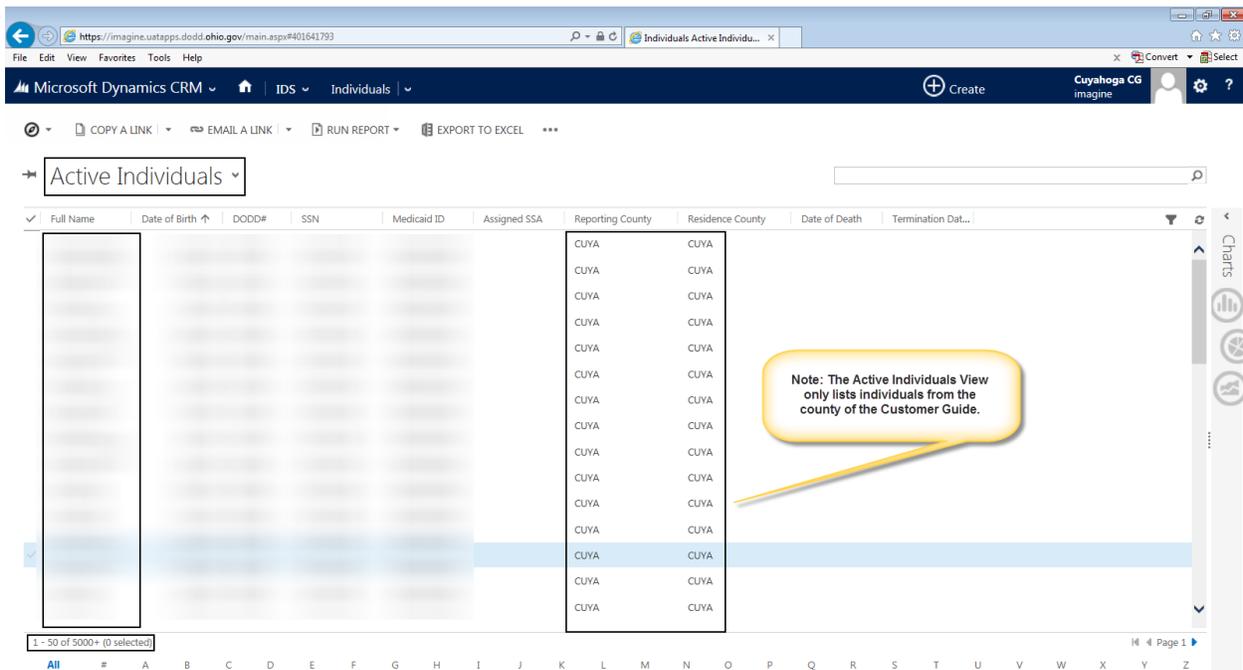
6. To access list of individuals in your county:

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.



Search Individual

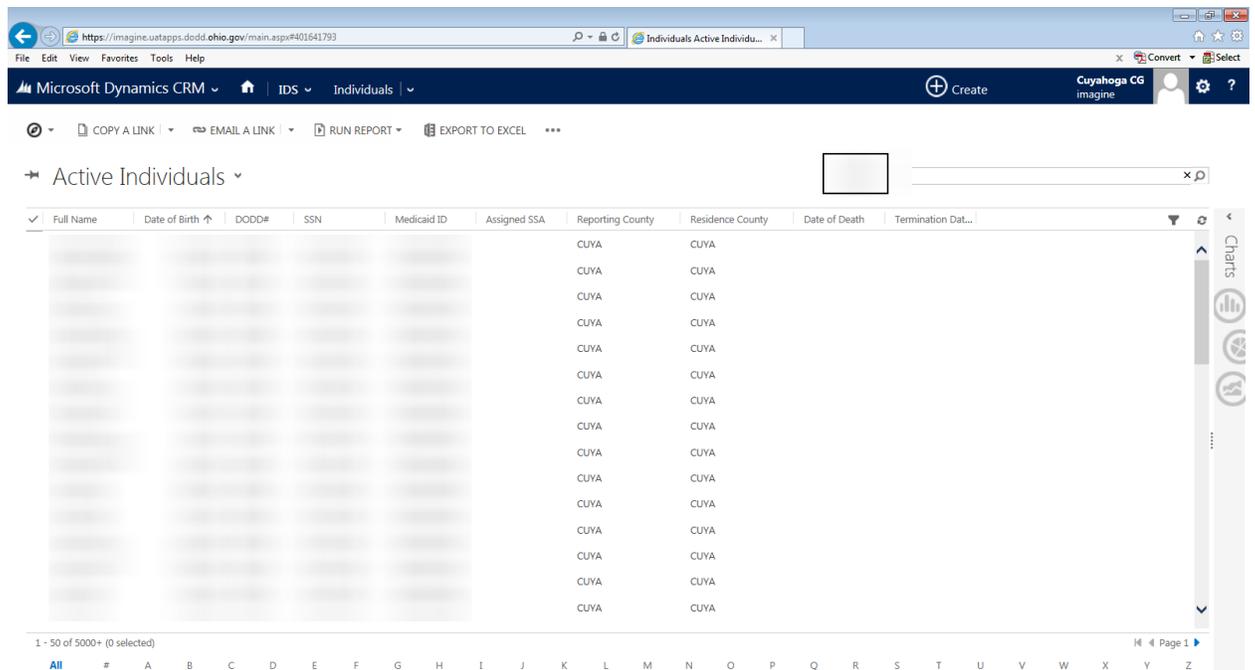
7. Follow these steps to Individual Search

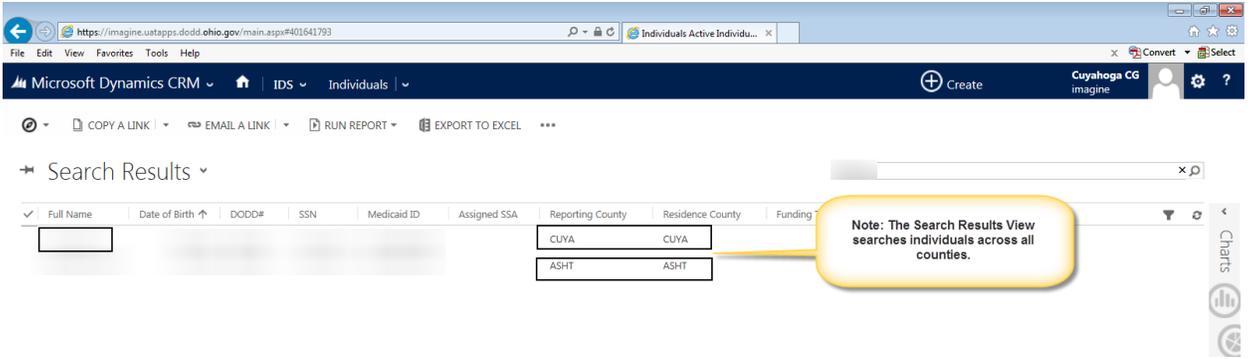


1. Search for individual by entering search criteria in the search box. Fields available to search on include: First Name, Last Name, Full Name (Ex. Jonathan Dawkins), Date of Birth, Medicaid #, SSN and DODD#.

Note: As an Evaluator you have the ability to search all individuals in your associated counties.

2. Hit **Enter** or click on the magnifying glass to search
3. Individual record(s) will be displayed if an individual exists in your associated counties.





Microsoft Dynamics CRM | IDS | Individuals

Search Results

Full Name	Date of Birth	DODD#	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County	Funding
						CUYA	CUYA	
						ASHT	ASHT	

Note: The Search Results View searches individuals across all counties.



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

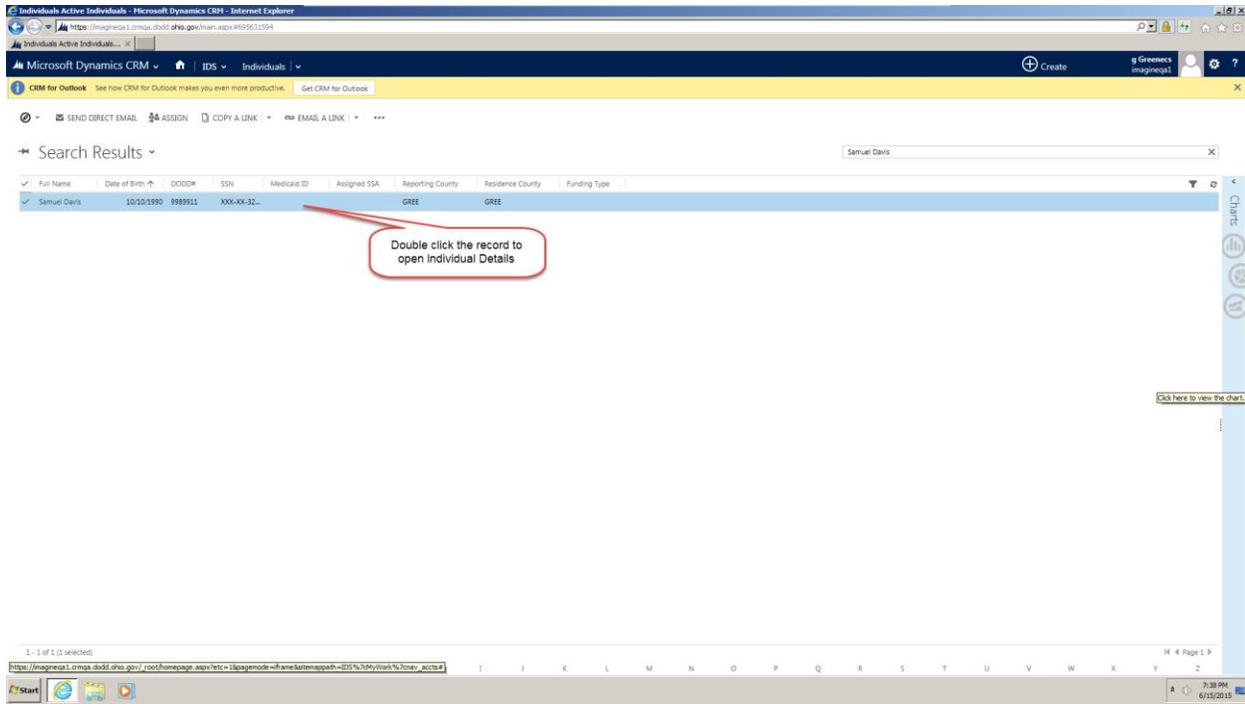
The screenshot displays the Microsoft Dynamics CRM interface. At the top, the browser address bar shows the URL: <https://magness1.ormga.dodh.gov/frames.aspx#959531394>. The CRM navigation bar includes 'Microsoft Dynamics CRM', 'IDS', and 'Individuals'. A search box at the top right contains the text 'Samuel Davis'. Below the search bar, a table displays search results. The table has columns for 'Full Name', 'Date of Birth', 'DODD*', 'SSN', 'Medicaid ID', 'Assigned SSA', 'Reporting County', 'Residence County', and 'Funding Type'. One result is shown for Samuel Davis, with a red box highlighting the row. The table data is as follows:

Full Name	Date of Birth	DODD*	SSN	Medicaid ID	Assigned SSA	Reporting County	Residence County	Funding Type
Samuel Davis	10/10/1990	9989111	XXX-XX-32...			GRE	GRE	

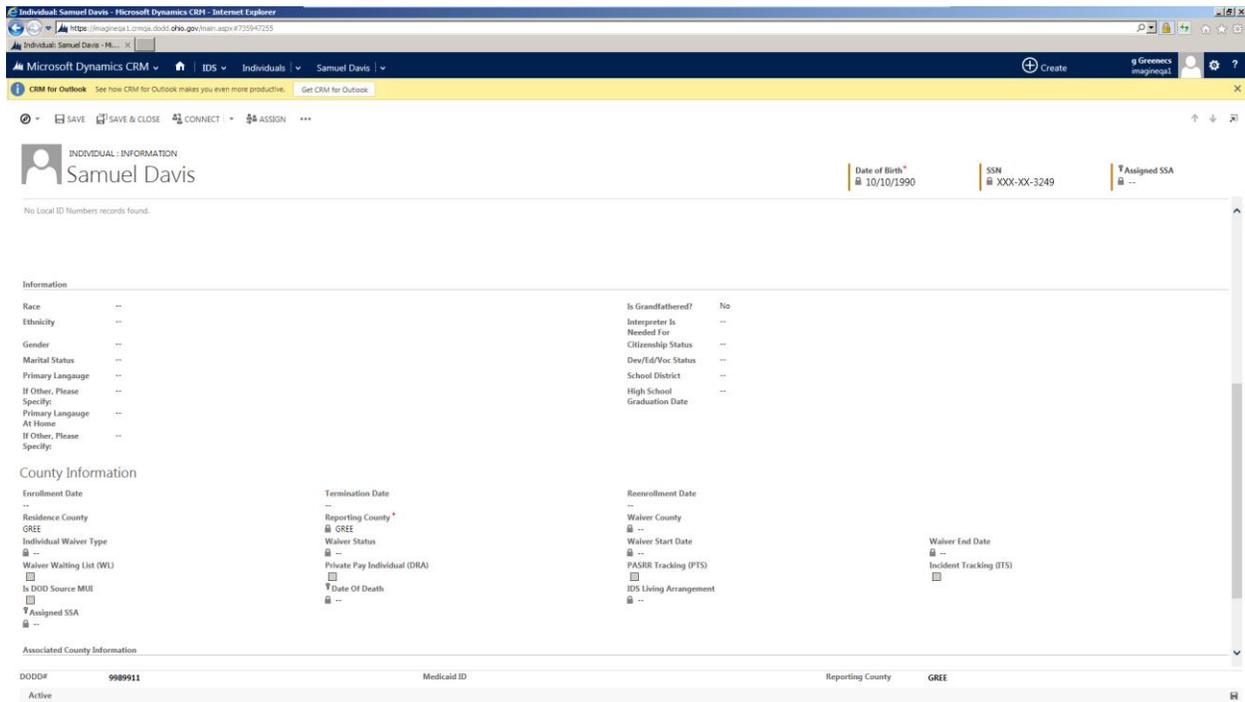
At the bottom of the screen, the Windows taskbar shows the Start button, system tray icons, and the date/time: 7:38 PM, 6/15/2015.



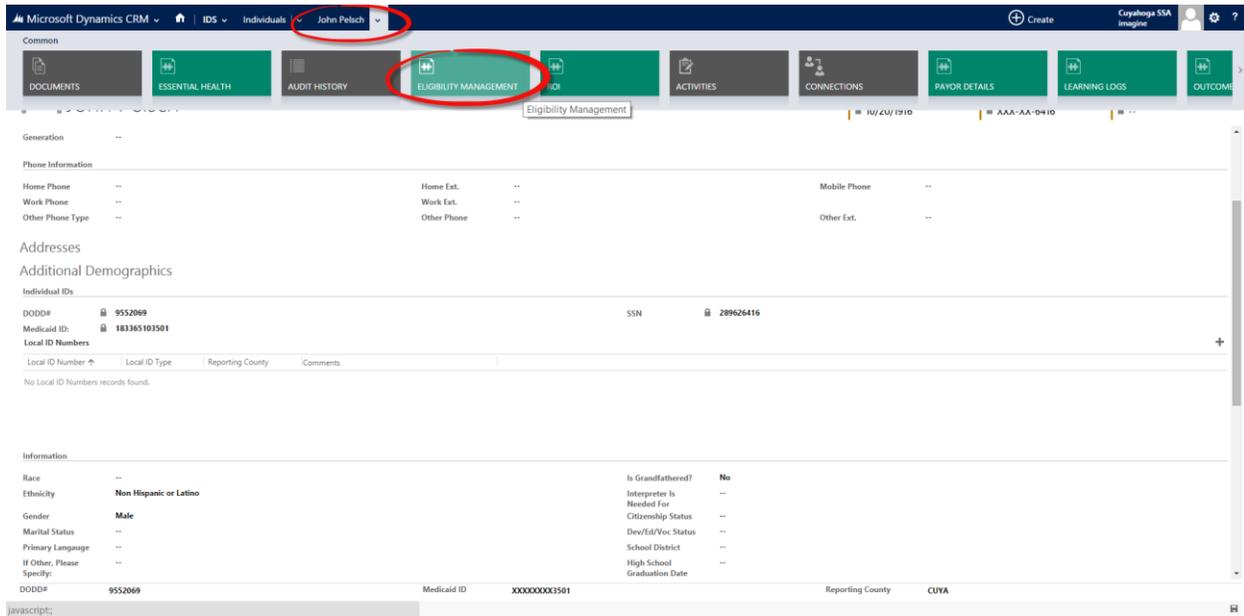
4. Double click on individual record to open individual's record



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



The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation pane shows a dropdown menu for 'John Pelsch' with the 'ELIGIBILITY MANAGEMENT' tile highlighted. The main content area shows the 'Eligibility Management' view for the individual. The view includes sections for 'Generation', 'Phone Information', 'Addresses', 'Additional Demographics', and 'Information'. The 'Additional Demographics' section shows the following data:

Local ID Number	Local ID Type	Reporting County	Comments
No Local ID Numbers records found.			

The 'Information' section shows the following data:

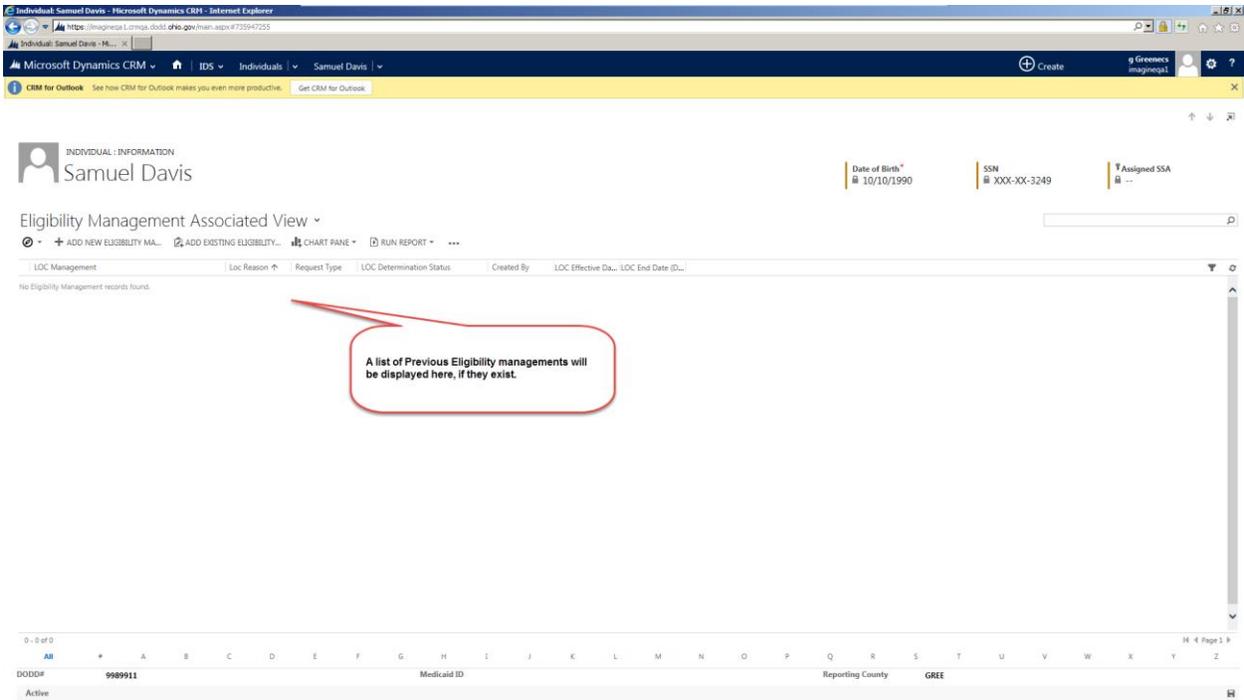
Field	Value	Field	Value
Race	--	Is Grandfathered?	No
Ethnicity	Non Hispanic or Latino	Interpreter Is Needed For	--
Gender	Male	Citizenship Status	--
Marital Status	--	Dev/Ed/Voc Status	--
Primary Language	--	School District	--
If Other, Please Specify:	--	High School Graduation Date	--

At the bottom of the page, the following information is displayed:

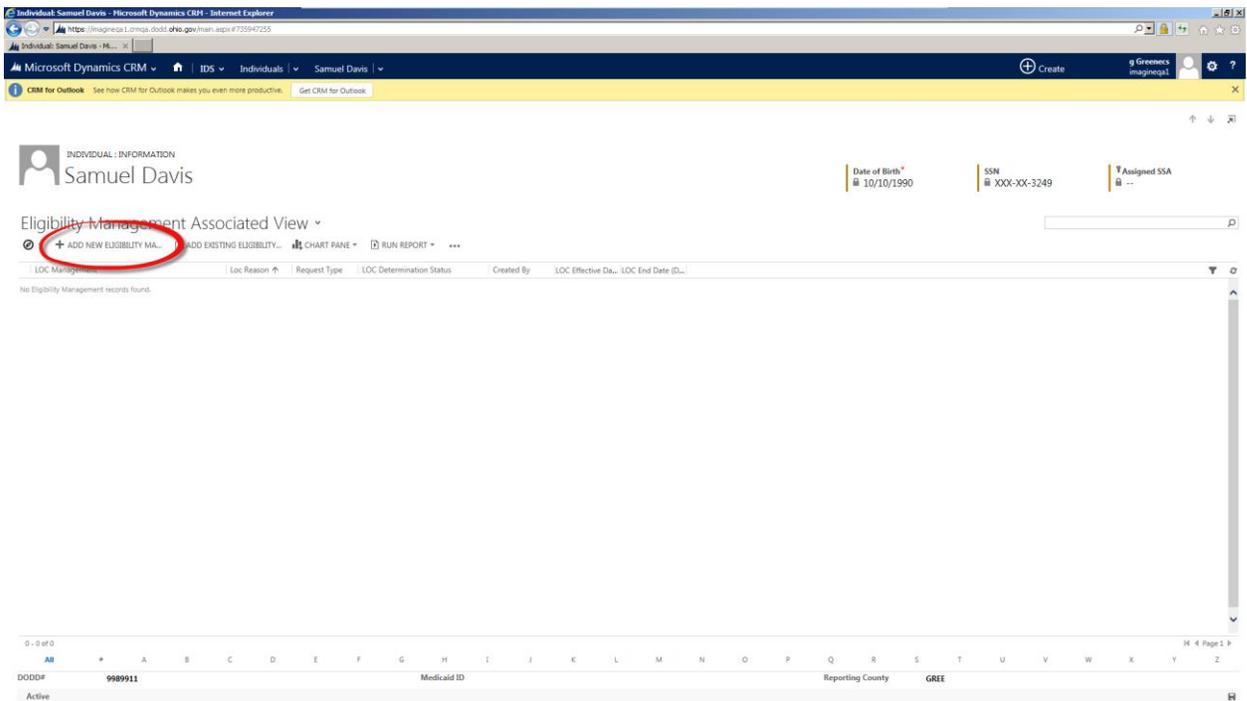
DODD#	9552069	Medicaid ID	XXXXXXXXX3501	Reporting County	CUYA
-------	---------	-------------	---------------	------------------	------

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 given 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

Microsoft Dynamics CRM - New Eligibility Man...

SAVE & CLOSE + NEW HOSKIS GUID GETTER

ELIGIBILITY MANAGEMENT : INFORMATION

New Eligibility Management

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

Initial (Active) LOC DDDD 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

Best way to communicate (Preferred Method)

Age for Assessment

County Proposed Effective Date

LOC Effective End Date

Individual DETAILS

Full Name Samuel Davis

DDDD# 9989911

Date of Birth* 10/10/1990

Age 24 yrs

ED 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

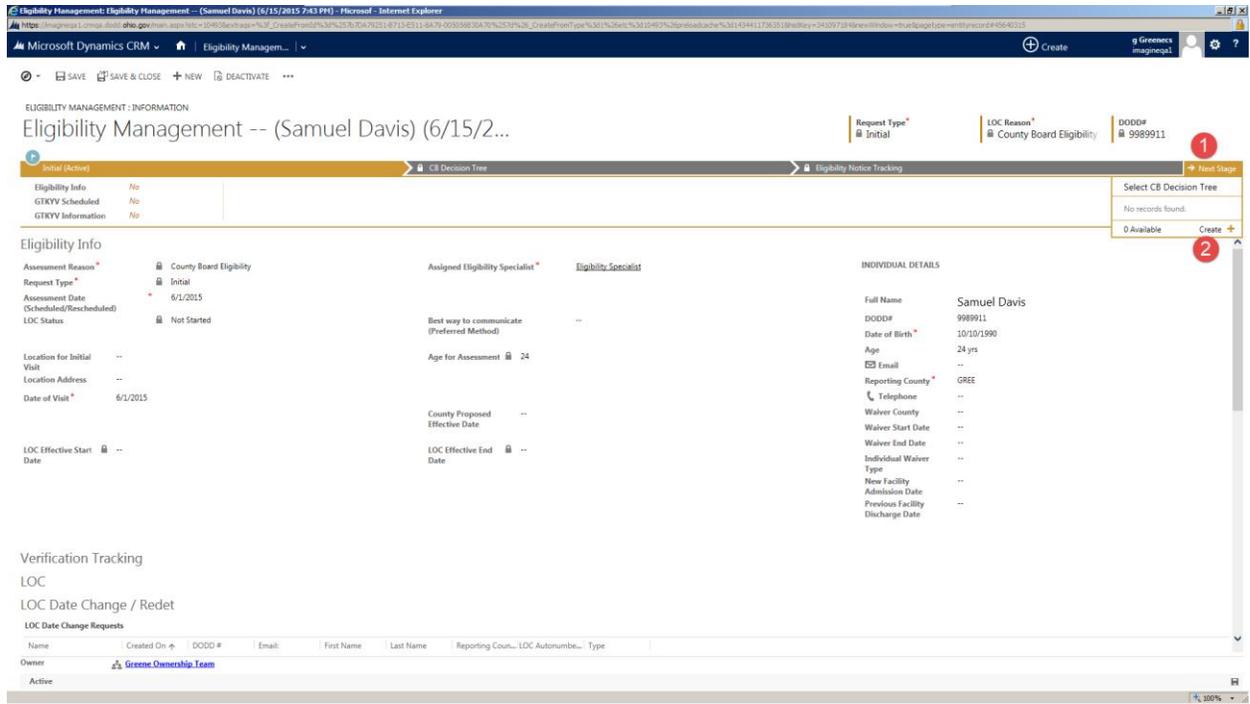
Name	Created On	DDDD #	Email	First Name	Last Name	Reporting Count	LOC Autonumber	Type
To enable this content, create the record.								

Owner: Greene Ownership Team

Active



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

The screenshot shows the 'New CB Decision Tree' form in Microsoft Dynamics CRM. The 'Date of Determination' field is set to 6/15/2015. A red callout box points to this field with the text: "can be today's or past date. This is a required field". The form also includes fields for 'Determined By' (g Greenec), 'Assessment Reason' (County Road Eligibility), and 'Individual' (Samuel Davis). Below these fields, there is a section for 'For ages 10 and above- OPT-OUT' with several questions and dropdown menus for answers.

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



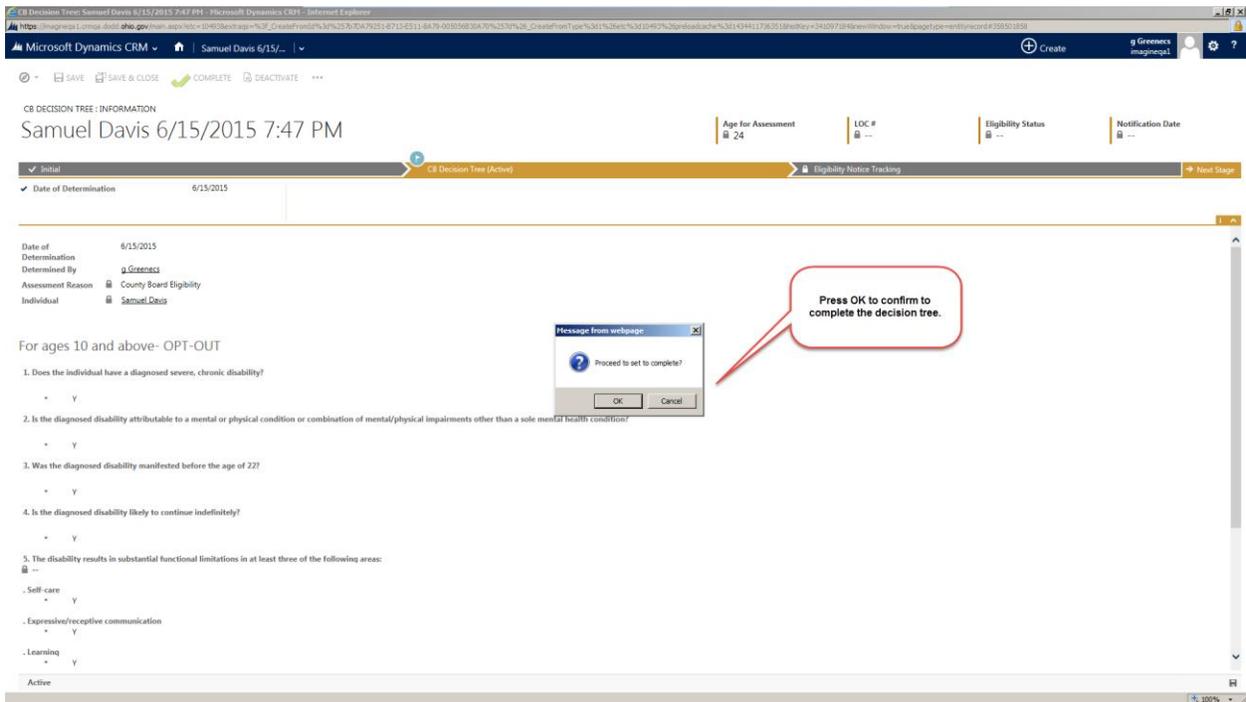
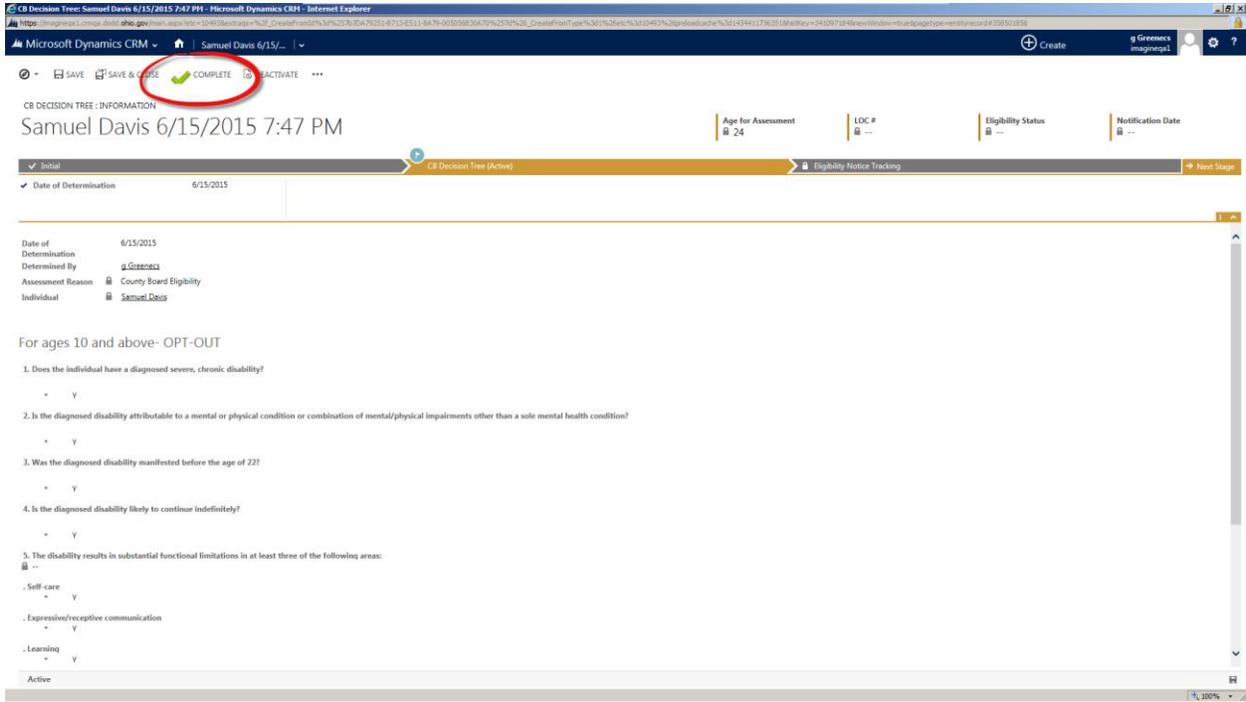
The screenshot shows the Microsoft Dynamics CRM interface for a 'New CB Decision Tree'. The browser address bar shows a URL from 'dhs.gov'. The CRM navigation bar includes 'Microsoft Dynamics CRM' and 'New CB Decision Tr...'. The main header area contains 'CB DECISION TREE: INFORMATION' and 'New CB Decision Tree'. On the right, there are fields for 'Age for Assessment' (24), 'LOC #', 'Eligibility Status', and 'Notification Date'. Below this is a breadcrumb trail: 'Initial' > '24810612670' > 'CB Decision Tree (Active)' > 'Eligibility Notice Tracking'. The main content area is a form titled 'For ages 10 and above- OPT-OUT' with the following questions:

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

A blue arrow points from the right side of the form towards the 'SAVE' button, with the text 'Answer all questions in the decision tree and Click on Save button'.



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

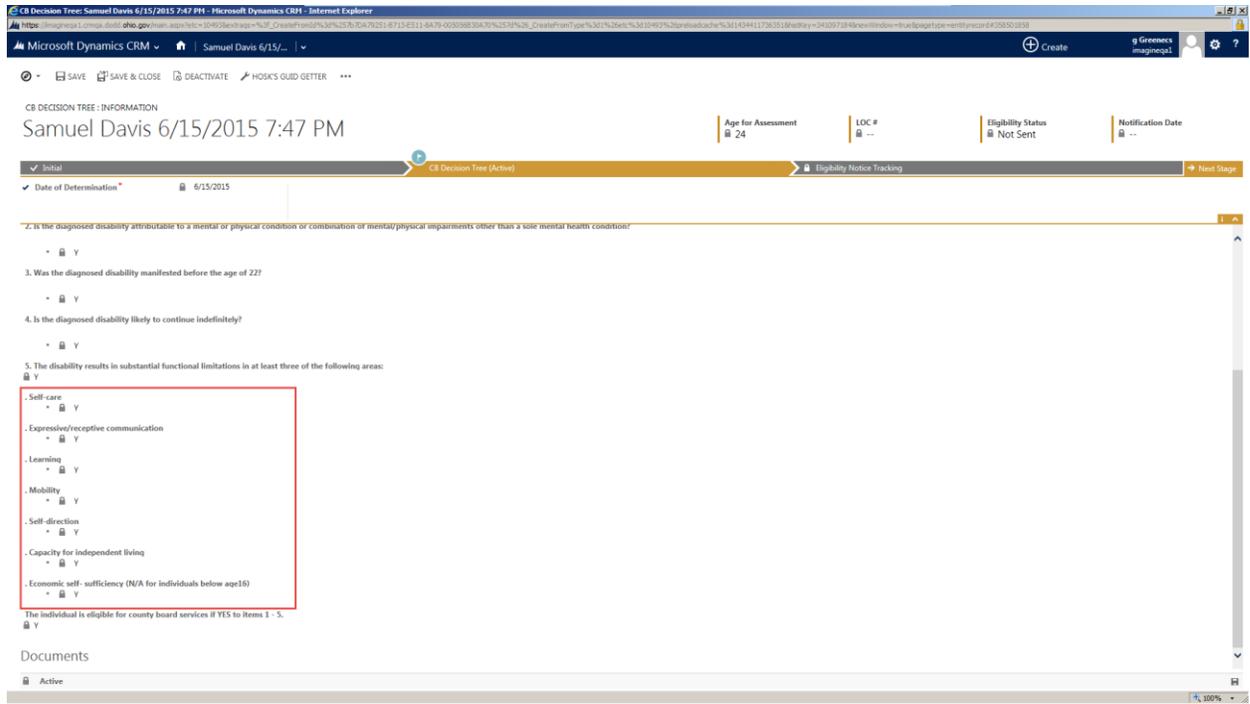


15. Once Decision Tree is Completed → **Decision Tree becomes read only**; user will see the lock symbol next to all the fields and cannot edit anything now.

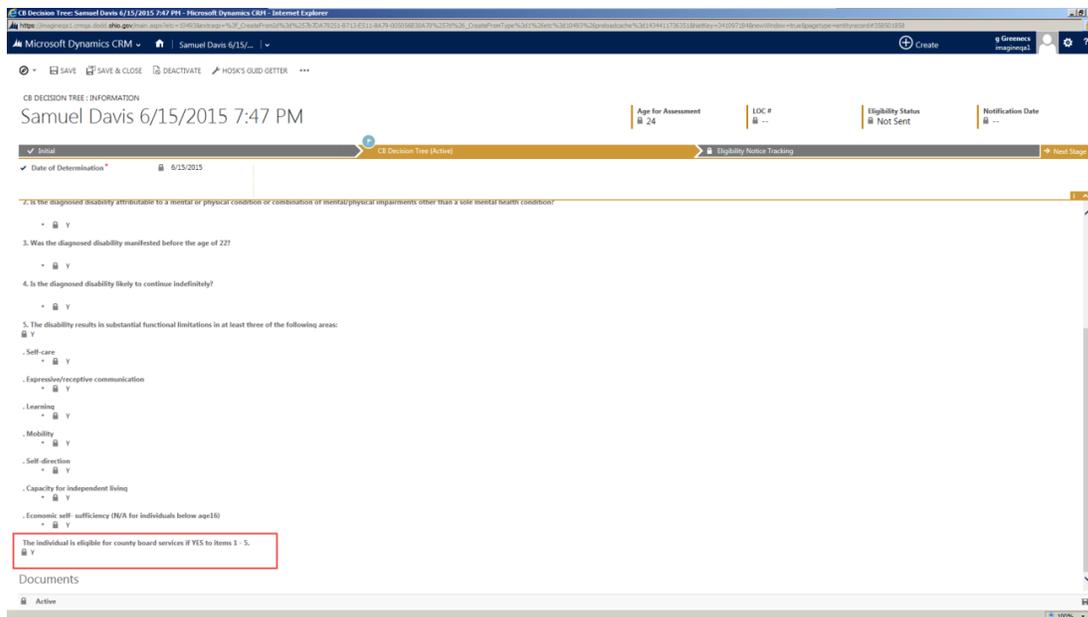
The screenshot displays the Microsoft Dynamics CRM interface for a 'CB Decision Tree' record. The record is for 'Samuel Davis' dated '6/15/2015 7:47 PM'. The form is in a 'read-only' state, as evidenced by the lock icons on the input fields. A red callout box highlights this state with the text: "Once decision tree is completed, the while form becomes read-only and cannot be edit further." The form includes a metadata section with fields like 'Date of Determination', 'Determined By', 'Assessment Reason', and 'Individual'. Below this is a section titled 'For ages 10 and above- OPT-OUT' containing a series of questions with 'Y' or 'N' responses, all of which are locked. The status bar at the bottom indicates the record is 'Active'.



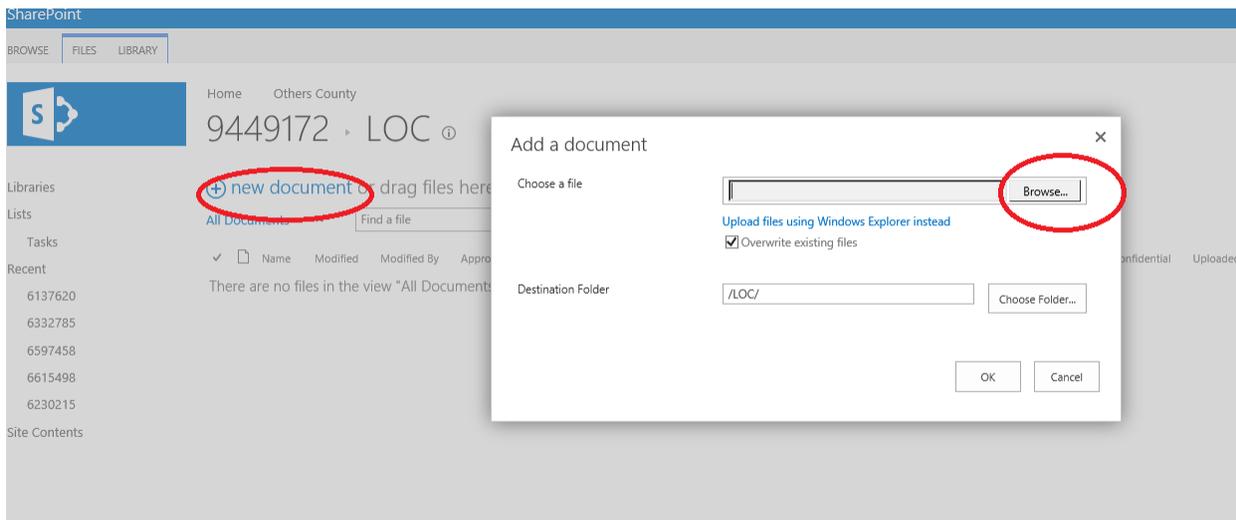
16. User can view Y/N answer for question 5 after Decision Tree is Completed



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

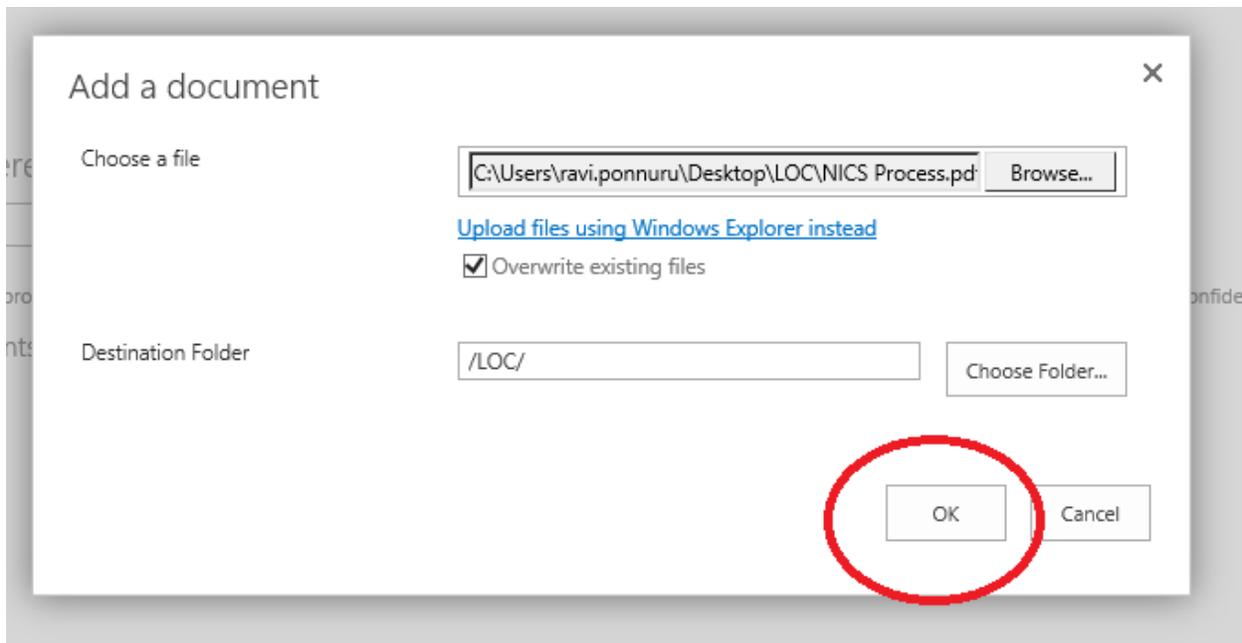


18. You can upload document to SharePoint at any time – before or after Completing the Decision Tree
19. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document to SharePoint**
 1. Click on **+new document**
 2. Click on **chose file**



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



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

The screenshot displays the Microsoft Dynamics CRM interface for a decision tree. The title bar shows "CB Decision Tree: Samuel Davis 6/15/2015 7:47 PM". The main content area shows the decision tree progress: Initial → CB Decision Tree (Active) → Eligibility Notice Tracking → Next Stage. A red circle with the number "1" highlights the "Next Stage" button. A dropdown menu is open, showing "Select Eligibility Notice Tracking" and "Samuel Davis (6/15/2015 7:...)". A red circle with the number "2" highlights the "1 Available" option. The interface also shows fields for "Age for Assessment" (24), "LOC #", "Eligibility Status" (Not Sent), and "Notification Date". Below the decision tree, there is a section for "Date of Determination" (6/15/2015) and a list of questions related to the disability determination process, such as "1. Does the individual have a diagnosed severe, chronic disability?".

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)



Microsoft Dynamics CRM | Samuel Davis (6/15/2015) | Create | Greenecms | magnecol

ELIGIBILITY NOTICE TRACKING : INFORMATION
Samuel Davis (6/15/2015 7:49 PM) -- Eligibility N...

Individual: Samuel Davis | LOC #: -- | Age for Assessment: 24

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

Date Notification Sent: 6/15/2015

Documentation of Eligibility / Ineligibility Notice

Type of Notification	Eligible
Date Notification Sent	6/15/2015
To whom it was sent	--
Assigned SSA	--
Deadline for first contact	--

CustomerGuide Contact Details

Name: --
Contact: --

Eligibility/Ineligibility Letter
[Eligibility Letter - Age 6 and above](#)

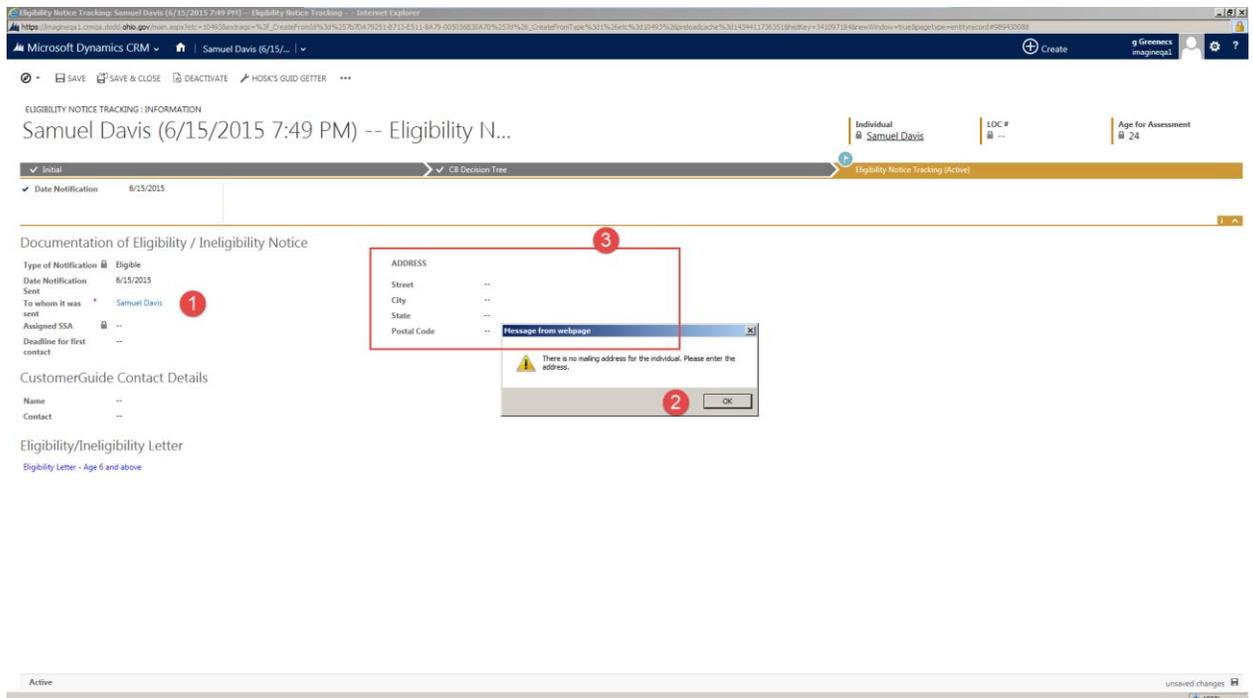
Active | unsaved changes | 100%

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**

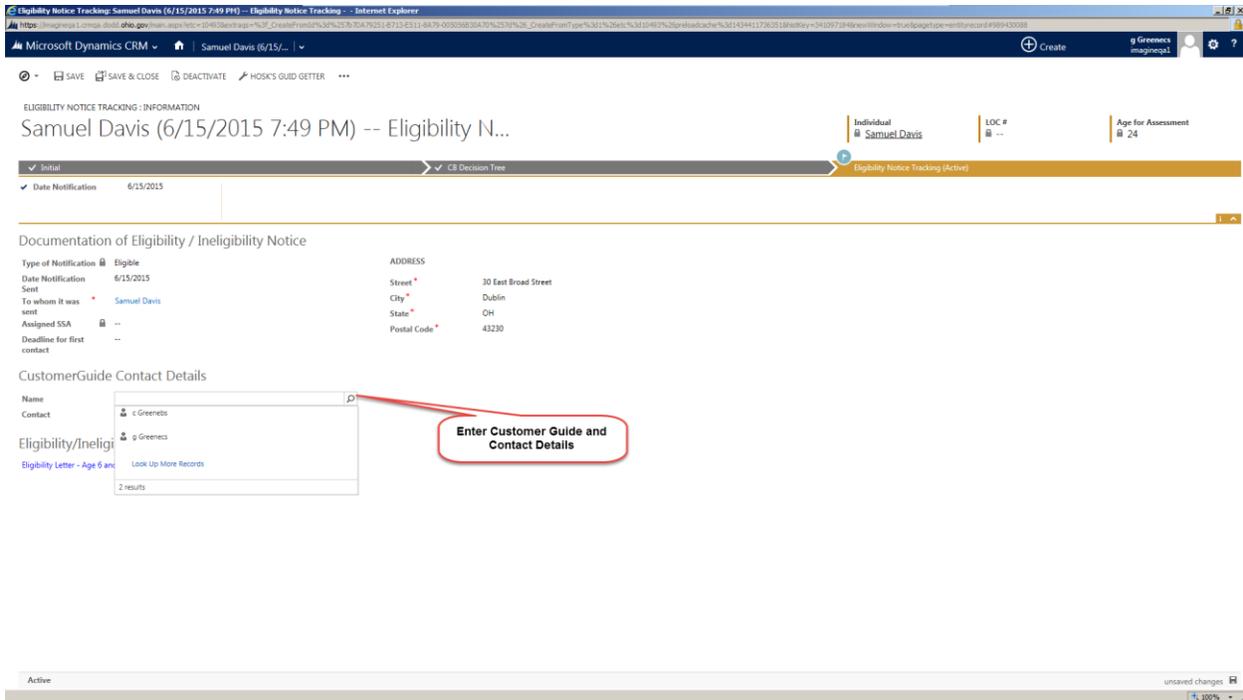
1. By selecting the Individual’s name or individual’s parent or guardian’s name from the option set.



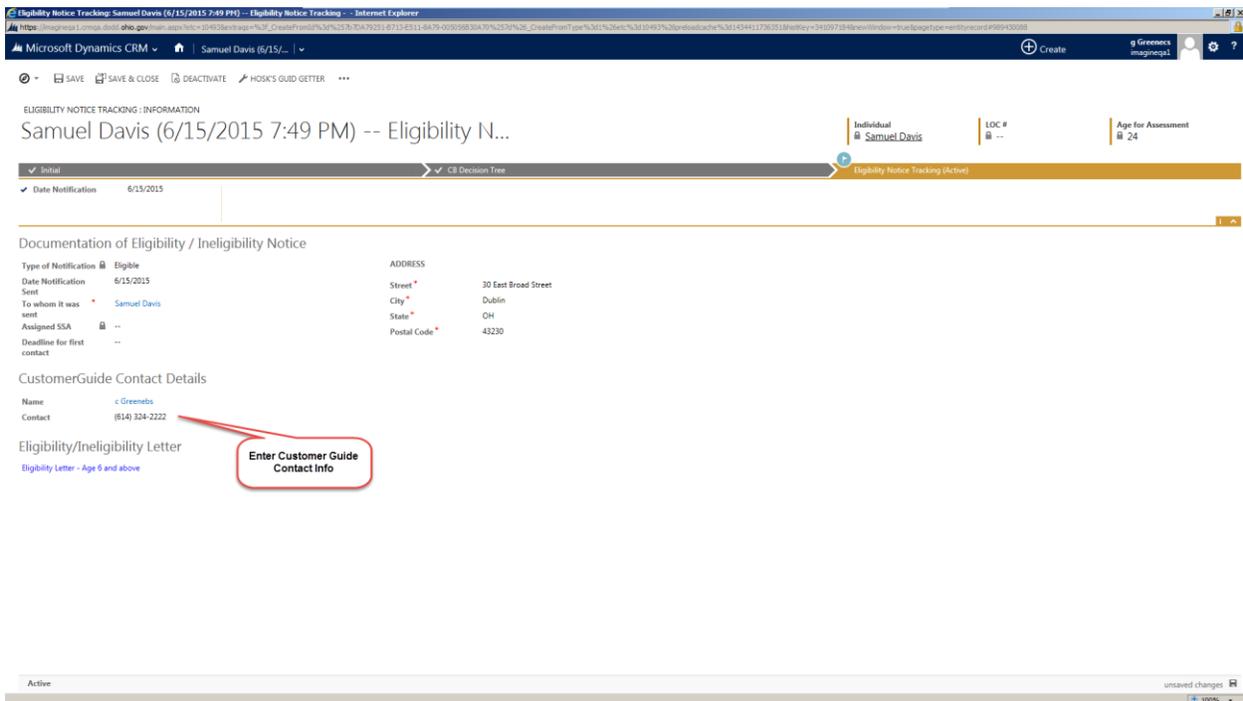


2. If the person to whom the mail has to be sent does not have mailing address, system will prompt you to enter mailing address. Press OK to confirm.
3. **Enter the mailing address** for the individual. Address will be prefilled if individual have a mailing address on his profile
6. **Select a Customer 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.



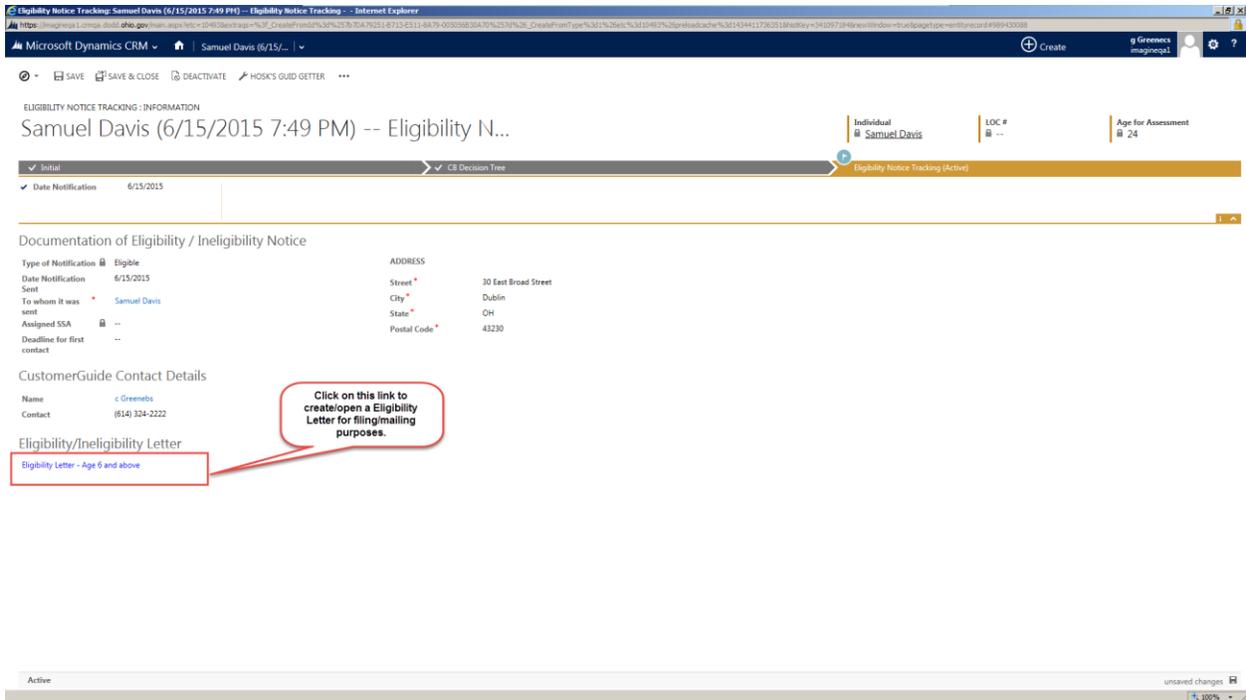


15. Enter Customer Guide's contact information

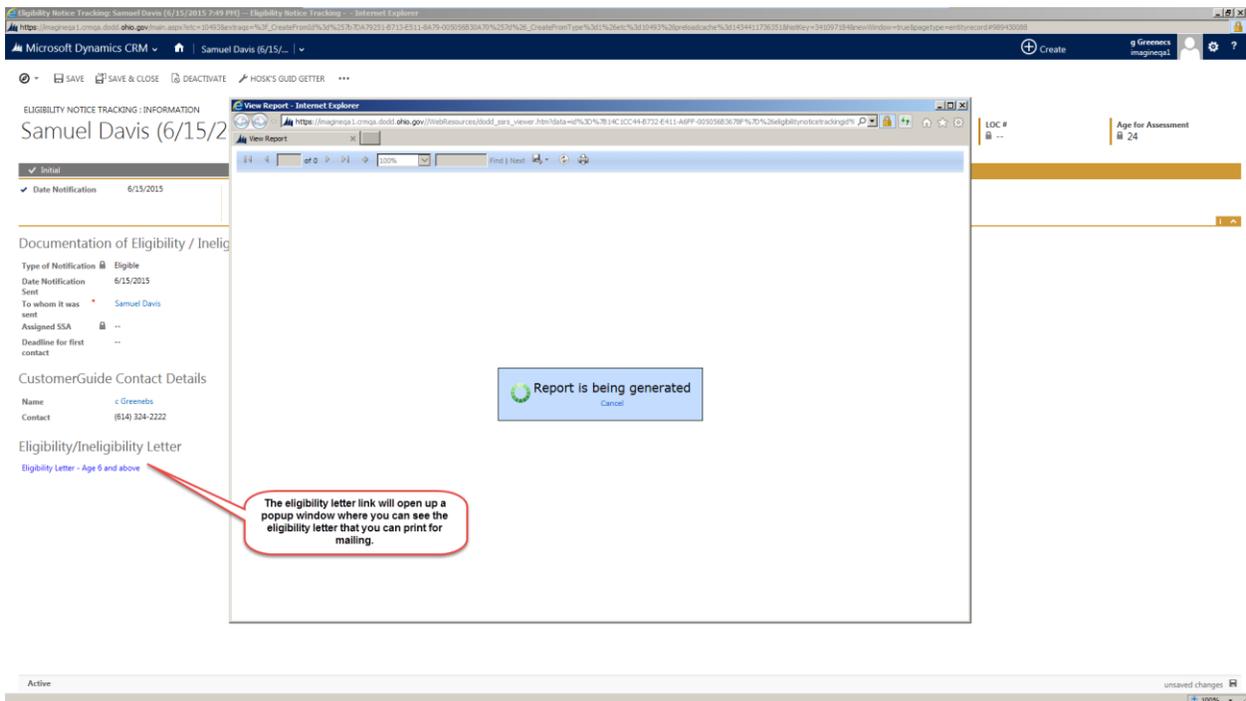


16. Open the **Eligible/Ineligible Notice** by clicking on the link under the Eligibility/Ineligibility Letter Tab



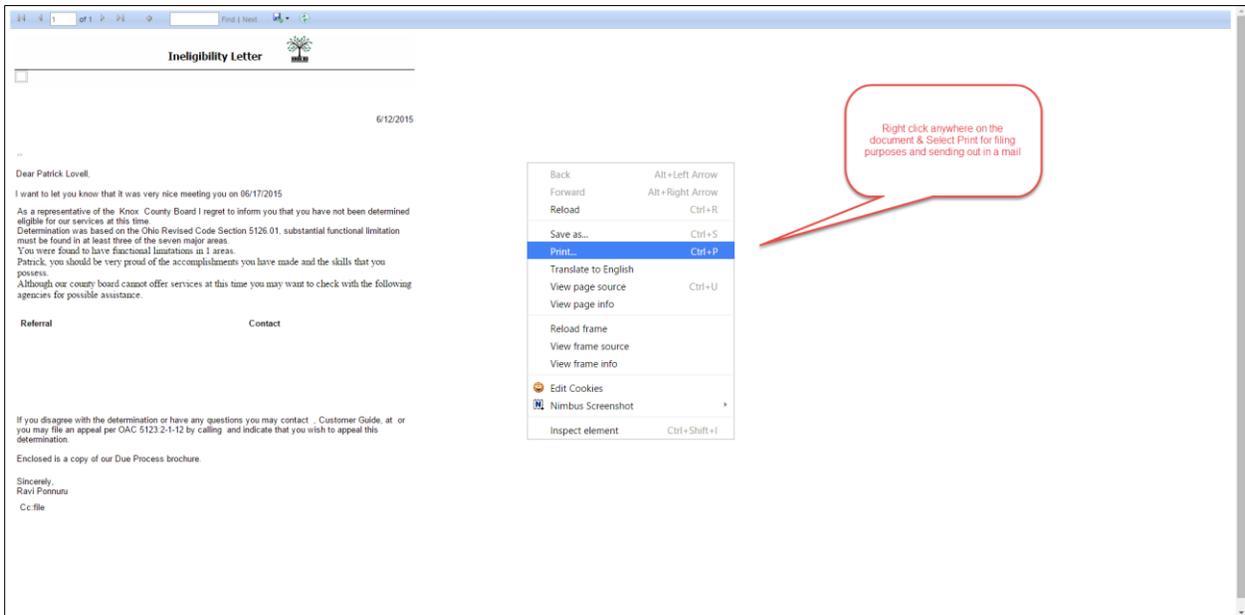


17. Eligible/Ineligible Notice will open in a new tab





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



You just completed the County Board eligibility for an individual



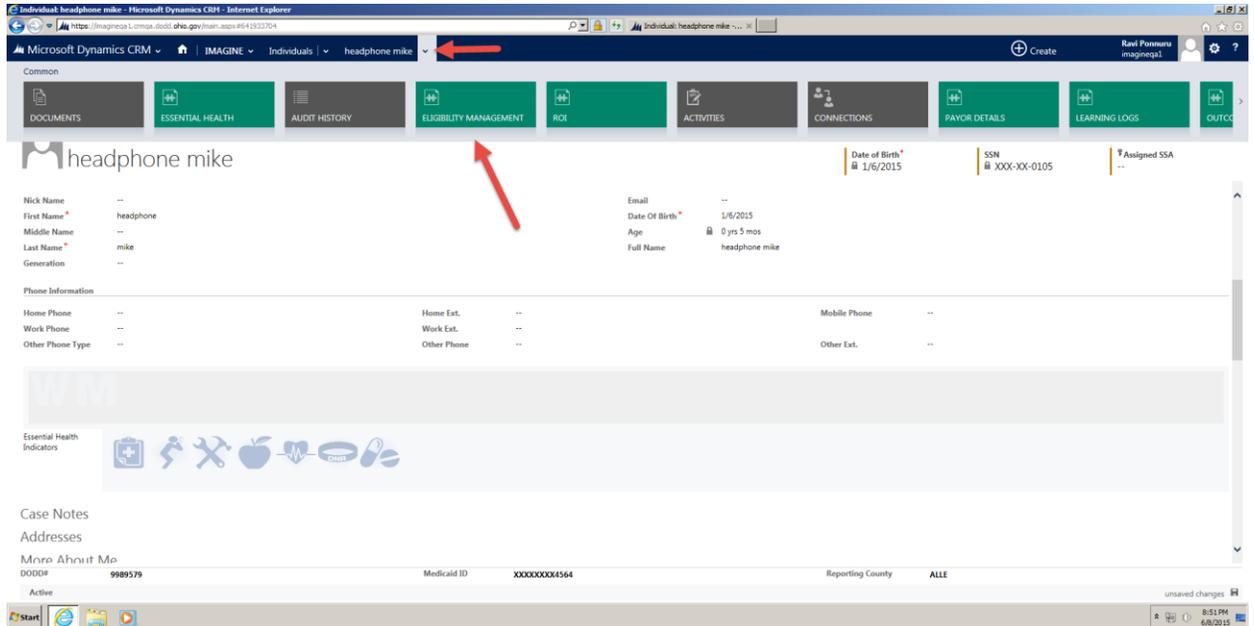
LOC for County Board Eligibility (Applies to only 10 & above individuals)

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 displays the Microsoft Dynamics CRM interface for an individual record. The top navigation bar includes 'Microsoft Dynamics CRM', 'IMAGINE', 'Individuals', and 'headphone mike'. 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 the banner, the record details for 'headphone mike' are shown. The 'INDIVIDUAL INFORMATION' section includes fields for Nick Name, First Name (headphone), Middle Name, Last Name (mike), and Generation. The 'Date of Birth' is 1/6/2015, and the 'SSN' is XXX-XX-0105. The 'Phone Information' section lists Home, Work, and Other phone numbers and extensions. Below this is a section for 'Essential Health Indicators' with various icons. The 'Case Notes' and 'Addresses' sections are also visible. At the bottom, the 'Addresses' section shows 'Mona Ahnif Ma' with a 'Medicaid ID' of XXXXXXXX4564 and a 'Reporting County' of ALLE. The status is 'Active'.

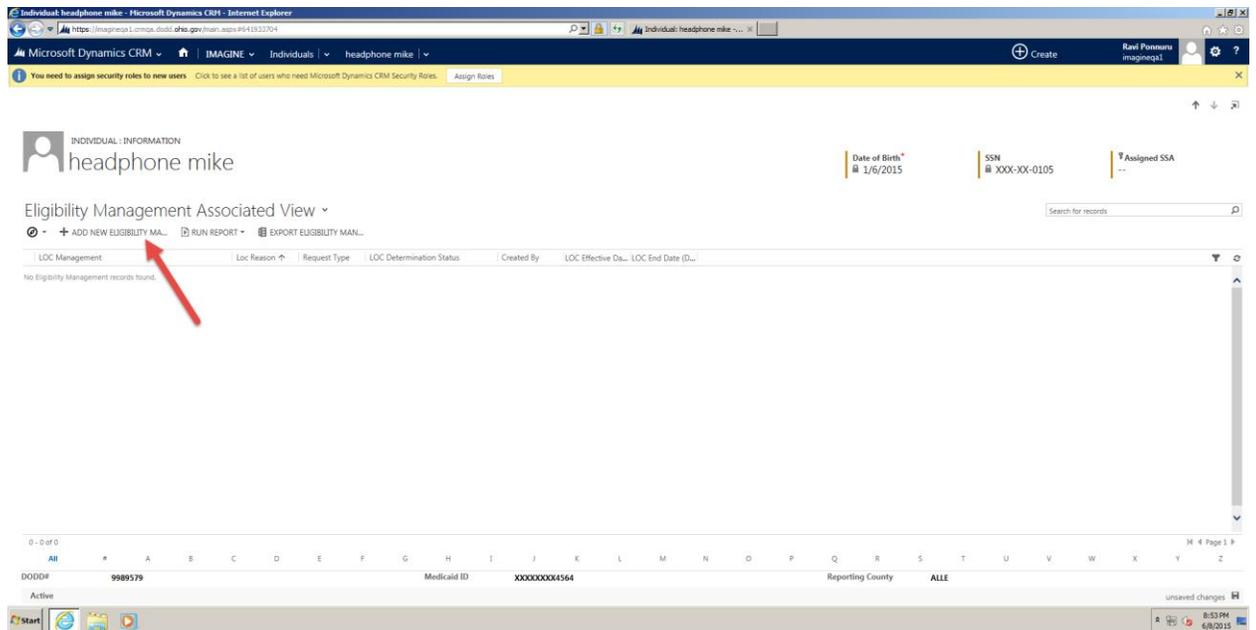


6. Start Eligibility Process - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



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
 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 displays the 'New Eligibility Management' form in Microsoft Dynamics CRM. The form is in the 'Initial' stage. Red circles 1 through 6 highlight key fields: 1. Assessment Reason (County Board Eligibility), 2. Request Type (Initial), 3. Assessment Date (6/2/2015), 4. Date of Visit (6/11/2015), 5. Assigned Eligibility Specialist (EligibilitySpec Test), and 6. The Save button. The form also shows individual details for Ada Lovelace.

Field	Value
Assessment Reason	County Board Eligibility
Request Type	Initial
Assessment Date (Scheduled/Rescheduled)	6/2/2015
LOC Status	Not Started
Location for Initial Visit	--
Location Address	--
Date of Visit	6/11/2015
LOC Effective Start Date	--
Assigned Eligibility Specialist	EligibilitySpec Test
Best way to communicate (Preferred Method)	--
Age for Assessment	--
County Proposed Effective Date	--
LOC Effective End Date	--
Individual Name	Ada Lovelace
DODD#	9989574
Date of Birth	5/13/2009
Age	6 yrs 0 mos
Email	--
Reporting County	BELM
Telephone	--
Waiver County	--
Waiver Start Date	--
Waiver End Date	--
Individual Waiver Type	--
New Facility Admission Date	--
Previous Facility Discharge Date	--



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

The screenshot shows the Microsoft Dynamics CRM interface for Eligibility Management. The top navigation bar includes 'Initial (Active)', 'LOC', 'CB Decision Tree', 'Eligibility Notice Tracking', and 'Next Stage'. A 'Select LOC' dropdown menu is open, showing '0 Available' and a 'Create +' button. The main area displays 'Eligibility Info' and 'INDIVIDUAL DETAILS' for Patrick Lovell.

Eligibility Info		Assigned Eligibility Specialist		INDIVIDUAL DETAILS	
Assessment Reason	County Board Eligibility	I Knox		Full Name	Patrick Lovell
Request Type	Initial			DODD#	9889018
Assessment Date (Scheduled/Rescheduled)	6/1/2015			Date of Birth	2/25/1992
LOC Status	Not Started	Best way to communicate (Preferred Method)		Age	23 yrs
Location for Initial Visit	--	Age for Assessment		Email	--
Location Address	--	23		Reporting County	KNOX
Date of Visit	6/17/2015	County Proposed Effective Date		Telephone	--
		--		Waiver County	--
LOC Effective Start Date	--	LOC Effective End Date		Waiver Start Date	--
Date	--	Date		Waiver End Date	--
				Individual Waiver Type	--

11. User will be now be on the LOC tool



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)
- Walver Type: -- (locked)
- County Proposed Effective Date: 6/9/2015 (locked)
- Date of Assessment: 6/9/2015 (locked)
- County: KNOX (locked)
- Assigned Evaluator: A KnoxSS (locked)

The 'Individual Details' section contains the following fields:

- Full Name: Patrick Lovell
- Date of Birth: 2/25/1992
- SSN: XXX-XX-5817
- Medicaid ID: XXXXXXXX8399

Red arrows in the image point to the lock symbols on the LOC Type, Assessment Reason, LOC Status, Walver Type, Date of Assessment, County, and Assigned Evaluator fields.

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

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

The screenshot shows the 'New LOC' form with red numbered callouts:

- 4**: Points to the 'SAVE' button in the top navigation bar.
- 1**: Points to the 'Walver Type' field, which is currently set to 'IO'.
- 2**: Points to the 'Document(s) Reviewed' text area, which contains the text 'Review with medical advisor'.
- 3**: Points to the 'Location of Assessment' dropdown menu, which is currently set to 'At Home'.

The 'General' section fields are:

- LOC Type: Initial (locked)
- Assessment Reason: County Board Eligibility (locked)
- LOC Status: Not Started (locked)
- Walver Type: IO (1)
- County Proposed Effective Date: -- (locked)
- Date of Assessment: 6/9/2015 (locked)
- County: KNOX (locked)
- Assigned Evaluator: A KnoxSS (locked)

The 'Individual Details' section fields are:

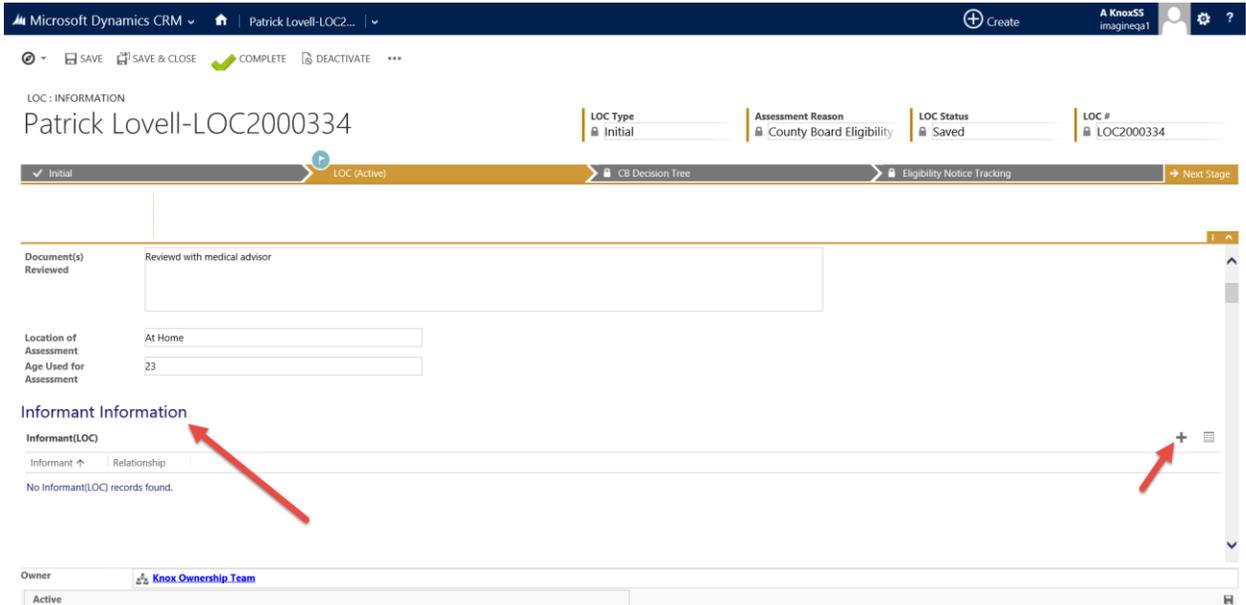
- Full Name: Patrick Lovell
- Date of Birth: 2/25/1992
- SSN: XXX-XX-5817
- Medicaid ID: XXXXXXXX8399

The 'Document(s) Reviewed' field contains: Review with medical advisor (2)

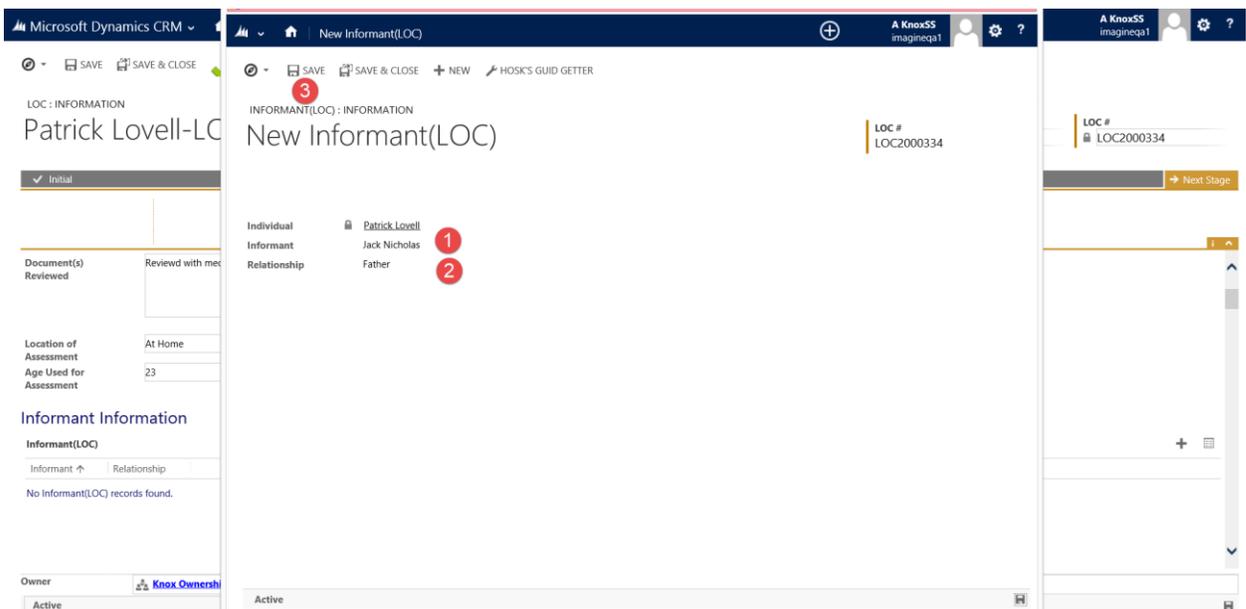
The 'Location of Assessment' field is: At Home (3)



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.



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

Microsoft Dynamics CRM | Patrick Lovell-LOC2000334

LOC : INFORMATION
Patrick Lovell-LOC2000334

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

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

1. Condition

A. A medical or psychological evaluation from a qualified clinician must be on file. Submission of the standardized diagnosis form is required, including the clinician’s license number, signature, and date.

A school psychologist who is not licensed in accordance with Ohio Administrative Code 3301-24-05 or chapter 4723 or licensed in another state as a psychologist as defined by applicable law is not considered a qualified clinician.

Clinician’s Name: Title: License #:

Ages 10 and above

C. Ages 10 and above

Does the clinician’s verification form indicate the individual is diagnosed severe, chronic disability?
+

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?
+

Owner: Knox Ownership Team
Active

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

Microsoft Dynamics CRM | IMAGINE | Individuals | Patrick Lovell-LOC2000334

LOC : INFORMATION
Patrick Lovell-LOC2000334

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

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

1. The individual is able to maintain competitive community employment or self-employment earning at least minimum wage

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

2. The individual is able to secure money in a safe location and to access it, when needed (Does not include assistance with transportation)

- * 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

G. 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 16 and above.)

- * Independently - The person can be left alone without any supervision

H. Health-related Supports

1. Frequency with which the individual requires assistance with medication administration.

Not applicable (n/a) for individuals Less than monthly

Owner: Knox Ownership Team
Active



20. Click on OK when it confirms to complete LOC

Microsoft Dynamics CRM | IMAGINE | Individuals | Patrick Lovell-LOC2000334

LOC: INFORMATION
Patrick Lovell-LOC2000334

LOC Type: Initial | Assigned Evaluator: A Knox55

Assessment Reason: County Board Eligibility | LOC Status: Saved | LOC #: LOC2000334

Individual Details:
Full Name: Patrick Lovell
Date of Birth: 2/25/1992
SSN: XXX-XX-5817
Medicaid ID: XXXXXXXX8399

Document(s) Reviewed: Reviewed with medical advisor

Location of Assessment: At Home | Age Used for Assessment: 23

Informant Information:
Informant: Jack Nicholas | Relationship: Father

Owner: Knox Omeship Team | Active

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.

Microsoft Dynamics CRM | IMAGINE | Individuals | Patrick Lovell-LOC2000334

LOC: INFORMATION
Patrick Lovell-LOC2000334

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

Individual Details:
Full Name: Patrick Lovell
Date of Birth: 2/25/1992
SSN: XXX-XX-5817
Medicaid ID: XXXXXXXX8399

Document(s) Reviewed: Reviewed with medical advisor

Location of Assessment: At Home | Age Used for Assessment: 23

Informant Information:
1. Condition
A medical or psychological evaluation from a qualified clinician must be on file. Submission of the standardized diagnosis form is required, including the clinician's license number, signature, and date.
A school psychologist who is not licensed in accordance with Ohio Administrative Code 3301-24-05 or chapter 4723 or licensed in another state as a psychologist as defined by applicable law is not considered a qualified clinician.

Clinician's Name: Dr. House | Title: Psychologist | License #: 324A05D3

Owner: Knox Omeship Team | Active

LOC becomes readonly once the COMPLETE button is clicked



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

Microsoft Dynamics CRM - Patrick Lovell-LOC2000334

LOC: INFORMATION
Patrick Lovell-LOC2000334

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

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

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 Functional Limitation Score: 0

6. Learning / Cognition

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

2. The individual is able to complete activities within the home that require remembering, decision-making, or judgment. (For individuals ages 16 and above.)

Independently - The person can be left alone without any supports

Learning / Cognition Score

Substantial Functional Limitation Score: 6

H. Health-related Supports

Owner: Knox Ownership Team

Active

23. View LOC Summary after LOC is Completed

Microsoft Dynamics CRM - Patrick Lovell-LOC2000334

LOC: INFORMATION
Patrick Lovell-LOC2000334

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

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

Unless you select other regional supervision for the clinical specialties listed:

Nurse (RN/LPN): Less than monthly
Speech Therapist: Less than monthly
Physical Therapist: Less than monthly
Occupational Therapist: 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:	N
- Self-care	N
- Expressive/receptive communication	N
- Learning	N
- Mobility	N
- Self-direction	N
- Capacity for independent living	N
- Economic self-sufficiency (N/A for individuals below age 16)	Y

LOC Total Score

Owner: Knox Ownership Team

Active



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

Microsoft Dynamics CRM | Patrick Lovell-LOC2000334

LOC: INFORMATION
Patrick Lovell-LOC2000334

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

Initial | **LOC (Active)** | CB Decision Tree | Eligibility Notice Tracking | Next Stage

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

- Self-care	N
- Expressive/receptive communication	N
- Learning	N
- Mobility	N
- Self-direction	N
- Capacity for independent living	N
- Economic self-sufficiency (N/A for individuals below age 16)	Y

LOC Total Score
1 Substantial Functional Limitation area was identified

Is LOC Eligible? N
Total Score 8

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

Owner: Knox Ownership Team | Active

25. Move to Decision Tree stage → by clicking on the

1. “Next Stage” &
2. Select the Determination Packet that is created

Microsoft Dynamics CRM | Patrick Lovell-LOC2000334

LOC: INFORMATION
Patrick Lovell-LOC2000334

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

Initial | LOC (Active) | CB Decision Tree | Eligibility Notice Tracking | **Next Stage**

Select CB Decision Tree (1)
Patrick Lovell (6/9/2015) (2)
1 Available

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

- Self-care	N
- Expressive/receptive communication	N
- Learning	N
- Mobility	N
- Self-direction	N
- Capacity for independent living	N
- Economic self-sufficiency (N/A for individuals below age 16)	Y

LOC Total Score
1 Substantial Functional Limitation area was identified

Is LOC Eligible? N
Total Score 8

LOC Notes
LOC Tool is completed

Owner: Knox Ownership Team | Active



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

Microsoft Dynamics CRM - Patrick Lovell (6/9/2015 11:12 AM) -- CB DecisionT...

Age for Assessment: 23 | LOC #: LOC2000334 | Eligibility Status: -- | Notification Date: --

Initial | LOC | **CB Decision Tree (Active)** | Eligibility Notice Tracking | Next Stage

Date of Determination: 6/9/2015

LOC Total Score: 1 Substantial Functional Limitation area was identified

Is LOC Eligible: N
Total Score: 8

For ages 10 and above - CB Eligibility(OPT-IN)

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:
 N

Active

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

Microsoft Dynamics CRM - Patrick Lovell (6/9/2015 11:12 AM) -- CB DecisionT...

Age for Assessment: 23 | LOC #: LOC2000334 | Eligibility Status: -- | Notification Date: --

Initial | LOC | **CB Decision Tree (Active)** | Eligibility Notice Tracking | Next Stage

For ages 10 and above - CB Eligibility(OPT-IN)

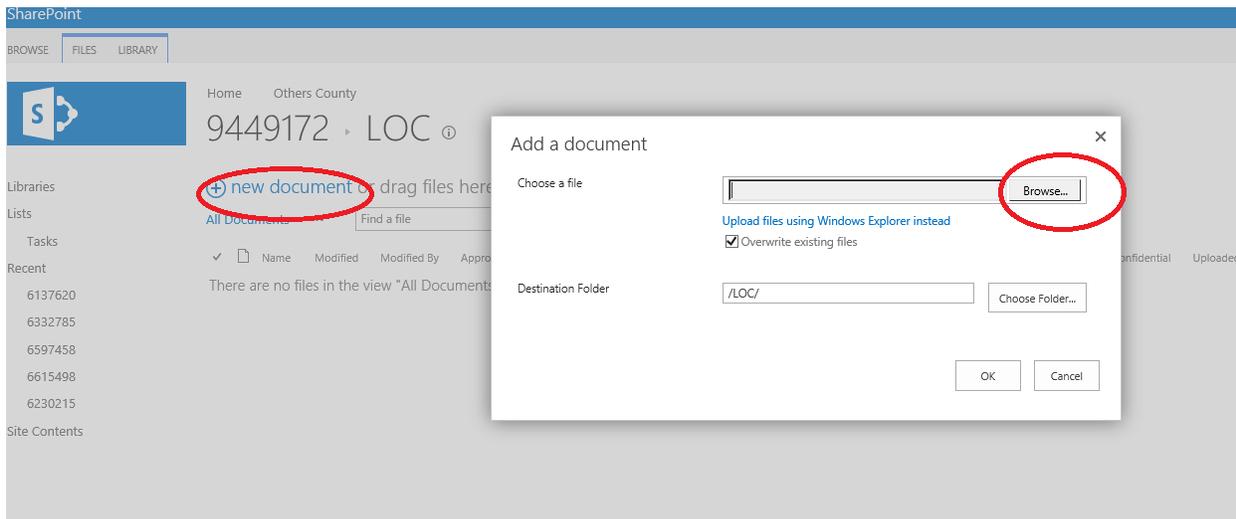
1. Does the individual have a diagnosed severe, chronic disability?
 Y
2. Is the diagnosed disability attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?
 Y
3. Was the diagnosed disability manifested before the age of 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:
 N

Self-Care
 N
Expressive/receptive communication
 N
Learning
 Y
Mobility
 N
Self-direction
 N
Capacity for independent living
 N
Economic self-sufficiency (N/A for individuals below 16)
 N

Active

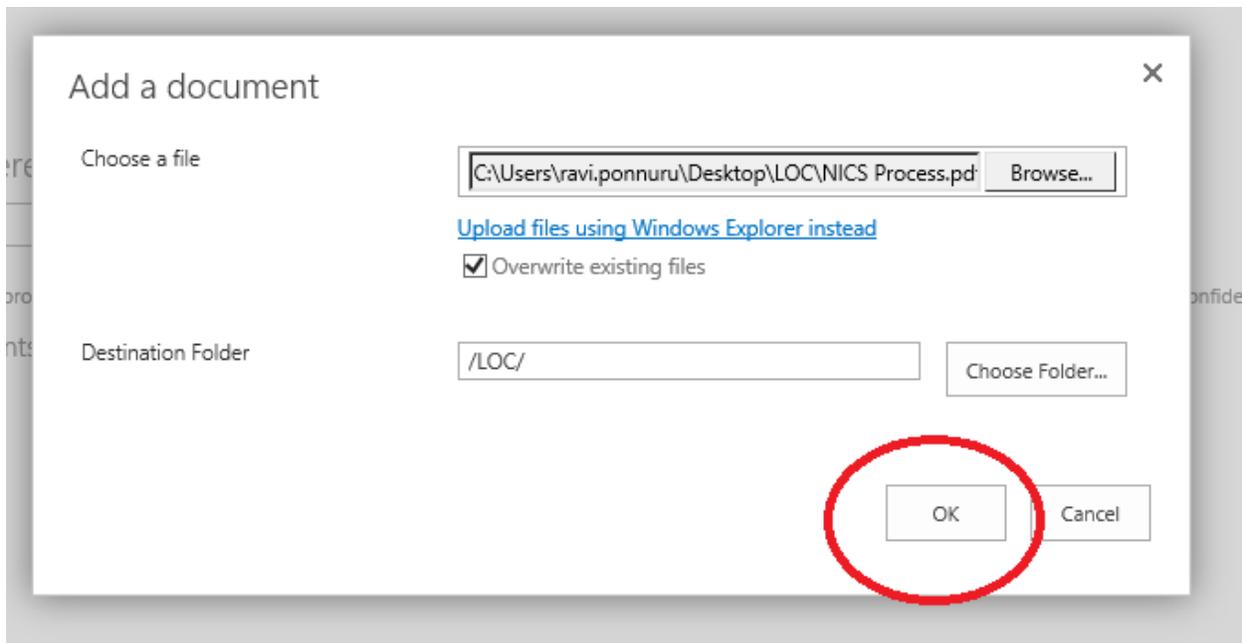


28. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document** to SharePoint
1. Click on **+new document**
 2. Click on **chose file**



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



1.

29. Move to **Eligibility Notice Tracking** stage → by clicking

1. **“Next Stage”** &

2. **Select the packet in the list**

The screenshot shows the Microsoft Dynamics CRM interface for a user named Patrick Lovell. The decision tree is titled "CB DECISION TREE: INFORMATION" and includes fields for "Age for Assessment" (23), "LOC #", "Eligibility Status" (Not Sent), and "Notification Date". The decision tree has three stages: "Initial", "LOC", and "Eligibility Notice Tracking". The "Eligibility Notice Tracking" stage is currently active. A dropdown menu is open next to the "Next Stage" button, showing "Select Eligibility Notice Tracking" and "Patrick Lovell (6/9/2015, 12...)" with "1 Available" listed below. A red circle with the number "2" is placed over the "1 Available" text.

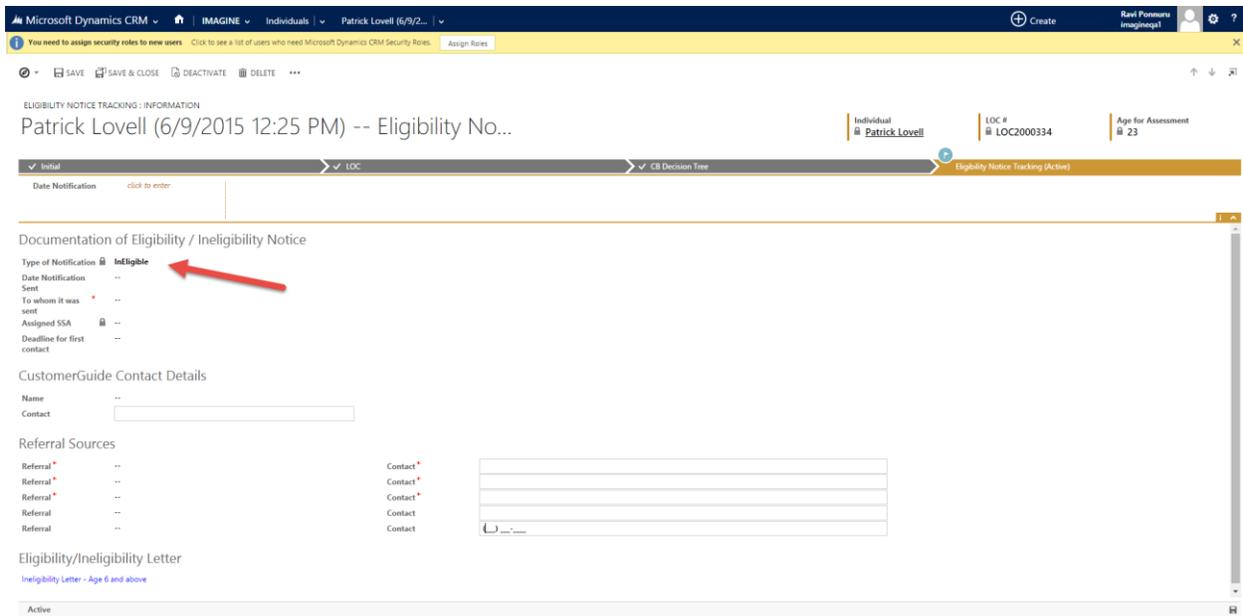
Field	Value
Date of Determination	6/8/2015
LOC Total Score	1 Substantial Functional Limitation area was identified
Is LOC Eligible	N
Total Score	8

For ages 10 and above - CB Eligibility(OPT-IN)

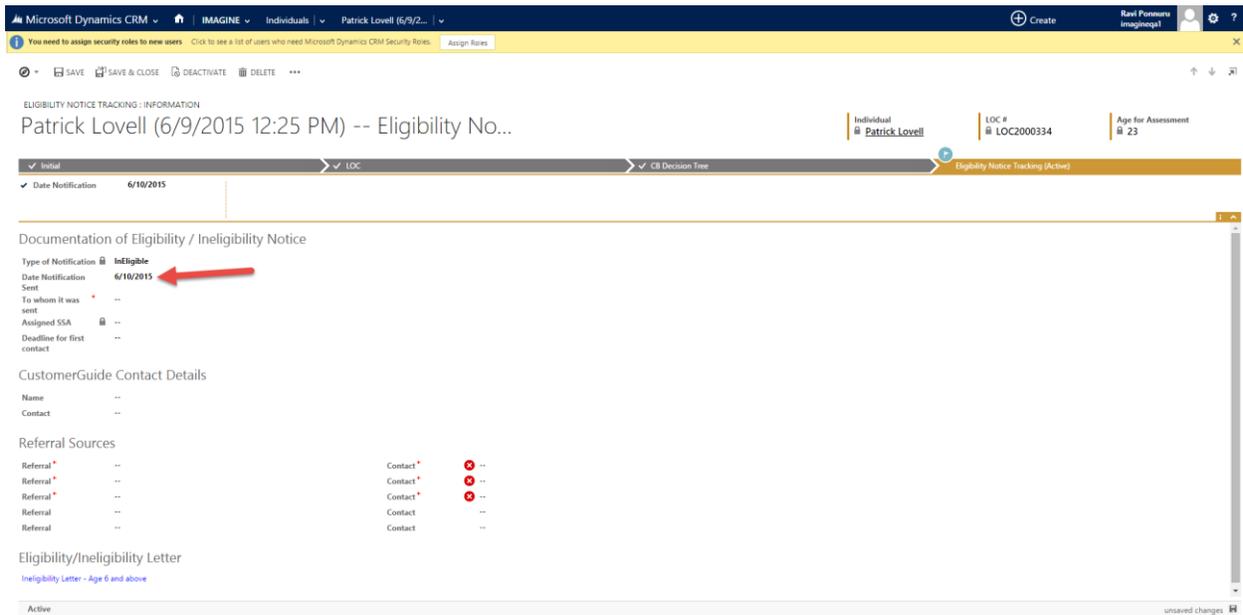
1. Does the individual have a diagnosed severe, chronic disability?
 Y
2. Is the diagnosed disability attributable to a mental or physical condition or combination of mental/physical impairments other than a sole mental health condition?
 Y
3. Was the diagnosed disability manifested before the age of 22?
 Y
4. Is the diagnosed disability likely to continue indefinitely?
 Y

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)



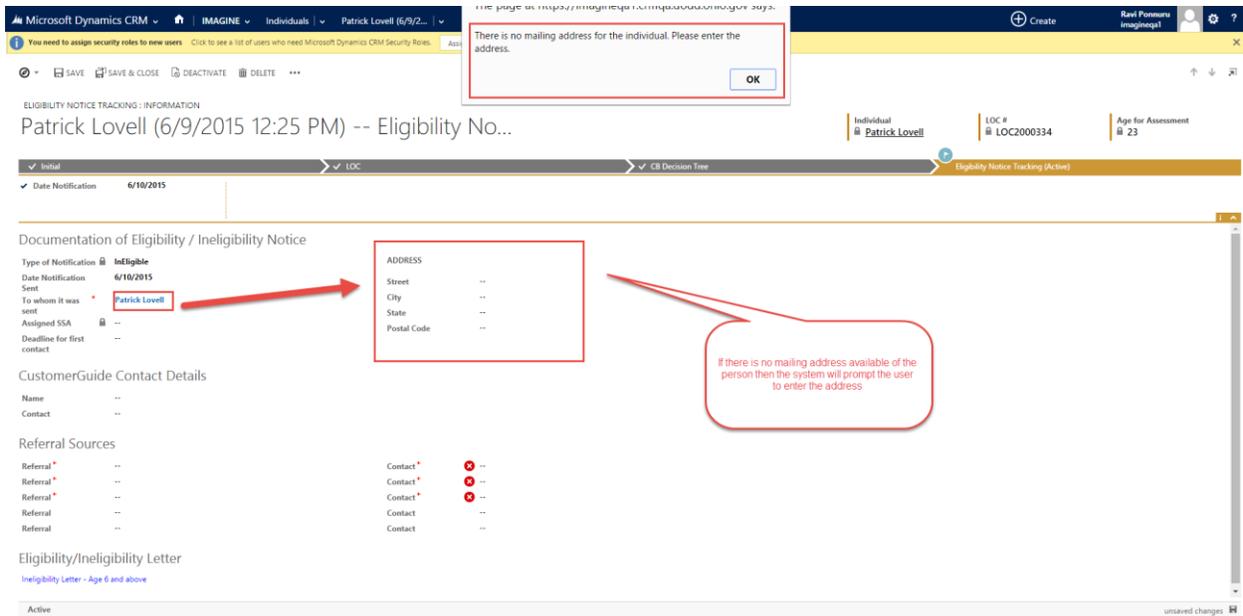


31. Enter **Date notification Sent** – date when you will send this notification to the individual. Not a required field



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.



Microsoft Dynamics CRM | IMAGINE | Individuals | Patrick Lovell (6/9/2015) | Create | Ravi Ponnuru (imagine@...)

ELIGIBILITY NOTICE TRACKING : INFORMATION
Patrick Lovell (6/9/2015 12:25 PM) -- Eligibility No...

Individual: Patrick Lovell | LOC #: LOC2000334 | Age for Assessment: 23

Initial > LOC > Eligibility Notice Tracking (Active)

Date Notification: 6/10/2015

Documentation of Eligibility / Ineligibility Notice

Type of Notification	Ineligible	ADDRESS	
Date Notification Sent	6/10/2015	Street *	30 East Broad Street
To whom it was sent	Patrick Lovell	City *	Columbus
Assigned SSA	--	State *	OH
Deadline for first contact	--	Postal Code *	43016

CustomerGuide Contact Details

Name
Contact

- 4 Category
- Advat Supanekar
- Advat Supanekar
- Amanda Spradlin
- Amber Spencer
- Andrea Otterbur
- jeff CSI jeff
- 10 results

Referral Sources

Eligibility/Ineligibility Letter - Age 6 s

Active | Unsaved changes



35. Enter Customer Guide’s contact information

Microsoft Dynamics CRM - IMAGINE - Individuals - Patrick Lovell (6/9/2015) - Create - Ravi Ponnuru imagine1

ELIGIBILITY NOTICE TRACKING : INFORMATION
Patrick Lovell (6/9/2015 12:25 PM) -- Eligibility No...

Individual: Patrick Lovell | LOC #: LOC2000334 | Age for Assessment: 23

Initial > LOC > Eligibility Notice Tracking (Active)

Date Notification: 6/10/2015

Documentation of Eligibility / Ineligibility Notice

Type of Notification	ADDRESS
Ineligible	30 East Broad Street
Date Notification: 6/10/2015	Columbus
Sent: Patrick Lovell	OH
To whom it was sent: Patrick Lovell	Postal Code: 43016
Assigned SSA: --	
Deadline for first contact: --	

CustomerGuide Contact Details

Name: Amber Spencer
Contact: (621) 221-3211

Referral Sources

Eligibility/Ineligibility Letter

Ineligibility Letter - Age 6 and above

Active | unsaved changes

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

Eligibility Notice Tracking: Samuel Davis (6/15/2015 7:49 PM) - Eligibility Notice Tracking - Internet Explorer

Microsoft Dynamics CRM - Samuel Davis (6/15/2015) - Create - g Greenec imagine1

ELIGIBILITY NOTICE TRACKING : INFORMATION
Samuel Davis (6/15/2015 7:49 PM) -- Eligibility N...

Individual: Samuel Davis | LOC #: -- | Age for Assessment: 24

Initial > Eligibility Notice Tracking (Active)

Date Notification: 6/15/2015

Documentation of Eligibility / Ineligibility Notice

Type of Notification	ADDRESS
Eligible	30 East Broad Street
Date Notification: 6/15/2015	Dublin
Sent: Samuel Davis	OH
To whom it was sent: Samuel Davis	Postal Code: 43230
Assigned SSA: --	
Deadline for first contact: --	

CustomerGuide Contact Details

Name: Greenec
Contact: (614) 324-2222

Eligibility/Ineligibility Letter

Eligibility Letter - Age 6 and above

Click on this link to create/open a Eligibility Letter for filing/mailing purposes.

Active | unsaved changes | 100%

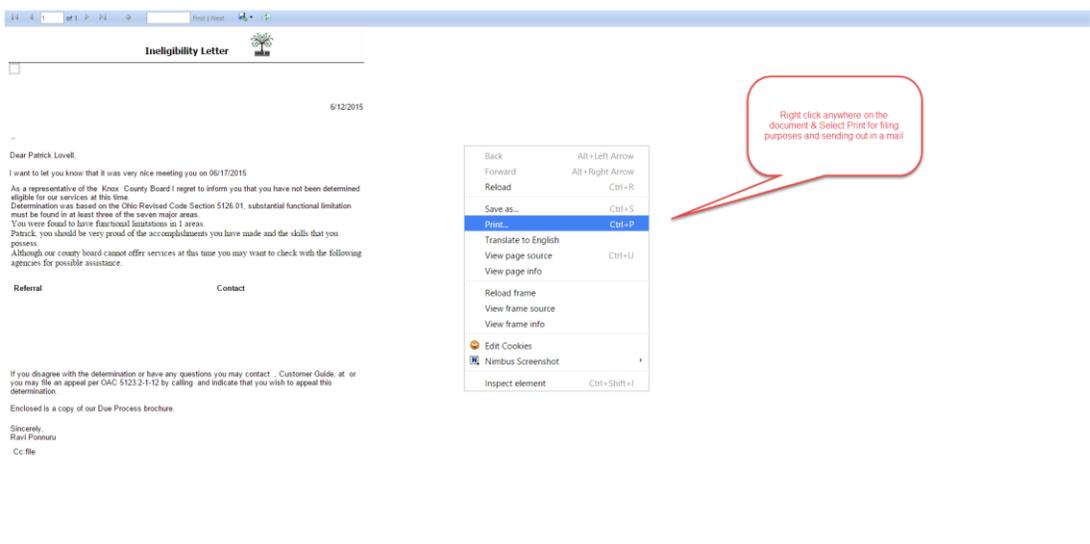


37. Eligible/Ineligible Notice will open in a new tab



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

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

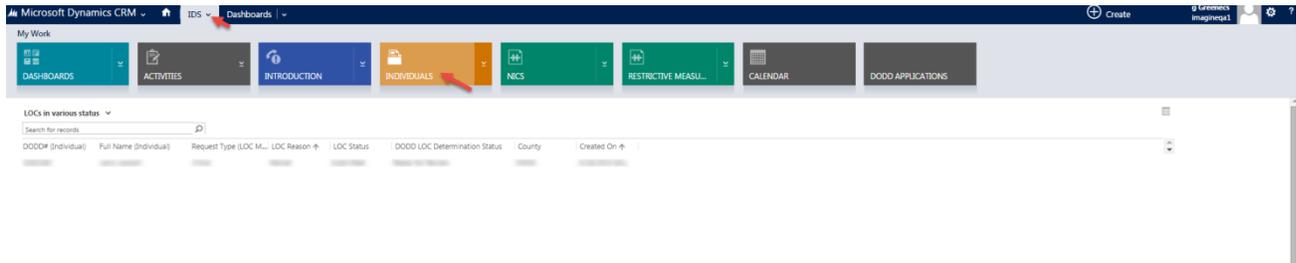


You just completed the County Board eligibility for 10 and above individual as an opt in county.

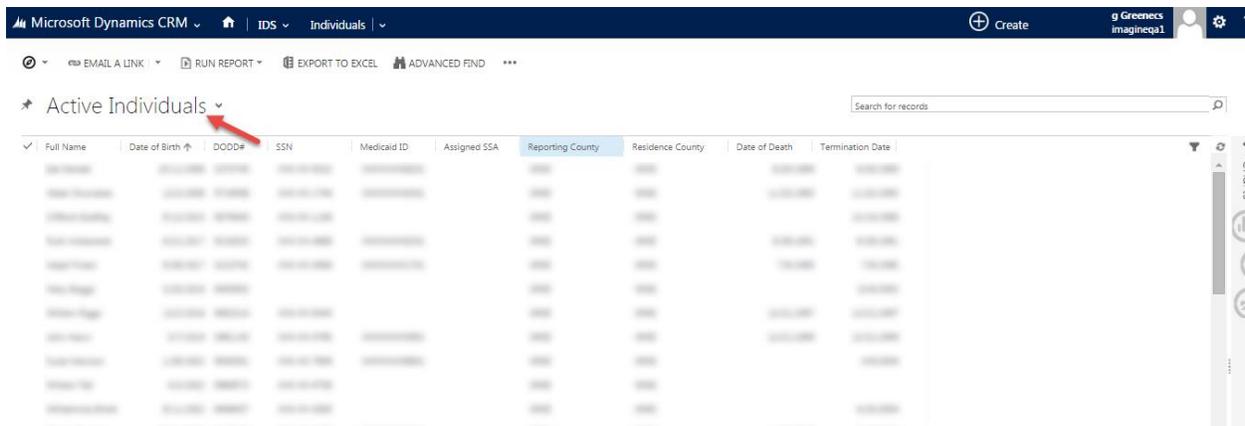


LOC for Waiver Eligibility

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**



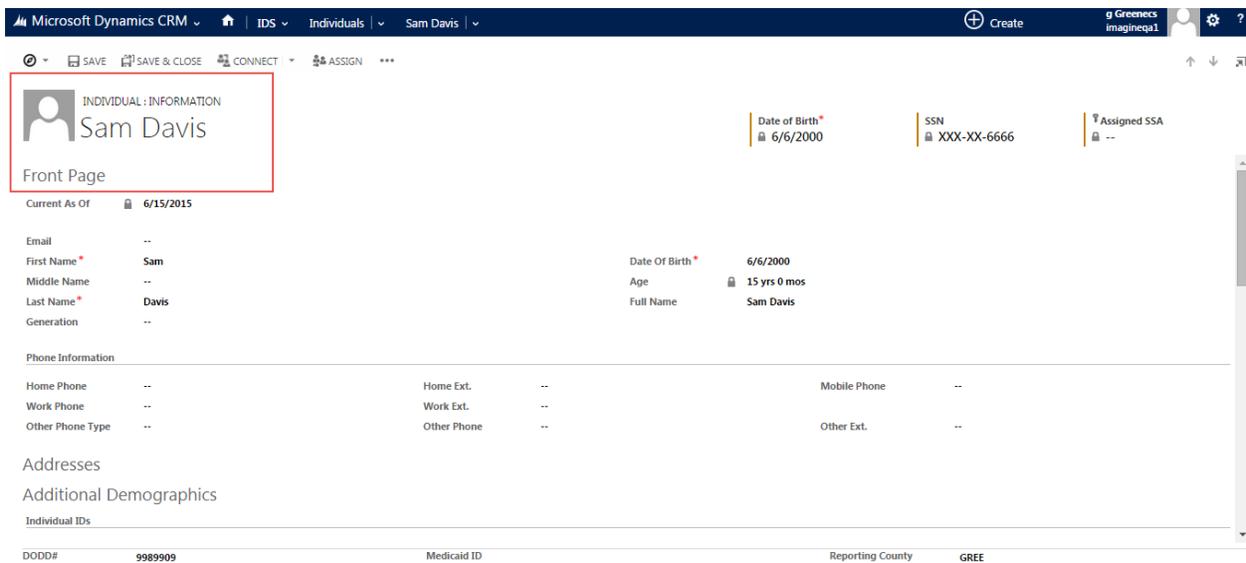
3. **Search for individual** by typing name in search box
4. Hit **Enter** or click on the magnifying glass next to search box
5. **Individual record will show up** if individual exist in your county



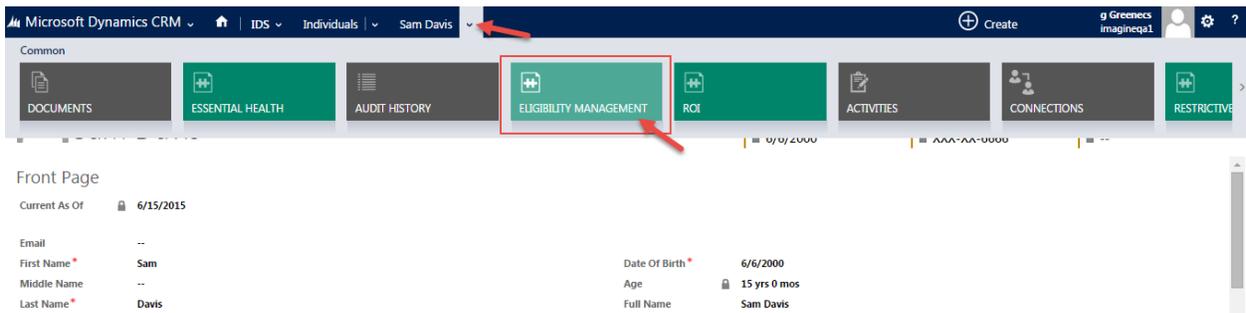


6. Double click on individual record to open individual's record

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

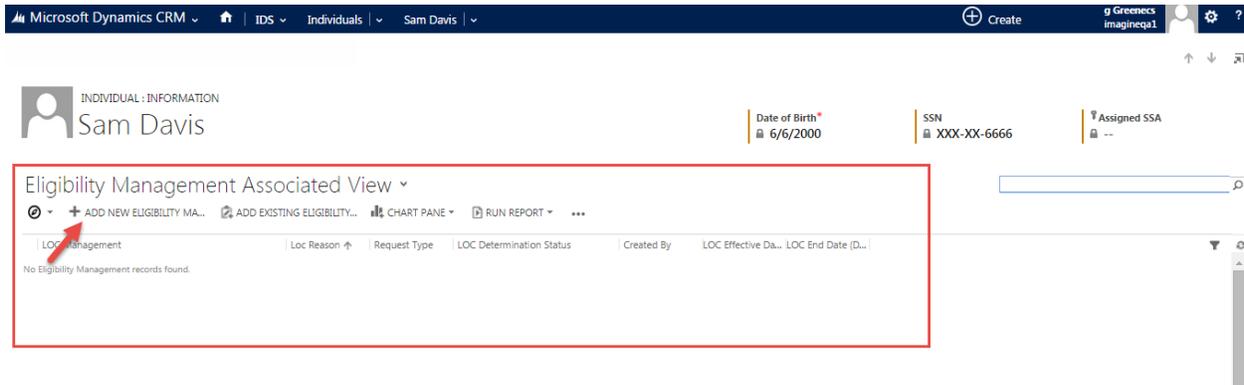


8. Start Eligibility Process - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual's name



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 imagineqa1

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

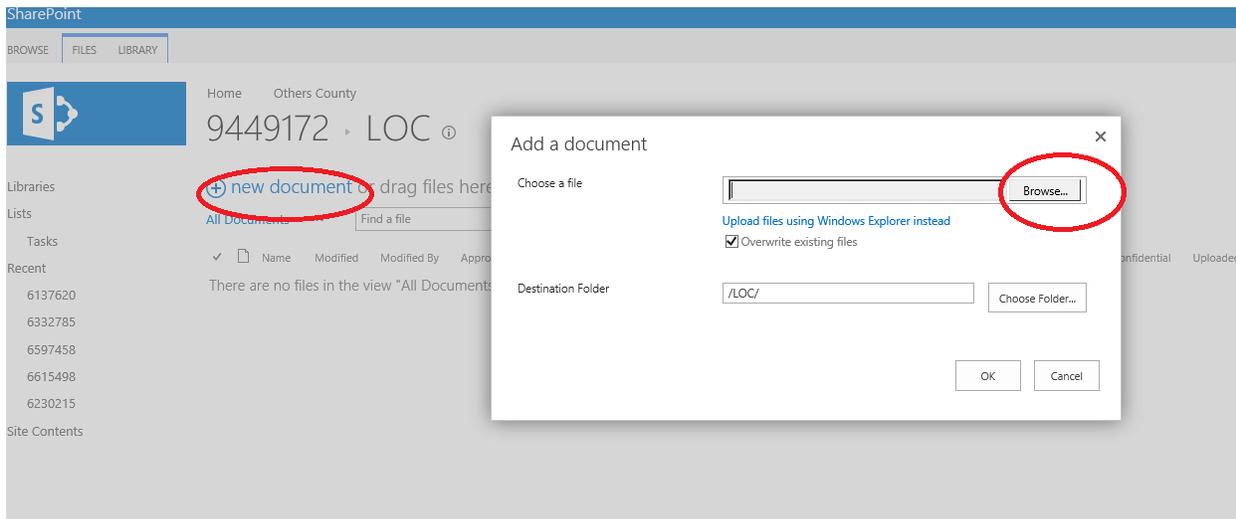
Assessment Reason	Waiver 1	Assigned Eligibility Specialist	--
Request Type	Initial 2	Waiver Type	IO 5
Assigned Evaluator	g Greenecs 3	Best way to communicate(Preferred Method)	--
Assessment Date (Scheduled/Rescheduled)	6/10/2015 4	Age for Assessment	15
LOC Status	Not Started	Proposed Effective Date	--
Location for Initial Visit	--	LOC Effective Start Date	--
Location Address	<input type="text"/>	LOC Effective End Date	--
Date of Visit	--		

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	--

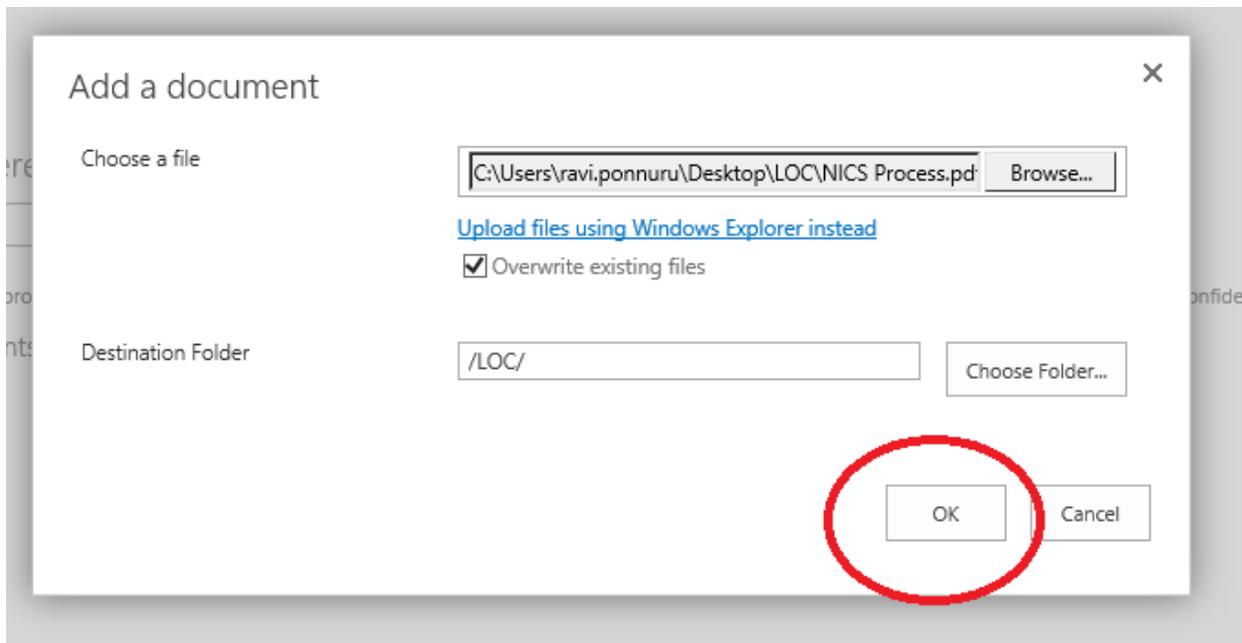


12. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document to SharePoint**
 1. Click on **+new document**
 2. Click on **chose file**



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**



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



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' and the 'LOC Reason' is 'Waiver'. The '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'.



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

15. User will now be on the LOC tool



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 a 'Create' button. 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 several sections:

- General:** Contains fields for 'LOC Type' (Initial), 'Assessment Reason' (Waiver), 'LOC Status' (Not Started), 'Assigned Evaluator' (g Greenecs), 'Waiver Type' (IO), 'Proposed Effective Date' (empty), 'Date of Assessment' (6/15/2015), 'Document(s) Reviewed' (empty), 'Location of Assessment' (empty), and 'Age Used for Assessment' (15). Red arrows point to the lock icons on 'Initial', 'Waiver', 'Not Started', 'IO', '6/15/2015', and '15'.
- INDIVIDUAL DETAILS:** A separate box containing 'Full Name' (Sam Davis), 'Date of Birth' (6/6/2000), 'SSN' (XXX-XX-6666), and 'Medicaid ID' (empty).

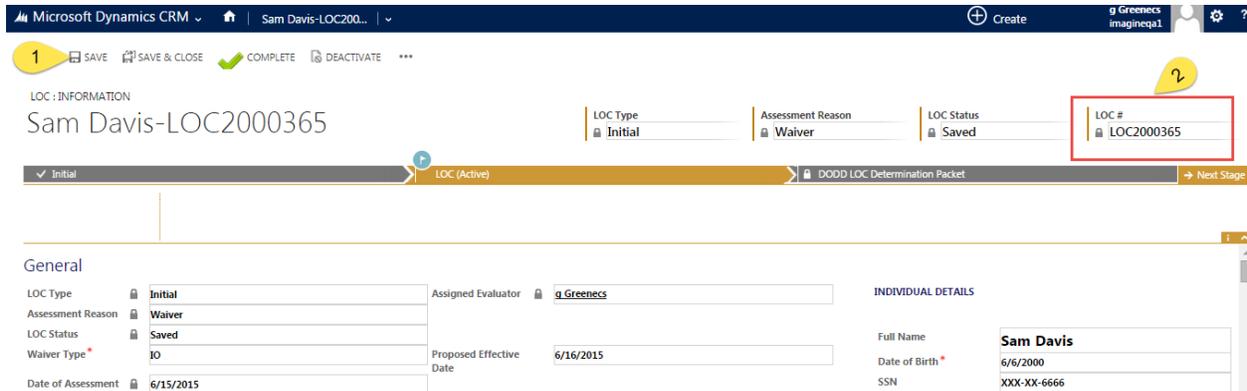
17. All fields on LOC are REQUIRED to complete LOC

18. Enter the General information on LOC

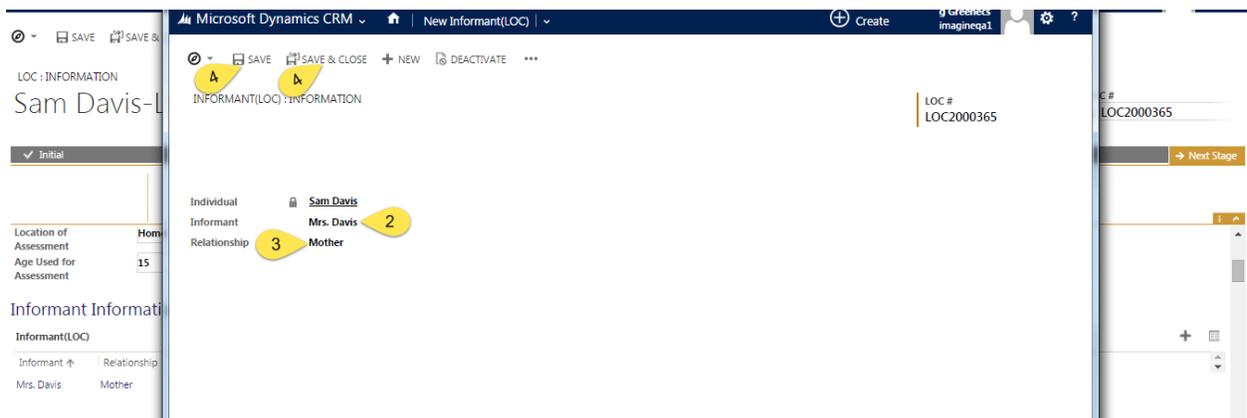
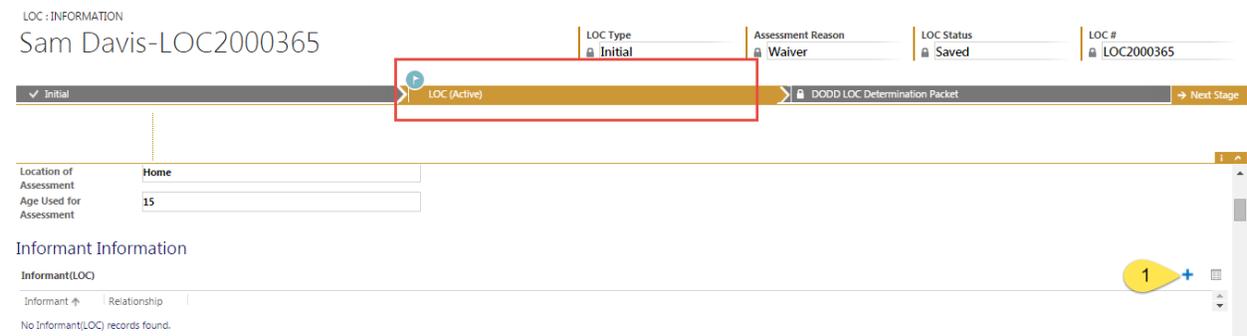
This screenshot shows the same 'New LOC' form, but with red arrows pointing to fields that are now editable. The 'Proposed Effective Date' field now contains '6/16/2015'. The 'Document(s) Reviewed' field contains 'Verification document'. The 'Location of Assessment' field contains 'Home'. The 'Age Used for Assessment' field still contains '15'. The 'INDIVIDUAL DETAILS' section remains the same as in the previous screenshot.



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



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



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)	Relationship
Mrs. Davis	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

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.)

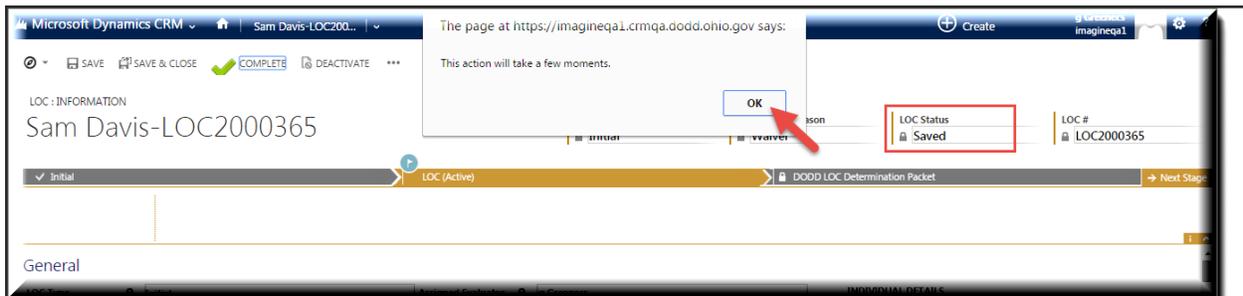
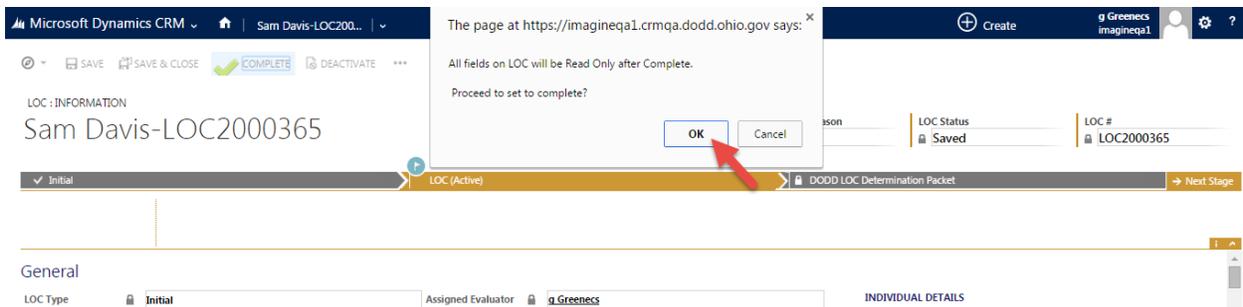
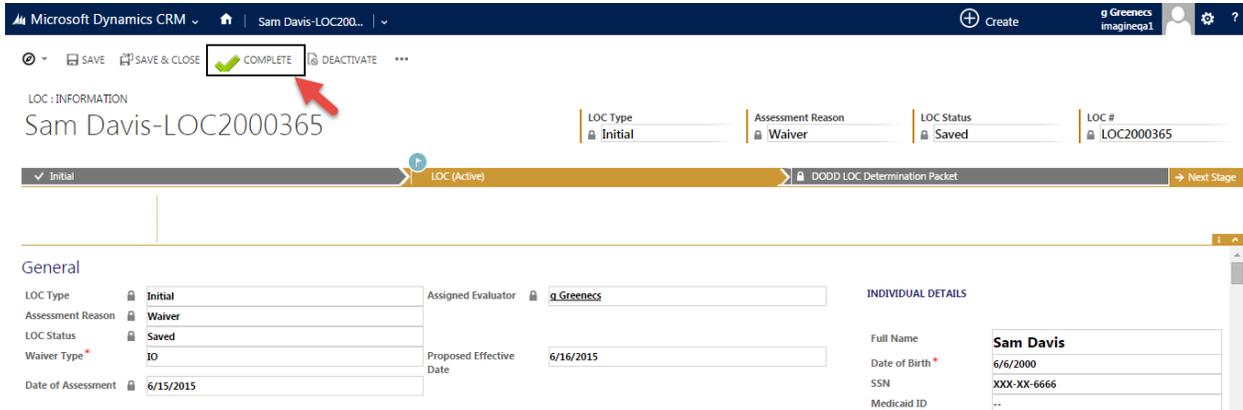
* Please select one - - - - -
Independently - Completes task safely, consistently, without undue effort, and in a reasonable amount of time with independence with the use of assistive devices/equipment, including devices/equipment for initial prompting or re-prompting to initiate or assistance to set-up from another person

* With the assistance of another person to complete the task

6. The individual is able to apply deodorant



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 | Full Name: Sam Davis

LOC Status: Completed | Date of Birth: 6/6/2000

Waiver Type: JO | Proposed Effective Date: 6/16/2015 | SSN: XXX-XX-6666

Date of Assessment: 6/15/2015 | Medicaid ID: ..

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

Location of Assessment: Home

Age Used for Assessment: 15

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



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-LOC200... | Create | Greenics 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 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-LOC200... | Create | Greenics 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

Attestation/Recommendation

LOC Reason	Recommendation	Attestation2399	AttestationPICT	AttestationICF	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) | Create | g Greenecs imagineq1

SAVE | SAVE & CLOSE | DEACTIVATE | HOSKY'S GUID GETTER

ATTESTATIONS/RECOMMENDATIONS : INFORMATION

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 **Electronic signature by logged in user**



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.

Microsoft Dynamics CRM | Sam Davis (6/15/2015 6:42 PM) -- Att... | Create | g Greenecs imagineq1

SAVE | SAVE & CLOSE | DEACTIVATE | HOSKIS GUID GETTER

ATTESTATIONS/RECOMMENDATIONS : INFORMATION
 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:

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

I am a person who coordinates or performs evaluations of individuals to make a recommendation to the department as to 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

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”.

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

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) | DOOD LOC Determination Packet | Next Stage

LOC Notes

ACTIVITIES | **NOTES** 1

Enter a note

No Notes found.



Enter notes and click on DONE

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

LOC : INFORMATION
Sam Davis-LOC200365

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 your note

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-LOC200365 | Create | g Greenecs imagineq1

LOC : INFORMATION
Sam Davis-LOC200365

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-LOC200365 | Create | g Greenecs imagineq1

LOC : INFORMATION
Sam Davis-LOC200365

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 | g.Greenecs imagineqa1

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	g.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

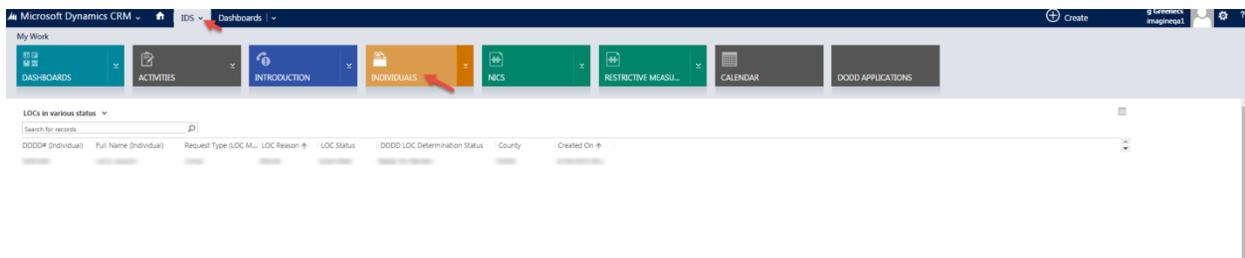
You have successfully submitted the LOC to DODD; once DODD has processed the LOC, you will receive an alert for status updates and/or approval.



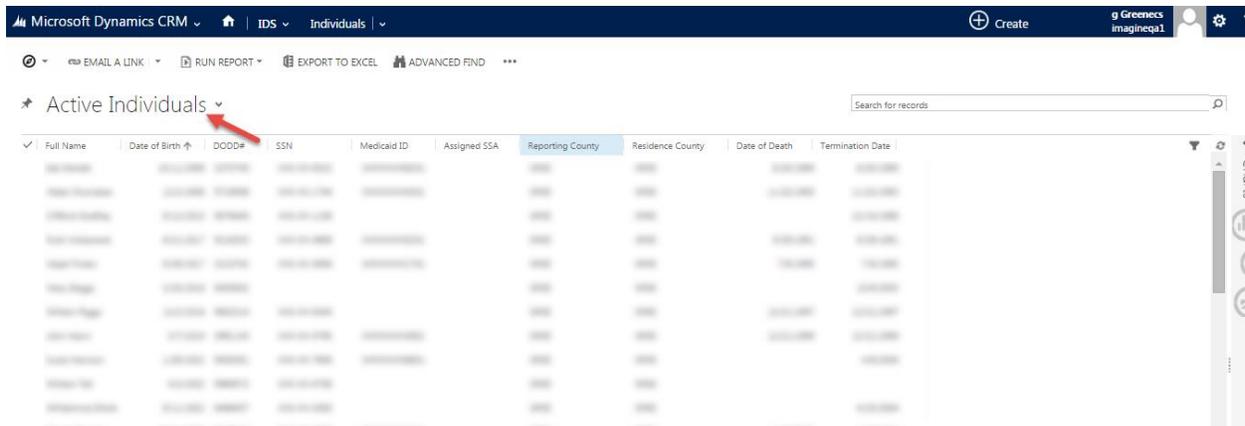
Waiver NICS (Notification of Individual's Change in Status)

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**



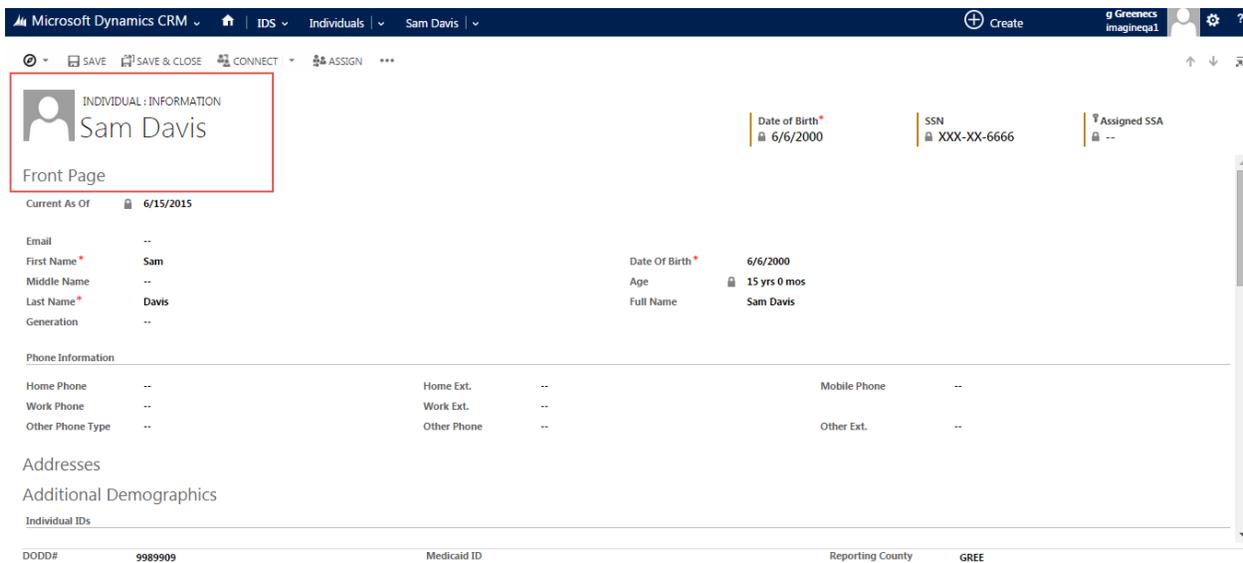
3. **Search for individual** by typing name in search box
4. Hit **Enter** or click on the magnifying glass next to search box
5. **Individual record will show up** if individual exist in your county



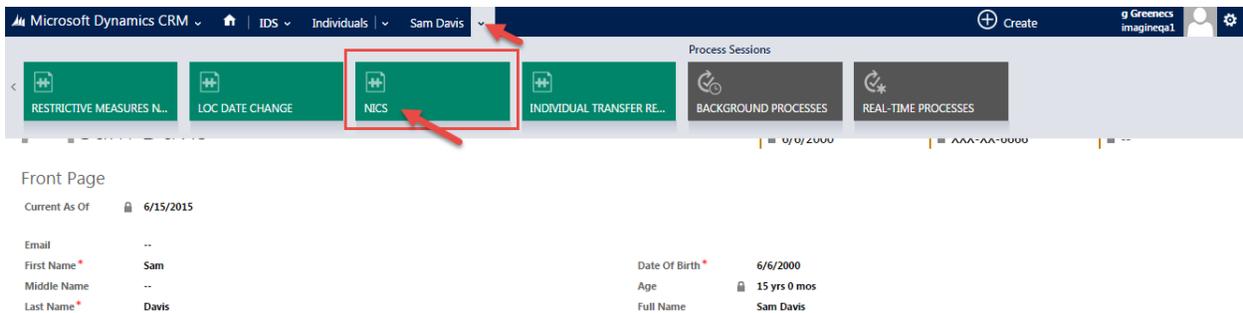


6. Double click on individual record to open individual’s record

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

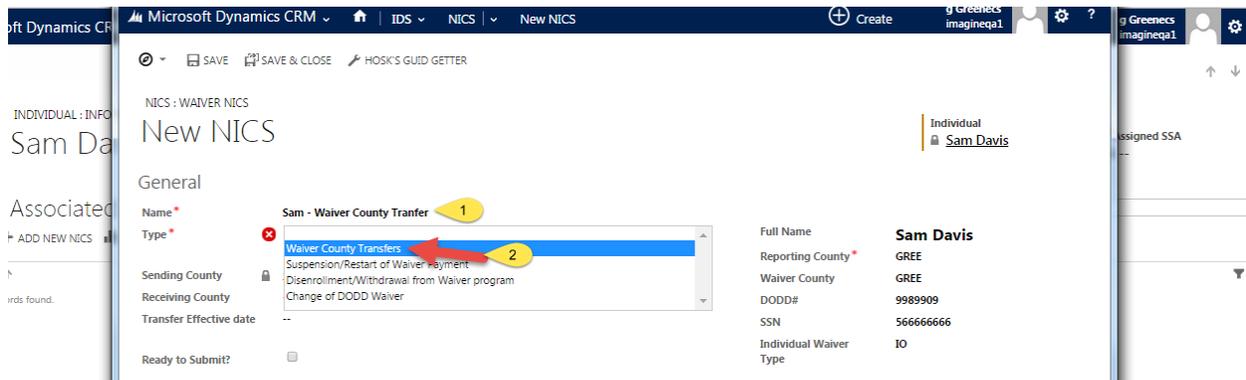


10. Add New NICS



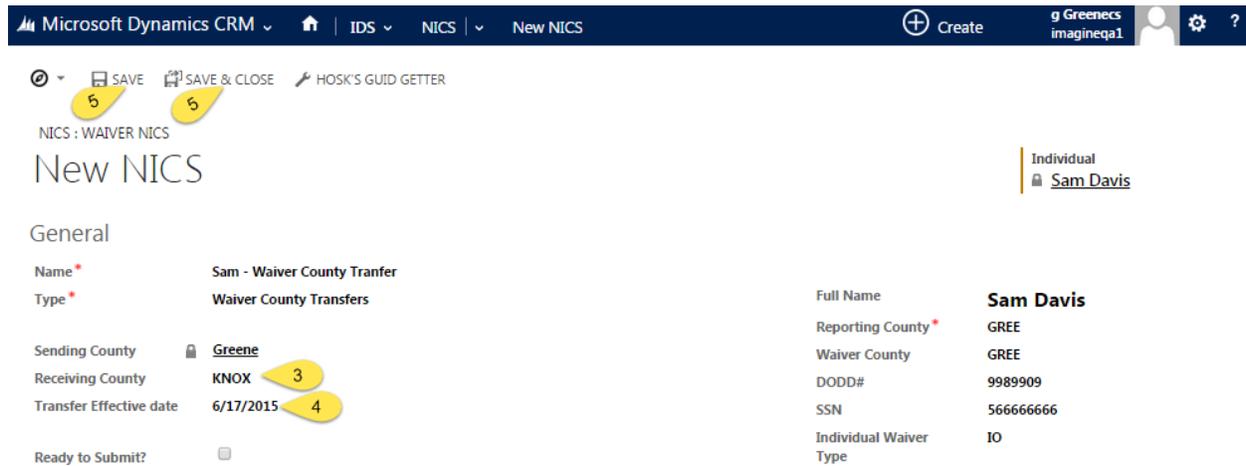
11. Add a Name for your NICS

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 imagineqa1

SAVE SAVE & CLOSE HOSK'S GUID GETTER

NICS : WAIVER NICS
Sam - Waiver County Transfer

Individual
 Sam Davis

General

Name* **Sam - Waiver County Tranfer**
 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 imagineqa1

SAVE SAVE & CLOSE HOSK'S GUID GETTER

NICS : WAIVER NICS
New NICS

Individual
 Sam Davis

General

Name* **Sam - Waiver County Tranfer**
 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

SAVE | SAVE & CLOSE | HOSK'S GUID GETTER

NICS : WAIVER NICS

Sam - Waiver County Transfer

Individual | Sam Davis

General

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

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

Ready to Submit? 6

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

17. NICS Submitted to DODD

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

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

SAVE | SAVE & CLOSE | HOSK'S GUID GETTER

NICS : WAIVER NICS

Sam - Waiver County Transfer

Individual | Sam Davis

General

Name * Sam - Waiver County Tranfer
 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 56666666
 Individual Waiver Type IO

NICS request has been submitted!

OK

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' tab is active, showing the following details:

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	56666666
Waiver NICS Status	Ready to Review	Individual Waiver Type	IO

An orange callout box points to the 'Ready to Review' status with the text: 'Ready to Review for DODD'. The top navigation bar includes 'Microsoft Dynamics CRM', 'IDS', 'NICS', and 'Sam - Waiver Count...'. The right side shows the user 'g Greenecns imagineq1' and a 'Create' button.

You successfully submitted a Waiver NICS to DODD



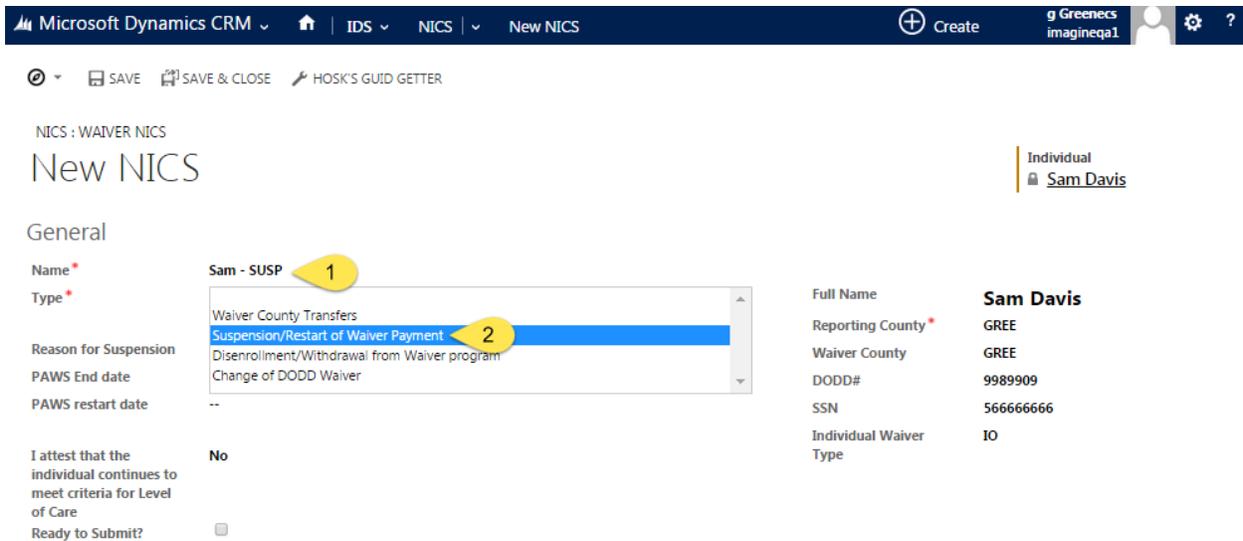
Suspension/Restart of Waiver Program NICS

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 | 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 3
PAWS End date 6/17/2015 4
PAWS restart date 6/20/2015 5

I attest that the individual continues to meet criteria for Level of Care
No
Yes 6

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

Ready to Submit?

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

Microsoft Dynamics CRM | 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? 8

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



7. NICS Submitted to DODD

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

NICS request has been submitted!

OK

Microsoft Dynamics CRM | ID | Create | g Greenecs imagineqa1

NICS : WAIVER NICS
Sam - SUSP

Individual
Sam Davis

General

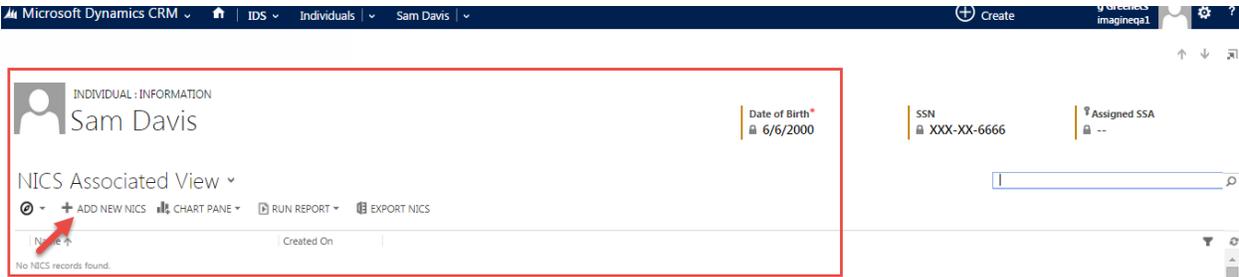
Name*	Sam - SUSP	Full Name	Sam Davis
Type*	Suspension/Restart of Waiver Payment	Reporting County*	GREE
Reason for Suspension*	Hospital	Waiver County	GREE
PAWS End date	6/17/2015	DODD#	9989909
PAWS restart date	6/20/2015	SSN	566666666
I attest that the individual continues to meet criteria for Level of 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.**



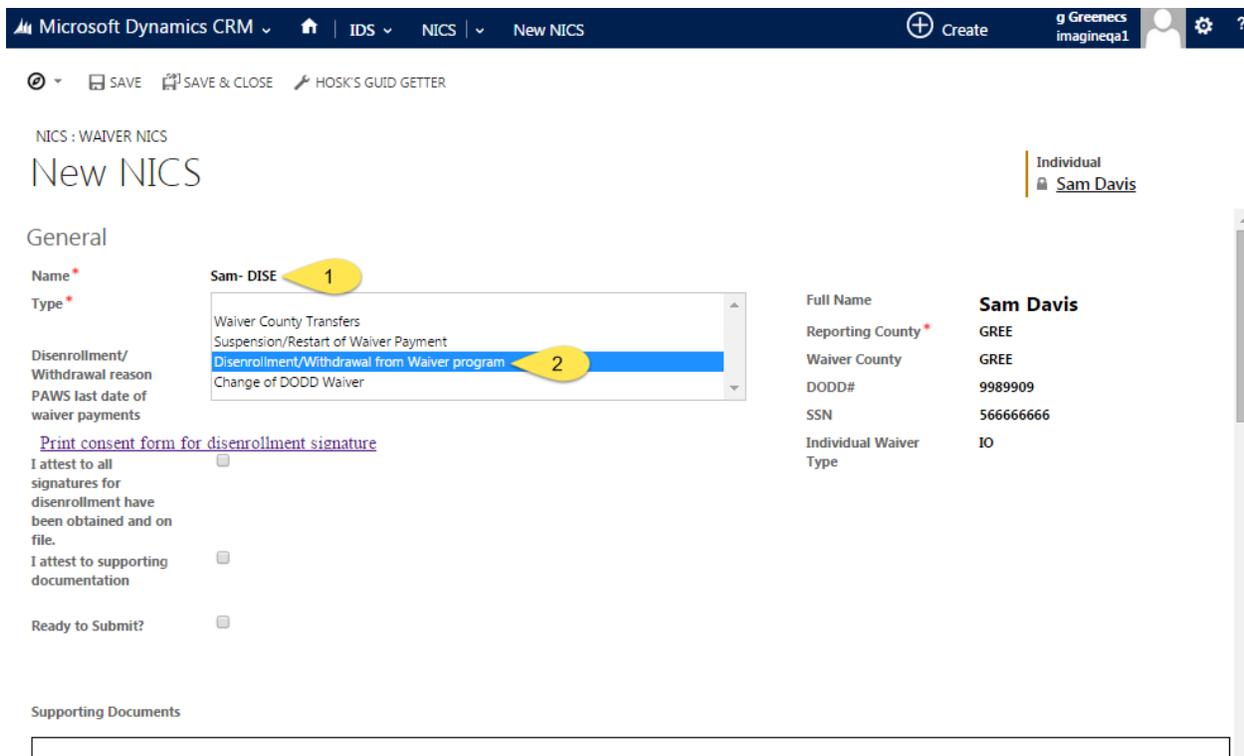
Disenrollment/Withdrawal Waiver Program NICS

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

Sam- DISE

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

Sam- DISE

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

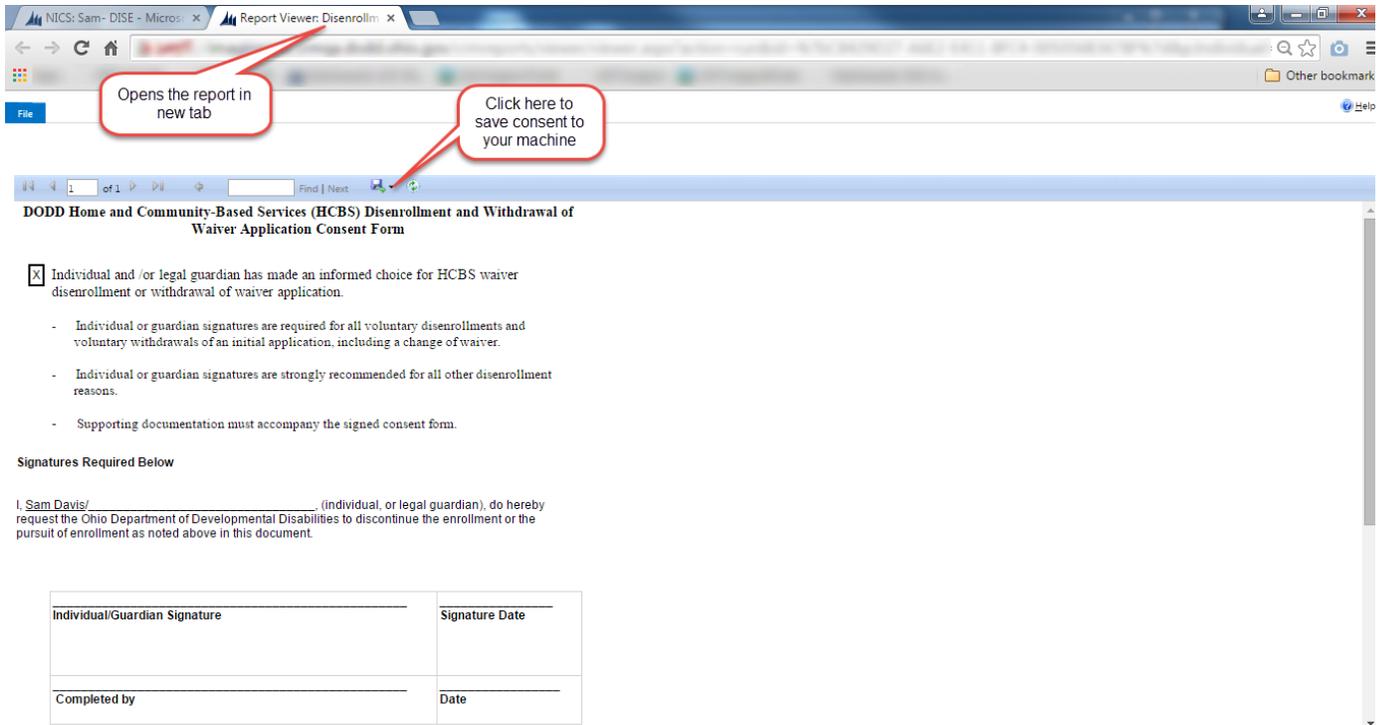
[Print consent form for disenrollment signature](#)
I attest to all signatures for disenrollment have been obtained and on file.
I attest to supporting documentation

Ready to Submit?

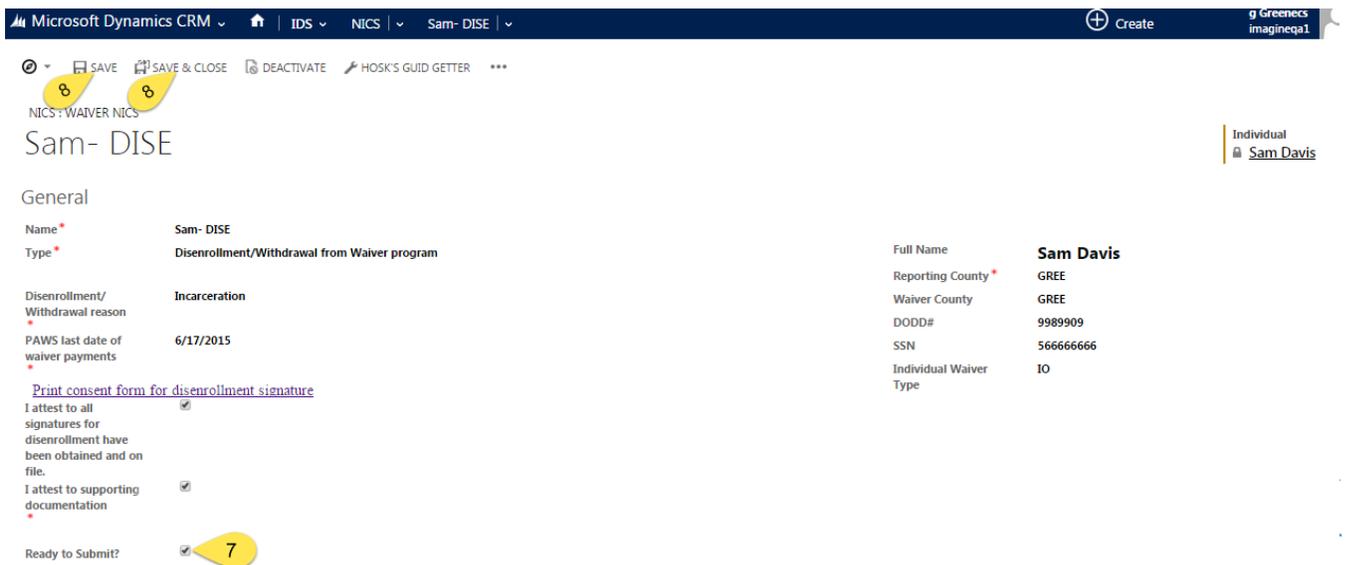
Full Name **Sam Davis**
Reporting County* GREE
Waiver County GREE
DODD# 9989909
SSN 566666666
Individual Waiver Type IO

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

The screenshot shows the Microsoft Dynamics CRM interface for a NICS record. The record is titled 'NICS : WAIVER NICS' and 'Sam- DISE'. The user is identified as 'Individual Sam Davis'. The 'General' section contains the following fields:

- Name: Sam- DISE
- Type: Disenrollment/Withdrawal from Waiver program
- Disenrollment/Withdrawal reason: Incarceration
- PAWS last date of waiver payments: 6/17/2015
- Waiver NICS Status: Ready to Review

Additional information on the right side of the record includes:

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

A callout box points to the 'Waiver NICS Status' field, stating: 'Submitted NICS is Ready to Review for DODD'.

You successfully submitted a Waiver NICS to DODD



Change of DODD Waiver NICS

1. Add New NICS

Microsoft Dynamics CRM | IDS | Individuals | Sam Davis | Create

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

NICS Associated View
+ ADD NEW NICS | CHART PANE | RUN REPORT | EXPORT NICS

No NICS records found.

2. Add a Name for your NICS

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

Microsoft Dynamics CRM | IDS | NICS | New NICS | Create

INDIVIDUAL : INFO
Sam Davis

NICS : WAIVER NICS
New NICS

General
Name* Sam - Waiver Change 1
Type* Change of DODD Waiver 2
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?

Individual Sam Davis
Full Name Sam Davis
Reporting County GREE
Waiver County GREE
DODD# 9989909
SSN 56666666
Individual Waiver Type 10

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

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 | Home | IDS | NICS | Sam - Waiver Change | Create | g Greenecs imagineqa1

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 | Home | IDS | NICS | Sam - Waiver Change | Create | g Greenecs imagineqa1

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 type="lock"/> Ready to Review		

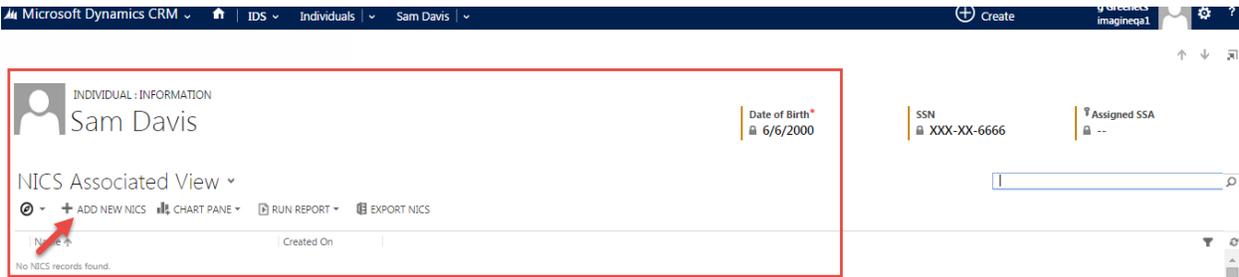
Submitted NICS is Ready to Review for DODD

You successfully submitted a Waiver NICS to DODD



ICF to Waiver NICS

1. Add New NICS

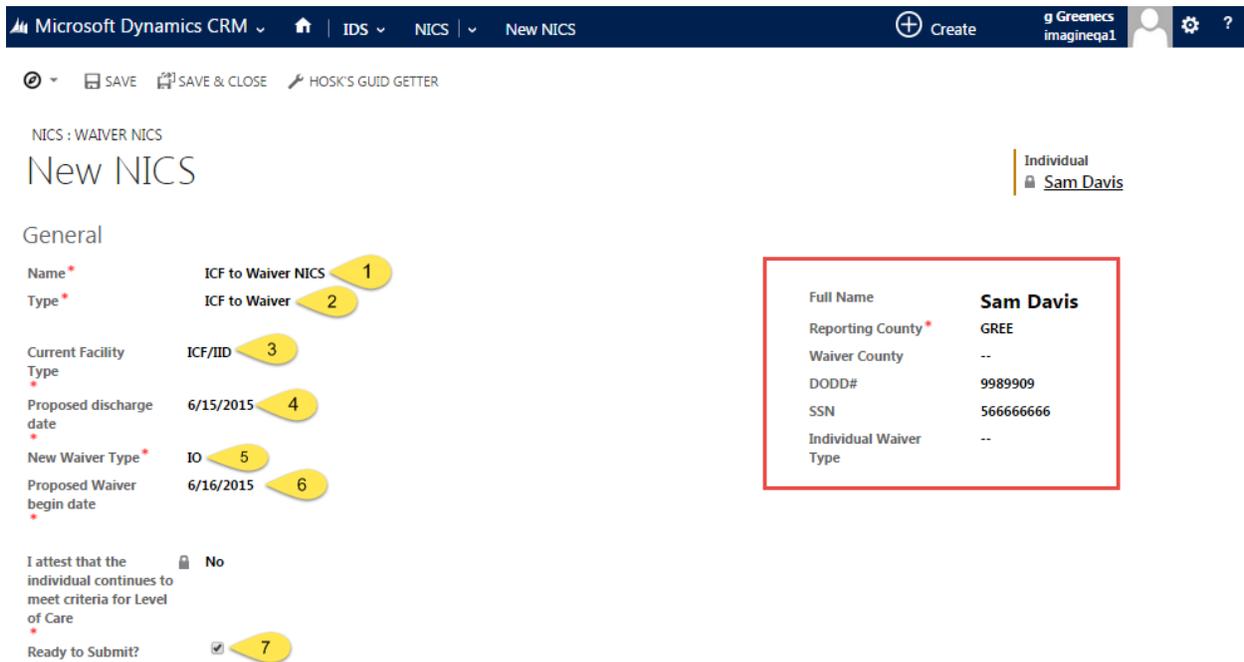


2. Add a Name for your NICS

3. Select Type of NICS = ICF to Waiver

4. Enter all Required Information

5. Save at any time



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 | g Greenecs imagineqa1

INDIVIDUAL : INFORMATION
 Sam Davis

Date of Birth: 6/6/2000 | SSN: XXX-XX-6666 | Assigned SSA: --

NICS Associated View

Search for records

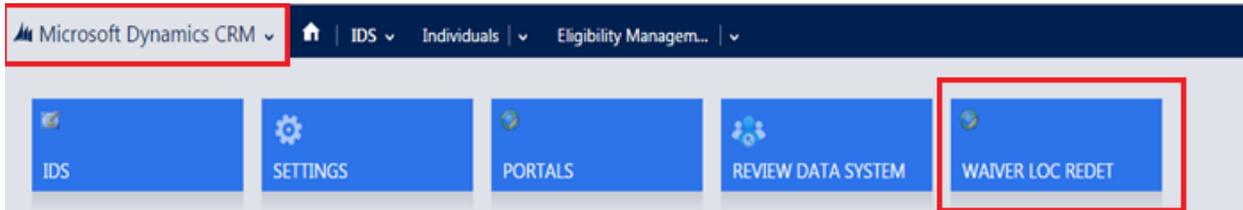
Name	Created On
Sam - SUSP	6/17/2015 2:59 PM
Sam - Waiver Change	6/17/2015 8:20 PM
Sam - Waiver County Tranfer	6/17/2015 2:29 PM
Sam - Waiver County Tranfer	6/17/2015 2:32 PM
Sam- DISE	6/17/2015 3:21 PM

List of submitted NICS for this individual

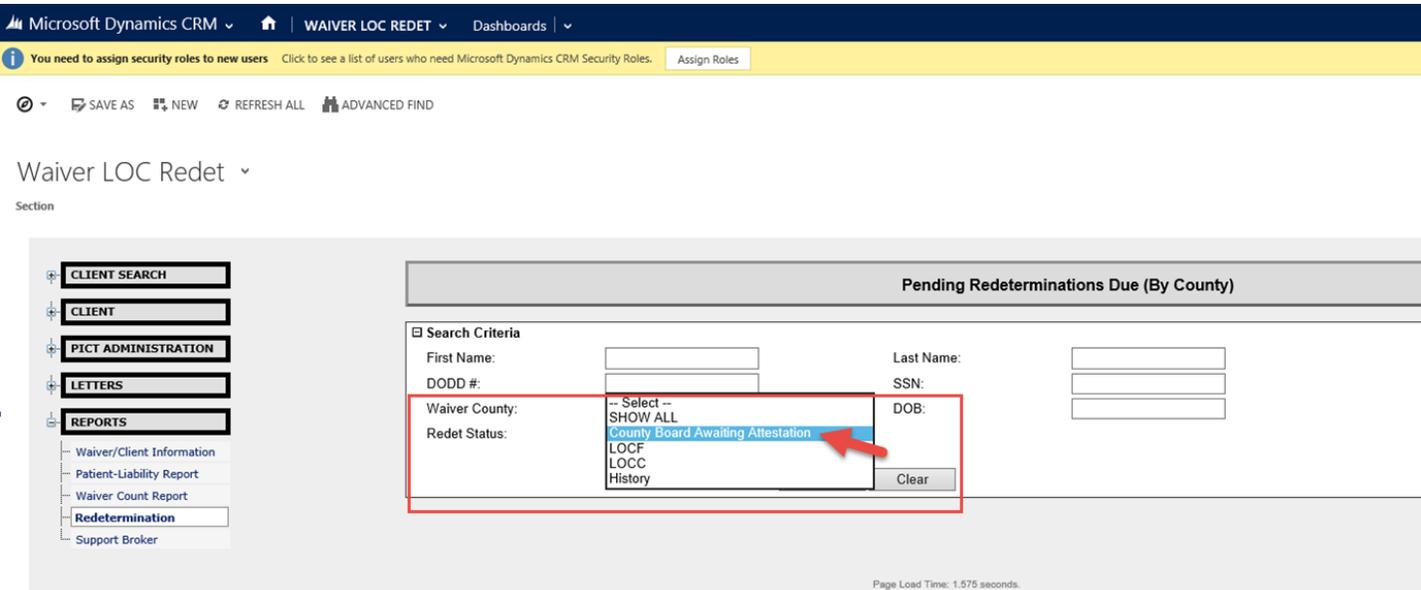


Waiver Redeterminations for LOC

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 whole 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.

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.



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**

<input type="checkbox"/>	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.**

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**

<input type="checkbox"/>	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

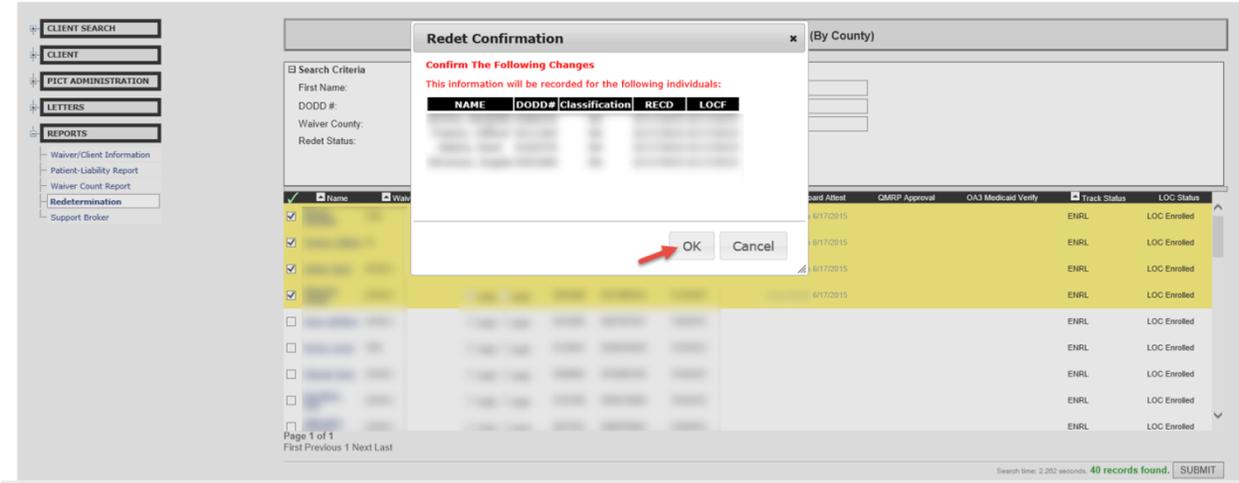
Search time: 2.292 seconds: **40 records found.**



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.

