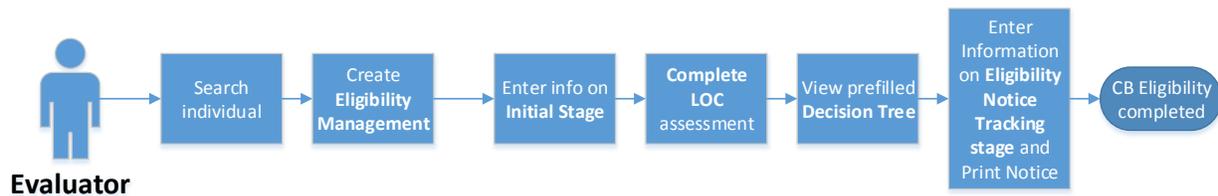


1

STEPS for Completing Level OF Care (LOC) for COUNTY BOARD ELIGIBILITY

ROLE: CB Evaluator



For **Opt In** counties – applies to 10 and above age individuals only

1. **Go to DODD portal login** as you usually do to access the DODD applications → Select **LOC/IDS**
2. You will see **Evaluator Dashboard**
3. To access list of individuals in your county → Select **Individual tile** from dropdown arrow next to IDS/IMAGINE
4. You will see list of **Active Individuals in your county**
5. **Search for individual** by typing name or DODD# in search box and hit enter or click on the magnifying glass next to search box
6. **Individual record will show up** if individual exist in your county
7. Double click on individual record to open individual's record and user will land on **Individual front page**
Eligibility Management Process – starts here



Department of
Developmental Disabilities

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

Division of Information Technology Services

STEPS for Completing Level OF Care (LOC) for COUNTY BOARD ELIGIBILITY

8. 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 here
10. Click on **+Add New Eligibility Management**
11. Enter required information on **Initial stage** to Save Eligibility management
 - I. **Assessment Reason** = select County Board Eligibility
 - II. **Assessment Type** = Initial
 - III. **Assessment Date** = can be todays or past date – it's when you are got this information from individual
 - IV. **Assign Eligibility Specialist** = click on the magnifying and select the eligibility specialist who will work with the individual
 - V. **Date of Visit** = can be todays or past date – it's when you met with individual to capture this information

LOC Assessment – starts here

12. Move to **LOC stage** → by clicking on the **“Next Stage”** and **Create+** on Next Stage
13. User will be now be on the LOC tool
14. 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

STEPS for Completing Level OF Care (LOC) for COUNTY BOARD ELIGIBILITY

15. **All fields on LOC are required** to complete LOC
16. Enter the **General information** on LOC
17. **Add informant** by clicking on the **+ sign** (this appears after save) on your right hand side → enter informant's name and relationship in the pop up that will appear
18. Evaluator will see **LOC questions as per Individual's Age of Assessment** (always 10 and above for county board eligibility)
19. **Answer all the questions** on LOC
20. Save LOC at any time → **LOC# is generated** on Save
21. **Complete LOC** by clicking on the **"Complete"** button; once all information on LOC is entered
22. Once LOC is Completed
 - I. **LOC becomes read only**; user will see the lock symbol next to all the fields and cannot edit anything now.
 - II. View **Score per Section** (major life area)
 - III. View **LOC Summary**
 - IV. View **LOC Total Score and LOC Eligible = YES/NO**
23. Move to **Decision Tree stage** → by clicking on the **"Next Stage"** and **Create+** on Next Stage
24. Enter the **Date of Determination** – can be today's or past date

STEPS for Completing Level OF Care (LOC) for COUNTY BOARD ELIGIBILITY

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

Adding Documents – starts here

26. Scroll down on Decision Tree Stage – you are looking for the **Documents Tab to Upload document** to SharePoint
- I. Click on **+new document**
 - II. Click on **chose file**
 - III. **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
 - IV. You will be back on previous screen → Click **OK**
 - V. Another pop up will appear → **Name of document** will be filled for you, enter **Title** and **Comments** if you like (not required)
 - VI. **Add Section** → Select “**LOC**” from the option set
 - VII. **Add Category** → Select the reason for what you are uploading the document → in this case it should = **LOC – County Board**
 - VIII. **Check Primary Verification** if this is a Primary Verification document
 - IX. Click **OK** – User will be back on Decision Tree Stage

STEPS for Completing Level OF Care (LOC) for COUNTY BOARD ELIGIBILITY

27. Move to **Eligibility Notice Tracking stage** → by clicking on the “**Next Stage**” and the center of the box
28. **Type of Notification** will auto populate per the result of the tool (**Eligible/Yes** on LOC Tool or **Ineligible/No** on the LOC Tool)
29. Enter **Date notification Sent** – date when you will send this notification to the individual. Not a required field
30. Fill in **To Whom it was Sent** by selecting the Individual’s name or individual’s parent or guardian’s name by clicking on the magnifying glass
31. Enter **mailing address** for the individual
Enter contact information of county board staff
32. **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.
33. Enter **Customer Guide’s contact information**
Print Eligible/Ineligible Notice – starts here
34. Open the **Eligible/Ineligible Notice** by clicking on the link under the Eligibility/Ineligibility Letter Tab
35. **Eligible/Ineligible Notice** will open in a new tab
36. Right click on your mouse and select print to **Print the Notice**

