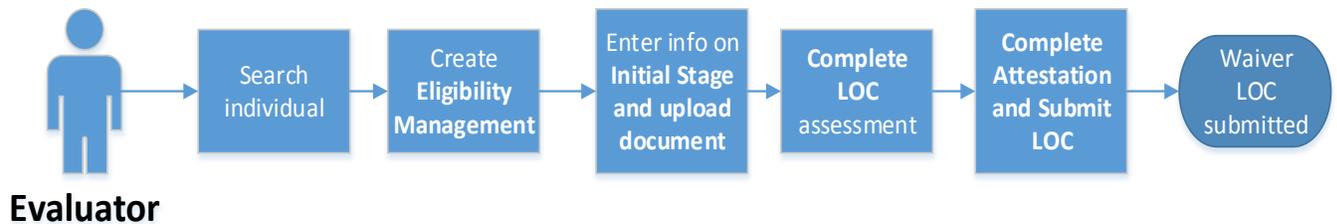


1

STEPS for COMPLETING and SUBMITTING Level OF Care (LOC) for WAIVER ELIGIBILITY

ROLE: CB Evaluator



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



Department of
Developmental Disabilities

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

Division of Information Technology Services

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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 Waiver
 - II. **Assessment Type** = Initial
 - III. **Assessment Date** = can be today's or past date – it's the date when you got this information from individual
 - IV. **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

Adding Documents – starts here

12. Scroll down on Initial Stage – you are looking for the **Documents Tab to Upload document** to SharePoint
 - I. Click on **+new document**
 - II. Click on **choose 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**

STEPS for COMPLETING and SUBMITTING Level OF Care (LOC) for WAIVER ELIGIBILITY

- 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 –Waiver**
 - VIII. **Check Primary Verification** if this is a Primary Verification document
 - IX. Click **OK** – User will be back on Initial Stage
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
- LOC Assessment – starts here**
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. **Add informant** by clicking on the **+ sign** (this appears after save) on your right hand side → enter informant's name and relationship with individual in the pop up that will appear
20. Evaluator will see **LOC questions as per Individual's Age of Assessment** (9 and below or 10 and above)
21. **Answer all the questions** on LOC
22. Save LOC at any time → **LOC# is generated** on Save
23. **Complete LOC** by clicking on the **"Complete"** button; once all information on LOC is entered
24. 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**
25. **Complete Attestation** – 2399 and PICT by clicking on the attestation record at the bottom of the LOC stage, under the Attestation Tab
26. **Attestation will open in a new window** → check mark both PICT and 2399 → Click on Save and Close
27. Submit LOC by clicking on the **Submit Button** available on top of the LOC

