User Guide for CRM – IDS & LOC

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

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7/1/2015

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

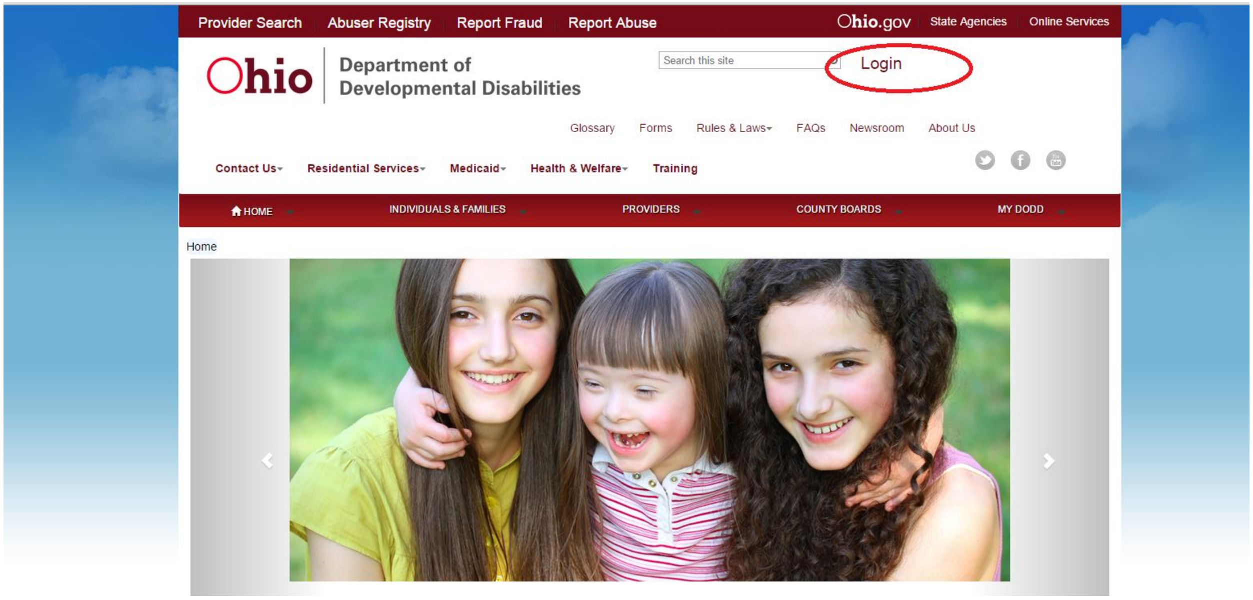
Disclaimer - All data in this document is fictitious and/or redacted

County Boards Roles

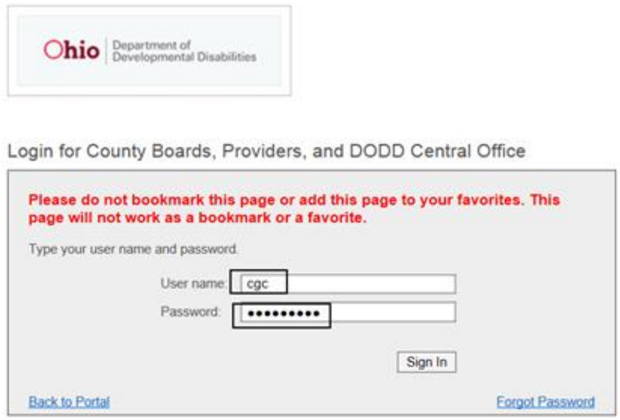
1. Customer Service Guide - CSG (IDS Create)

Login

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



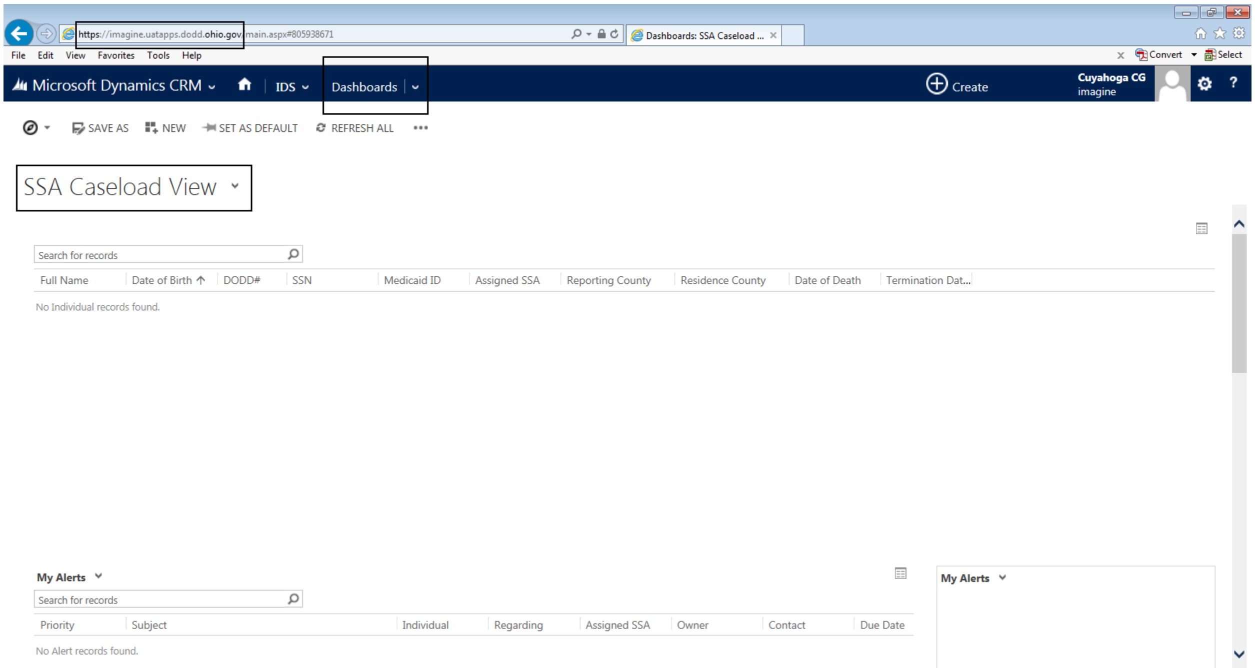
3. **Enter** your **User Name** and **Password**
   (Role: Customer Guide)



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**

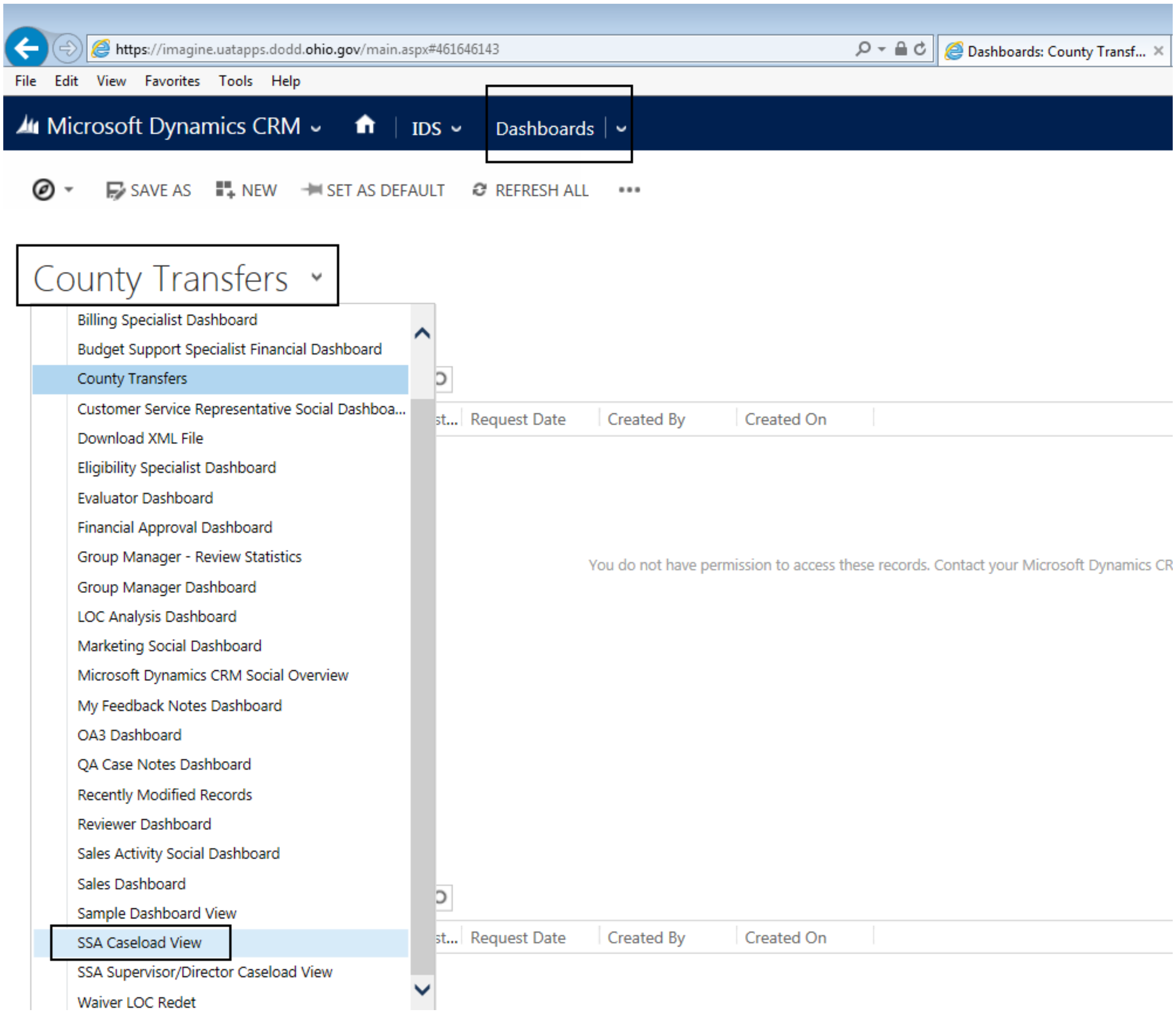


6. If you don't see the SSA Caseload View:

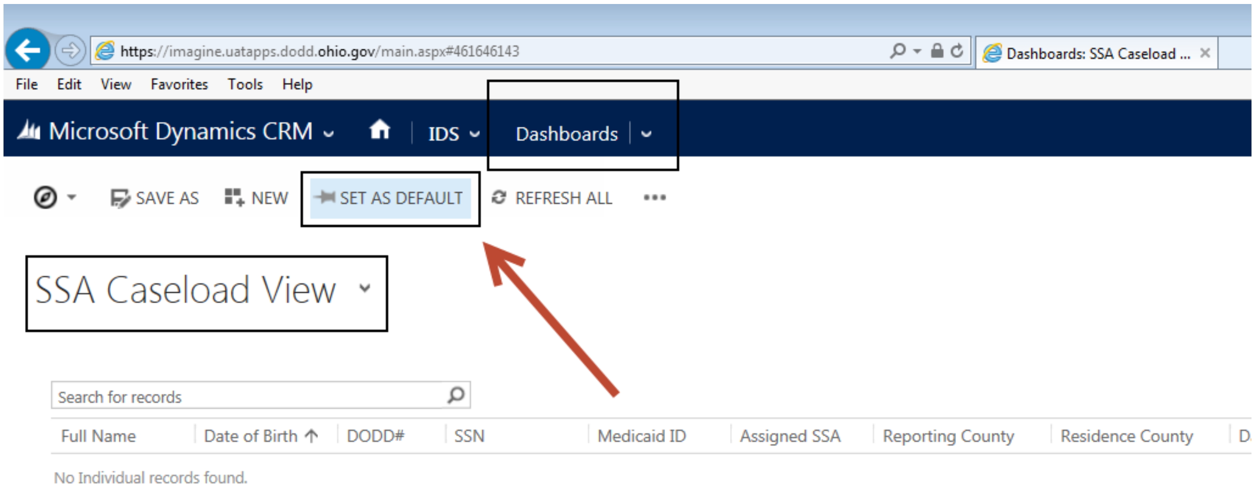
a) Click on the dropdown arrow next to the currently selected view.

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.



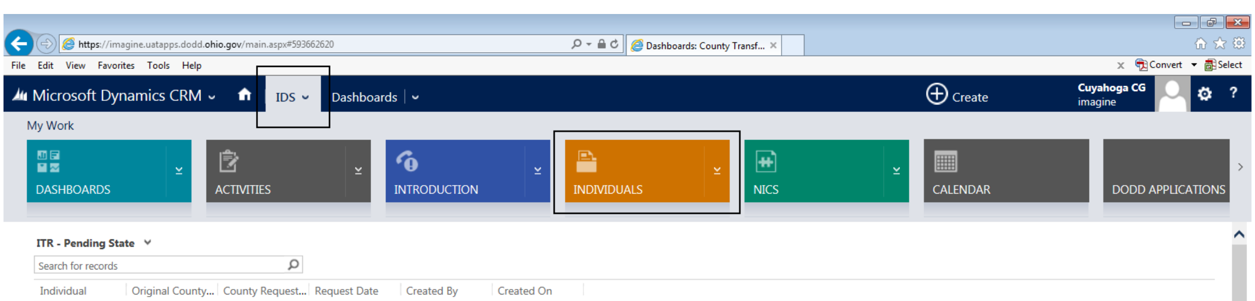
d) Finally, click on "Set as Default" on top of this dashboard page if you wish to pin this as your **Home** landing page.



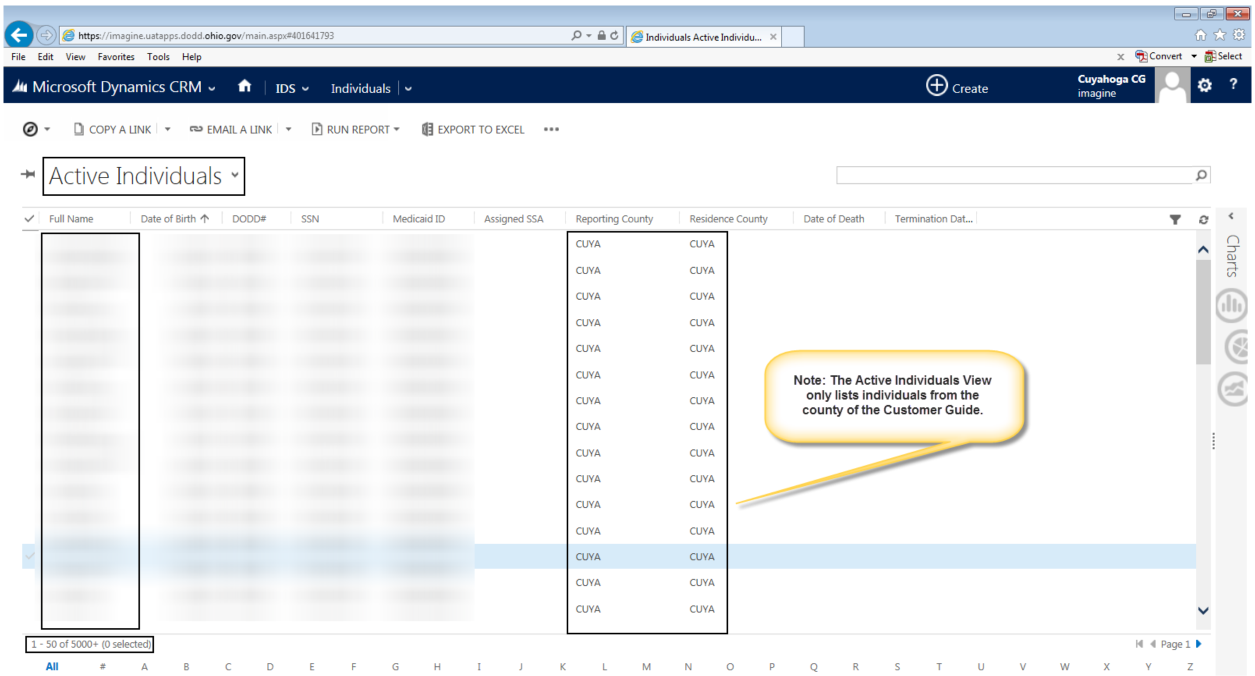
Access Individual

7. To access list of individuals in your county:

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



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



Search Individual

8. **Follow these steps to Individual Search**

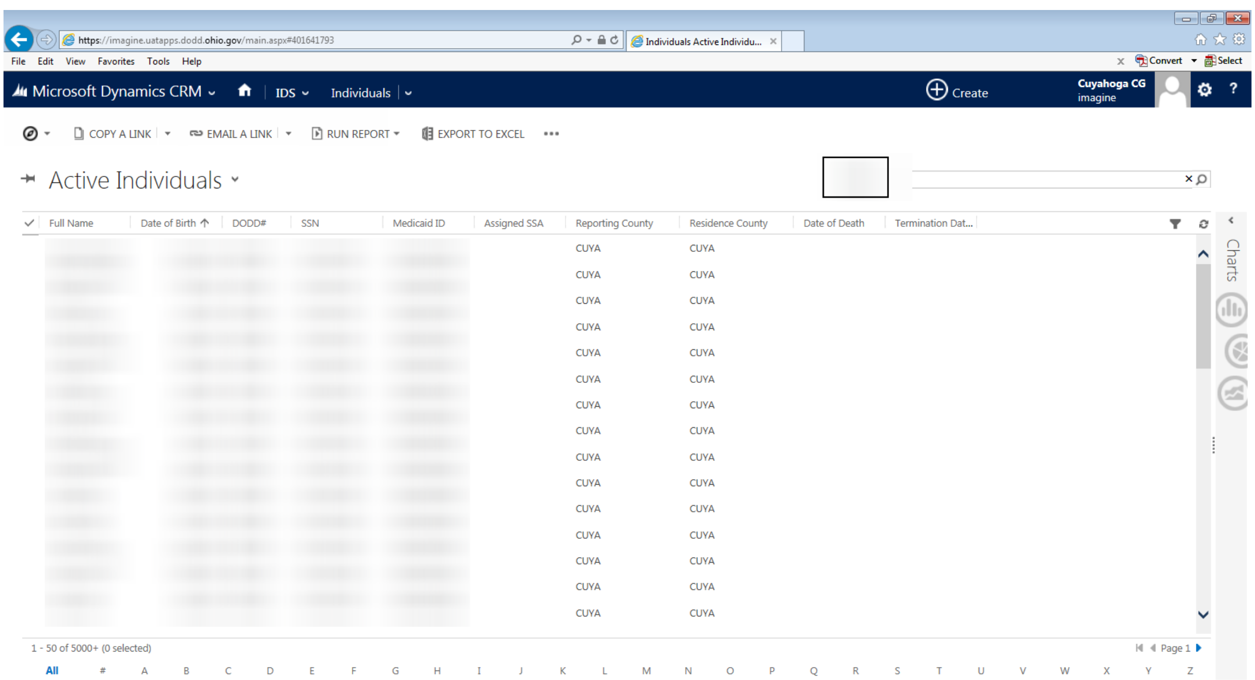
I. Search for individual by entering search criteria in the search box. Fields available to search on include: First

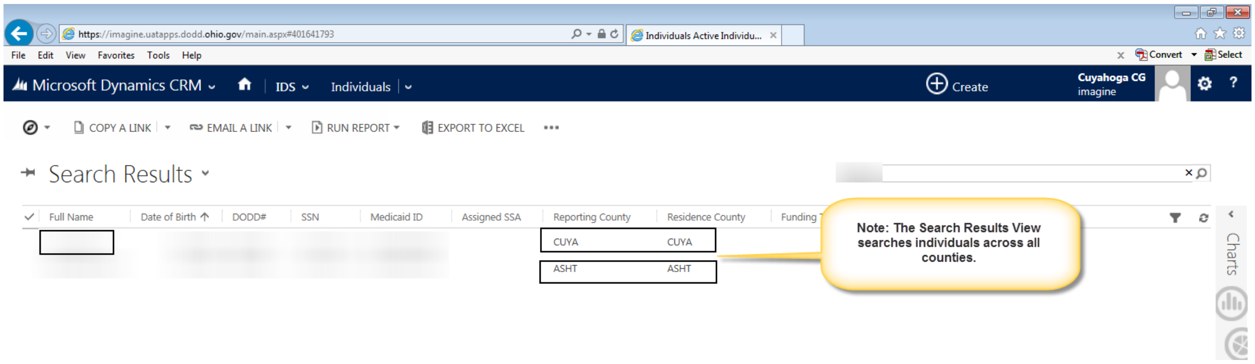
Name, Last Name, Full Name (Ex. Jonathan Dawkins), Date of Birth, Medicaid #, SSN and DODD#.

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

II. Hit **Enter** or click on the magnifying glass to search

III. Individual record(s) will be displayed if an individual exists in any of the 88 counties.

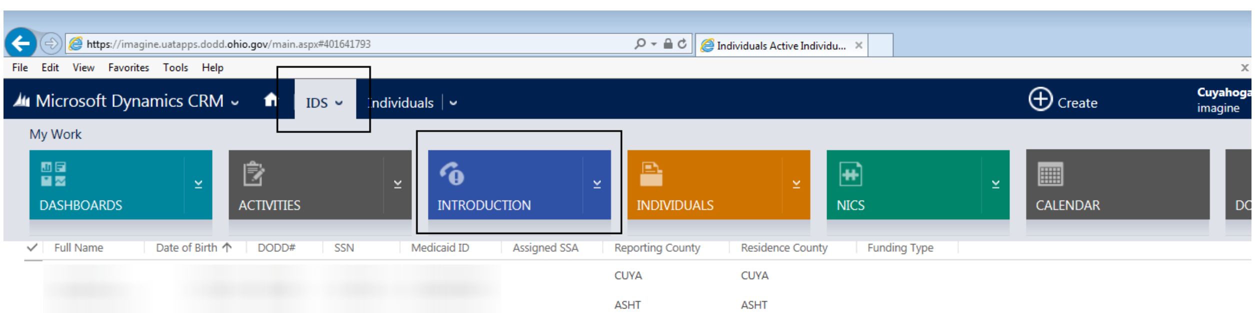




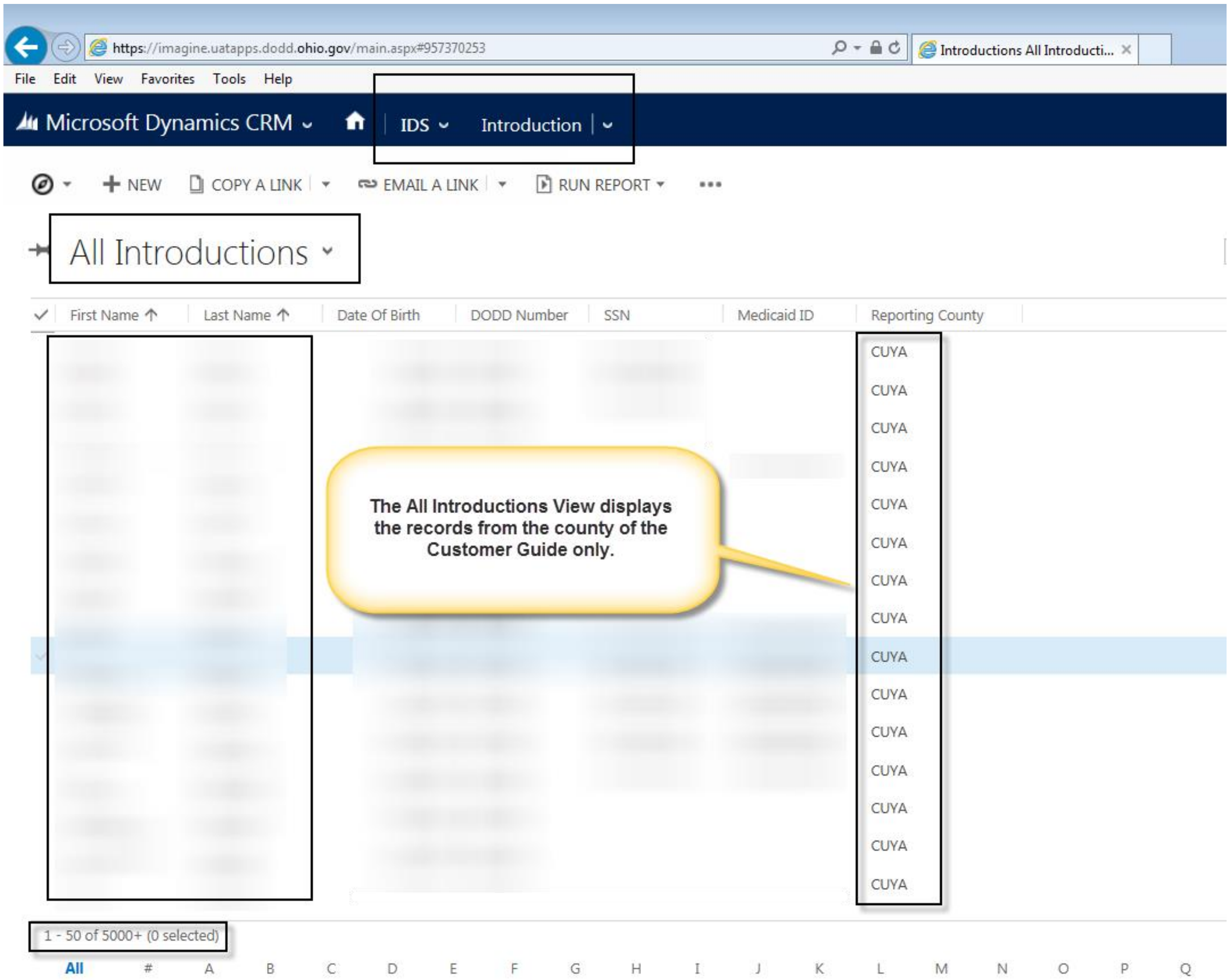
Start Individual Create Process

9. **Follow these steps to Create New Individual**

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



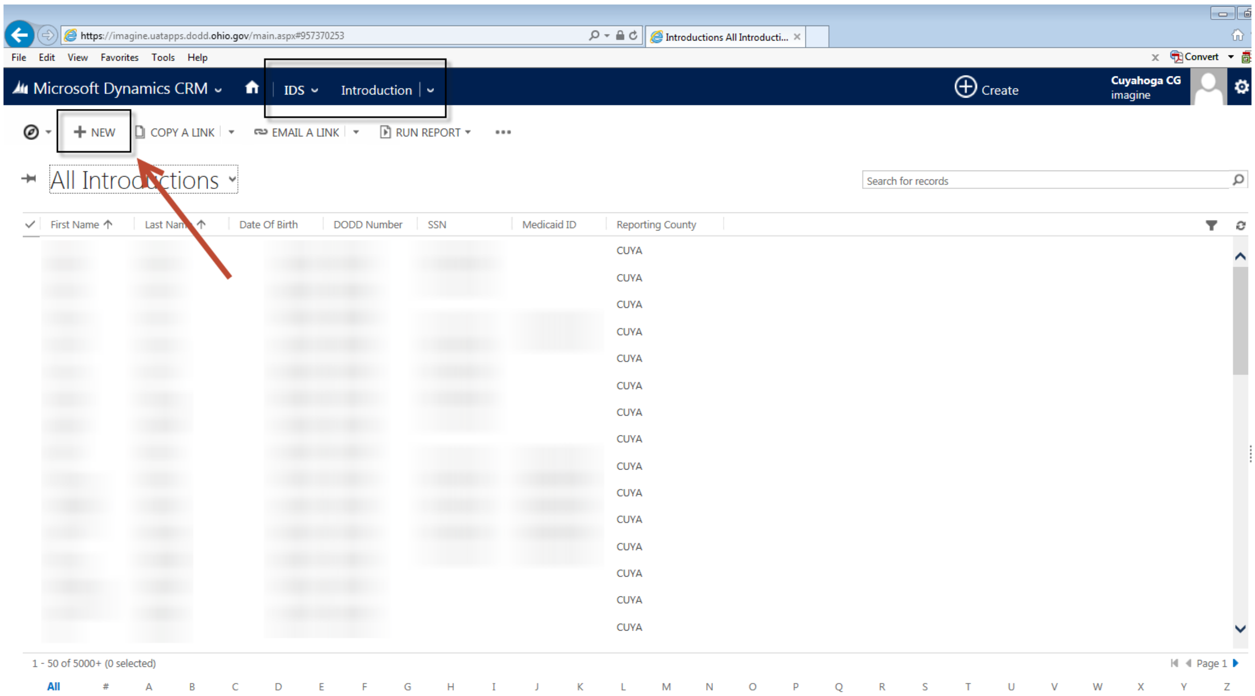
b) The **All Introductions** View displays introductions from the county of the Customer Guide only.


https://imagine.uatapps.dodd.ohio.gov/main.aspx#957370253
Introductions All Introducti...
File Edit View Favorites Tools Help
Microsoft Dynamics CRM
IDS
Introduction
NEW
COPY A LINK
EMAIL A LINK
RUN REPORT
All Introductions
First Name
Last Name
Date Of Birth
DODD Number
SSN
Medicaid ID
Reporting County
CUYA
The All Introductions View displays the records from the county of the Customer Guide only.
1 - 50 of 5000+ (0 selected)
All # A B C D E F G H I J K L M N O P Q

Create Introduction

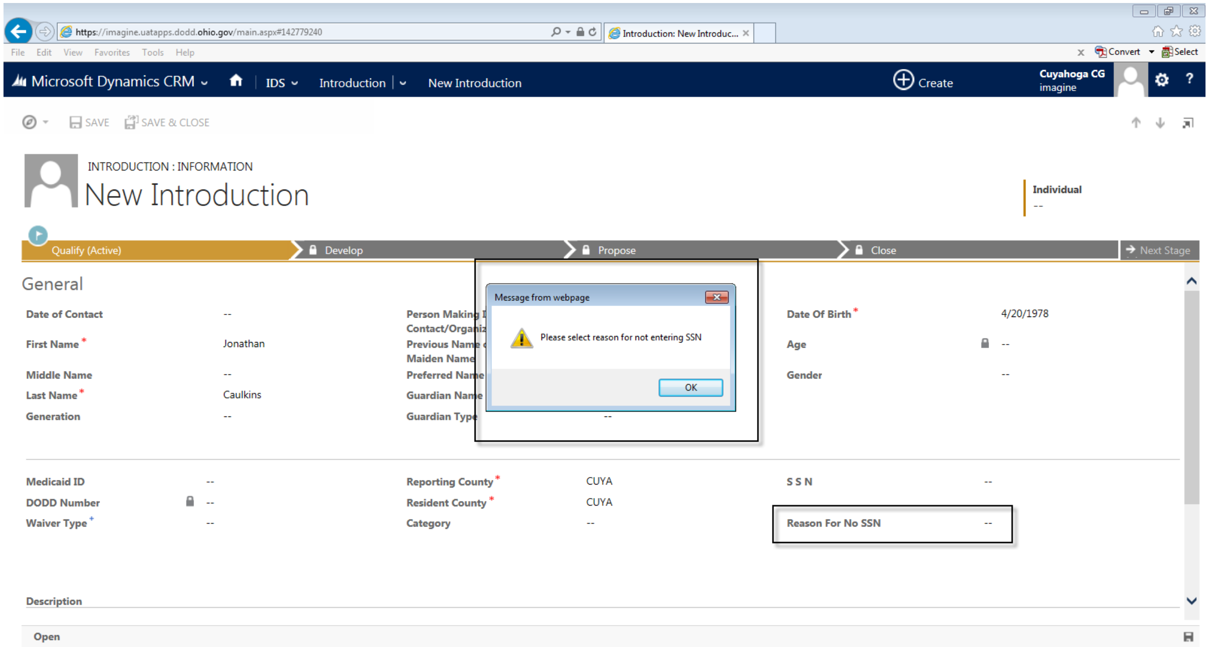
10. Follow these steps to Create Introduction

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

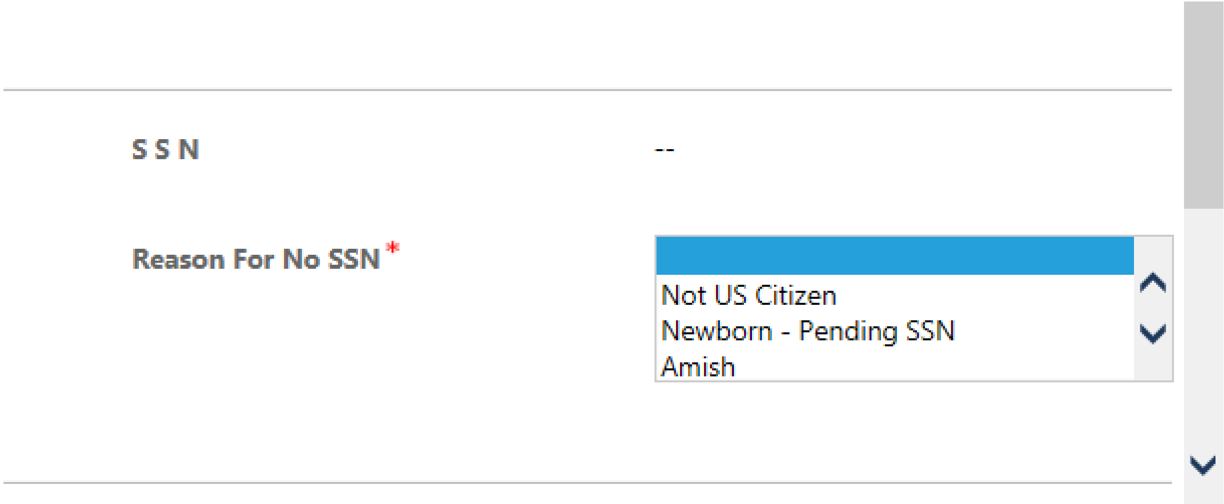


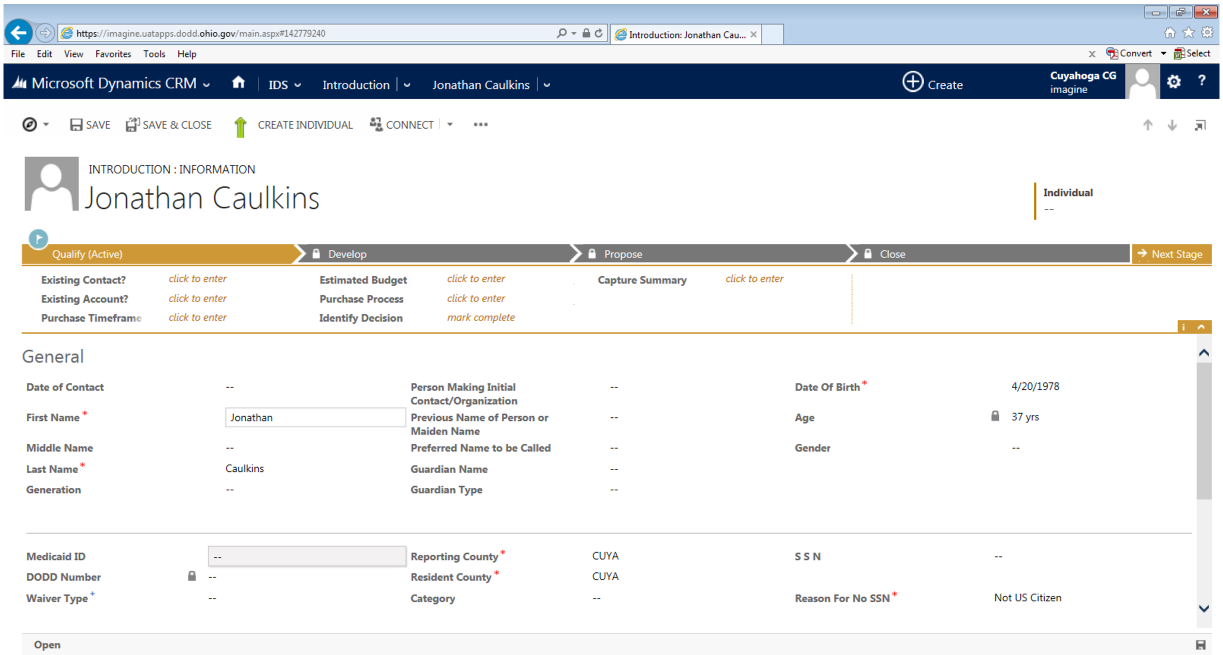
b) Enter the **General** introduction information like First Name, Last Name, Date of Birth, Reporting County, Resident County and SSN and/or Reason for No SSN.

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.

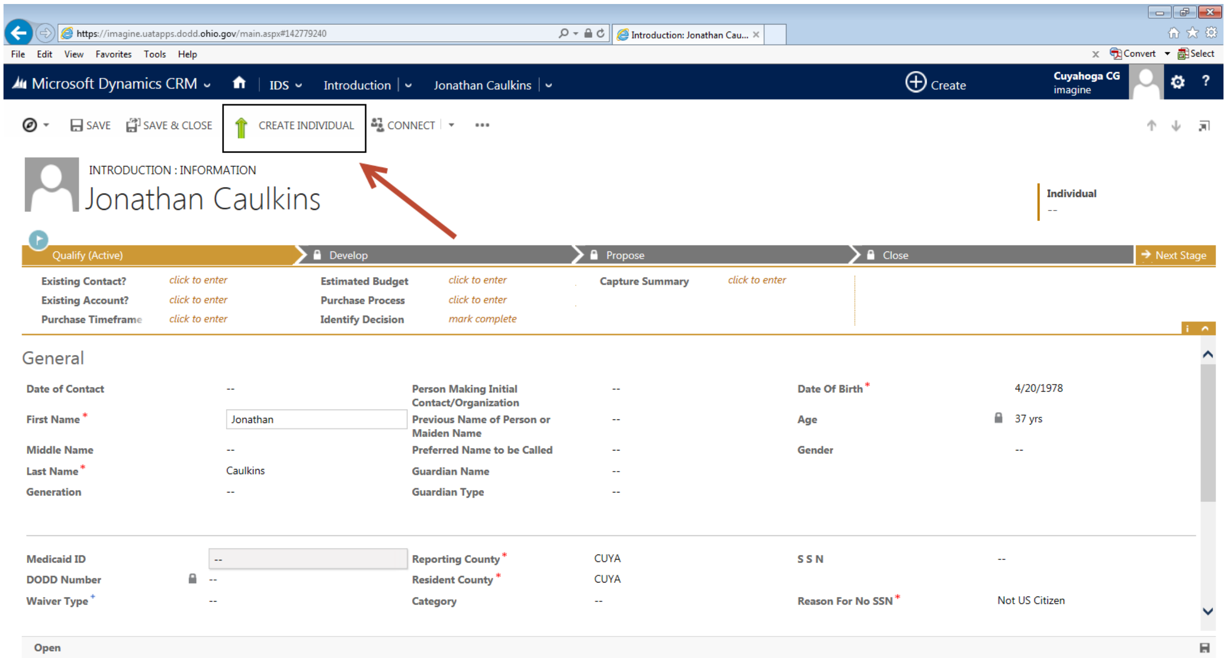




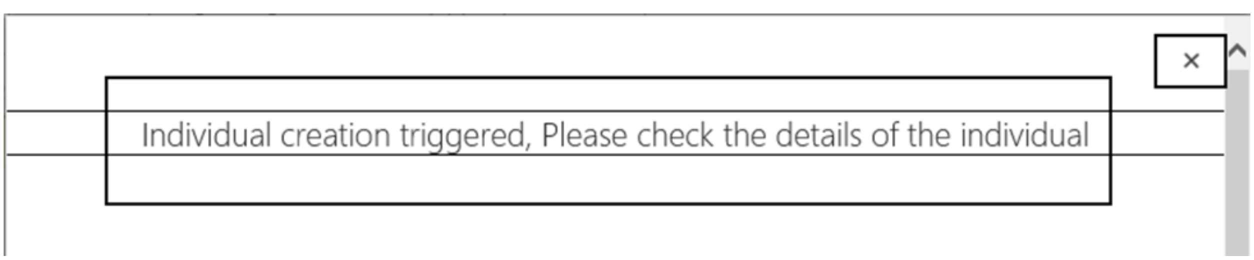
Create Individual

11. Follow these steps to Create Individual in IDS

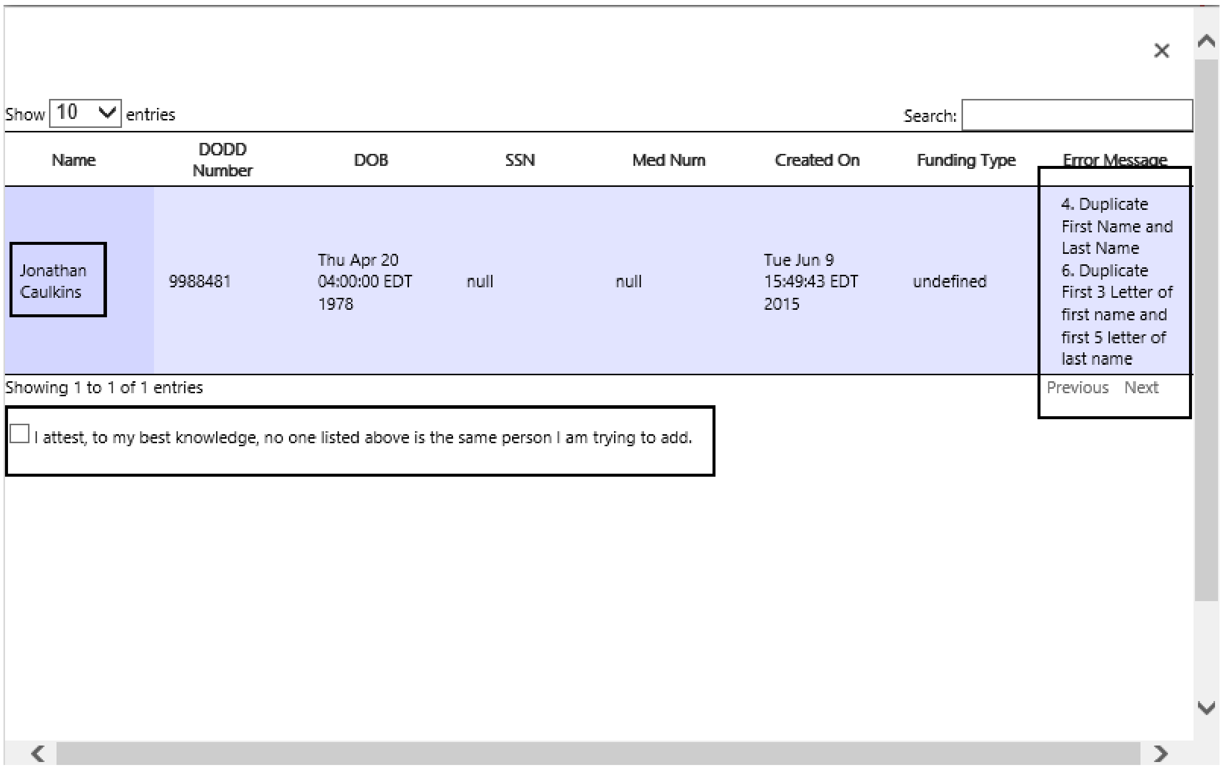
a) Once the new Introduction record has been created, the the **CREATE INDIVIDUAL** button will appear at the top of the page:



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.



Show 10 entries   Search:

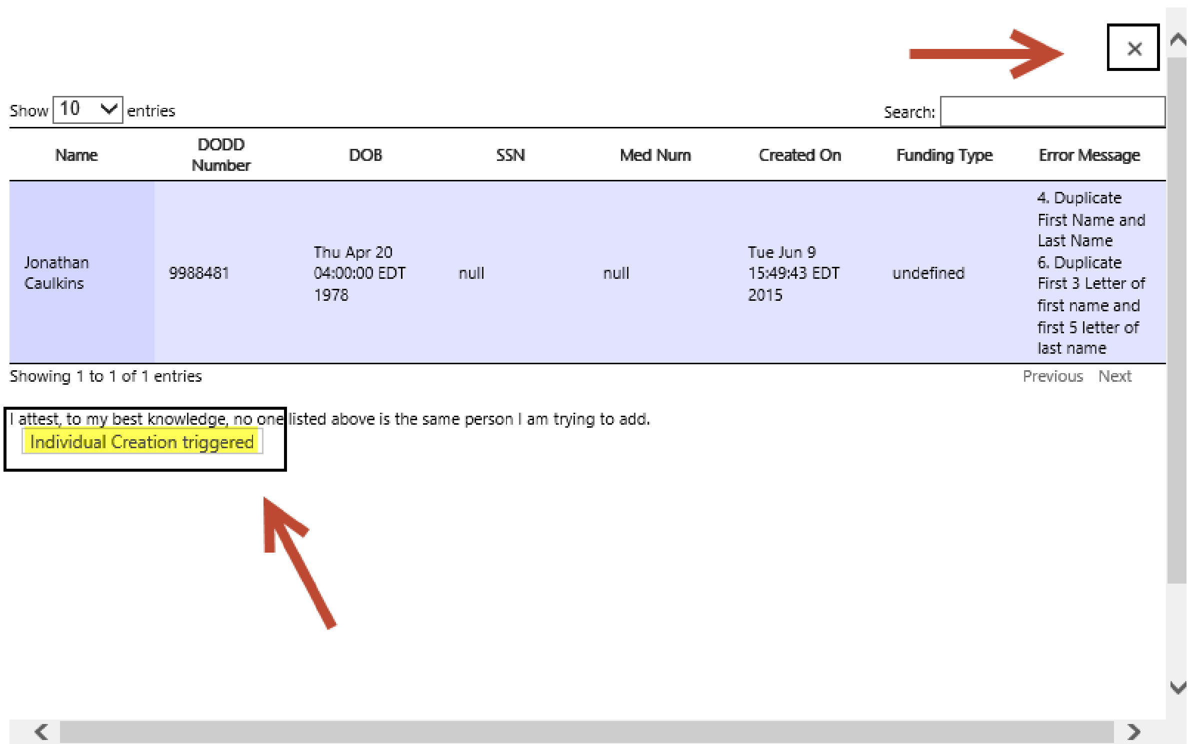
Name	DODD Number	DOB	SSN	Med Num	Created On	Funding Type	Error Message
Jonathan Caulkins	9988481	Thu Apr 20 04:00:00 EDT 1978	null	null	Tue Jun 9 15:49:43 EDT 2015	undefined	4. Duplicate First Name and Last Name 6. Duplicate First 3 Letter of first name and first 5 letter of last name

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.

Note: The system will <u>not</u> 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.

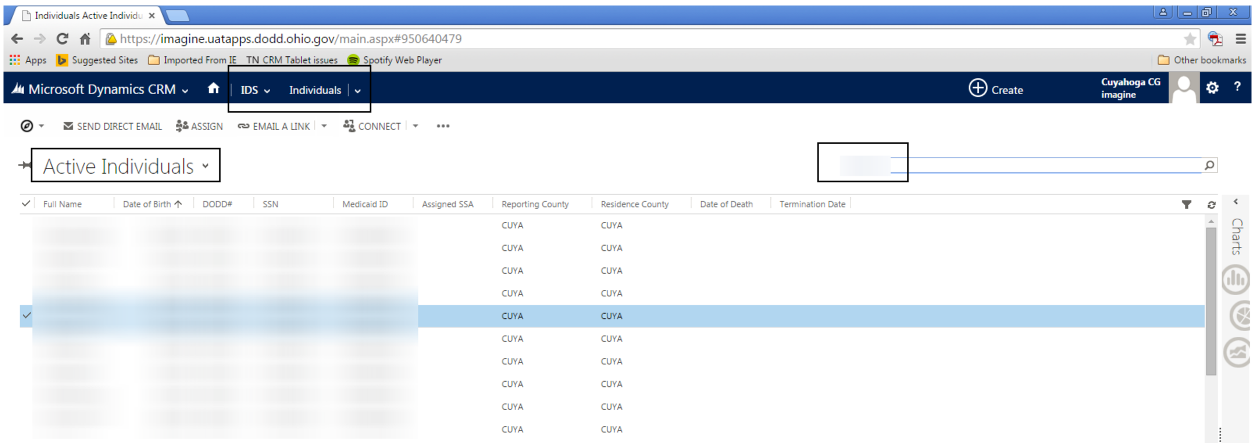


Search Individual

12. **Follow these steps to Search for individual**

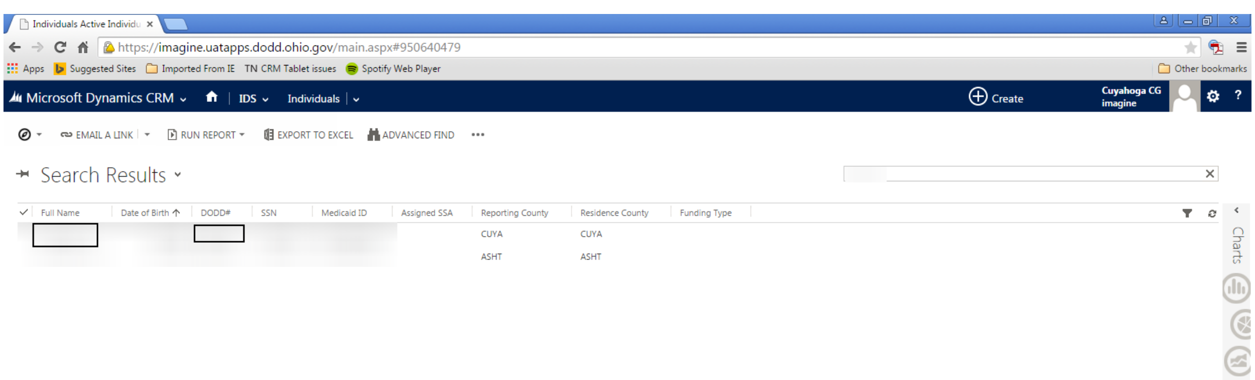
I. Search for an individual by entering search criteria in the search box. Fields available to search on include: First

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

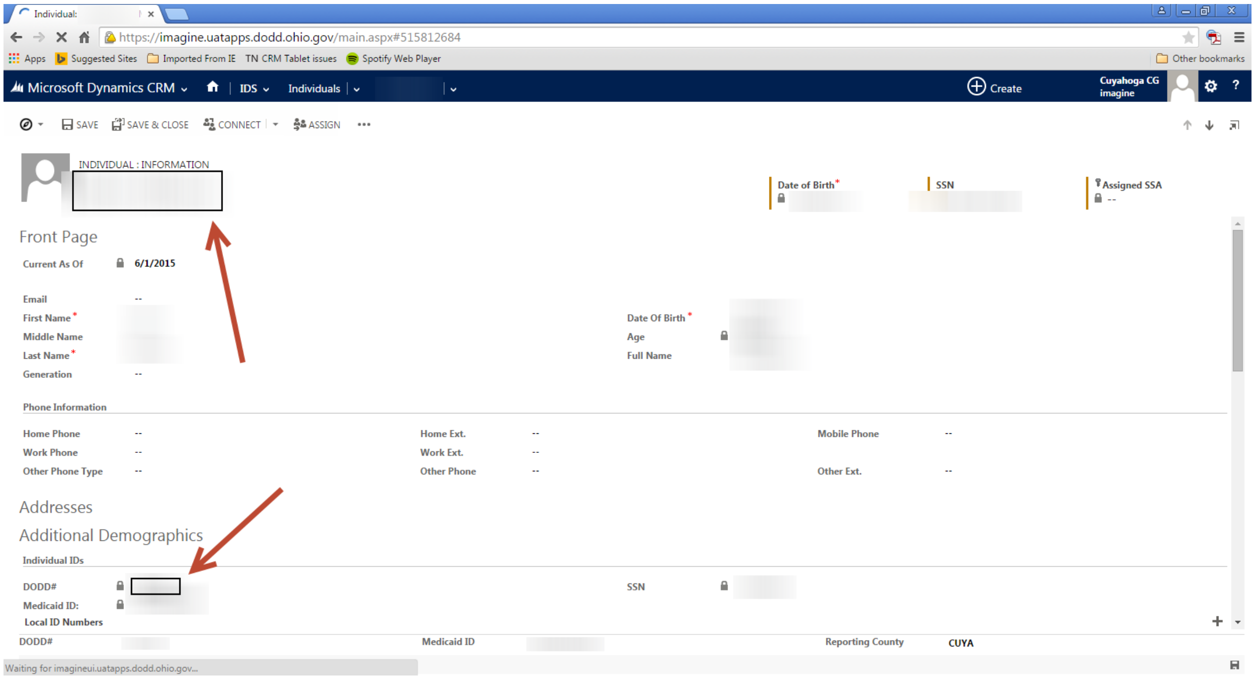


Note: As a Customer Guide you have the ability to search individuals across all 88 counties.

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.

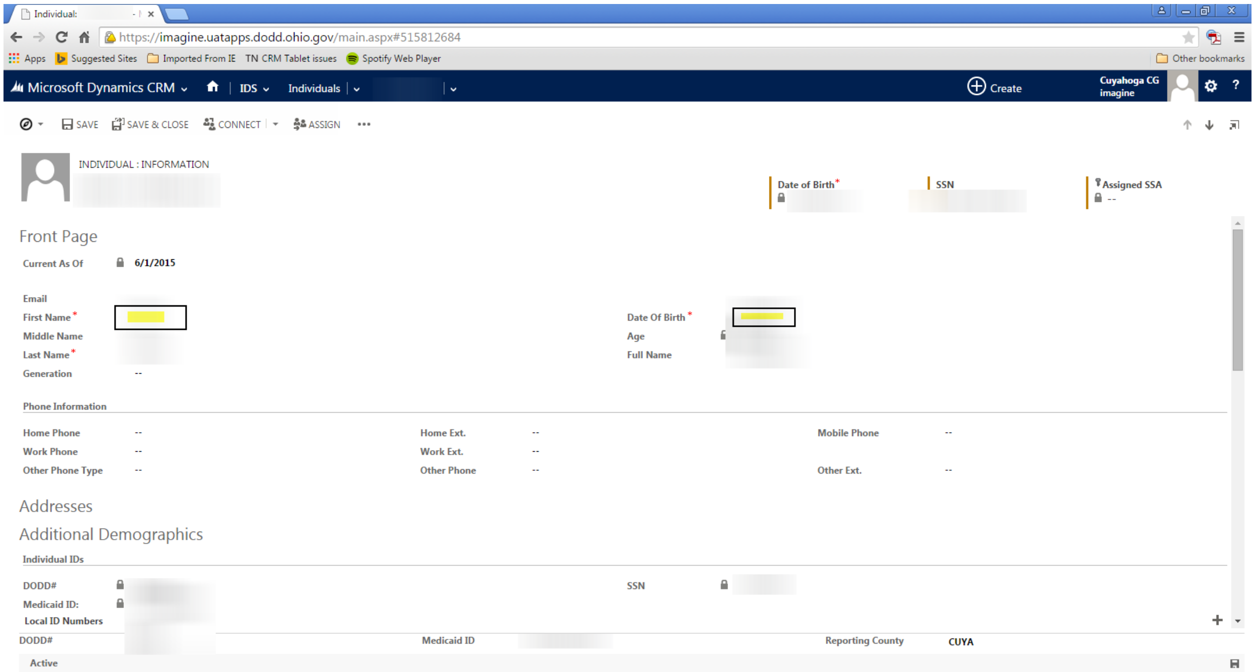


Edit Individual's Information

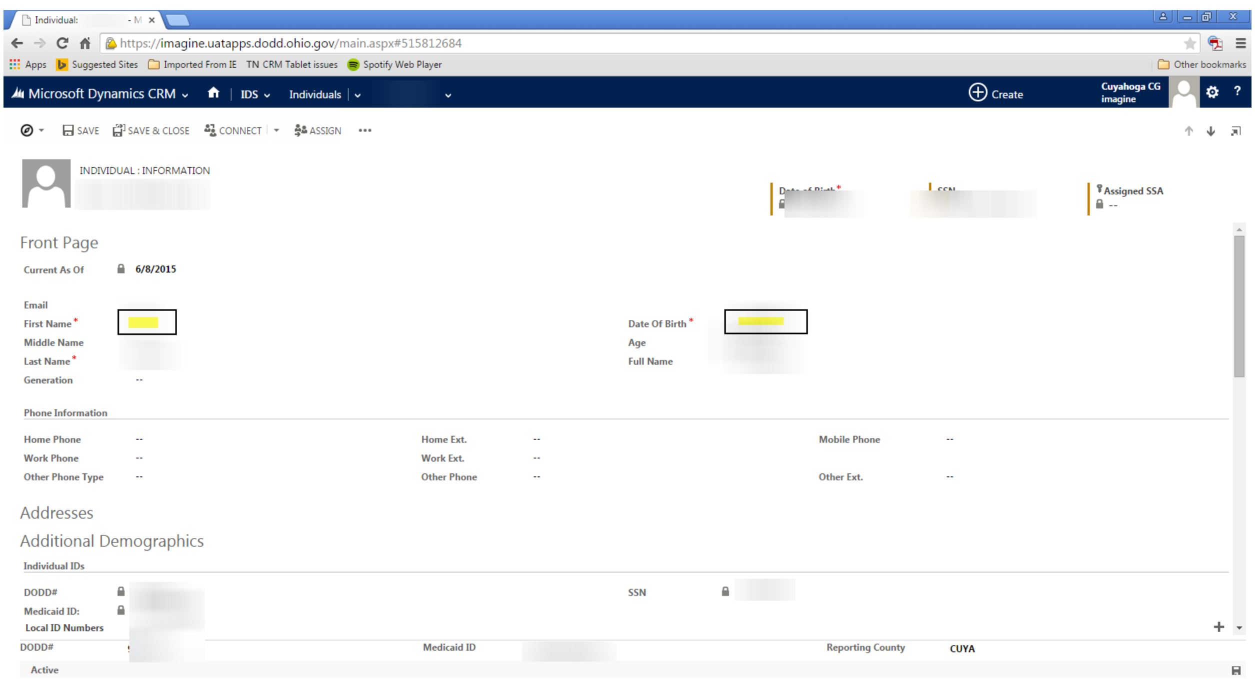
13. **Edit an Individual's Front Page information**

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:



After edit:

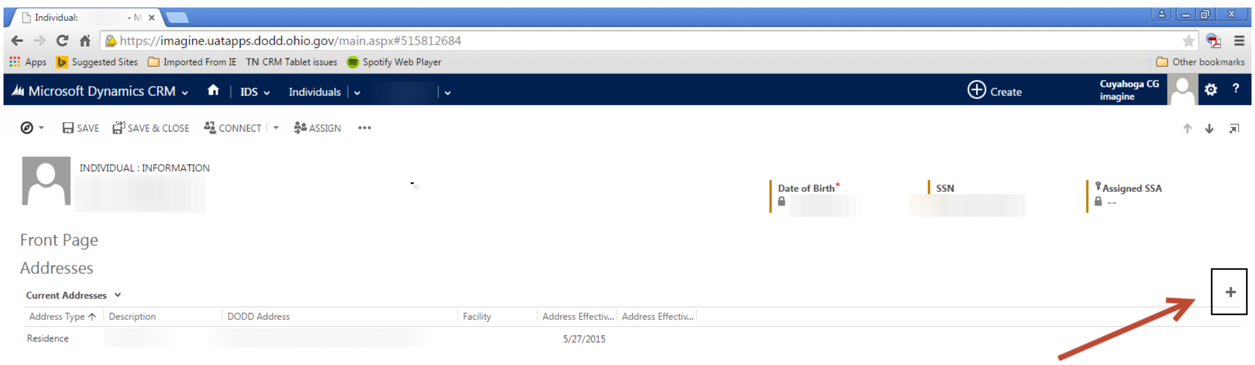


Add Address

14. **Add an Individual's Address information**

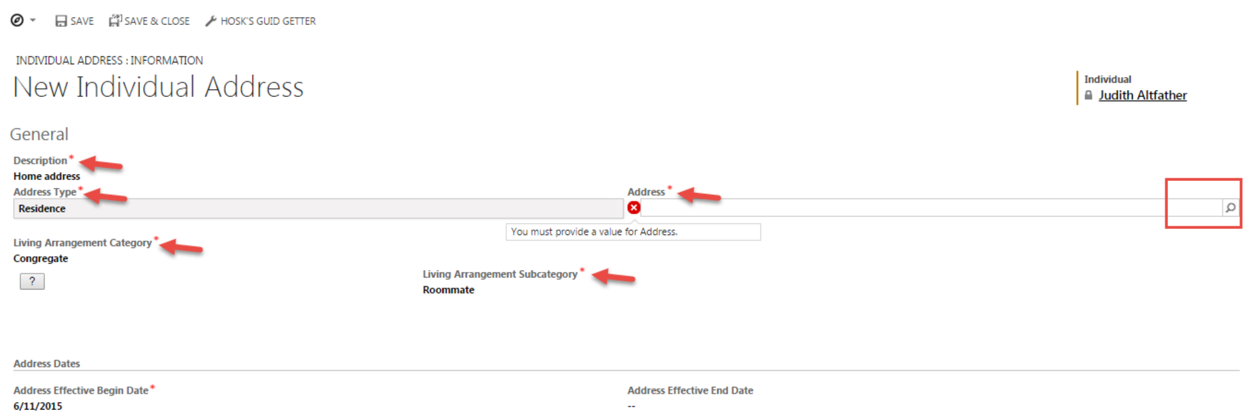
I. Expand the Address section of the Individual

II. Click the Plus sign at the right top of this section to go to

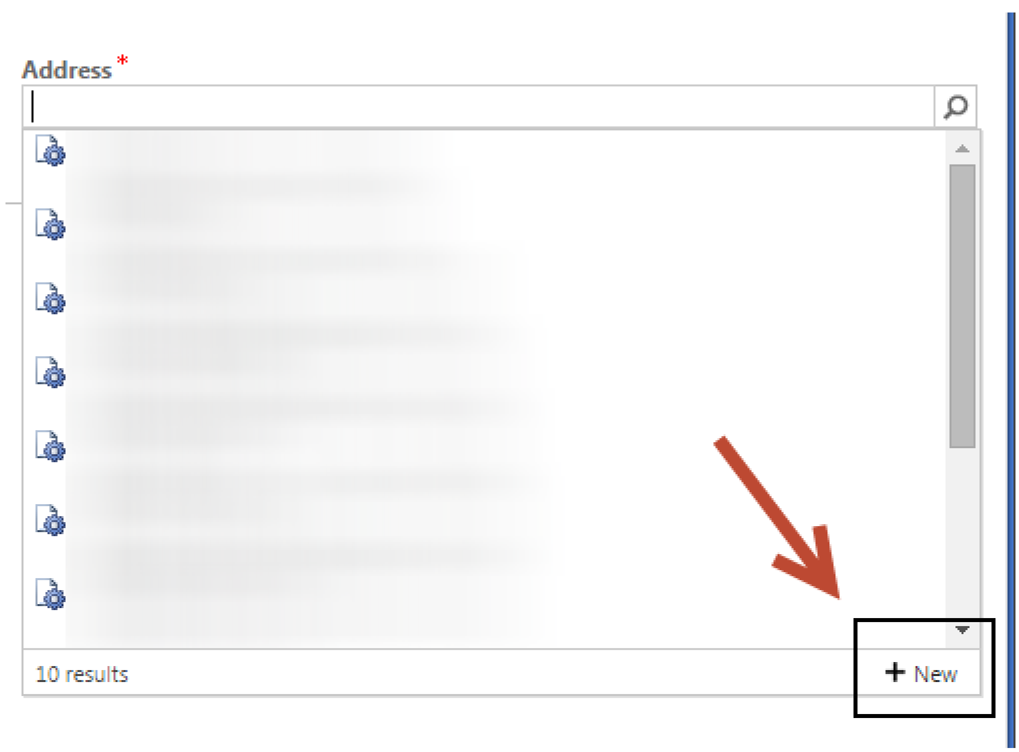


III. Description, Address Type, Address and Address Effective Begin date are all required fields denoted with a red asterisk (*). Clicking the magnifying glass will allow you to add a new address.

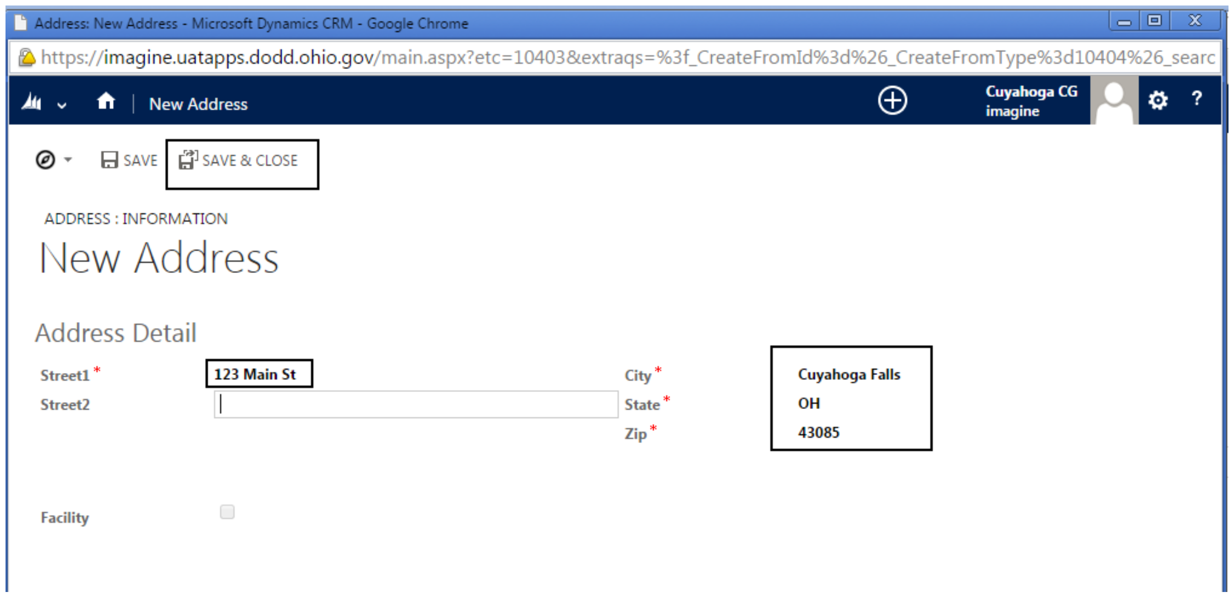
Note: If you select Residence as Address type, you need to select Living Arrangement Category and Subcategory. Also **NOTE you cannot enter a residence address if the individual lives in an ICF-IID** setting and if they live in a license setting, you will have to select the address from the listing of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



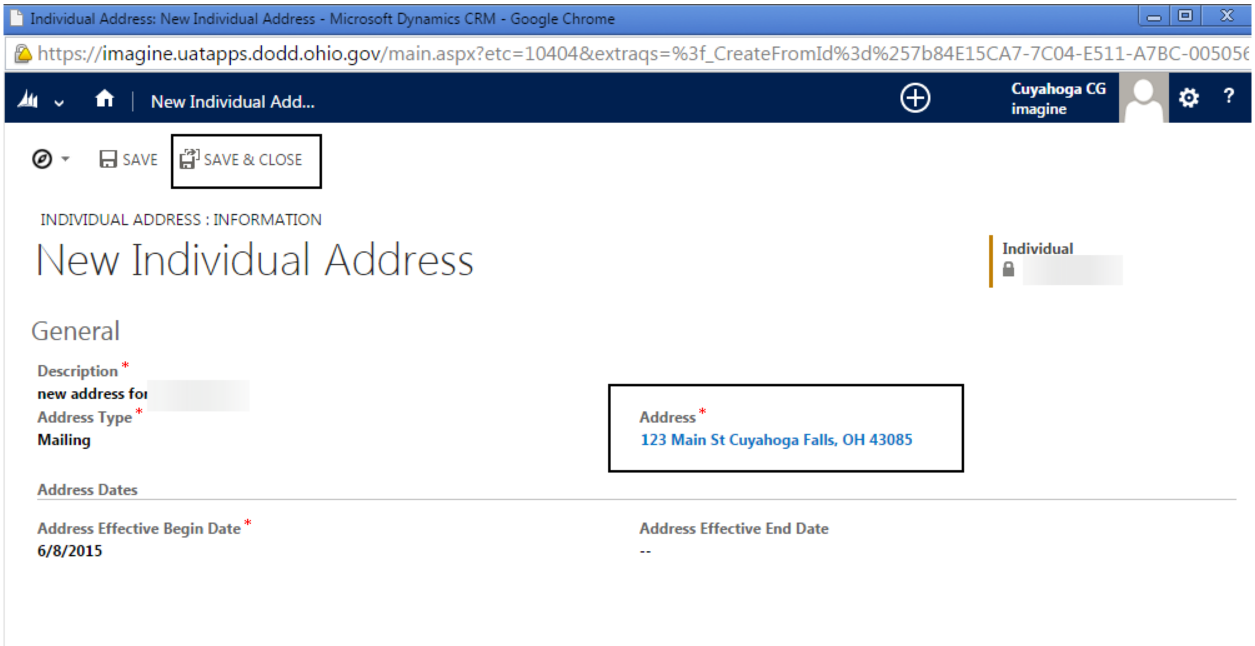
IV. Click the **+New** button



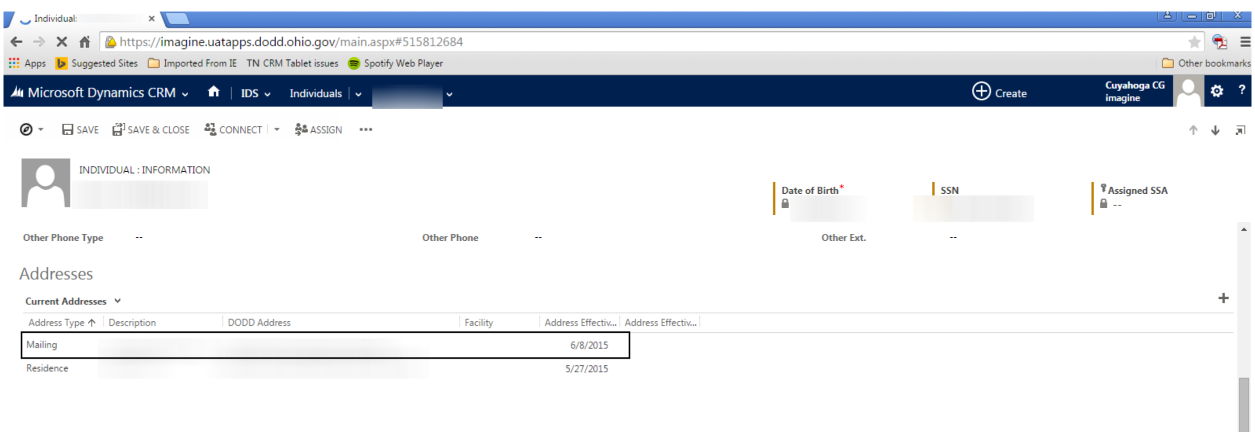
V. Street1, City, State and Zip are required fields denoted with a red asterisk (*). **SAVE & CLOSE** when you are done entering the new address detail.



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



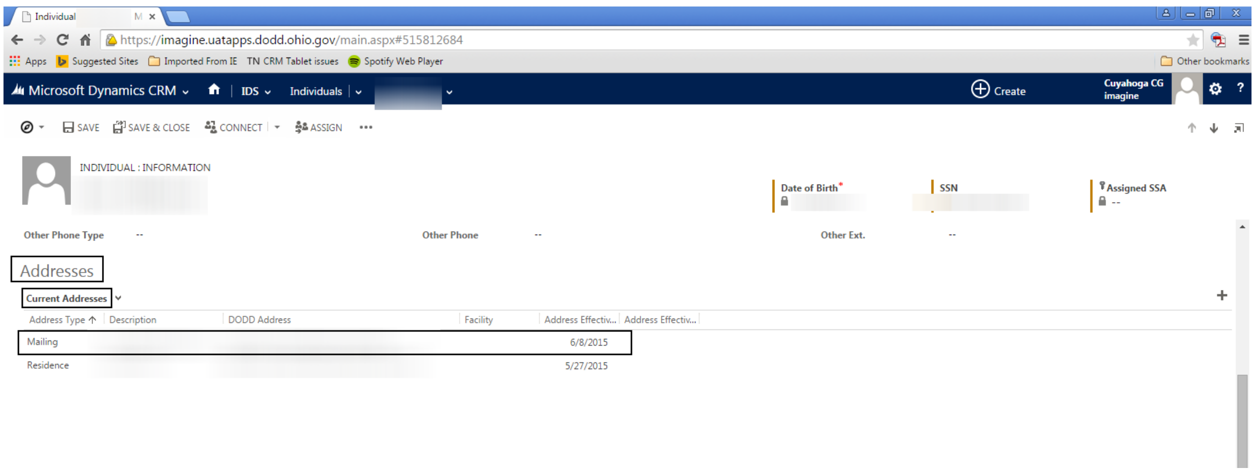
VII. You will now see the new address listed under Current Addresses.



Edit Individual Address

15. Edit an Individual Address

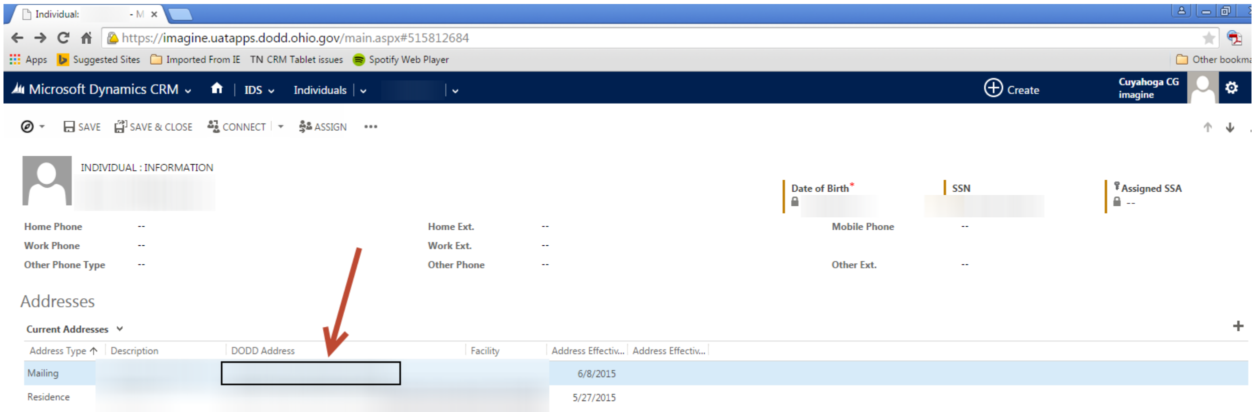
I. While on the Individual Information page scroll down to the Address section. All existing addresses will be displayed under Current Addresses.



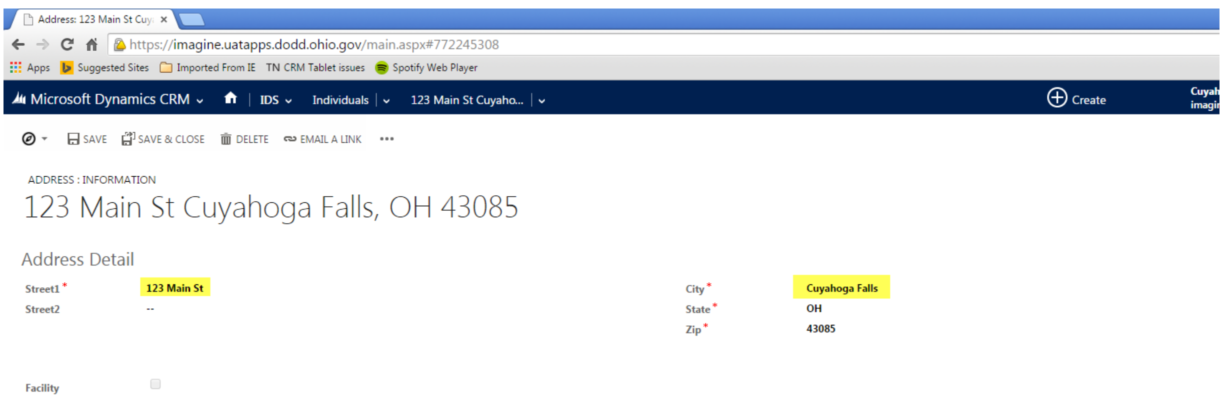
II. Click the field (Hyperlink) called **DODD Address** to open the Individual Address you would like to edit. This will take you directly to the *actual address* information.

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.

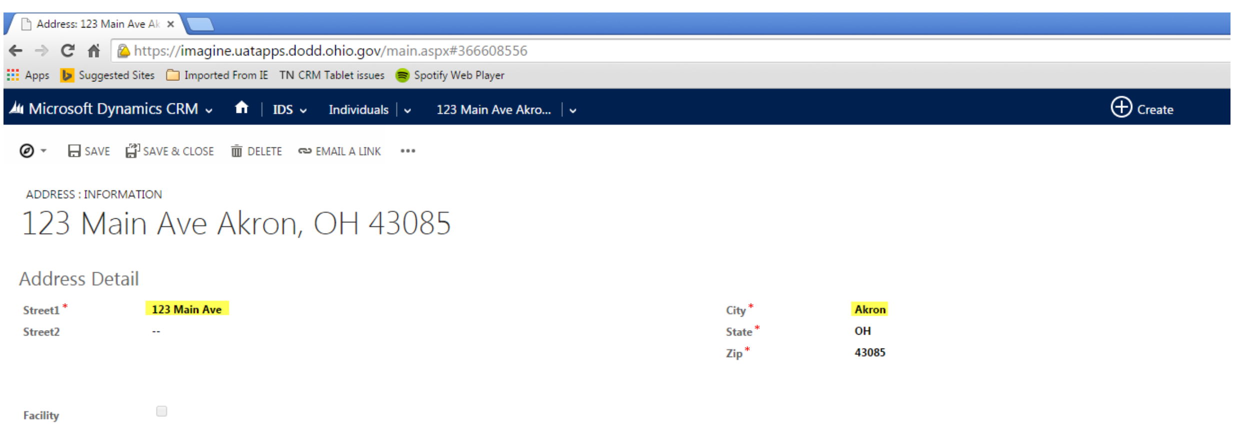
Note: Only residence addresses will be updated in the legacy IDS for use by other DODD systems.



Before edit:



After edit:



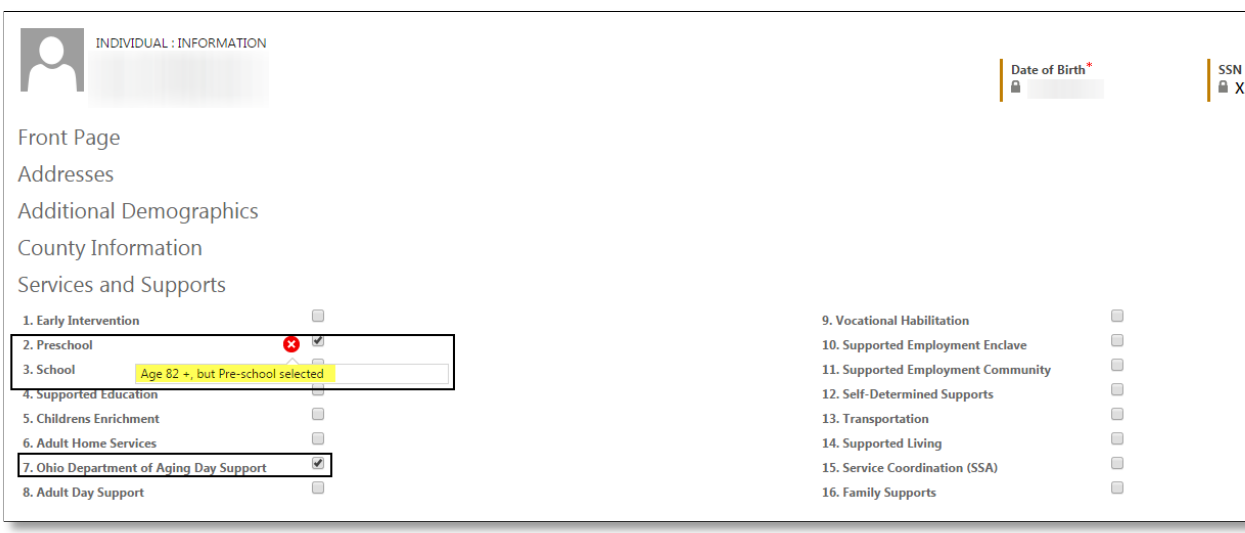
Edit Service and Support

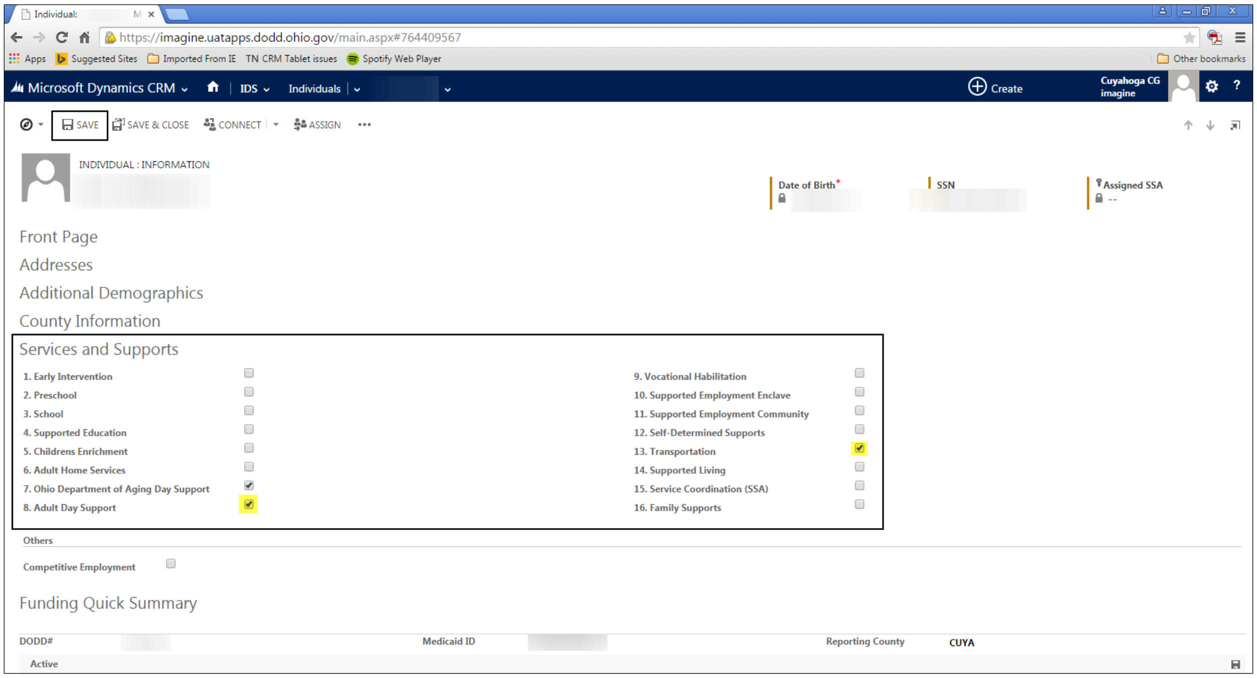
16. Edit (add or remove) Services and Support

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.

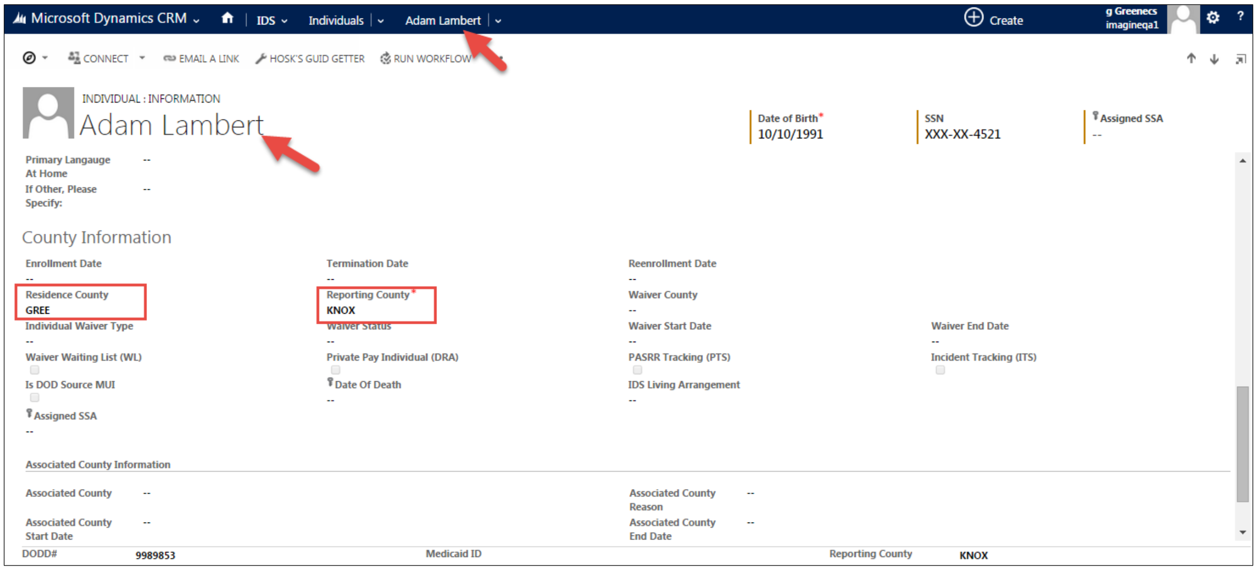




Individual Transfer Process (ITR)

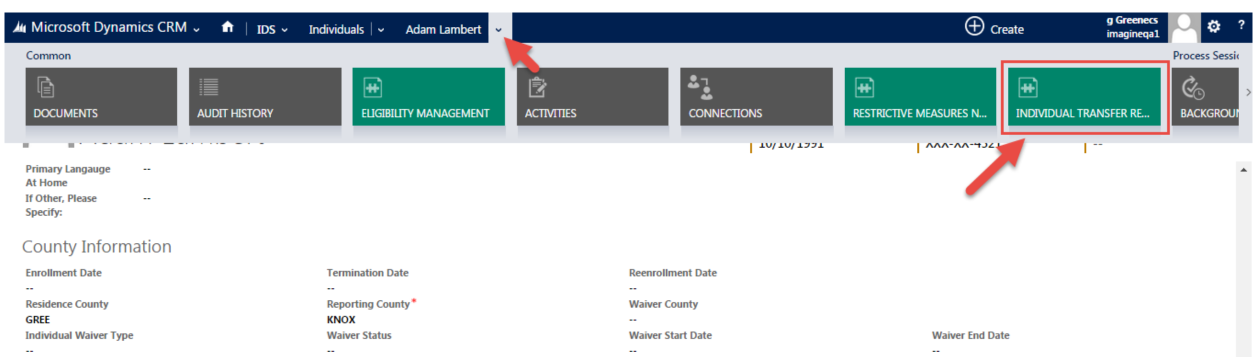
17. Follow these steps to complete Individual Transfer Process

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

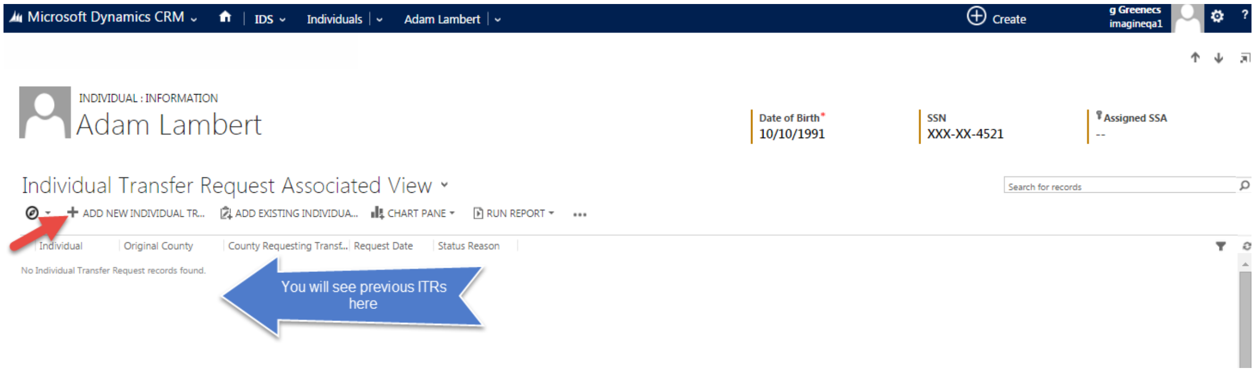


II. If individual is not in your county, then **Start the ITR process** for the individual

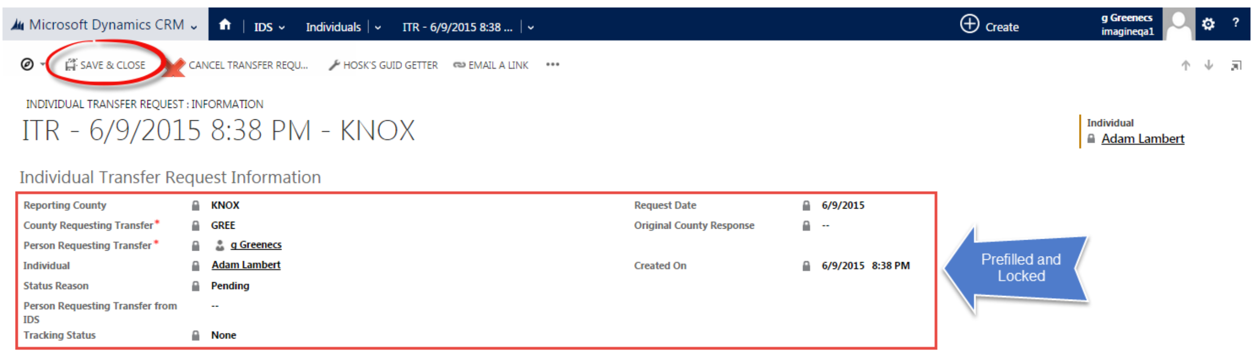
III. Click on the dropdown arrow next to individual's name and select the **Individual Transfer Request tile**



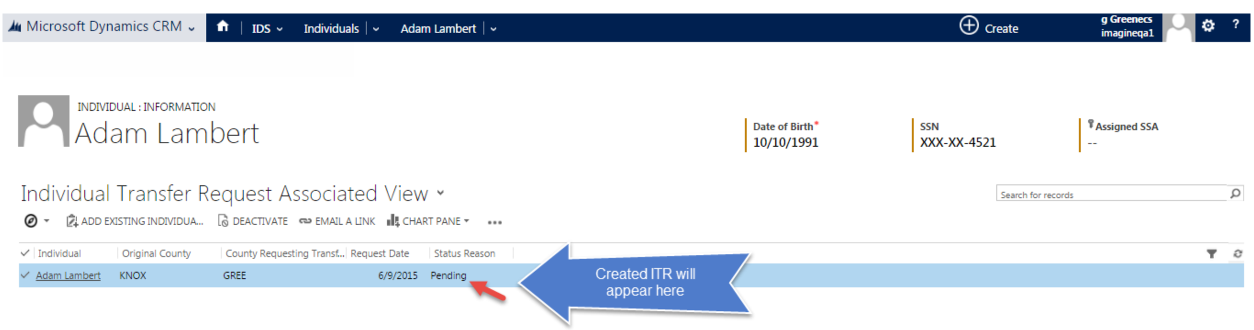
IV. You will see **Individual Transfer Request Associated view**, where you can view all the ITRs done for that individual. You can also Add new ITR from here by clicking on the **+Add New Individual Transfer Request**



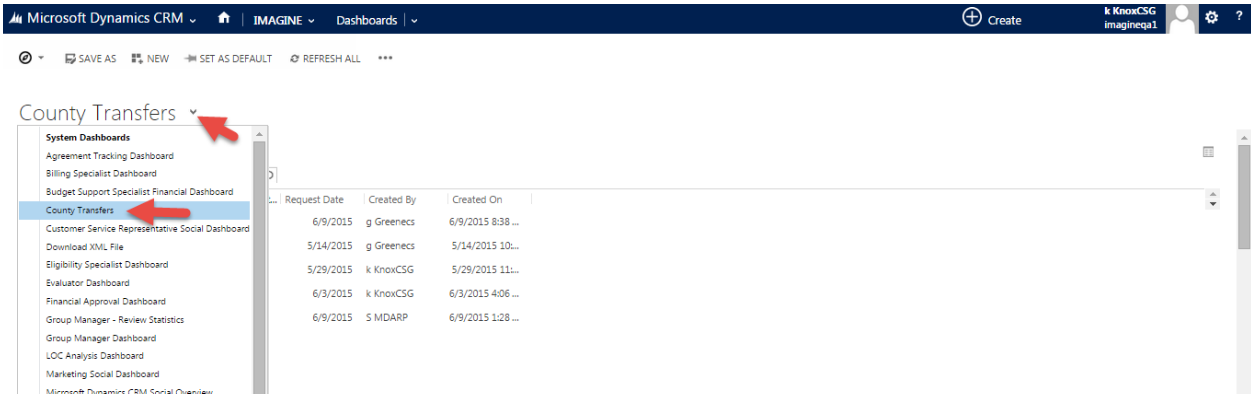
V. ITR form will be created and will open in a new window. **Everything on the form will be prefilled and locked**, you just have to click on the **Save and Close** button



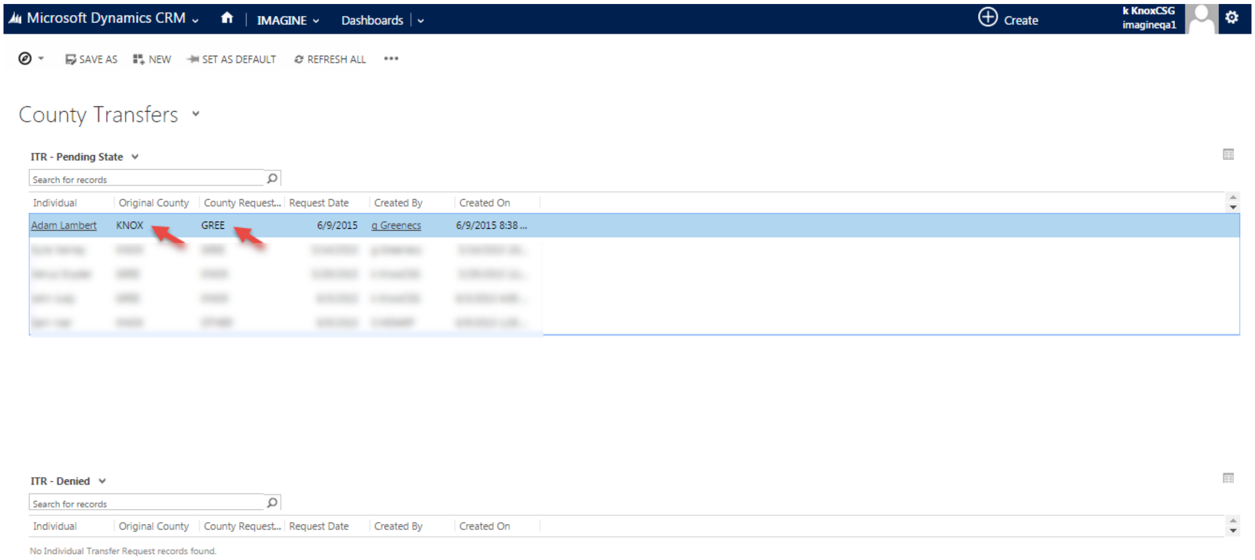
VI. ITR will appear under the Individual Associated View and the Status reason will Pending once you do a Save and Close



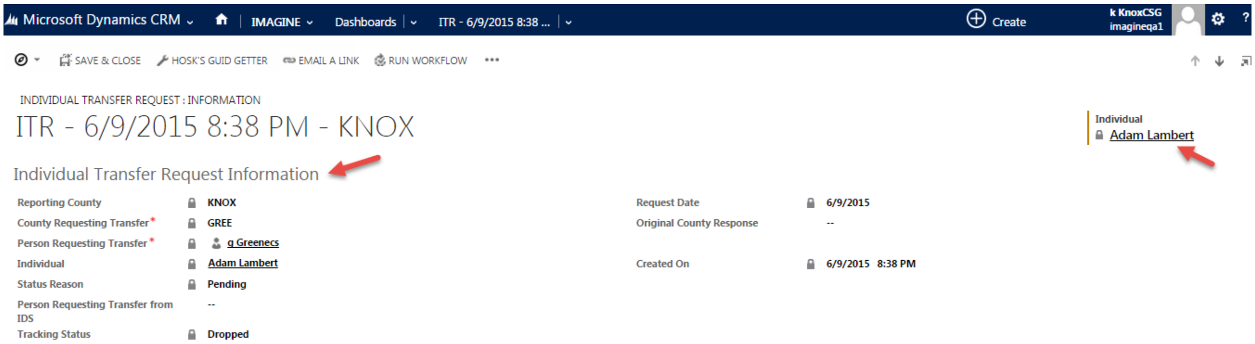
VII. Customer Guide from requesting county and reporting county can change the dashboard view to County Transfer



VIII. Can view the ITRs on this County Transfer Dashboard

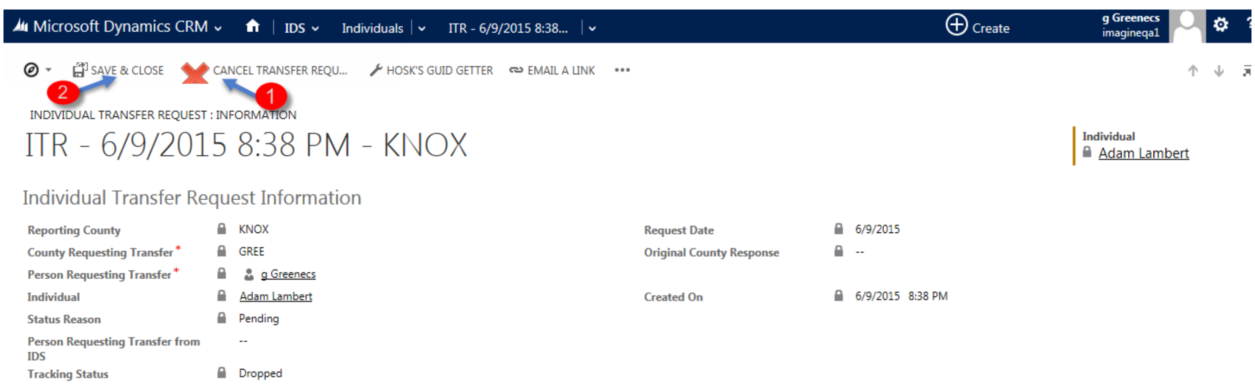


IX. Click on the record to open the ITR record

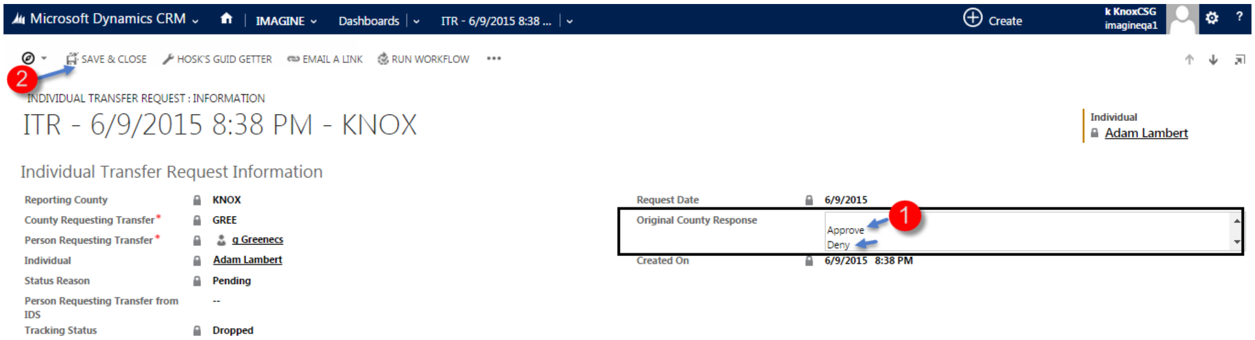


X. The **original county can either Approve or Deny** the ITR or the **requesting county can Cancel** the submitted request

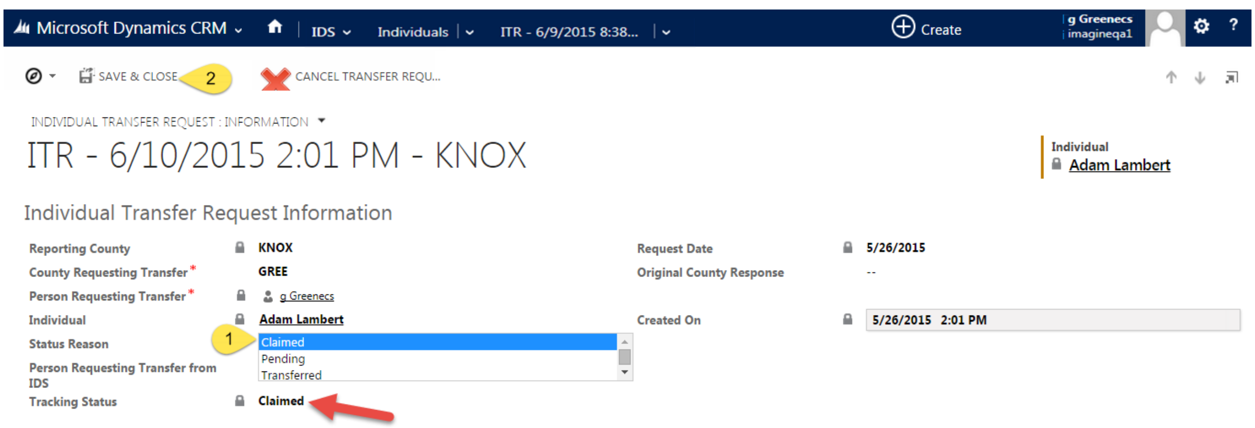
- Requesting county customer guide can click on **Cancel Transfer button (Red Cross)** at the top to cancel your transfer anytime



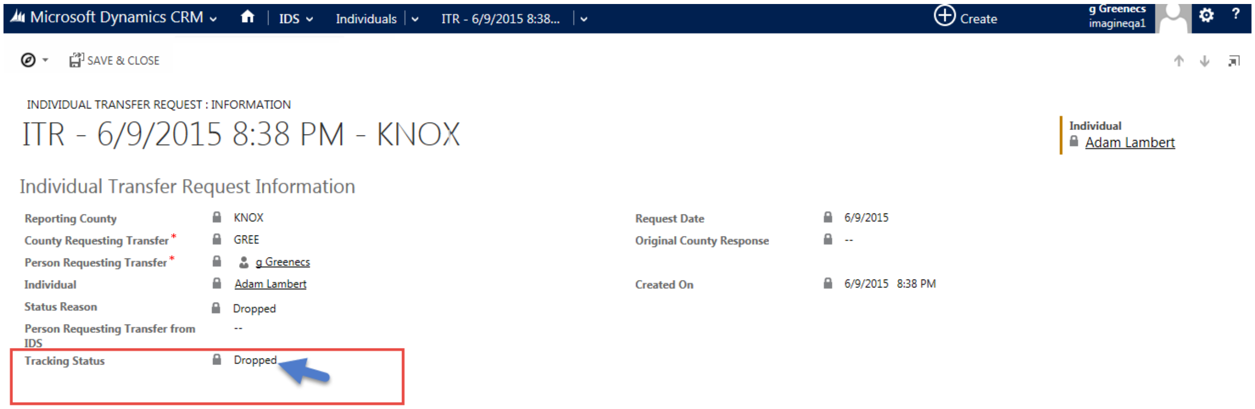
- Original county customer guide can click on the **Original County Response field** to either **Approve or Deny to approve or deny the ITR** respectively



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
SAVE & CLOSE
INDIVIDUAL TRANSFER REQUEST : INFORMATION
ITR - 6/9/2015 8:38 PM - KNOX
Individual
Adam Lambert
Individual Transfer Request Information
Reporting County
KNOX
County Requesting Transfer
GREE
Person Requesting Transfer
g Greenecs
Individual
Adam Lambert
Status Reason
Dropped
Person Requesting Transfer from IDS
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Tracking Status
Dropped
Request Date
6/9/2015
Original County Response
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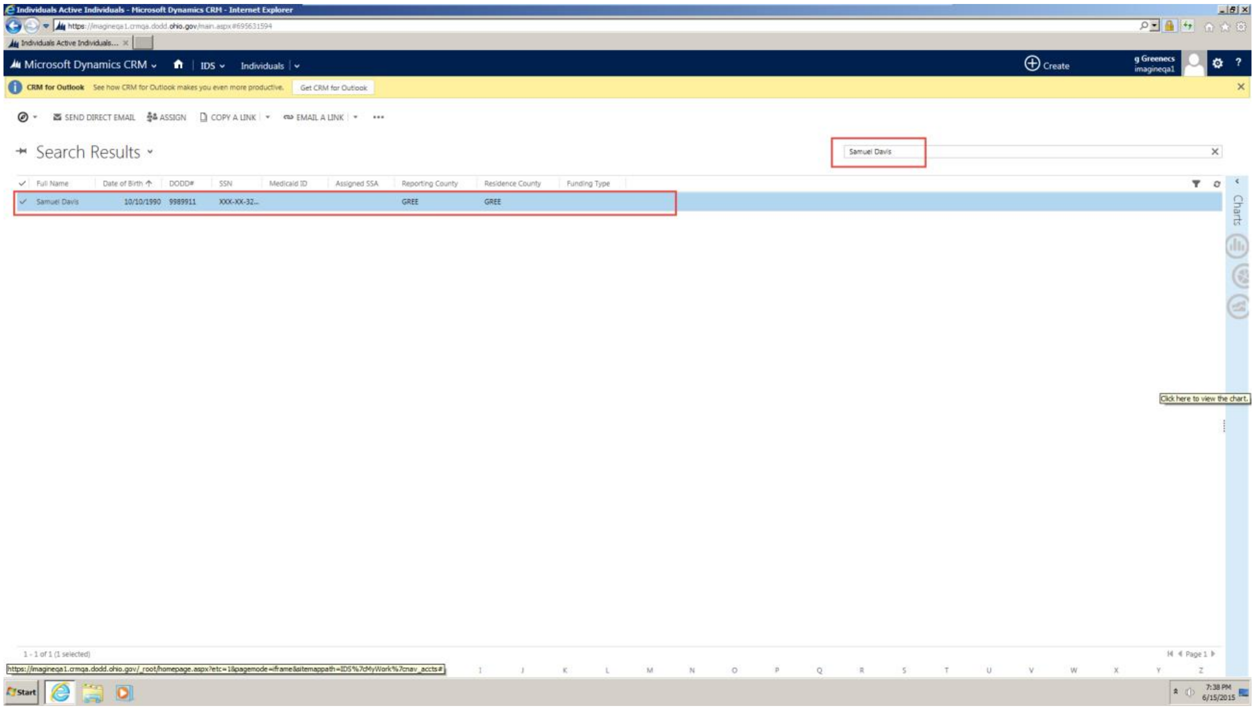
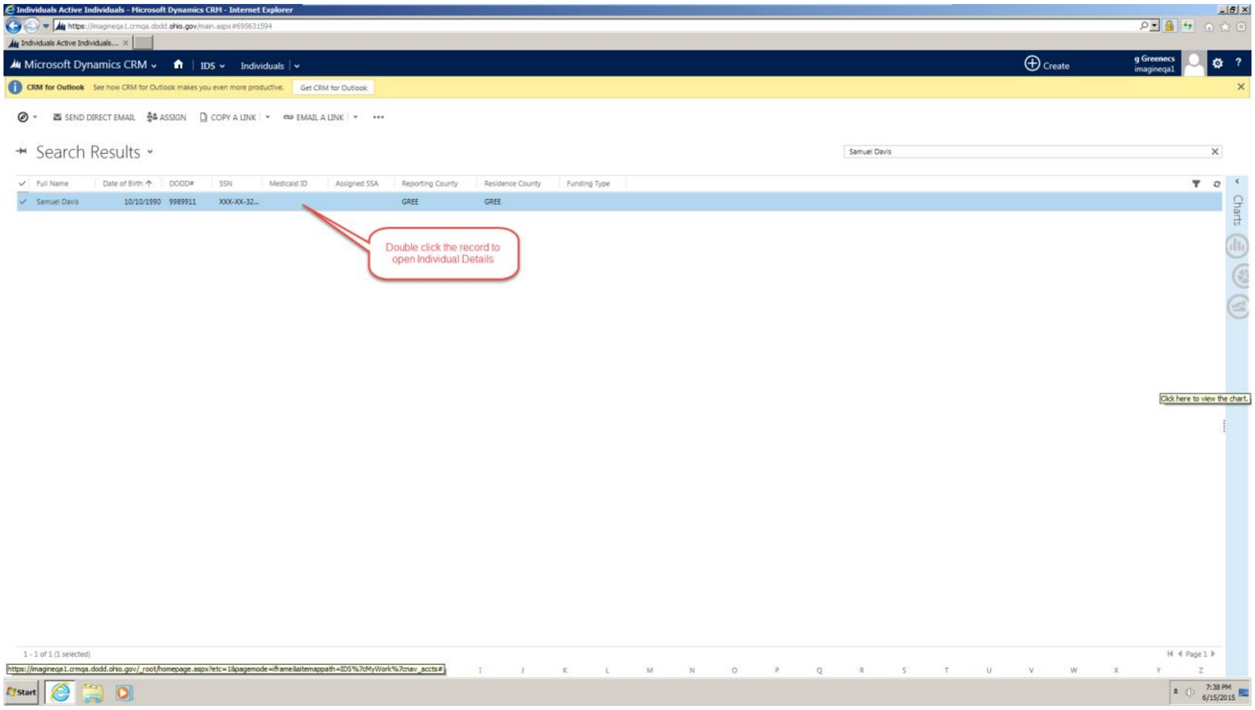
Created On
6/9/2015 8:38 PM

Decision Tree for County Board Eligibility

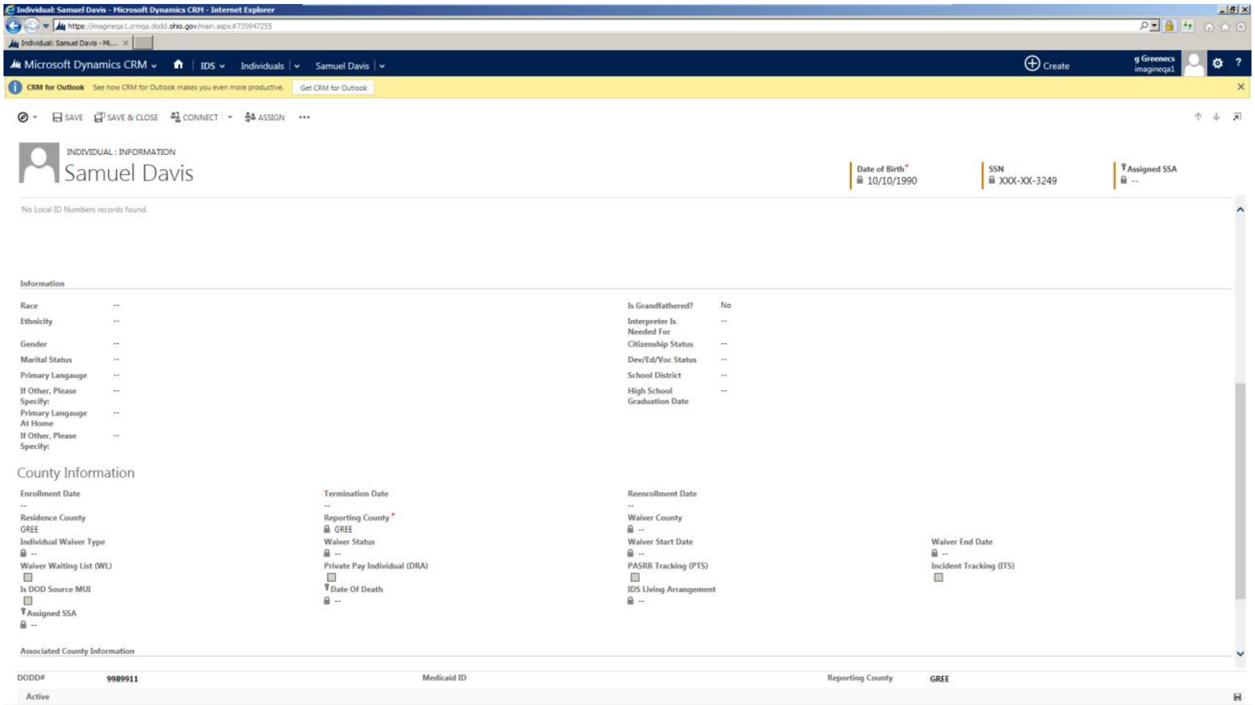
1. To start county board eligibility for an Individual, **Search for individual** by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box
3. **Individual record will show up** if individual exist in your county



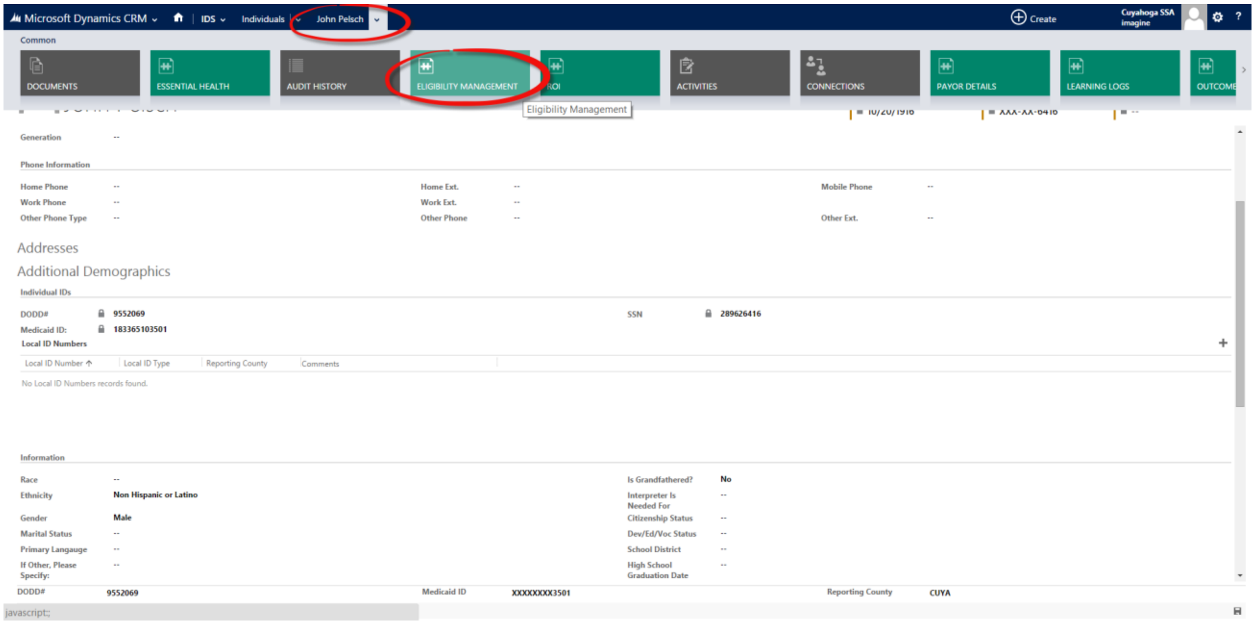
4. Double click on individual record to open individual's record



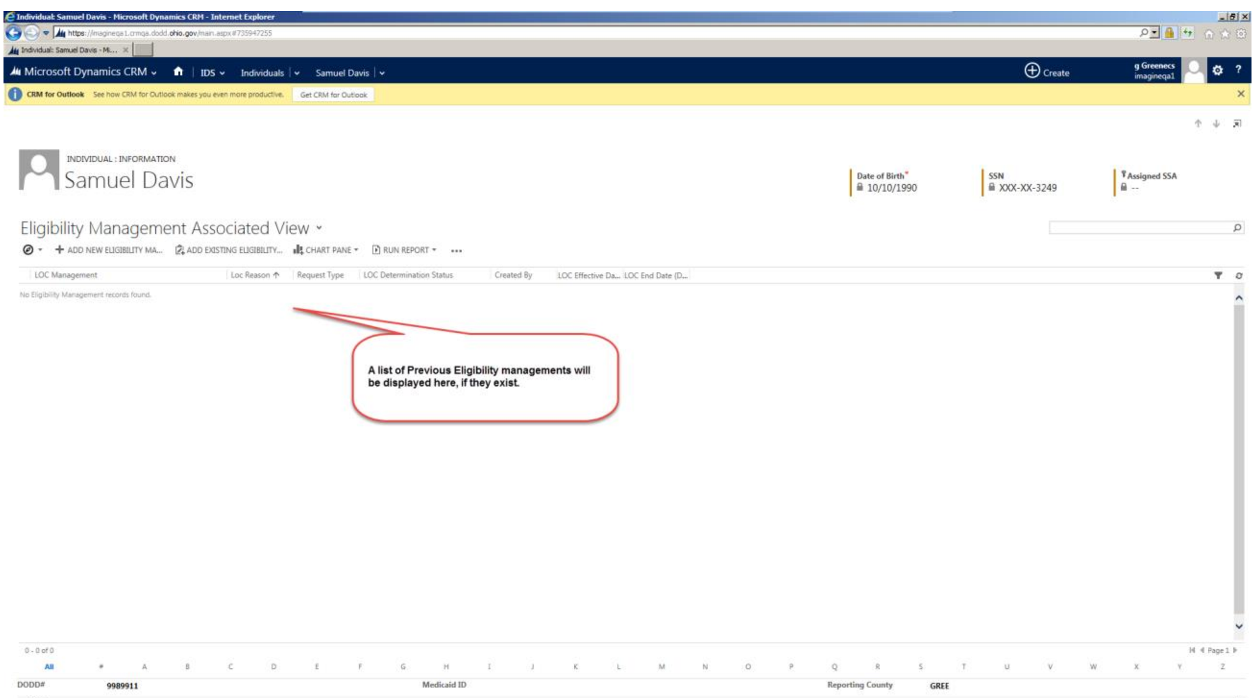
5. User will land on **Individual front page.**



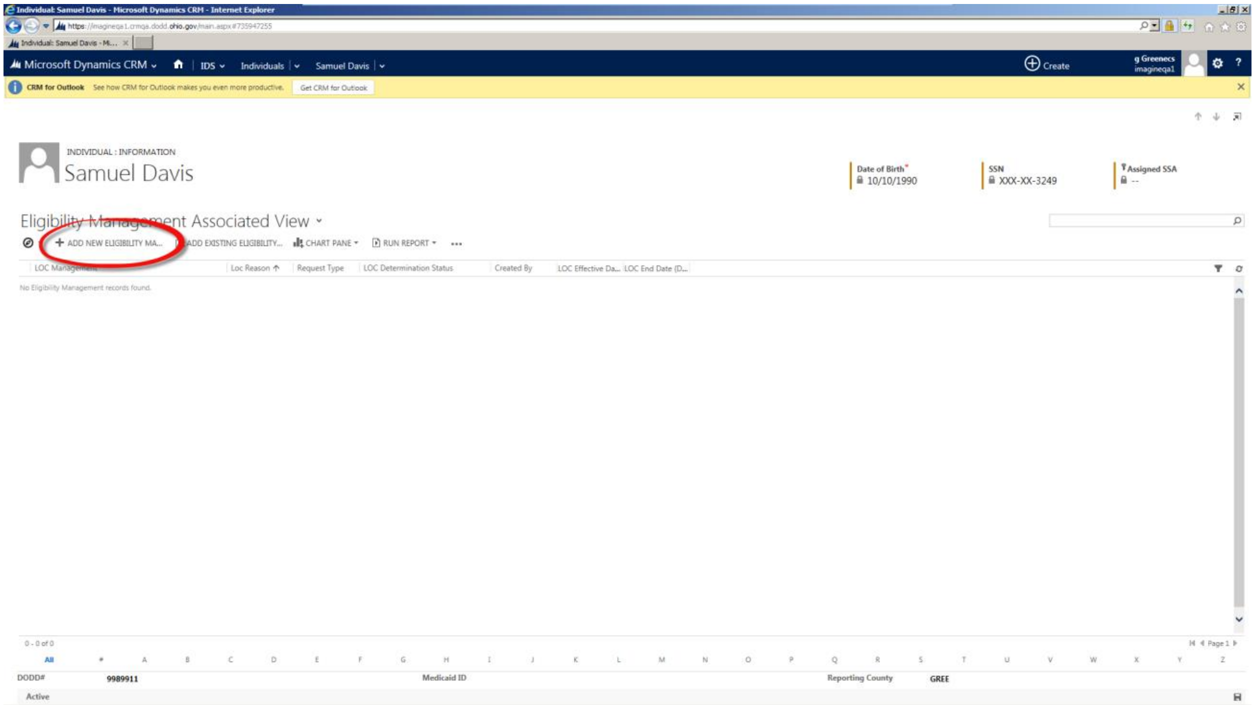
6. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



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

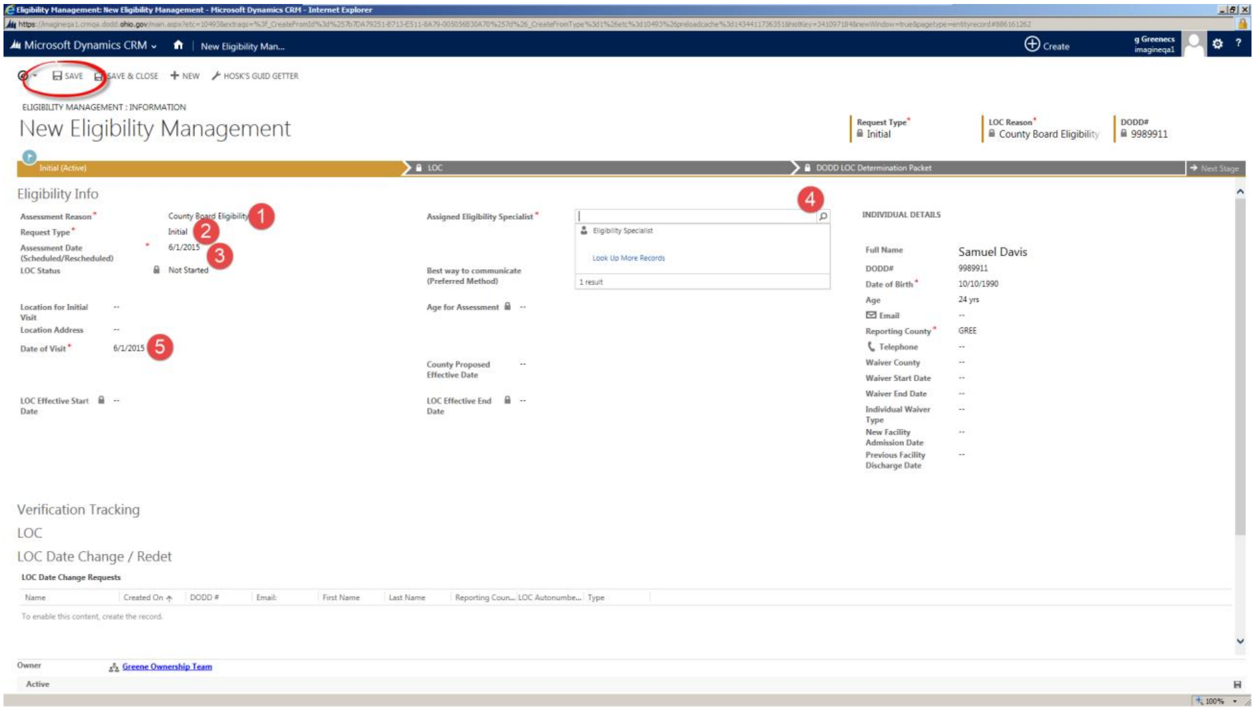


8. Add New Eligibility Management

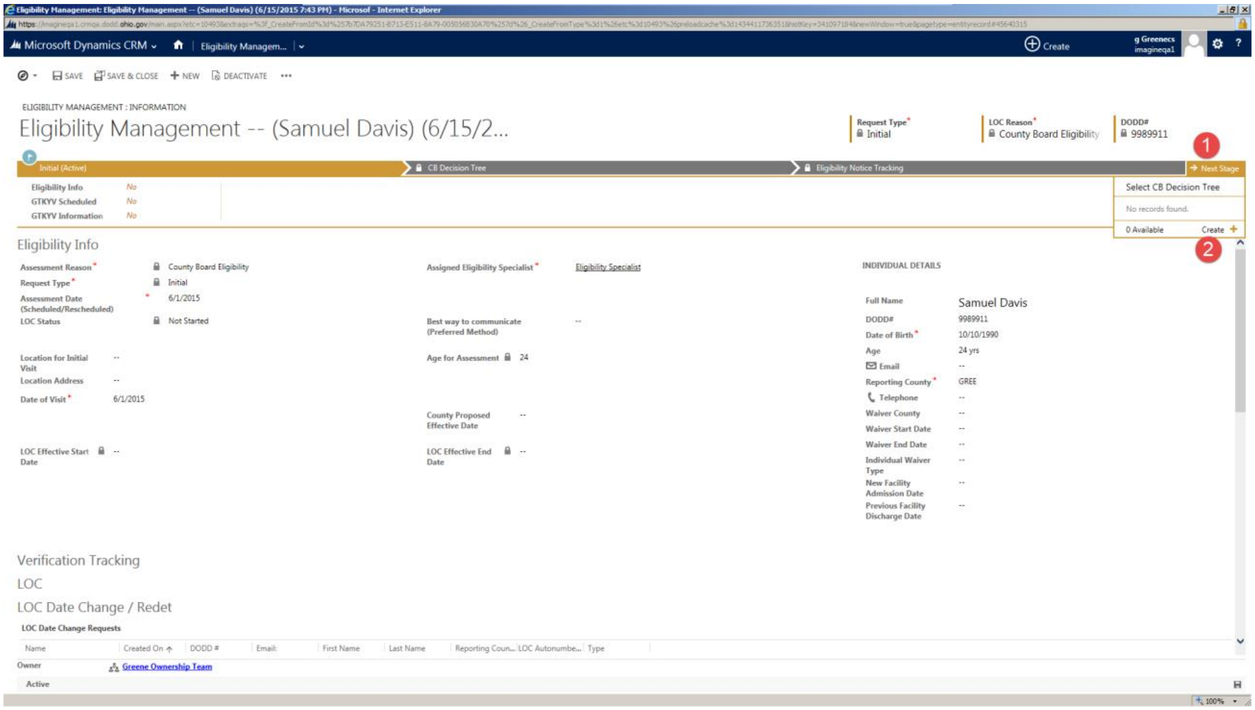


9. Enter required information on **Initial stage** to Save Eligibility management
   1. **Assessment Reason** = select County Board Eligibility
   2. **Assessment Type** = Initial
   3. **Assessment Date =** can be todays or past date – it's when you are got this information from individual
   4. **Assign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

Click on Save button.

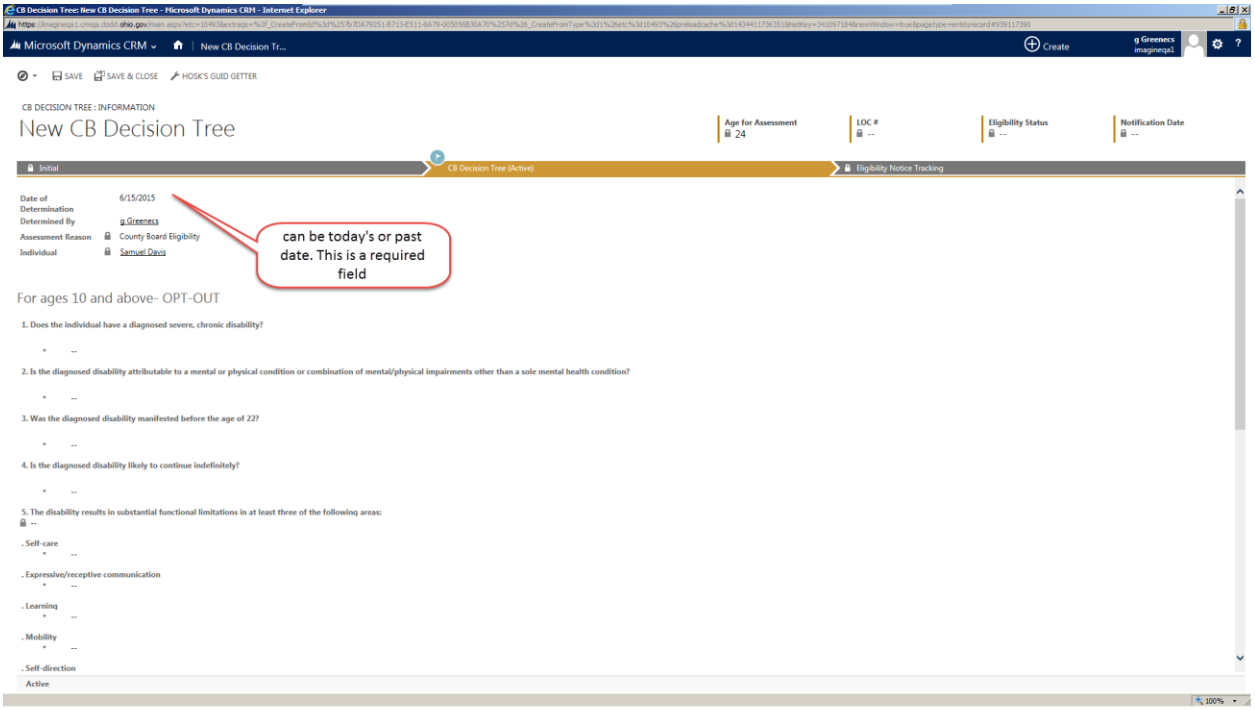


10. Move to **Decision Tree stage →** by clicking on
    1. **“Next Stage”** and
    2. **Create+** on Next Stage

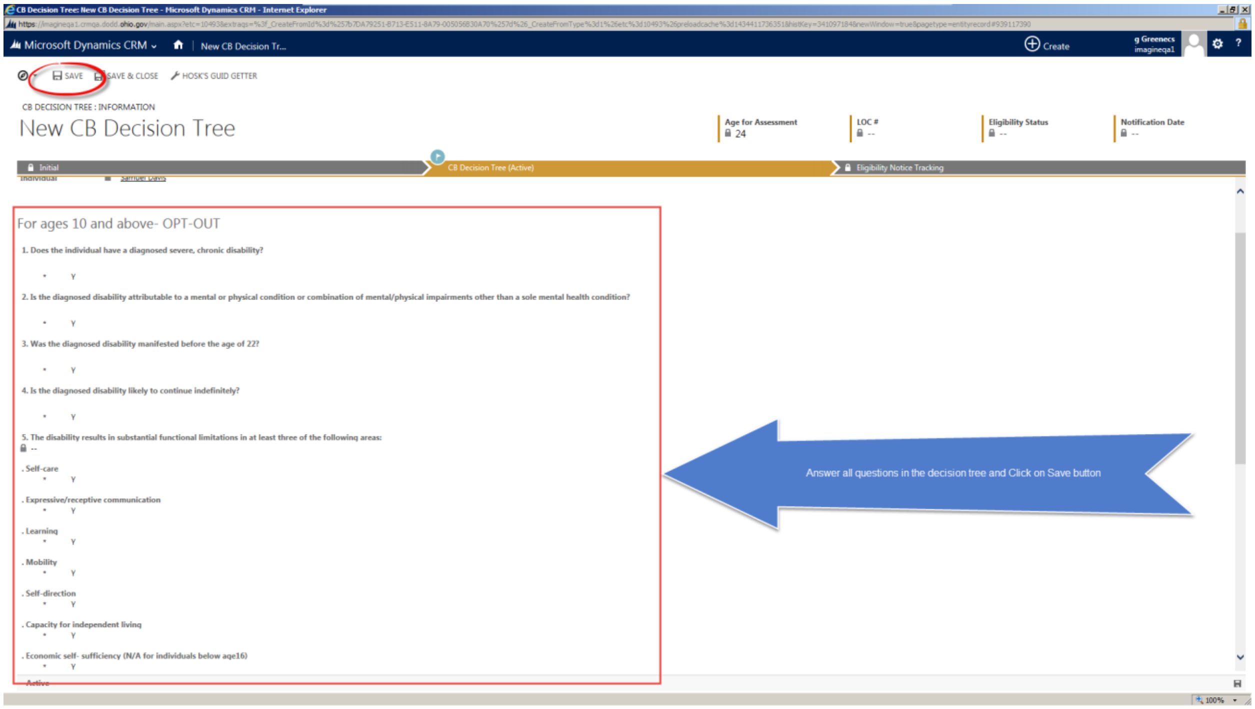


NOTE: The decision tree is available based on the individual’s present age (Birth to 2, 3 to 5, 6 to 9 and 10 and above).

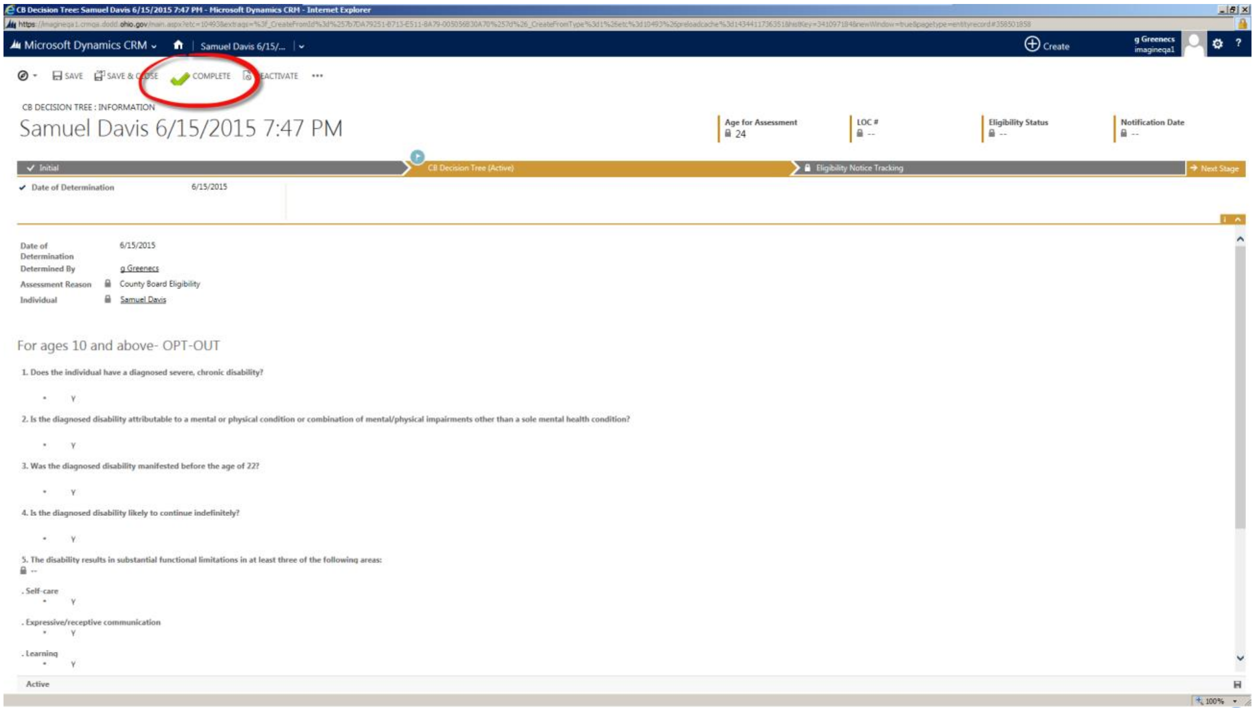
11. Enter the **Date of Determination** – can be todays or past date. This is a required field

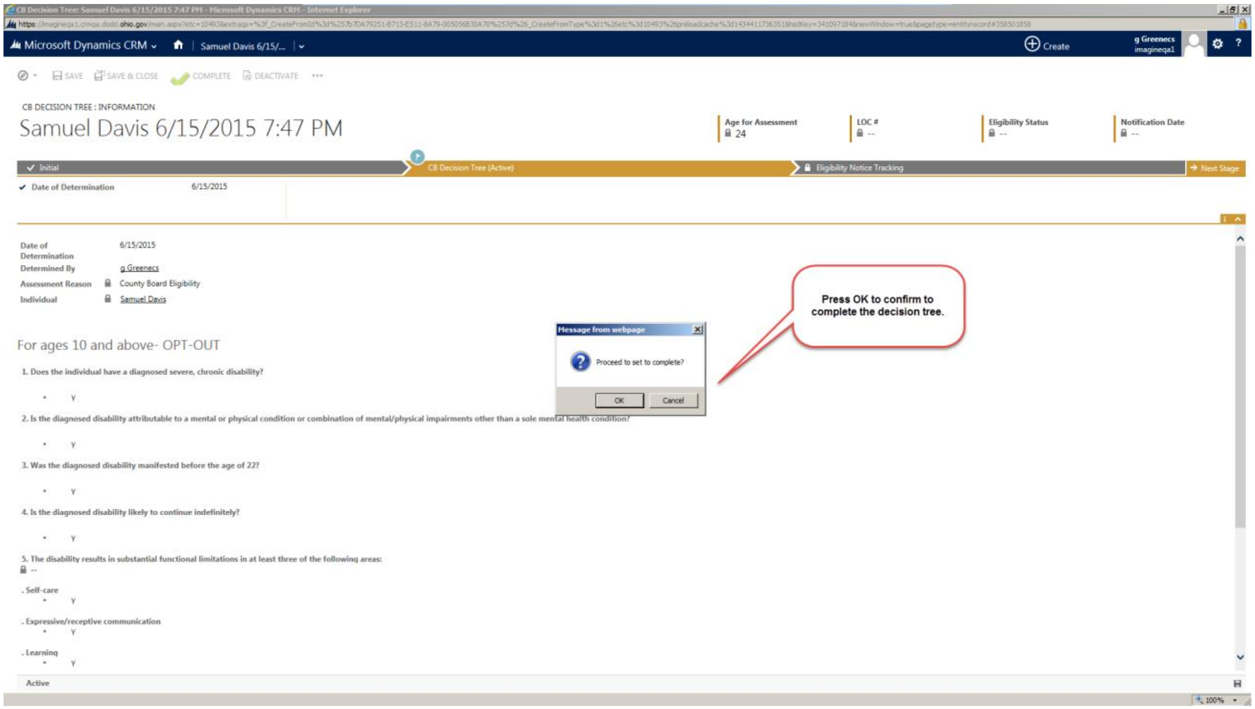


12. Answer all the questions on **Decision Tree**
13. **Save** or **Save and Close** at any time by clicking on the save button or the save and close button from top of this screen

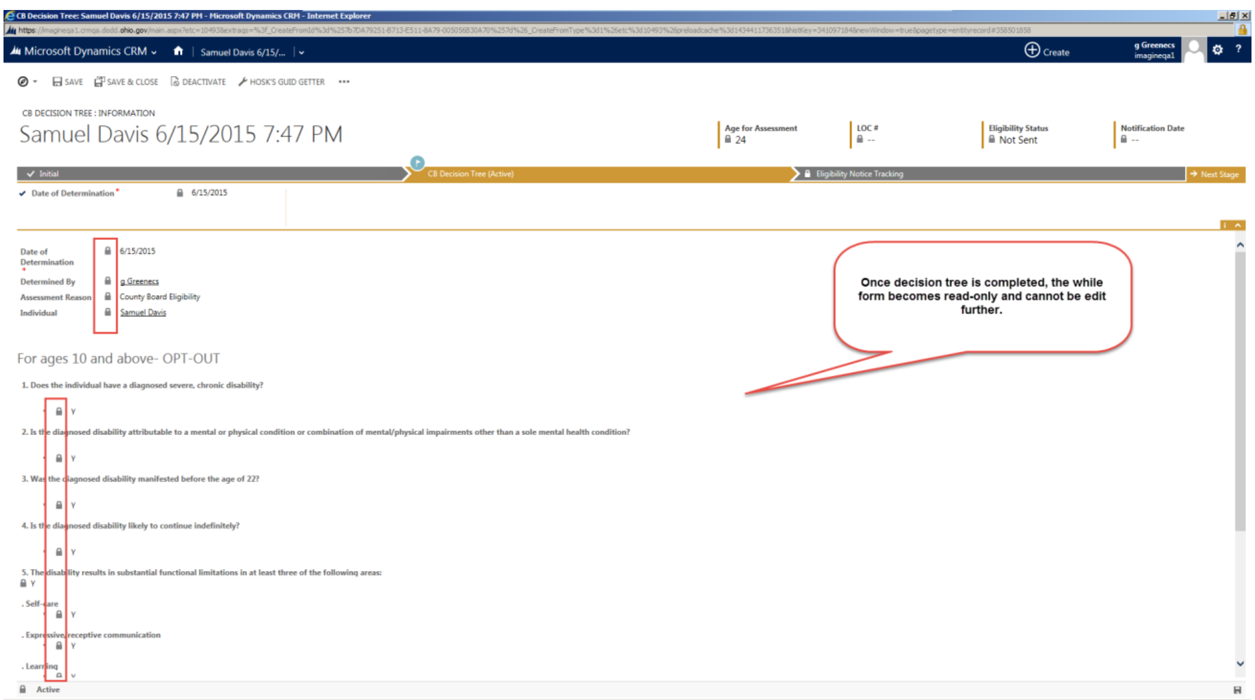


14. Click on the **COMPLETE button** (appears only after Save) from top of this screen

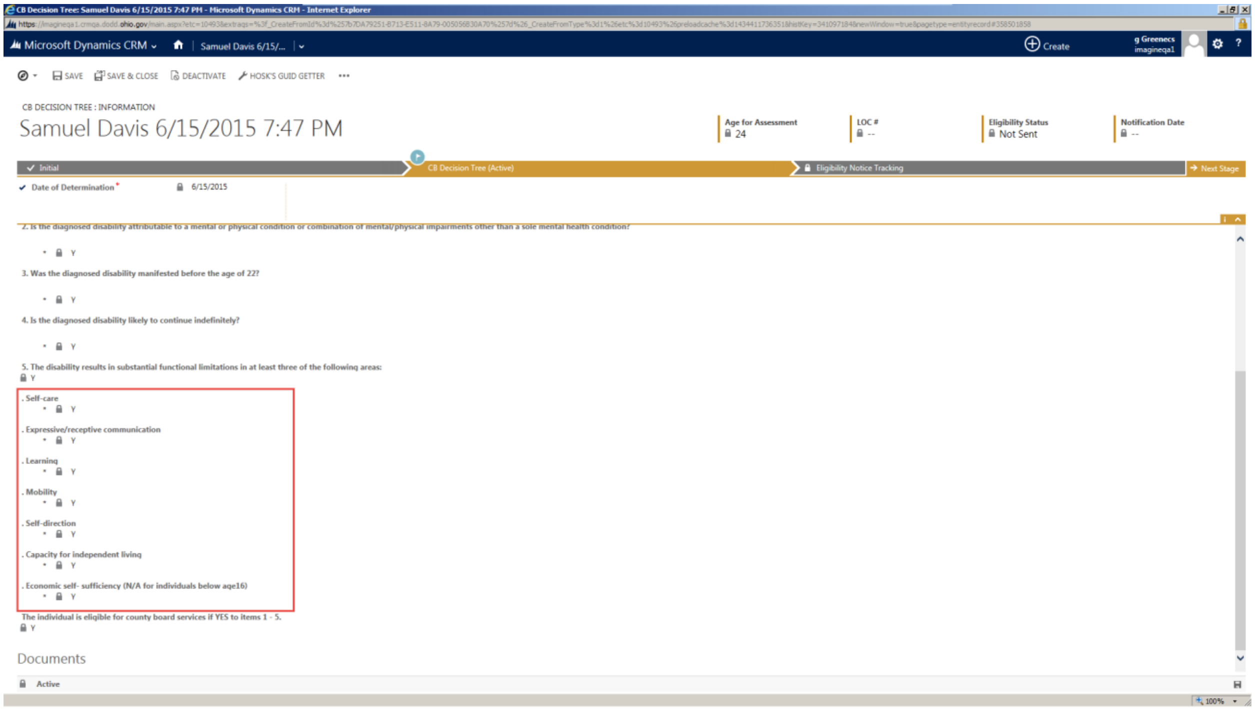




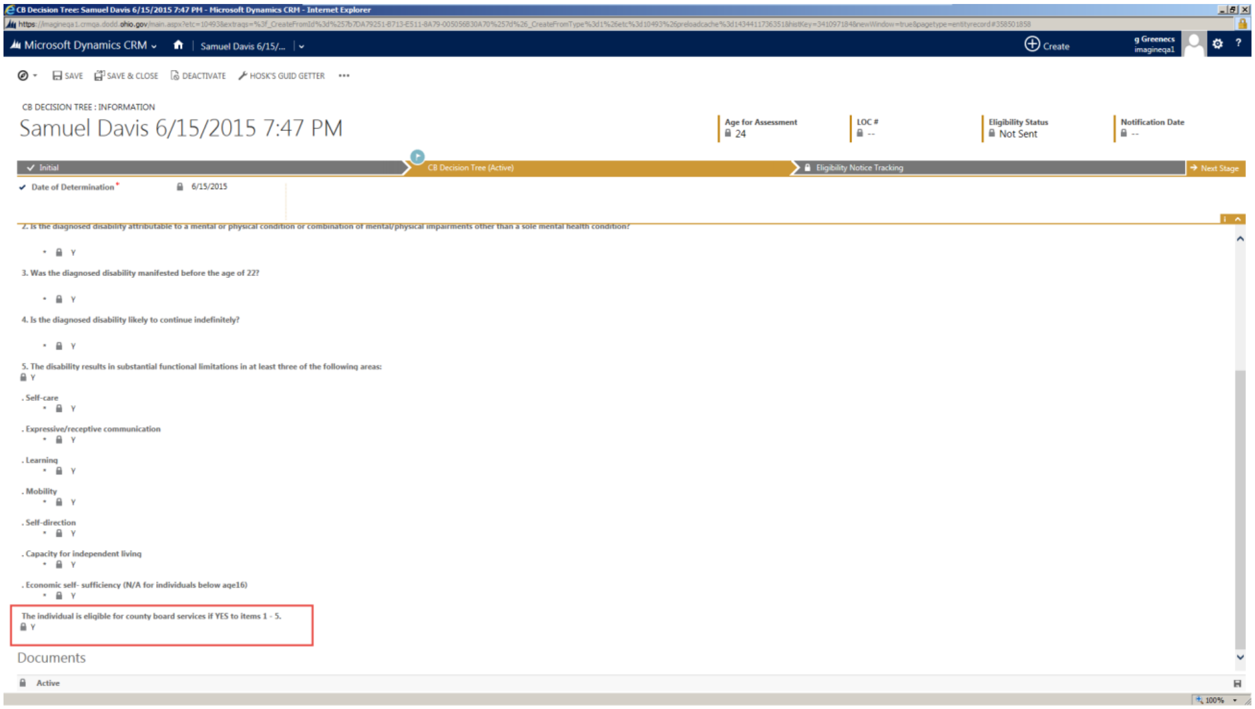
15. Once Decision Tree is Completed→ **Decision Tree becomes read only;** user will see the lock symbol next to all the fields and cannot edit anything now.



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



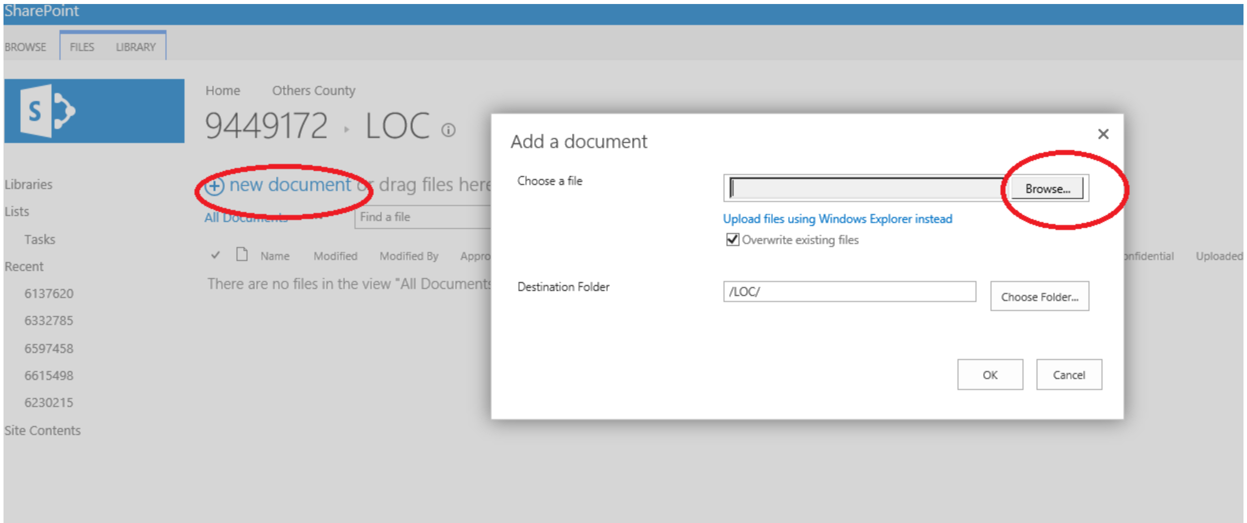
17. User will see the results **(YES/NO) for county board eligibility** once the Decision Tree is completed.



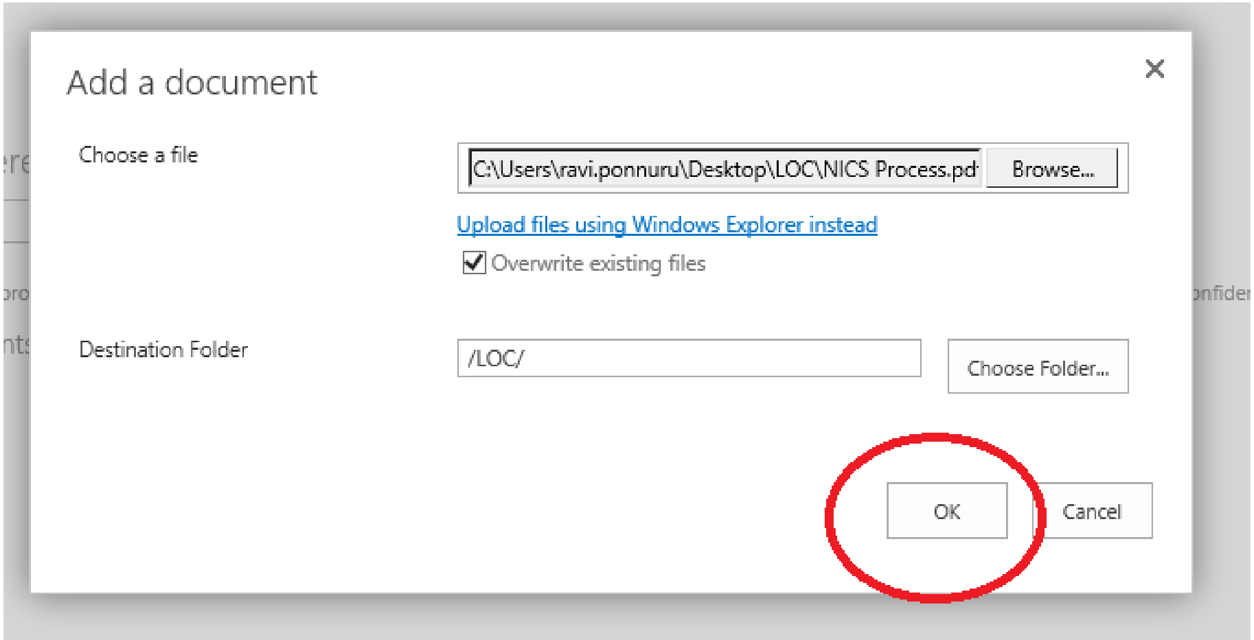
18. You can upload document to SharePoint at any time – before or after Completing the Decision Tree

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

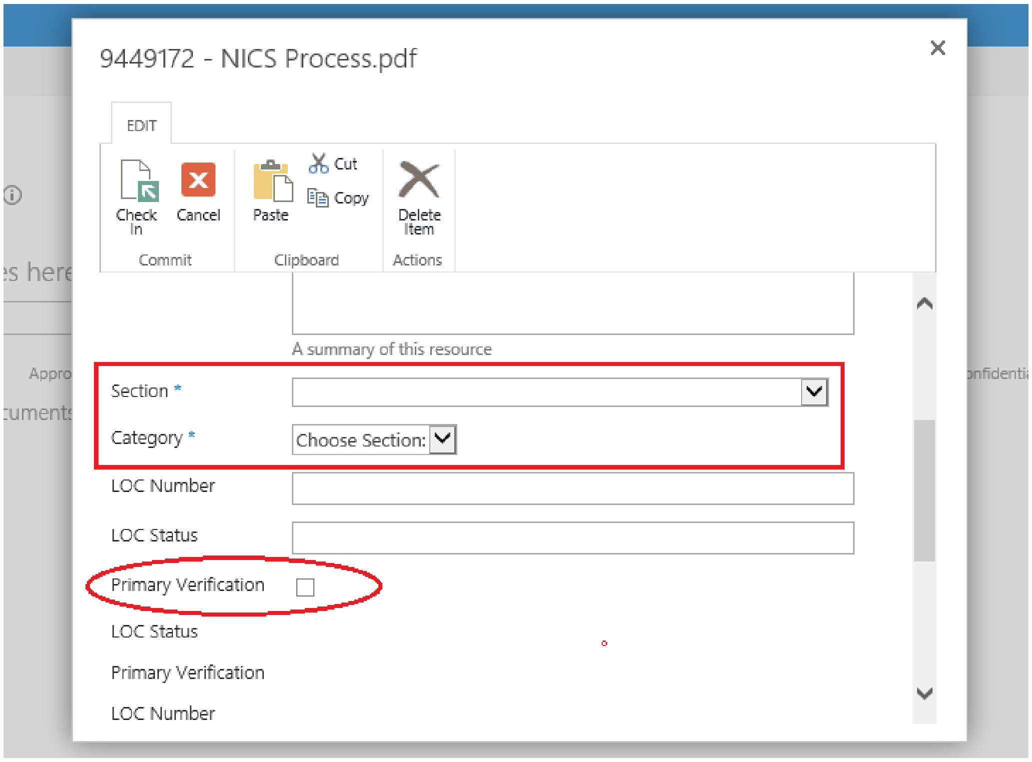
1. Click on **+new document**
2. Click on **chose file**



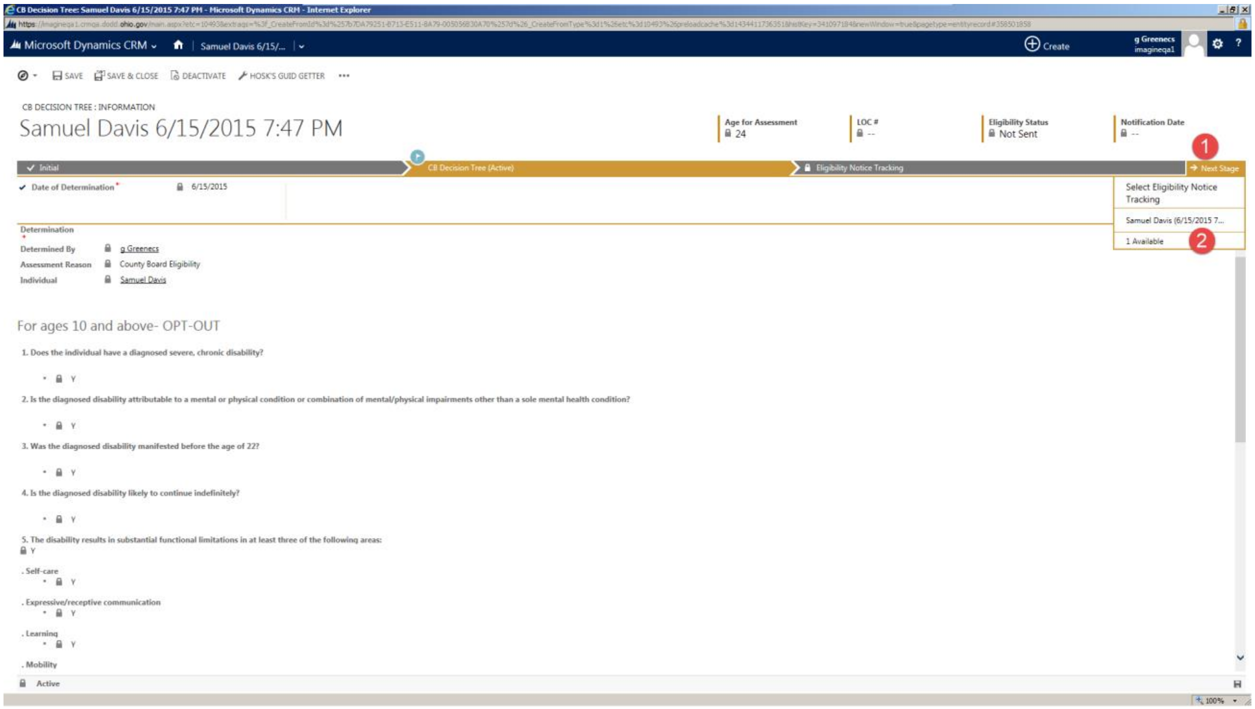
3. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on "Open" once done selecting
4. You will be back on previous screen → **Click on OK**



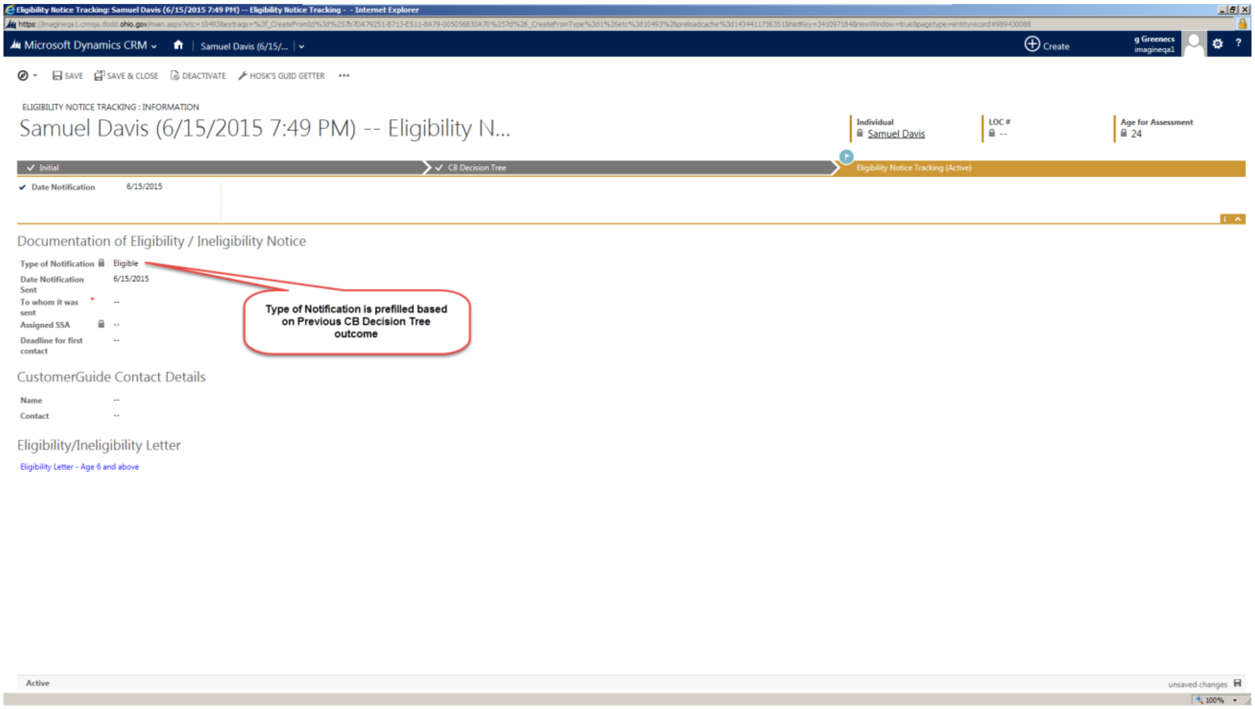
5. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
6. **Add Section →** Select "**LOC**" from the option set
7. **Add Category→** Select the reason for what you are uploading the document → in this case it should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

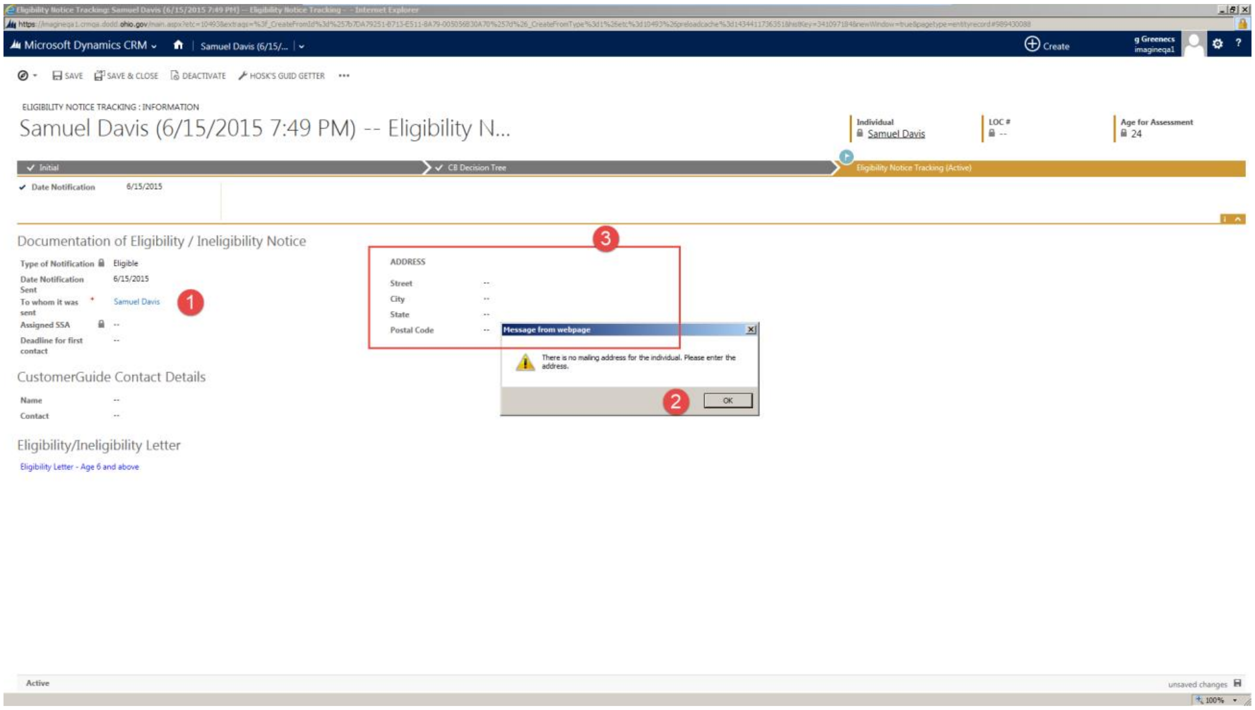
20. Move to **Eligibility Notice Tracking stage →** by clicking
    1. on the **“Next Stage”** and
    2. **Select the Eligibility Notice that is available.**



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)

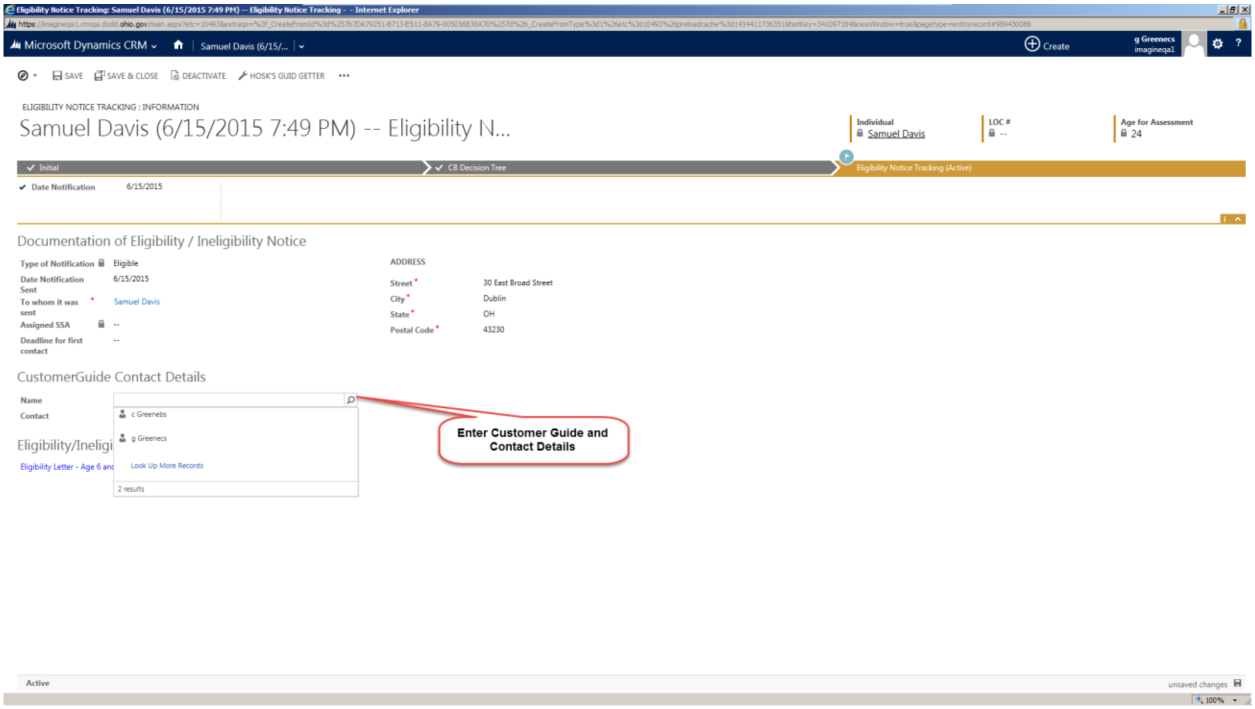


22. Enter **Date notification Sent** – date when you will send this notification to the individual. Not a required field.
23. Fill in **To Whom it was Sent**
    1. By selecting the Individual's name or individual's parent or guardian's name from the option set.

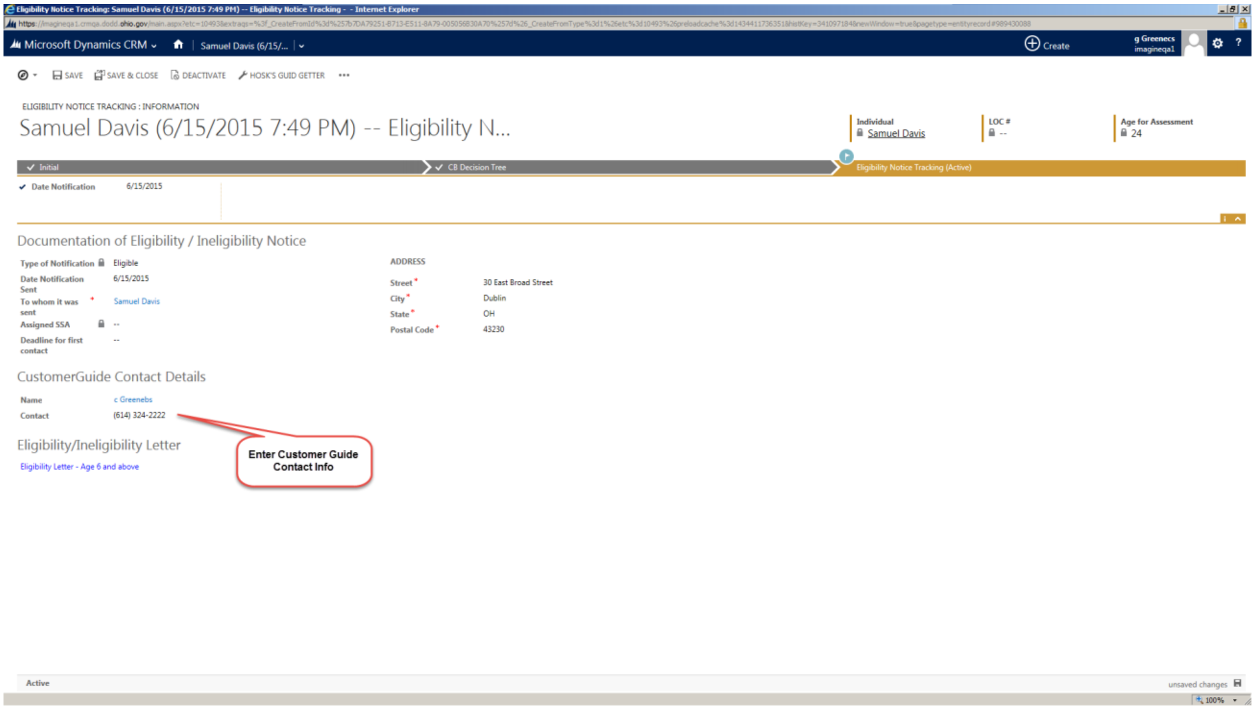


2. If the person to whom the mail has to be sent does not have mailing address, system will prompt you to enter mailing address. Press OK to confirm.
3. **Enter the mailing address** for the individual. Address will be prefilled if individual have a mailing address on his profile

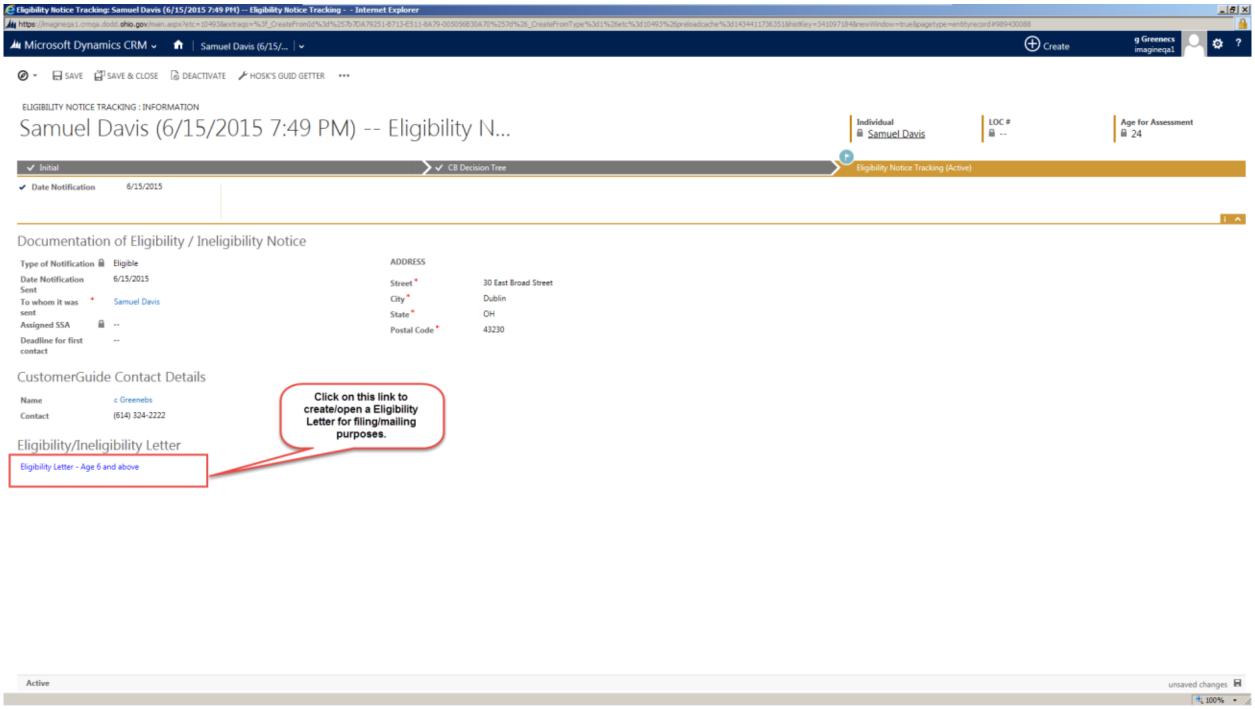
24. **Select a Customer Guide or Eligibility Specialist** by clicking on the magnifying glass - this will show you list of all customer guide and eligibility specialist in your county.



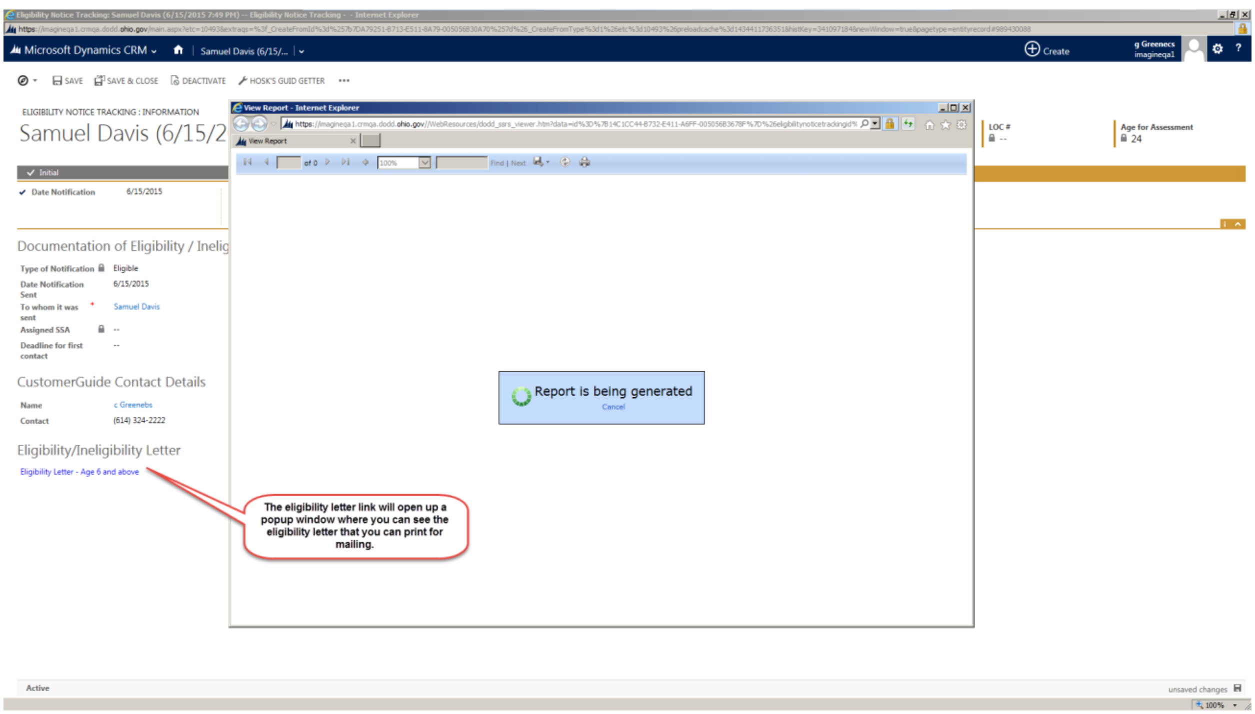
7. Enter Customer Guide’s contact information

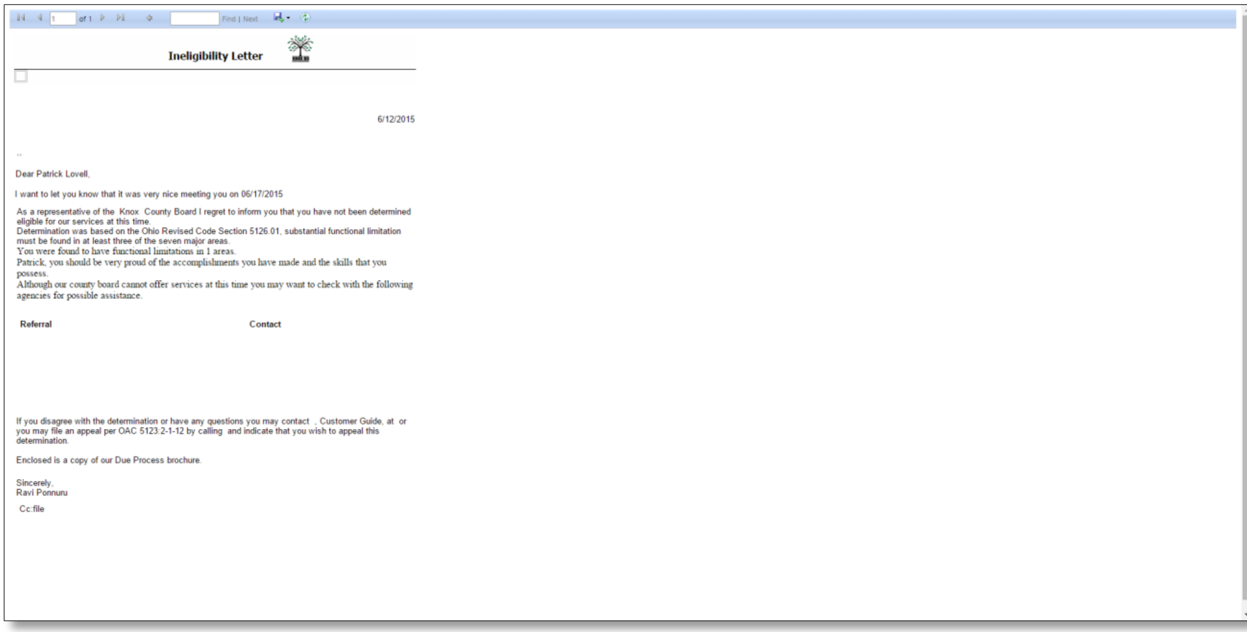


8. Open the **Eligible/Ineligible Notice** by clicking on the link under the Eligibility/Ineligibility Letter Tab



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





Ineligibility Letter

6/12/2015

Dear Patrick Lovell,

I want to let you know that it was very nice meeting you on 06/17/2015

As a representative of the Knox County Board I regret to inform you that you have not been determined eligible for our services at this time.
Determination was based on the Ohio Revised Code Section 5126.01, substantial functional limitation must be found in at least three of the seven major areas.
You were found to have functional limitations in 1 areas.
Patrick, you should be very proud of the accomplishments you have made and the skills that you possess.
Although our county board cannot offer services at this time you may want to check with the following agencies for possible assistance.

Referral	Contact

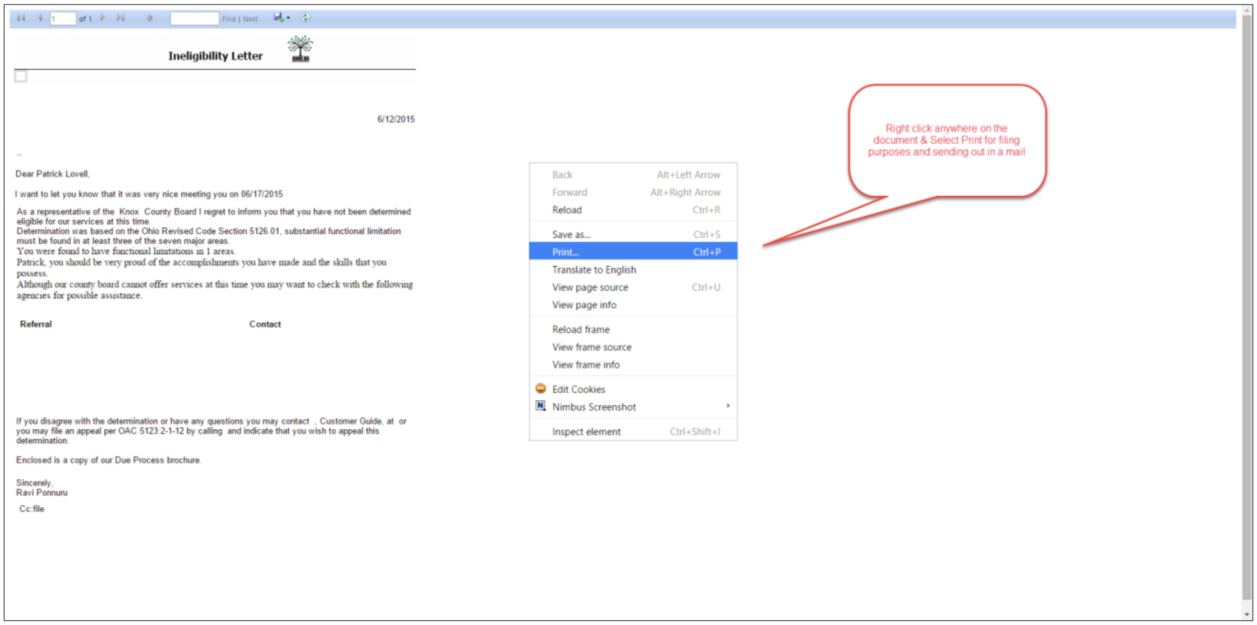
If you disagree with the determination or have any questions you may contact , Customer Guide, at or you may file an appeal per OAC 5123:2-1-12 by calling and indicate that you wish to appeal this determination.

Enclosed is a copy of our Due Process brochure.

Sincerely,
Ravi Ponnuru

Cc:file

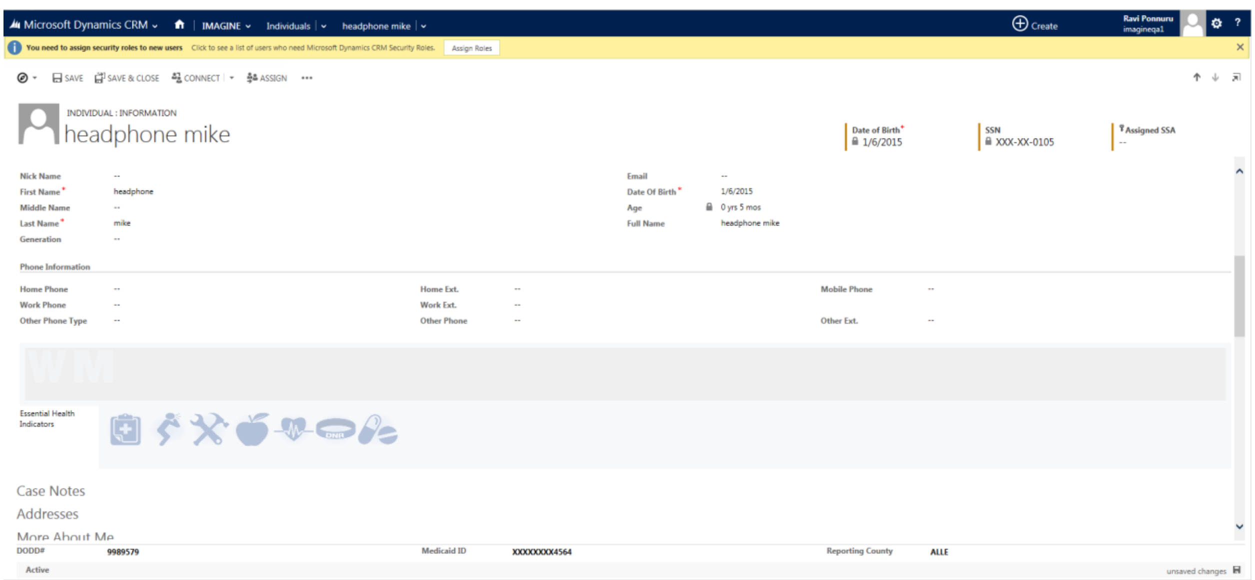
10. Right click on your mouse and select print to **Print the Notice**



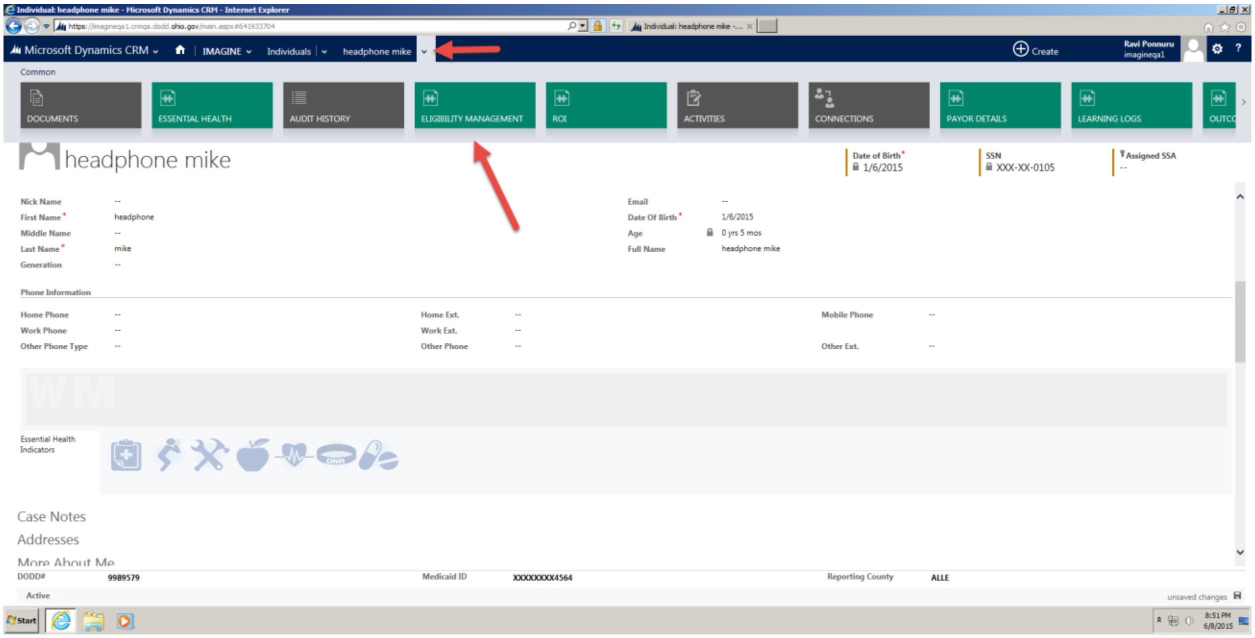
You just completed the County Board eligibility for an individual

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

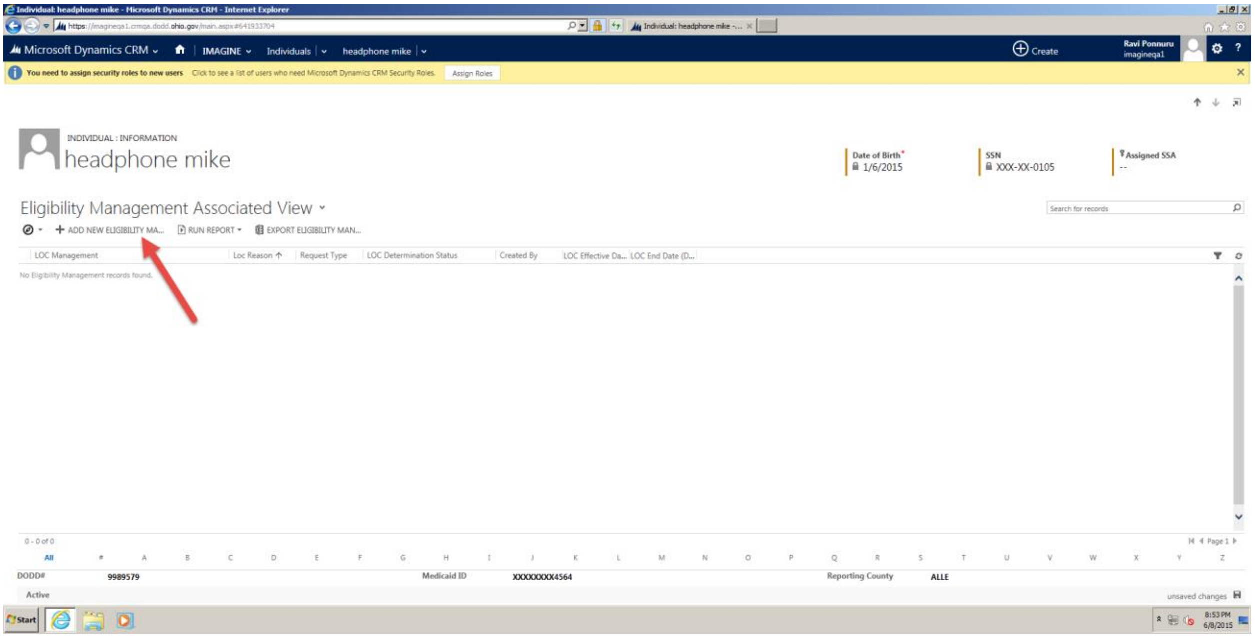
1. To start a LOC for county board eligibility for an Individual, **Search for individual** by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box.
3. **Individual record will show up** if individual exist in your county
4. Double click on individual record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



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

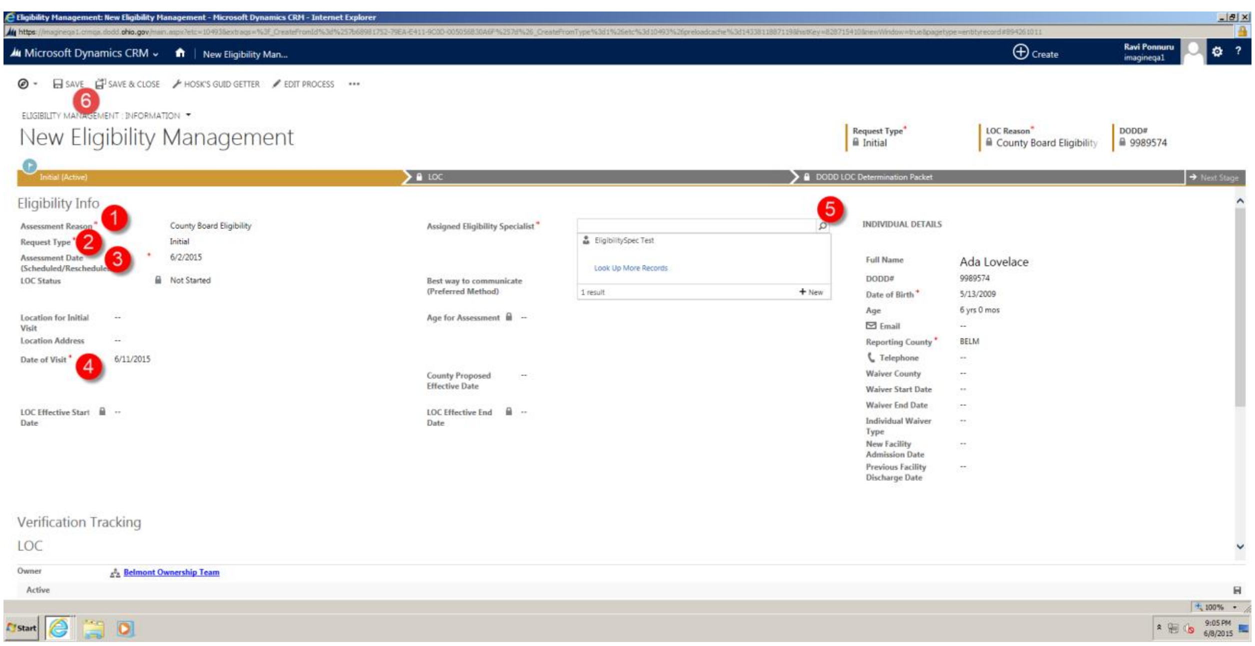


7. User will land on **Eligibility Management View Page**—you can see all the eligibilities done for that individual
8. **Add New Eligibility Management**



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

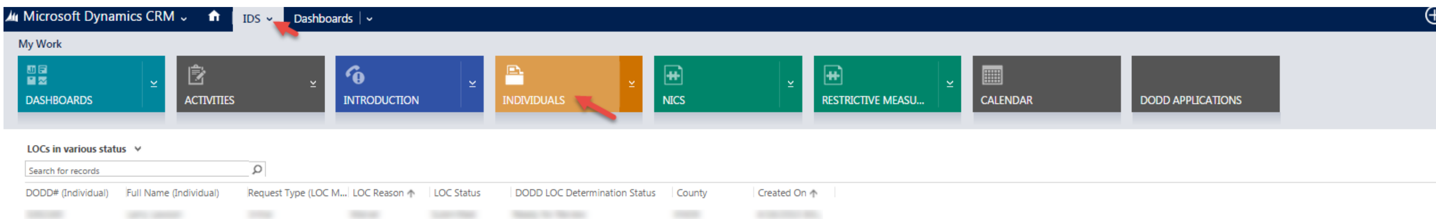
1. **Assessment Reason** = select County Board Eligibility
2. **Assessment Type** = Initial
3. **Assessment Date =** can be todays or past date – it's when you are got this information from individual
4. **Date of Visit =** can be todays or past date – it's when you met with individual to capture this 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



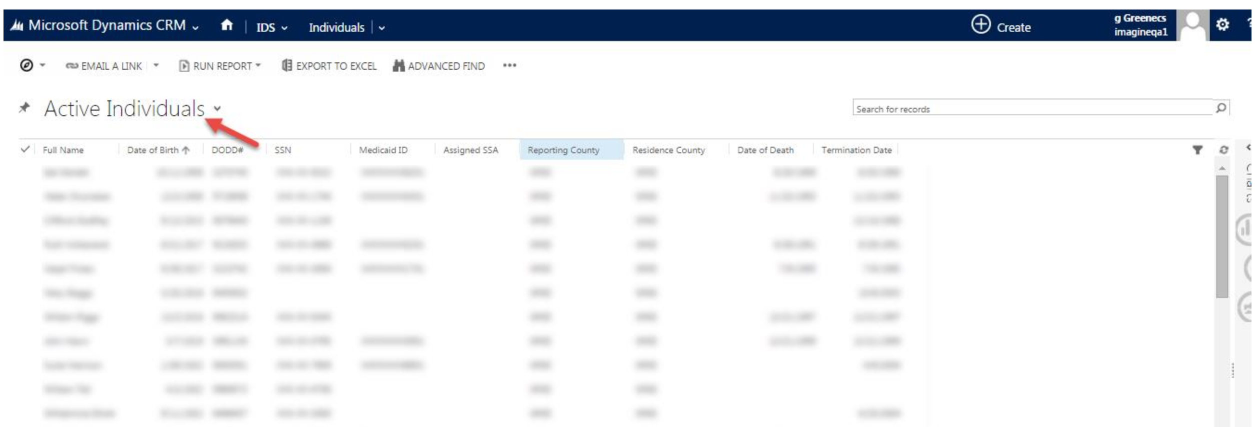
10. Cannot Move to **LOC stage** **(has to be an evaluator)**

LOC for Waiver Eligibility

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

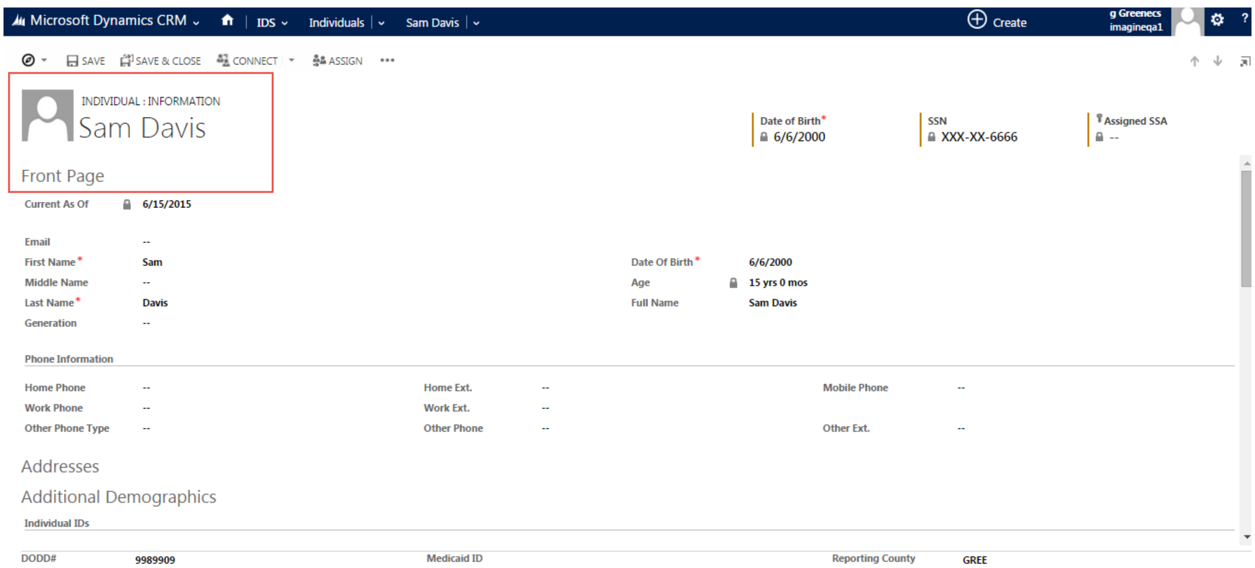


2. You will see list of **Active Individuals in your county**

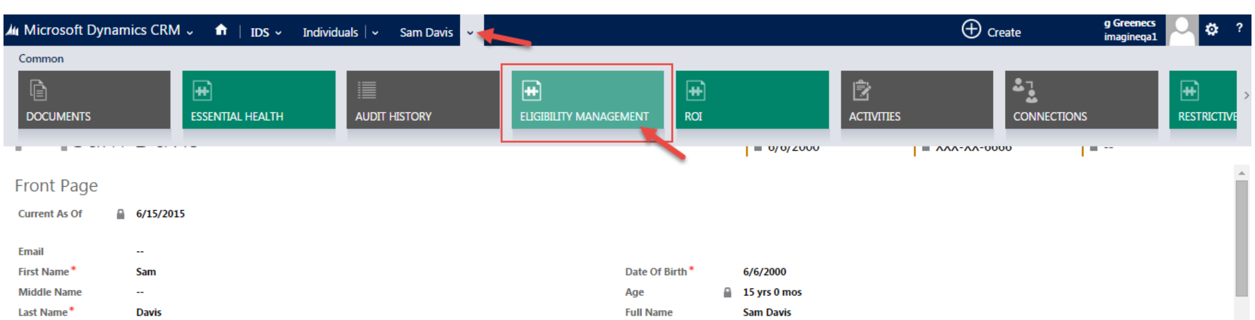


3. **Search for individual** by typing name in search box
4. Hit **Enter** or click on the magnifying glass next to search box
5. **Individual record will show up** if individual exist in your county

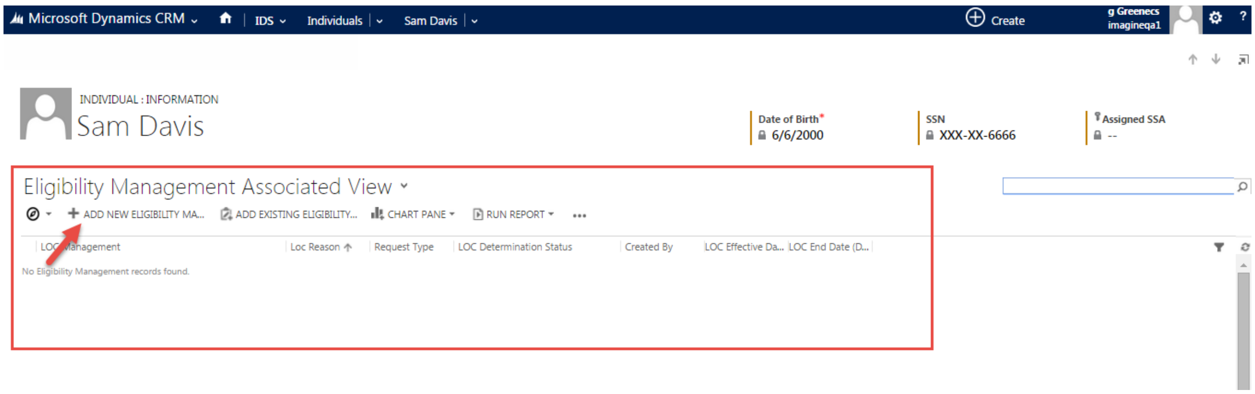
6. Double click on individual record to open individual's record
7. User will land on **Individual front page**



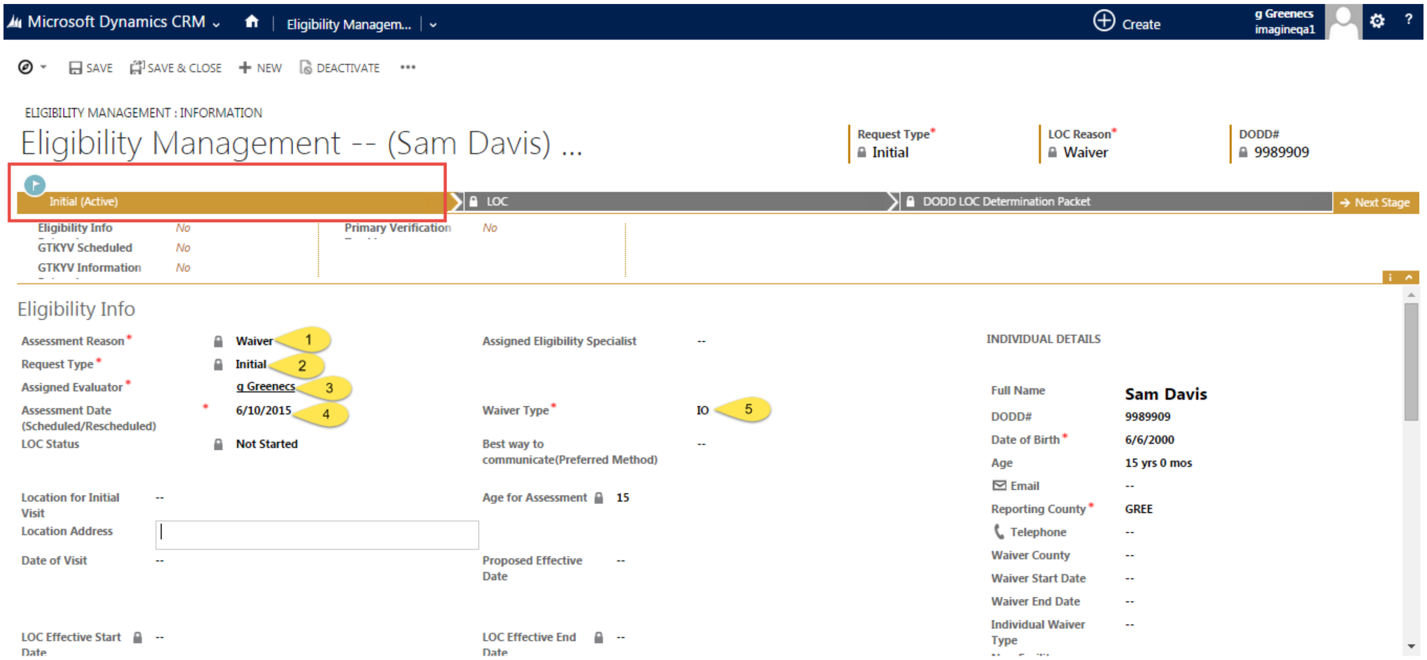
8. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



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



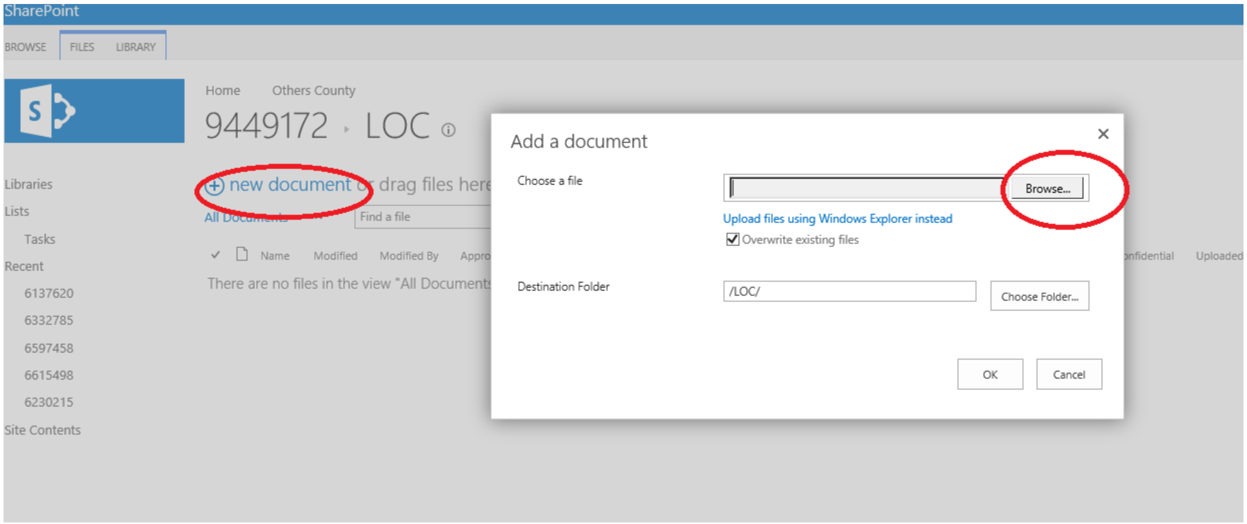
11. Enter required information on **Initial stage** to Save Eligibility management
    1. **Assessment Reason** = select Waiver
    2. **Assessment Type** = Initial
    3. **Assign Evaluator** = click on the magnifying and select the evaluator who will complete the LOC for this individual. You can assign yourself if you will do it
    4. **Assessment Date =** can be todays 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
GTKYV Scheduled No
GTKYV Information No
Primary Verification No
Eligibility Info
Assessment Reason* Waiver 1
Request Type* Initial 2
Assigned Evaluator* g Greenecs 3
Assessment Date (Scheduled/Rescheduled)* 6/10/2015 4
LOC Status Not Started
Location for Initial Visit --
Location Address
Date of Visit --
LOC Effective Start Date --
Assigned Eligibility Specialist --
Waiver Type* IO 5
Best way to communicate(Preferred Method) --
Age for Assessment 15
Proposed Effective Date --
LOC Effective End Date --
INDIVIDUAL DETAILS
Full Name Sam Davis
DODD# 9989909
Date of Birth* 6/6/2000
Age 15 yrs 0 mos
Email --
Reporting County* GREE
Telephone --
Waiver County --
Waiver Start Date --
Waiver End Date --
Individual Waiver Type --

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

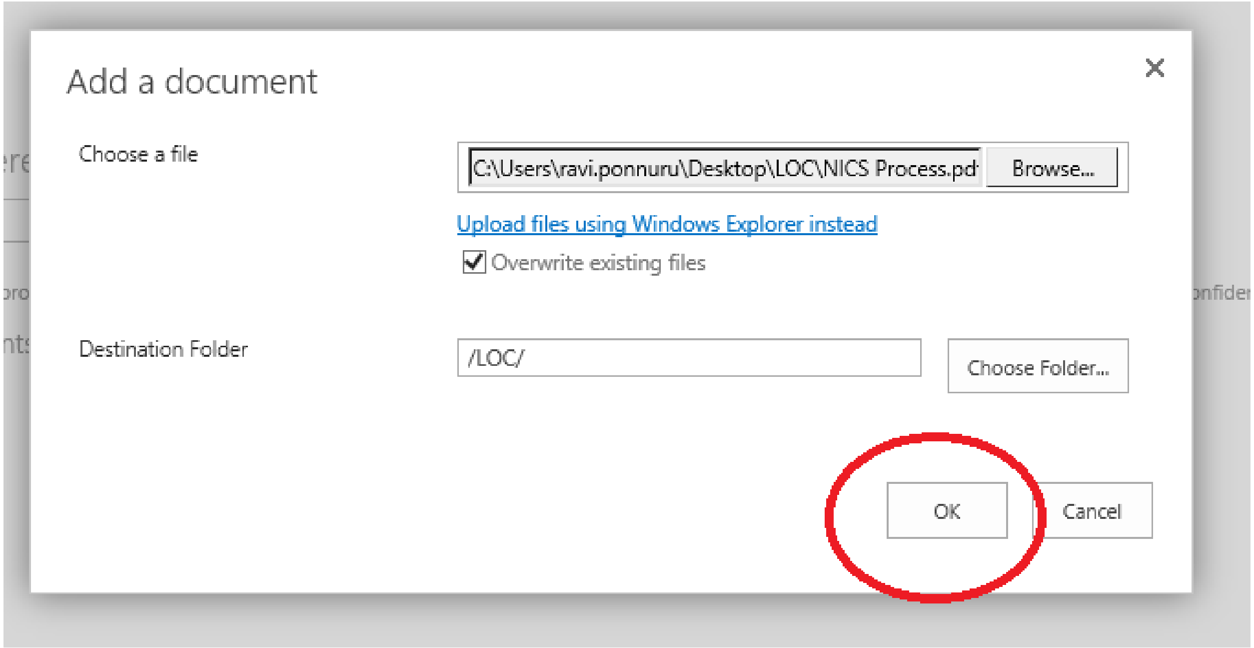
10. Click on **+new document**

11. Click on **chose file**

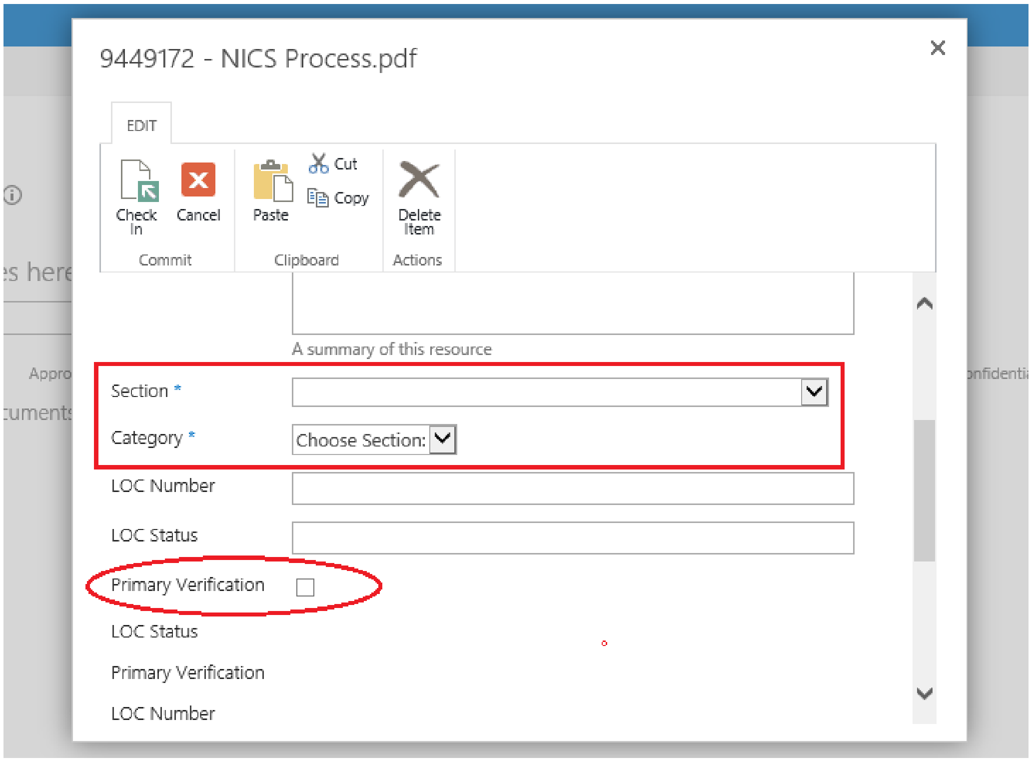


12. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on "Open" once done selecting

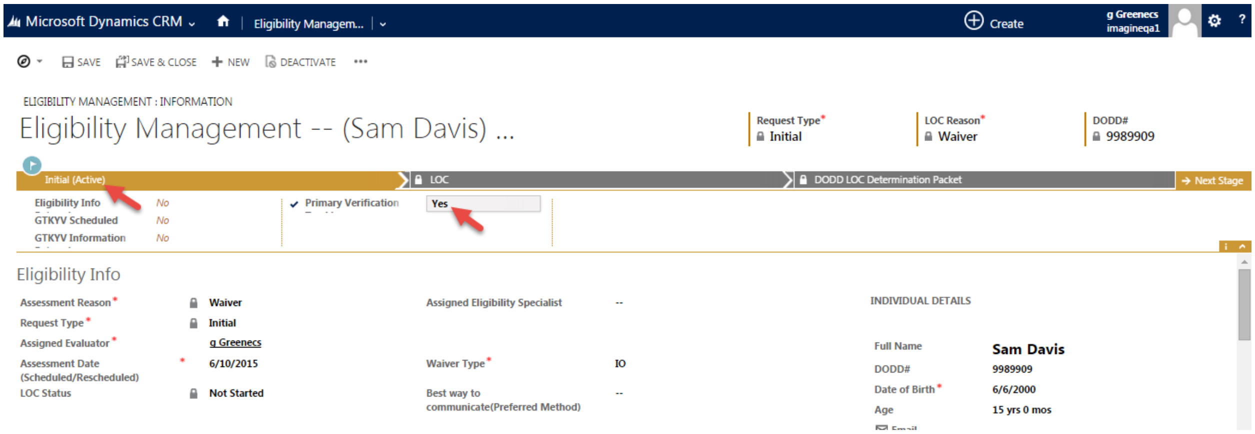
13. You will be back on previous screen → **Click on OK**



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

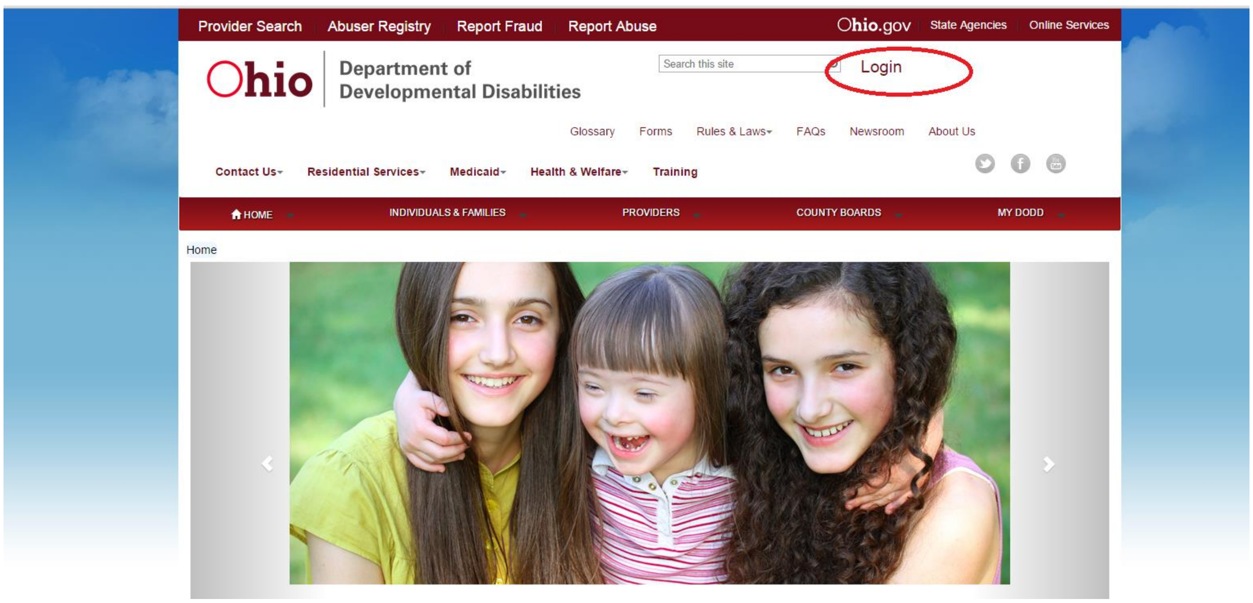


14. Cannot Move to **LOC stage** **(has to be an evaluator)**

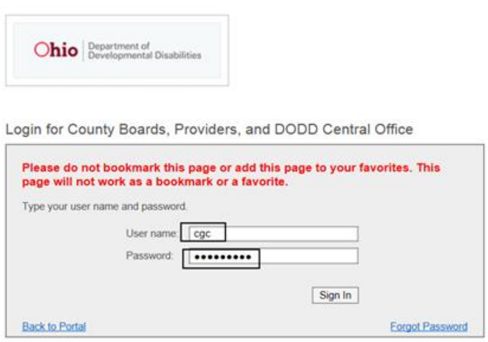
2. Eligibility Specialist (IDS Edit)

Login

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

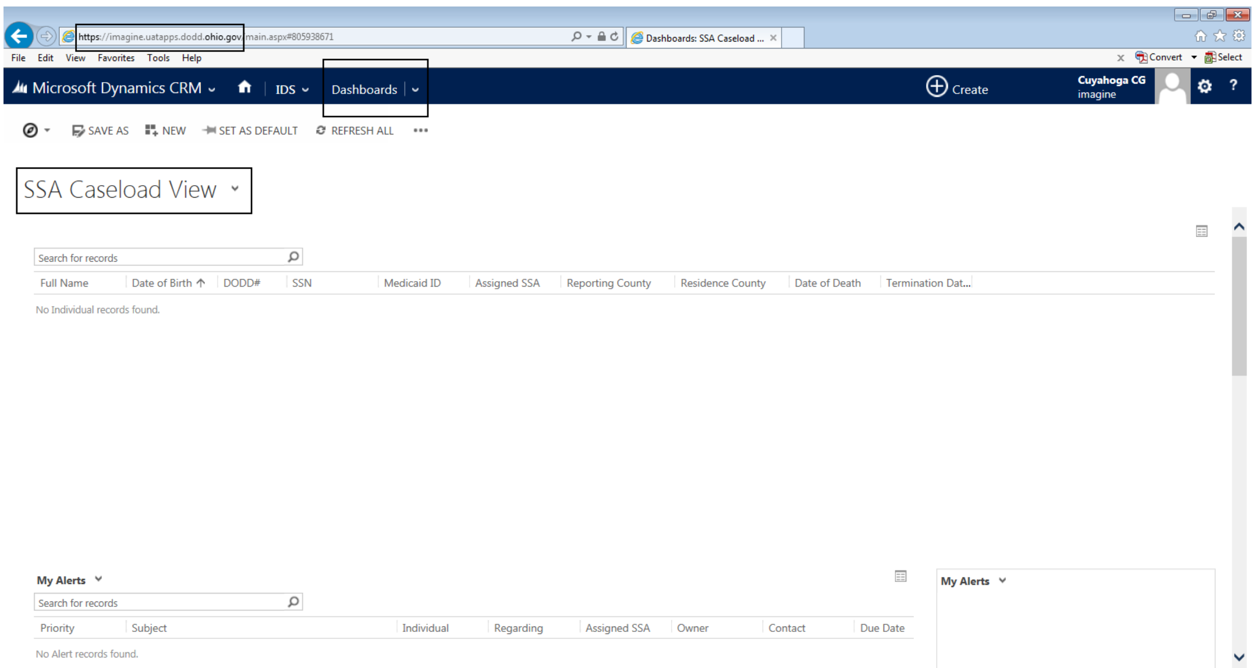


3. **Enter** your **User Name** and **Password**
   (Role: Eligibility Specialist)



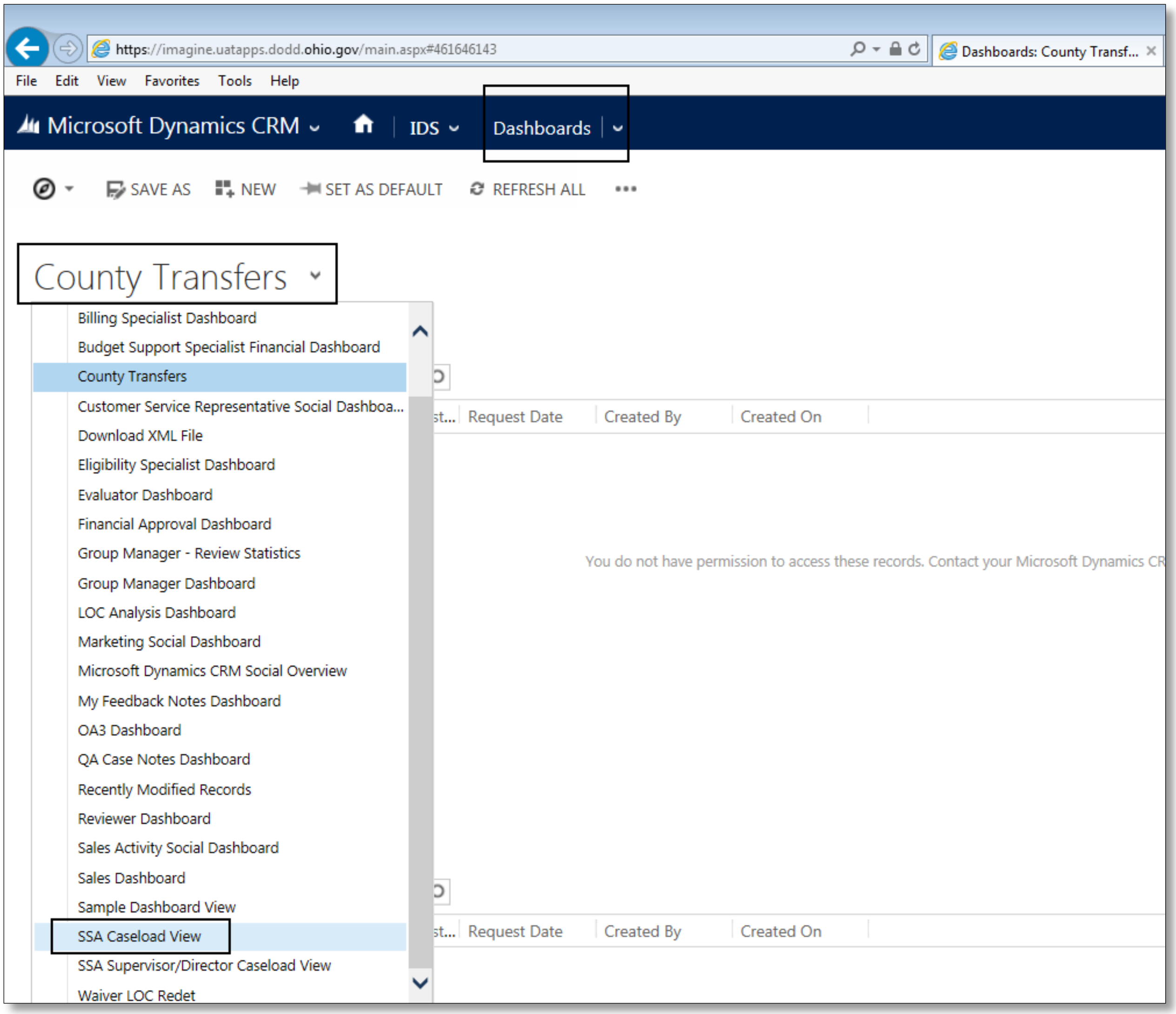
Dashboard

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

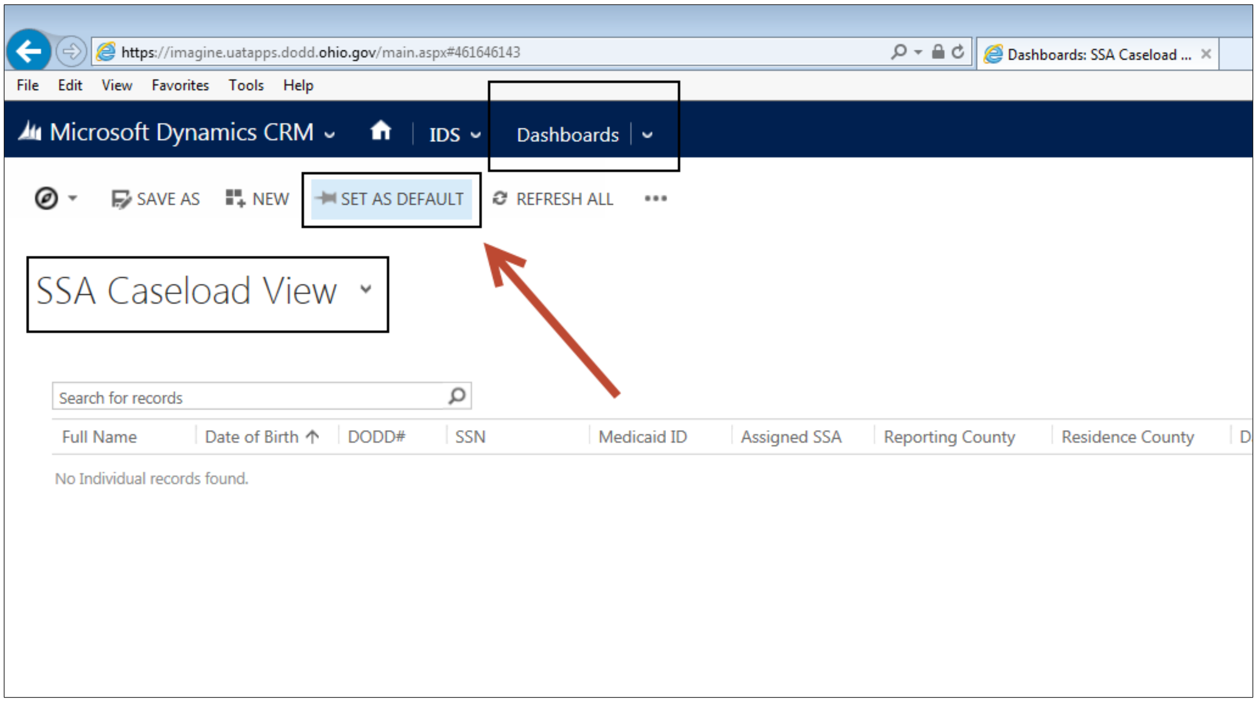


5. If you don't see the SSA Caseload View:

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


https://imagine.uatapps.dodd.ohio.gov/main.aspx#461646143
Dashboards: County Transf...
File Edit View Favorites Tools Help
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

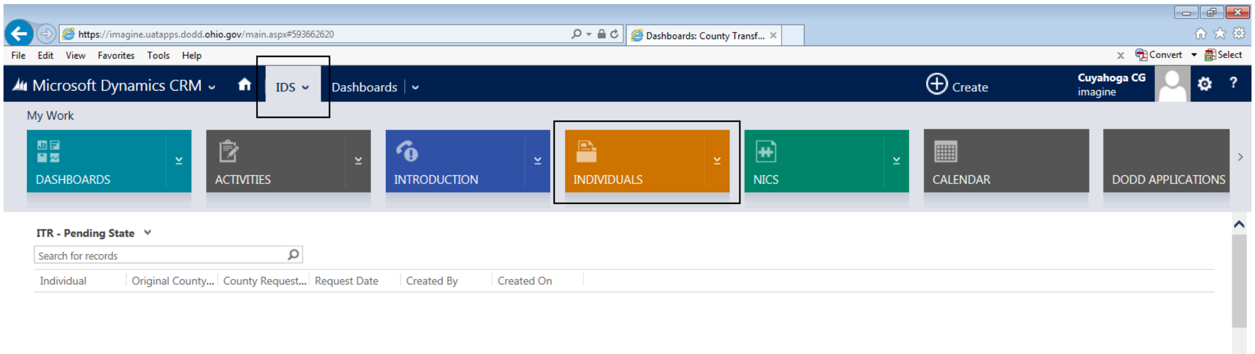
4. Finally, click on "Set as Default" on top of this dashboard page if you wish to pin this as your **Home** landing page.



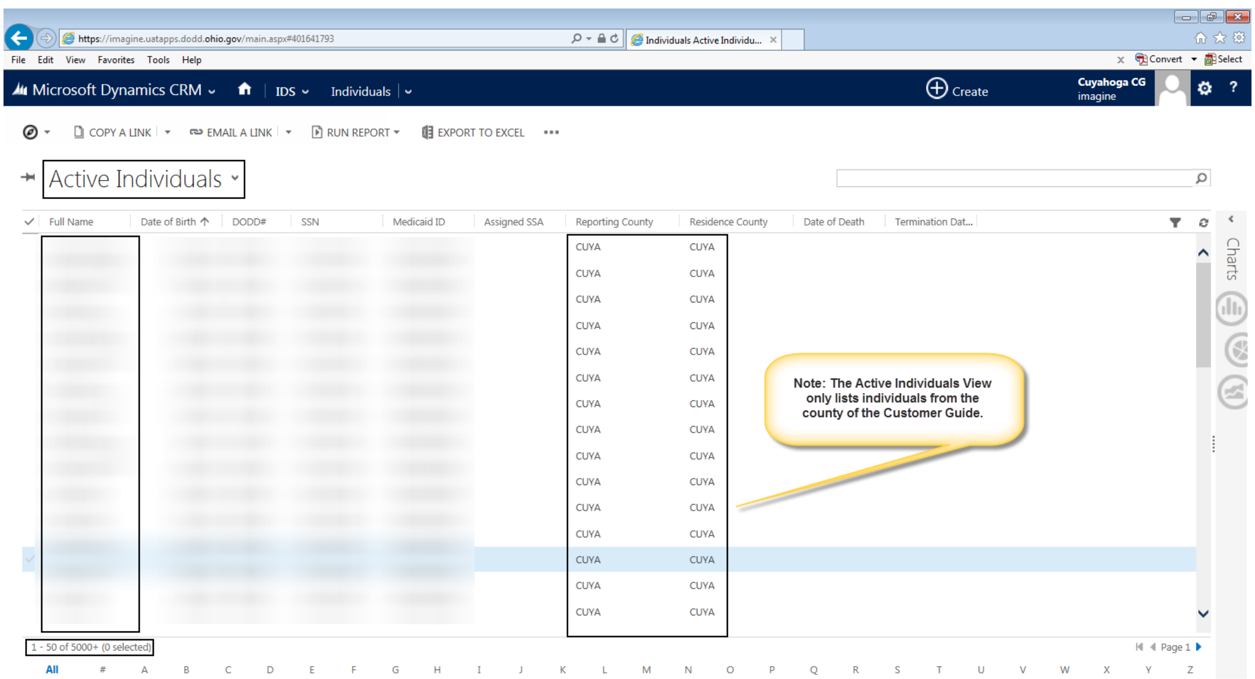
Access Individual

6. To access list of individuals in your county:

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



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



Search Individual

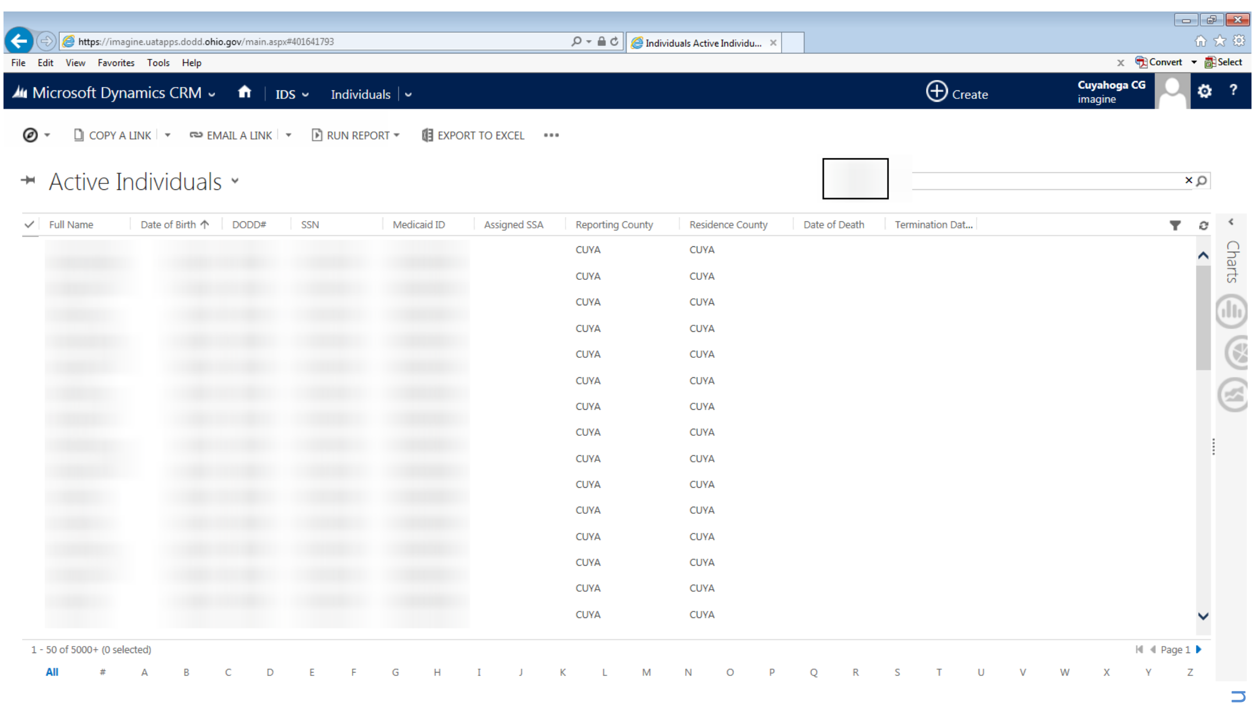
7. Follow these steps to Individual Search

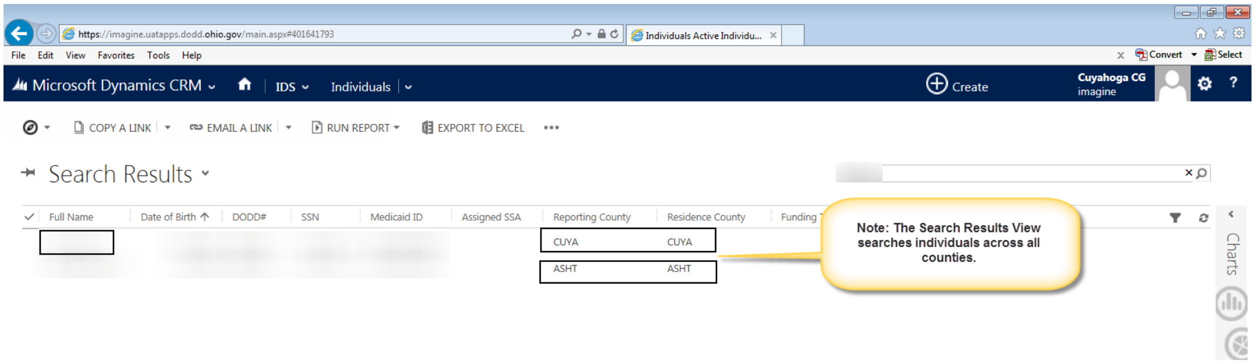
1. Search for individual by entering search criteria in the search box. Fields available to search on include: First Name, Last Name, Full Name (Ex. Jonathan Dawkins), Date of Birth, Medicaid #, SSN and DODD#.

Note: As an Eligibility Specialist 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.



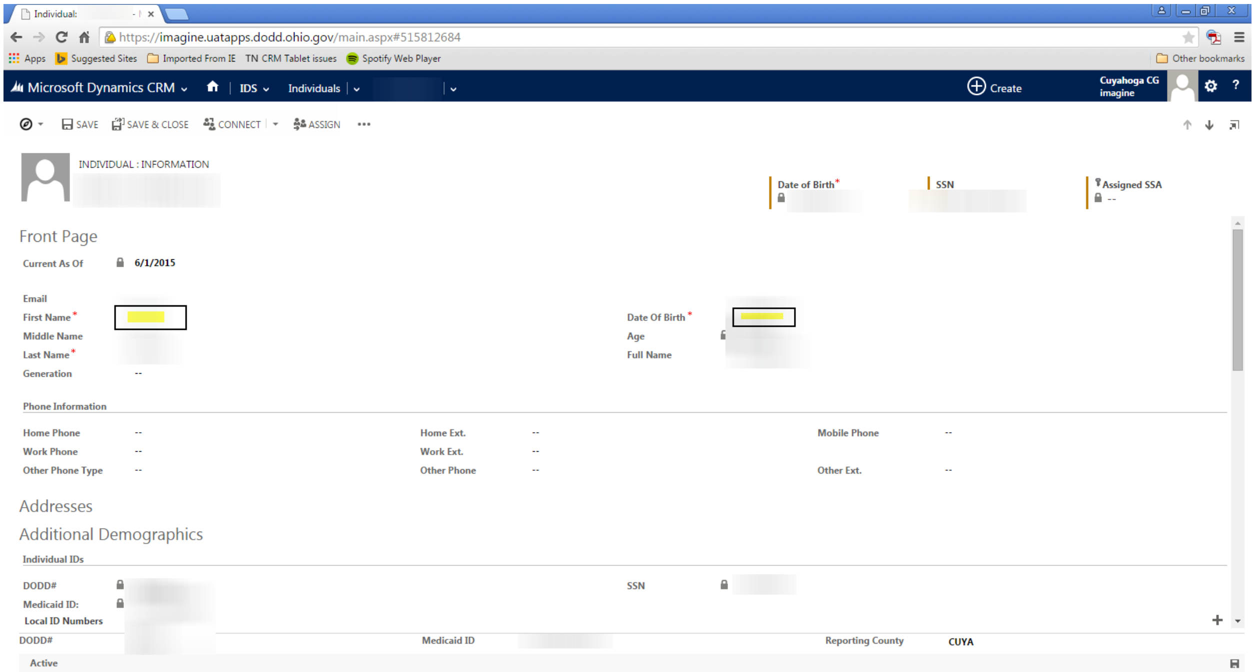


Edit Individual's Information

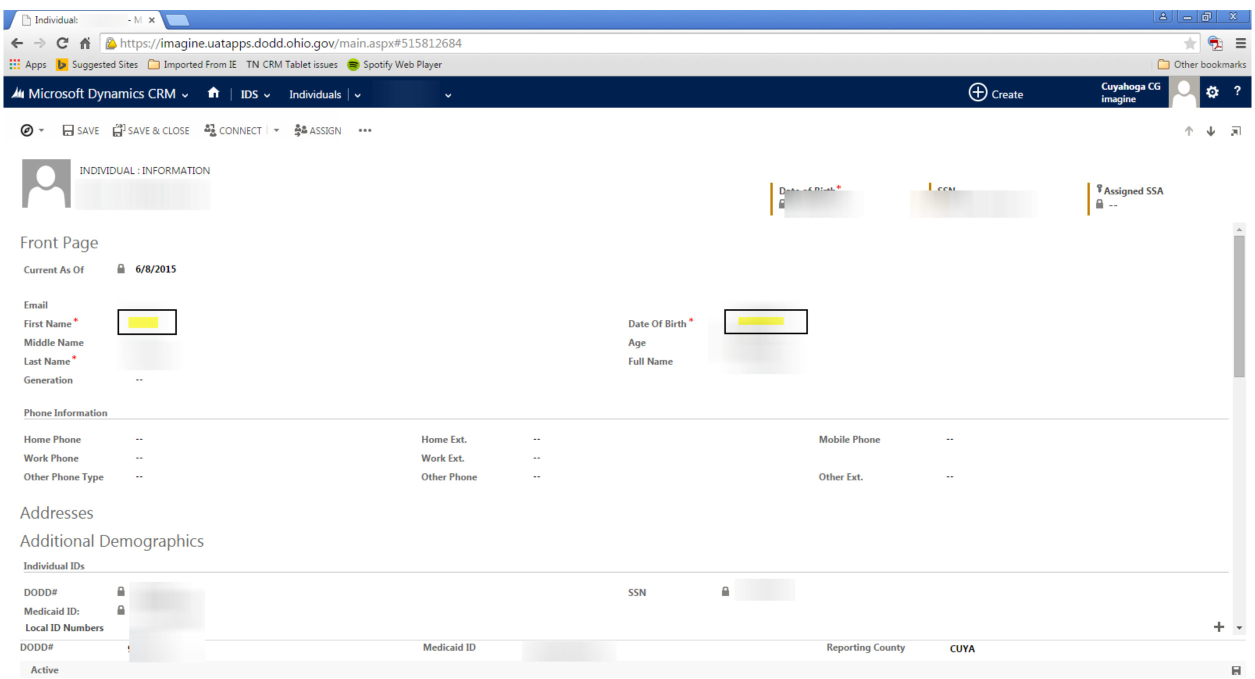
8. Edit an Individual's Front Page information

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:



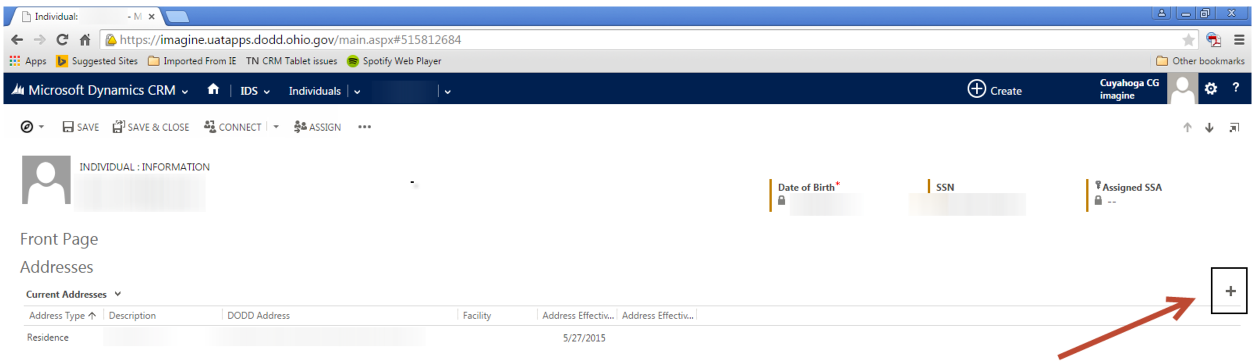
After edit:



Add Address

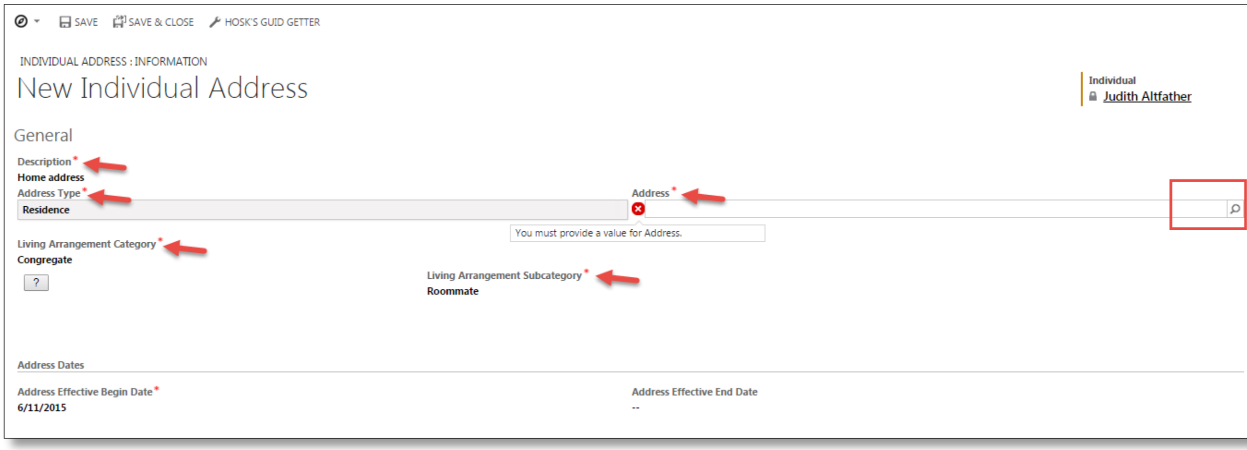
9. Add an Individual's Address information

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

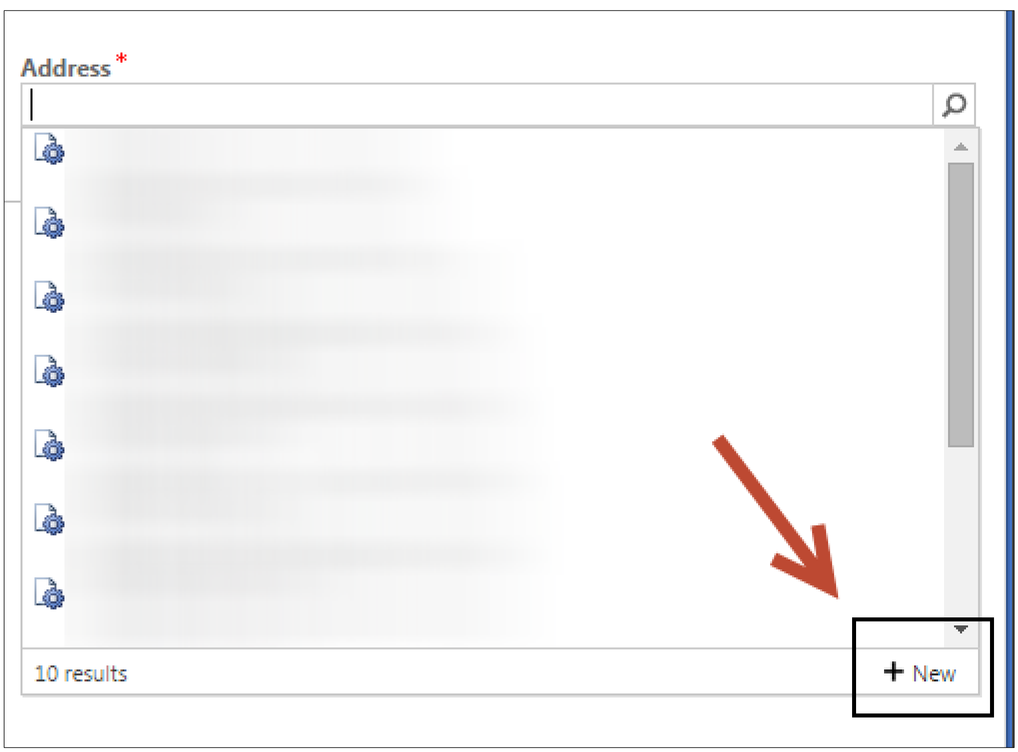


3. Description, Address Type, Address and Address Effective Begin date are all required fields denoted with a red asterisk (*). Clicking the magnifying glass will allow you to add a new address.

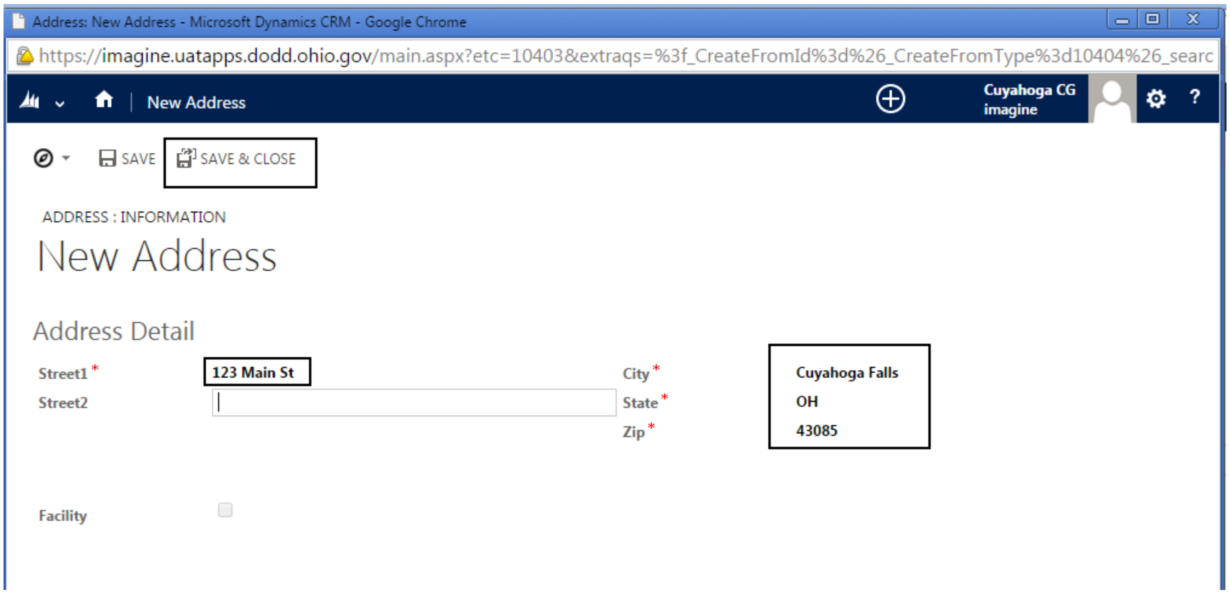
   Note: If you select Residence as Address type, you need to select Living Arrangement Category and Subcategory. Also **NOTE you cannot enter a residence address if the individual lives in an ICF-IID** setting and if they live in a license setting, you will have to select the address from the listing of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



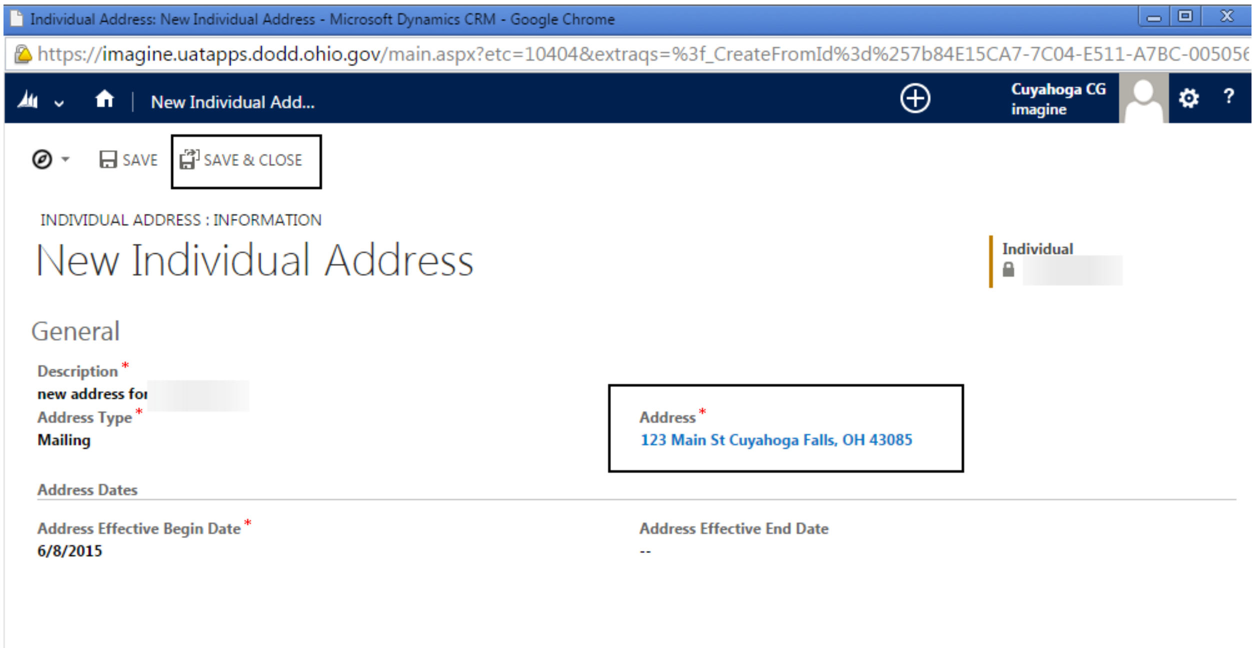
4. Click the **+New** button



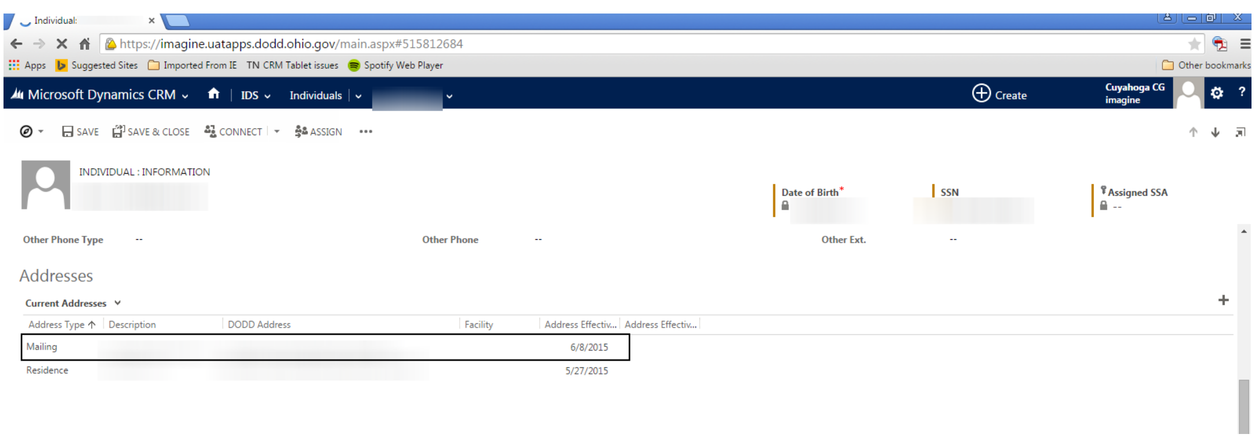
5. Street1, City, State and Zip are required fields denoted with a red asterisk (*). **SAVE & CLOSE** when you are done entering the new address detail.



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



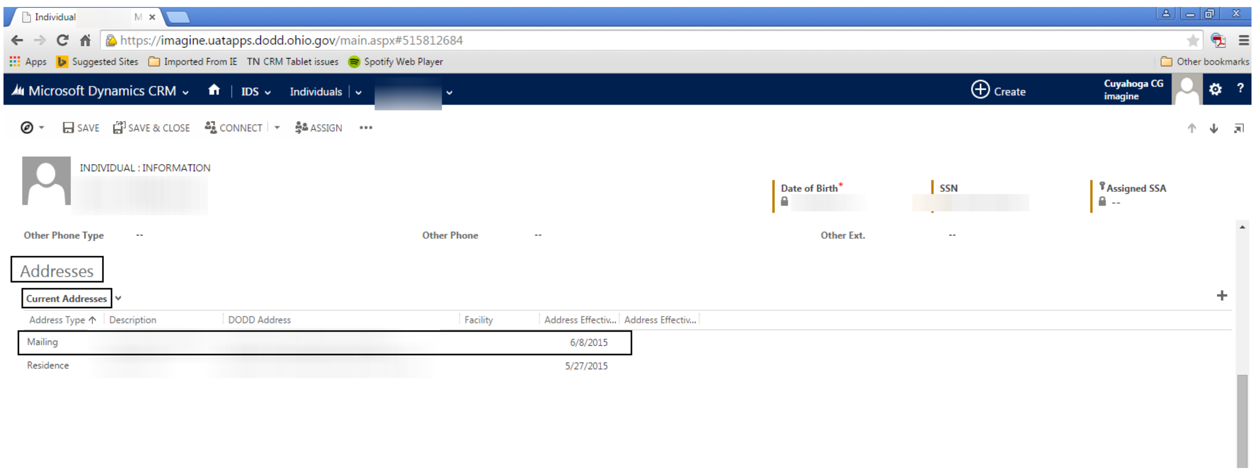
7. You will now see the new address listed under Current Addresses.



Edit Individual Address

10. Edit an Individual Address

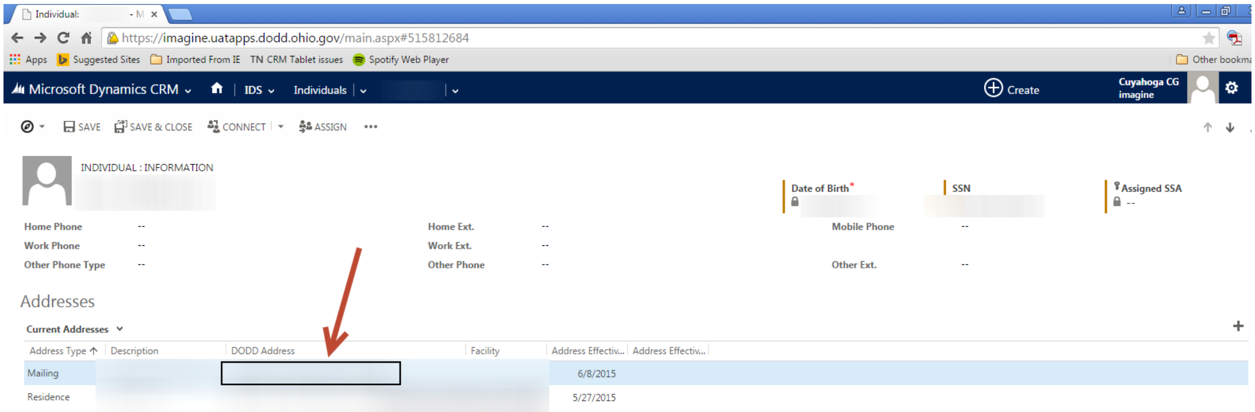
1. While on the Individual Information page scroll down to the Address section. All existing addresses will be displayed under Current Addresses.



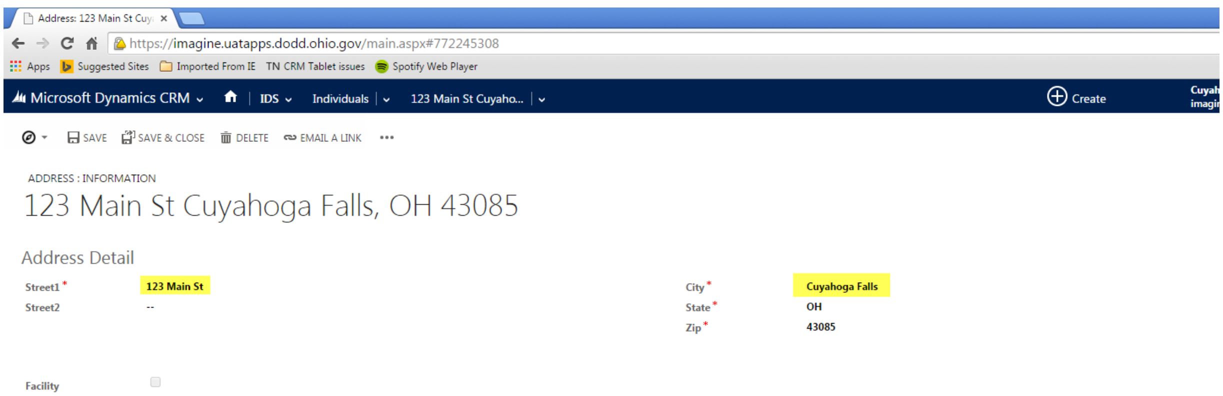
2. Click the field (Hyperlink) called **DODD Address** to open the Individual Address you would like to edit. This will take you directly to the *actual address* information.

   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.

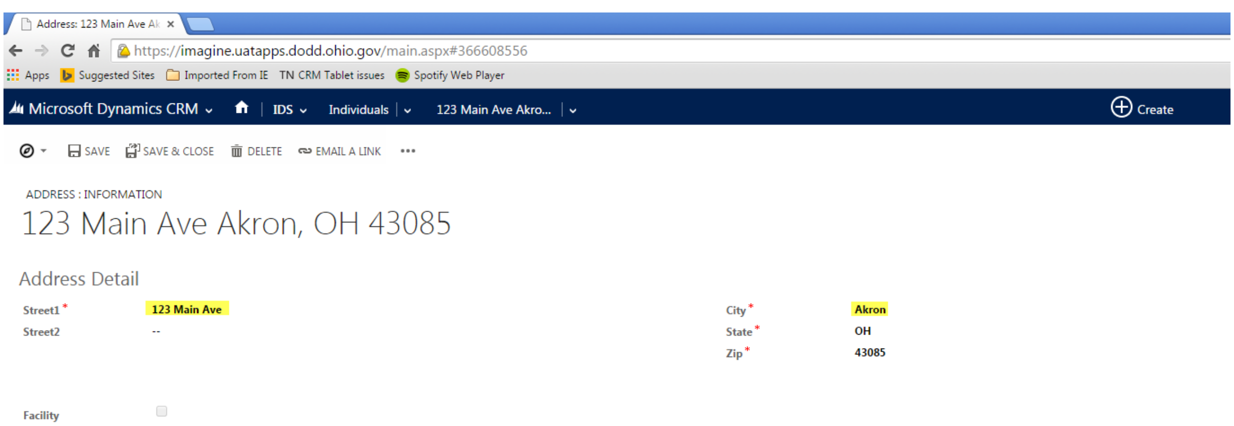
   Note: Only residence addresses will be updated in the legacy IDS for use by other DODD systems.



Before edit:



After edit:



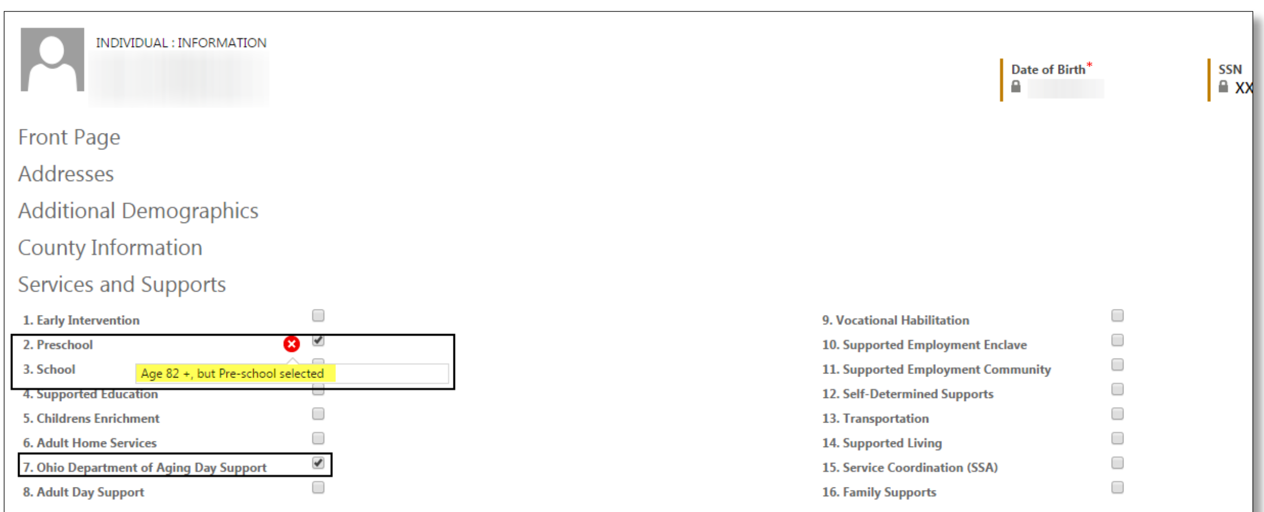
Edit Service and Support

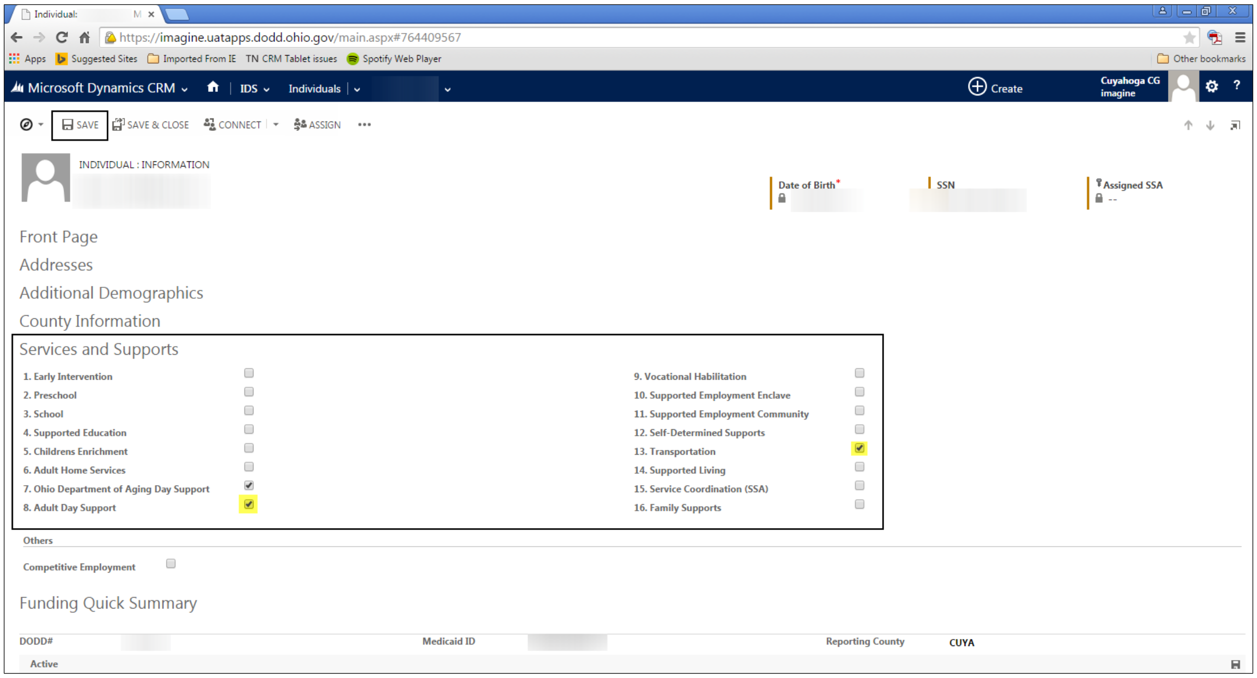
11. Edit (add or remove) Services and Support

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

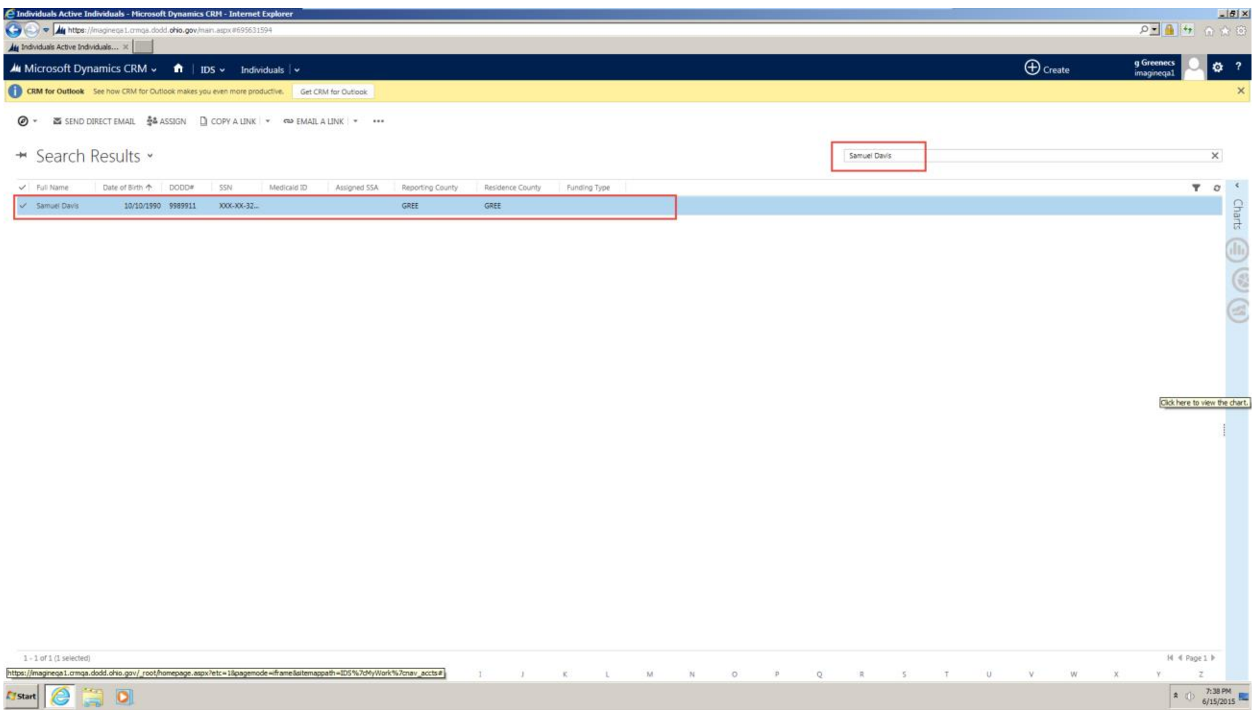
   Ex.



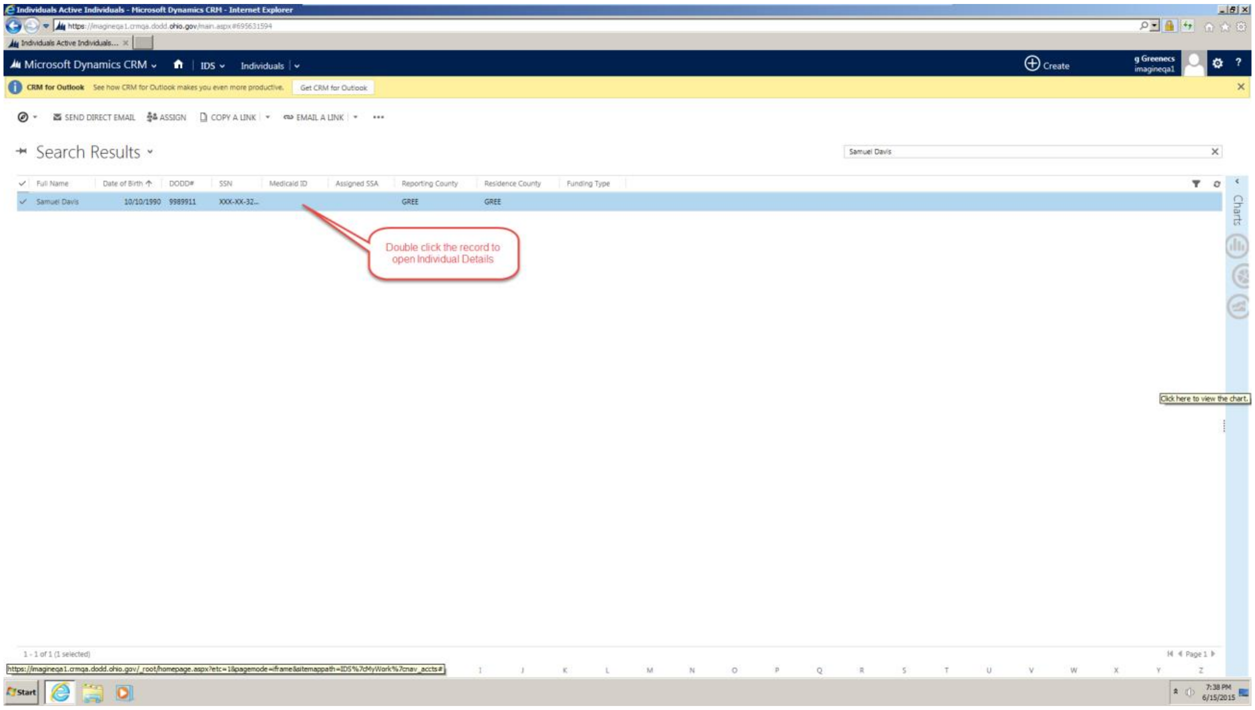

https://imagine.uatapps.dodd.ohio.gov/main.aspx#764409567
Microsoft Dynamics CRM
IDS
Individuals
Create
Cuyahoga CG imagine
SAVE
SAVE & CLOSE
CONNECT
ASSIGN
INDIVIDUAL : INFORMATION
Date of Birth
SSN
Assigned SSA
Front Page
Addresses
Additional Demographics
County Information
Services and Supports
1. Early Intervention
2. Preschool
3. School
4. Supported Education
5. Childrens Enrichment
6. Adult Home Services
7. Ohio Department of Aging Day Support
8. Adult Day Support
9. Vocational Habilitation
10. Supported Employment Enclave
11. Supported Employment Community
12. Self-Determined Supports
13. Transportation
14. Supported Living
15. Service Coordination (SSA)
16. Family Supports
Others
Competitive Employment
Funding Quick Summary
DODD#
Medicaid ID
Reporting County
CUYA
Active

Decision Tree for County Board Eligibility

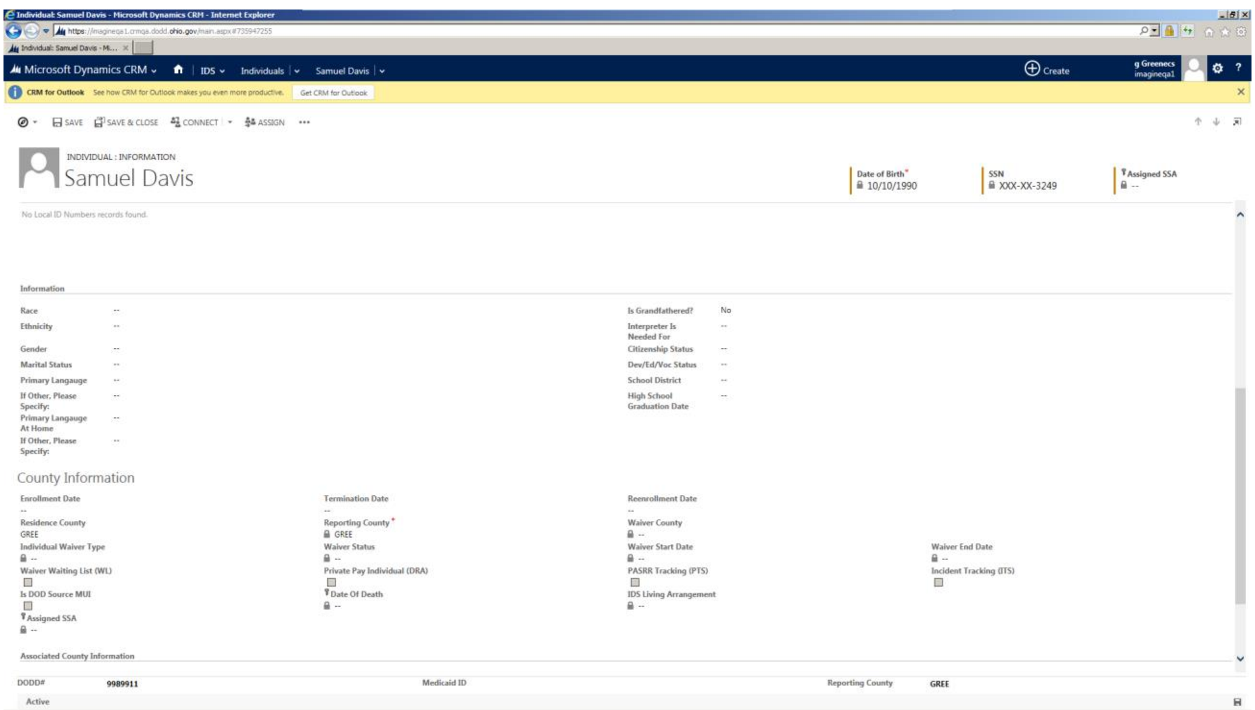
1. To start county board eligibility for an Individual, Search for individual by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box
3. **Individual record will show up** if individual exist in your county



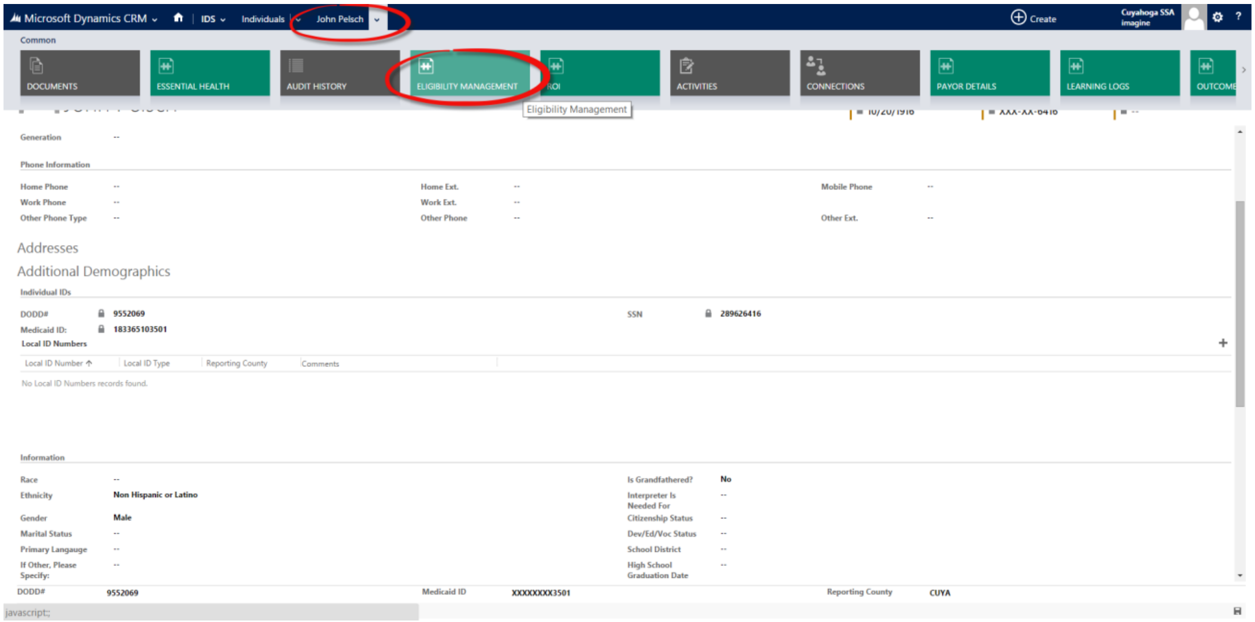
4. Double click on individual record to open individual's record



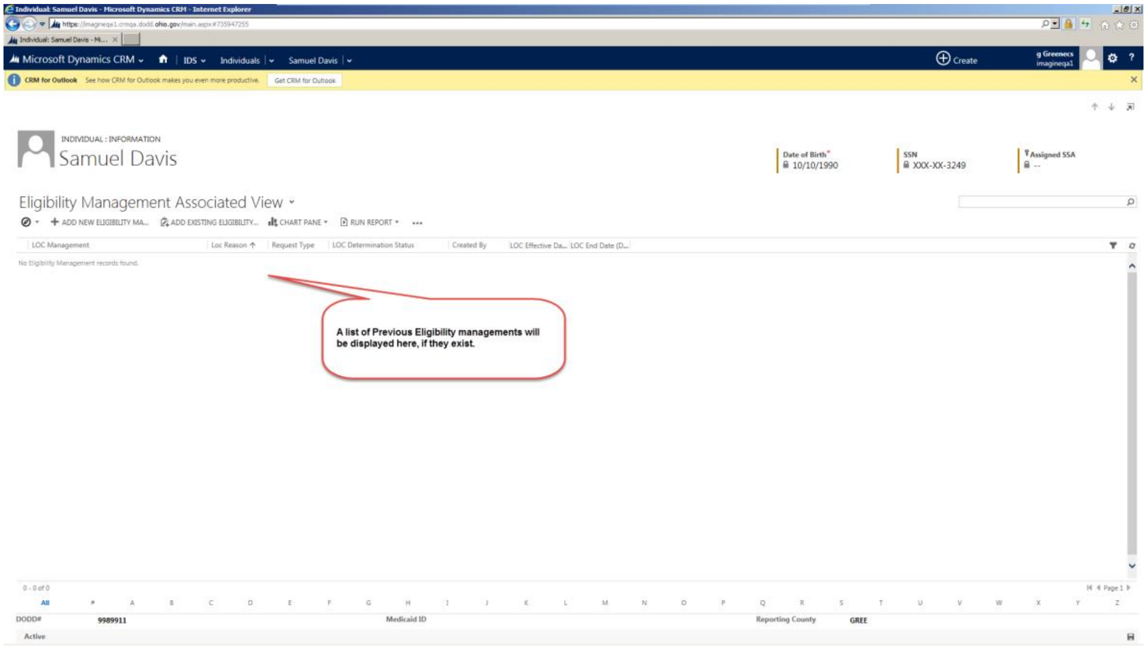
5. User will land on **Individual front page.**



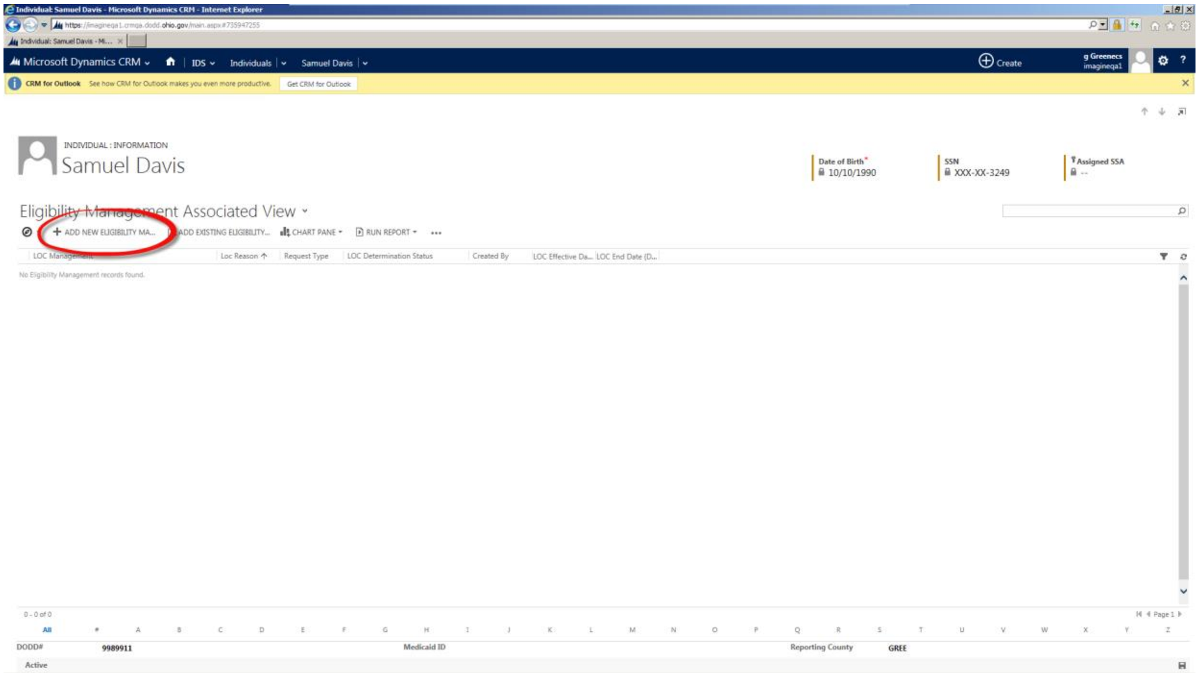
6. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



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

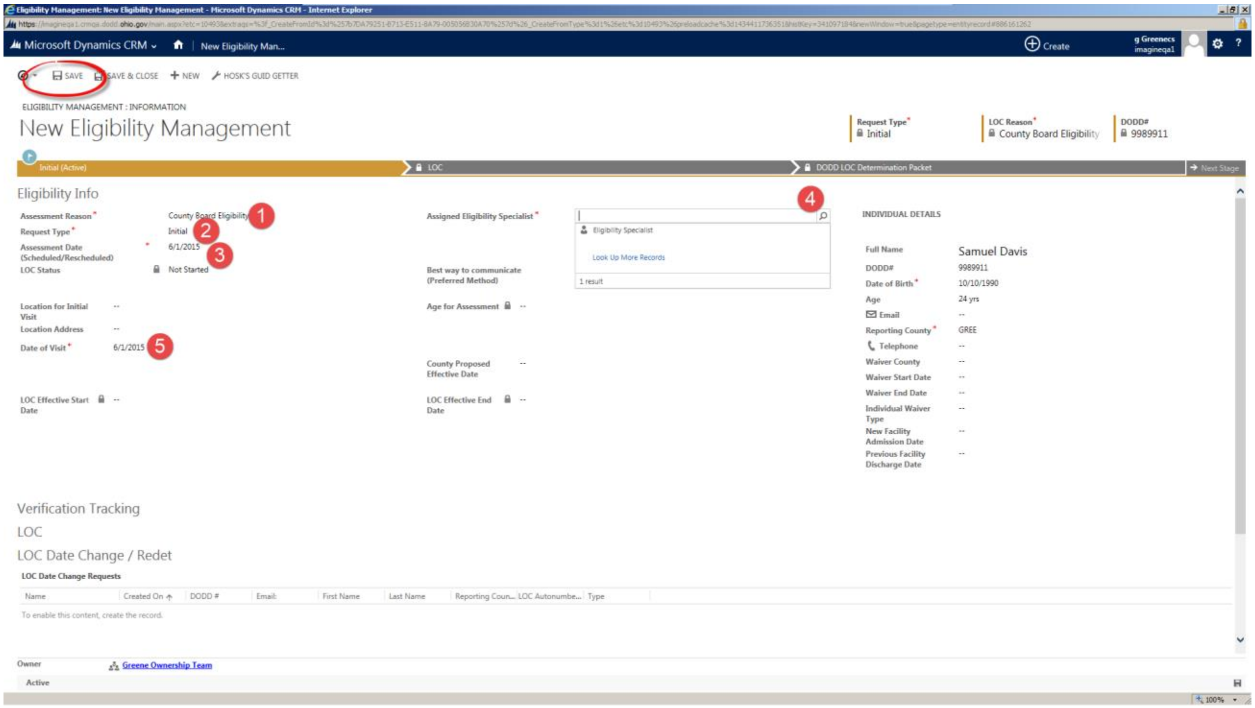


8. Add New Eligibility Management

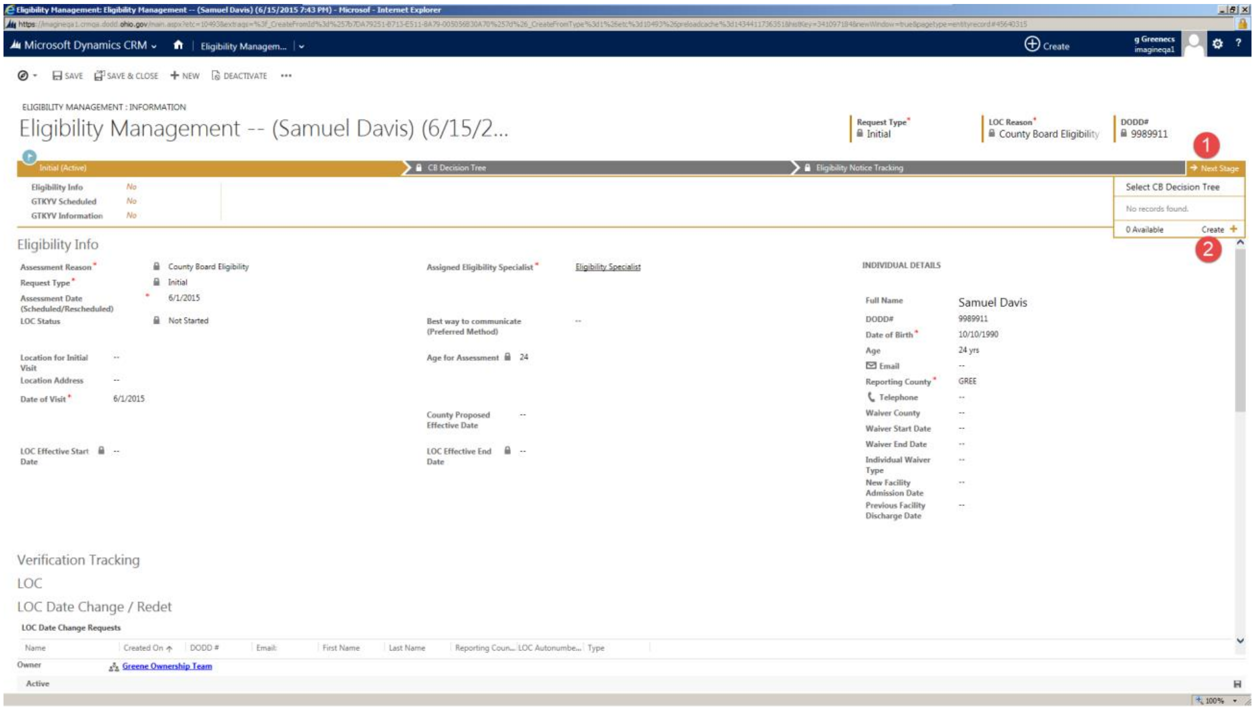


9. Enter required information on **Initial stage** to Save Eligibility management
    1. **Assessment Reason** = select County Board Eligibility
    2. **Assessment Type** = Initial
    3. **Assessment Date =** can be todays or past date – it's when you are got this information from individual
    4.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

Click on SAVE button.

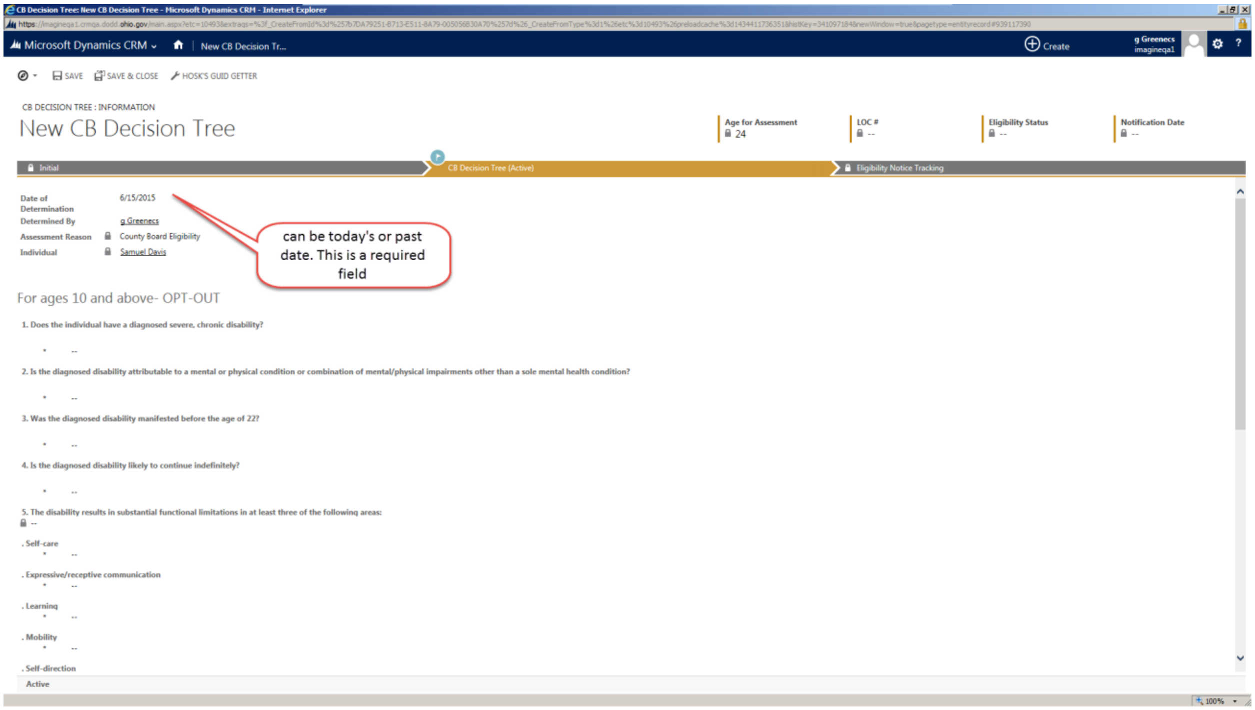

Eligibility Management: New Eligibility Management - Microsoft Dynamics CRM - Internet Explorer
Microsoft Dynamics CRM
New Eligibility Man...
Create
SAVE
SAVE & CLOSE
NEW
HOSK'S GUID GETTER
ELIGIBILITY MANAGEMENT : INFORMATION
New Eligibility Management
Request Type
Initial
LOC Reason
County Board Eligibility
DODD#
9989911
Initial (Active)
LOC
DODD LOC Determination Packet
Next Stage
Eligibility Info
Assessment Reason
County Board Eligibility
1
Request Type
Initial
2
Assessment Date (Scheduled/Rescheduled)
6/1/2015
3
LOC Status
Not Started
Location for Initial Visit
Location Address
Date of Visit
6/1/2015
5
LOC Effective Start Date
Assigned Eligibility Specialist
4
Eligibility Specialist
Look Up More Records
1 result
Best way to communicate (Preferred Method)
Age for Assessment
County Proposed Effective Date
LOC Effective End Date
INDIVIDUAL DETAILS
Full Name
Samuel Davis
DODD#
9989911
Date of Birth
10/10/1990
Age
24 yrs
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 Coun...
LOC Autonumbe...
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

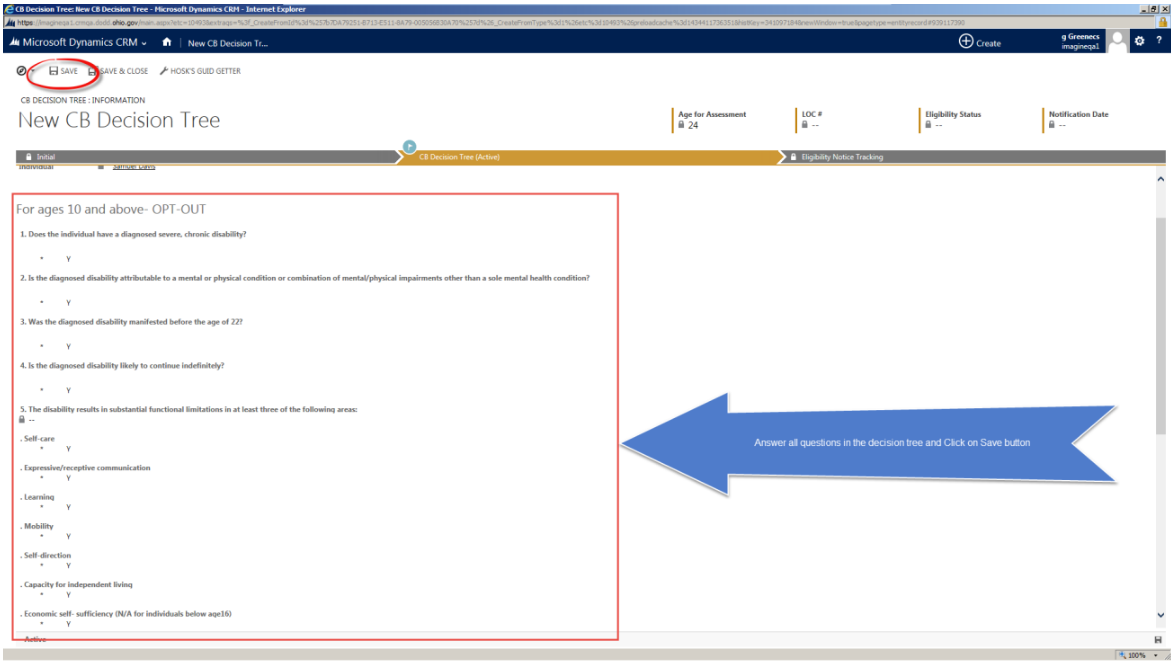


NOTE: The decision tree is available based on the individual's present age (Birth to 2, 3 to 5, 6 to 9 and 10 and above).

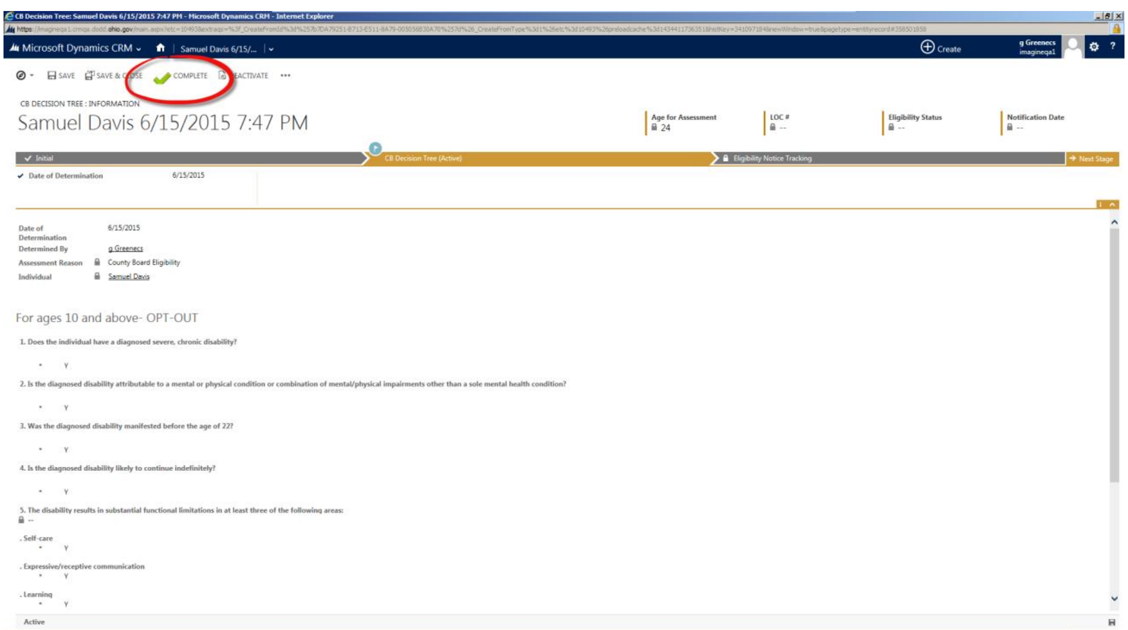
11. Enter the **Date of Determination** – can be todays or past date. This is a required field

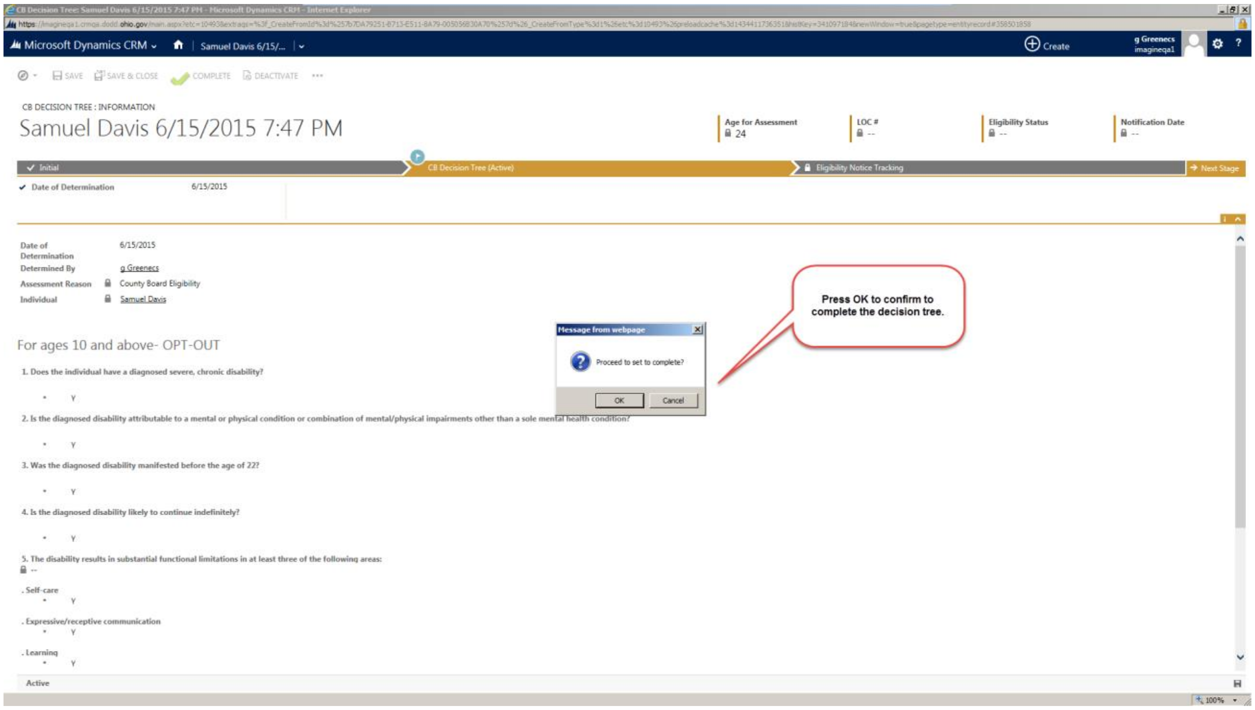


12. Answer all the questions on **Decision Tree**
13. **Save** or **Save and Close** at any time by clicking on the save button or the save and close button from top of this screen

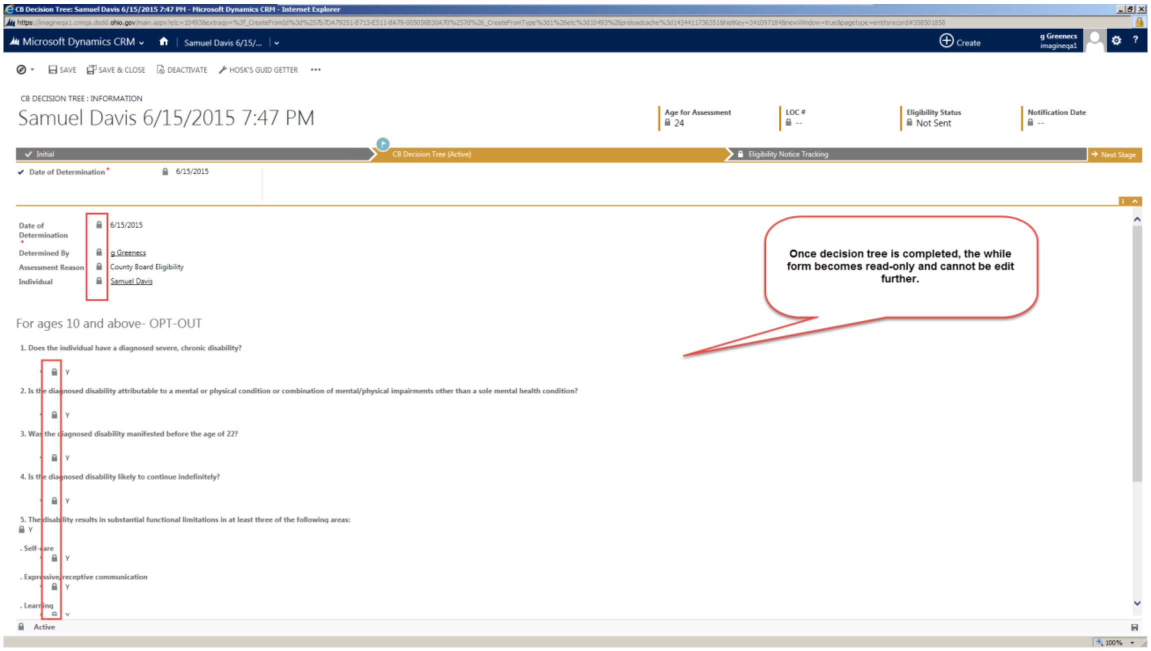


14. Click on the **COMPLETE button** (appears only after Save) from top of this screen

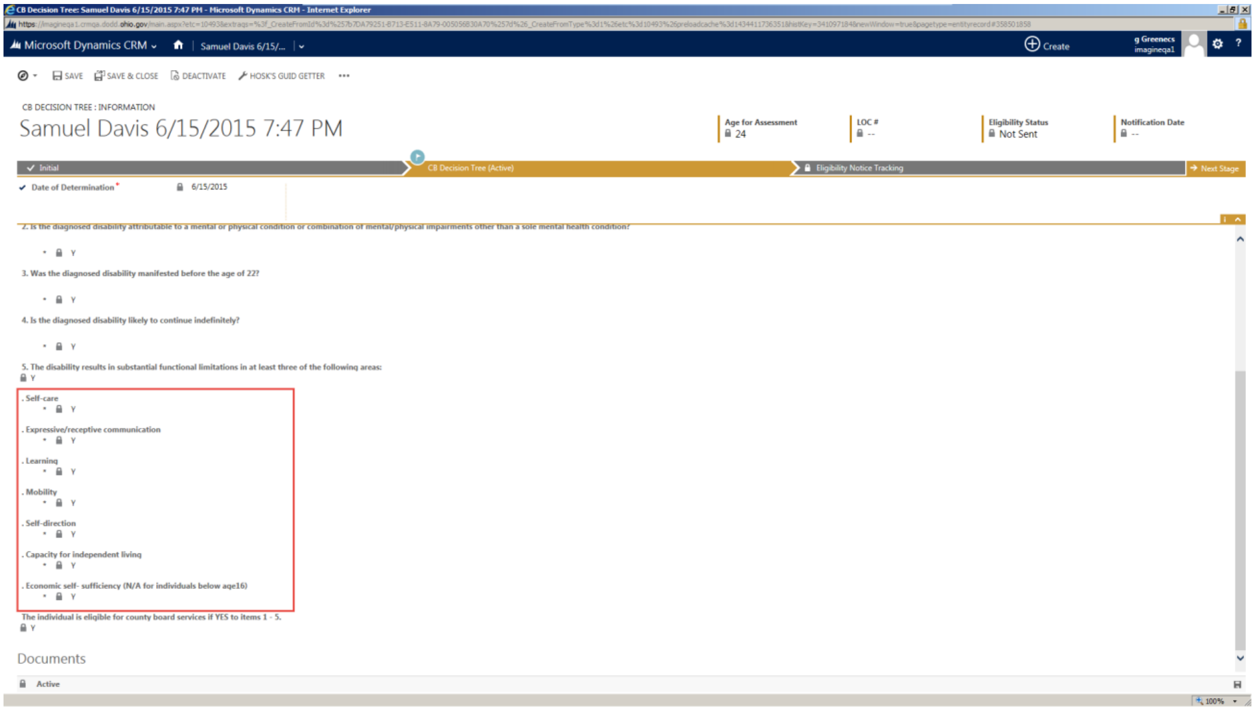




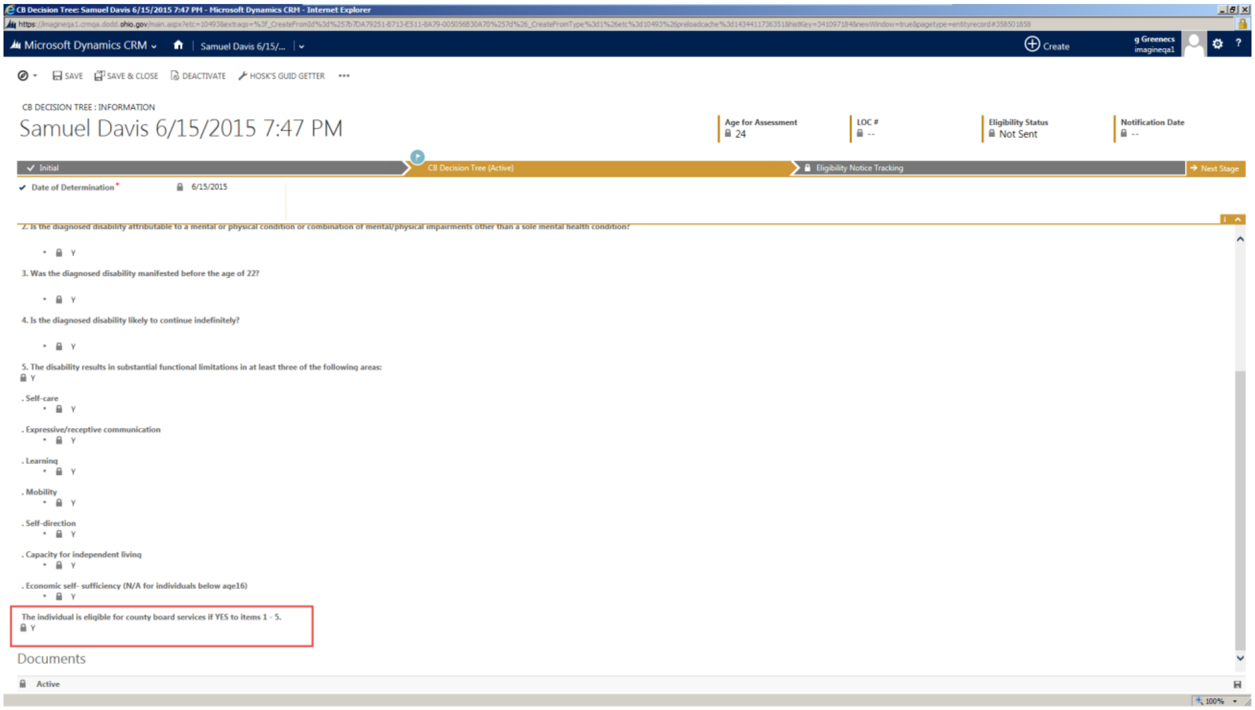
15. Once Decision Tree is Completed→ **Decision Tree becomes read only;** user will see the lock symbol next to all the fields and cannot edit anything now.



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

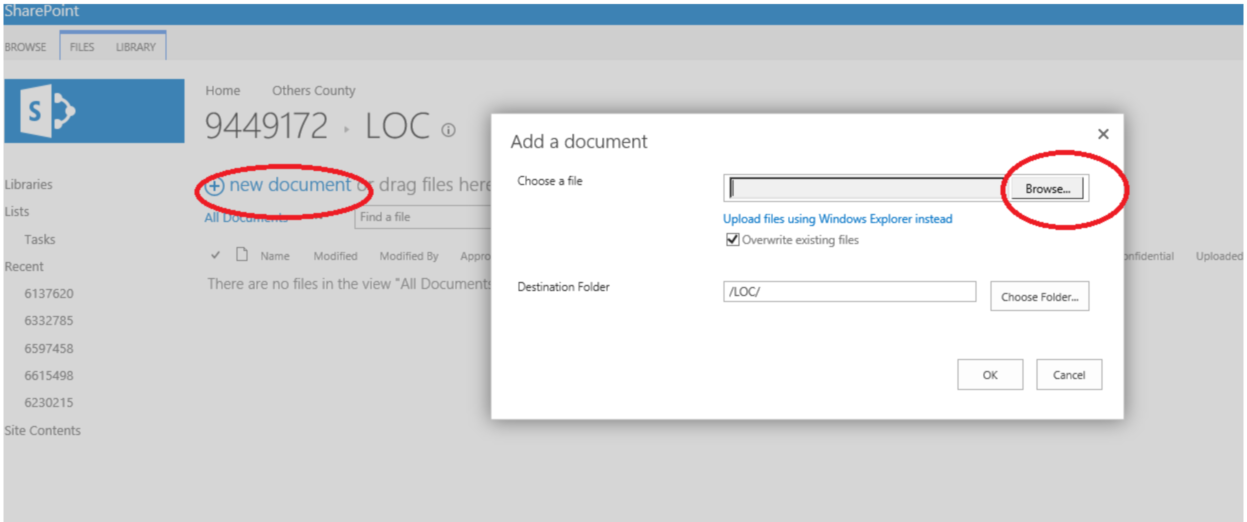


17. User will see a **YES/NO for if individual is county board eligible** once the Decision Tree is Completed.

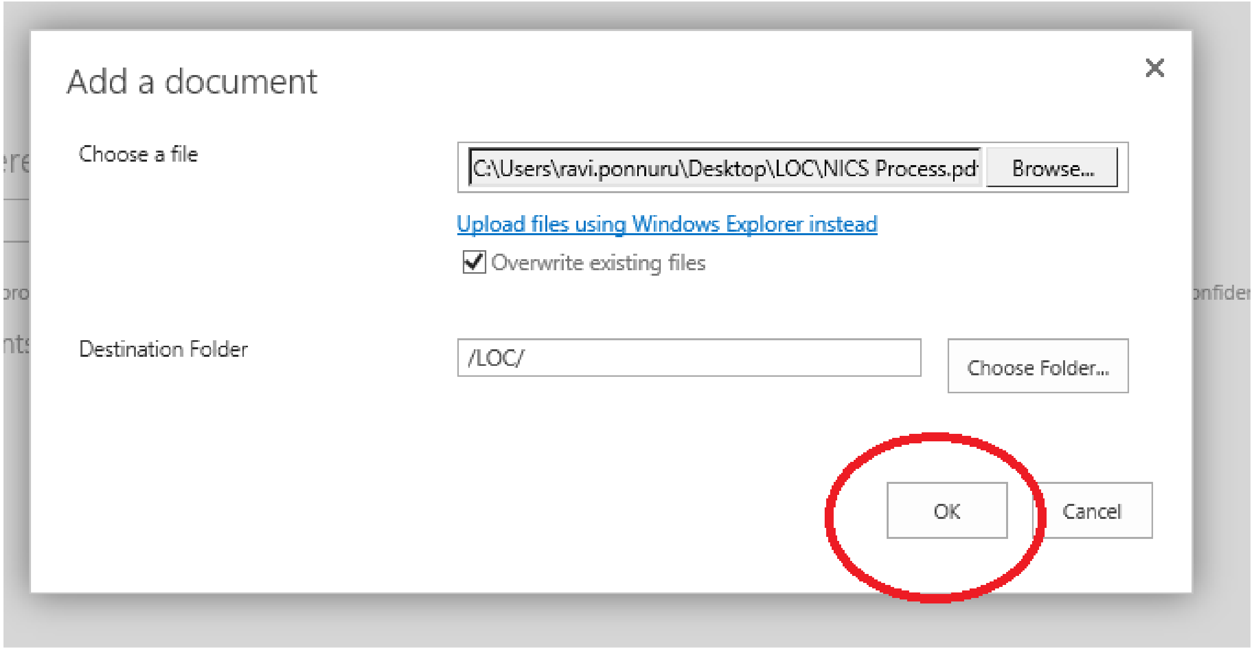


18. You can upload document to SharePoint at any time – before or after Completing the Decision Tree

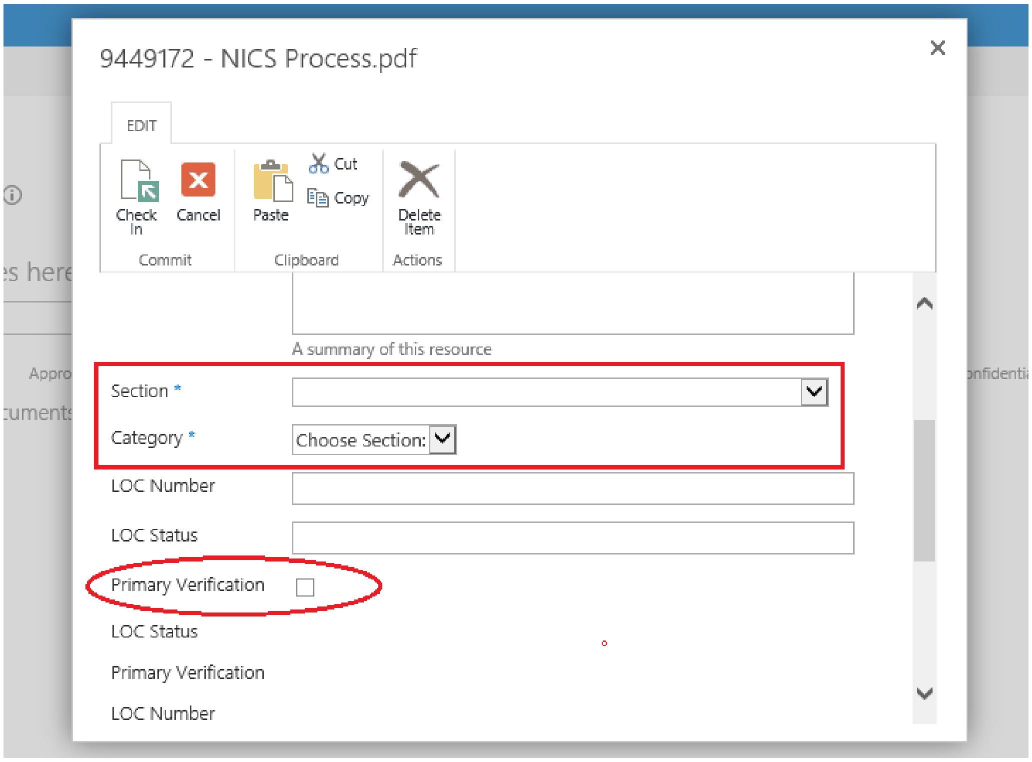
19. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document** to SharePoint
    1. Click on **+new document**
    2. Click on **chose file**



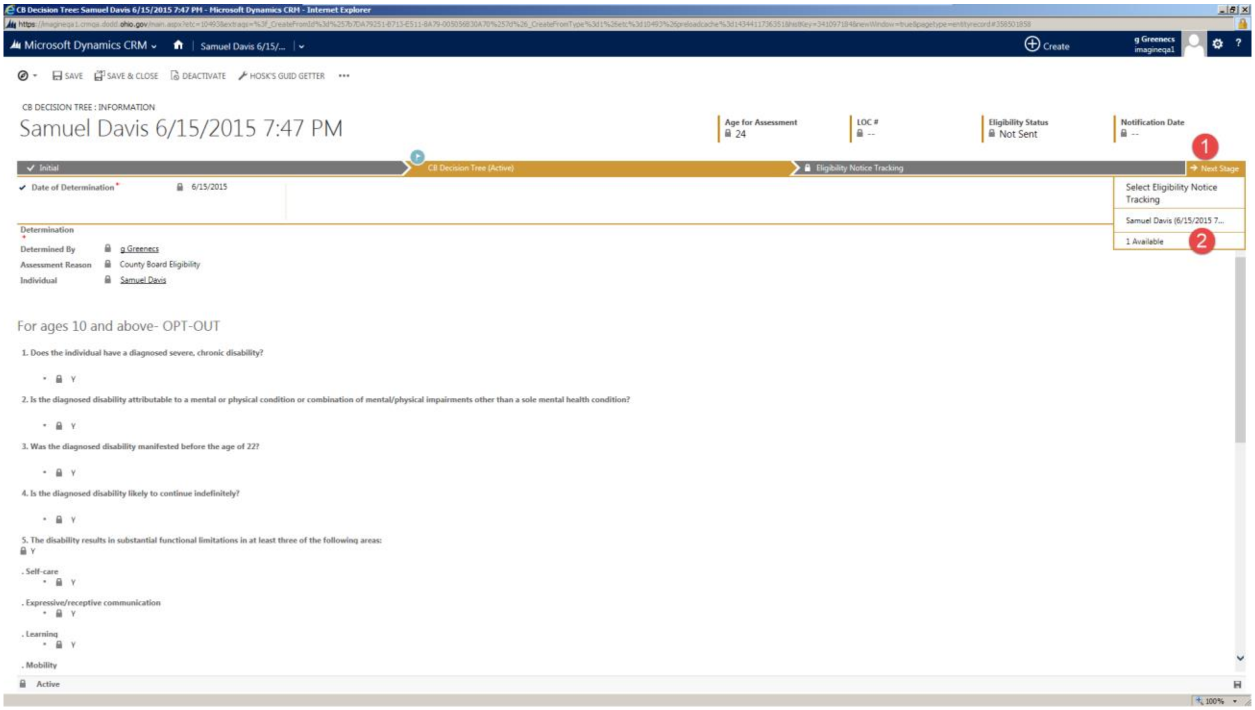
3. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on "Open" once done selecting
4. You will be back on previous screen → **Click on OK**



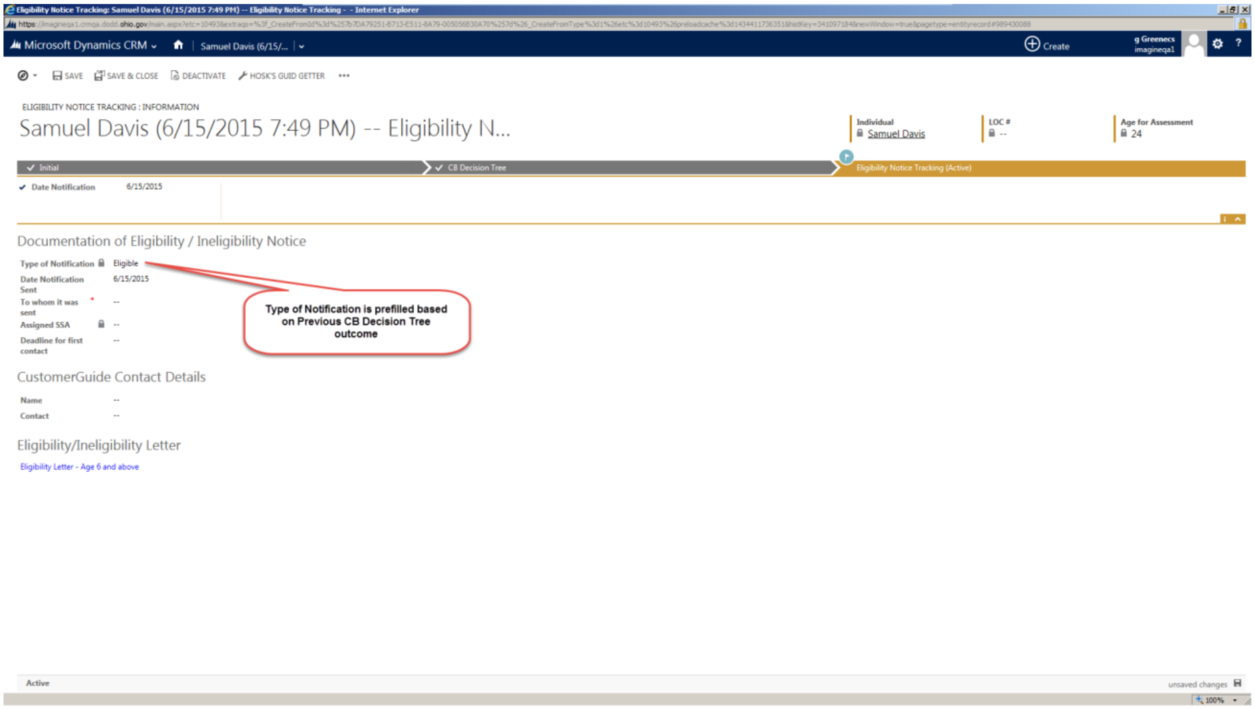
5. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
6. **Add Section →** Select "**LOC**" from the option set
7. **Add Category→** Select the reason for what you are uploading the document → in this case it should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

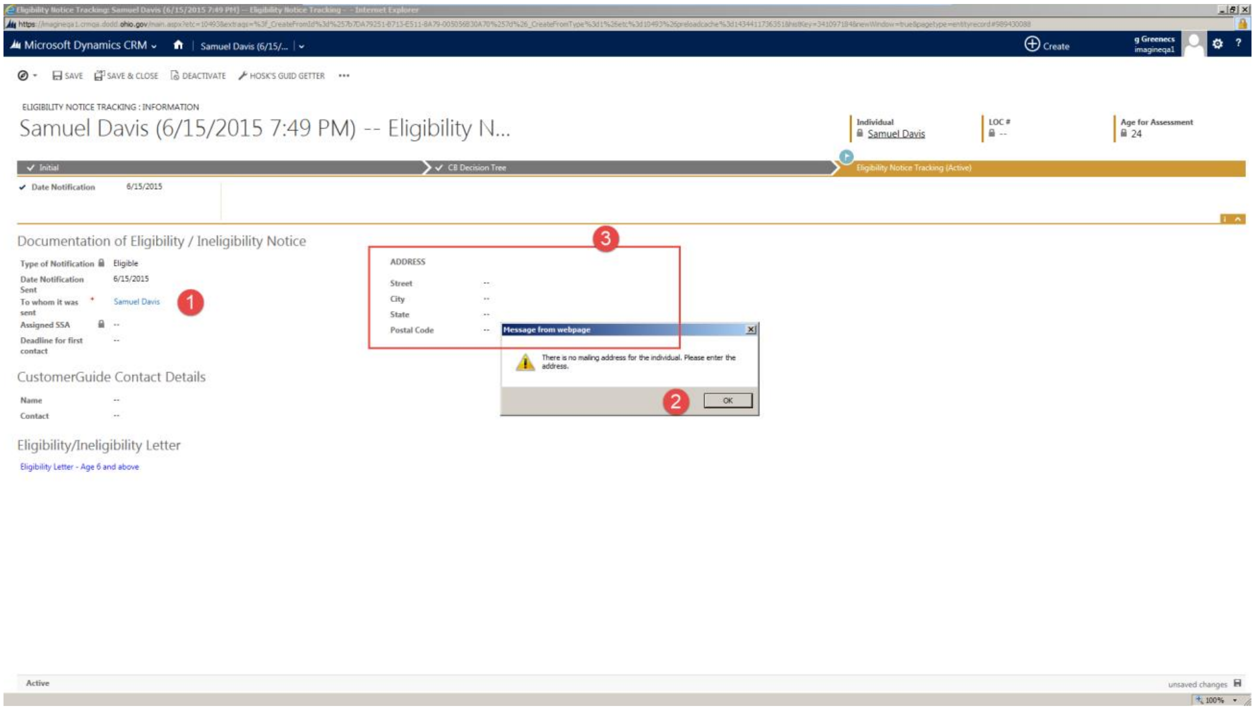
20. Move to **Eligibility Notice Tracking stage →** by clicking
    1. on the **"Next Stage"** and
    2. **Select the Eligibility Notice that is available.**



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)

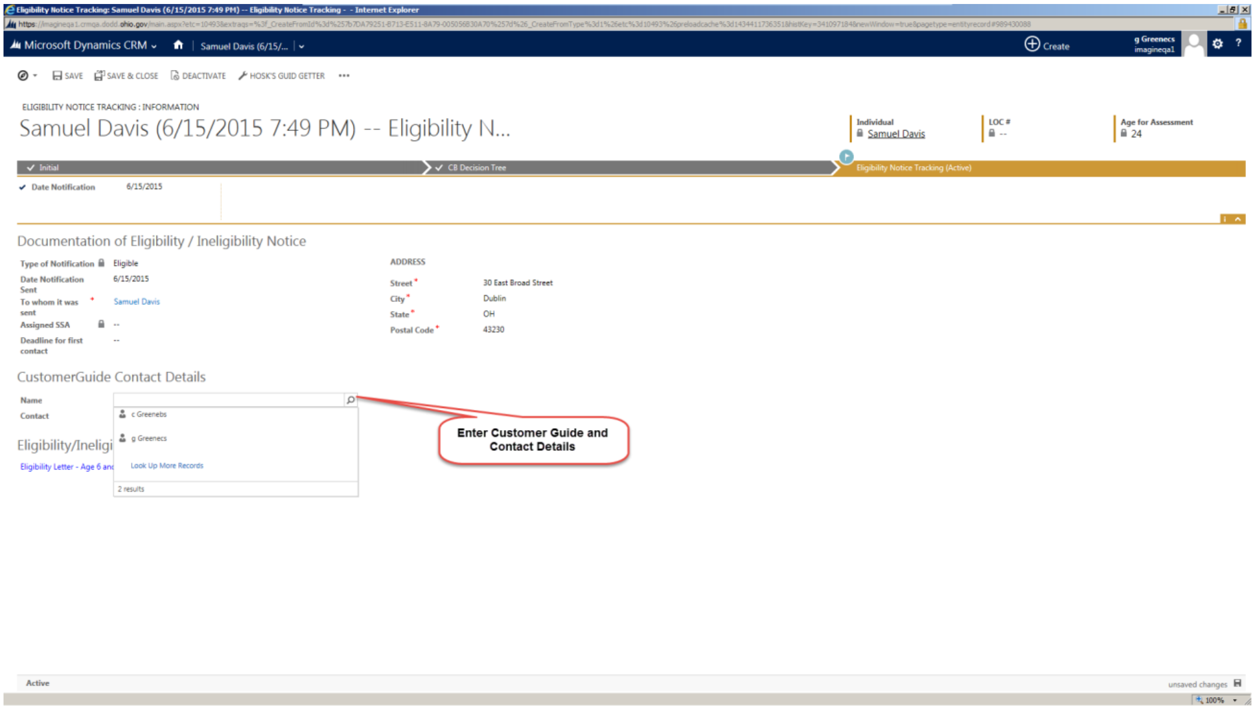


4. Enter **Date notification Sent** – date when you will send this notification to the individual. Not a required field.
5. Fill in **To Whom it was Sent**
    1. By selecting the Individual's name or individual's parent or guardian's name from the option set.

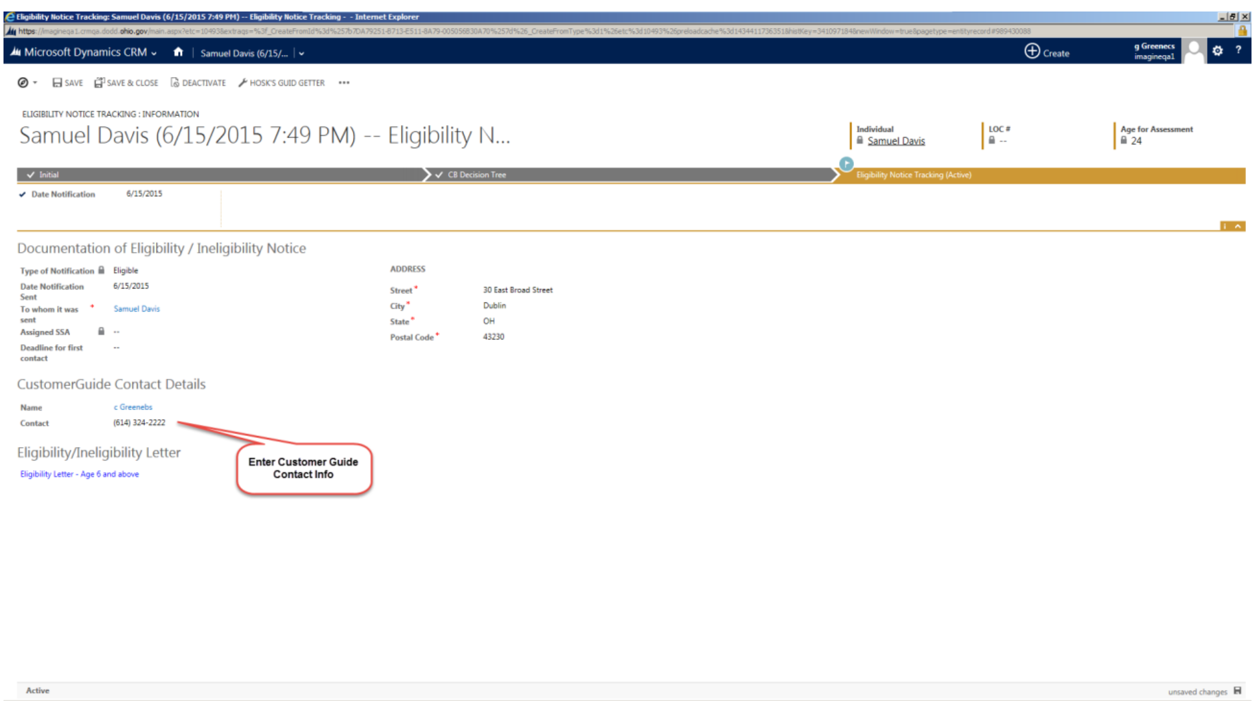


2. If the person to whom the mail has to be sent does not have mailing address, system will prompt you to enter mailing address. Press OK to confirm.
3. **Enter the mailing address** for the individual. Address will be prefilled if individual have a mailing address on his profile

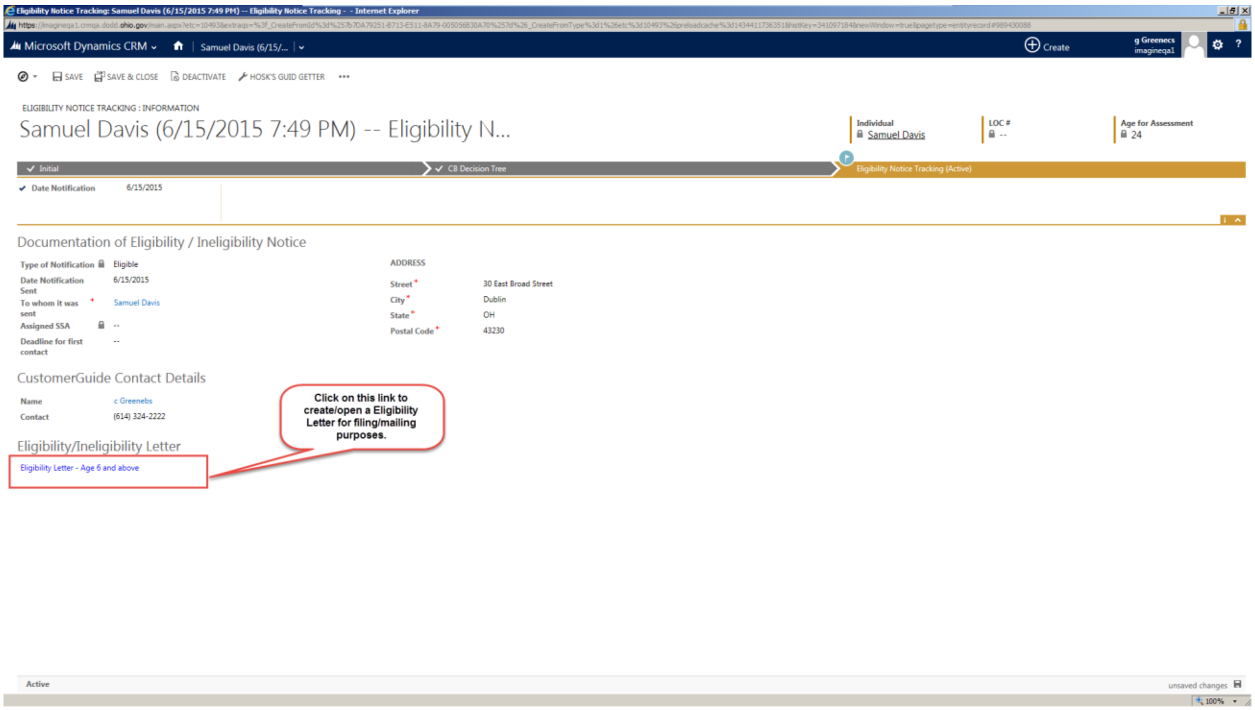
6. **Select a Customer Guide or Eligibility Specialist** by clicking on the magnifying glass - this will show you list of all customer guide and eligibility specialist in your county.



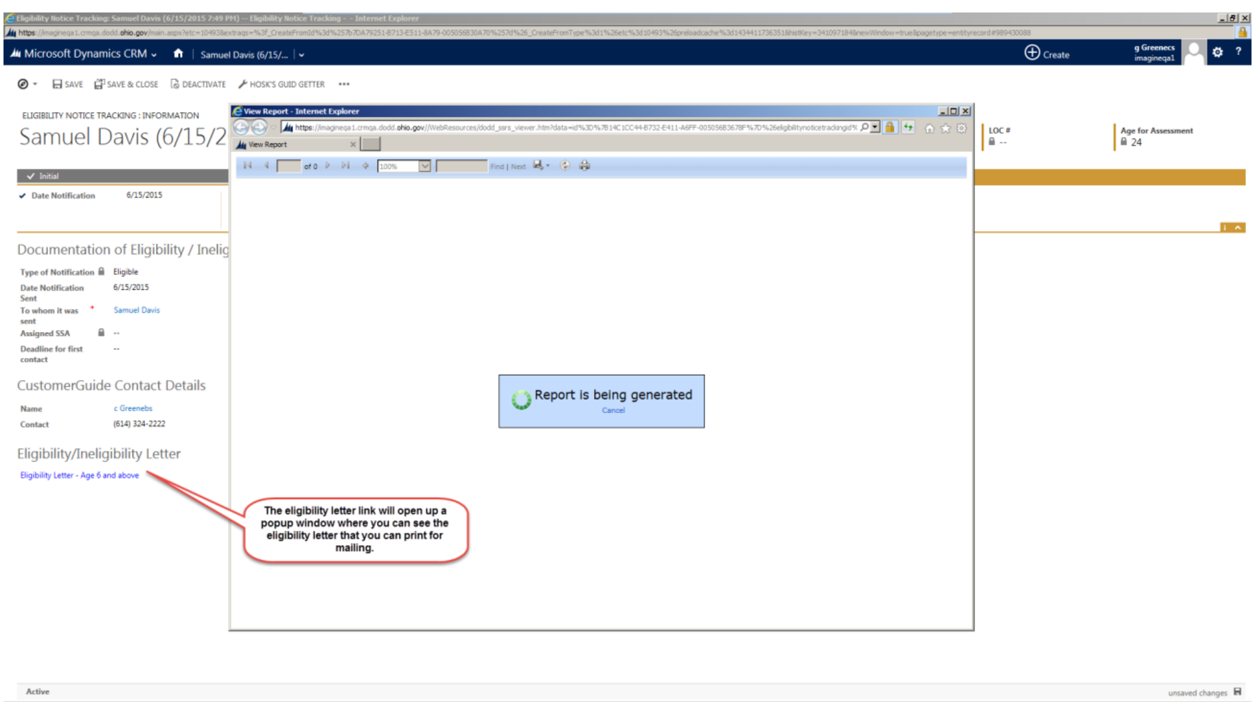
11. Enter Customer Guide's contact information

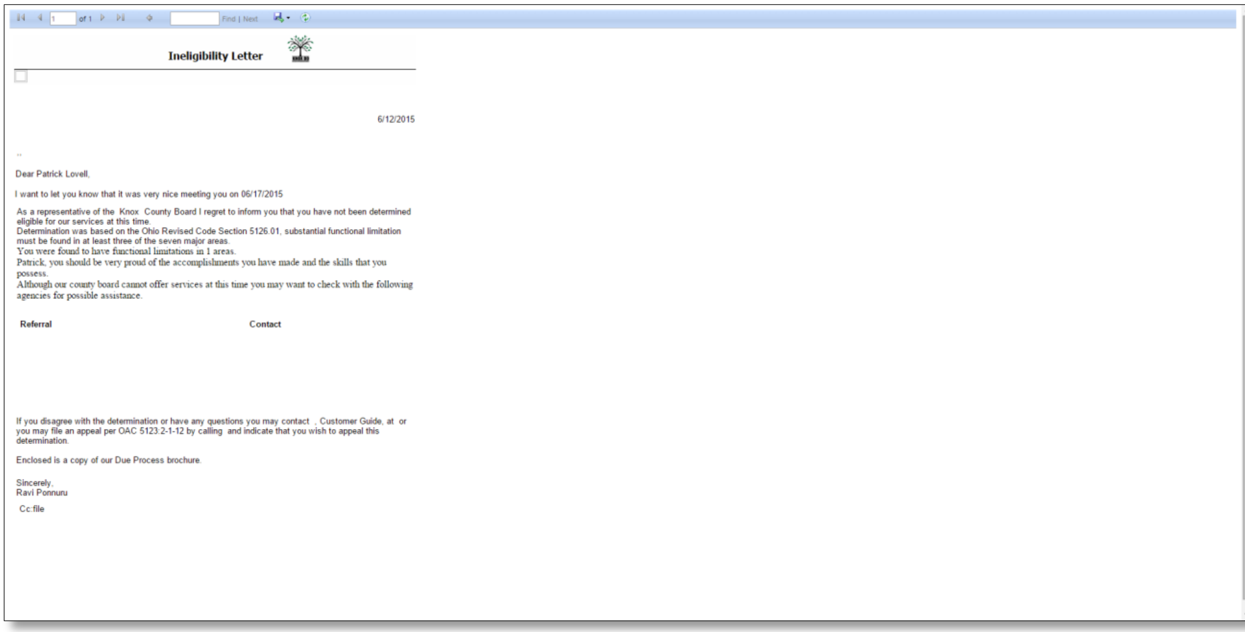


12. Open the **Eligible/Ineligible Notice** by clicking on the link under the Eligibility/Ineligibility Letter Tab

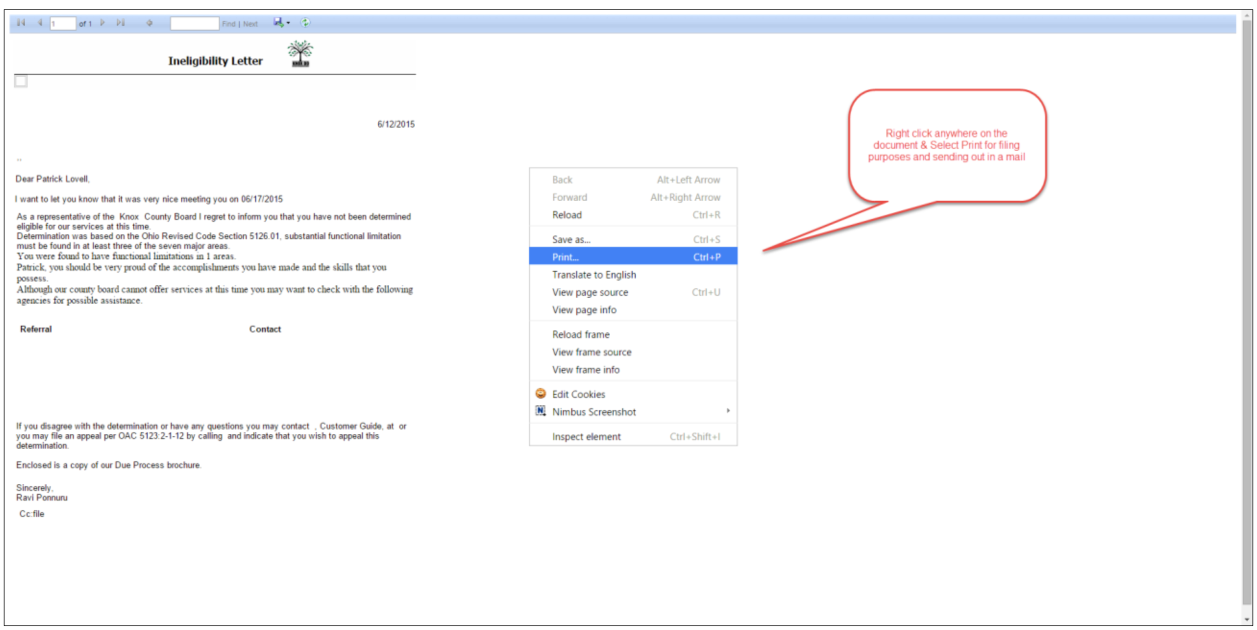


13. **Eligible/Ineligible Notice** will open in a new tab





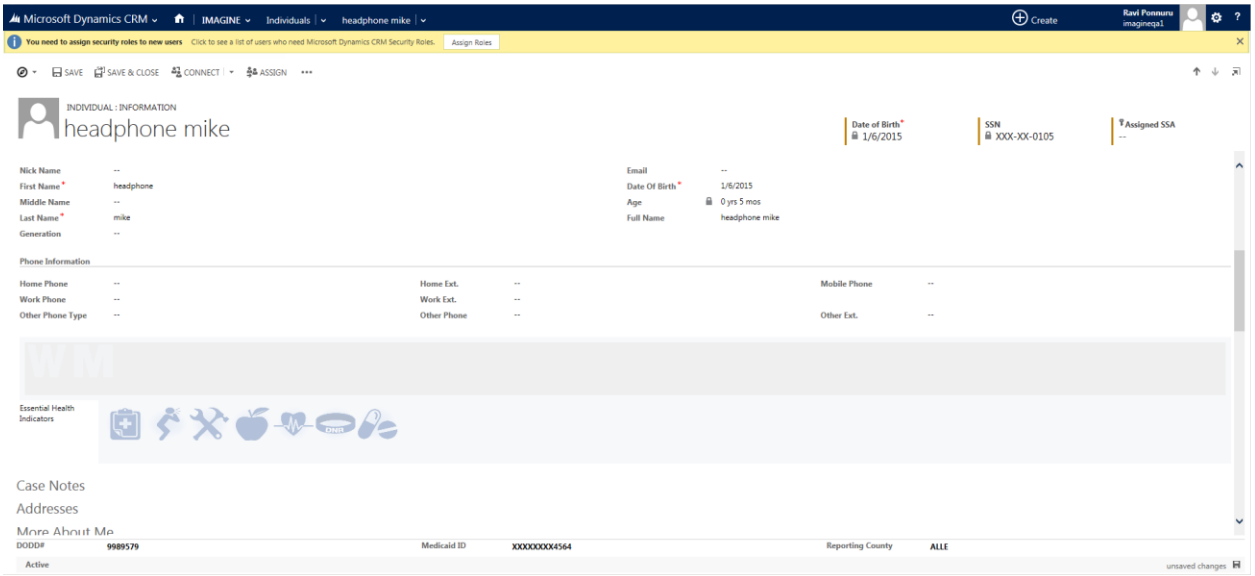
14. Right click on your mouse and select print to **Print the Notice**



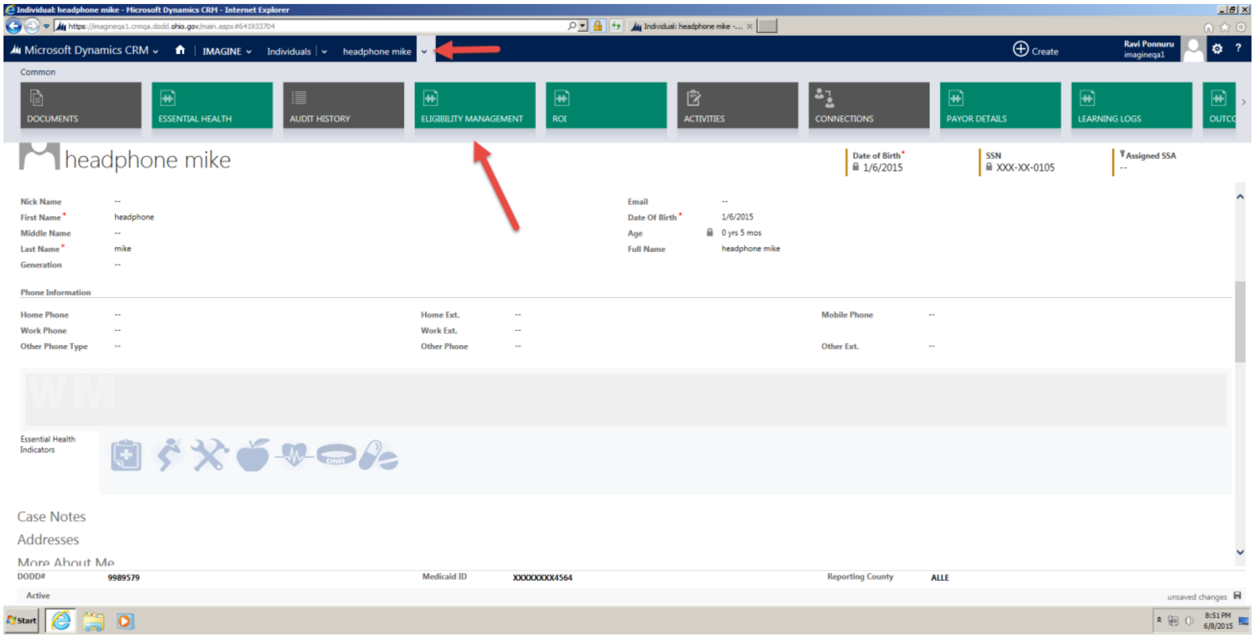
You just completed the County Board eligibility for an individual

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**

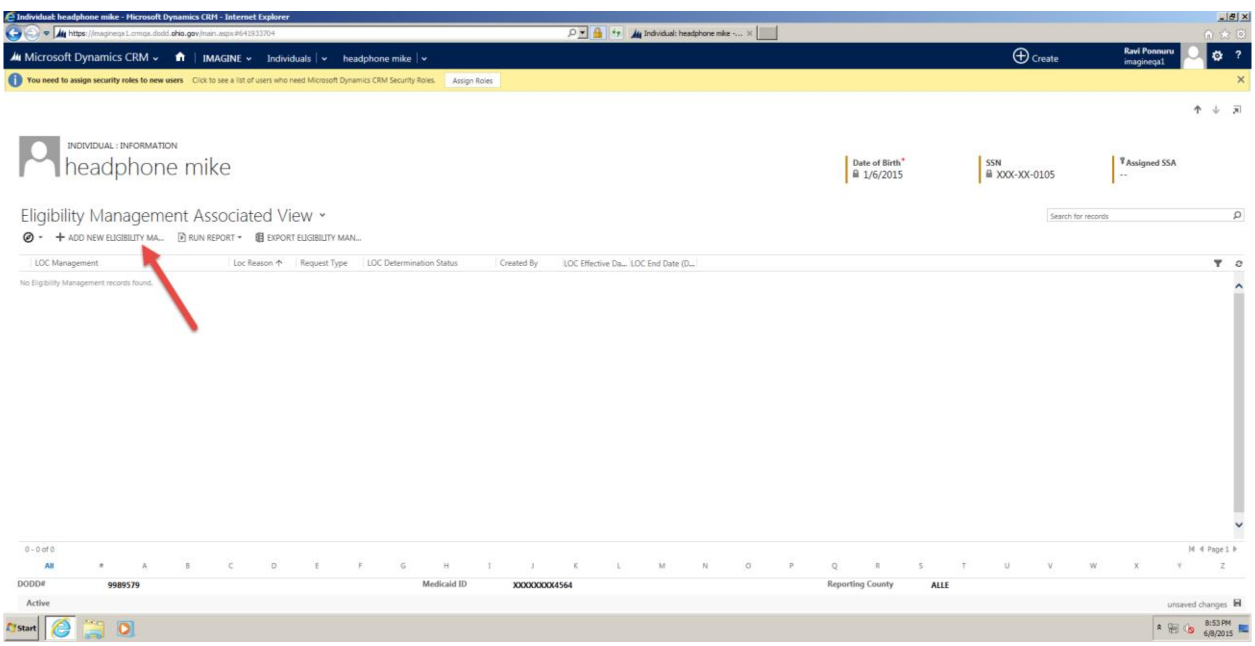


6. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



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

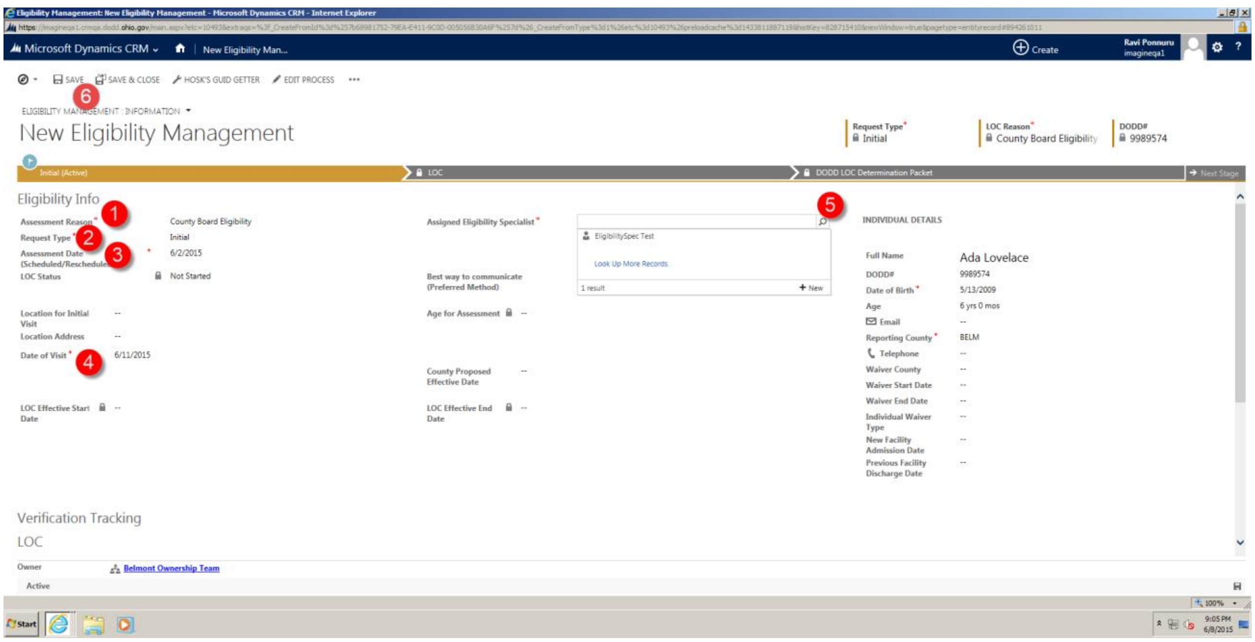
2. **Assessment Type** = Initial

3. **Assessment Date =** can be todays or past date – it's when you are got this information from individual

4. **Date of Visit =** can be todays 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

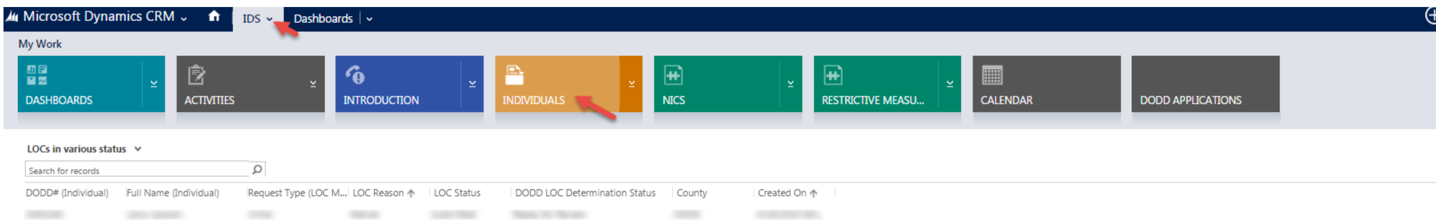
6. Click on Save button



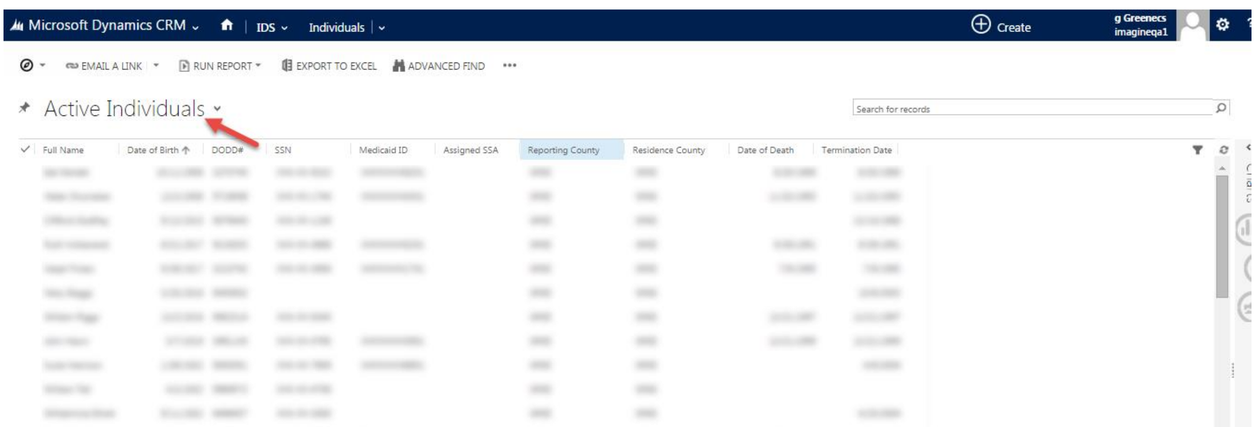
10. Cannot Move to **LOC stage** **(has to be an evaluator)**

LOC for Waiver Eligibility

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

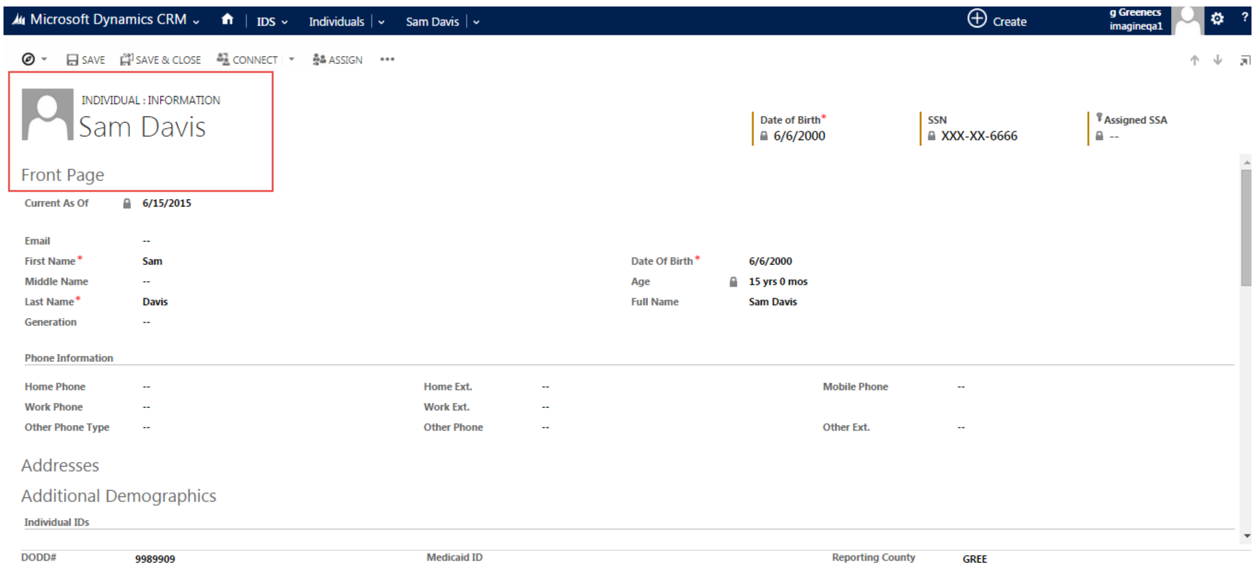


26. You will see list of **Active Individuals in your county**

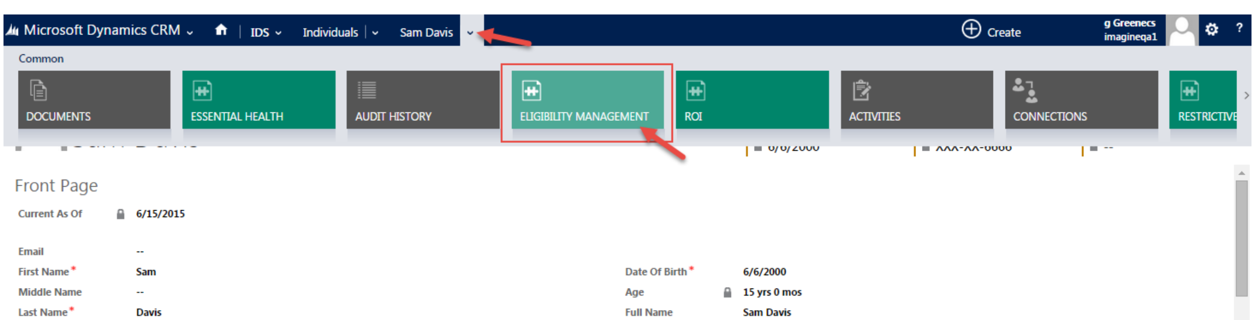


27. **Search for individual** by typing name in search box
28. Hit **Enter** or click on the magnifying glass next to search box
29. **Individual record will show up** if individual exist in your county

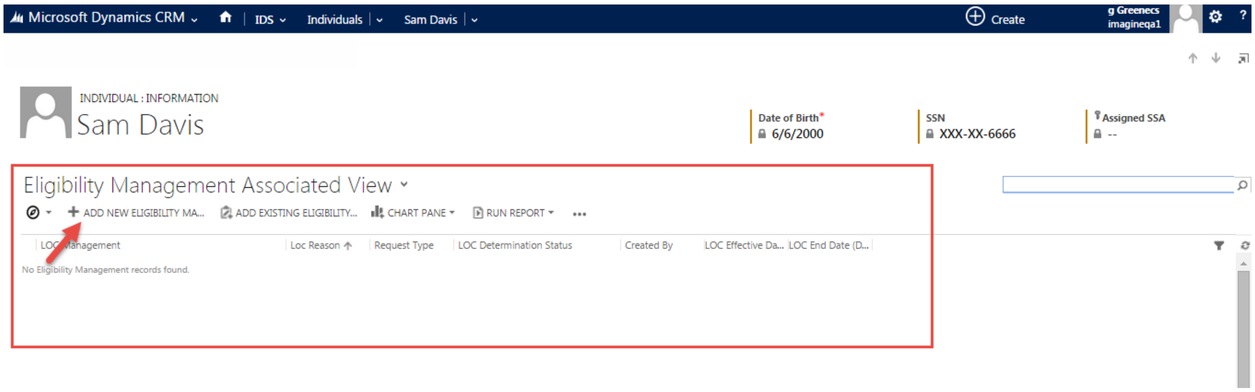
30. Double click on individual record to open individual's record
31. User will land on **Individual front page**



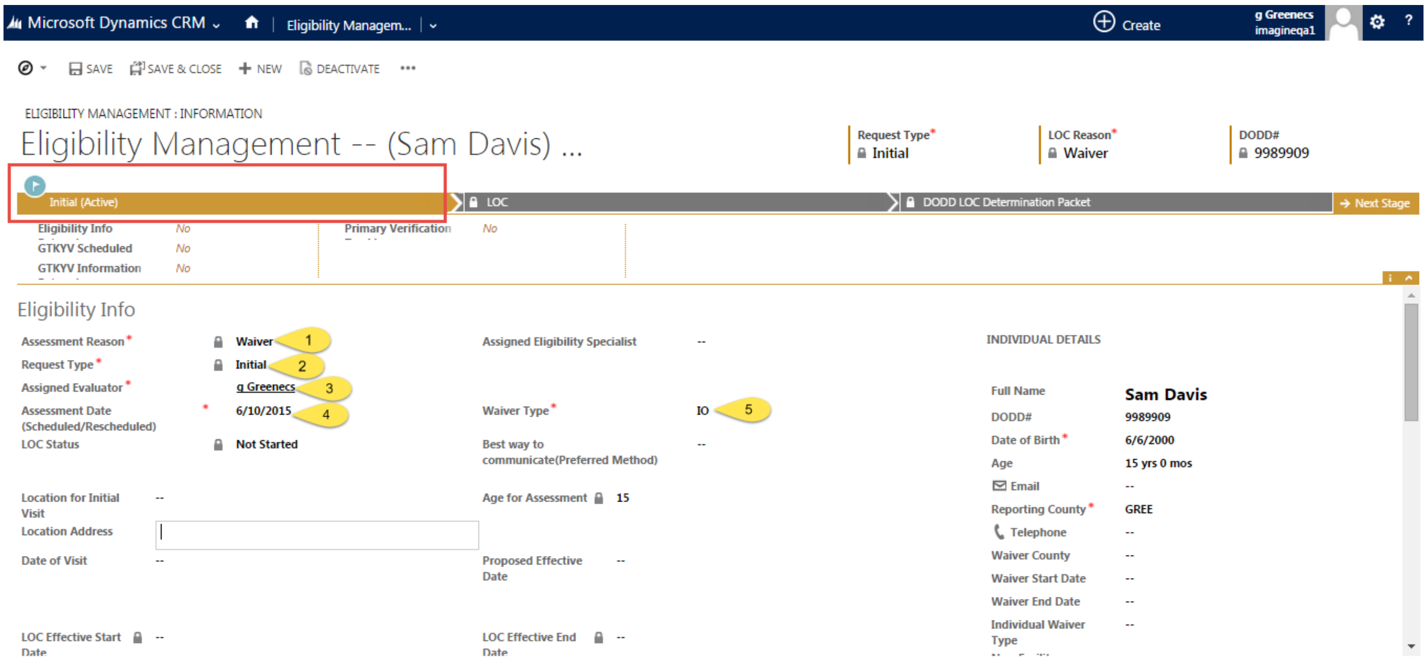
32. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



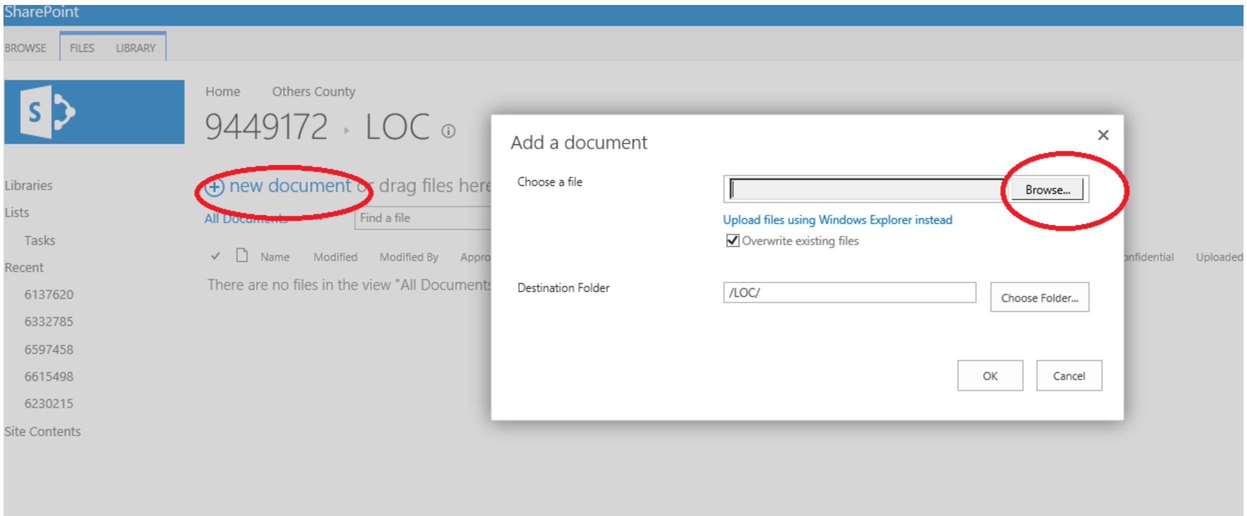
33. User will land on **Eligibility Management View Page**—you can see all the eligibilities done for that individual
34. **Add New Eligibility Management**



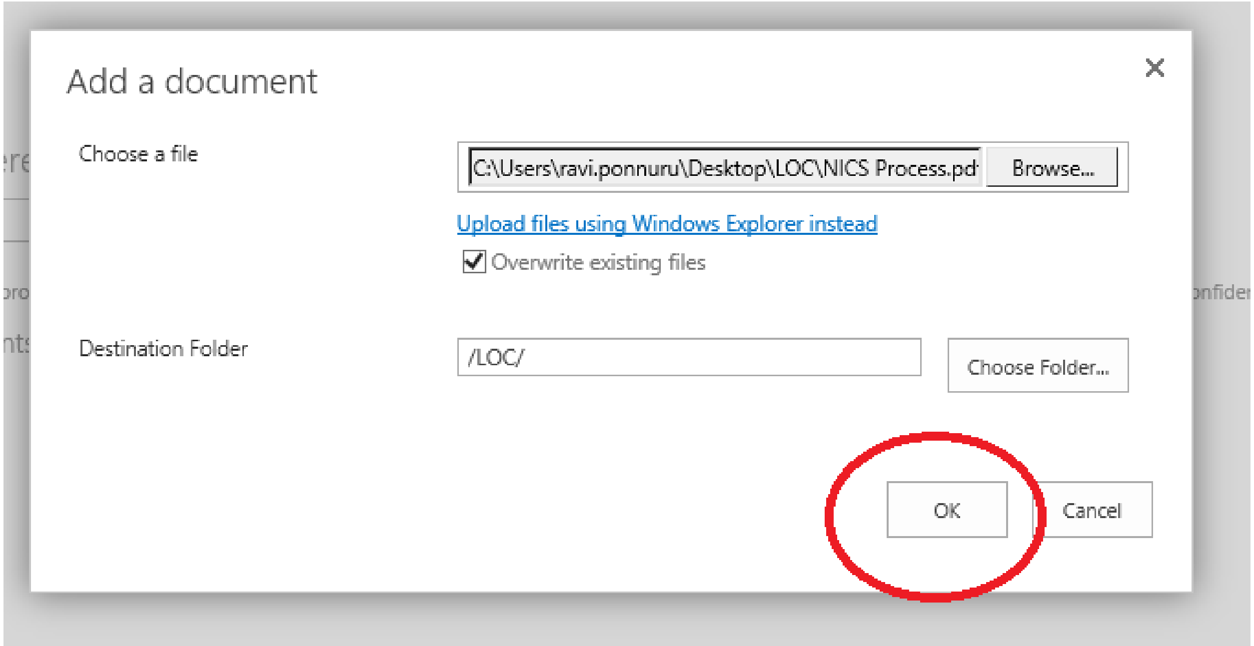
35. Enter required information on **Initial stage** to Save Eligibility management
    1. **Assessment Reason** = select Waiver
    2. **Request Type** = Initial
    3. **Assigned Evaluator** = click on the magnifying and select the evaluator who will complete the LOC for this individual. You can assign yourself if you will do it
    4. **Assessment Date =** can be todays 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
GTKYV Scheduled
No
GTKYV Information
No
Primary Verification
No
Eligibility Info
Assessment Reason
Waiver
1
Request Type
Initial
2
Assigned Evaluator
g Greenecs
3
Assessment Date (Scheduled/Rescheduled)
6/10/2015
4
LOC Status
Not Started
Location for Initial Visit
--
Location Address
Date of Visit
--
LOC Effective Start Date
--
Assigned Eligibility Specialist
--
Waiver Type
IO
5
Best way to communicate(Preferred Method)
--
Age for Assessment
15
Proposed Effective Date
--
LOC Effective End Date
--
INDIVIDUAL DETAILS
Full Name
Sam Davis
DODD#
9989909
Date of Birth
6/6/2000
Age
15 yrs 0 mos
Email
--
Reporting County
GREE
Telephone
--
Waiver County
--
Waiver Start Date
--
Waiver End Date
--
Individual Waiver Type
--

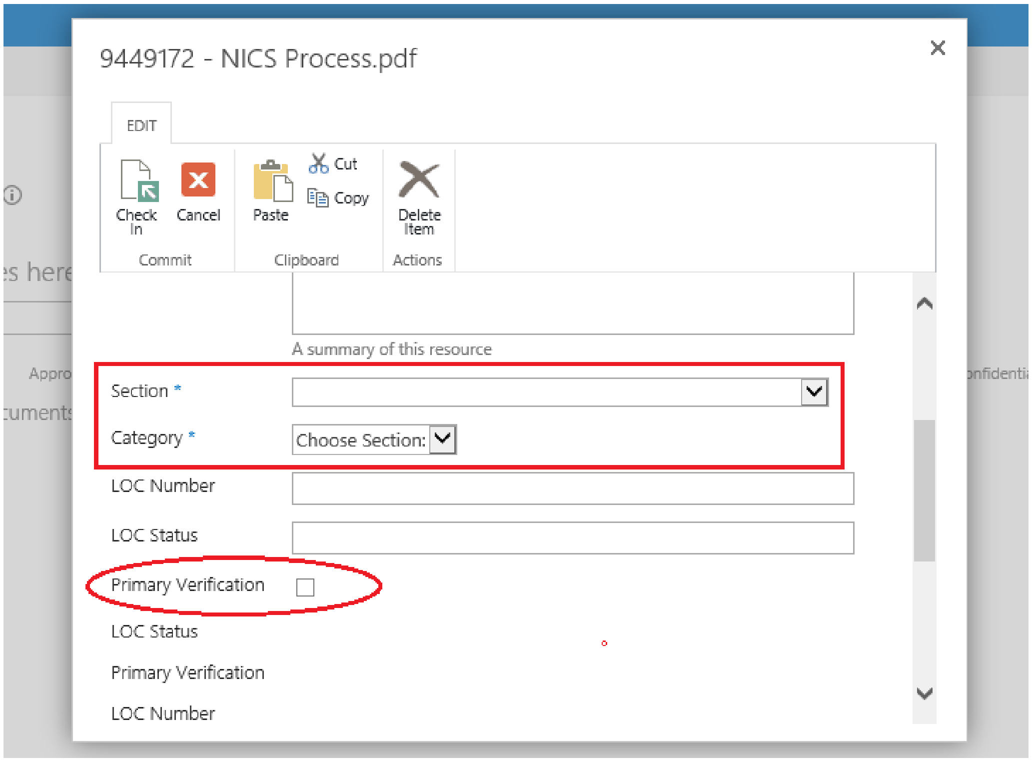
36. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document** to SharePoint
    10. Click on **+new document**
    11. Click on **chose file**



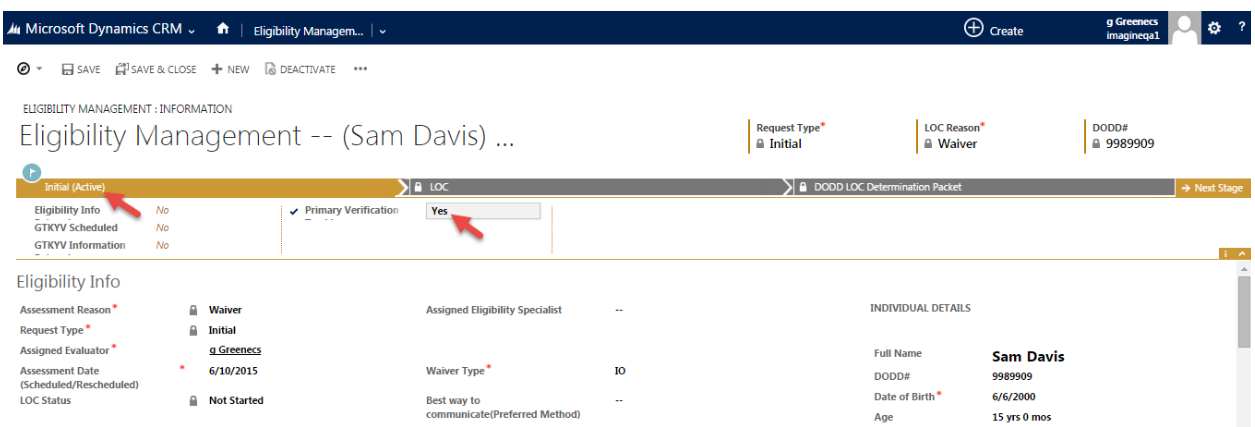
    12. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on "Open" once done selecting
    13. You will be back on previous screen → **Click on OK**



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

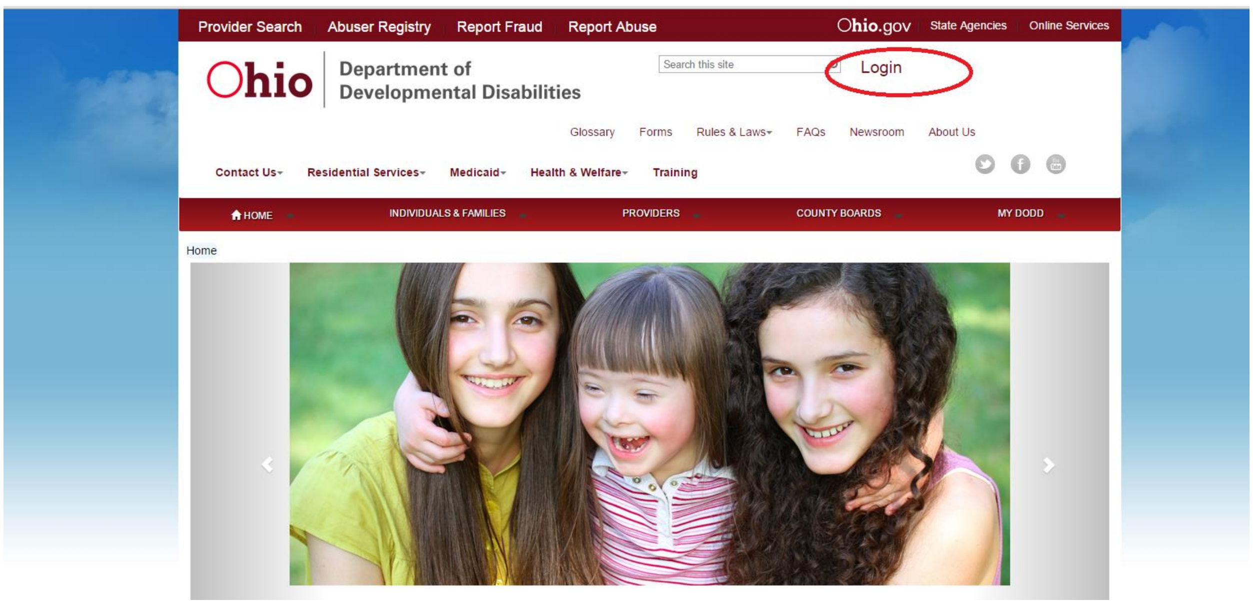


38. Cannot Move to **LOC stage** **(has to be an evaluator)**

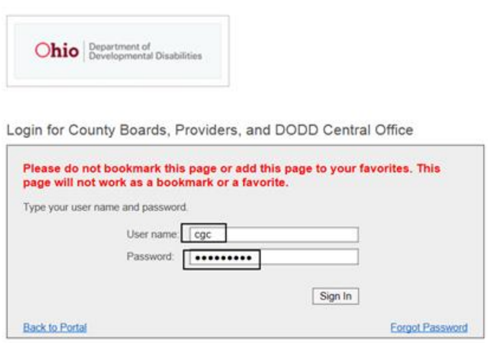
3. Service Support Administrator – SSA (IDS Read)

Login

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

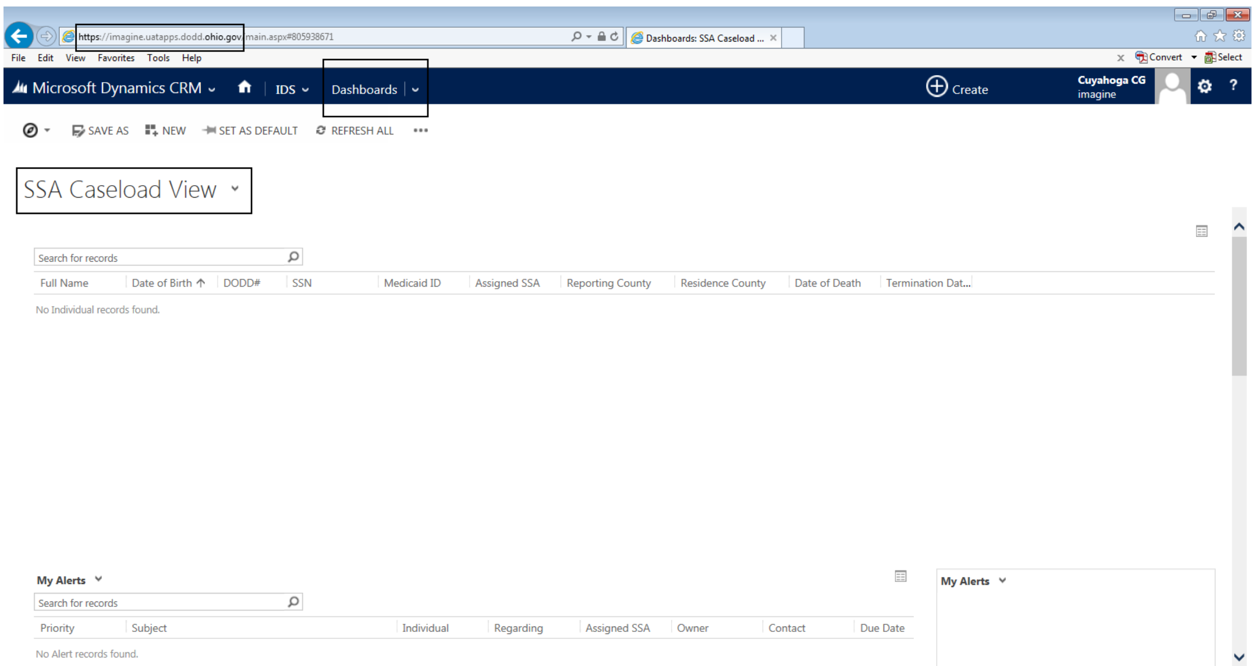


3. **Enter** your **User Name** and **Password** **(Role: SSA)**



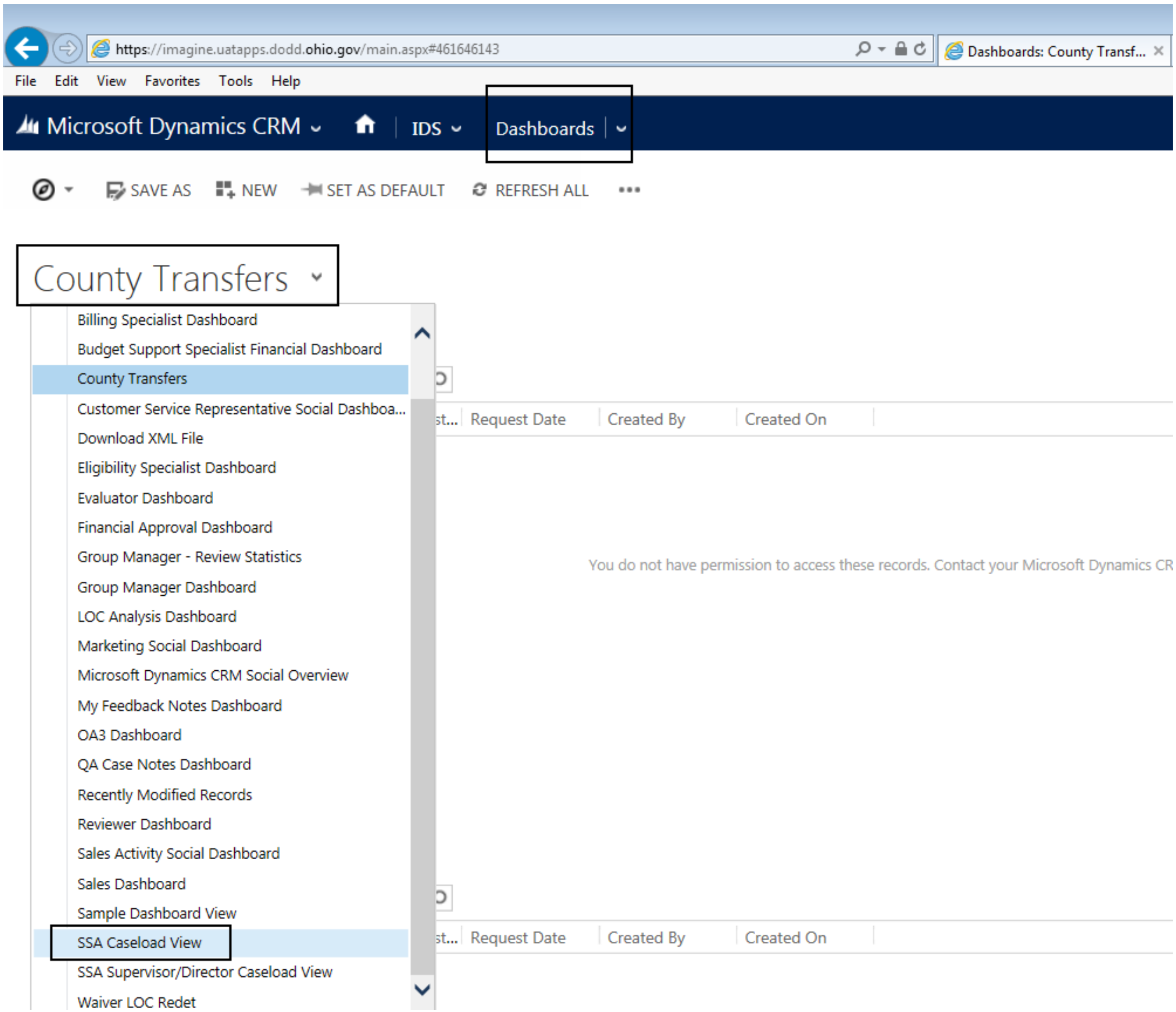
Dashboard

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

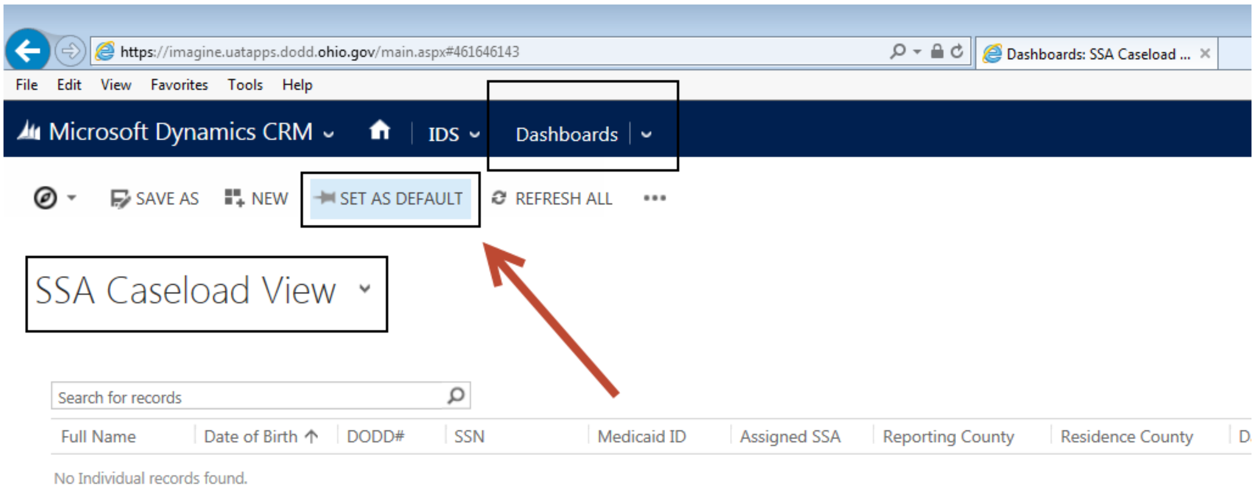


5. If you don't see the SSA Caseload View:

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.


https://imagine.uatapps.dodd.ohio.gov/main.aspx#461646143
Dashboards: County Transf...
File Edit View Favorites Tools Help
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

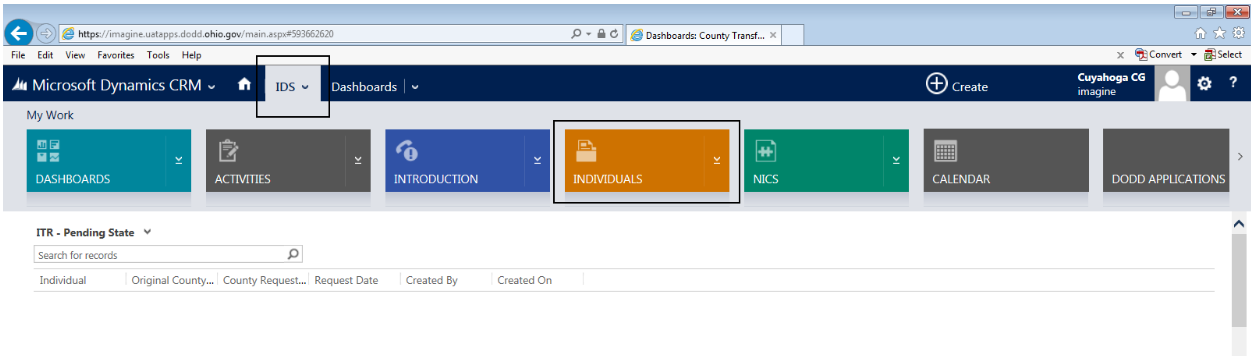
4. Finally, click on "Set as Default" on top of this dashboard page if you wish to pin this as your **Home** landing page.



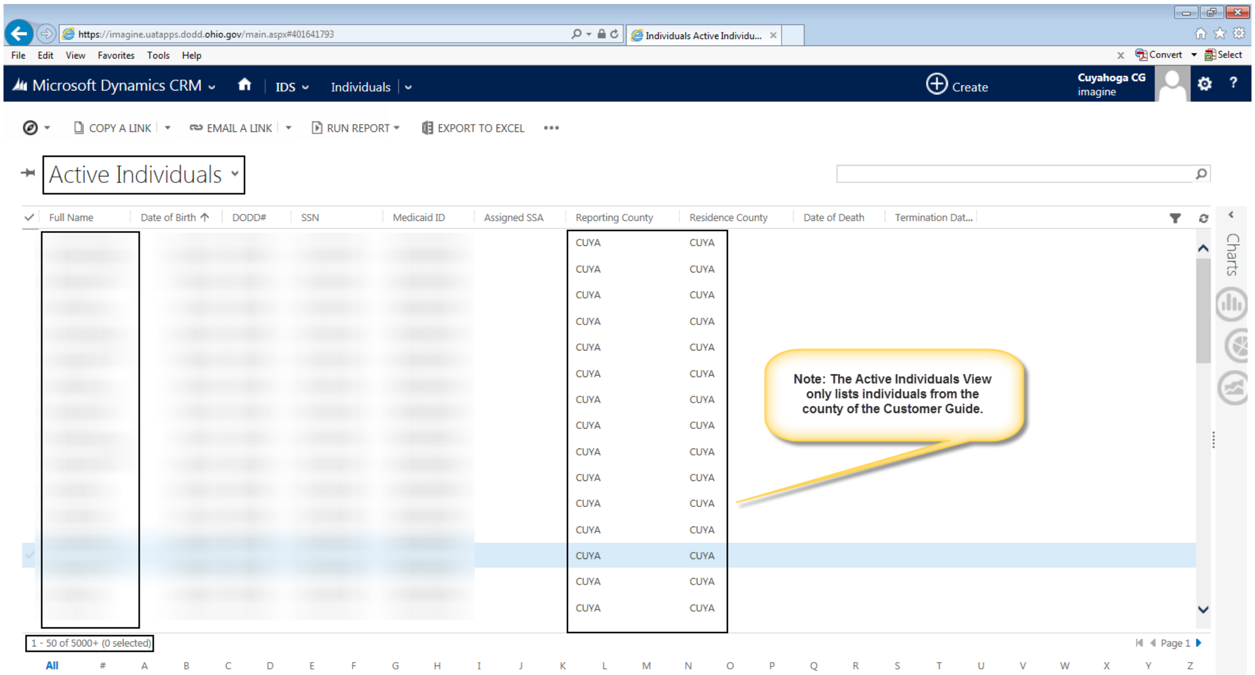
Access Individual

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

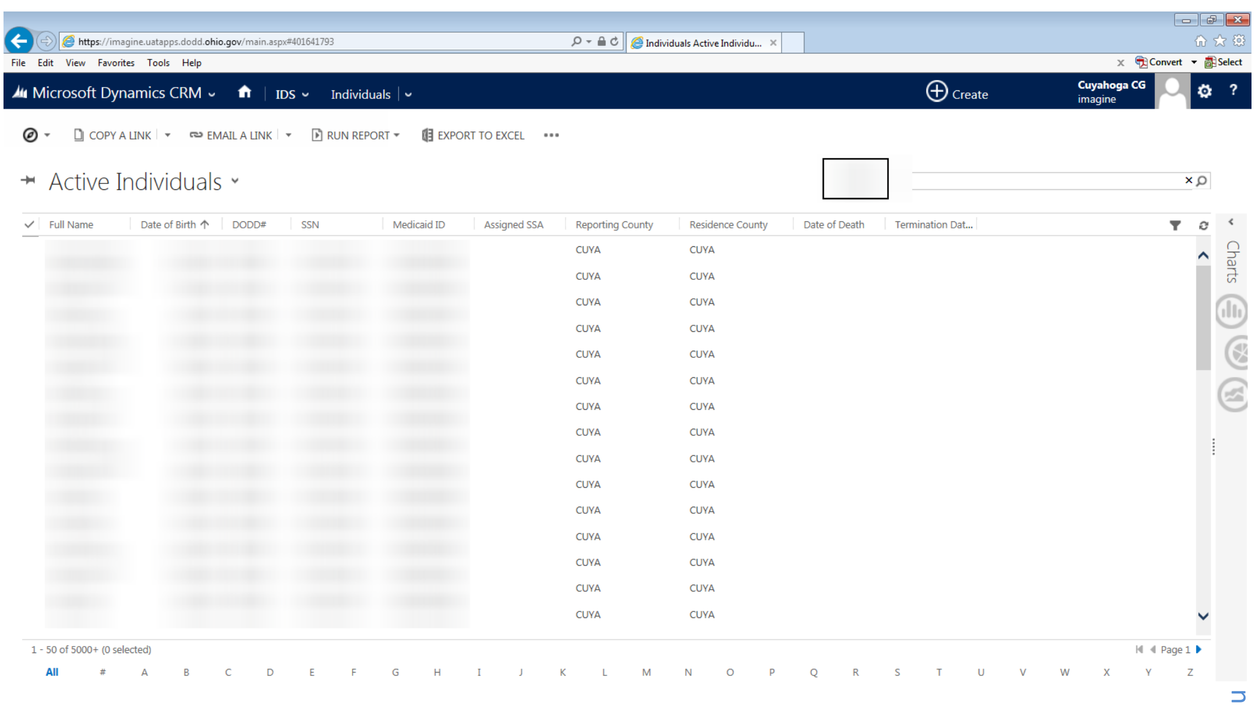
7. Follow these steps to Individual Search

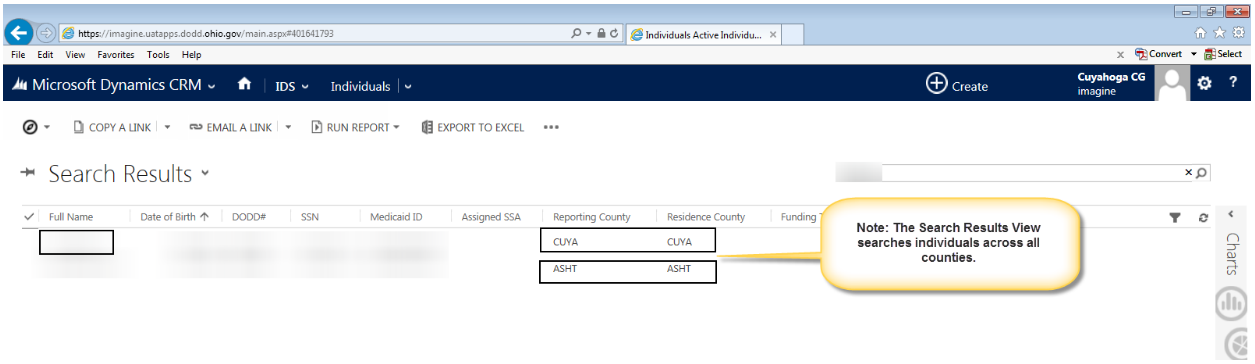
1. Search for individual by entering search criteria in the search box. Fields available to search on include: First Name, Last Name, Full Name (Ex. Jonathan Dawkins), Date of Birth, Medicaid #, SSN and DODD#.

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.



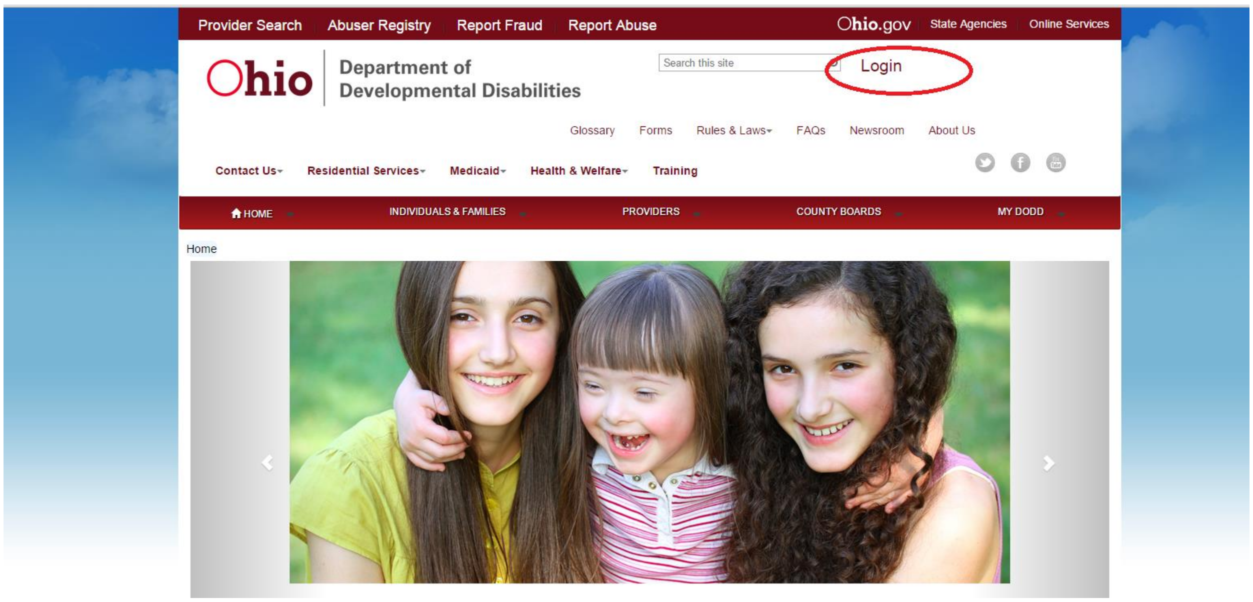

Microsoft Dynamics CRM
IDS
Individuals
Create
Cuyahoga CG
imagine
COPY A LINK
EMAIL A LINK
RUN REPORT
EXPORT TO EXCEL
Search Results
Full Name
Date of Birth
DODD#
SSN
Medicaid ID
Assigned SSA
Reporting County
Residence County
Funding
CUYA
CUYA
ASHT
ASHT
Note: The Search Results View searches individuals across all counties.
Charts

4. County Board Evaluator

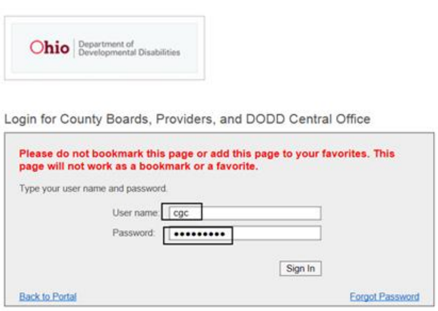
Note: This role is assigned in addition to any CRM access roles, once the LOC evaluator certification is achieved.

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)



Dashboard

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

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

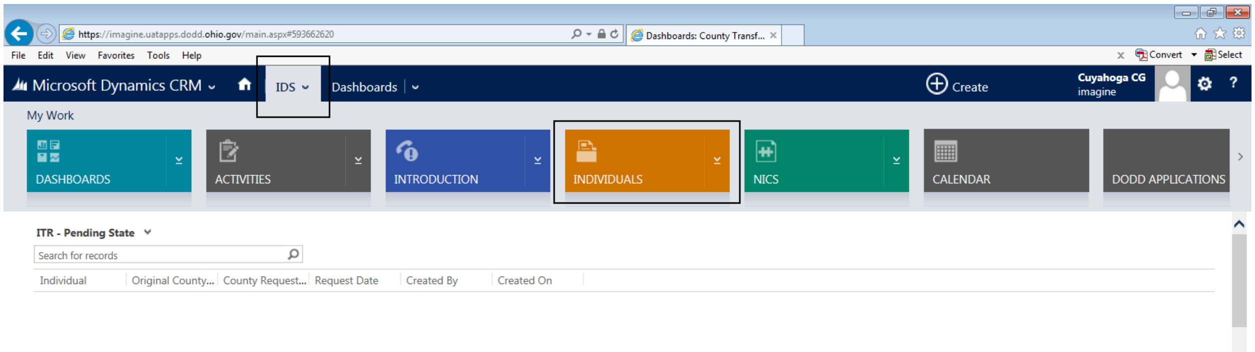
1. Click on the dropdown arrow next to the currently selected view.
2. Click on the view associated with the role you would like to open (ex. Evaluator Dashboard).
3. Once selected from the view selector dropdown the Evaluator Dashboard will be visible.
4. Finally, click on "**Set as Default**" on top 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.

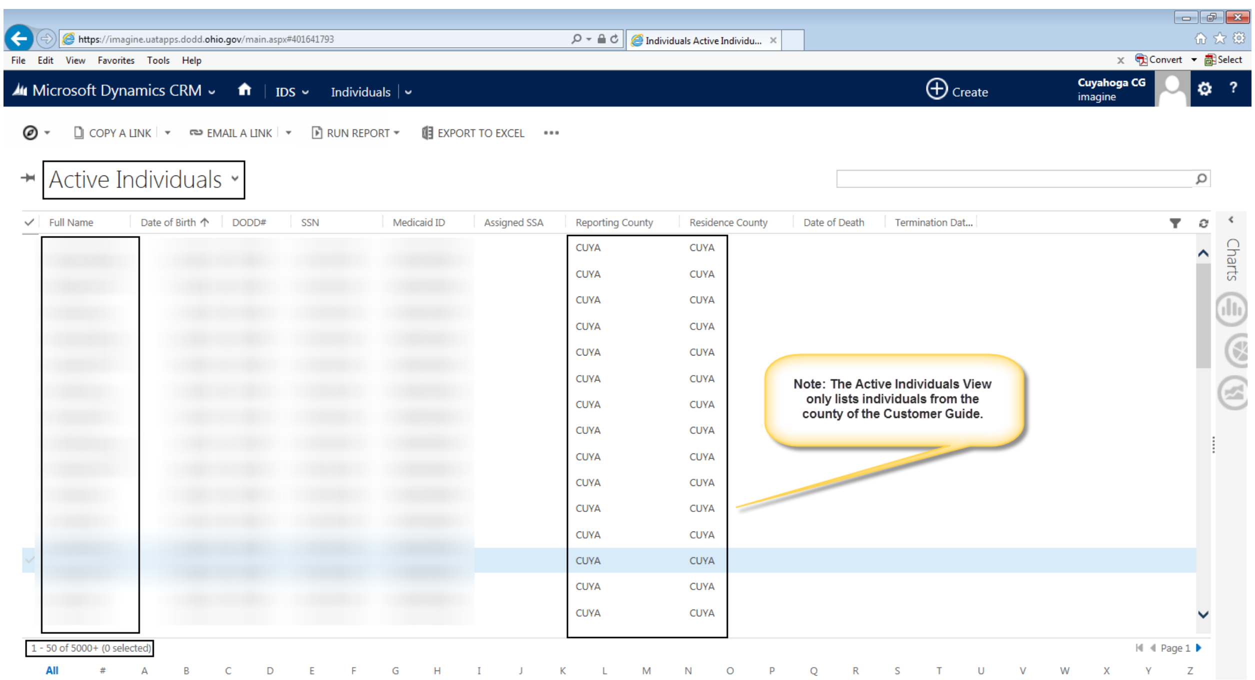
Access Individual

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.



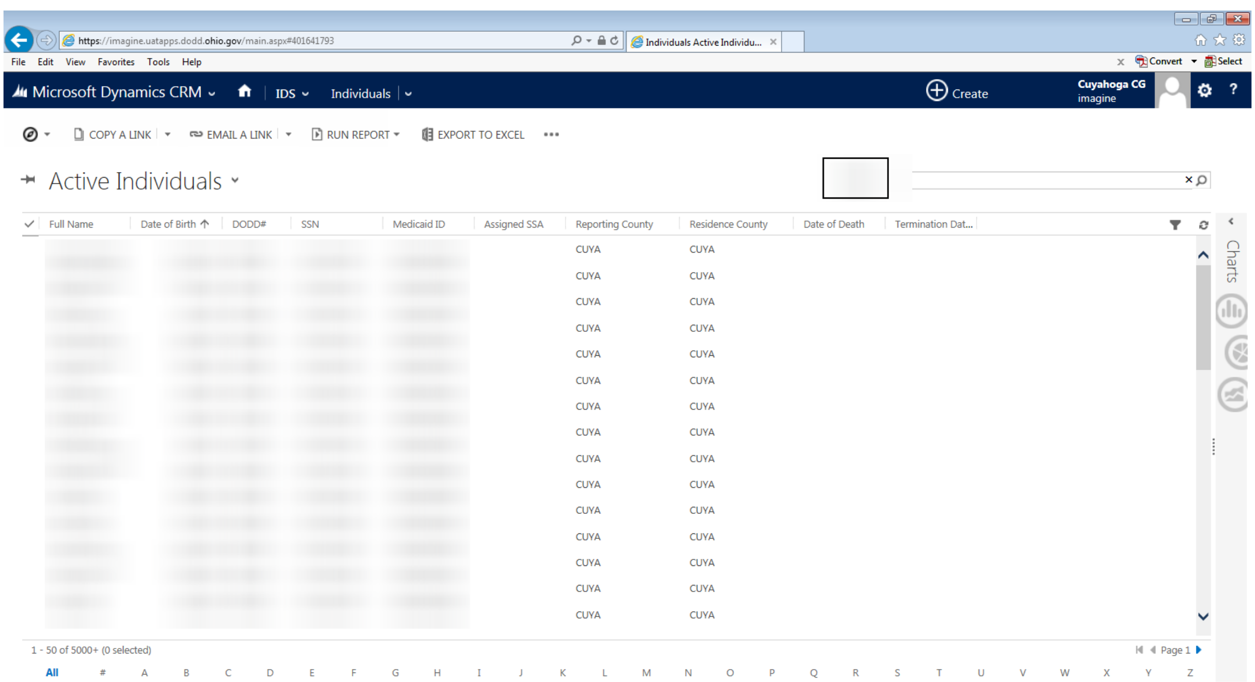
Search Individual

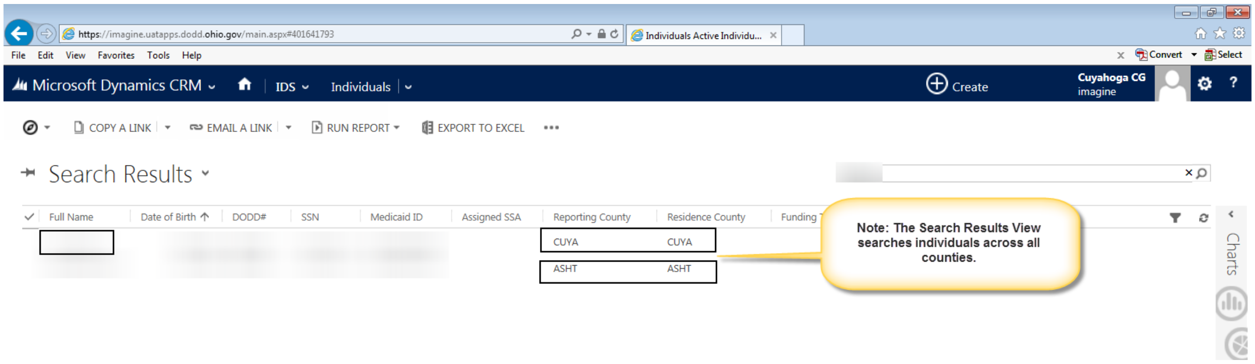
7. **Follow these steps to Individual Search**

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.

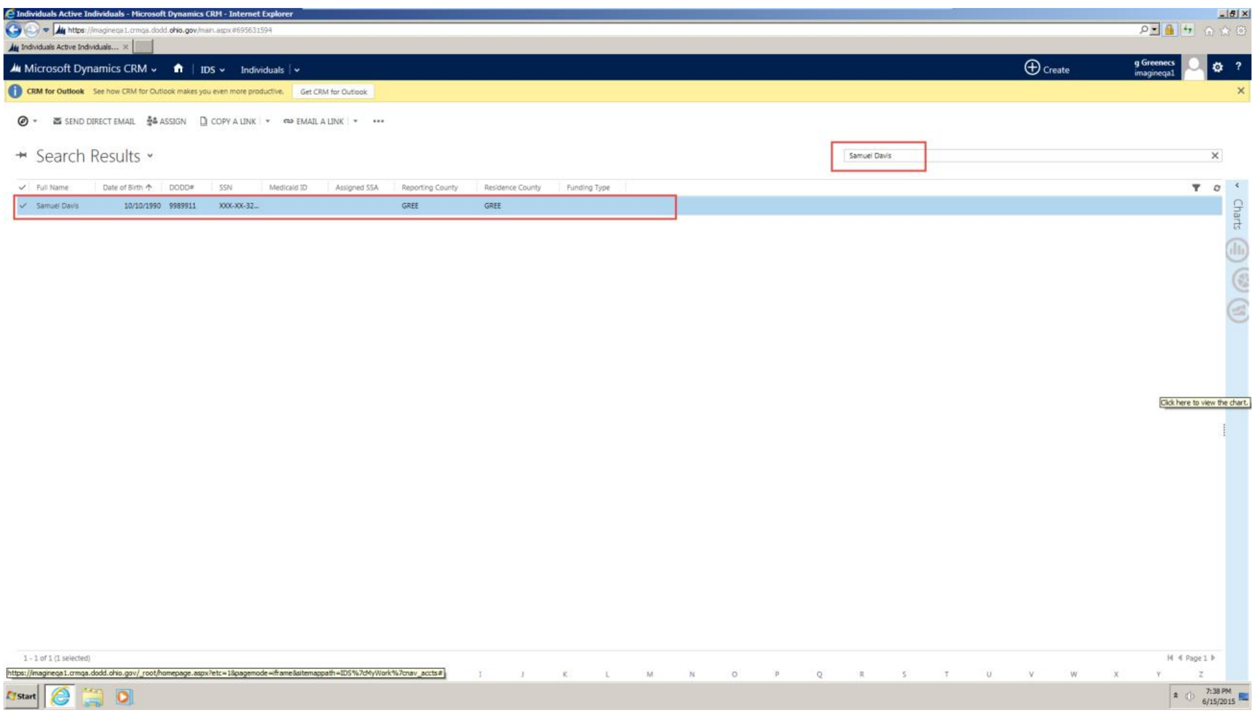
2. Hit **Enter** or click on the magnifying glass to search
3. Individual record(s) will be displayed if an individual exists in your associated counties.



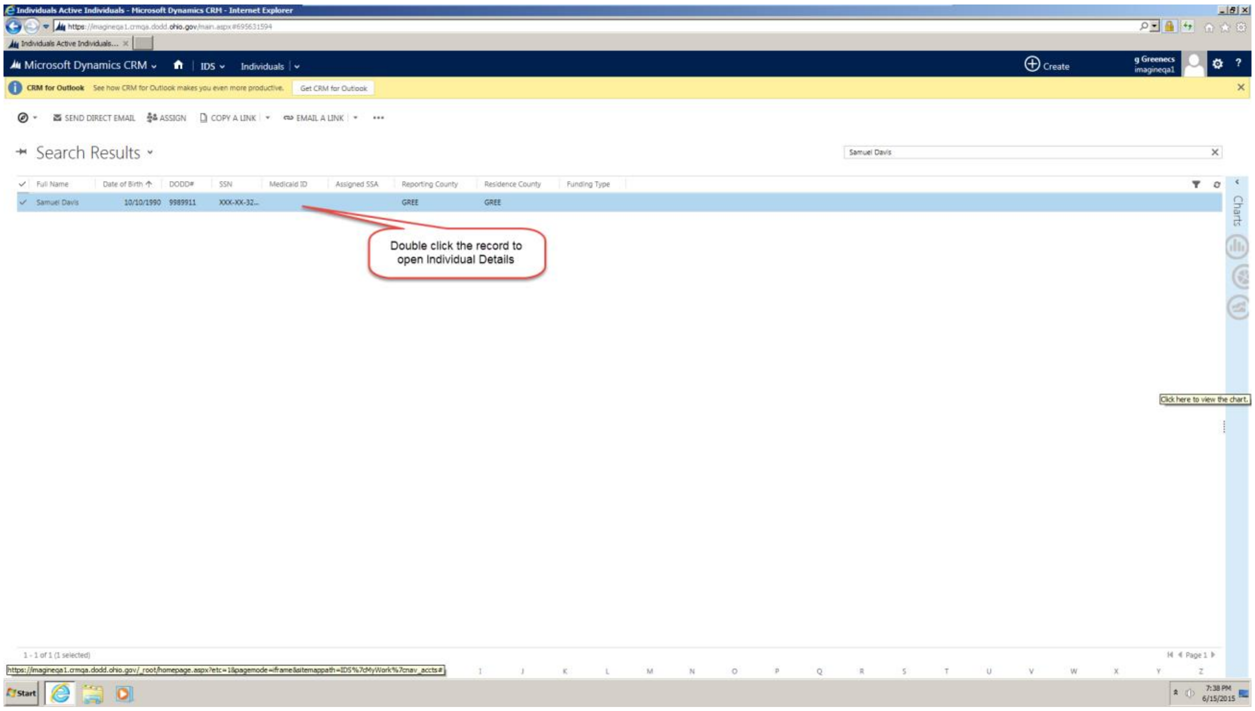

Microsoft Dynamics CRM
IDS
Individuals
Create
Cuyahoga CG
imagine
COPY A LINK
EMAIL A LINK
RUN REPORT
EXPORT TO EXCEL
Search Results
Full Name
Date of Birth
DODD#
SSN
Medicaid ID
Assigned SSA
Reporting County
Residence County
Funding
CUYA
CUYA
ASHT
ASHT
Note: The Search Results View searches individuals across all counties.
Charts

Decision Tree for County Board Eligibility

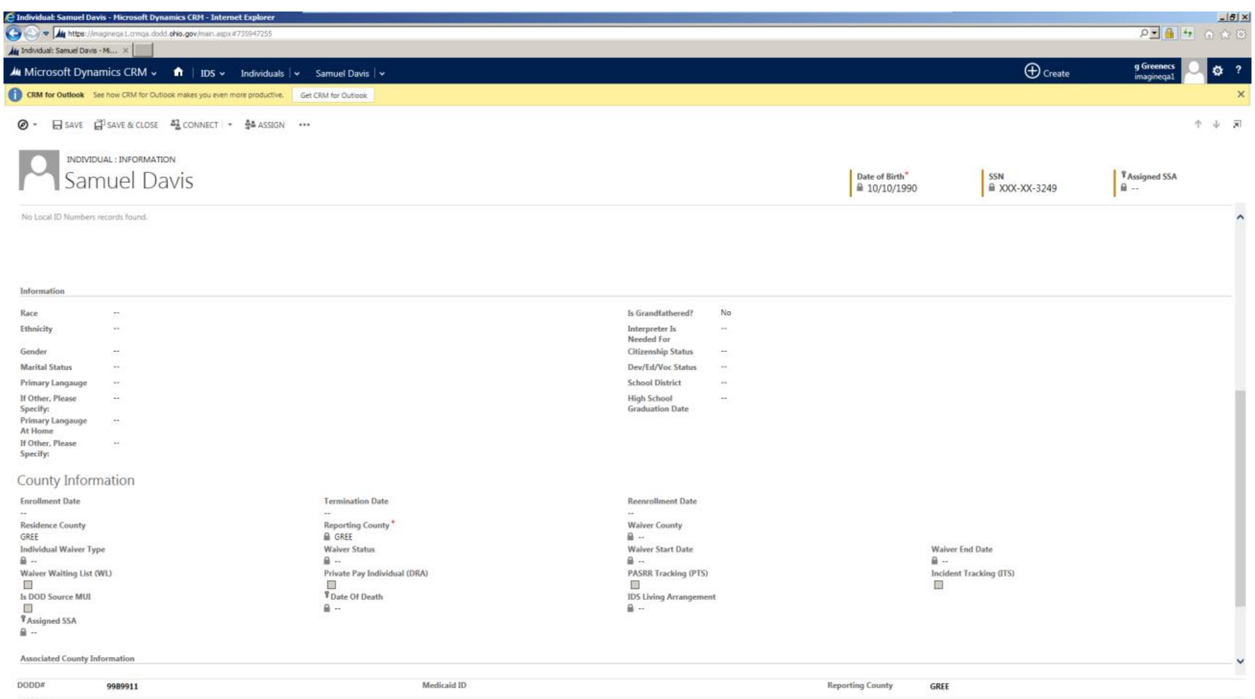
1. To start county board eligibility for an Individual, Search for individual by typing name in search box.
2. Hit **Enter** or click on the magnifying glass next to search box.
3. **Individual record will show up** if individual exist in your county



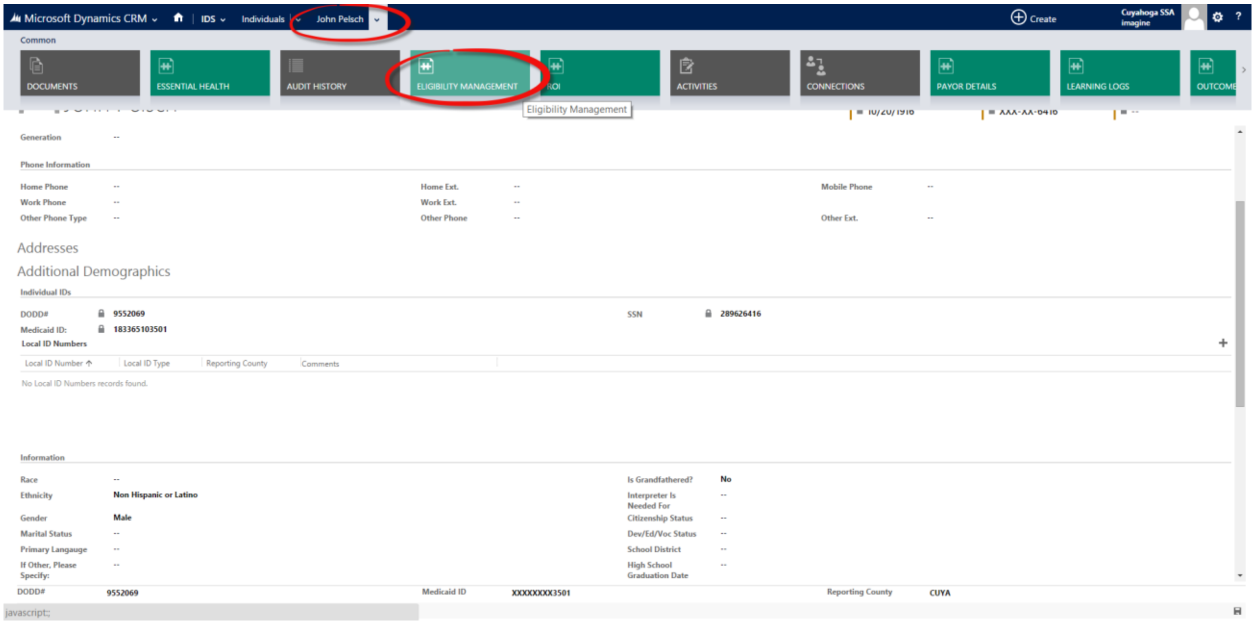
4. Double click on individual record to open individual's record



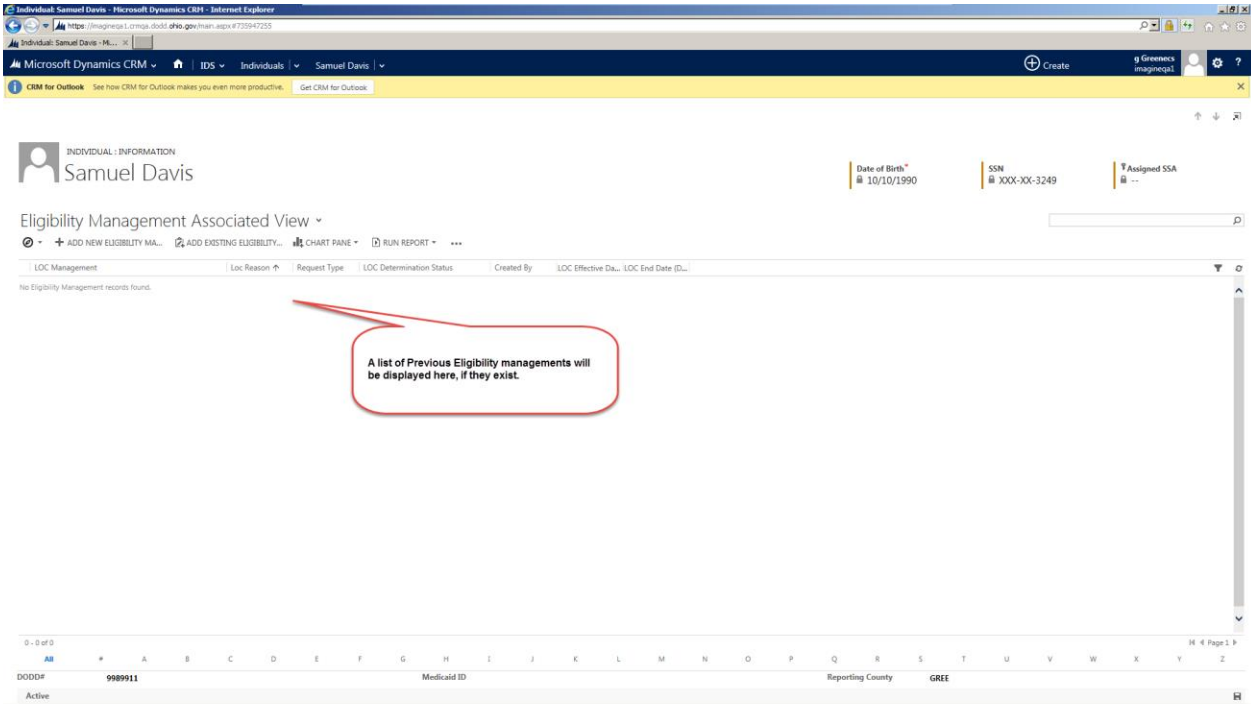
5. User will land on **Individual front page.**



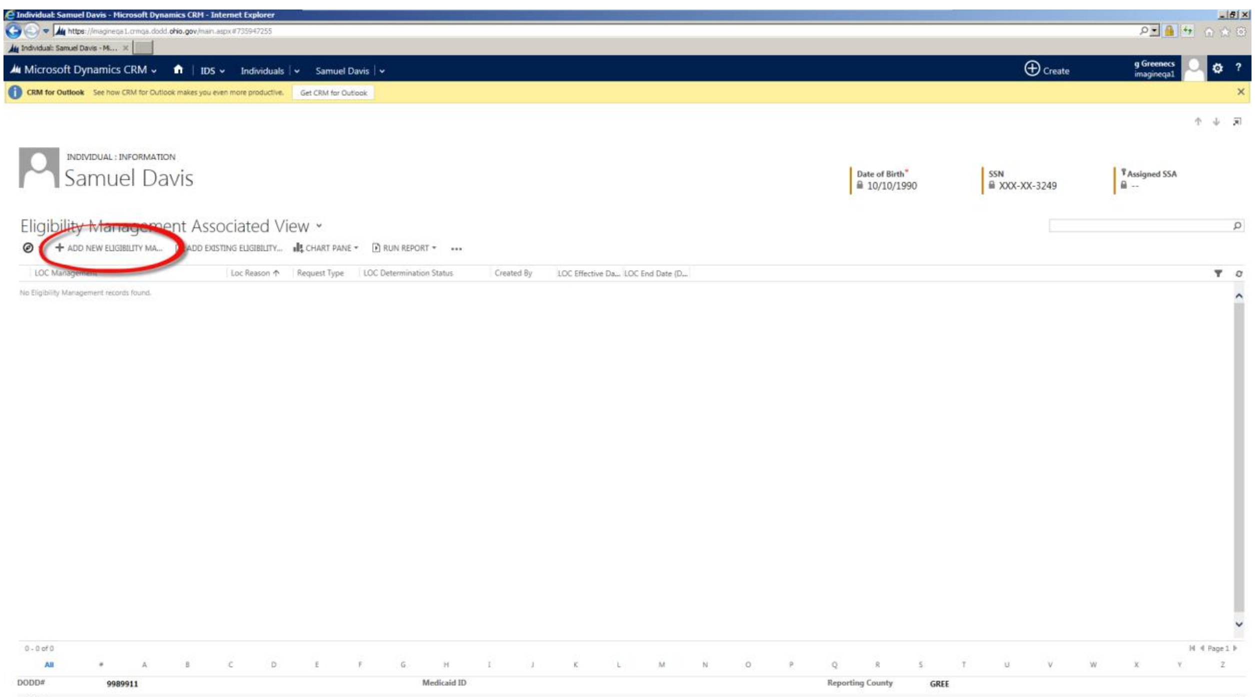
6. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



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



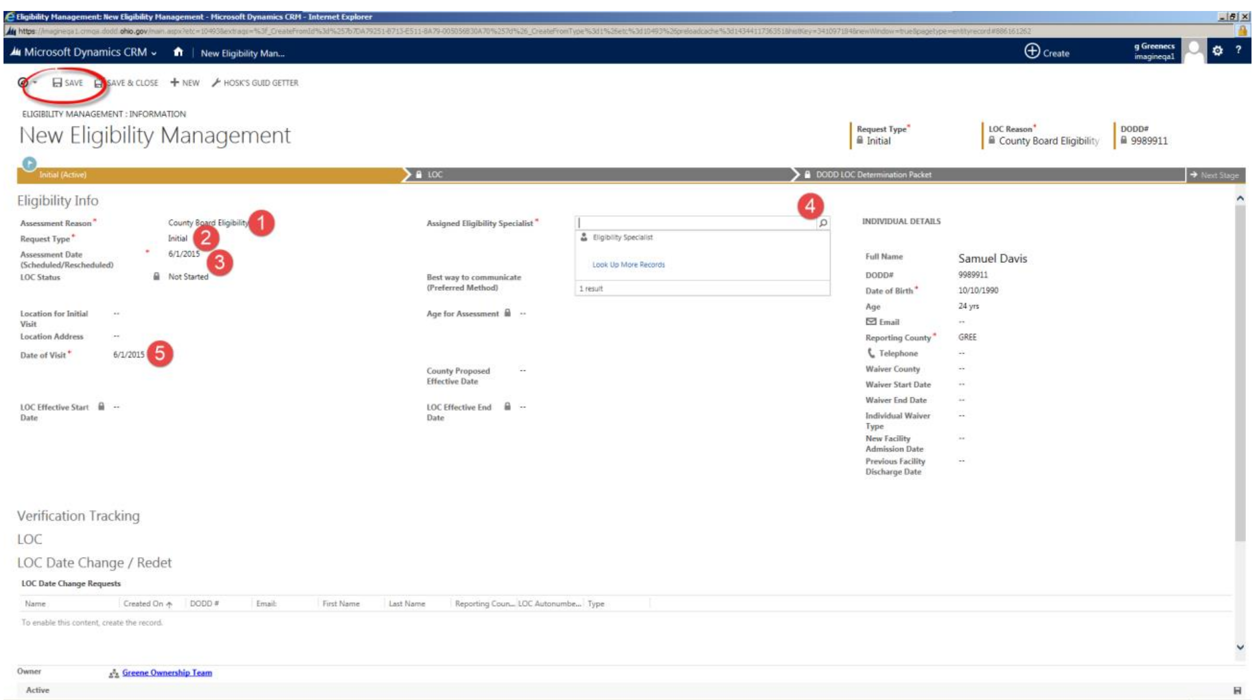
8. Add New Eligibility Management



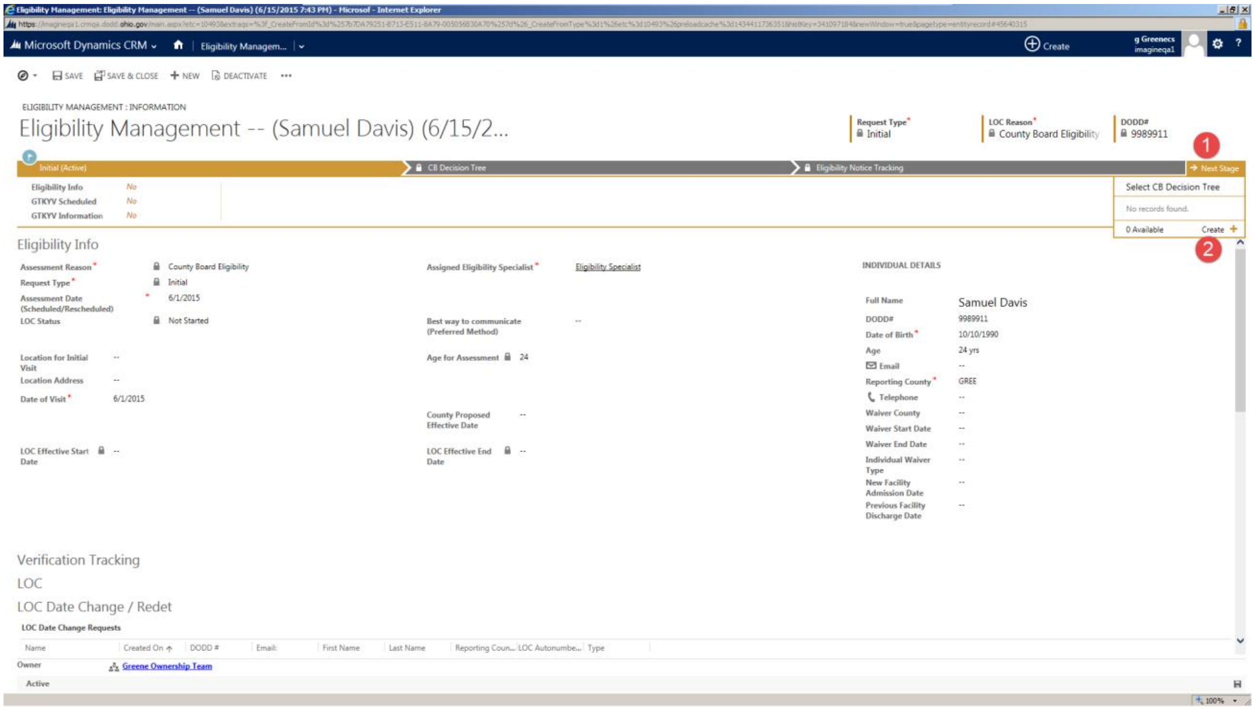
9. Enter required information on **Initial stage** to Save Eligibility management

1. **Assessment Reason** = select County Board Eligibility
2. **Assessment Type** = Initial
3. **Assessment Date =** can be todays 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 todays or past date – it's when you met with individual to capture this information

Click on Save button.

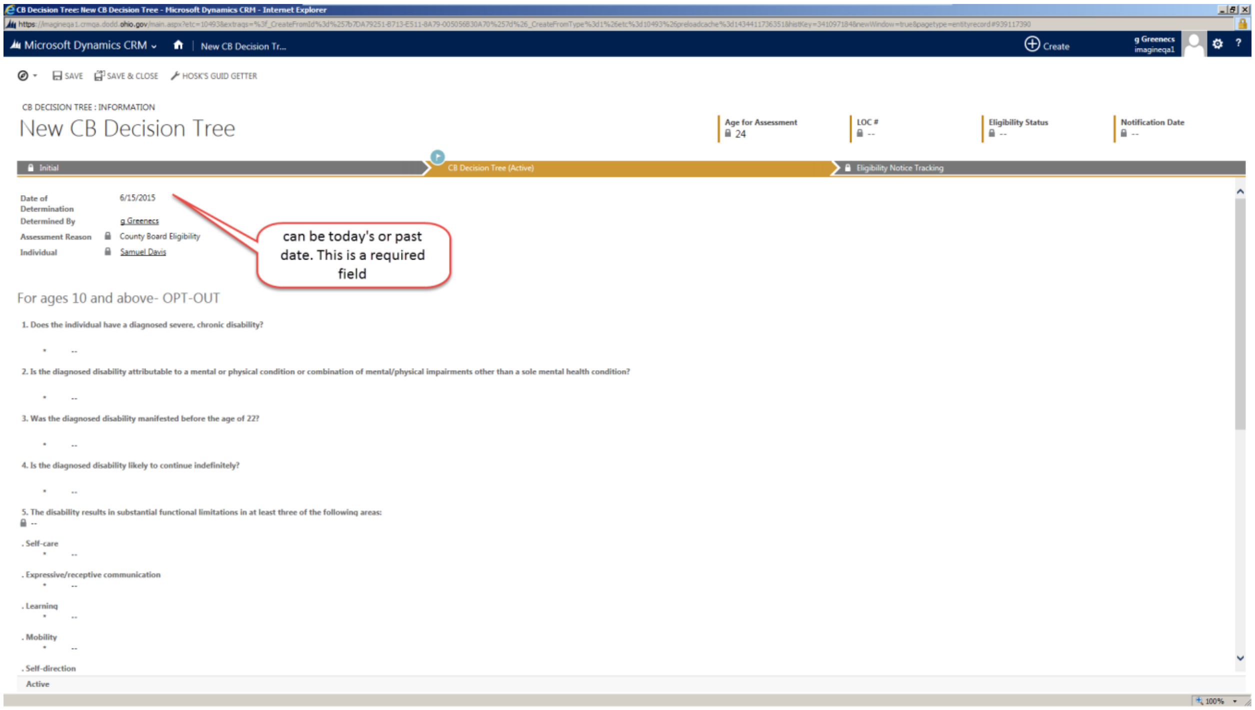


10. Move to **Decision Tree stage →** by clicking on the **“Next Stage”** and **Create+** on Next Stage



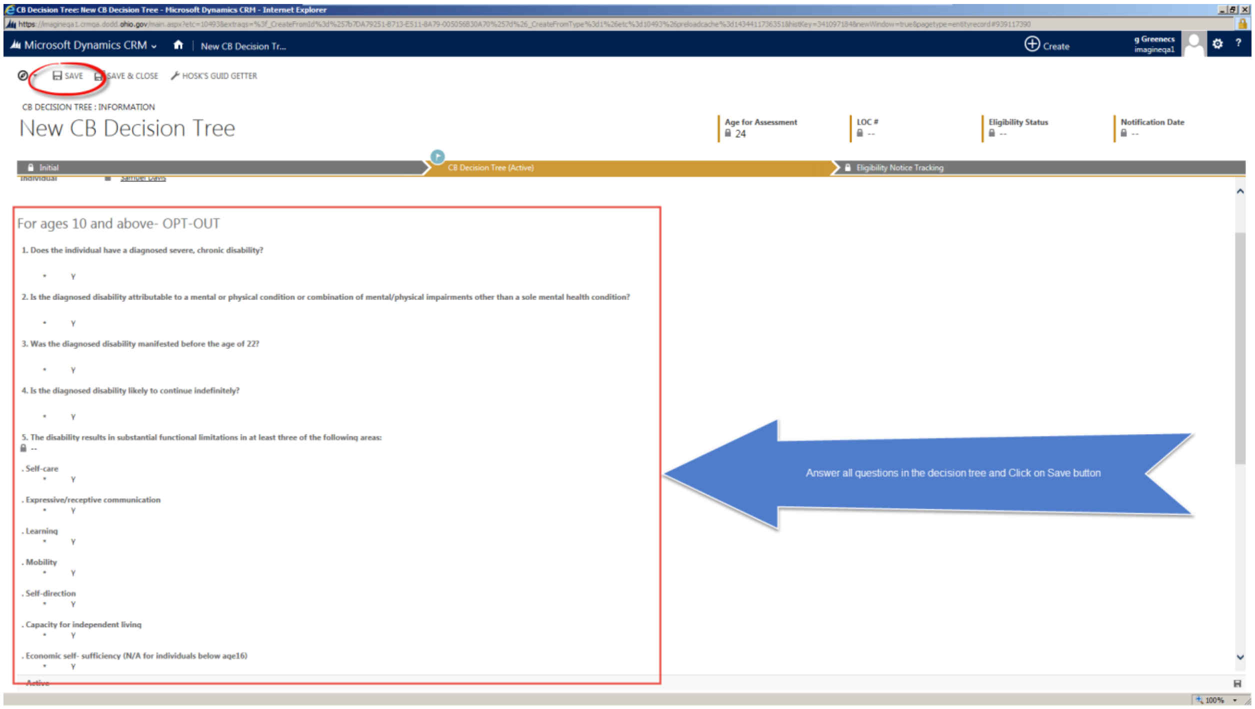
NOTE: The decision tree is available based on the individual’s present age (Birth to 2, 3 to 5, 6 to 9 and 10 and above).

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

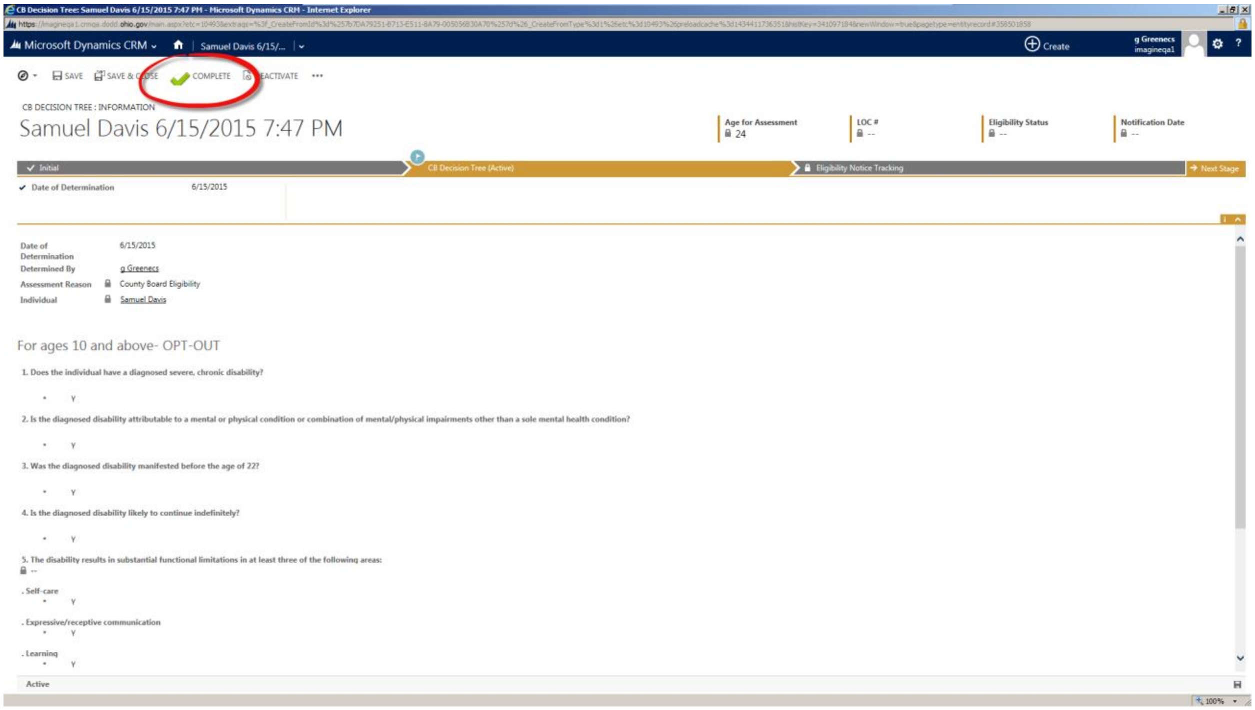


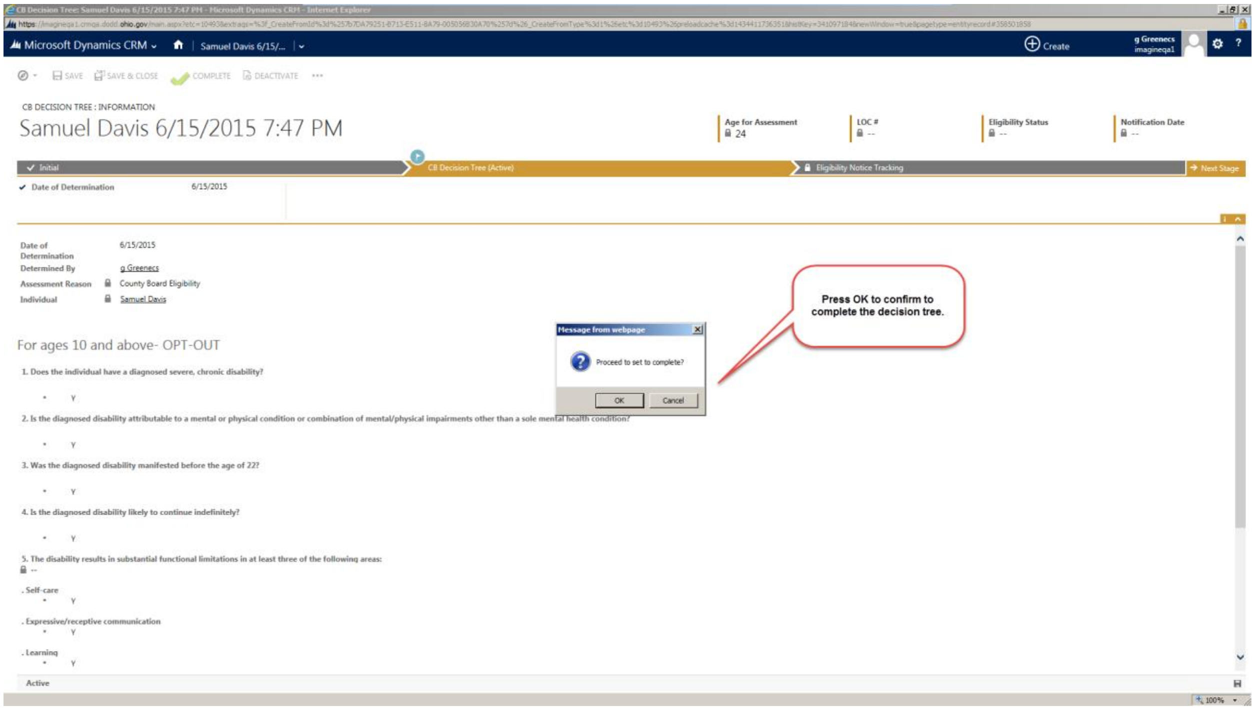
12. Answer all the questions on **Decision Tree**

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

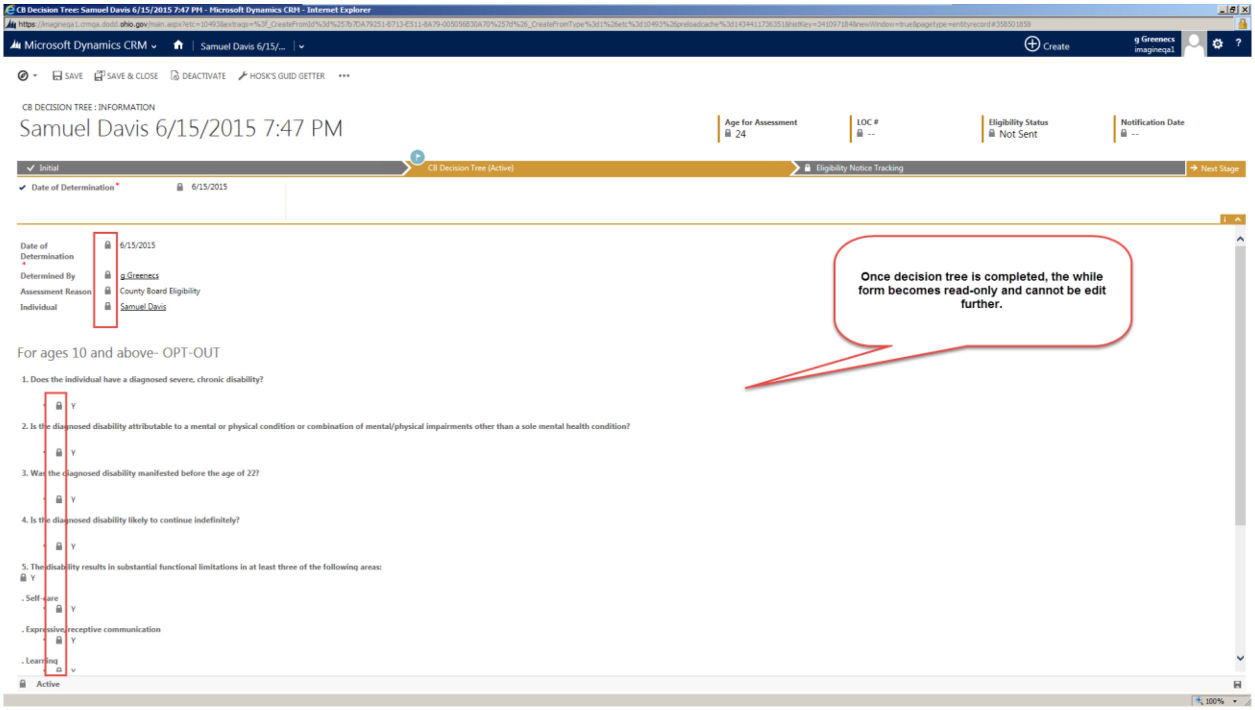

CB Decision Tree: New CB Decision Tree - Microsoft Dynamics CRM - Internet Explorer
Microsoft Dynamics CRM
New CB Decision Tr...
Create
SAVE
SAVE & CLOSE
HOSK'S GUID GETTER
CB DECISION TREE : INFORMATION
New CB Decision Tree
Age for Assessment
24
LOC #
Eligibility Status
Notification Date
Initial
CB Decision Tree (Active)
Eligibility Notice Tracking
For ages 10 and above- OPT-OUT
1. Does the individual have a diagnosed severe, chronic disability?
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
. Capacity for independent living
. Economic self- sufficiency (N/A for individuals below age16)
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

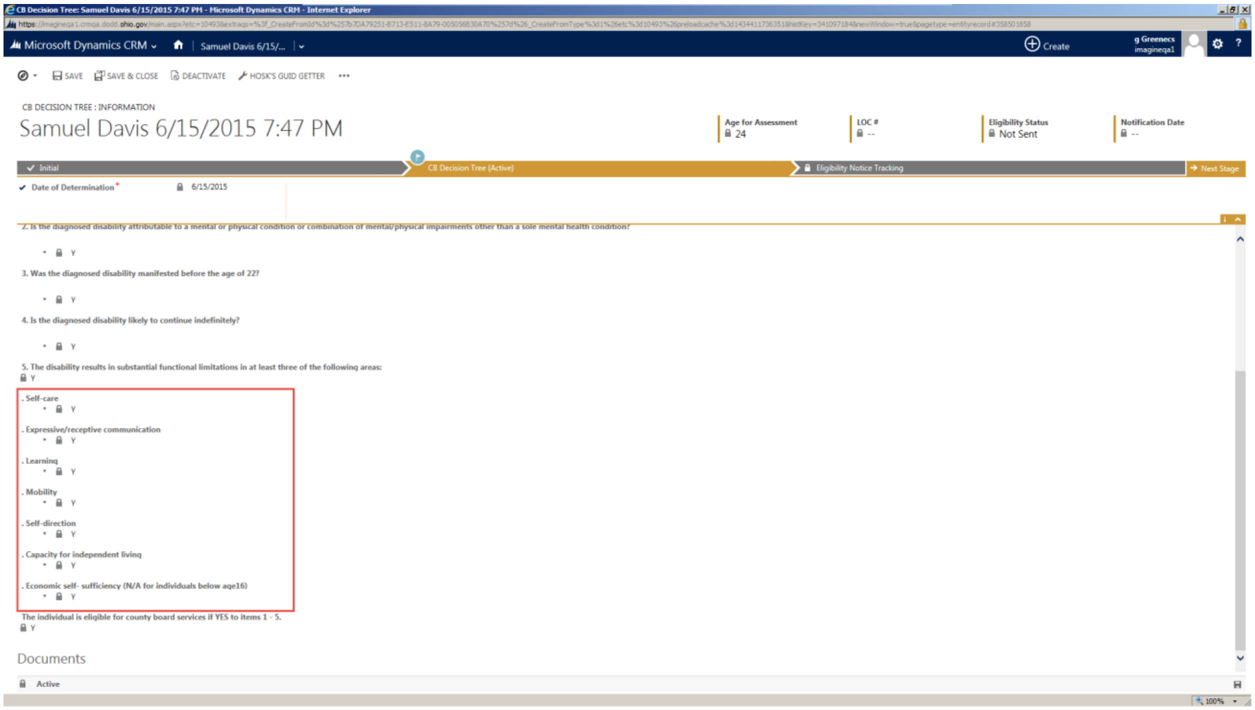




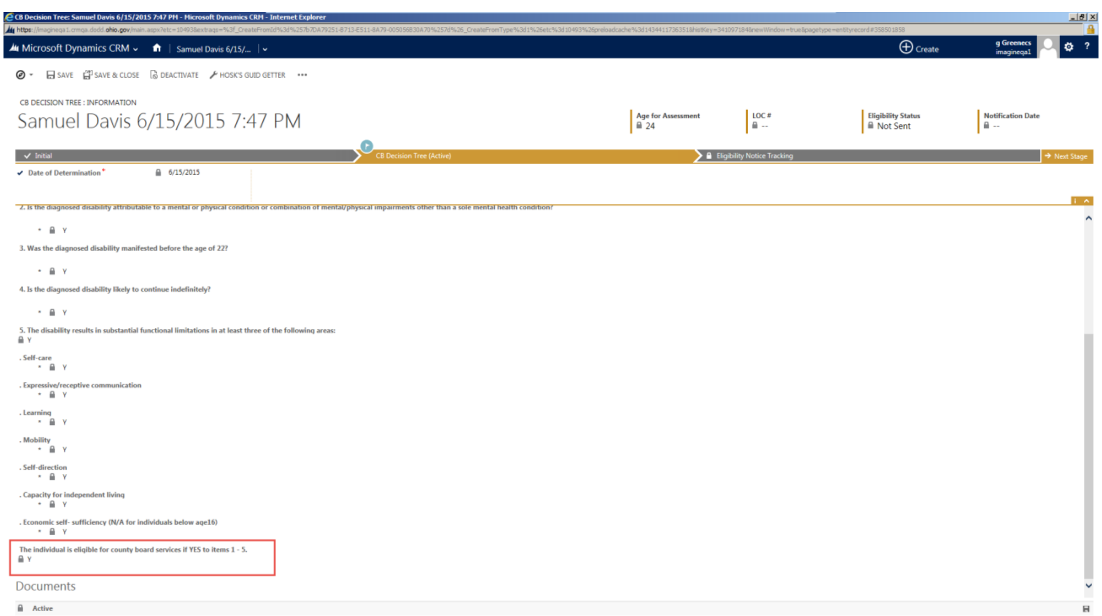
15. Once Decision Tree is Completed→ **Decision Tree becomes read only;** user will see the lock symbol next to all the fields and cannot edit anything now.



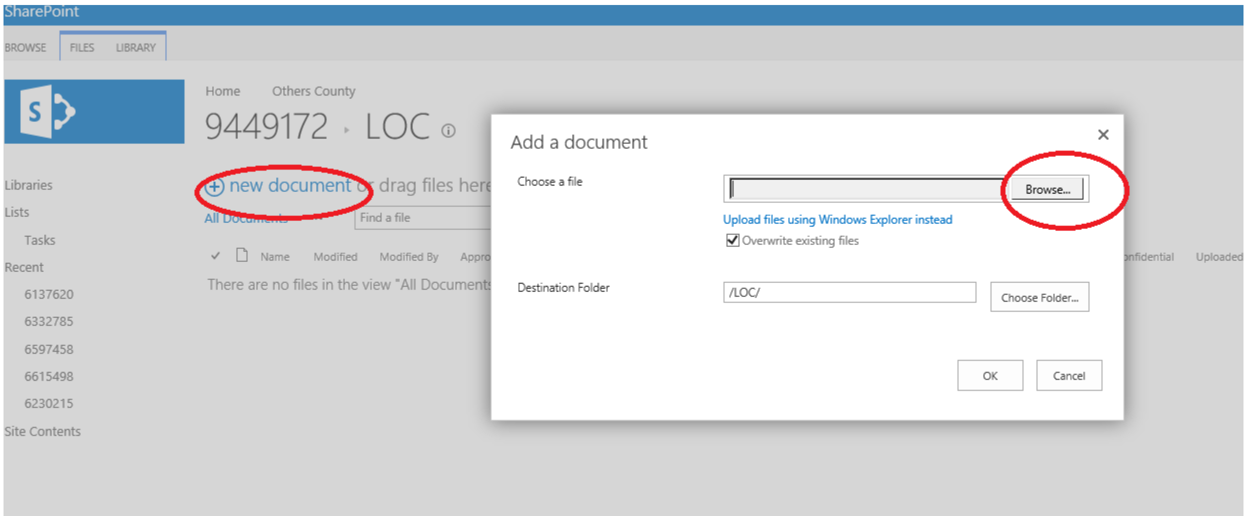
16. User can view **Y/N answer for question 5** after Decision Tree is Completed



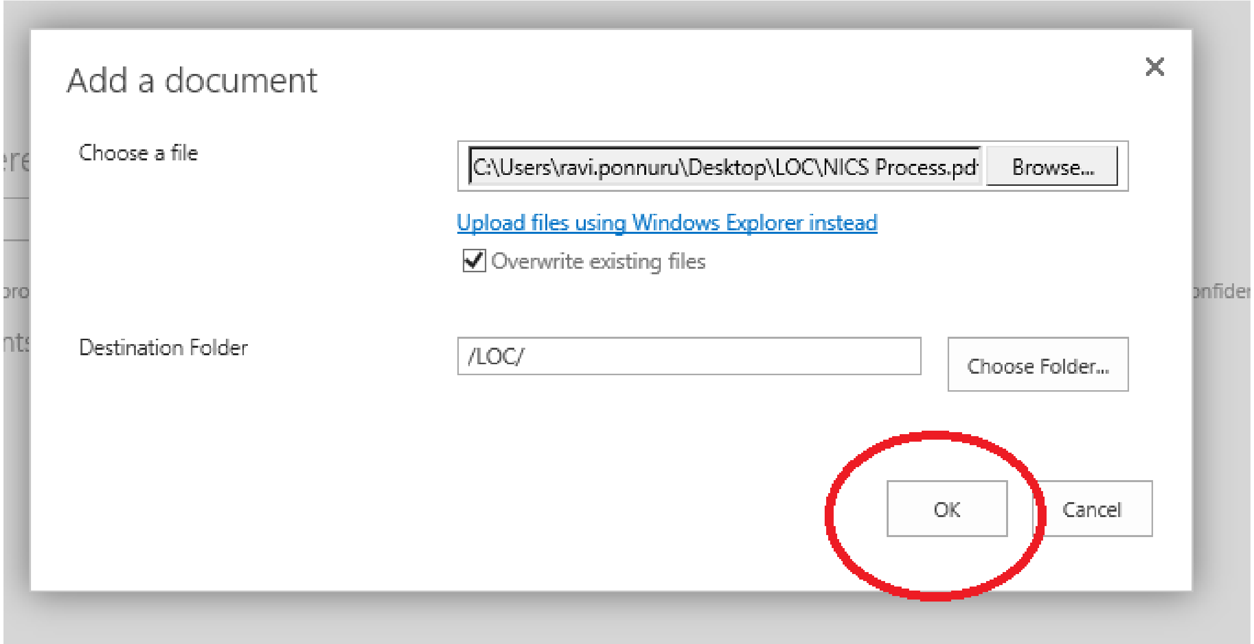
17. User will see a **YES/NO for if individual is county board eligible** once the Decision Tree is Completed.



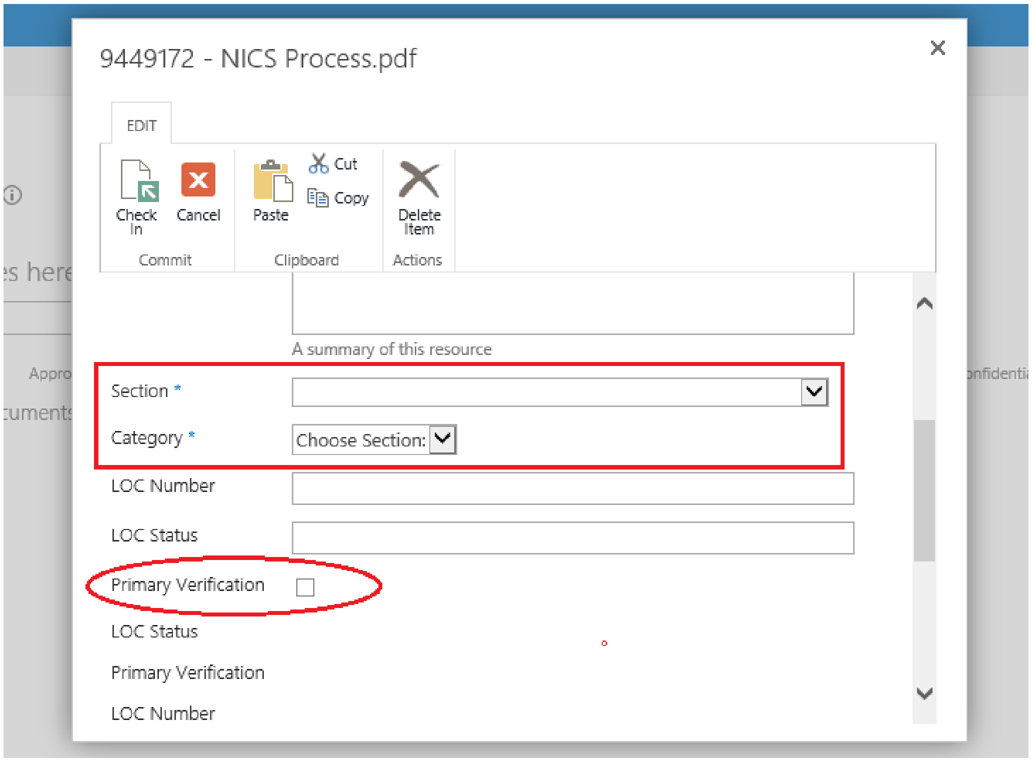
18. You can upload document to SharePoint at any time – before or after Completing the Decision Tree
19. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document** to SharePoint
    1. Click on **+new document**
    2. Click on **chose file**



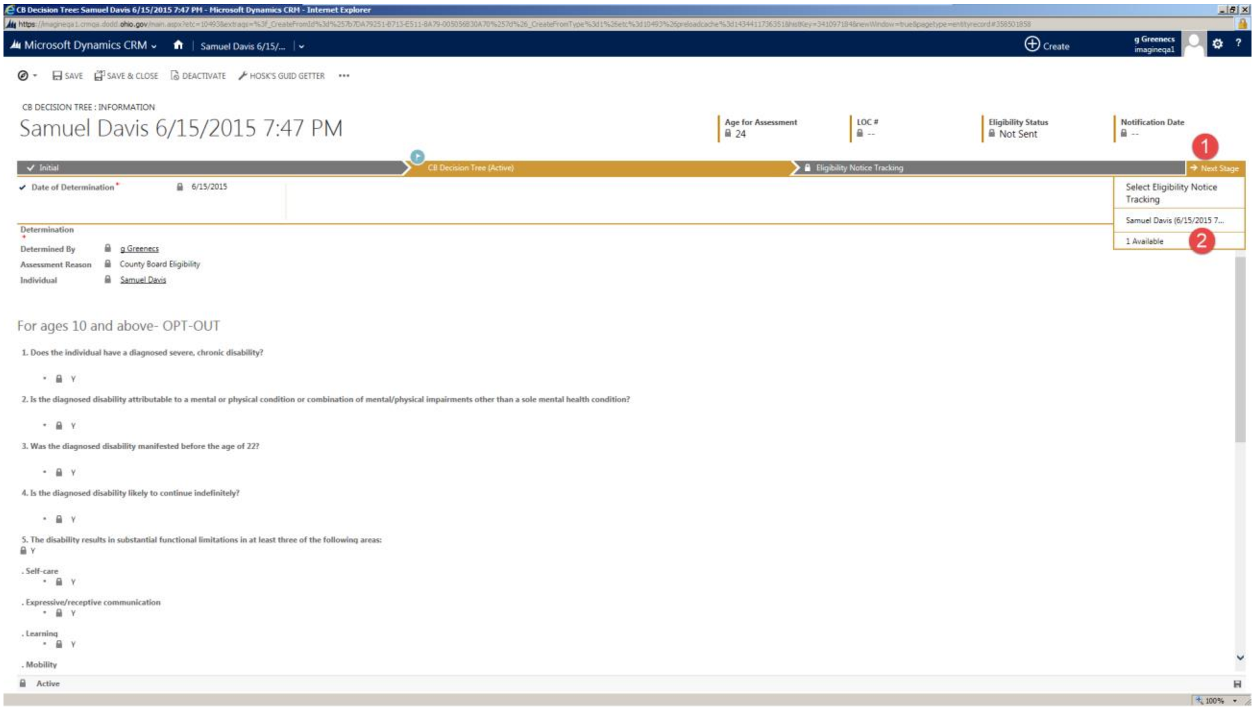
3. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on “Open” once done selecting
4. You will be back on previous screen → **Click on OK**



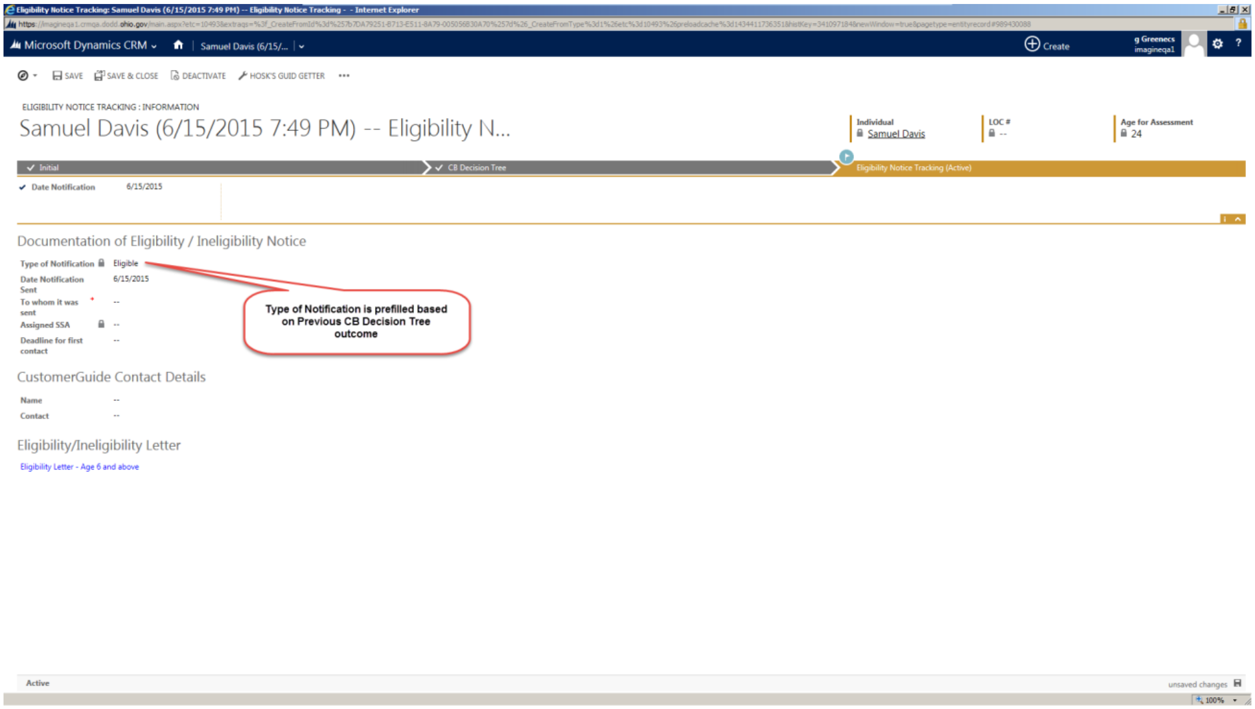
5. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
6. **Add Section →** Select "**LOC**" from the option set
7. **Add Category→** Select the reason for what you are uploading the document → in this case it should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

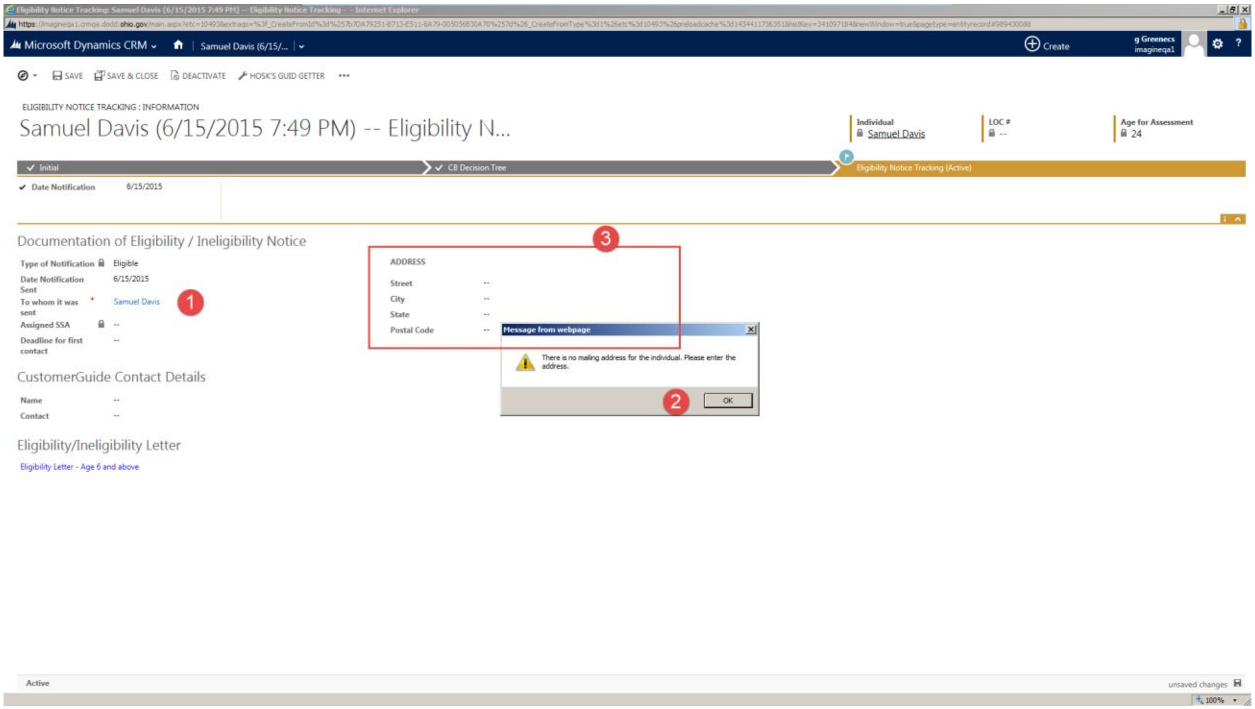
20. Move to **Eligibility Notice Tracking stage →** by clicking
    1. on the **"Next Stage"** and
    2. **Select the Eligibility Notice that is available.**



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)

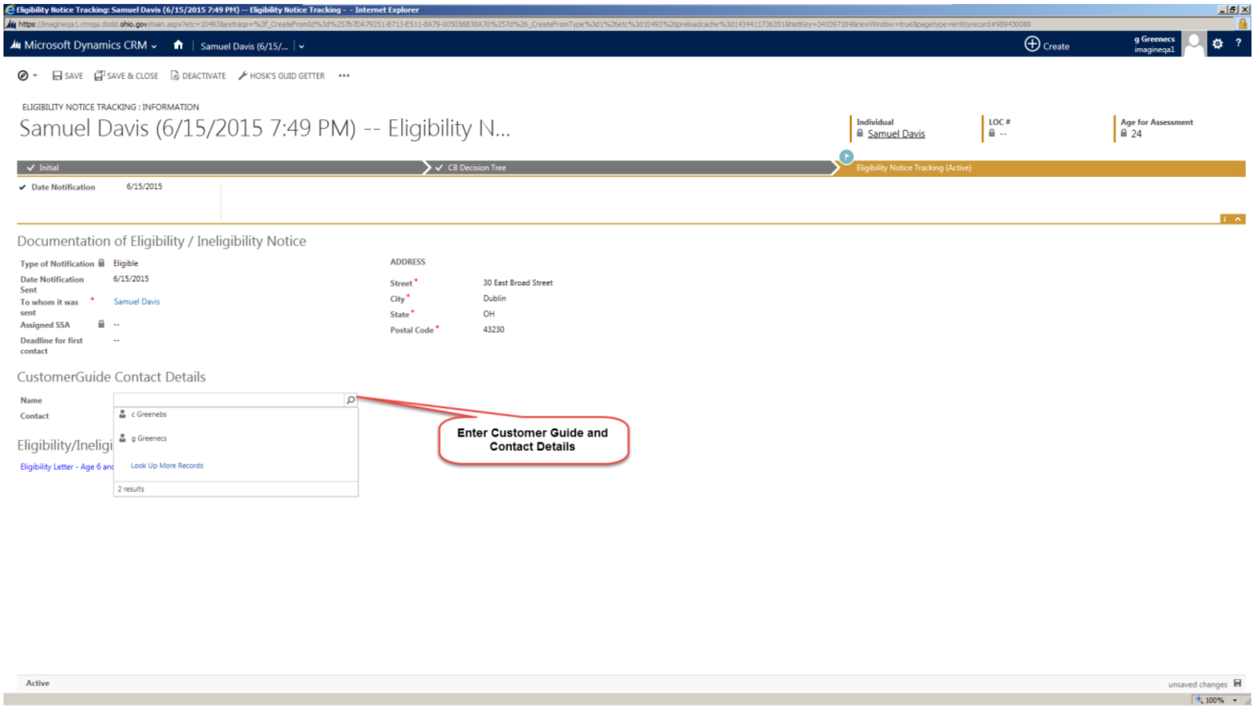


4. Enter **Date notification Sent** – date when you will send this notification to the individual. Not a required field.
5. Fill in **To Whom it was Sent**
    1. By selecting the Individual's name or individual's parent or guardian's name from the option set.

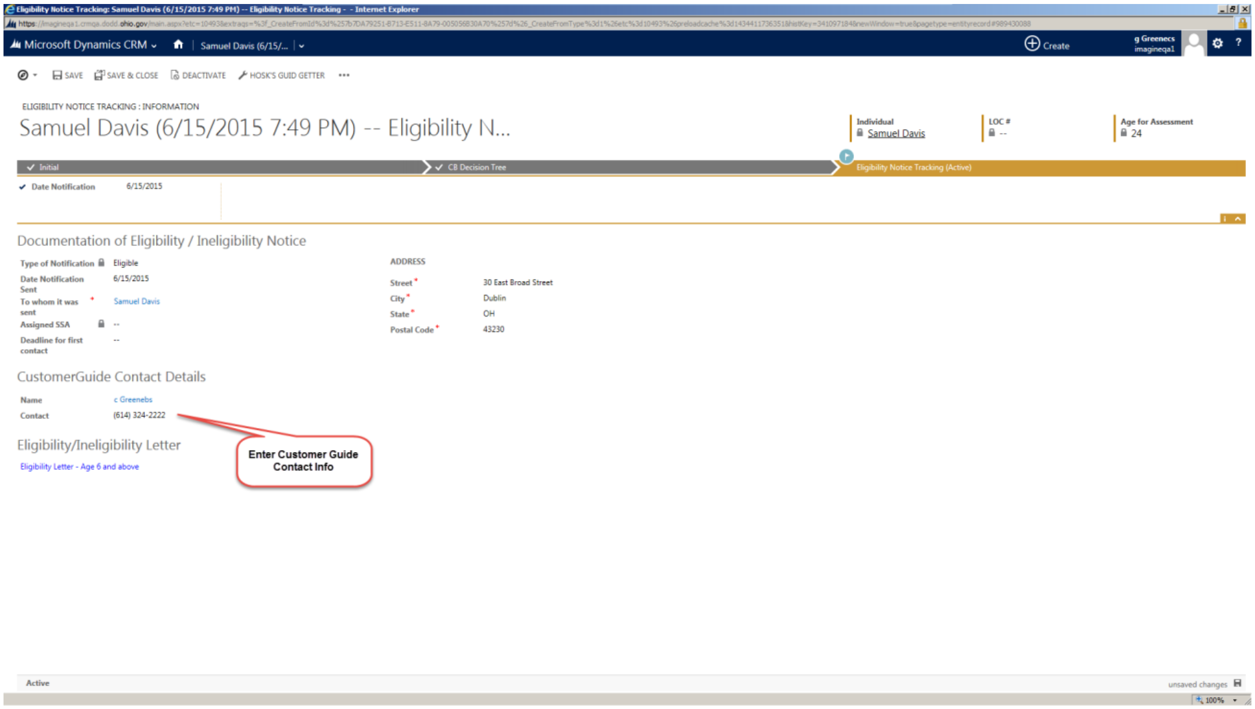


2. If the person to whom the mail has to be sent does not have mailing address, system will prompt you to enter mailing address. Press OK to confirm.
3. **Enter the mailing address** for the individual. Address will be prefilled if individual have a mailing address on his profile

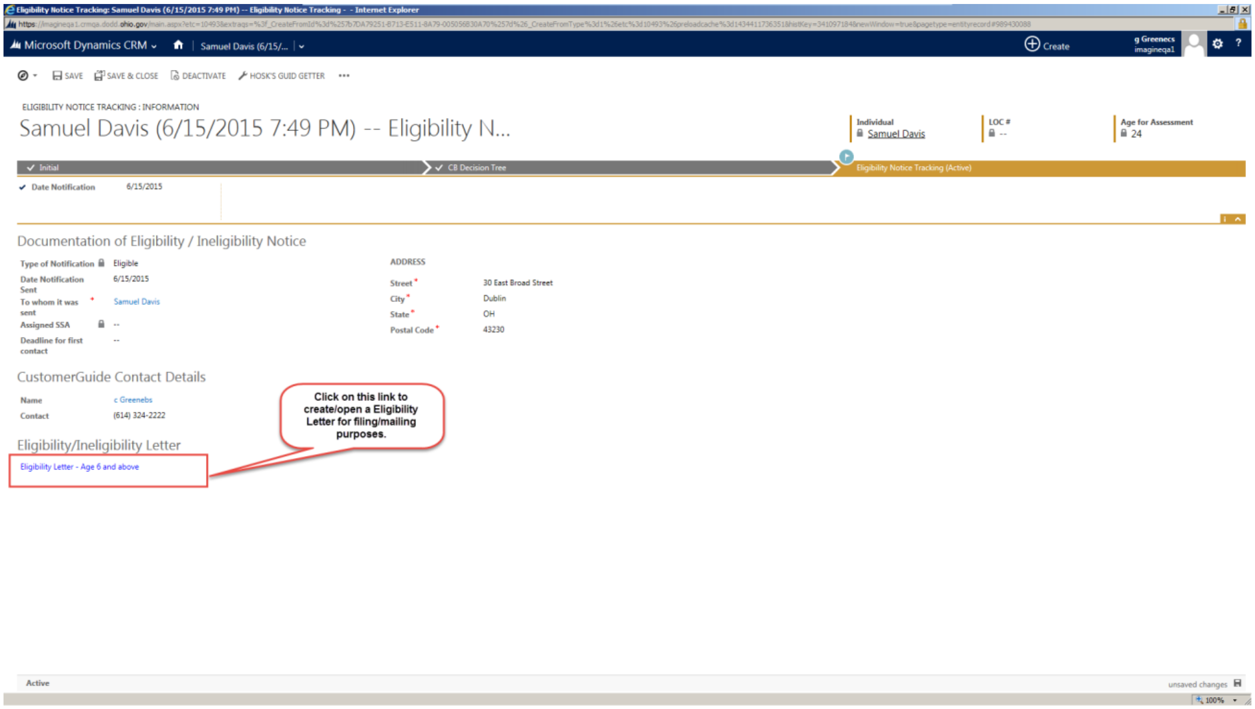
6. **Select a Customer Guide or Eligibility Specialist** by clicking on the magnifying glass - this will show you list of all customer guide and eligibility specialist in your county.



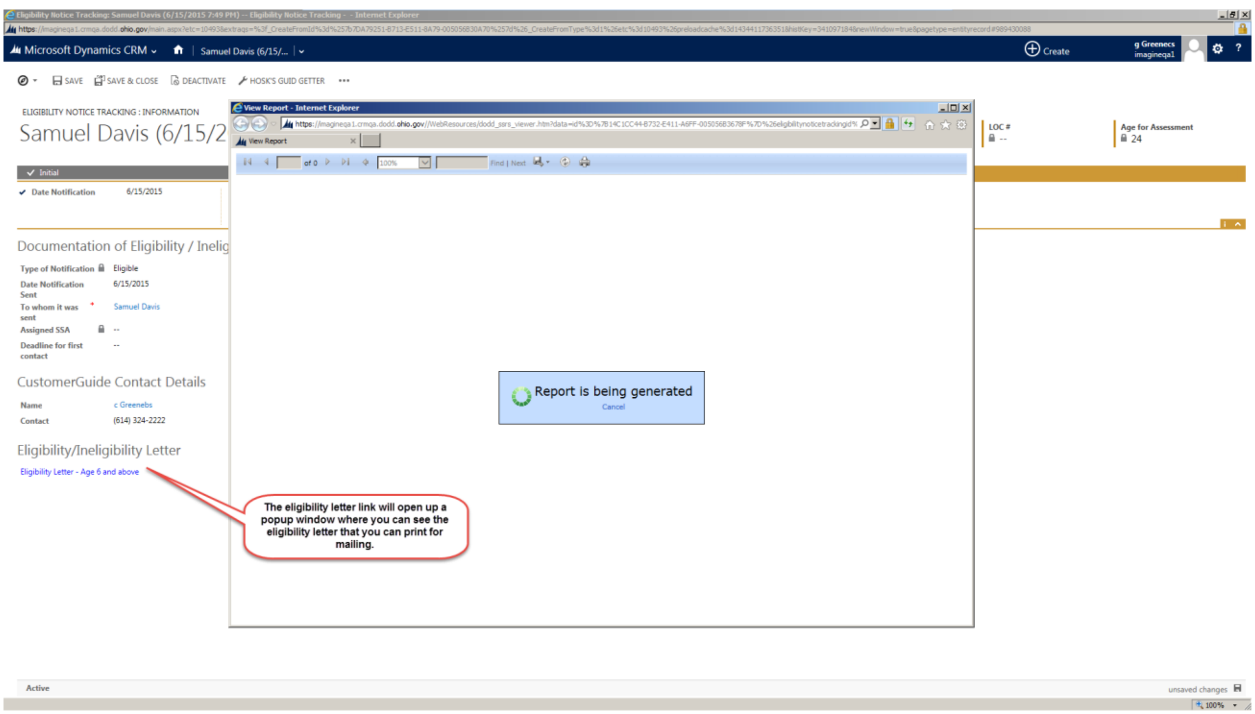
15. Enter Customer Guide’s contact information

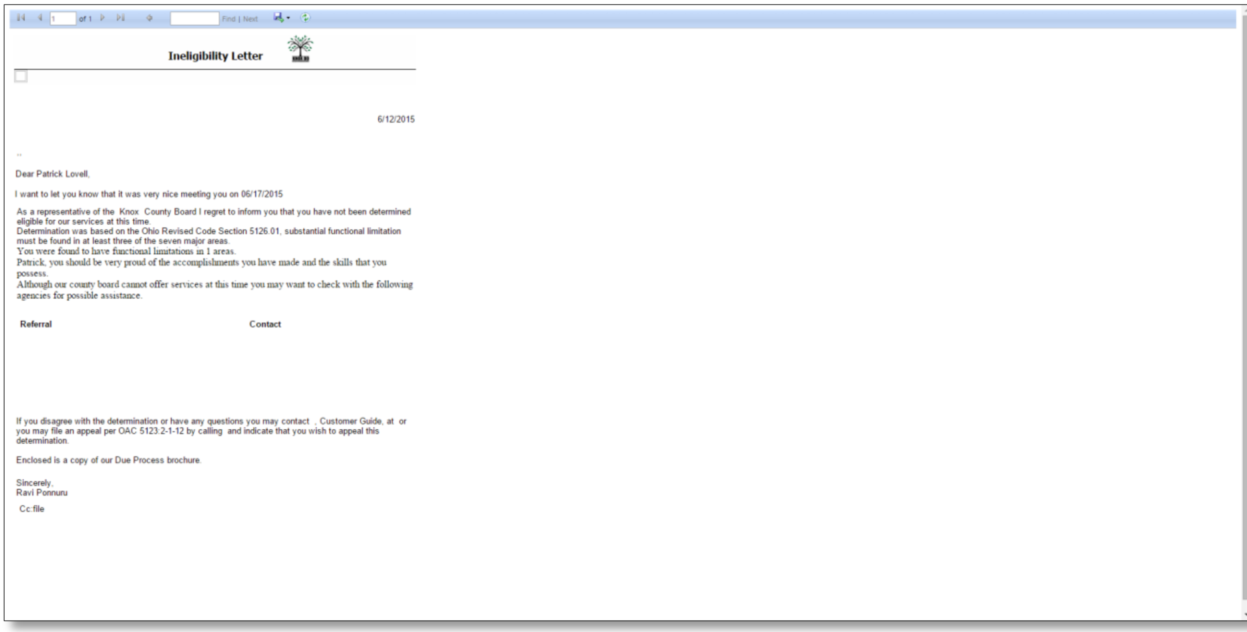


16. Open the **Eligible/Ineligible Notice** by clicking on the link under the Eligibility/Ineligibility Letter Tab



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





Ineligibility Letter

6/12/2015

Dear Patrick Lovell,

I want to let you know that it was very nice meeting you on 06/17/2015

As a representative of the Knox County Board I regret to inform you that you have not been determined eligible for our services at this time.
Determination was based on the Ohio Revised Code Section 5126.01, substantial functional limitation must be found in at least three of the seven major areas.
You were found to have functional limitations in 1 areas.
Patrick, you should be very proud of the accomplishments you have made and the skills that you possess.
Although our county board cannot offer services at this time you may want to check with the following agencies for possible assistance.

Referral	Contact

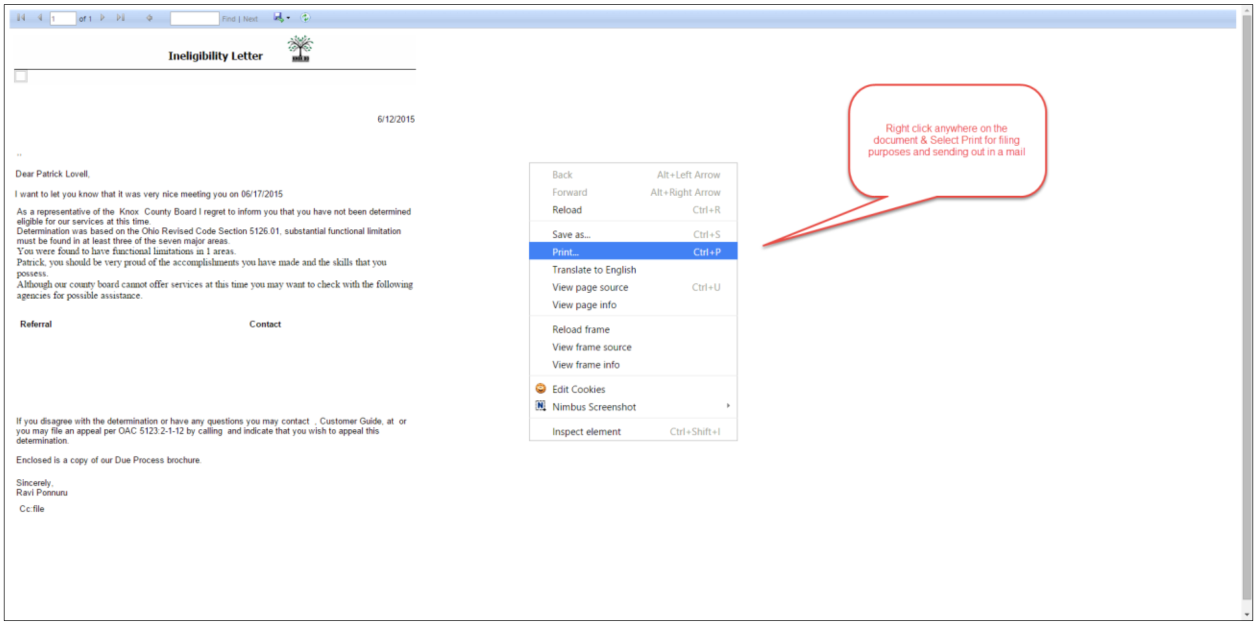
If you disagree with the determination or have any questions you may contact , Customer Guide, at or you may file an appeal per OAC 5123:2-1-12 by calling and indicate that you wish to appeal this determination.

Enclosed is a copy of our Due Process brochure.

Sincerely,
Ravi Ponnuru

Cc:file

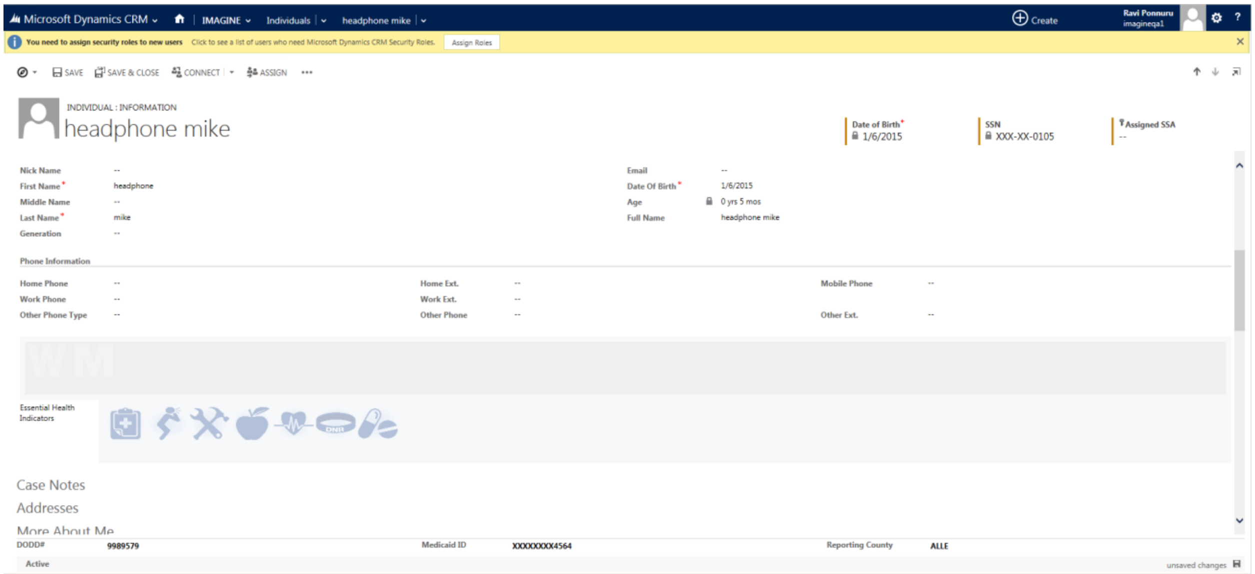
18. Right click on your mouse and select print to **Print the Notice**



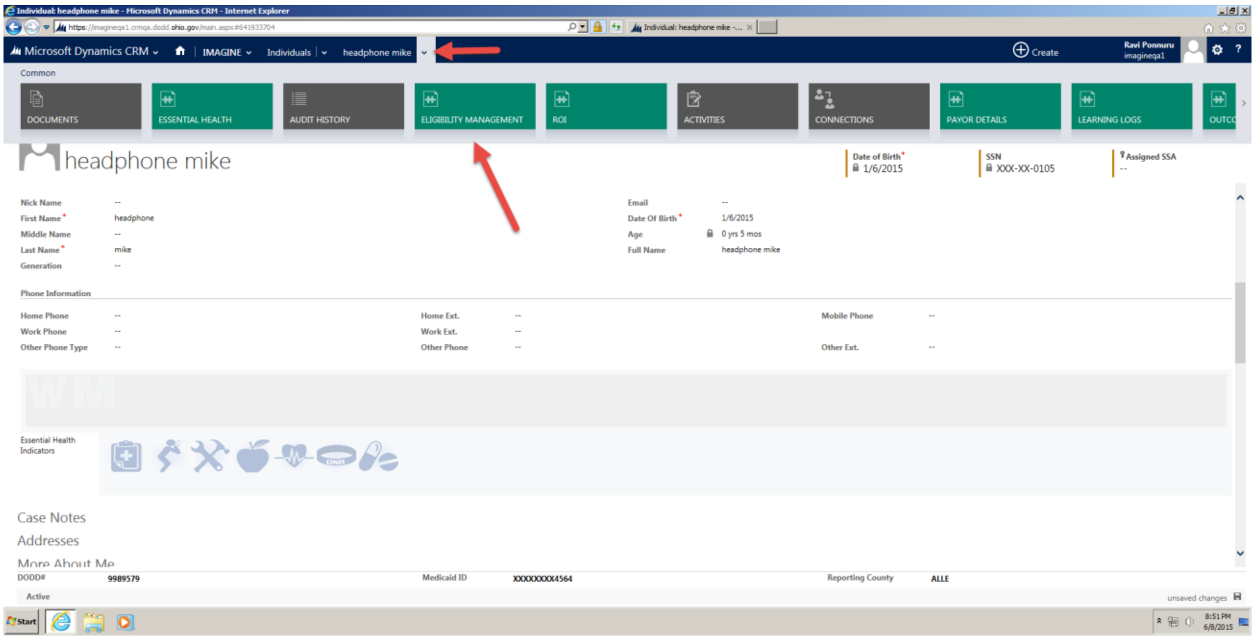
You just completed the County Board eligibility for an individual

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**

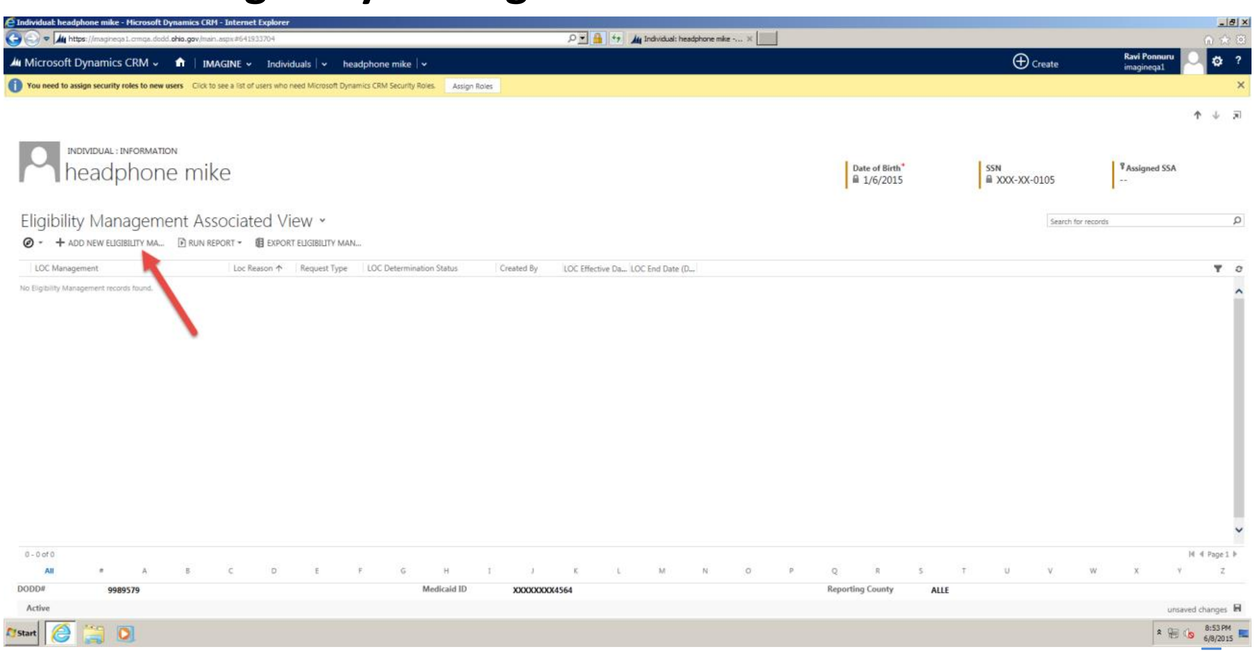


6. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name

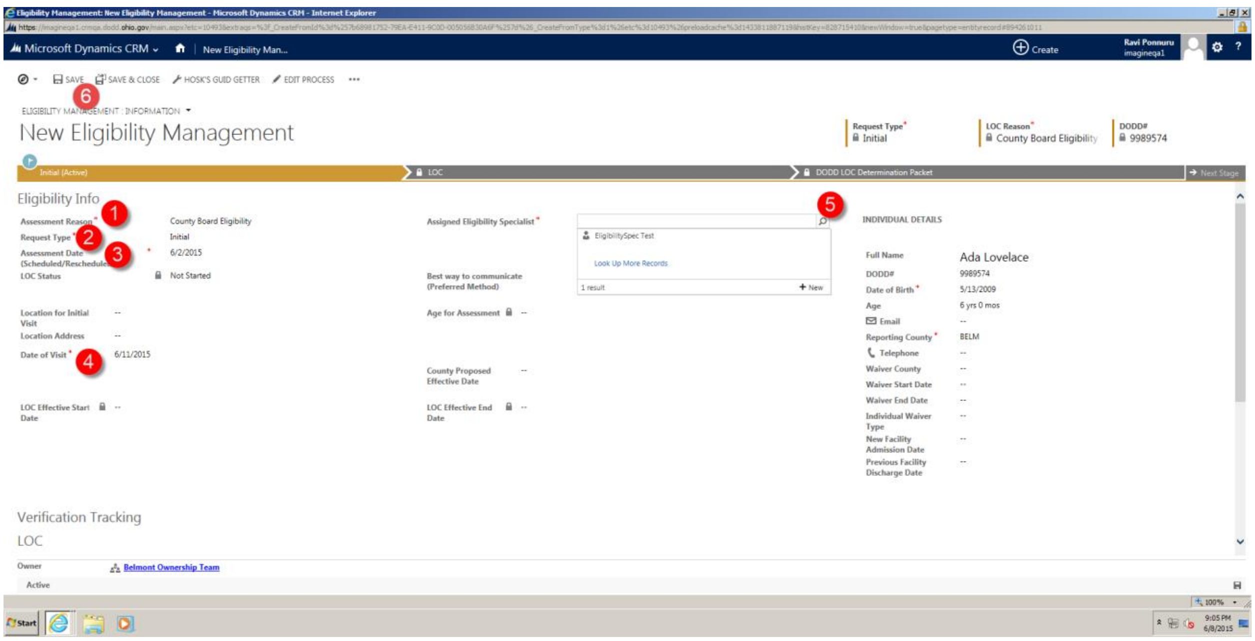


7. User will land on **Eligibility Management View Page**—you can see all the eligibilities done for that individual

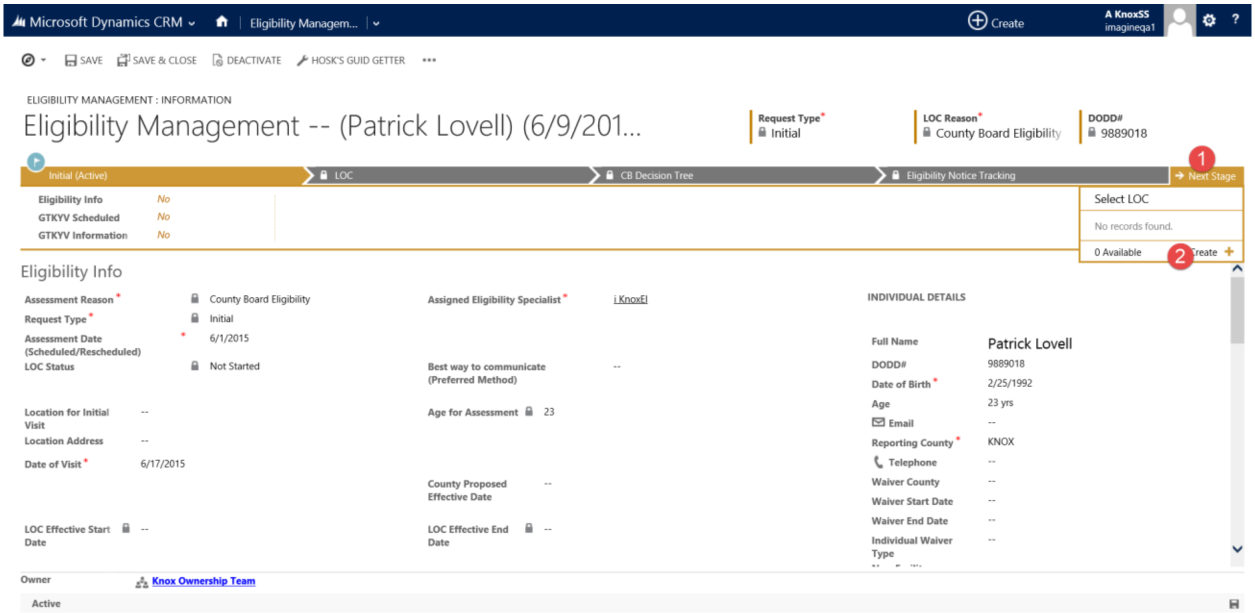
8. **Add New Eligibility Management**



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 todays or past date – it's when you are got this information from individual
    4. **Date of Visit =** can be todays 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

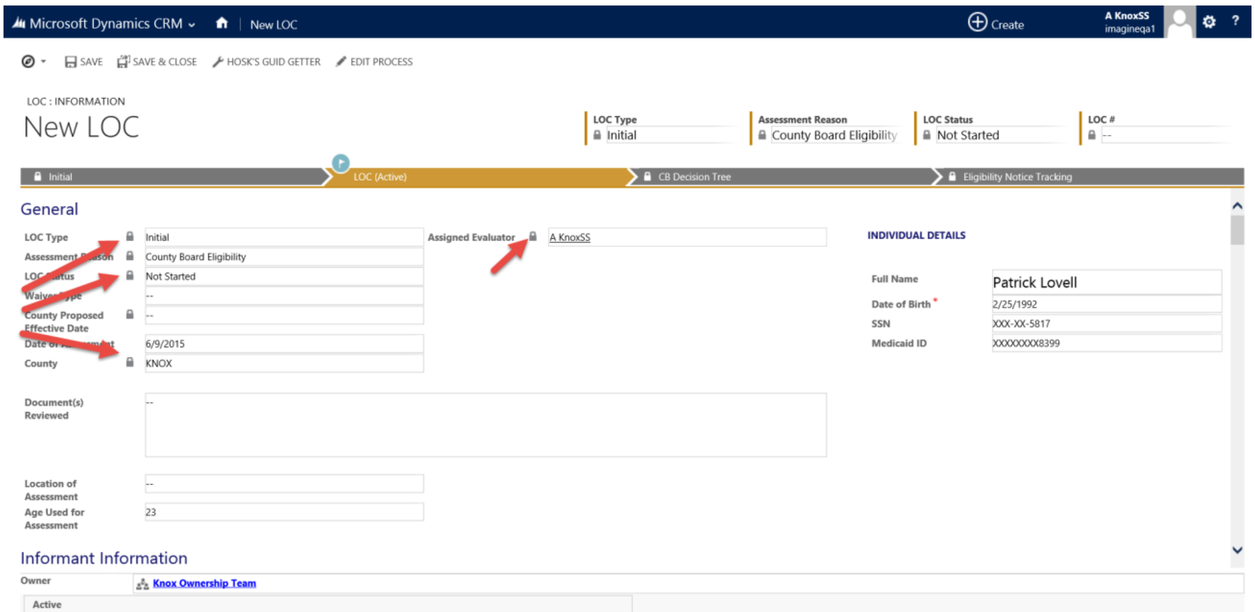


10. Move to **LOC stage** by clicking on
    1. The **“Next Stage”** &
    2. **Create+** on Next Stage



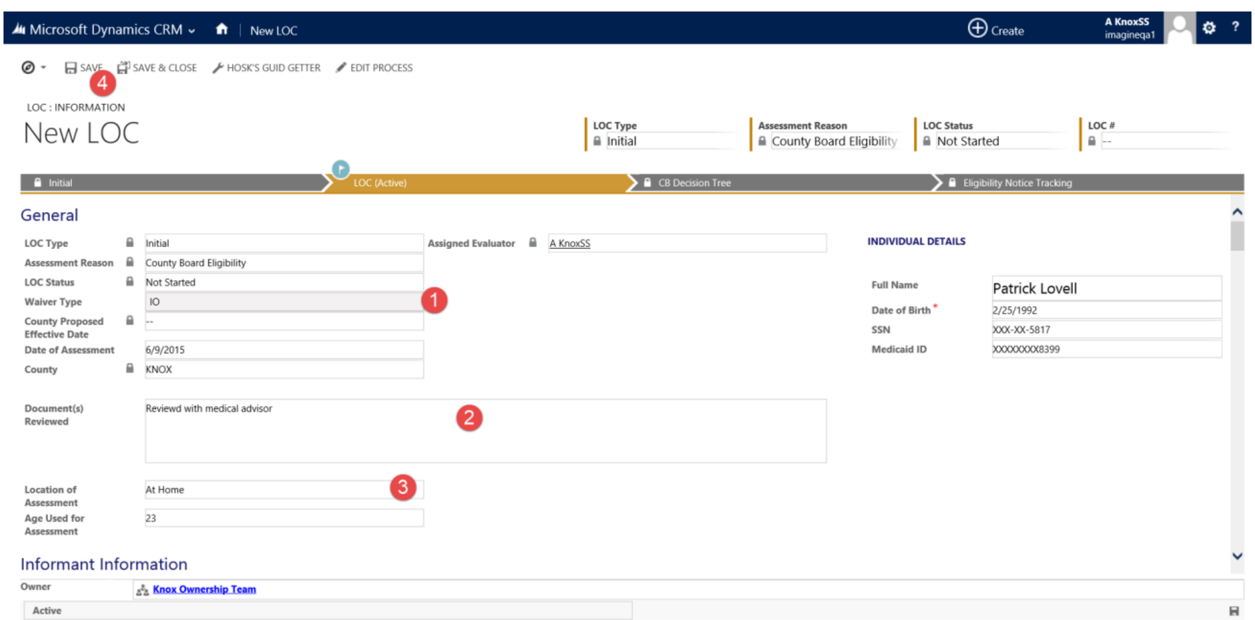
11. User will be now be on the LOC tool

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

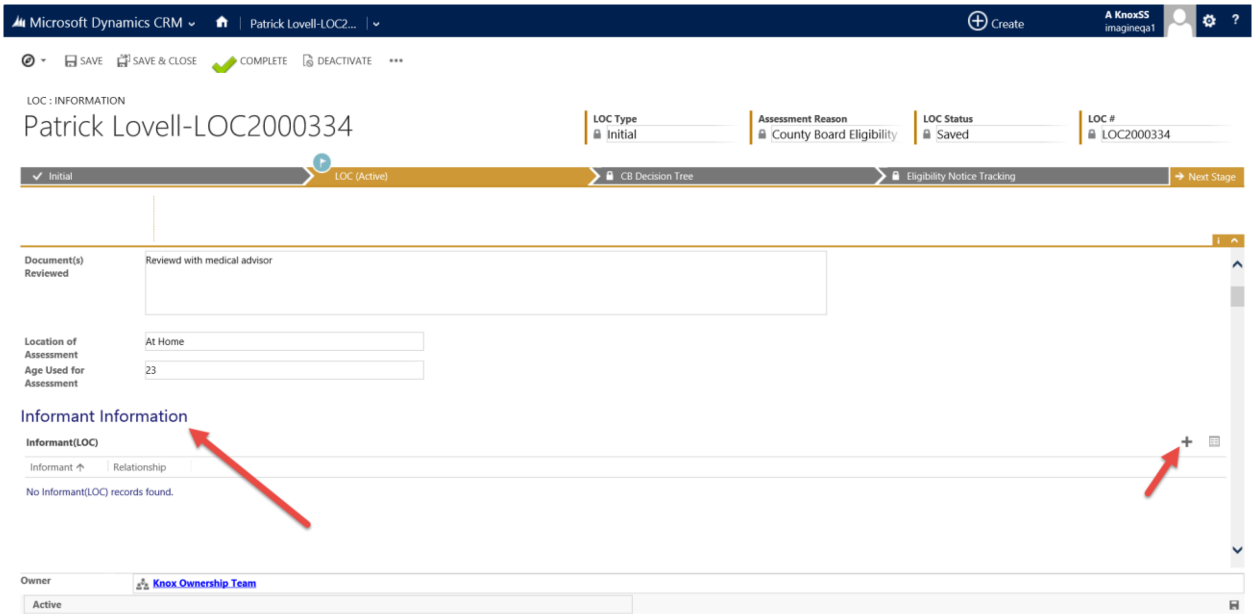


13. All fields on LOC are **REQUIRED** to complete LOC

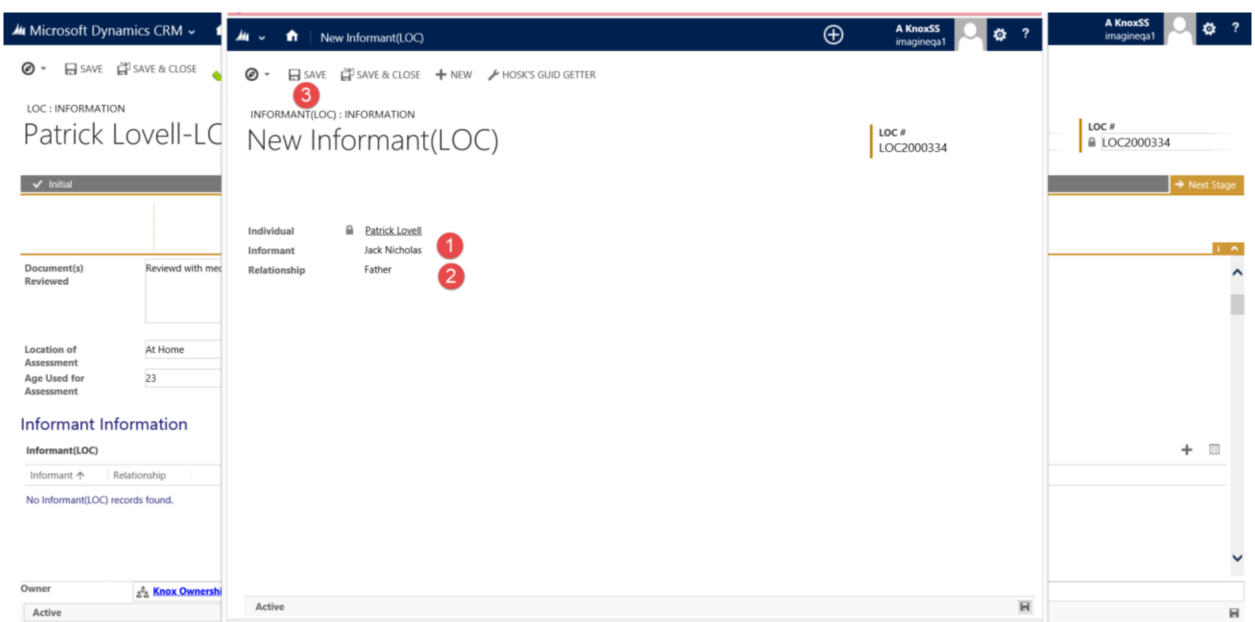
14. Enter the General information on LOC and **SAVE**



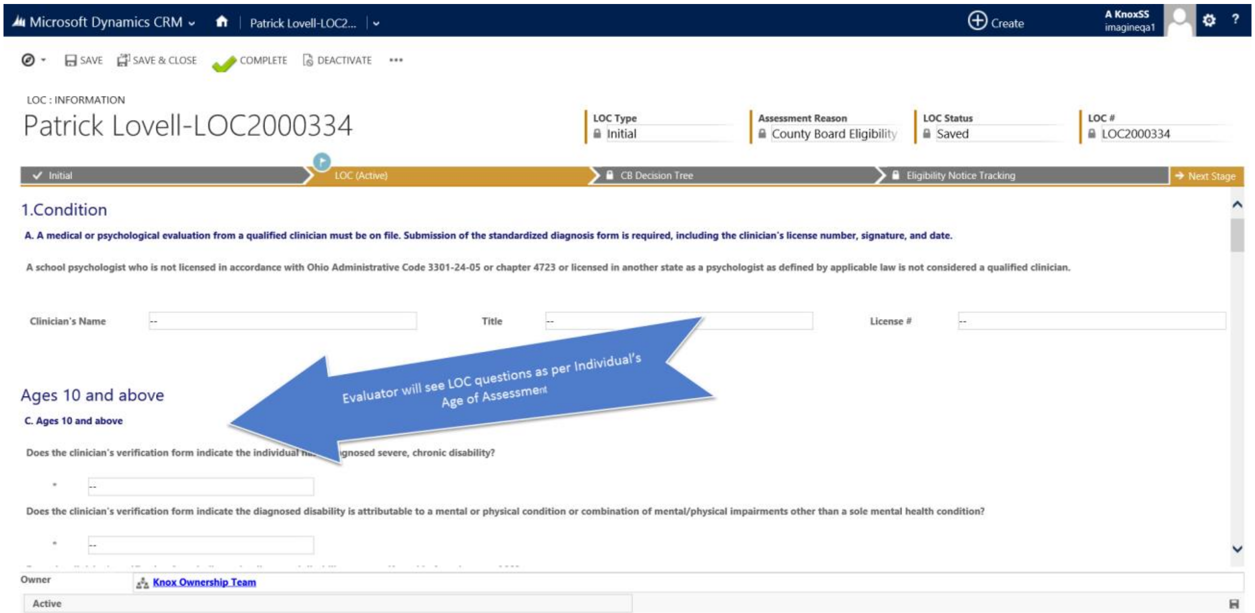
15. **Add informant** by clicking on the + sign on your right hand side→ enter informant's name and relationship with individual in the pop up that will appear



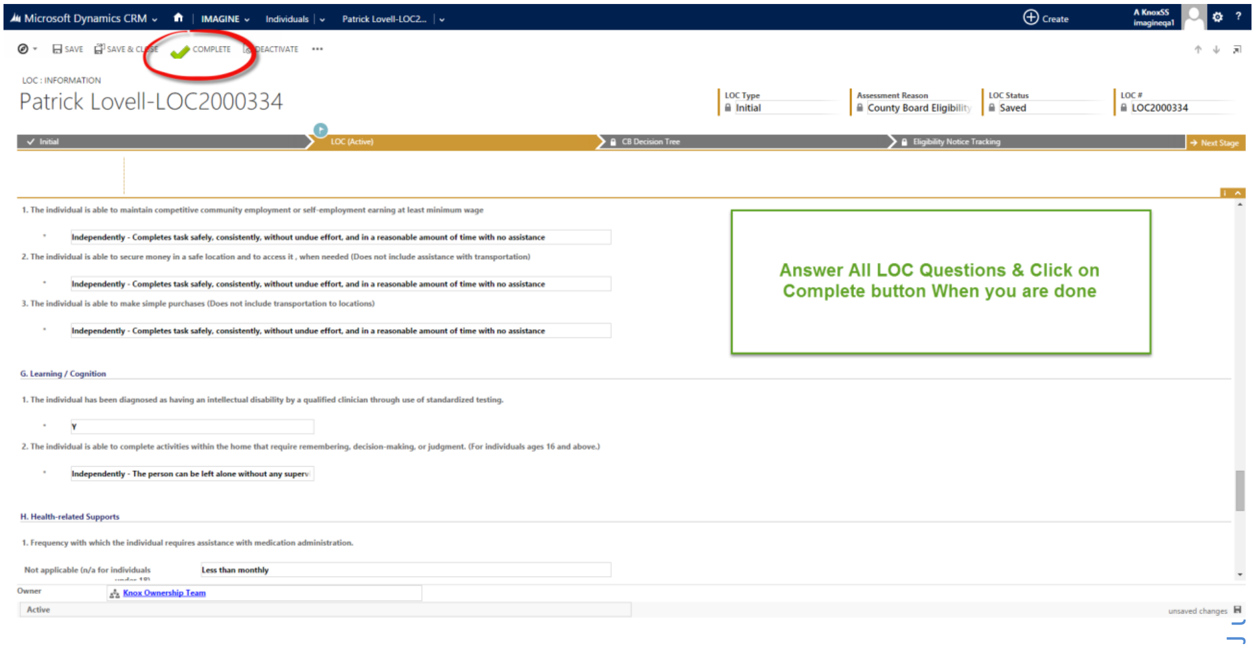
1. Add Informant Name
2. Add Informant relationship with individual.
3. And click on **SAVE** button.



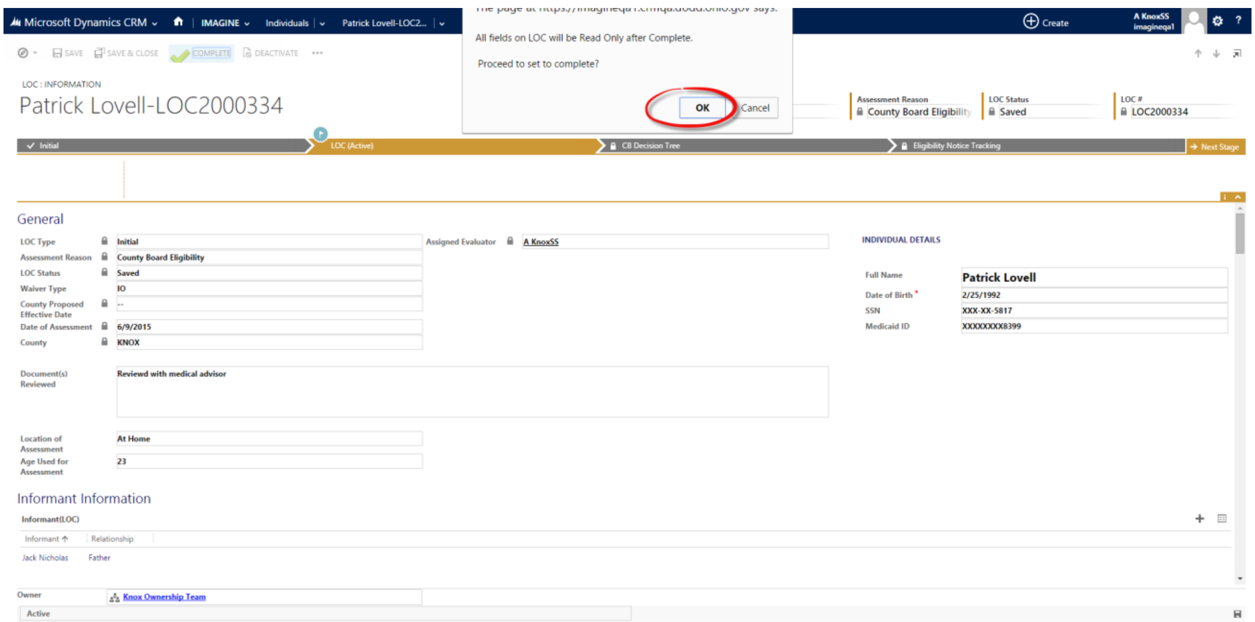
16. Evaluator will see **LOC questions as per Individual's Age** (always 10 and above for county board eligibility)



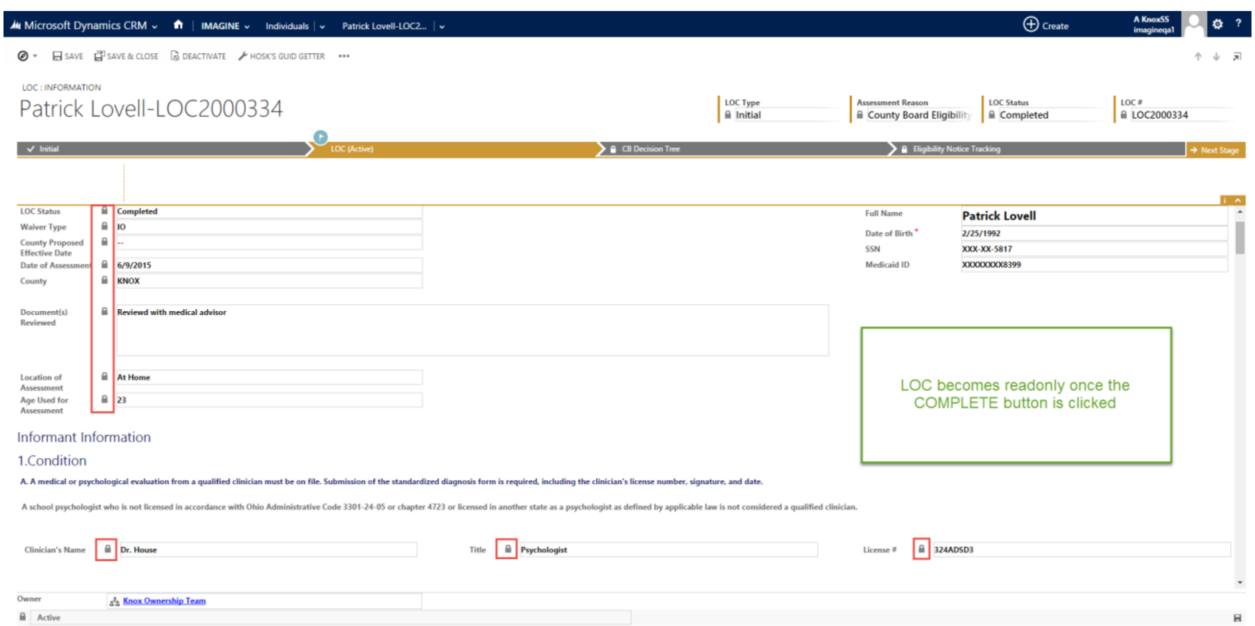
17. **Answer all the questions on LOC**
18. Save LOC at any time.
19. **Complete LOC** by clicking on the "**Complete**" button; once all information on LOC is entered



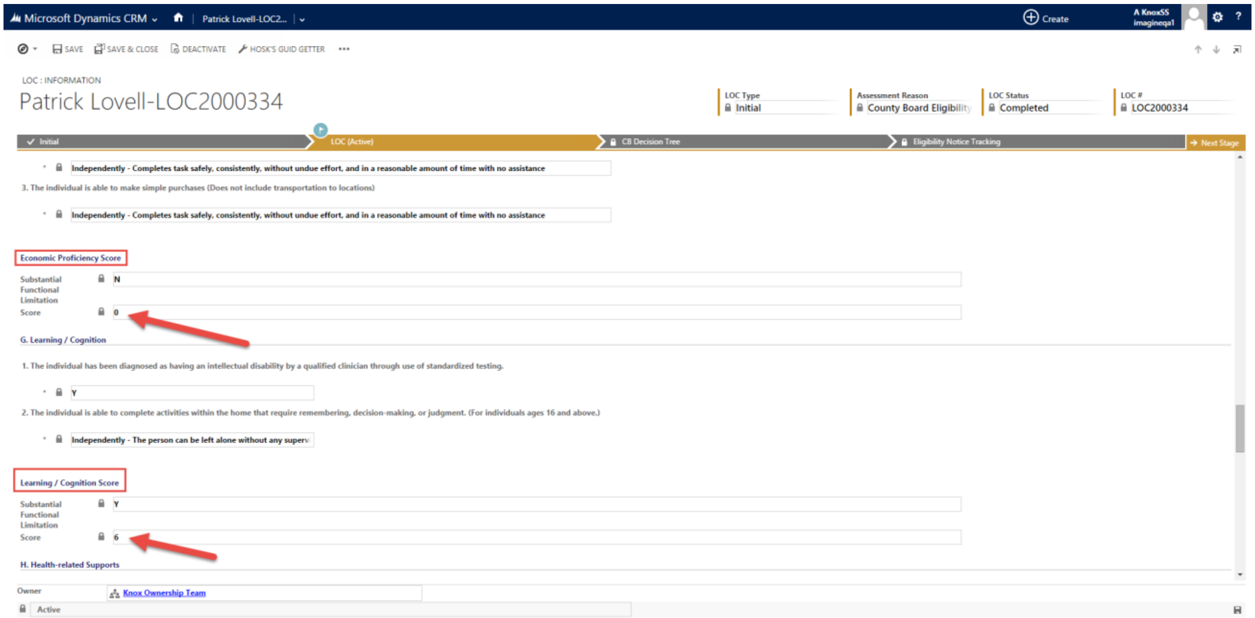
20. Click on OK when it confirms to complete LOC



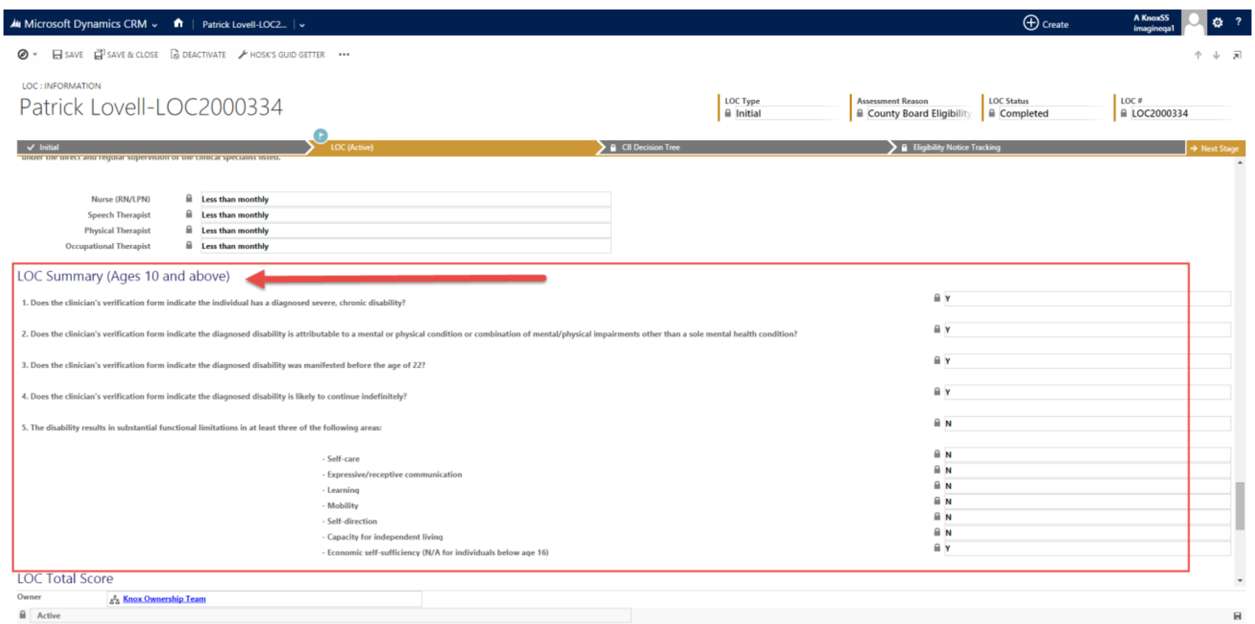
21. Once LOC is Completed→ LOC becomes read only; user will see the lock symbol next to all the fields and cannot edit anything now.



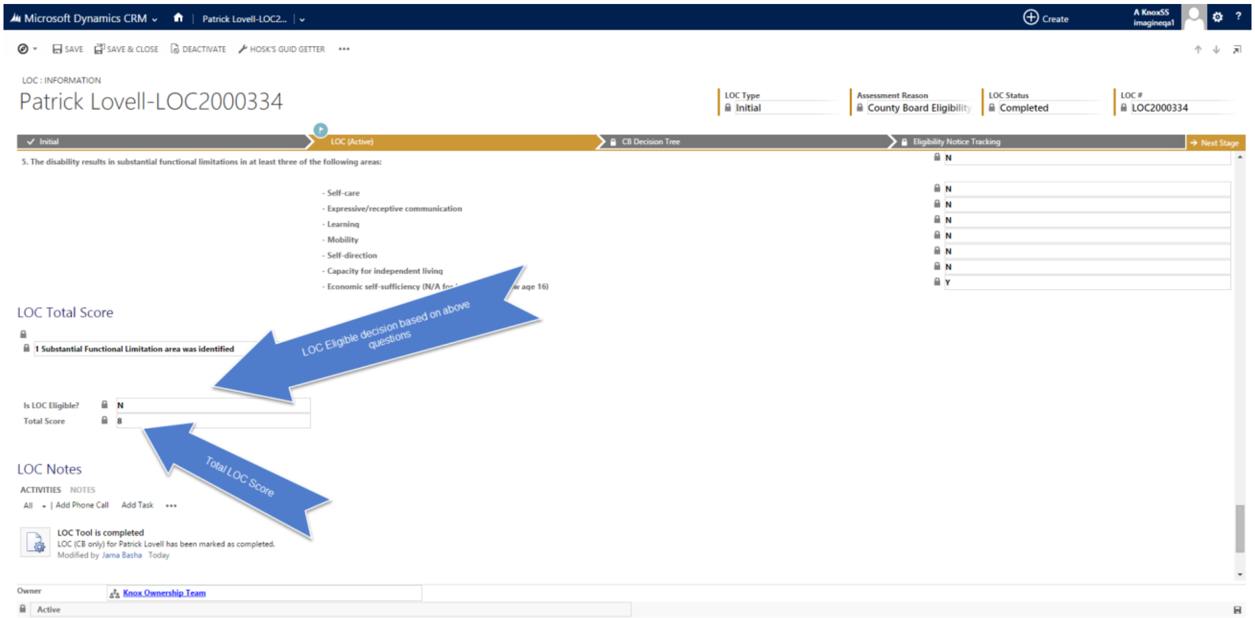
22. View **Score per Section** (major life area) after LOC is Completed



23. View **LOC Summary** after LOC is Completed



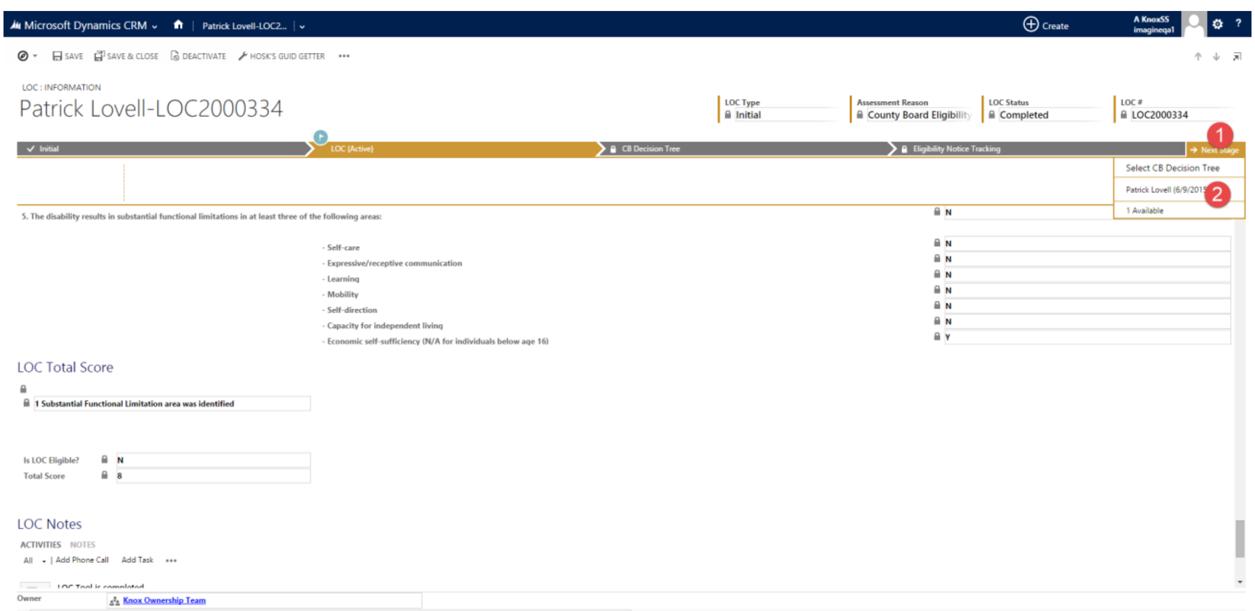
24. View **LOC Eligible = YES/NO** after LOC is Completed



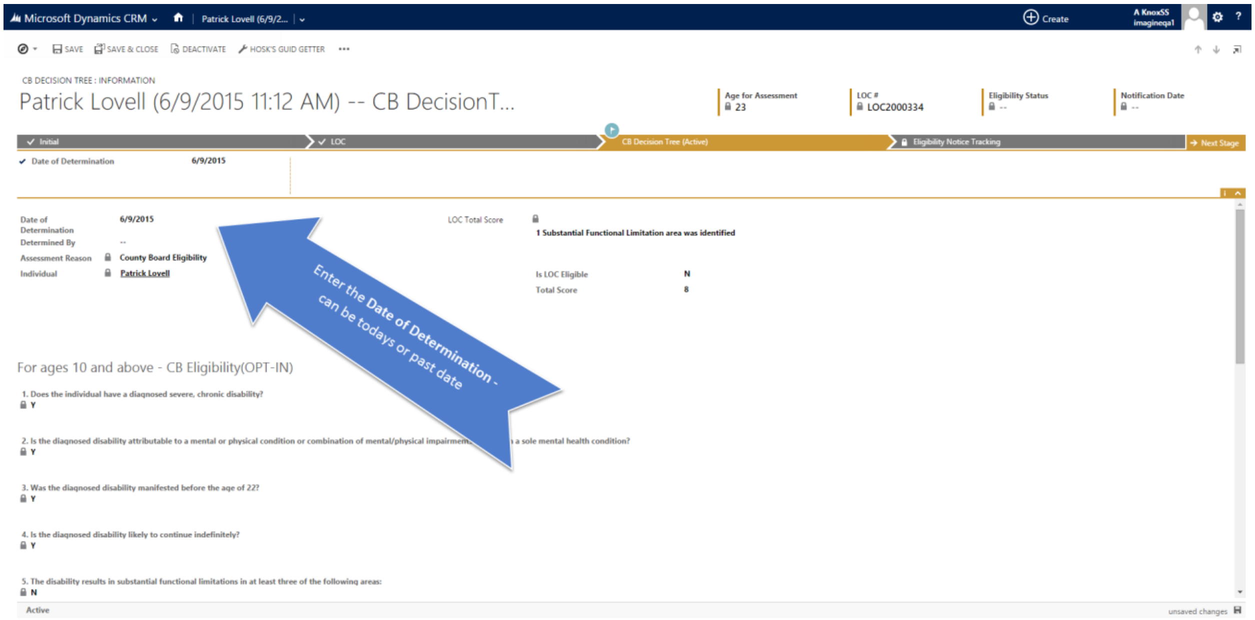
25. Move to **Decision Tree stage →** by clicking on the

   1. "Next Stage" &

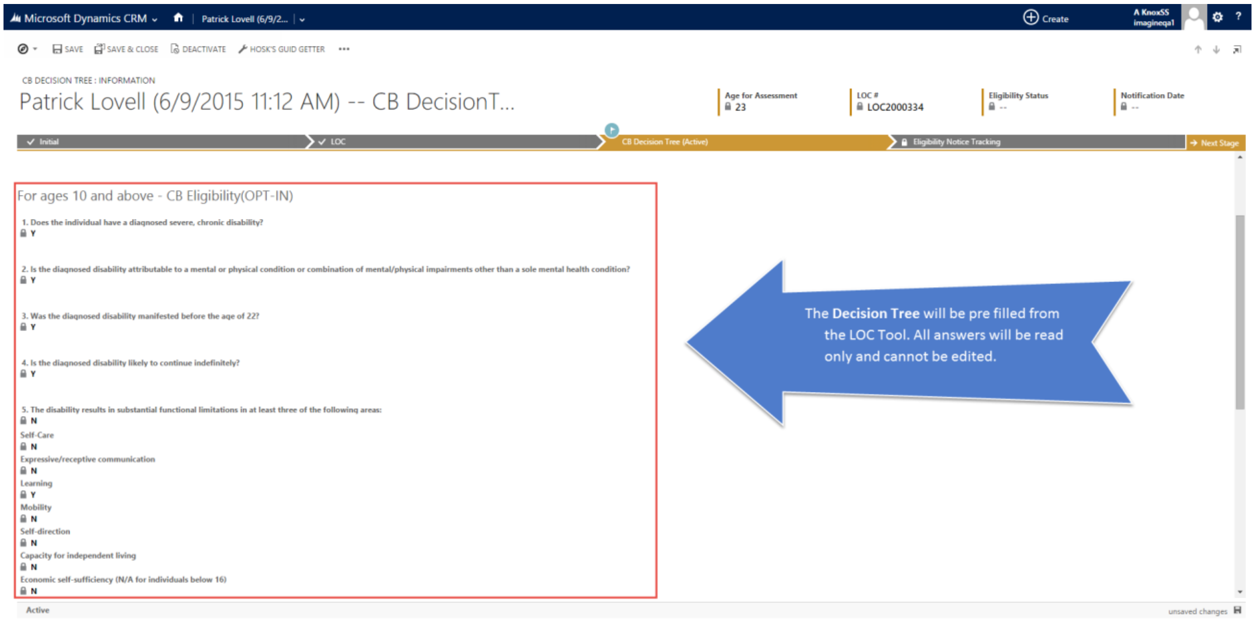
   2. Select the Determination Packet that is created



26. Enter the **Date of Determination** – can be todays or past date

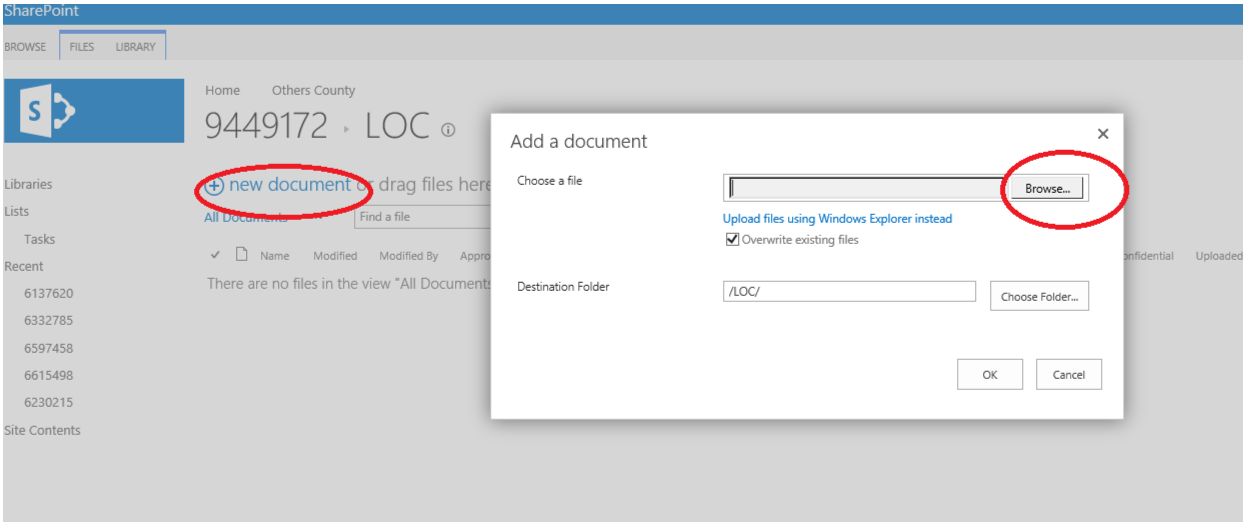


27. The **Decision Tree** will be pre filled from the LOC Tool. All answers will be read only and cannot be edited

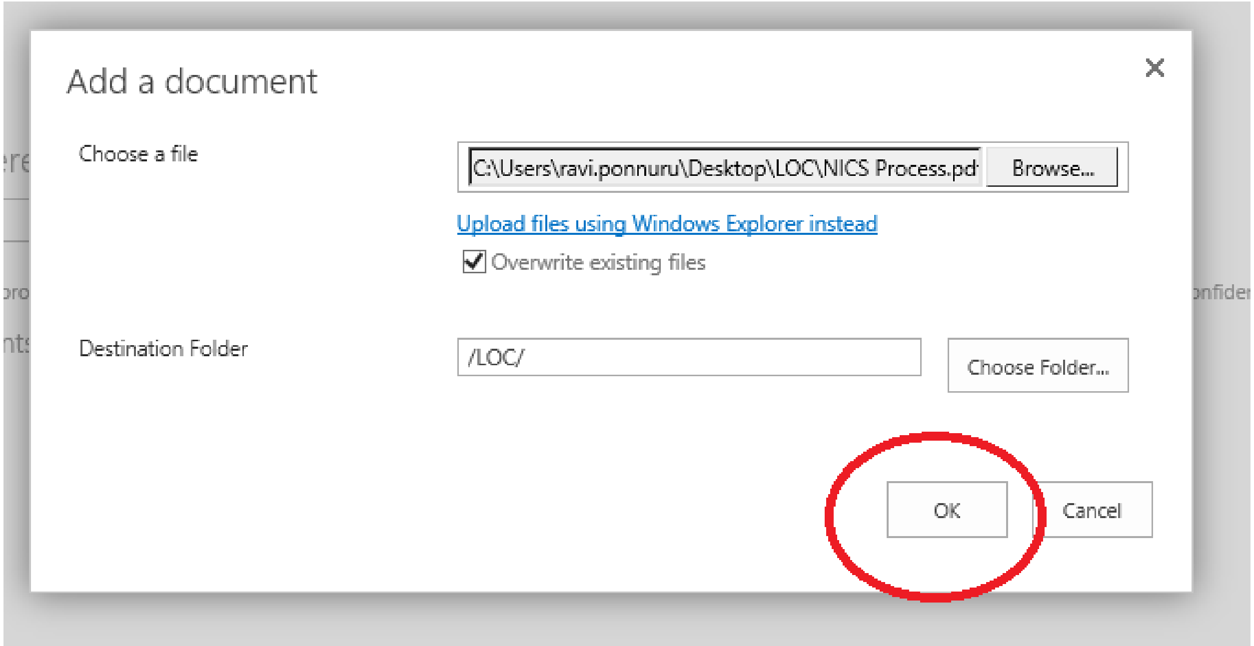


28. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document** to SharePoint

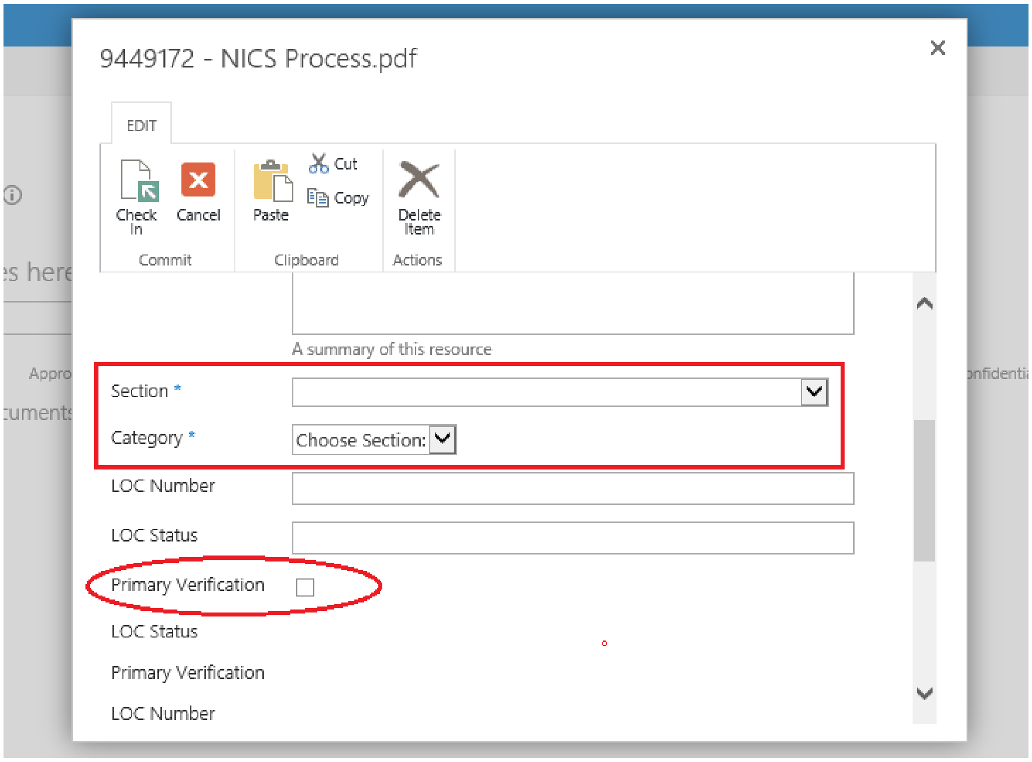
1. Click on **+new document**
2. Click on **chose file**



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

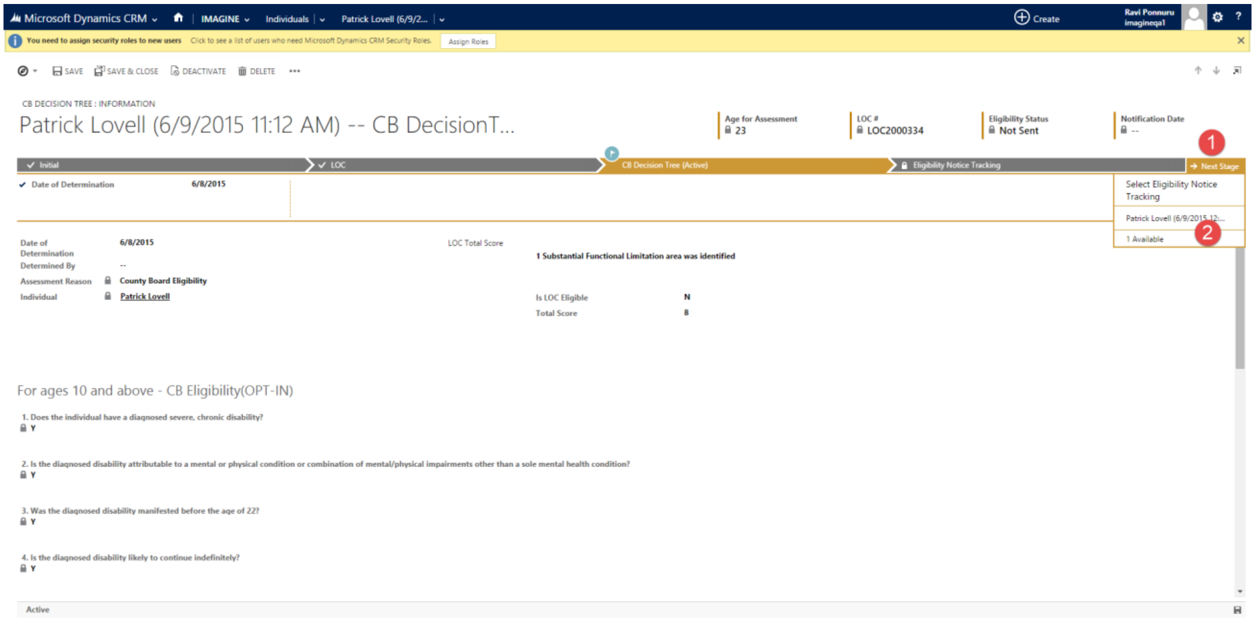


5. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
6. **Add Section →** Select "**LOC**" from the option set
7. **Add Category→** Select the reason for what you are uploading the document → in this case it should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

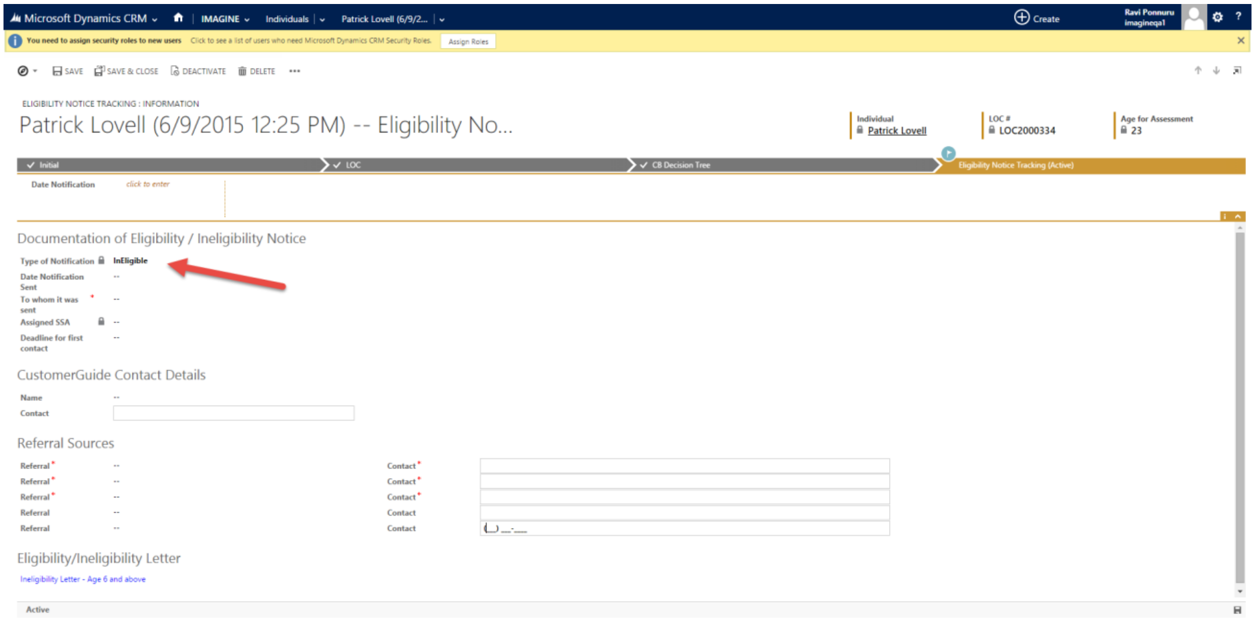

9449172 - NICS Process.pdf
EDIT
Check In
Cancel
Paste
Cut
Copy
Delete Item
Commit
Clipboard
Actions
A summary of this resource
Section *
Category *
Choose Section:
LOC Number
LOC Status
Primary Verification
LOC Status
Primary Verification
LOC Number

1.

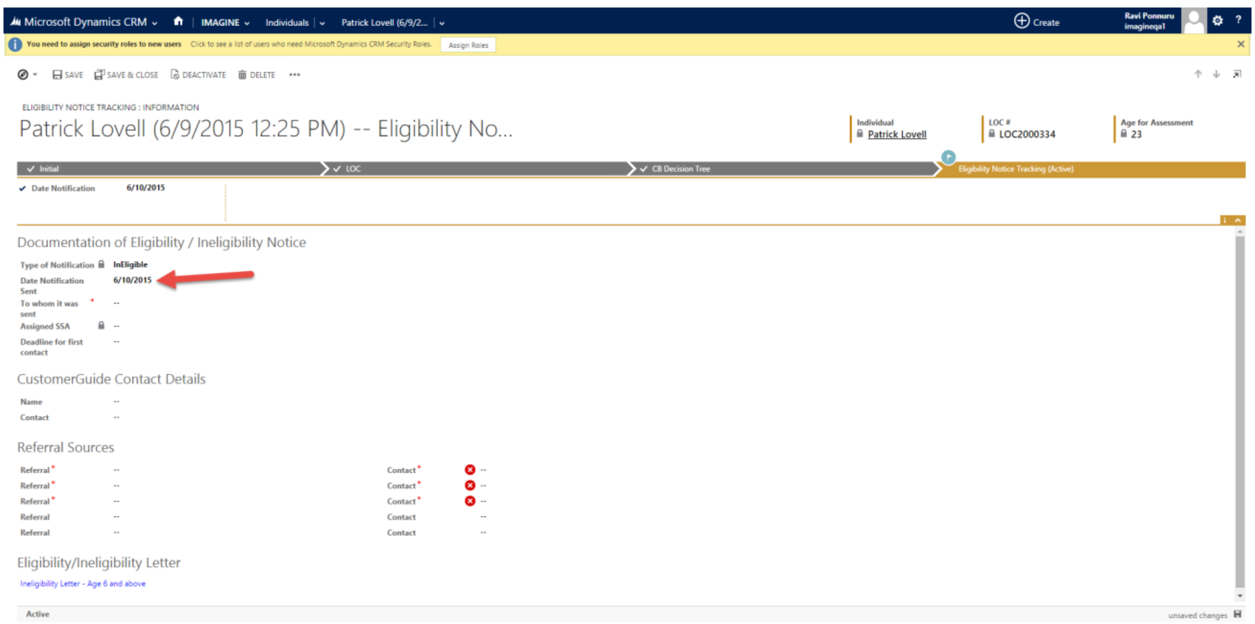
29. Move to **Eligibility Notice Tracking stage →** by clicking
    1. **“Next Stage”** &
    2. **Select the packet in the list**



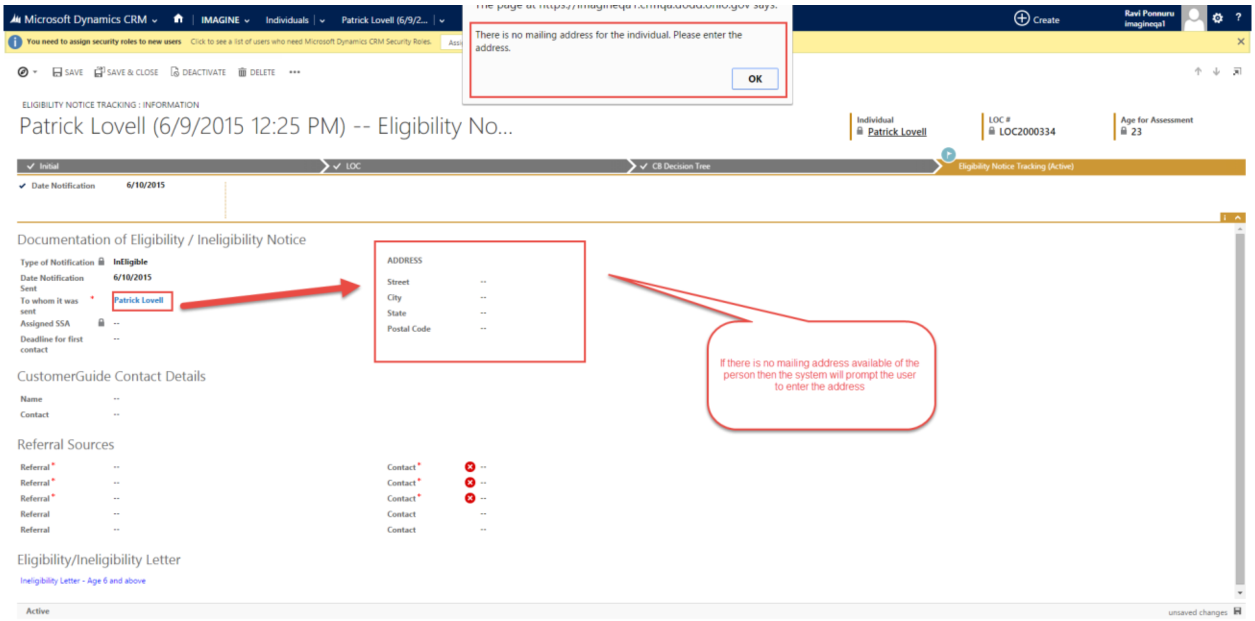
30. **Type of Notification** will auto populate per the result of the tool (**Eligible**/Yes on LOC Tool or **Ineligible**/No on the LOC Tool)



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

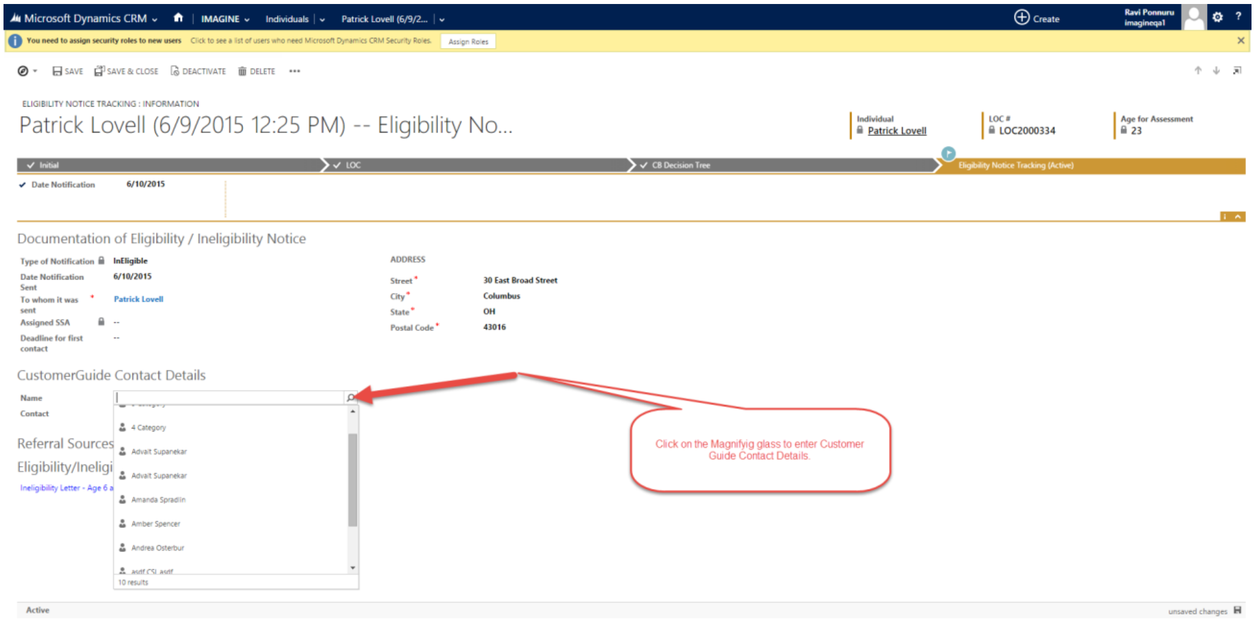


32. Fill in **To Whom it was sent** by selecting the Individual's name or individual's parent or guardian's name from the option set.

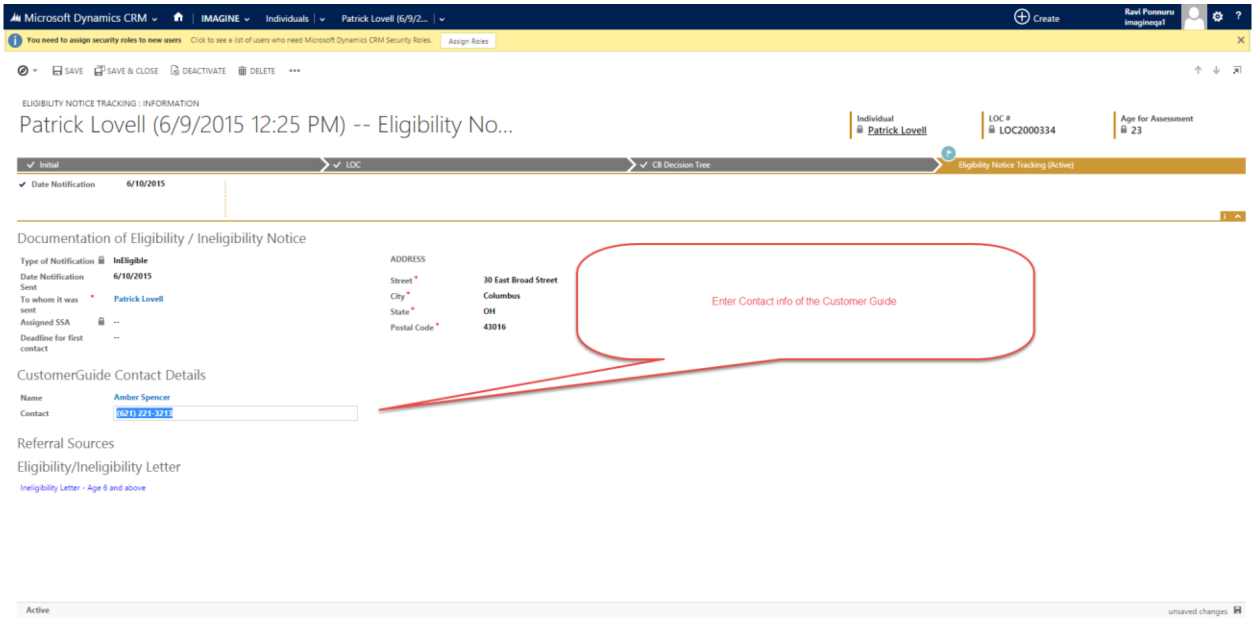


33. **Enter the mailing address** for the individual. Address will be prefilled if individual have a mailing address on his profile. If not, it will prompt you to add mailing address.

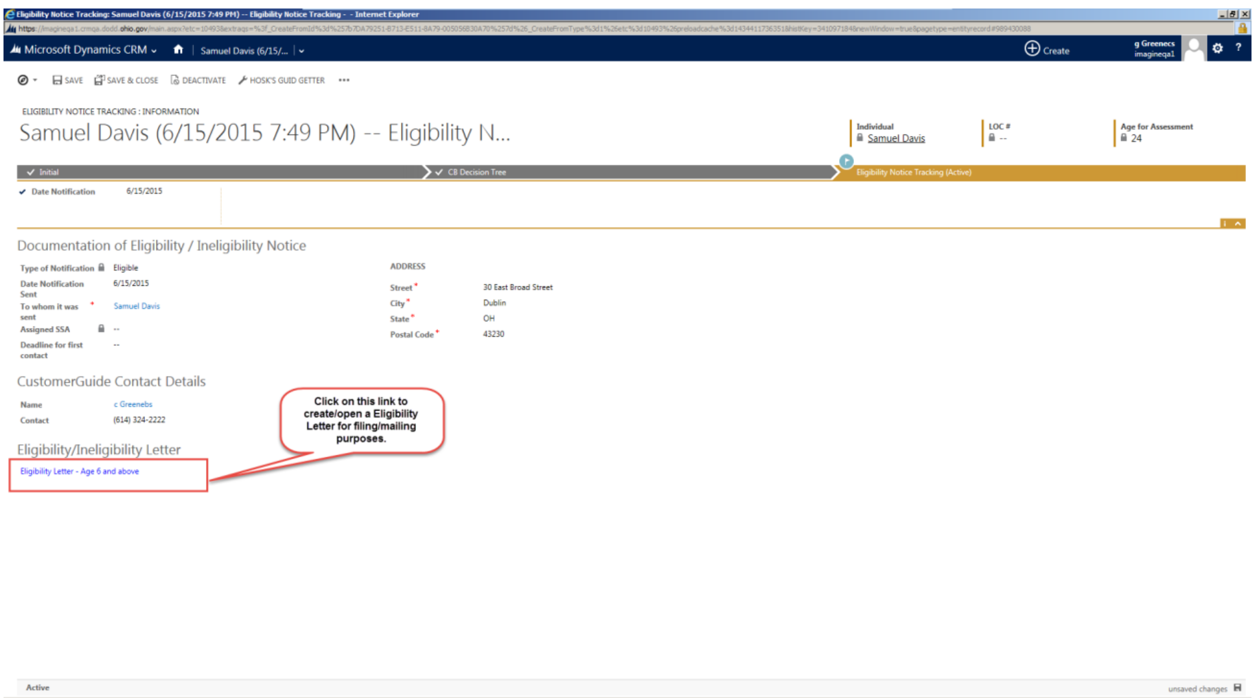
34. **Select a Customer Guide** by clicking on the magnifying glass- this will show you list of all customer guide and eligibility specialist in your county.


Microsoft Dynamics CRM
IMAGINE
Individuals
Patrick Lovell (6/9/2...
Create
Ravi Ponnuru
imagineqa1
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
SAVE
SAVE & CLOSE
DEACTIVATE
DELETE
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
CB Decision Tree
Eligibility Notice Tracking (Active)
Date Notification
6/10/2015
Documentation of Eligibility / Ineligibility Notice
Type of Notification
InEligible
Date Notification Sent
6/10/2015
To whom it was sent
Patrick Lovell
Assigned SSA
Deadline for first contact
ADDRESS
Street
30 East Broad Street
City
Columbus
State
OH
Postal Code
43016
CustomerGuide Contact Details
Name
Contact
4 Category
Advait Supanekar
Advait Supanekar
Amanda Spradlin
Amber Spencer
Andrea Osterbur
10 results
Referral Sources
Click on the Magnifyig glass to enter Customer Guide Contact Details.
Active
unsaved changes

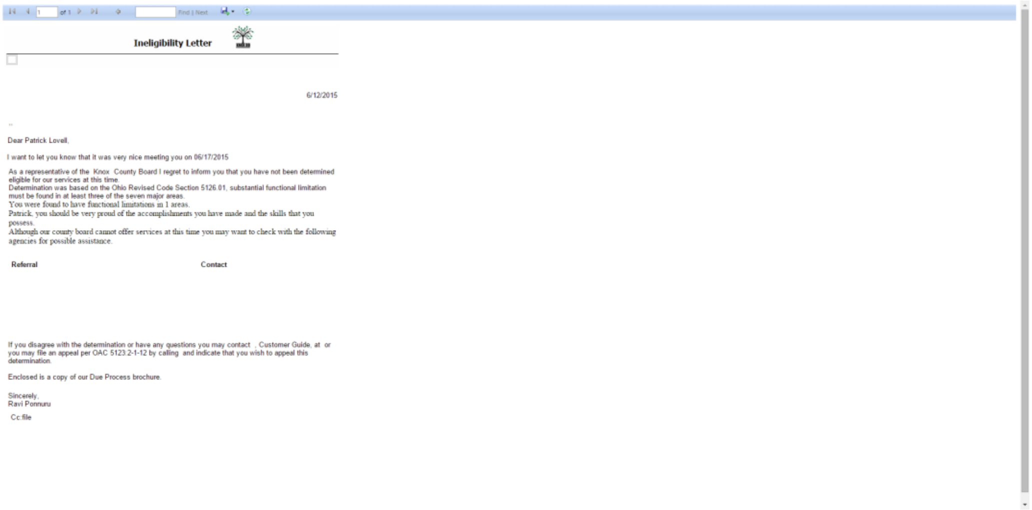
35. **Enter Customer Guide's contact information**



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

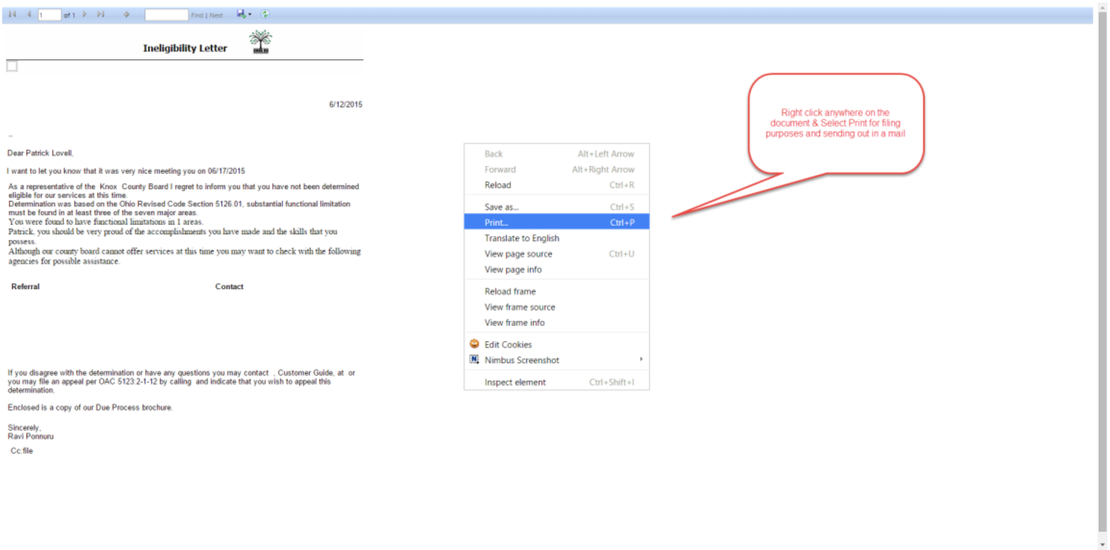


37. **Eligible/Ineligible Notice** will open in a new tab



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

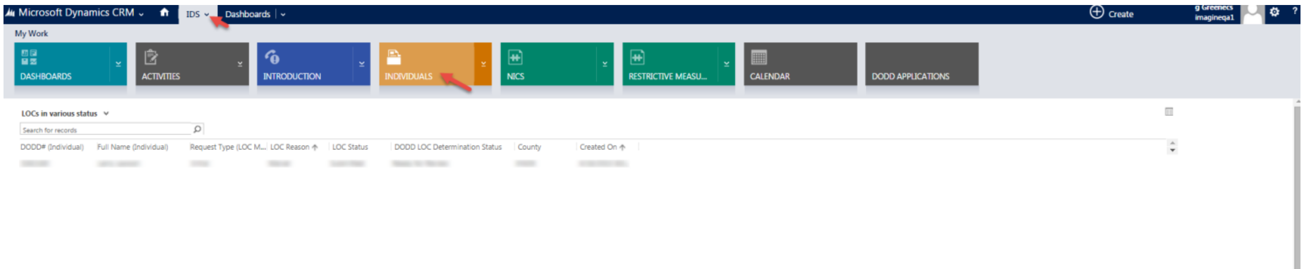
Note: Counties are not required to use this letter for notification.



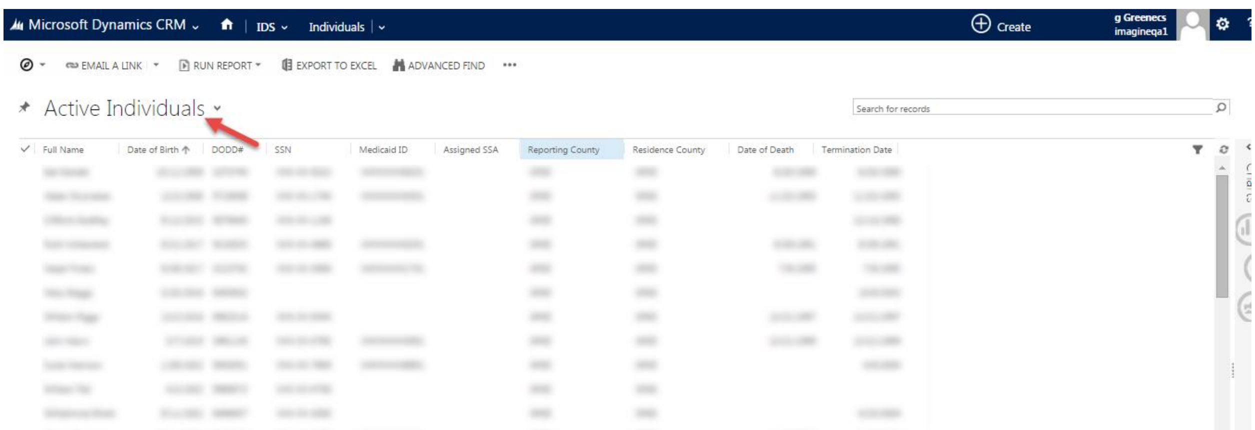
You just completed the County Board eligibility for 10 and above individual as an opt in county.

LOC for Waiver Eligibility

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

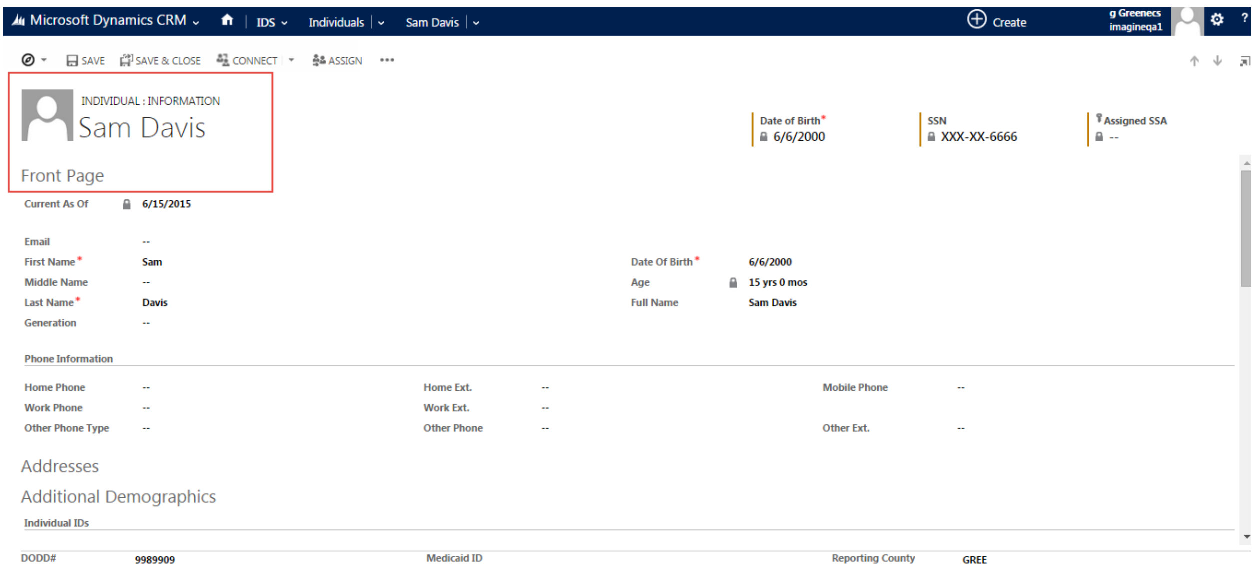


2. You will see list of **Active Individuals in your county**

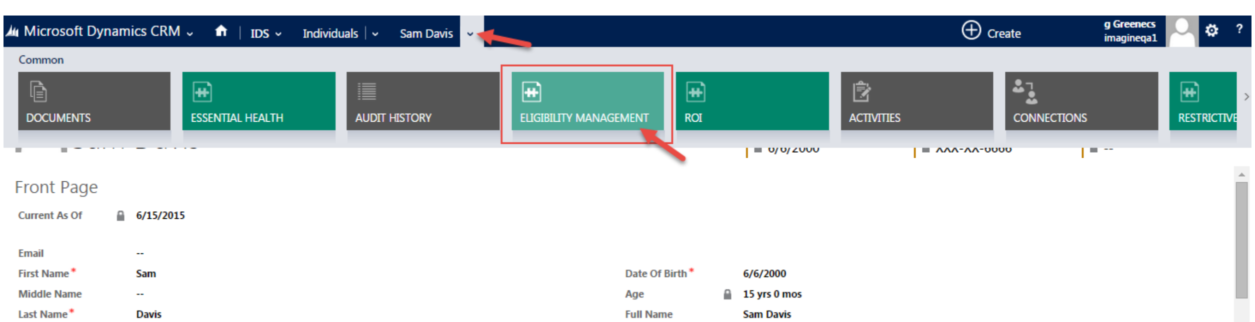


3. **Search for individual** by typing name in search box
4. Hit **Enter** or click on the magnifying glass next to search box
5. **Individual record will show up** if individual exist in your county

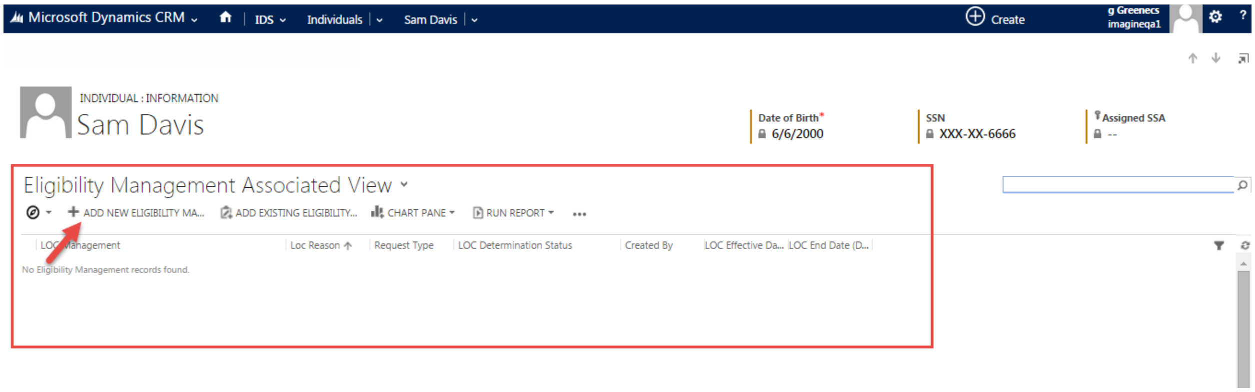
6. Double click on individual record to open individual's record
7. User will land on **Individual front page**



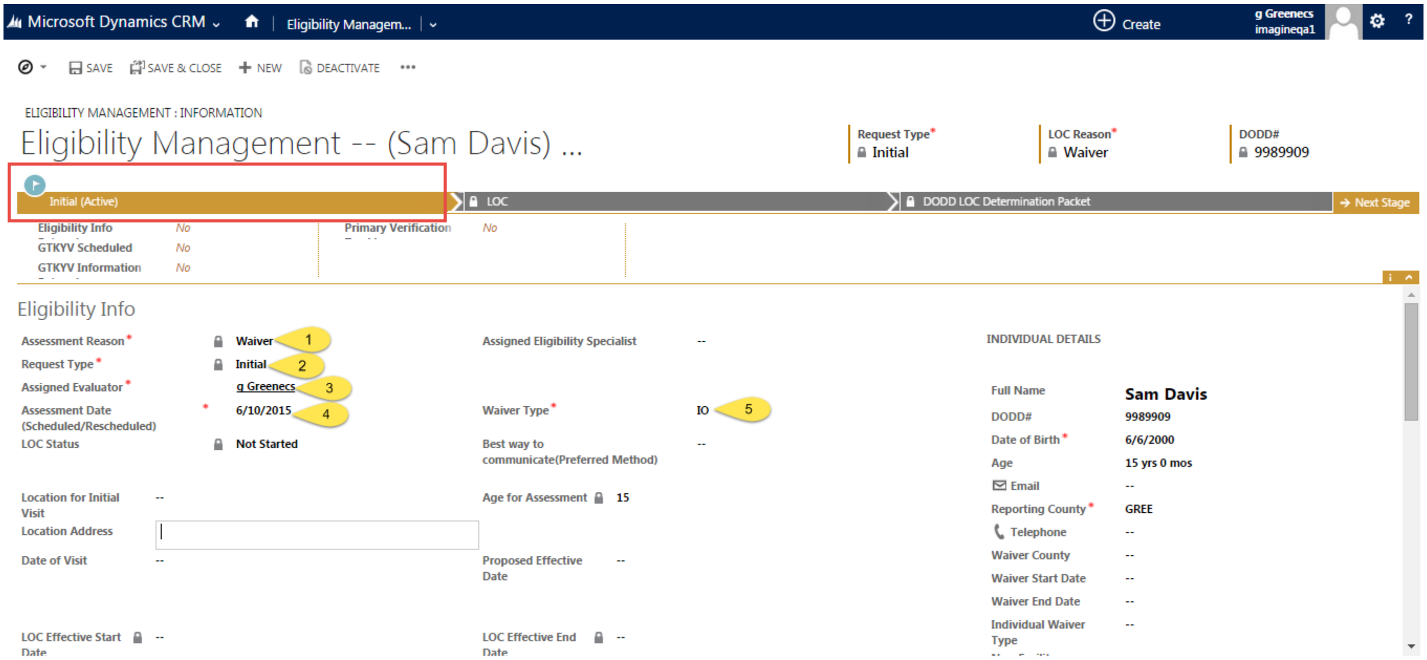
8. **Start Eligibility Process** - Click on the **Eligibility Management Tile** from the dropdown arrow next to individual 's name



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

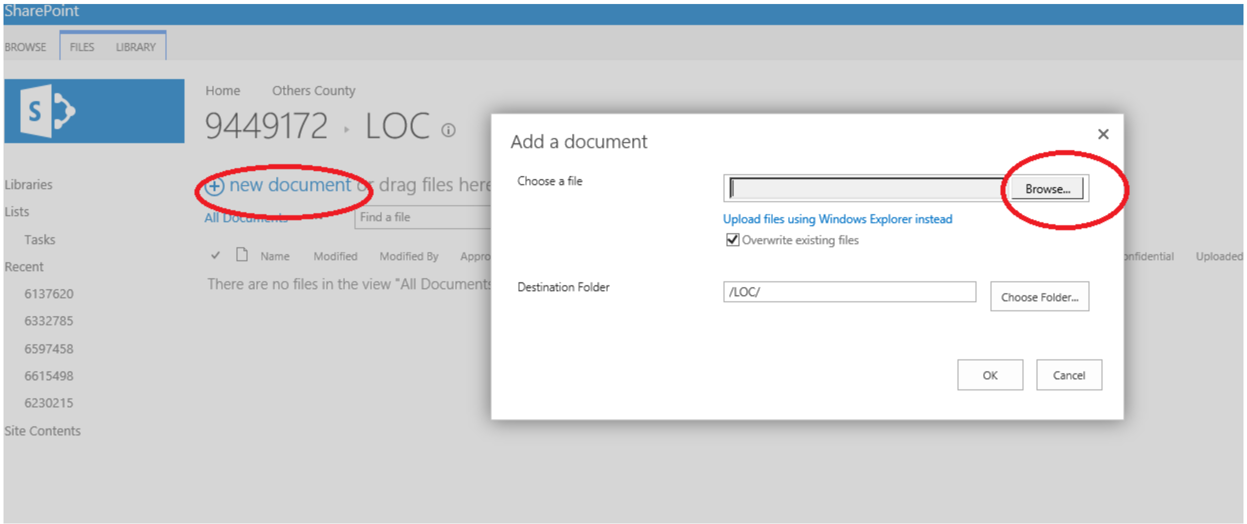


11. Enter required information on **Initial stage** to Save Eligibility management
    1. **Assessment Reason** = select Waiver
    2. **Request Type** = Initial
    3. **Assigned Evaluator** = click on the magnifying and select the evaluator who will complete the LOC for this individual. You can assign yourself if you will do it
    4. **Assessment Date =** can be todays 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

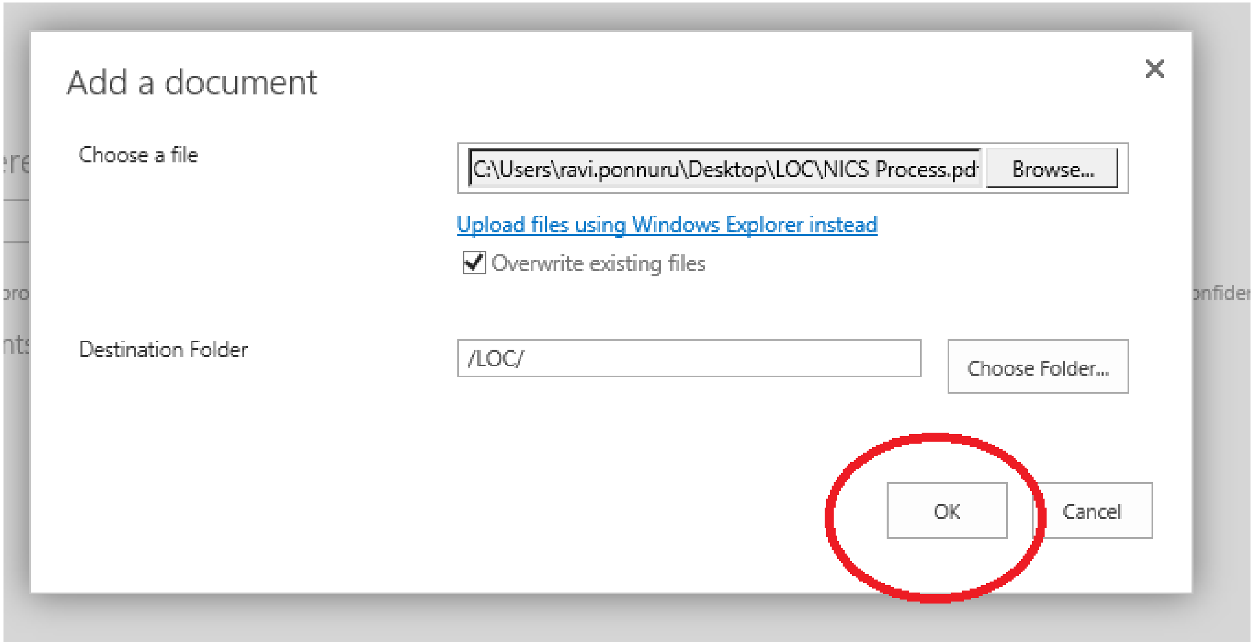

Microsoft Dynamics CRM
Eligibility Managem...
Create
g Greenecs
imagineqa1
SAVE
SAVE & CLOSE
NEW
DEACTIVATE
ELIGIBILITY MANAGEMENT : INFORMATION
Eligibility Management -- (Sam Davis) ...
Request Type*
Initial
LOC Reason*
Waiver
DODD#
9989909
Initial (Active)
LOC
DODD LOC Determination Packet
Next Stage
Eligibility Info No
GTKYV Scheduled No
GTKYV Information No
Primary Verification No
Eligibility Info
Assessment Reason* Waiver 1
Request Type* Initial 2
Assigned Evaluator* g Greenecs 3
Assessment Date (Scheduled/Rescheduled) * 6/10/2015 4
LOC Status Not Started
Assigned Eligibility Specialist --
Waiver Type* IO 5
Best way to communicate(Preferred Method) --
Location for Initial Visit --
Location Address
Age for Assessment 15
Date of Visit --
Proposed Effective Date --
LOC Effective Start Date --
LOC Effective End Date --
INDIVIDUAL DETAILS
Full Name Sam Davis
DODD# 9989909
Date of Birth* 6/6/2000
Age 15 yrs 0 mos
Email --
Reporting County* GREE
Telephone --
Waiver County --
Waiver Start Date --
Waiver End Date --
Individual Waiver Type --

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

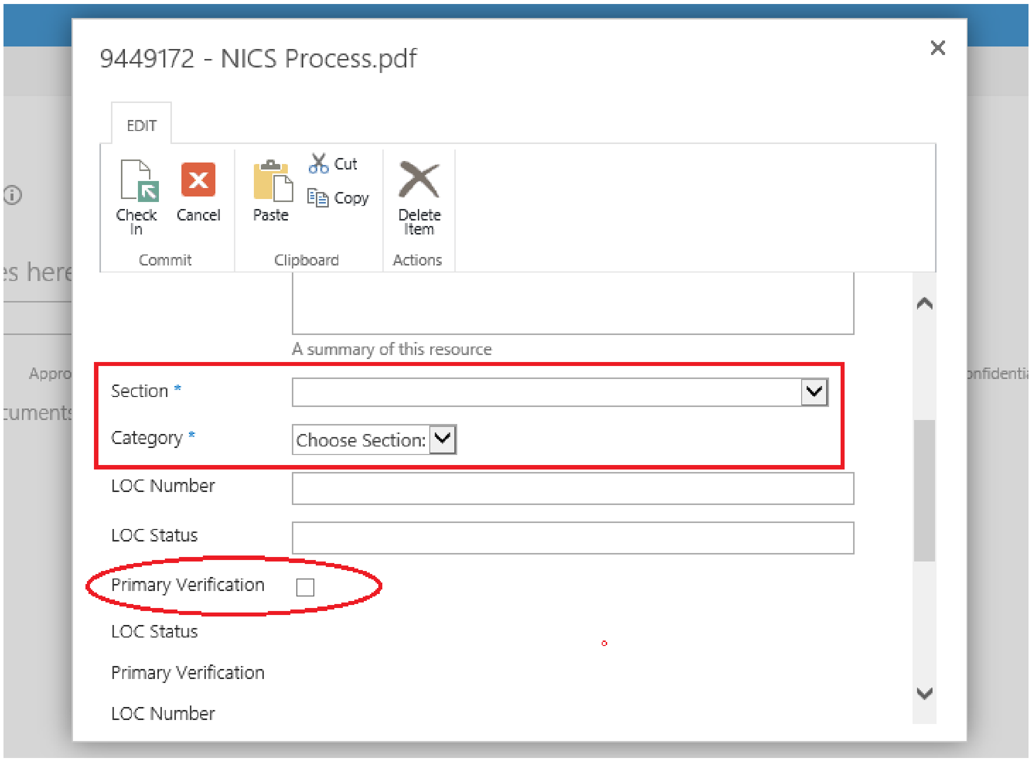
1. Click on **+new document**
2. Click on **chose file**



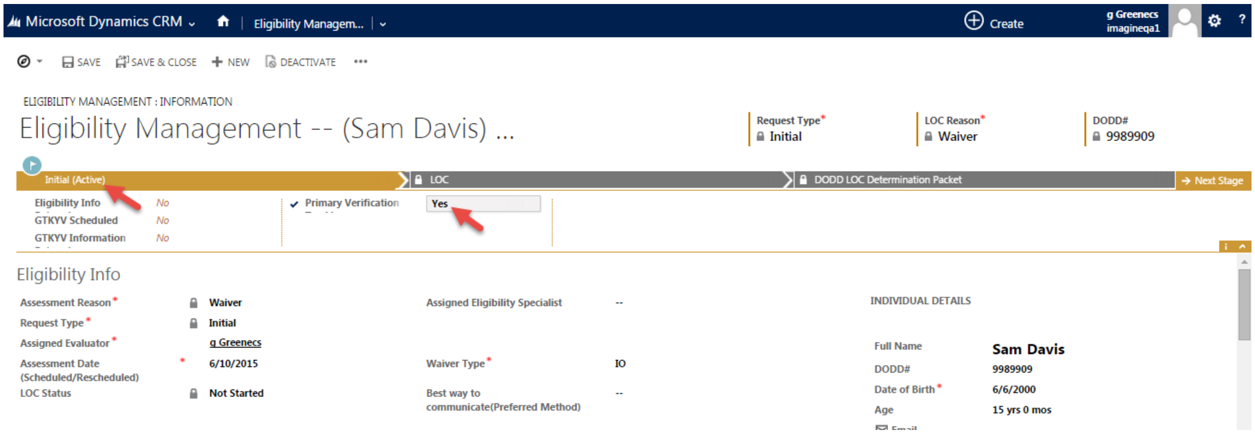
3. **Select the document you want to upload** (has to be a scanned PDF or image from your desktop) → either double click on the document or click on "Open" once done selecting
4. You will be back on previous screen → **Click on OK**



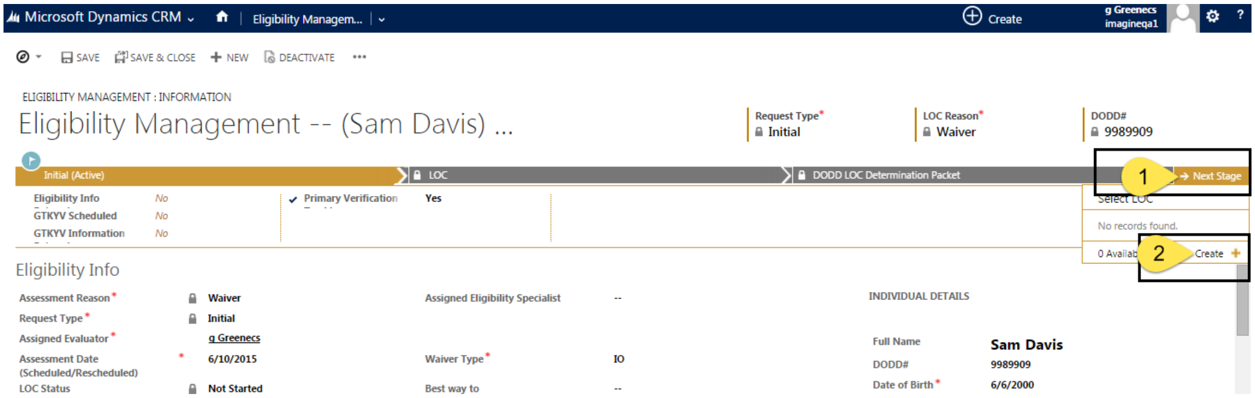
5. **You will another pop up will appear → Name** will be filled for you, you can enter **Title** and **Comments** if you like (not required)
6. **Add Section →** Select "**LOC**" from the option set
7. **Add Category→** Select the reason for what you are uploading the document → in this case it should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

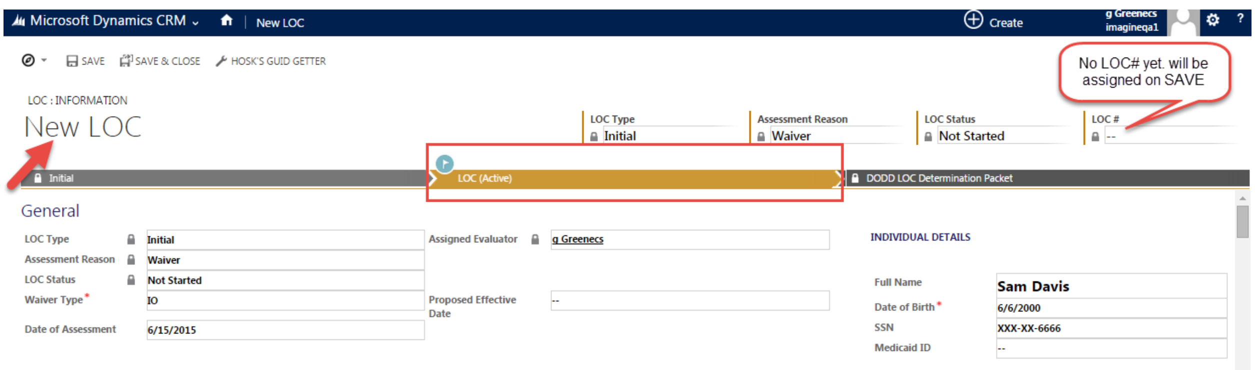
13. On top of Initial Stage →Check **Primary Verification** as **YES** – This is a manual check for the user to confirm that user has uploaded the primary verification document to support this LOC



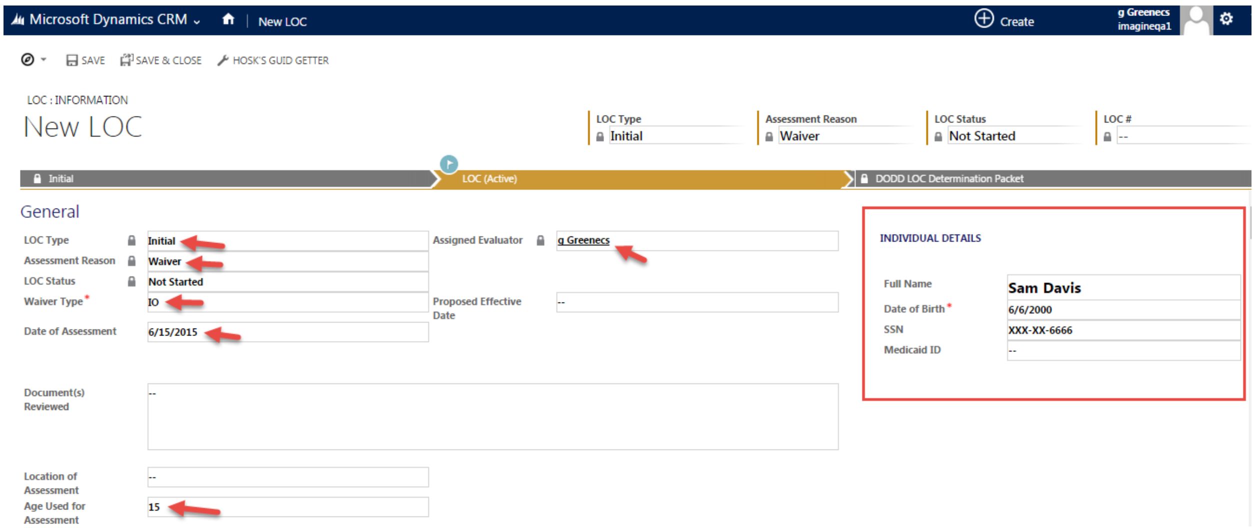
14. Move to **LOC stage →** by clicking on the **"Next Stage"** and **Create+** on Next Stage



15. User will now be on the LOC tool

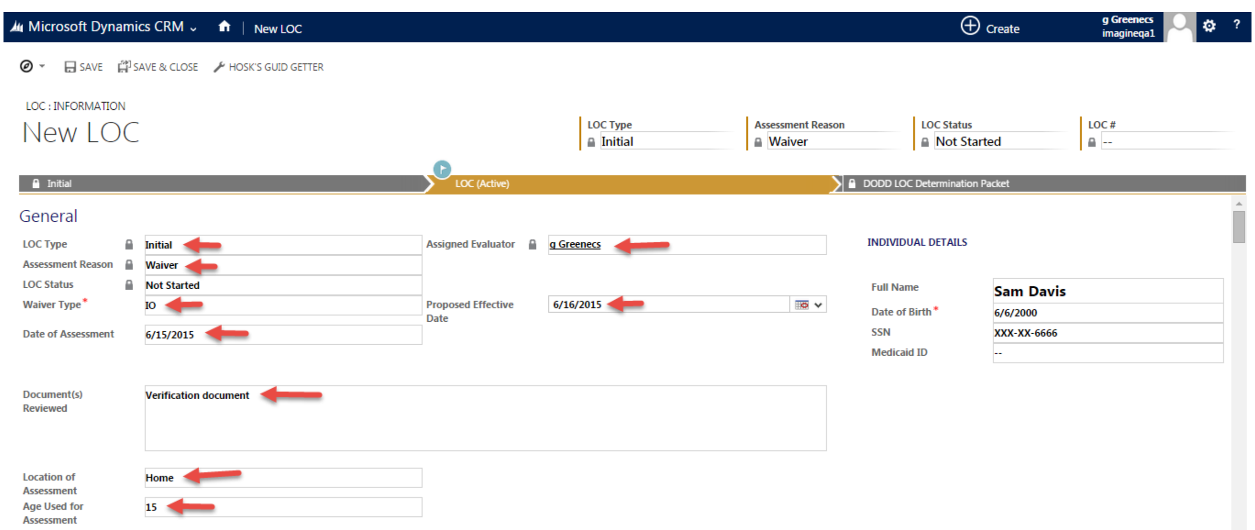


16. User will view some information that was already entered before and will have a lock symbol next to it, which means they are not editable

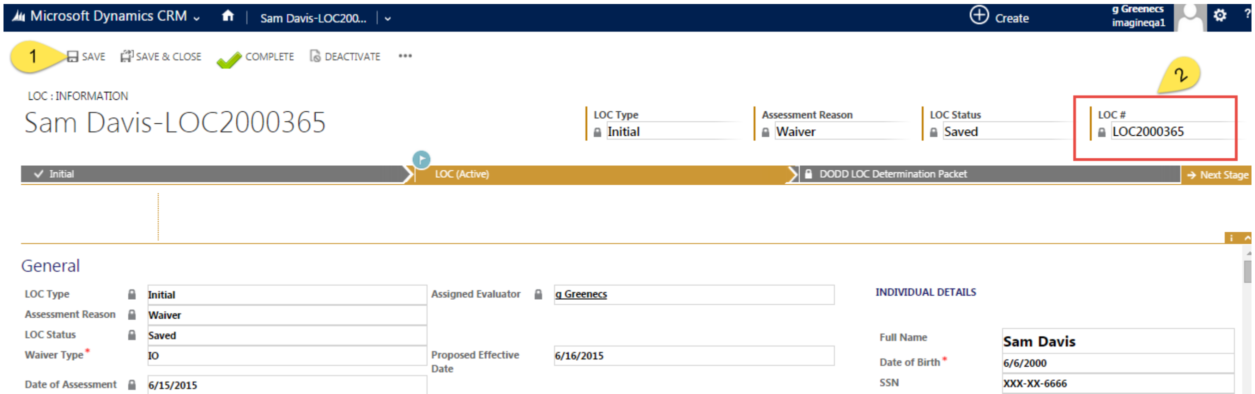


17. **All fields on LOC are REQUIRED** to complete LOC

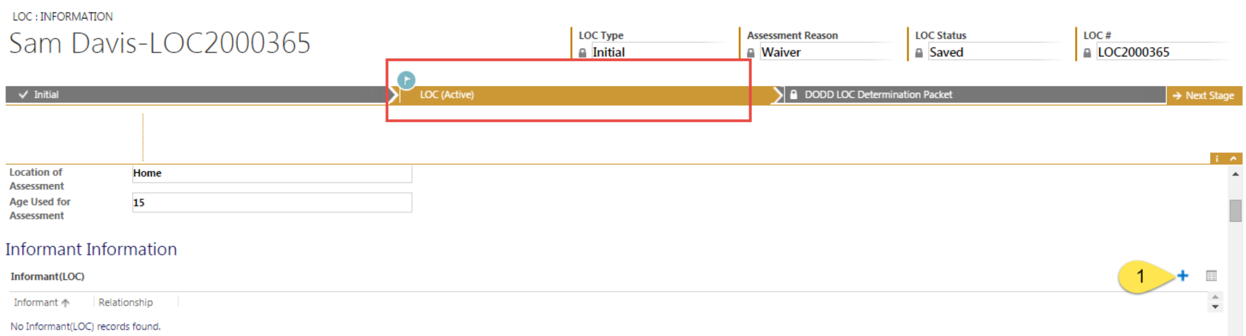
18. **Enter the General information on LOC**

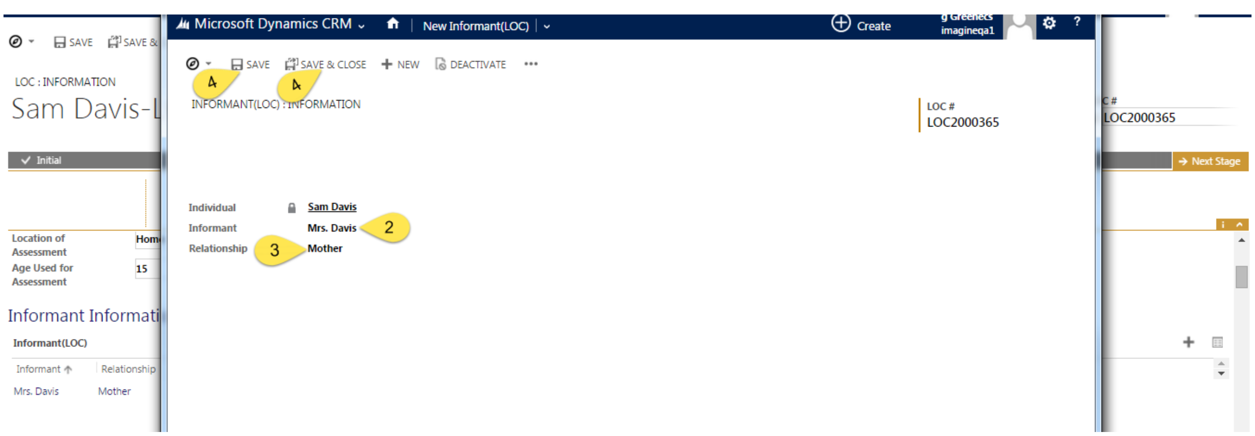


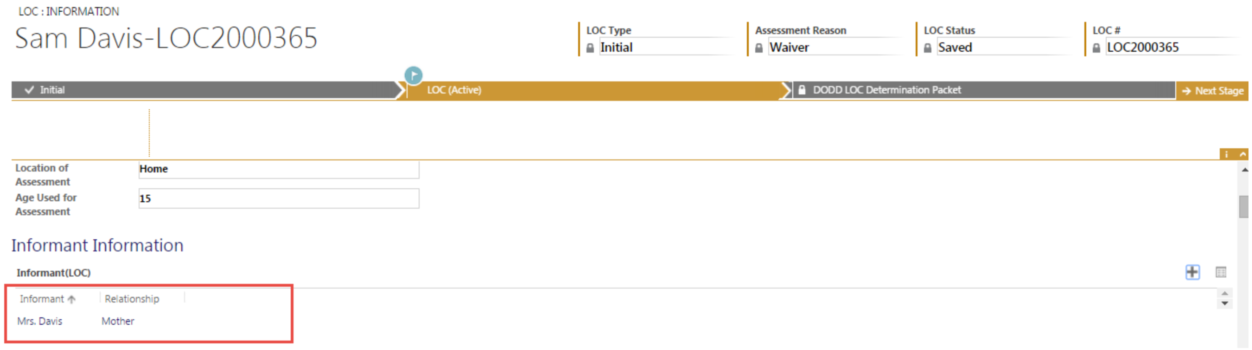
19. Save LOC at any time → LOC# is generated on Save



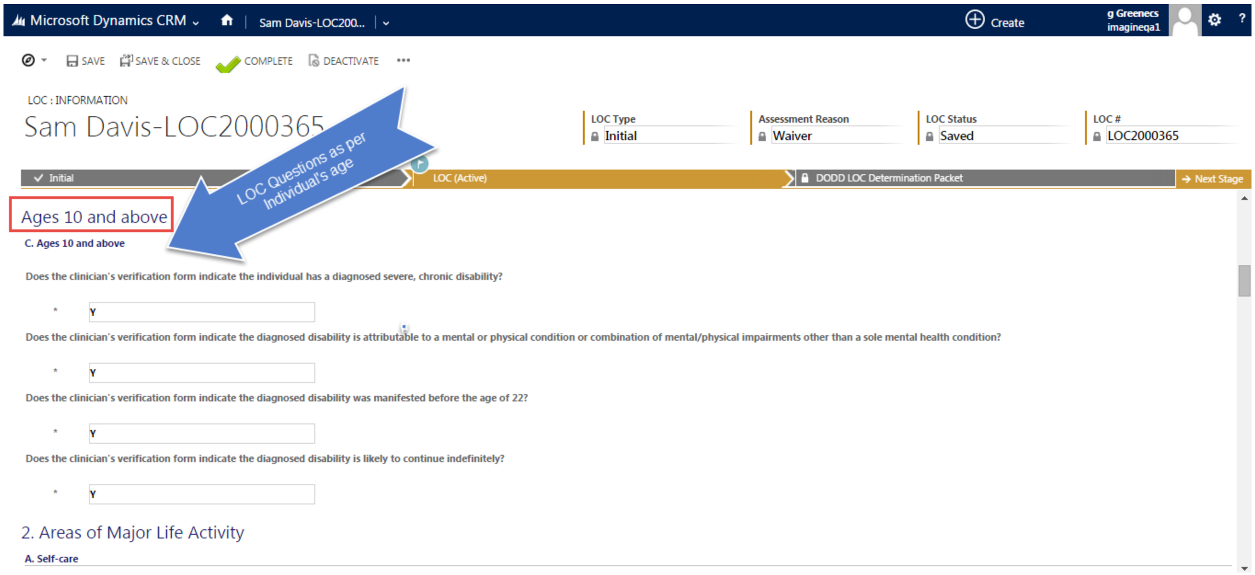
20. **Add informant** by clicking on the + sign on your right hand side (this plus button will appear after saving LOC)→ enter informant's name and relationship with individual in the pop up that will appear



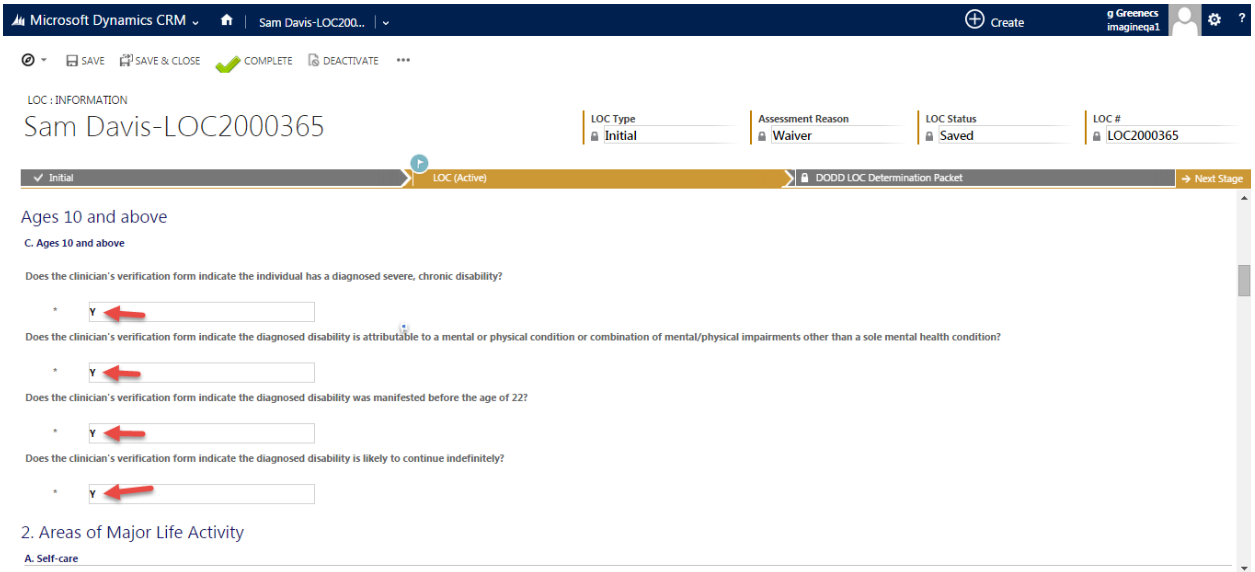


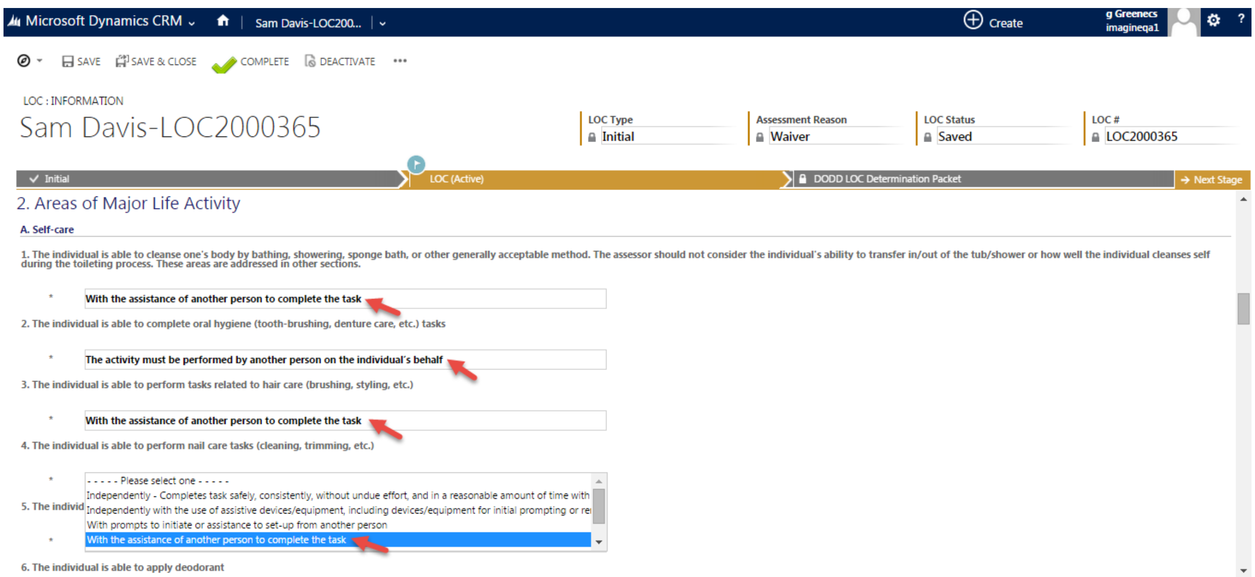


21. Evaluator will see **LOC questions as per Individual's Age of Assessment (9 and below or 10 and above)**

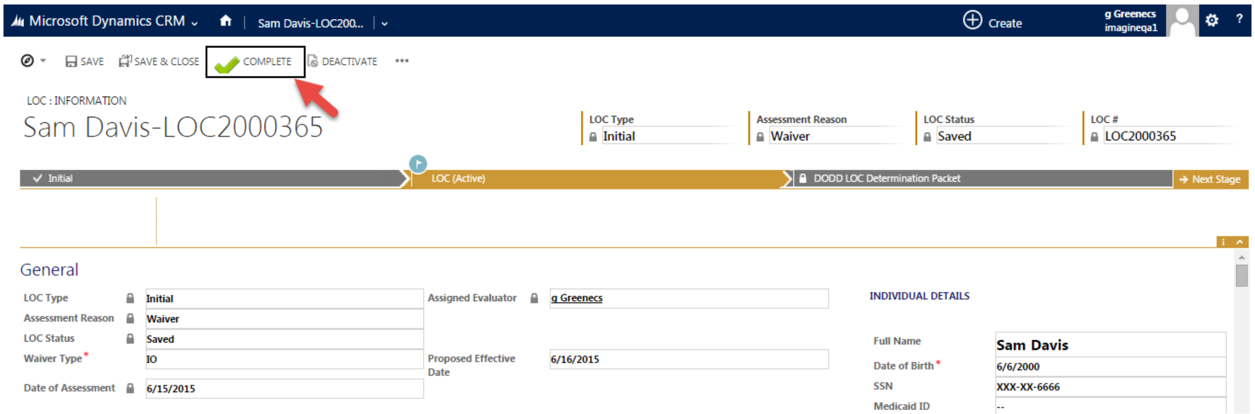


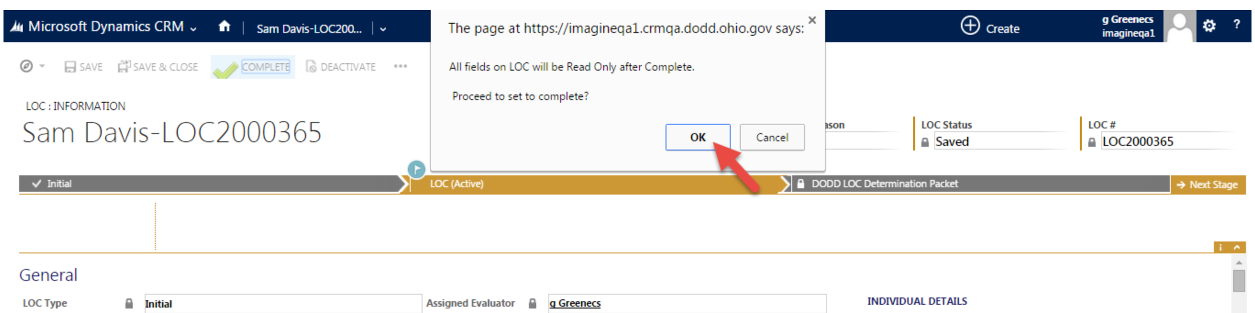
22. Answer all questions

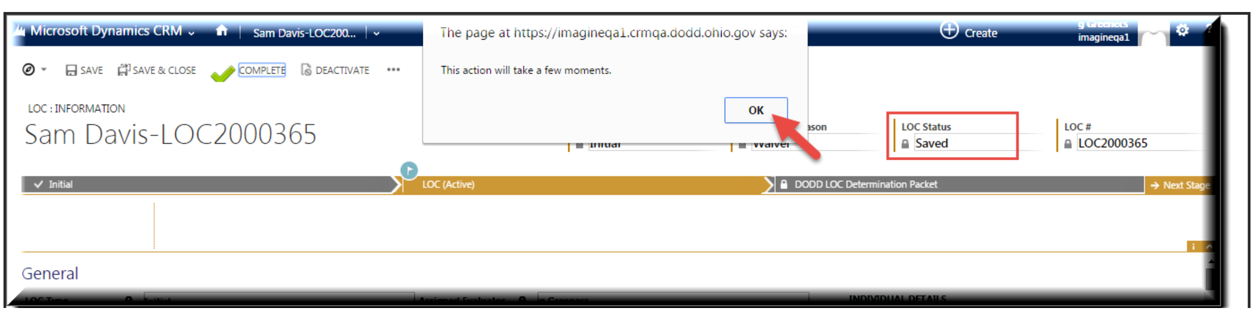




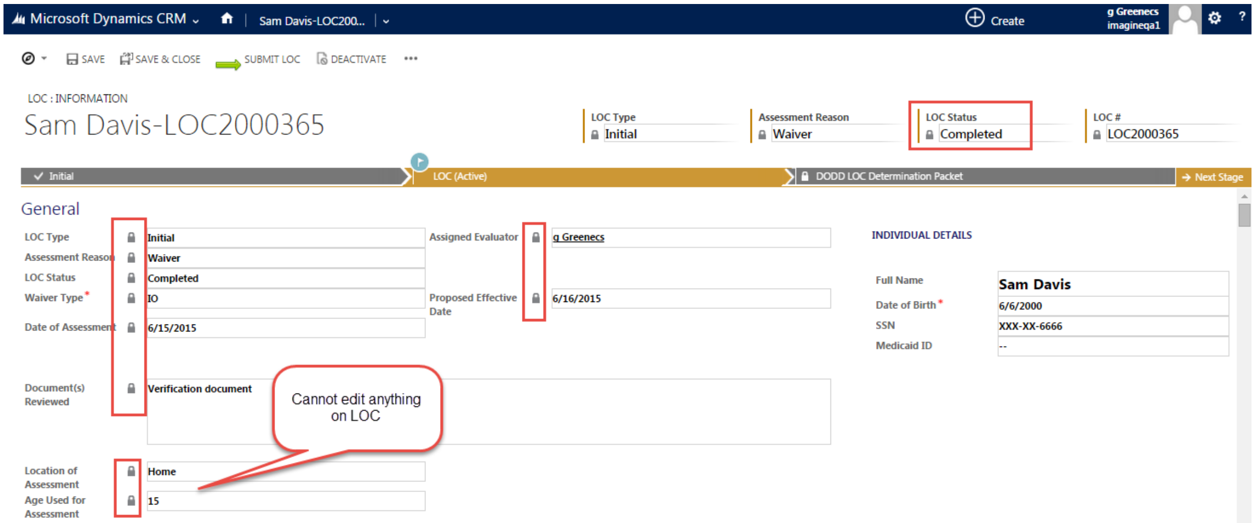
23. **Complete LOC** by clicking on the “**Complete**” button; once all information on LOC is entered

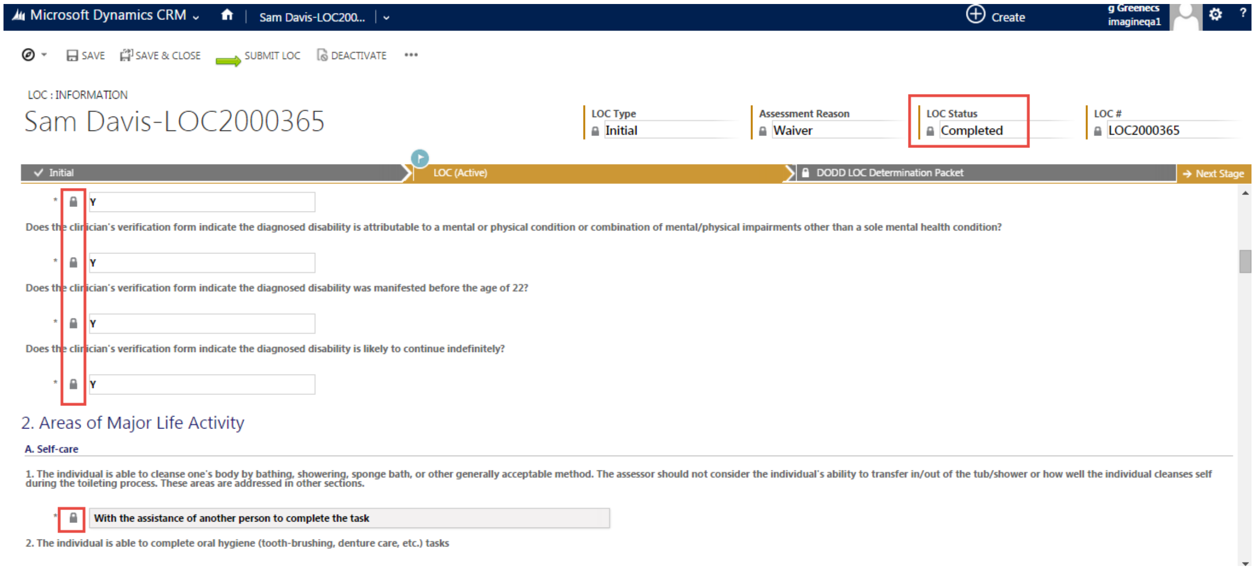




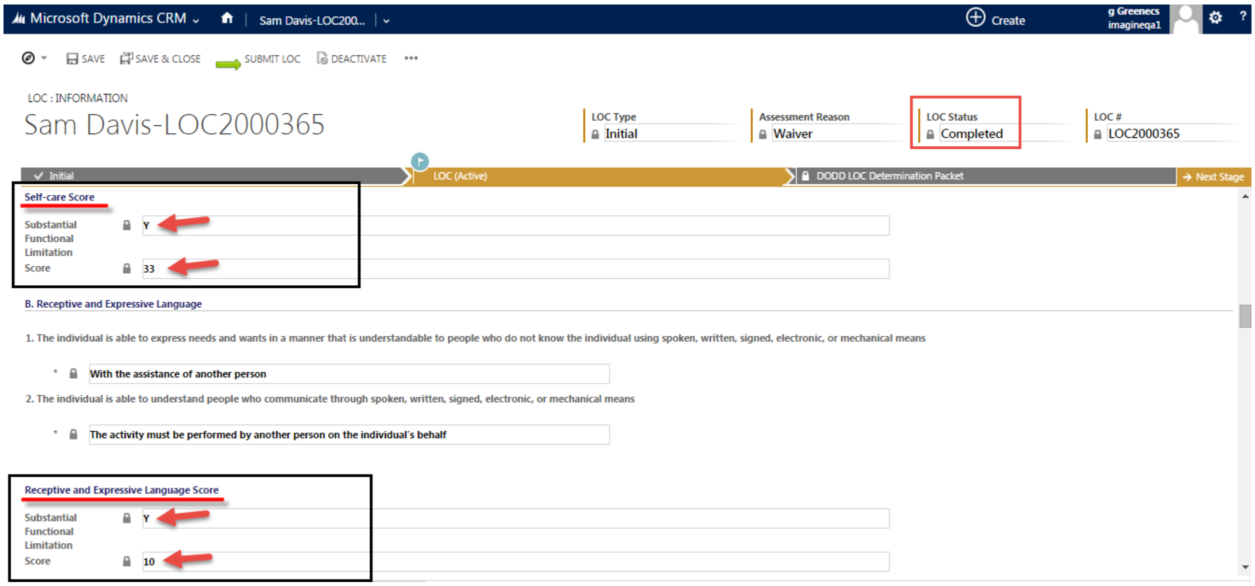


24. Once LOC is Completed→ LOC becomes read only; user will see the lock symbol next to all the fields and cannot edit anything now.

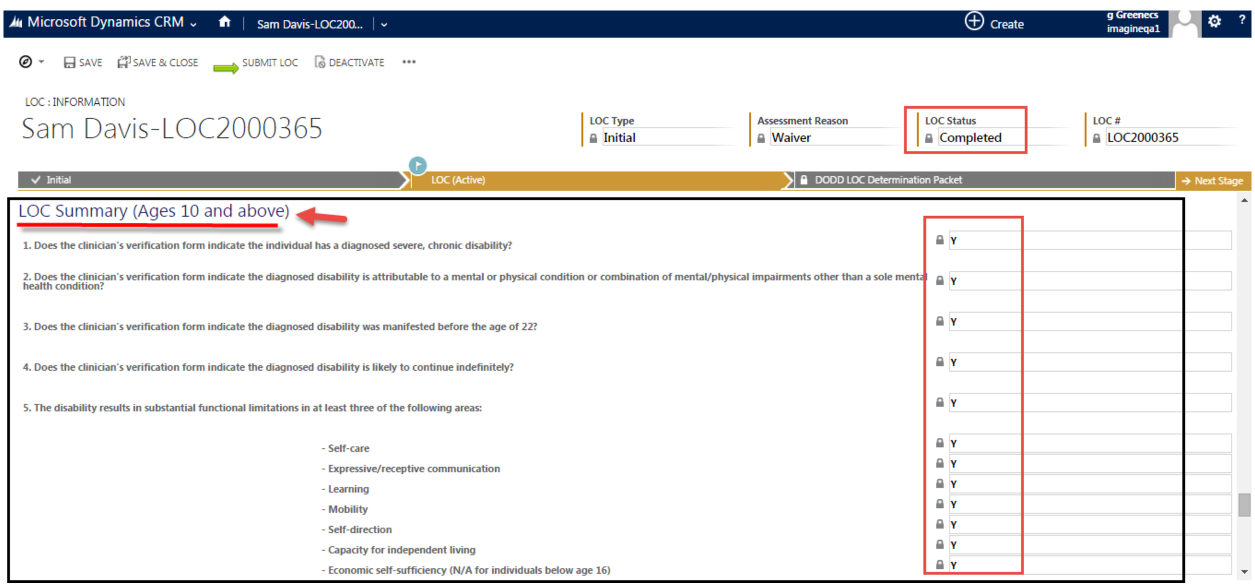




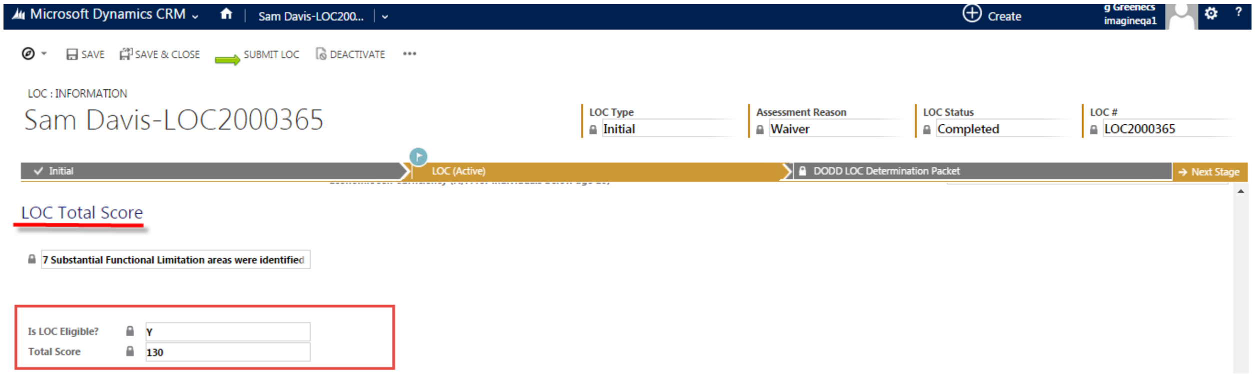
25. View **Score per Section** (major life area) after LOC is Completed



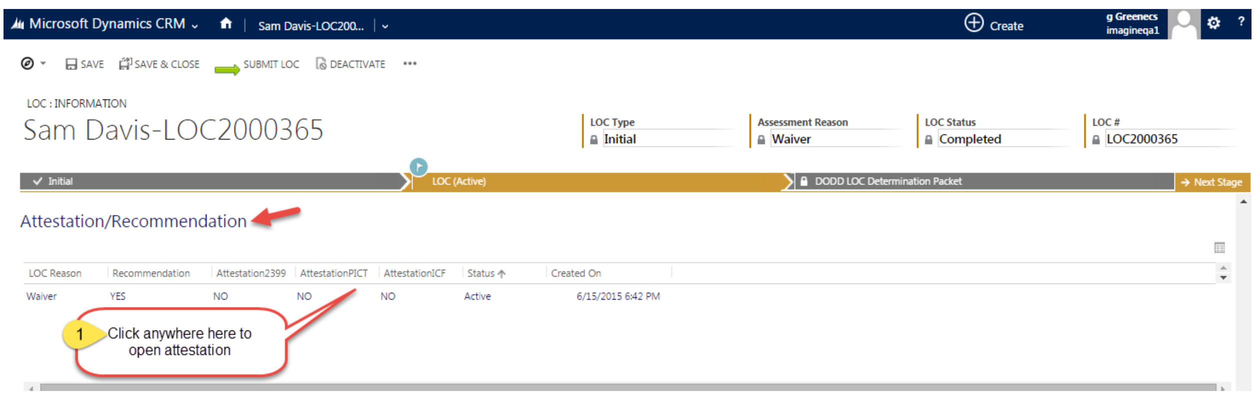
26. View **LOC Summary** after LOC is Completed



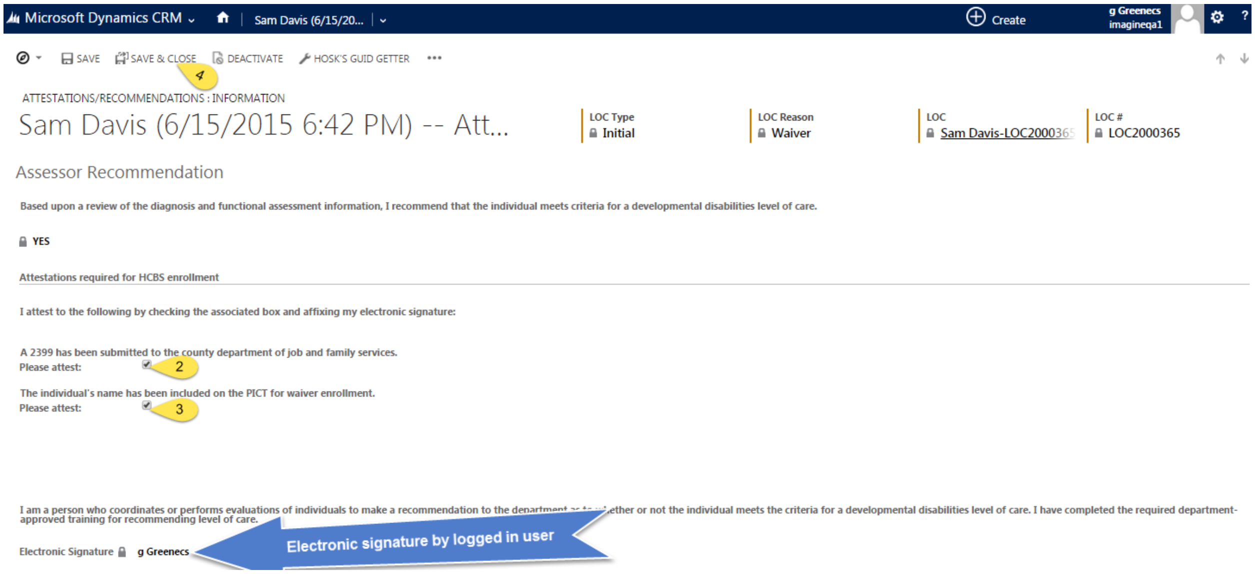
27. View **LOC LOC Eligible = YES/NO** after LOC is Completed



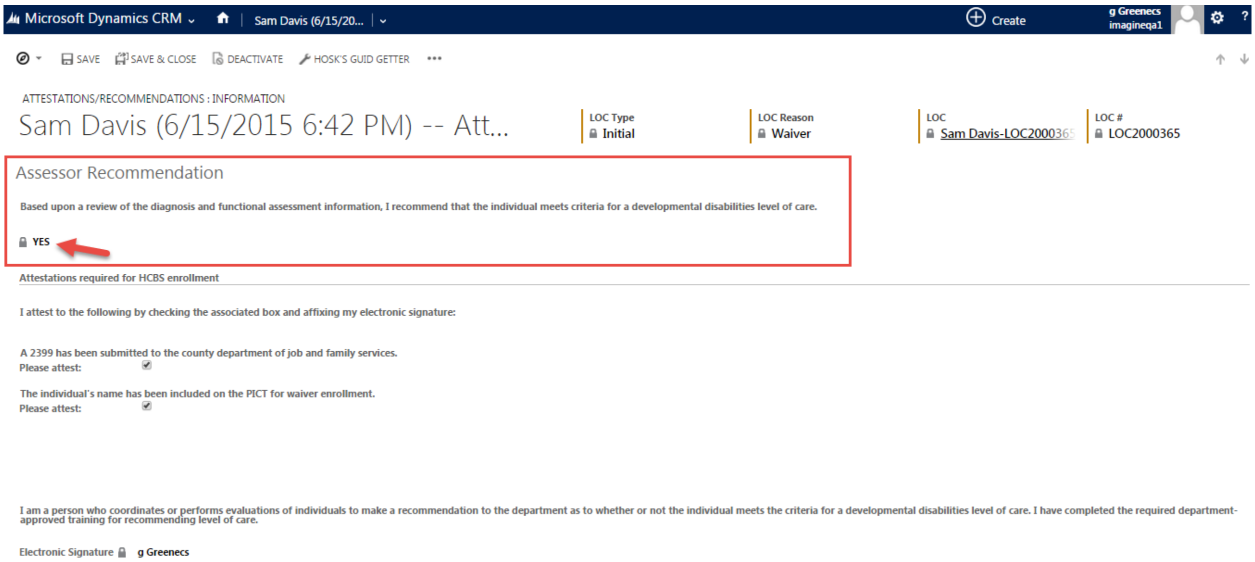
28. **Complete Attestation** – 2399 and PICT by clicking on the attestation record at the bottom of the LOC, under the Attestation Tab on LOC



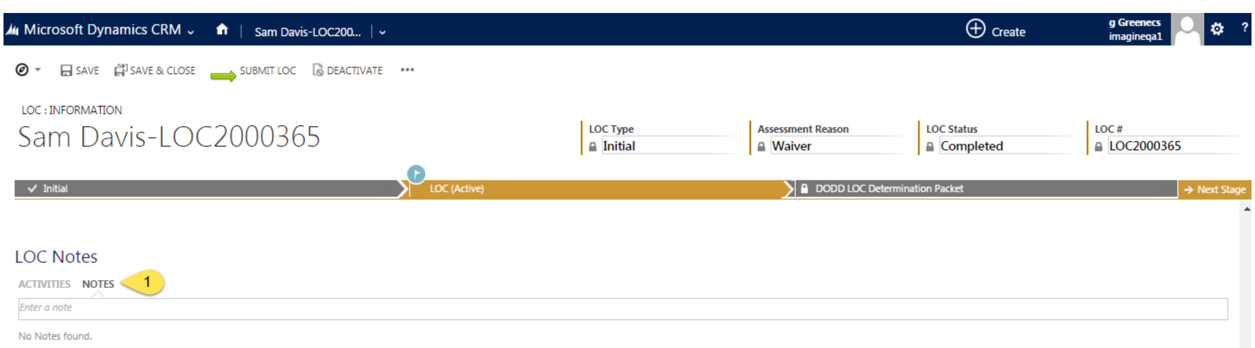
29. **Attestation will open in a new window** → check mark both PICT and 2399 → Click on Save and Close (on the top of this screen)



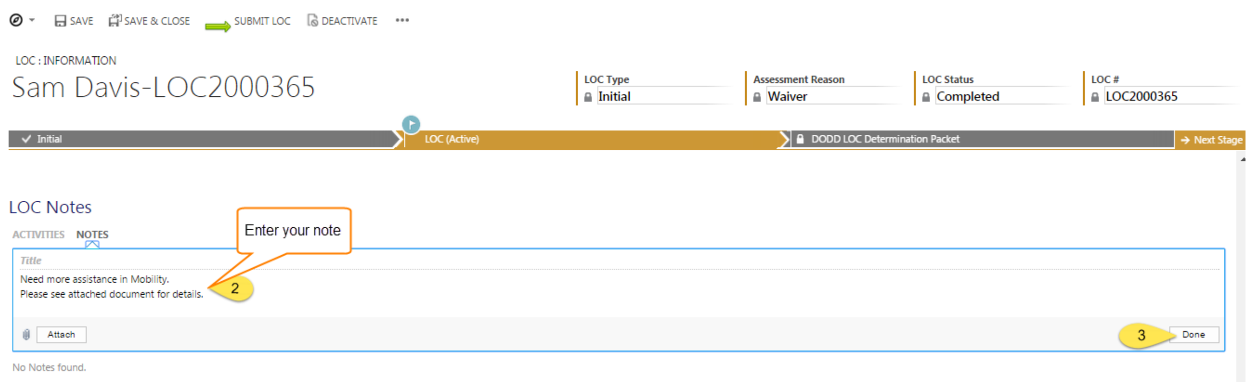
30. **Assessor Recommendation will auto populate based on the result of the LOC and cannot be edited by the Evaluator**. If LOC Eligible = YES, assessor recommendation will = YES; if LOC Eligible = NO, assessor recommendation will = NO. Evaluator can view this on the attestation screen.



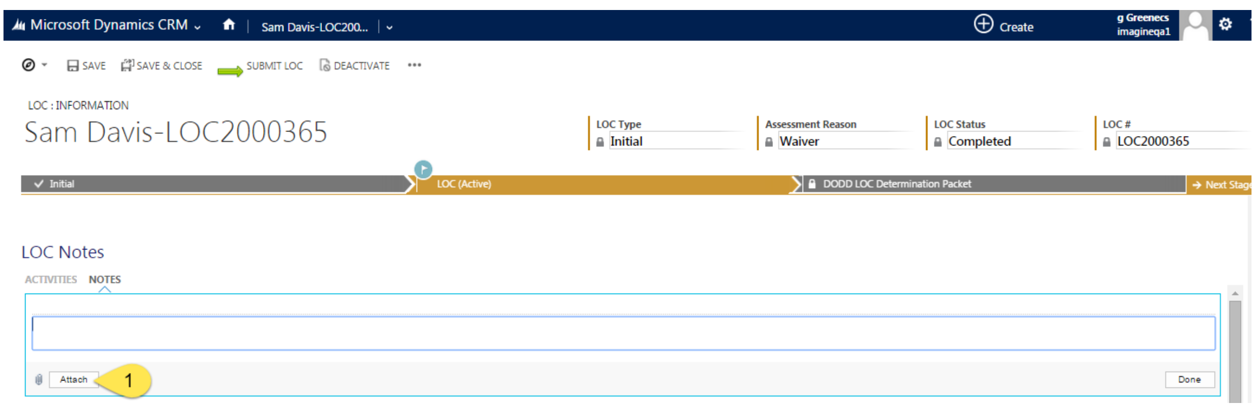
31. **Add notes for LOC if needed** – this is not required field. Scroll down at the bottom of the page, you will see **LOC Notes tab** below Attestation tab. Click on Notes to enter "Notes".

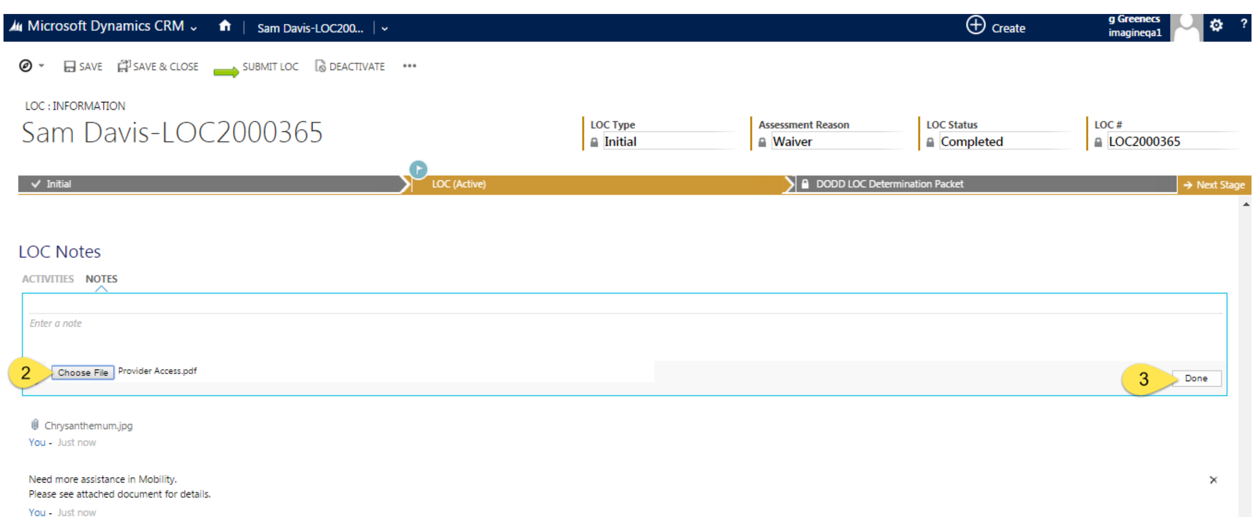


Enter notes and click on DONE



Can also attach a document with the notes

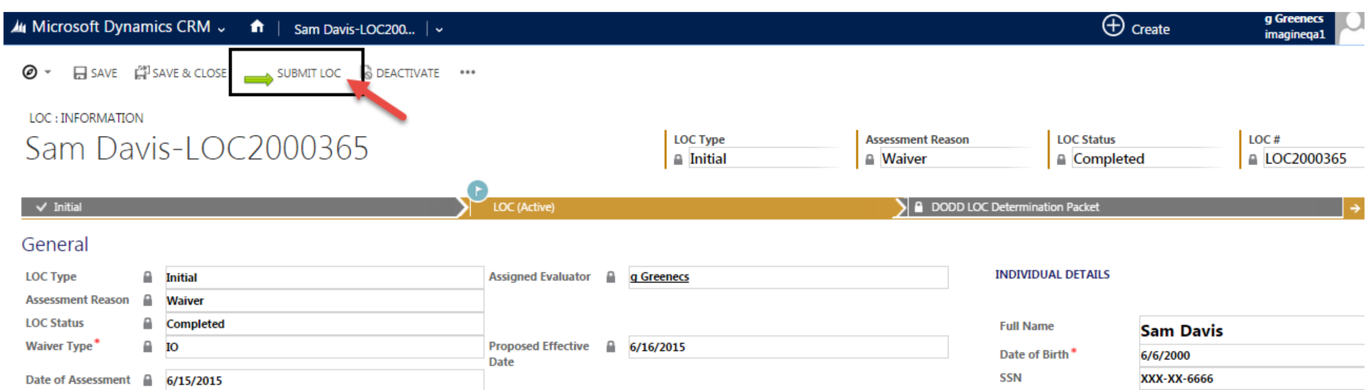




32. Submit LOC to DODD by clicking on the Submit button available on top of the LOC stage**.**

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

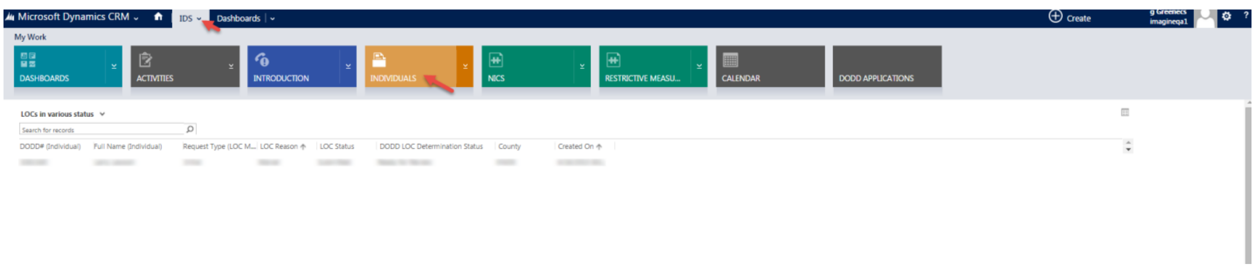


You have successfully submitted the LOC to DODD; once DODD has processed the LOC, you will receive an alert for status updates and/or approval.

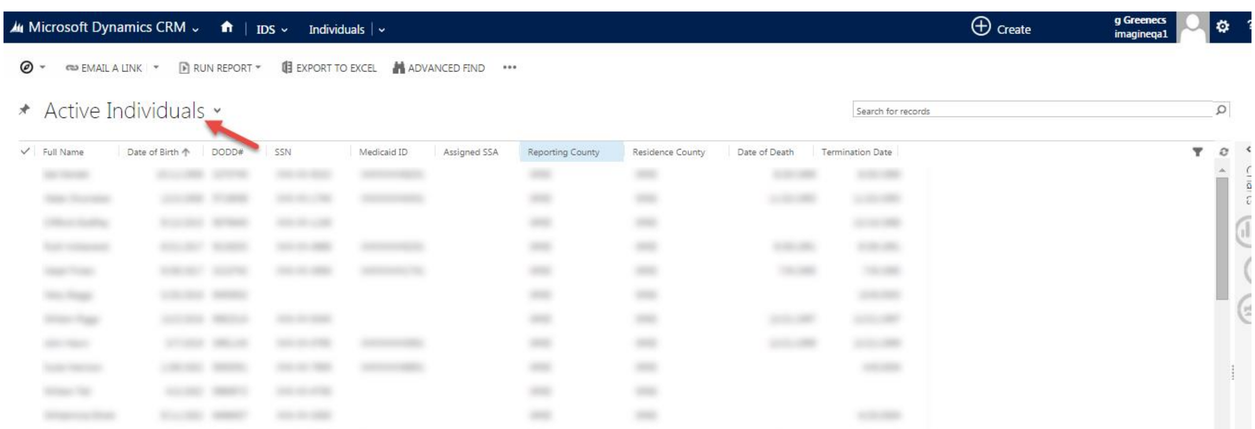
Waiver NICS (Notification of Individual’s Change in Status)

Waiver County Transfer NICS

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

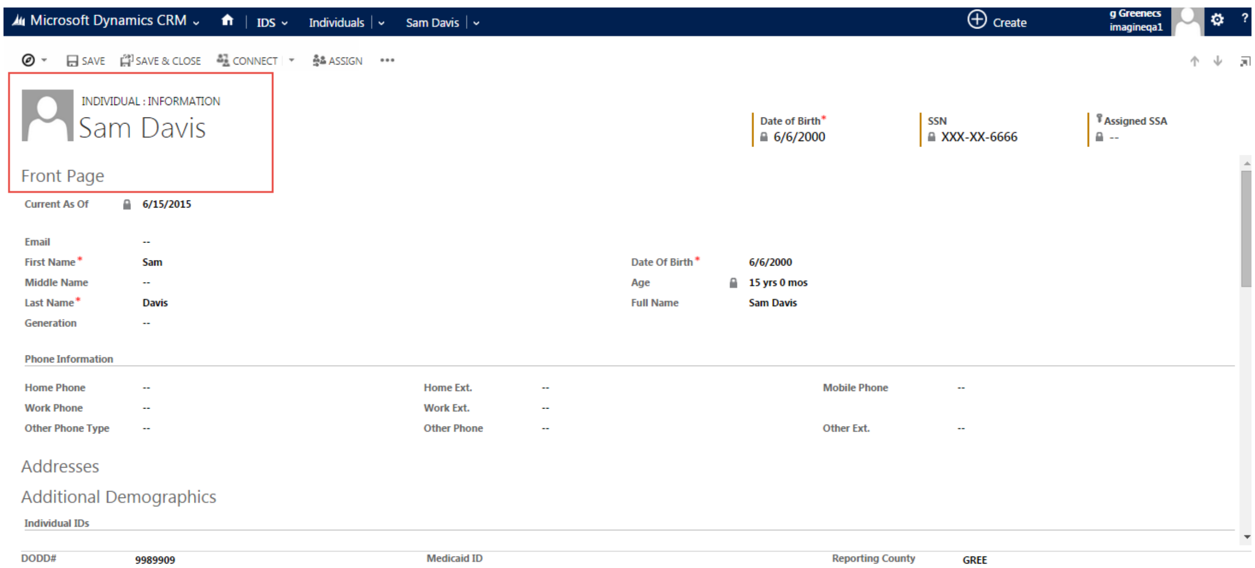


2. You will see list of **Active Individuals in your county**

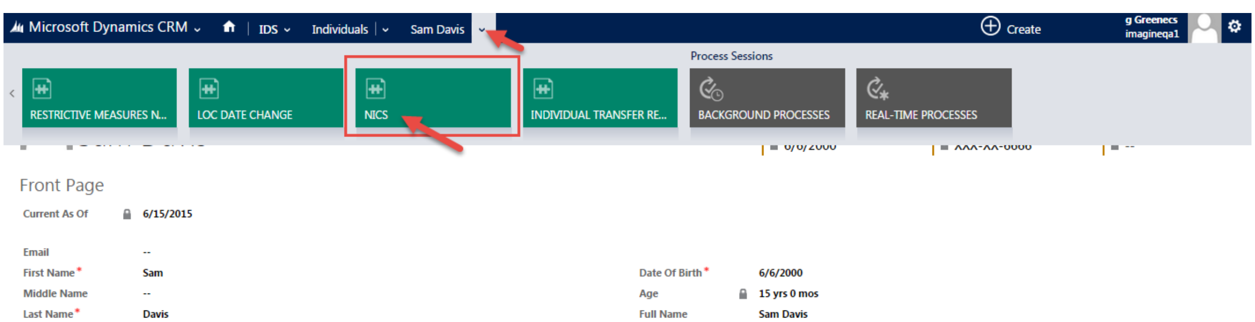


3. **Search for individual** by typing name in search box
4. Hit **Enter** or click on the magnifying glass next to search box
5. **Individual record will show up** if individual exist in your county

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

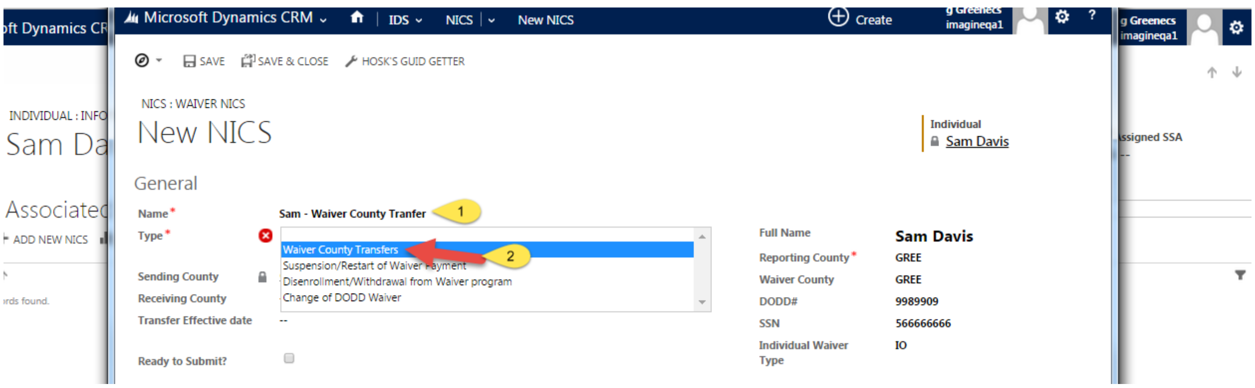


9. User will land on **NICS View Page**—you can see all the eligibilities done for that individual

10. **Add New NICS**

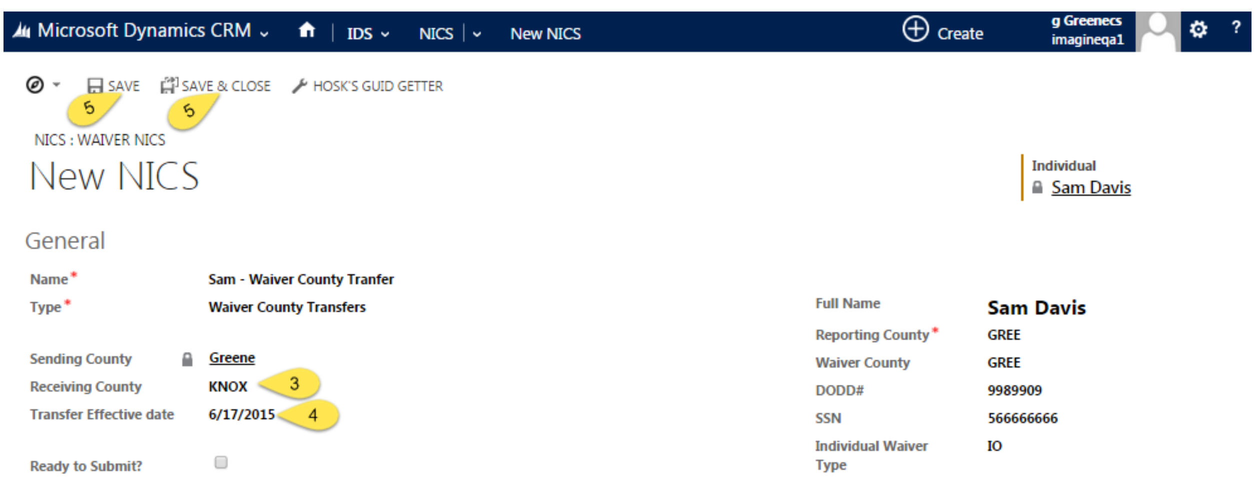
11. Add a Name for your NICS

12. Type of NICS = Waiver County Transfer NICS

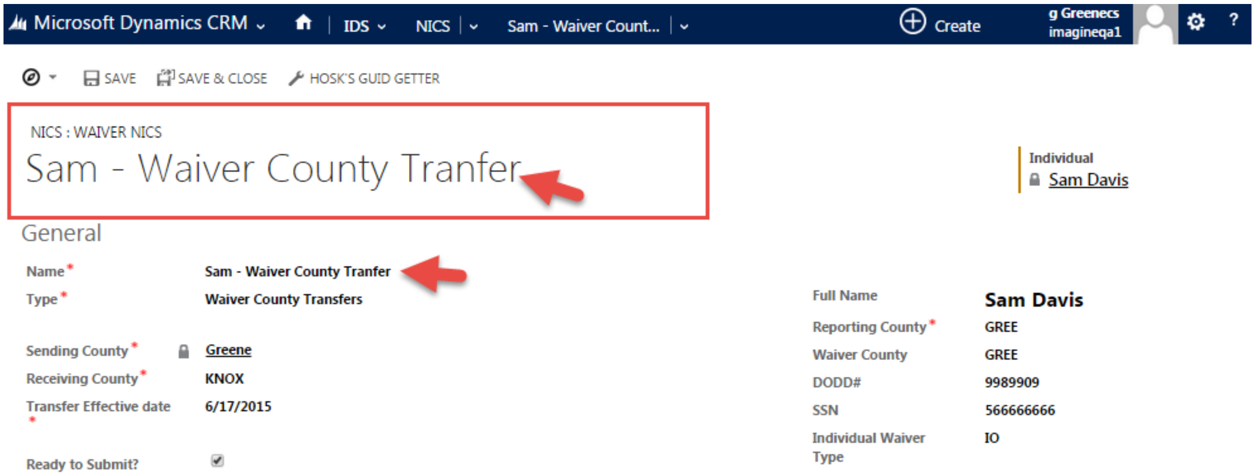


13. Enter all Required Information

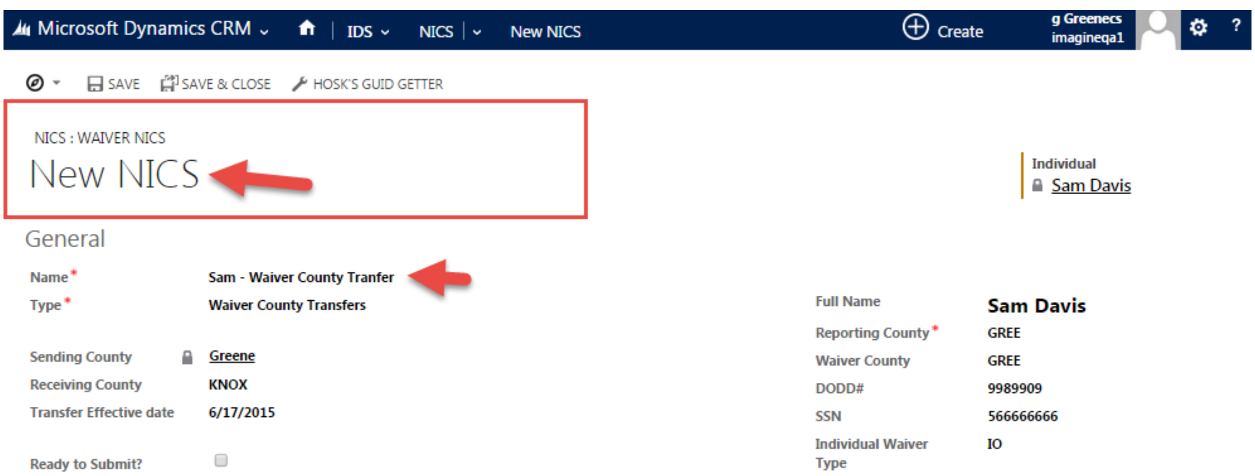
14. SAVE or SAVE and CLOSE at any time



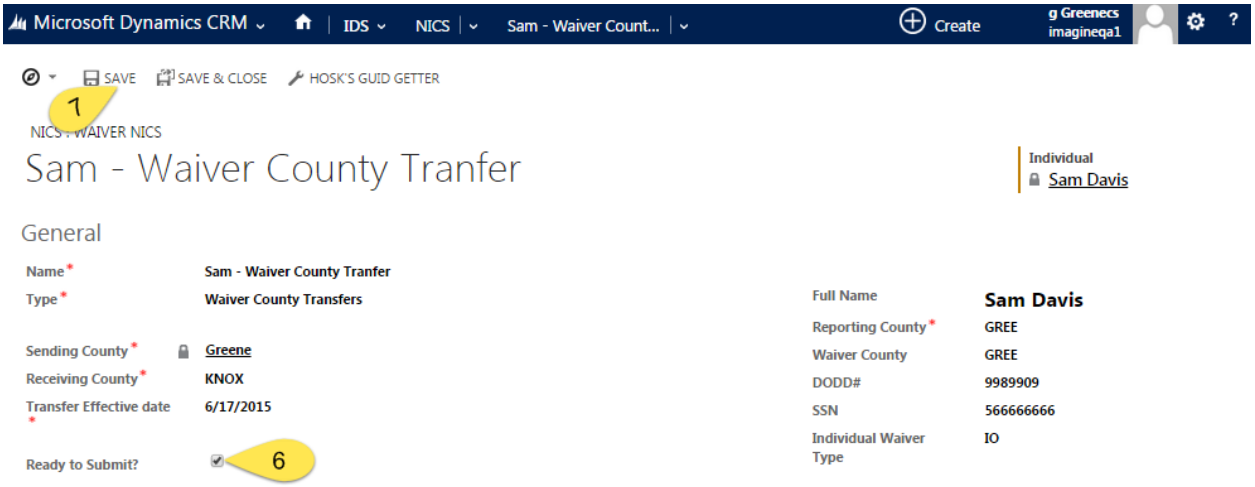
15. After save – NICS Name will display on top of this NICS form



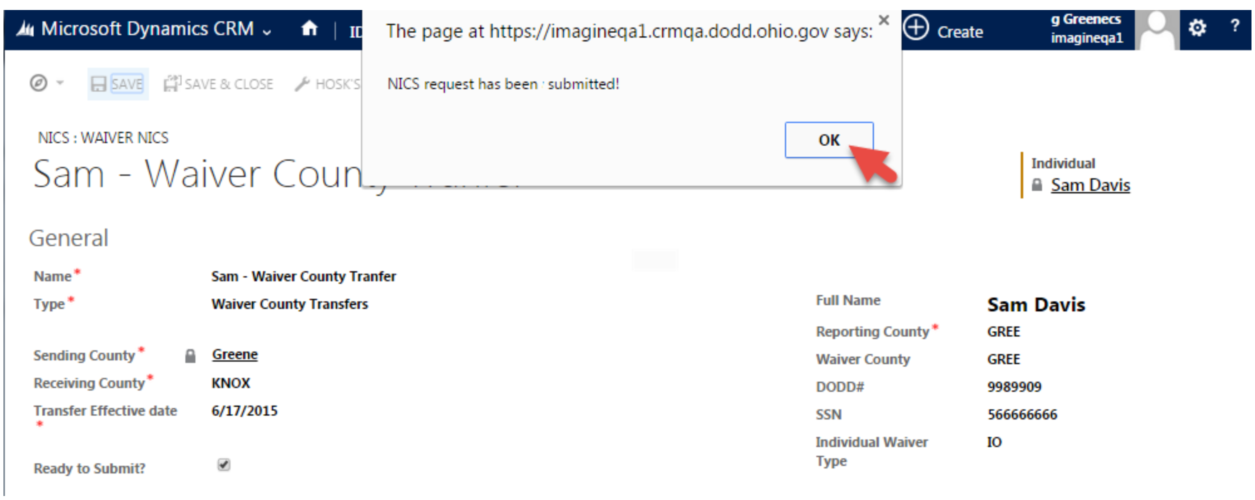
Before SAVE



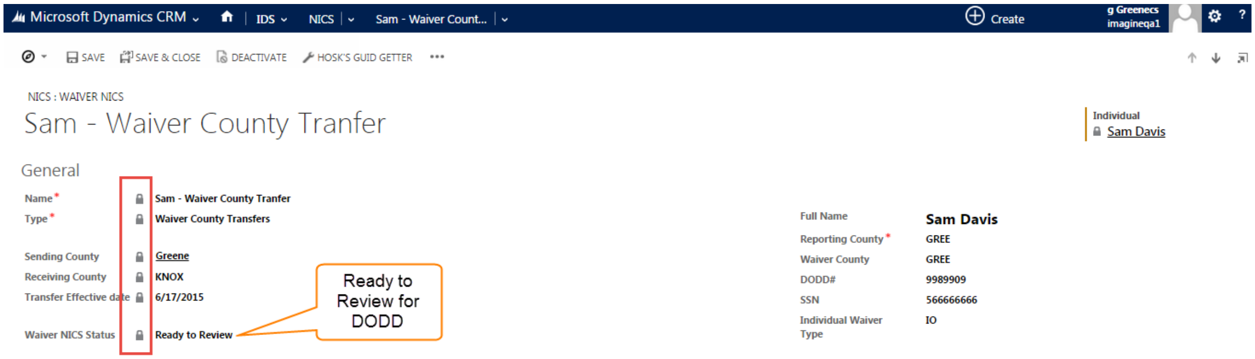
16. Once ready to Submit → **Check mark the checkbox next to Submit** and click on Save



17. NICS Submitted to DODD



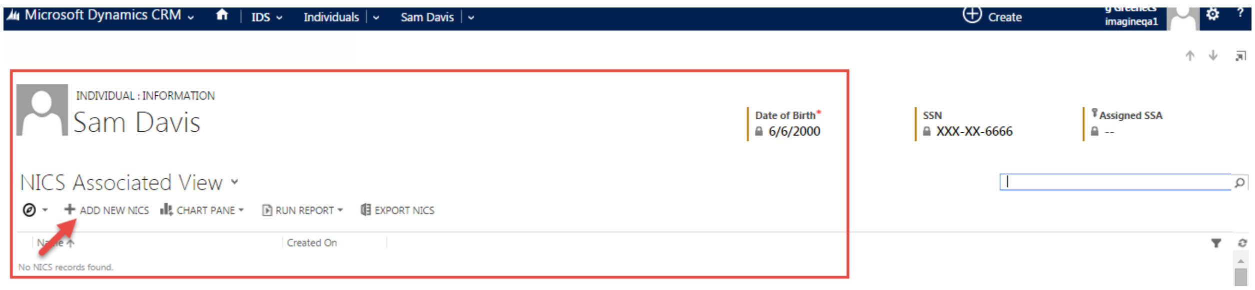
18. All fields on **NICS will be read only**; user will see the lock symbol next to all the fields and cannot edit anything now



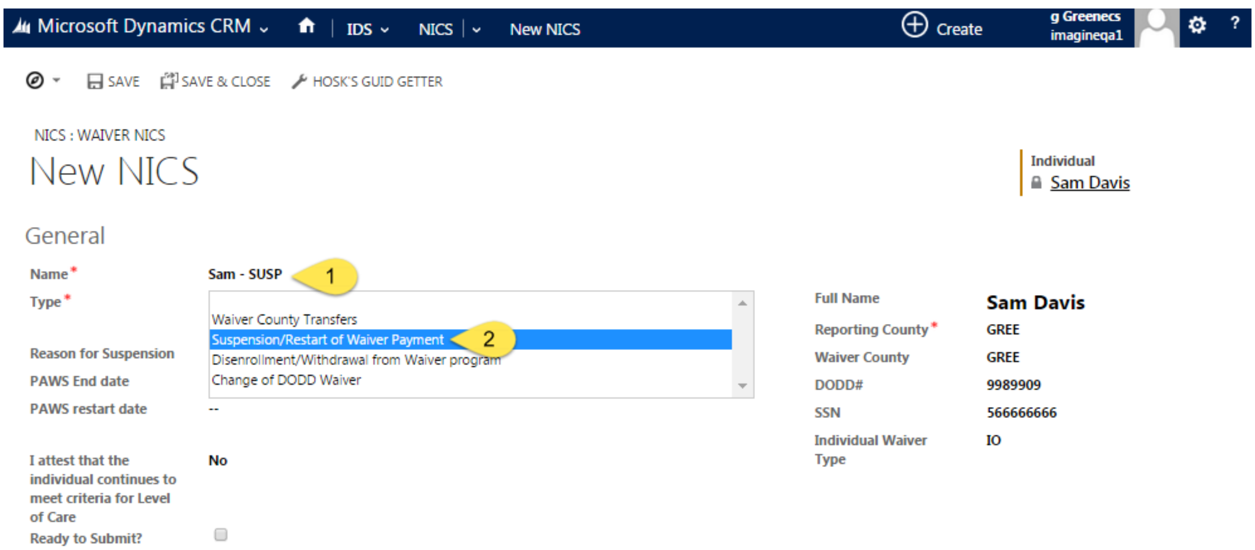
You **successfully submitted a Waiver NICS to DODD**

Suspension/Restart of Waiver Program NICS

1. **Add New NICS**

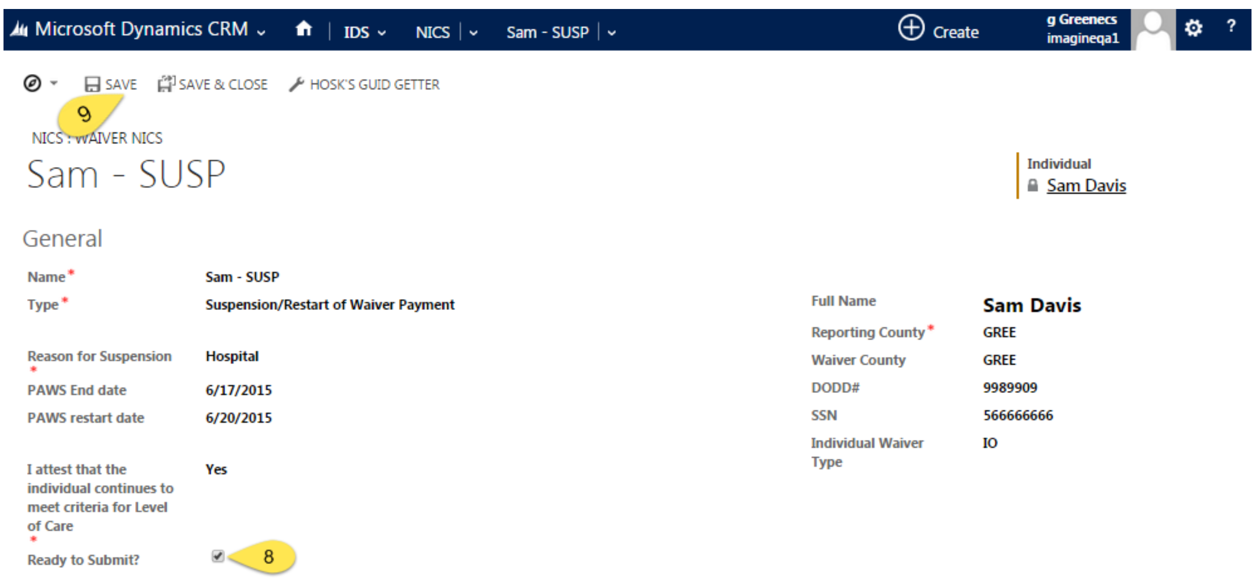


2. Add a Name for your NICS
3. **Select Type of NICS = Suspension/Restart of Waiver Payment NICS**

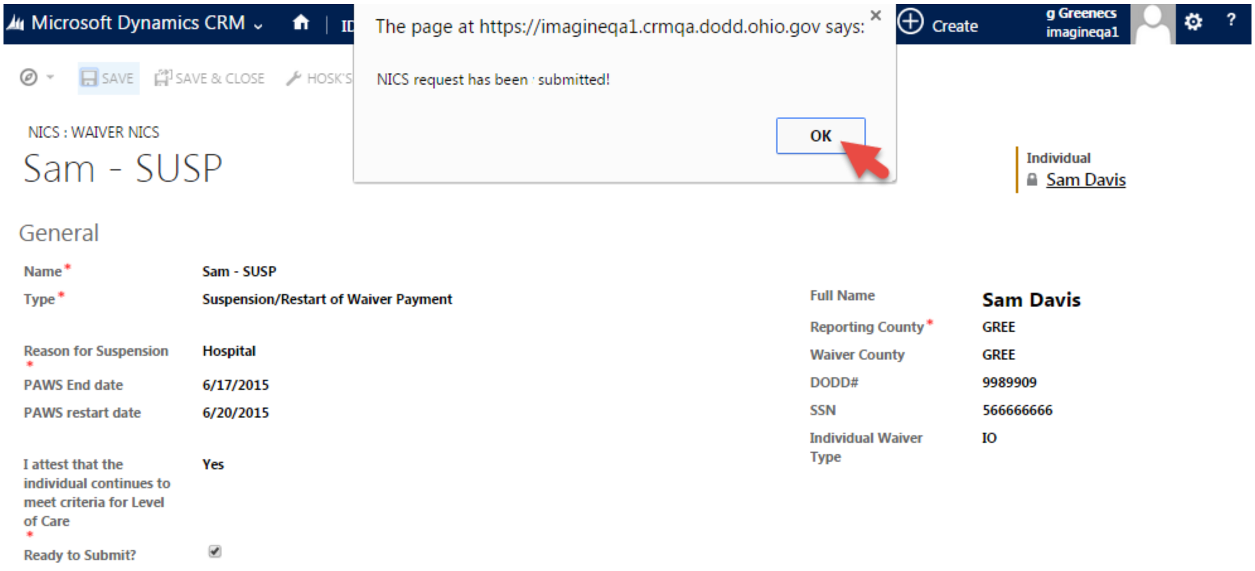


4. Enter all Required Information
5. SAVE or SAVE and CLOSE at any time

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



7. NICS Submitted to DODD

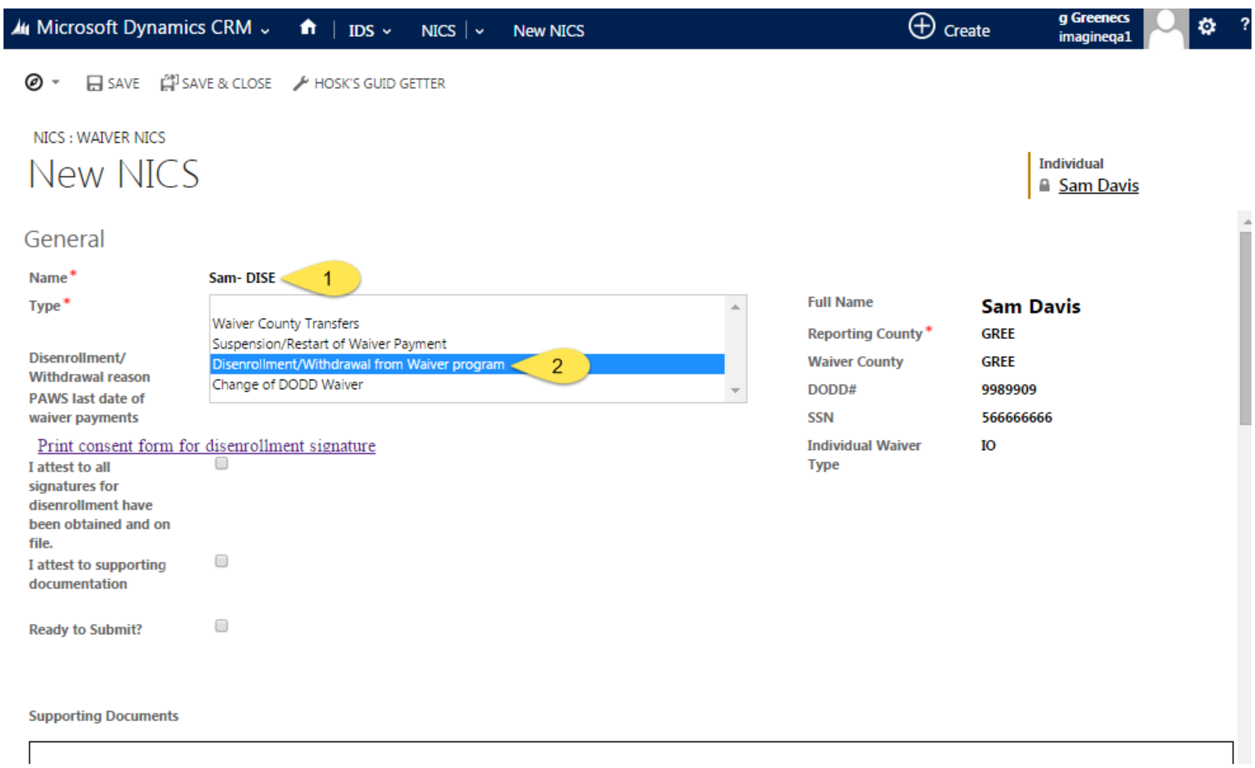


8. All fields on **NICS will be read only**; user will see the lock symbol next to all the fields and cannot edit anything now You **successfully submitted a Waiver NICS to DODD.**

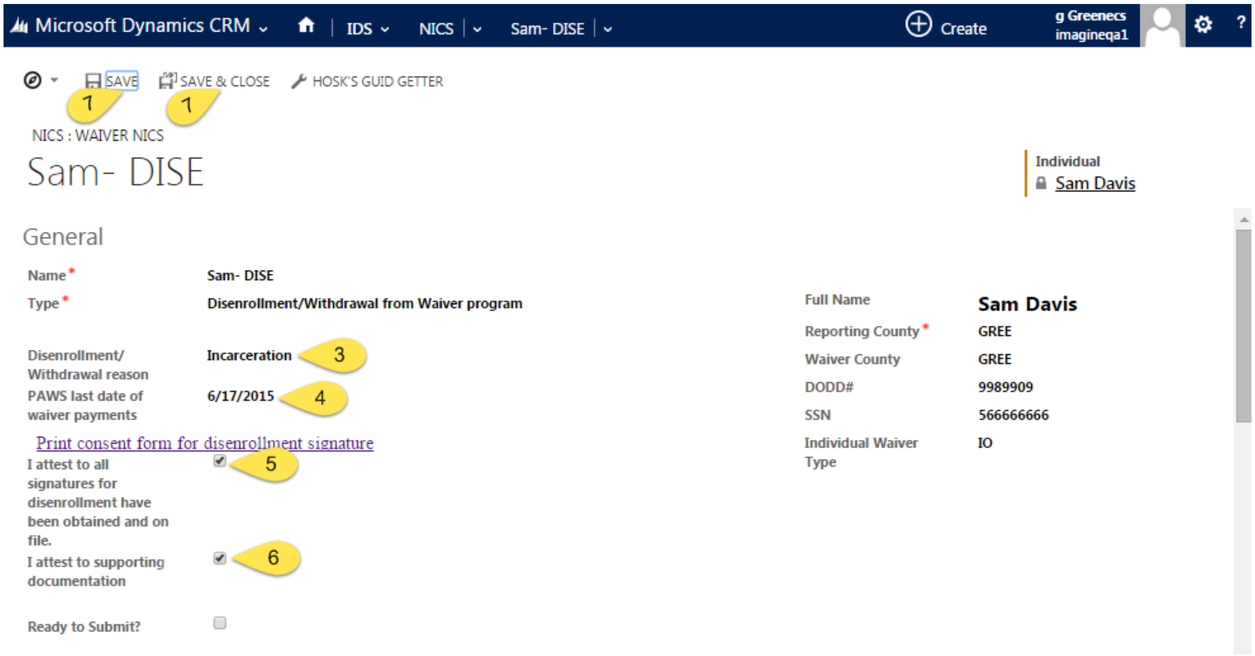
Disenrollment/Withdrawal Waiver Program NICS

1. **Add New NICS**

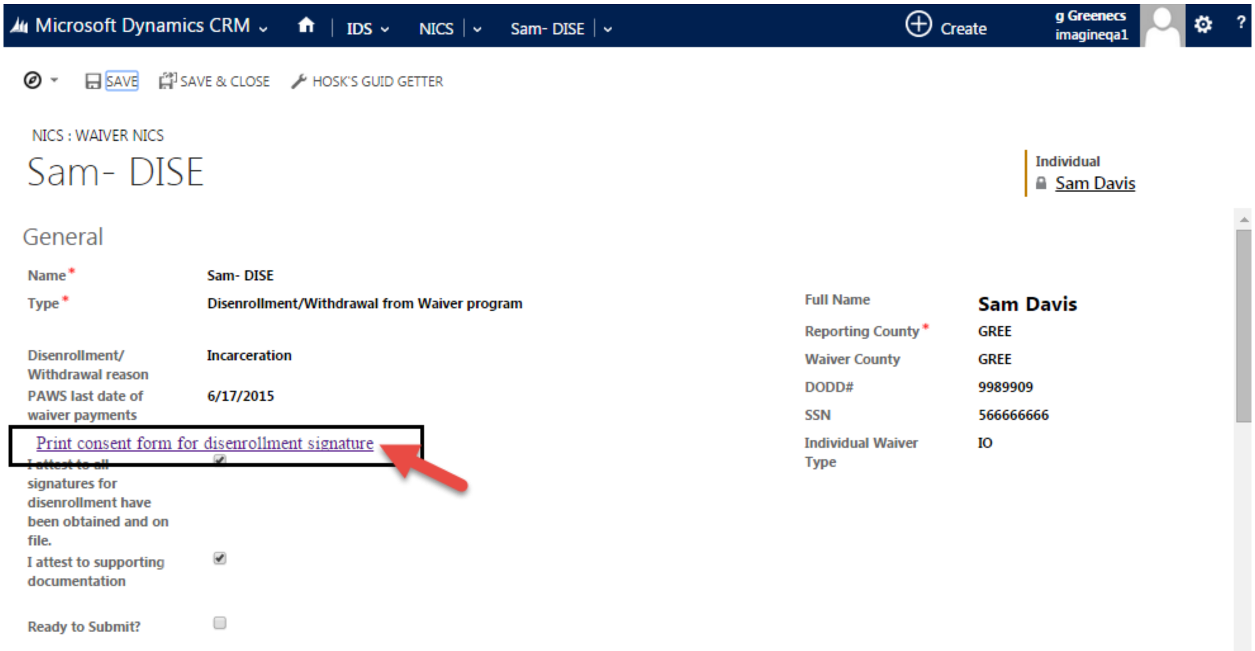
2. Add a Name for your NICS
3. **Select Type of NICS = Disenrollment/Withdrawal from Waiver Program**



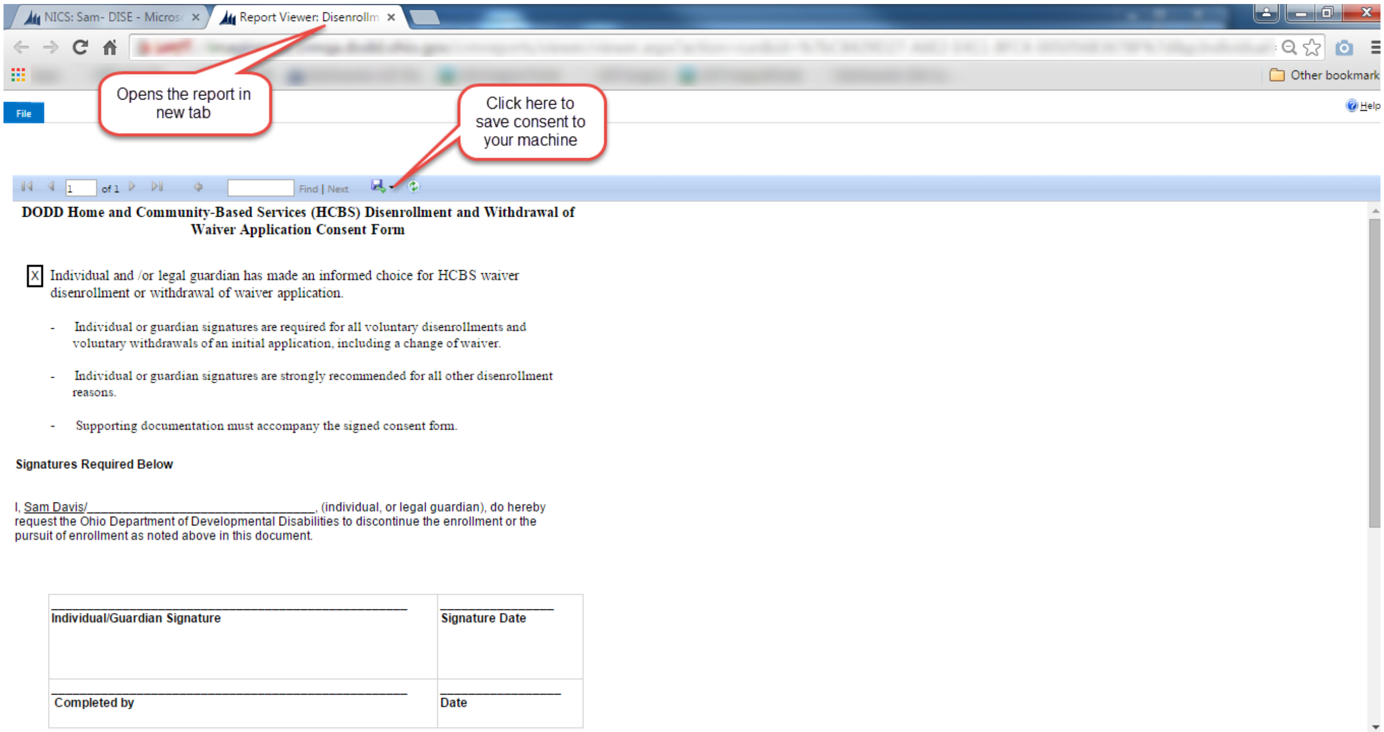
4. **Enter all Required Information**
5. Save at any time



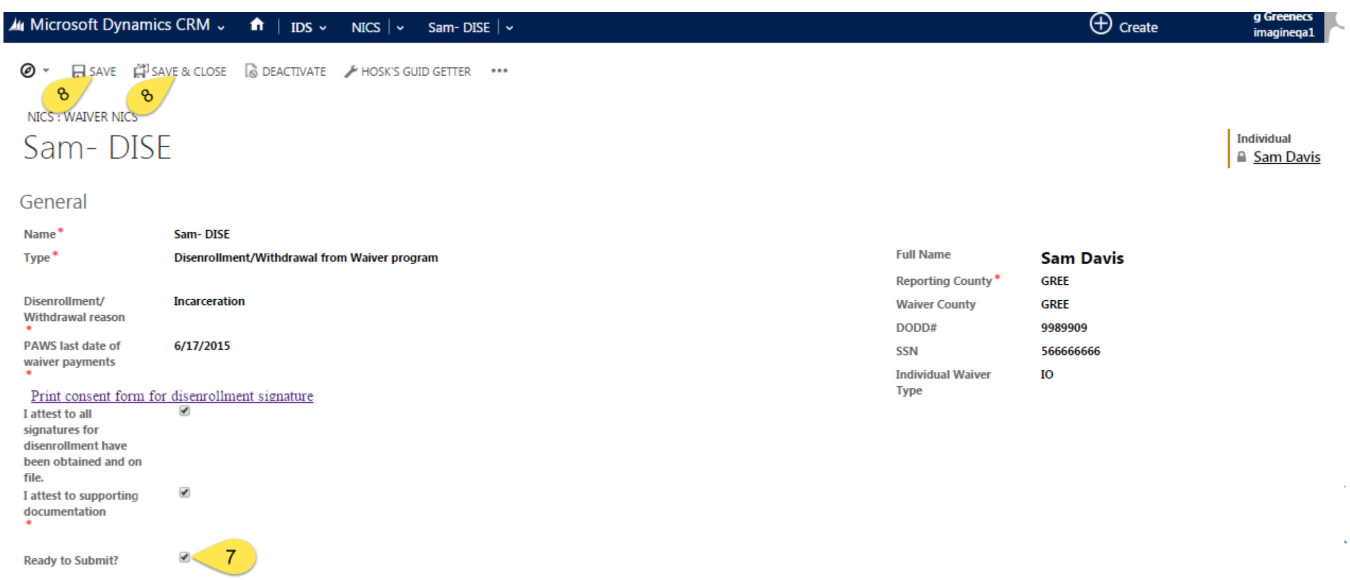
6. Click on the **"Print consent form for disenrollment signature" to open the consent form**



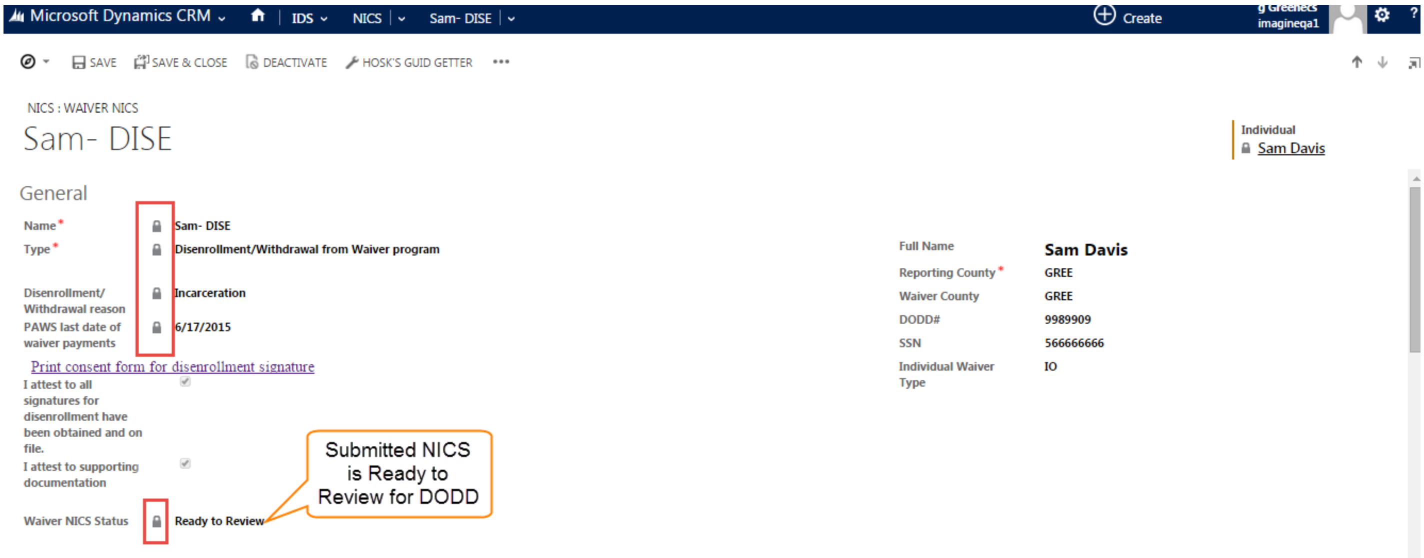
7. Print and fill the form



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



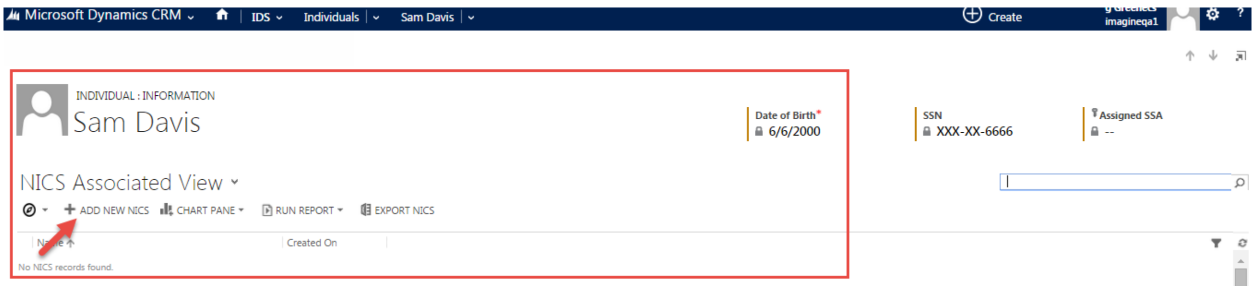
11. All fields on **NICS will be read only**; user will see the lock symbol next to all the fields and cannot edit anything now



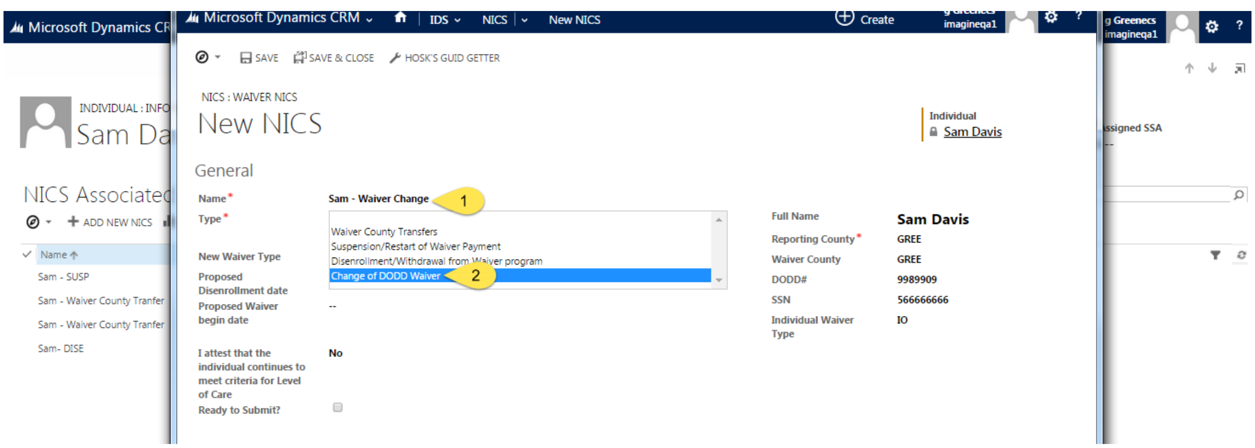
You **successfully submitted a Waiver NICS to DODD**

Change of DODD Waiver NICS

1. **Add New NICS**

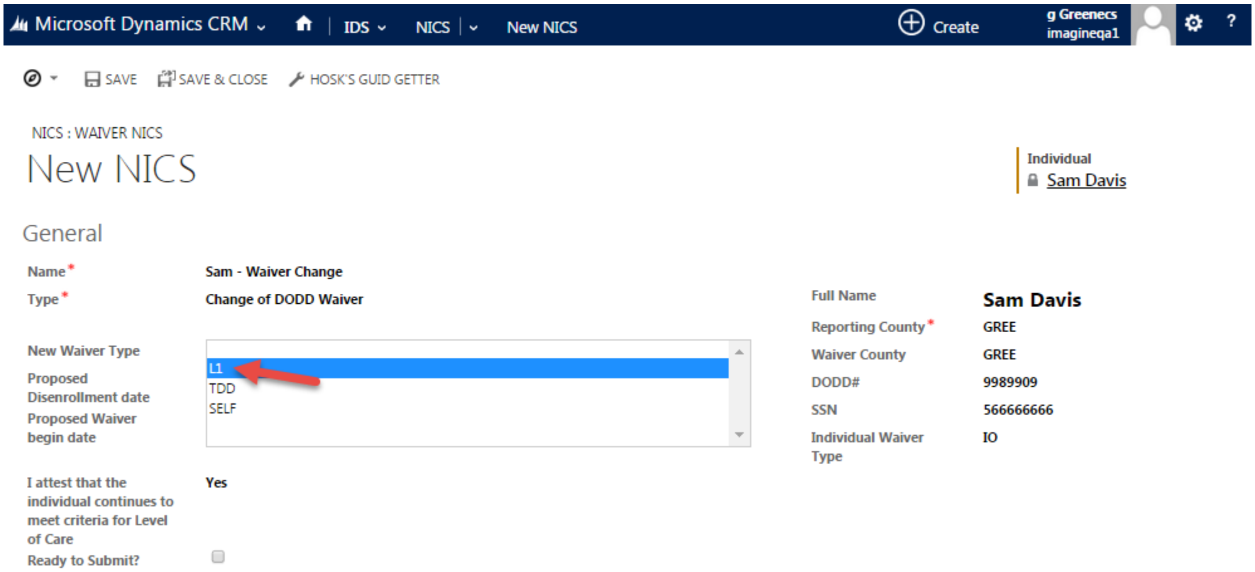


2. Add a Name for your NICS
3. **Select Type of NICS = Change of DODD Waiver NICS**

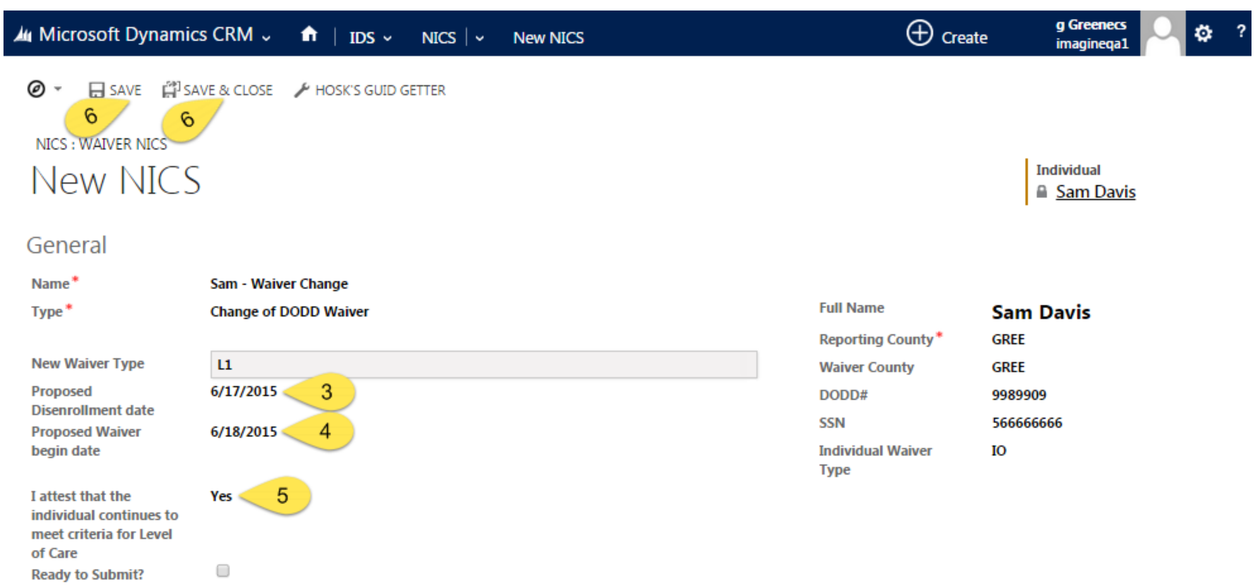


4. **Enter all Required Information**
5. Save at any time

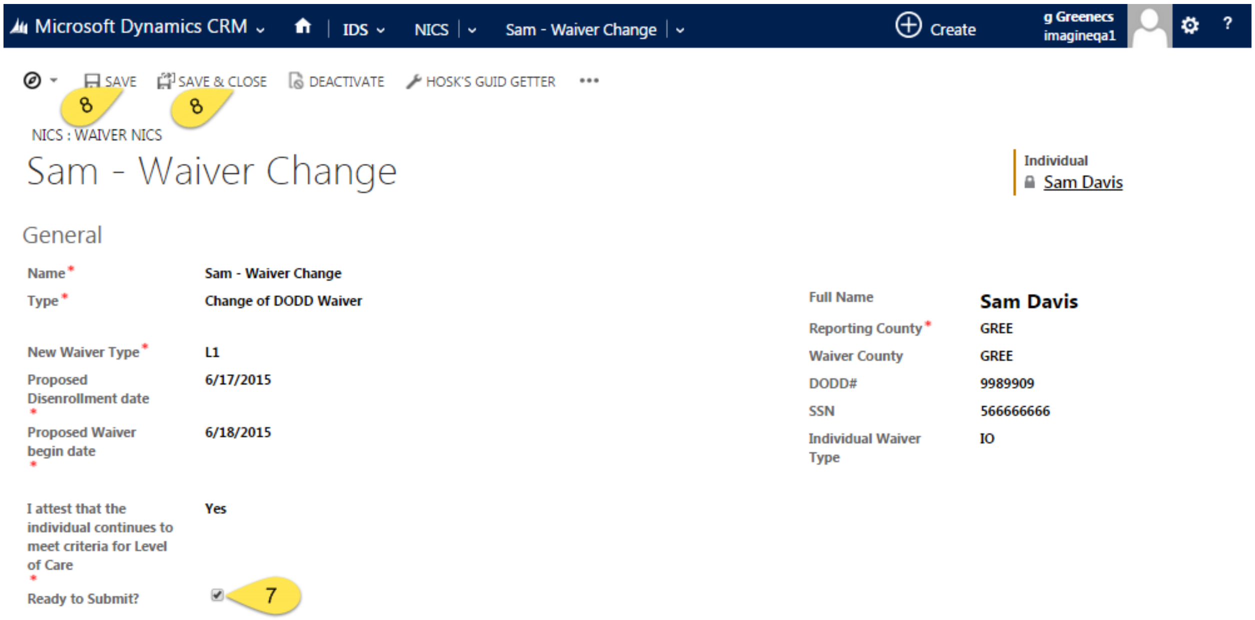
Select new waiver type



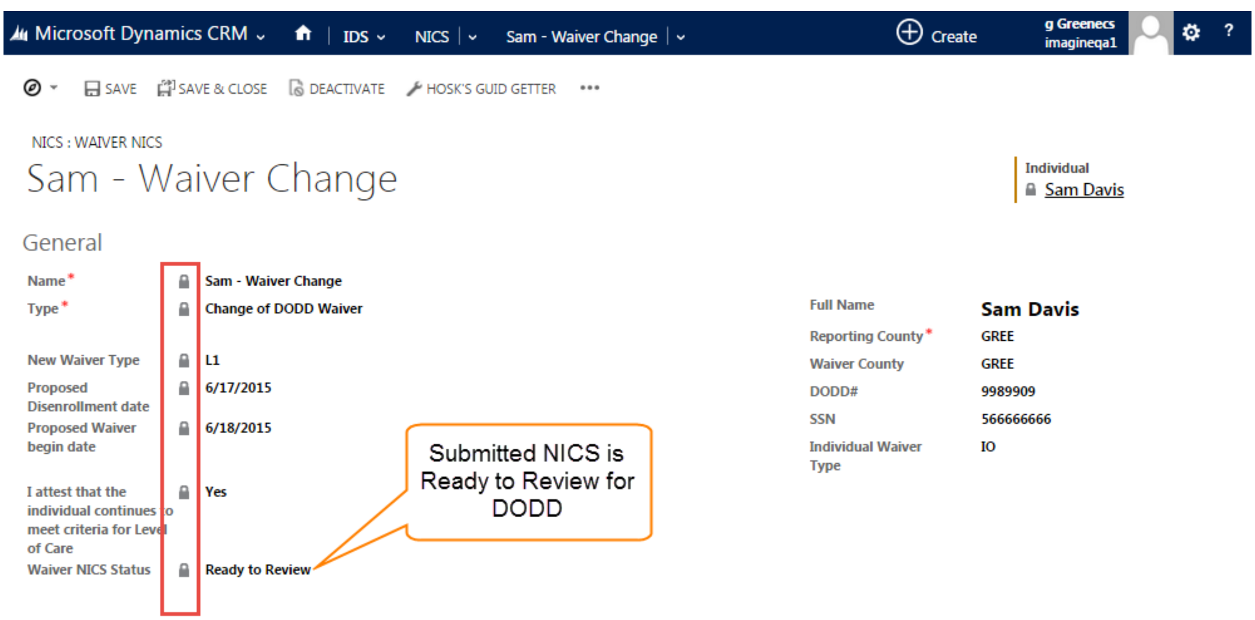
Enter other information



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

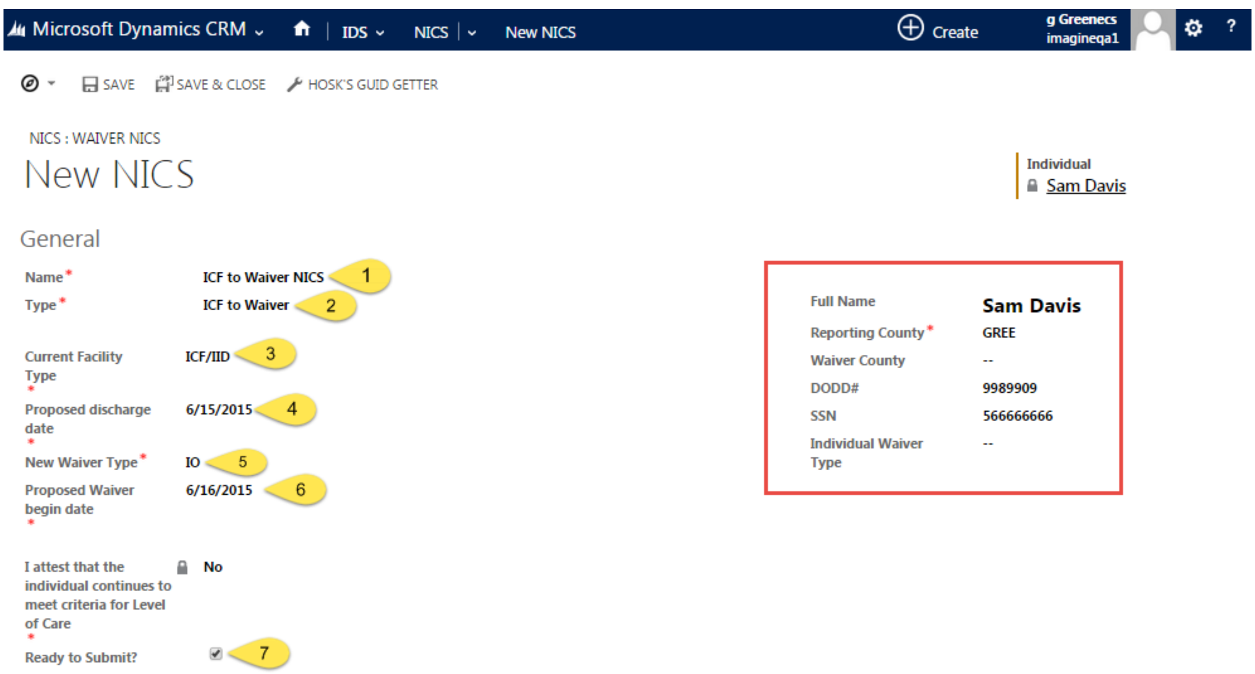


You **successfully submitted a Waiver NICS to DODD**

ICF to Waiver NICS

1. **Add New NICS**

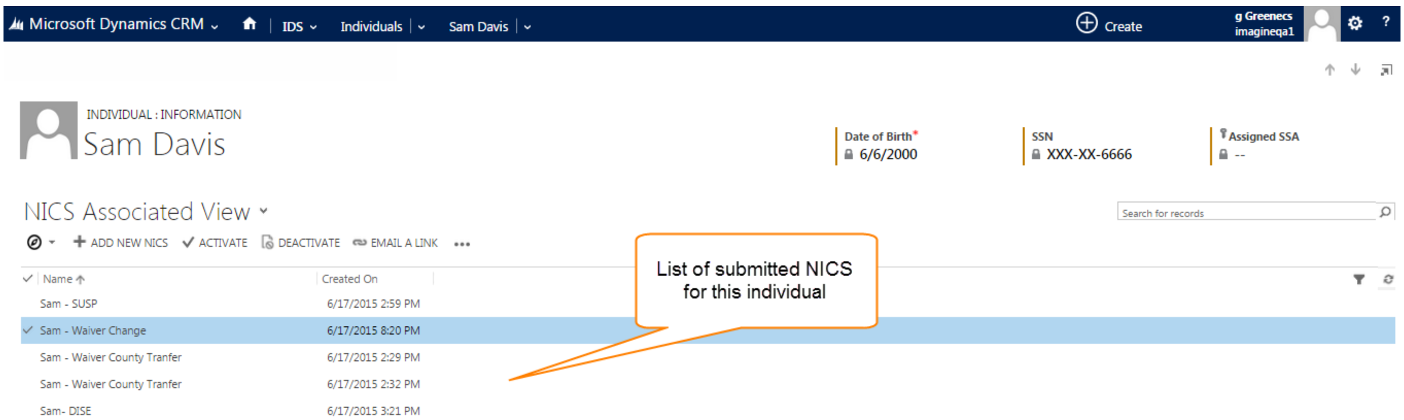
2. Add a Name for your NICS
3. **Select Type of NICS = ICF to Waiver**
4. **Enter all Required Information**
5. Save at any time



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

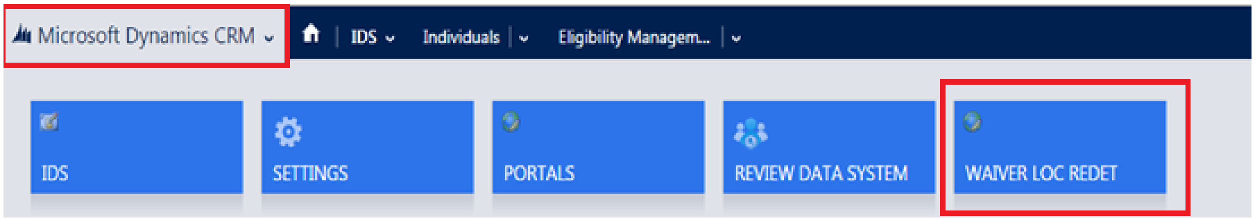
7. **NICS Submitted to DODD**
8. All fields on **NICS will be read only**; user will see the lock symbol next to all the fields and cannot edit anything now You **successfully submitted a Waiver NICS to DODD.**

Submitted NICS View

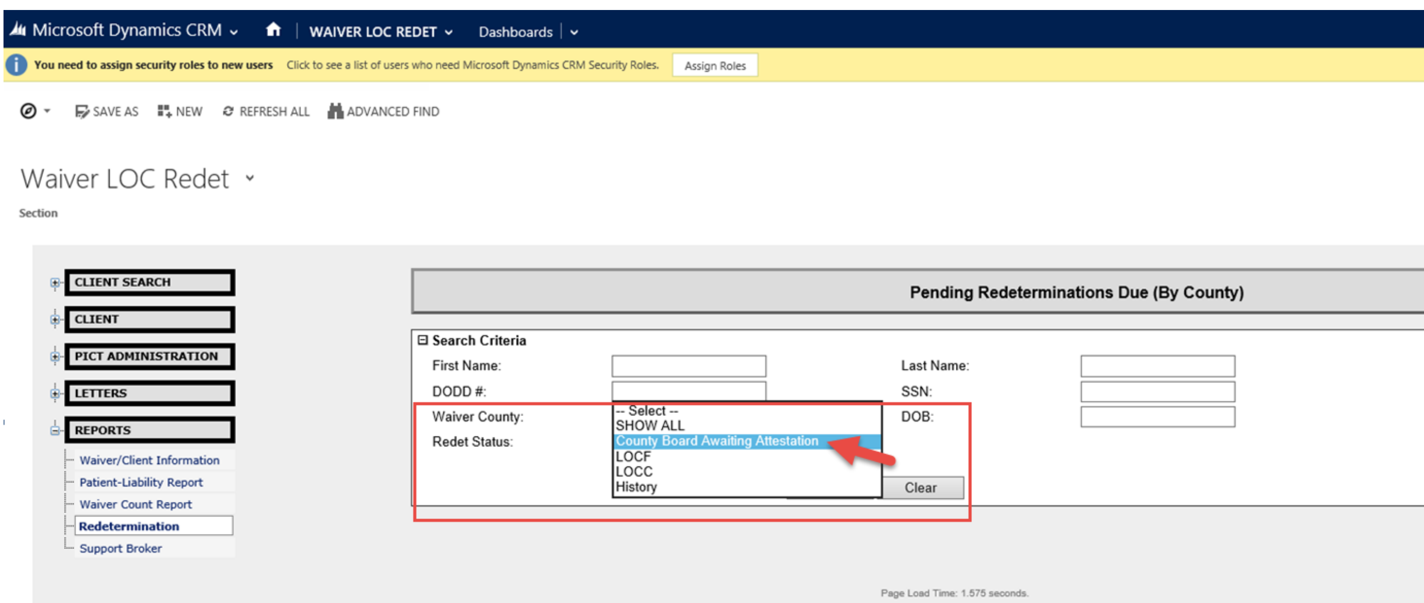


Waiver Redeterminations for LOC

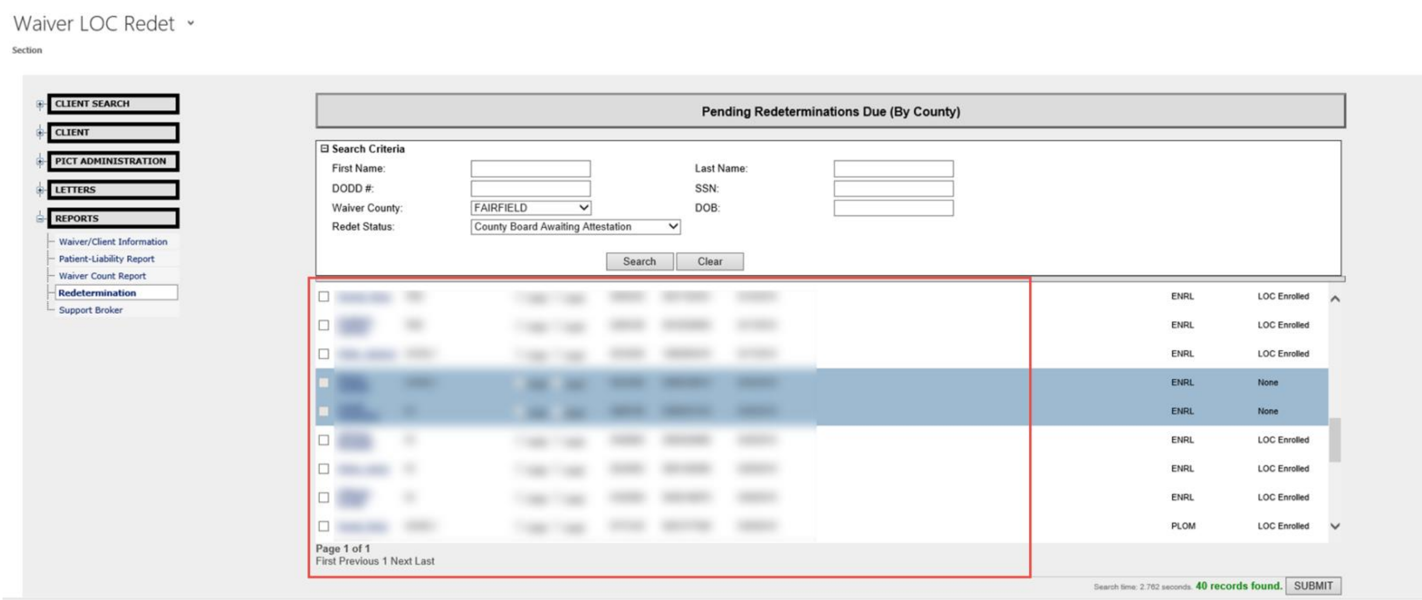
1. Select the Waiver LOC Redet Tile from the dropdown arrow next to Microsoft Dynamics CRM.



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



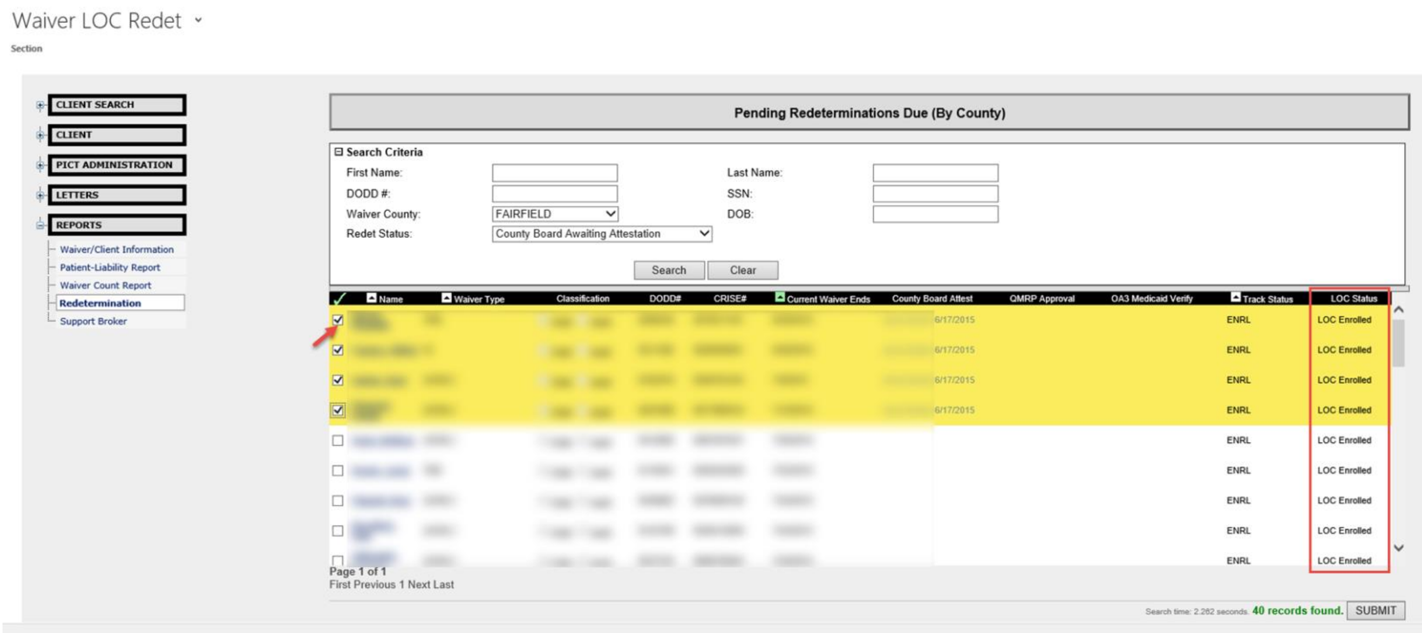
3. List of individuals whole redets are due will show up



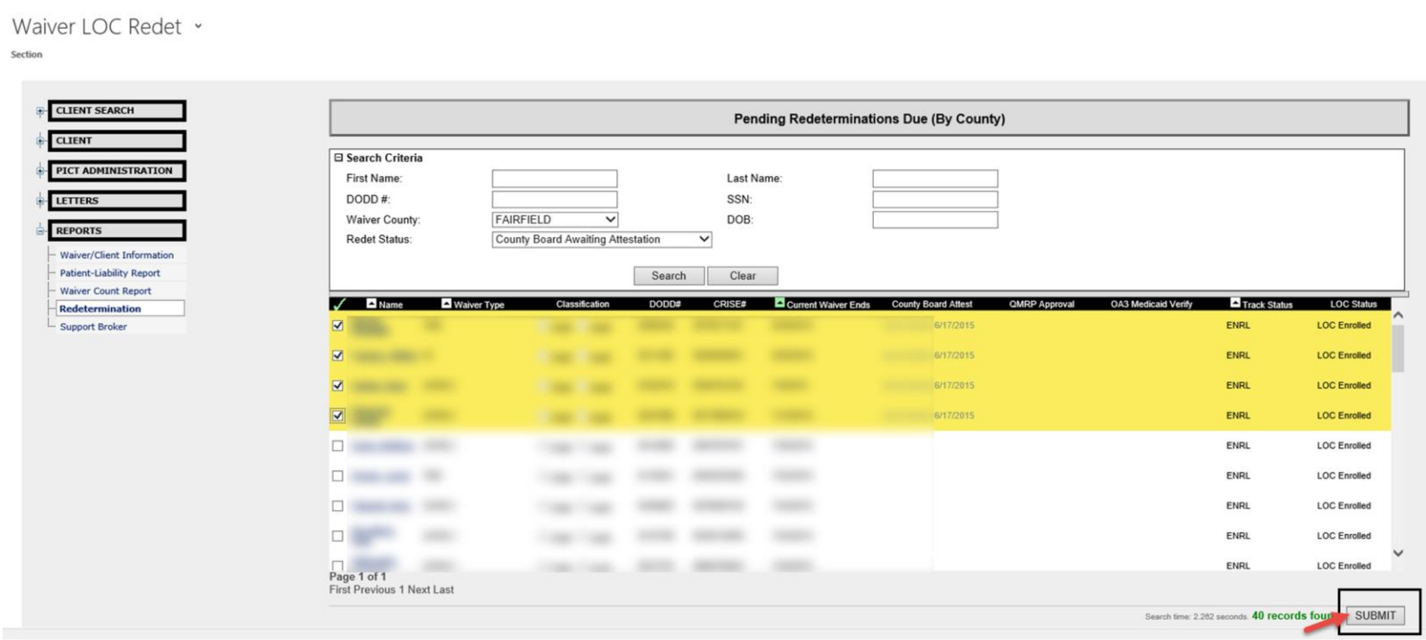
4. Check mark the box next to the Individual's name (same as current WMS Process) to select the redet you want to submit.

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.

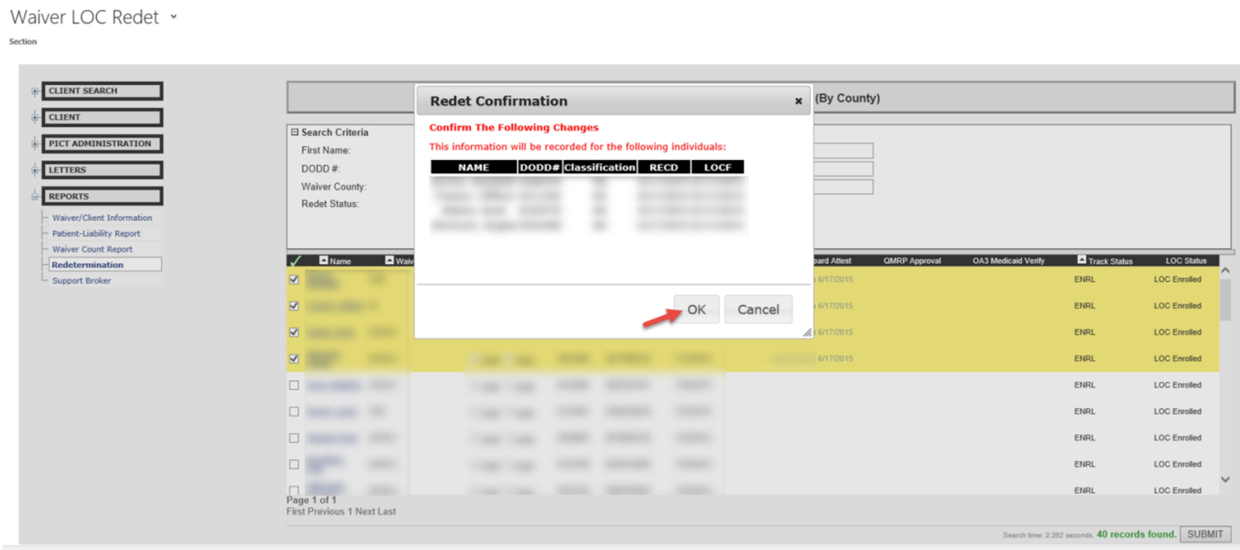
Note: If individual does not have a valid LOC in CRM, the LOC status will be "None" and user will not be able to select that individual to submit a redet. LOC status should be "LOC Enrolled" to submit a redet.



5. Click on Submit to submit redets



6. Click OK



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