Department of Developmental Disabilities

Information Technology Services

OhioITMS

DODD Ohio Incident Tracking and Monitoring System

External - User Guide

October 2, 2024

Department of Developmental Disabilities
Division of Information Technology Services
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Columbus, Ohio 43215

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Introduction

The Ohio Incident Tracking and Monitoring, or OhioITMS, is a tool used by the Ohio Department of Developmental Disabilities (DODD) to track Major Unusual Incidents (MUI) and related information. This user guide is for external staff who need to enter a new MUI, view or edit previously created MUI records, perform user management, or search the Abuser Registry.

Terminology

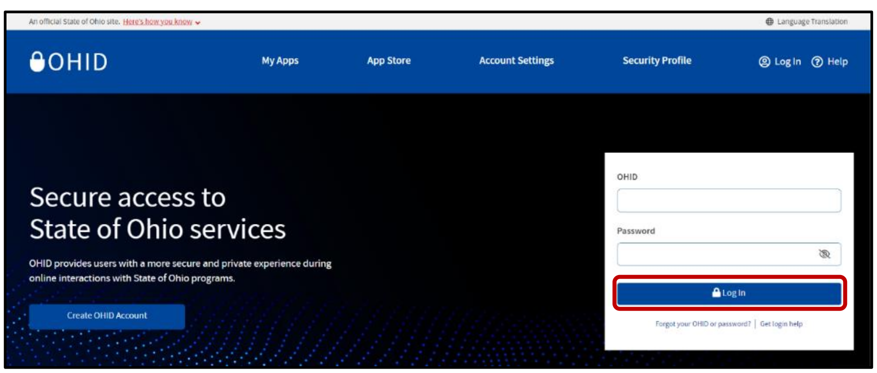
When we say	We mean this
Record	An item you are tracking in your database; if your data is like a spreadsheet, then a record is a row on the spreadsheet
Field	A place where you store a value, like a name or address; using our spreadsheet example, a field would be a column on the spreadsheet
Object	A table in the database; in that spreadsheet example, an object is a tab on the spreadsheet
Org	Short for "organization," the place where all your data, configuration, and customization live. You log in to access it. You might also hear this called "your instance of Salesforce"
App	A set of fields, Objects, permissions, and functionality to support a business process
Related List	Objects can be associated with (related to) each other. For example, an Account may have Contacts associated to it. Related Lists allow you to see the relationships established between the Objects.
List View	A collection of records within an object displayed in a list format and customized with filters

Accessing the Application

To access the OhioITMS application, you must have a valid OHID User ID and be an authorized user of the Ohio Department of Administrative Services (DAS) and DODD services.

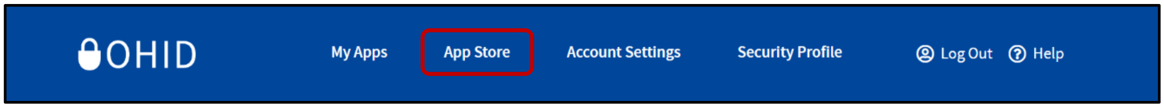
First time users

1. To begin, go to the OHID Portal at ohid.ohio.gov, log in with your OHID User ID and Password, and click **Log In**.



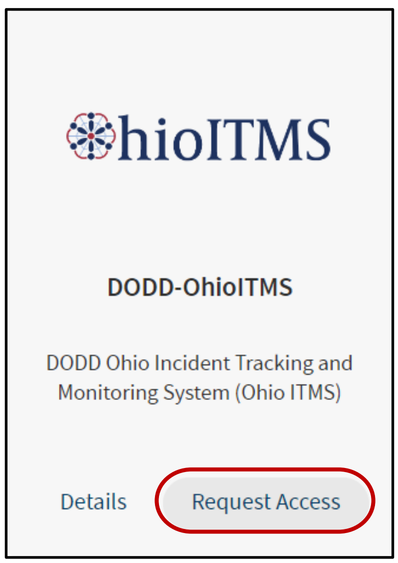
If you do not have an OHID User ID, please refer to the OHID User ID Creation Guide for help.

2. Once logged in, click the **APP STORE** tab.

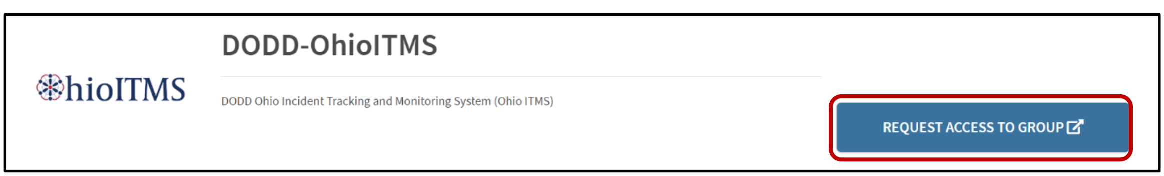


3. Type "**DODD**" into the search box and hit **Enter** or click the **Seach Button** (🔍).

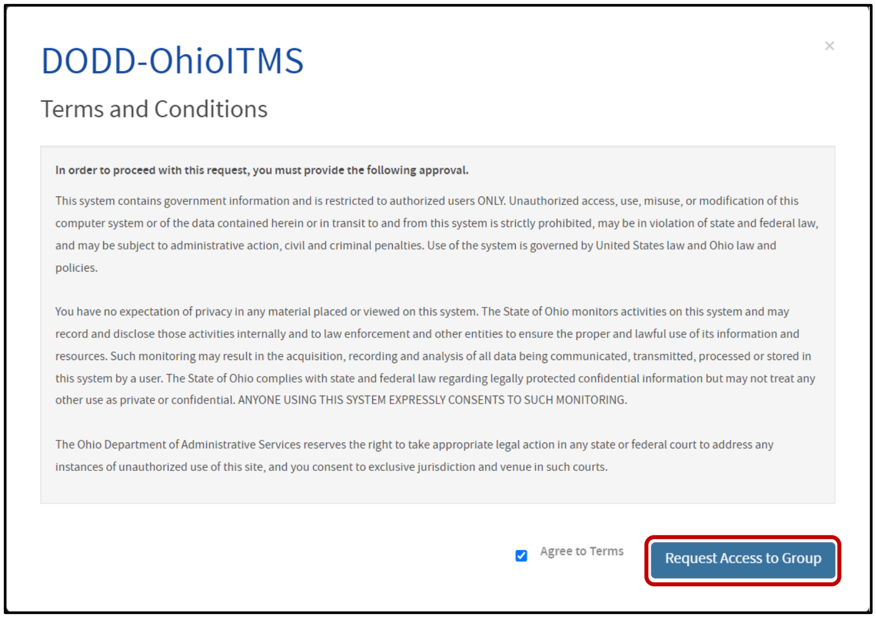
4. Find the **DODD-OhioITMS** tile and click **Request Access**.



5. Click **Request Access to Group**.



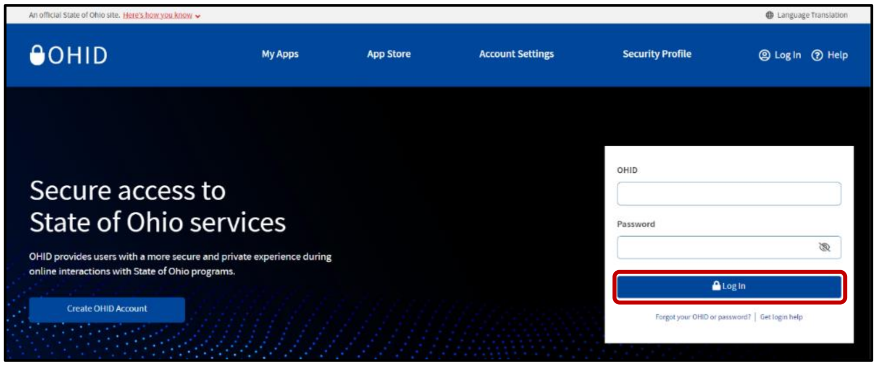
6. A popup will appear. Check the box next to **Agree to Terms** and click **Request Access to Group**.



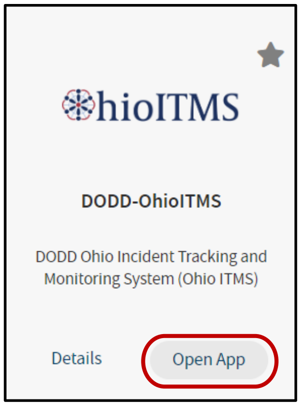
Although access is usually instantaneous, it can sometimes take a little while. Once your request is submitted, you will be notified by email when your request has been processed. **Do not** resubmit your request until you have been notified of the results. Once notified, return to ohid.ohio.gov and log back in again. Go to **MY APPS** and click **Open App** in the **DODD-OhioITMS** tile to continue.

Returning Users

1. To begin, go to the OHID Portal at ohid.ohio.gov, log in with your OHID User ID and Password, and click **Log In**.

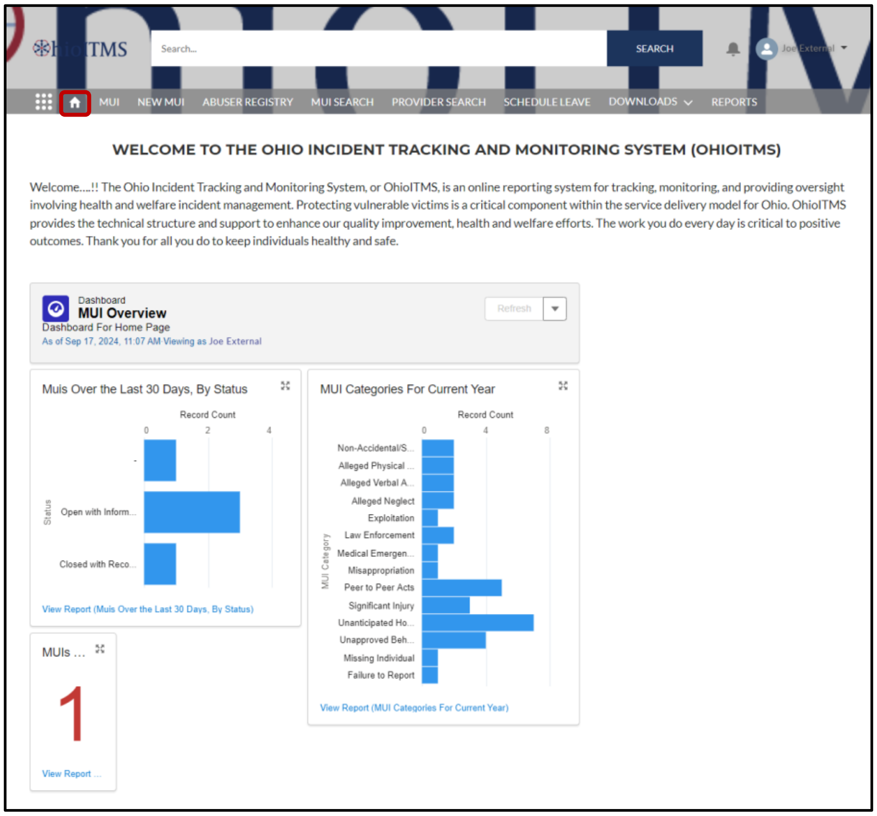


2. On the My Apps locate the **DODD-OhioITMS** tile and click **Open App**.



Home Page

The homepage is where you will find your dashboards and other relevant information. You will also see a navigation bar at the top of the page to help you move through the system. You can always return to this page by clicking the **Home** button in the navigation bar.

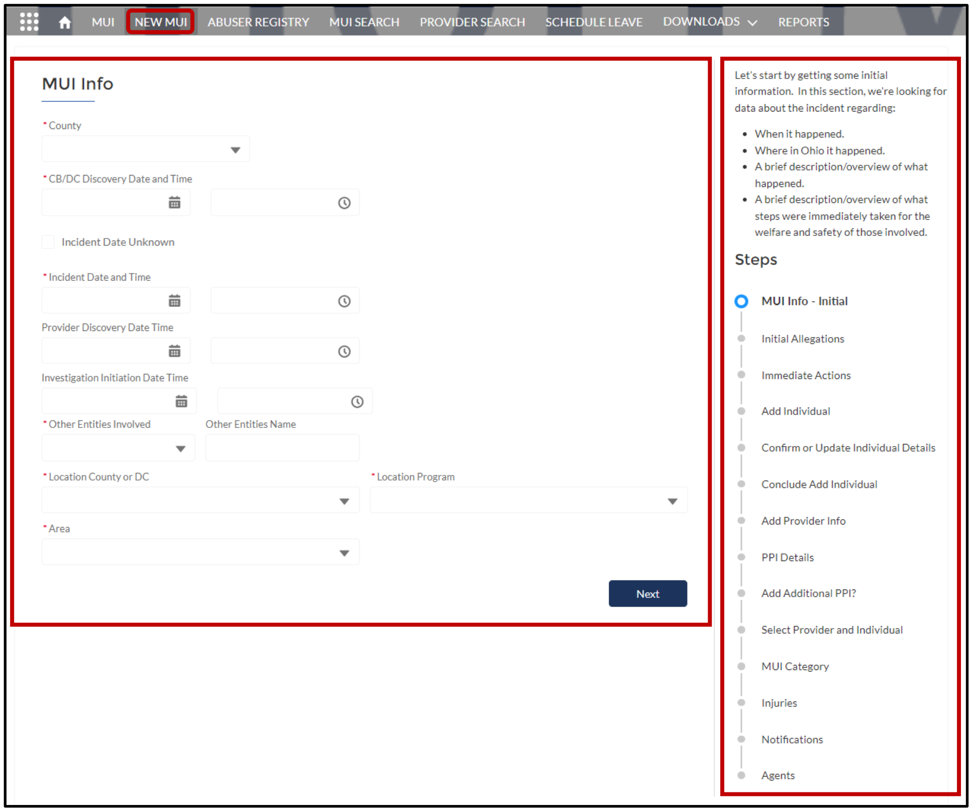


If you are a supervisor or admin, you will have an additional tab in the navigation bar labeled **Admin**. The **User Management** section of this guide will have more information on the **Admin** tab.

Enter a New MUI

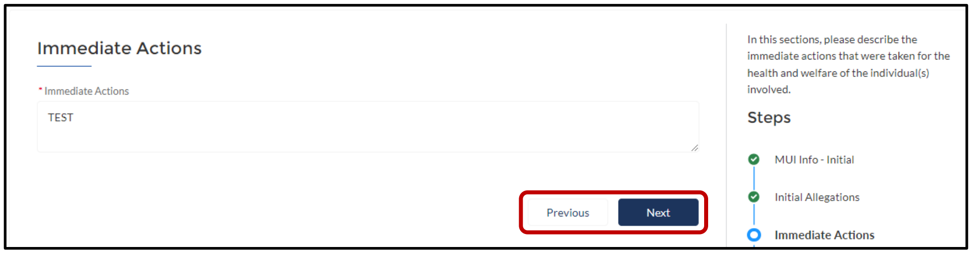
Some users will be able to create a new MUI in the OhioITMS system. Users should have the following information ready before starting the new MUI process: people associated with the incident, Primary Person Involved (PPI), Provider(s), Entities, and dates/times of the incident.

1. When you are logged into the OhioITMS system, click the **New MUI** tab in the navigation bar at the top of the screen. You will fill out the **MUI Info** section including all required fields denoted with a red asterisk (*). You will also notice a **guide** on the right that will provide guidance and mark sections complete as you make your way through the MUI. Click **Next** at the bottom of each section when done with that step.

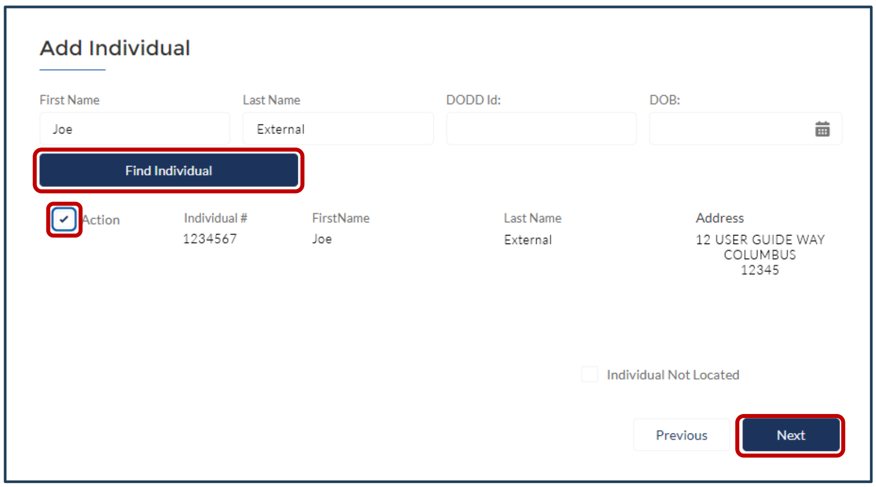


If you fail to fill out a required field an error will appear and you will not be able to move on to the next step of the process.

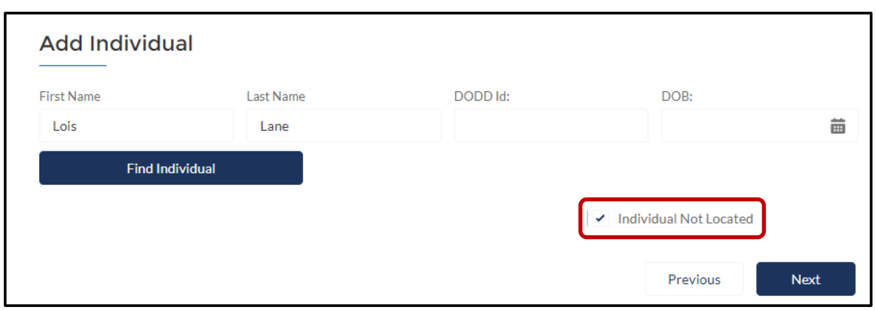
2. As you make your way through the new MUI process you will be able to navigate between steps using the **Previous** and **Next** buttons found at the bottom of each section.



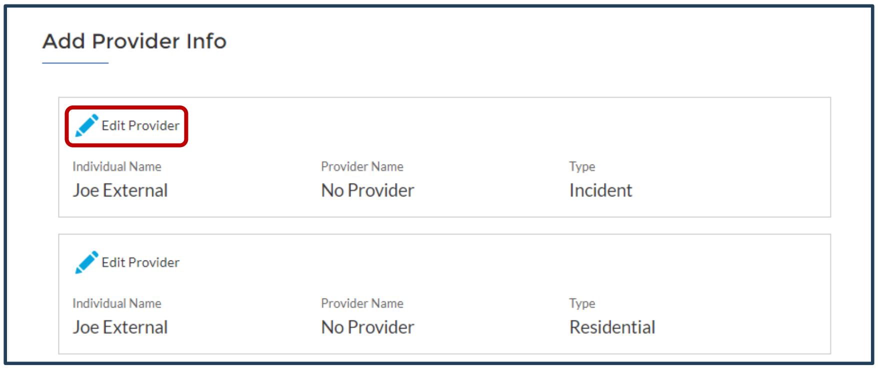
3. When you get to the **Add Individual** step, search for a person by entering in as much information as possible then click **Find Individual**. The results will populate below. **Click** the box to the left of the person's name you want to add then click **Next**.



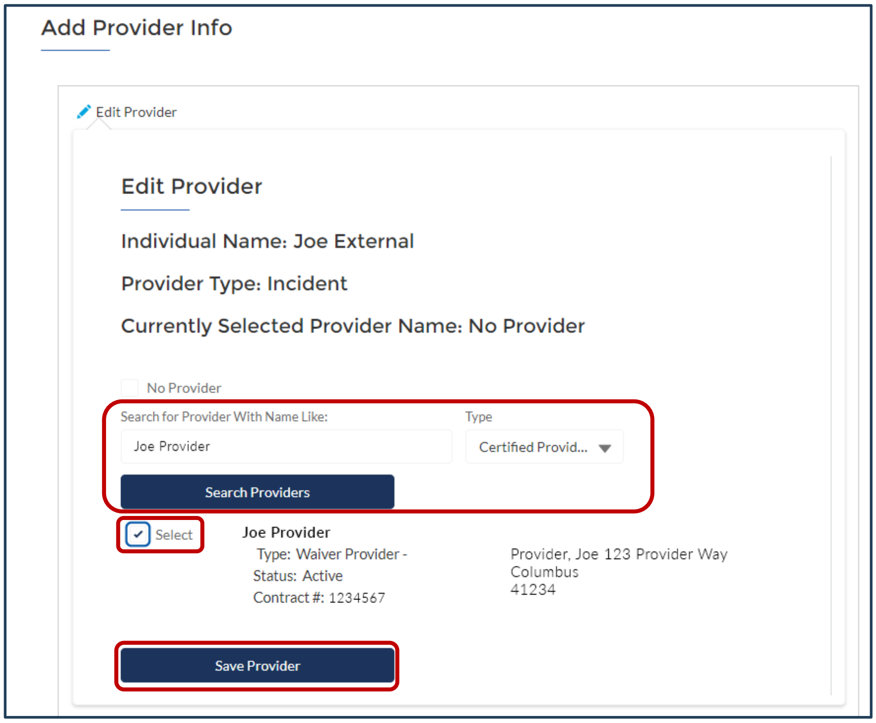
If your search doesn't return any results you can click the box next to **Individual Not Located** and it will allow you to provide the person's information in the next step.



4. Once you have added your individual(s) the next step will be to **Add Provider Info**. Here you can click **Edit Provider** for any individual(s) that were added.



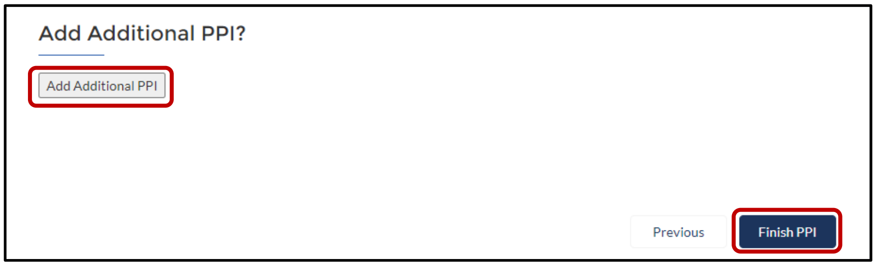
5. Fill out the field for **Search for Provider With Name Like** and select **Type** (search results will not populate without the provider type). Click the **box** next to **Select** to choose that provider. Click **Save Provider**.



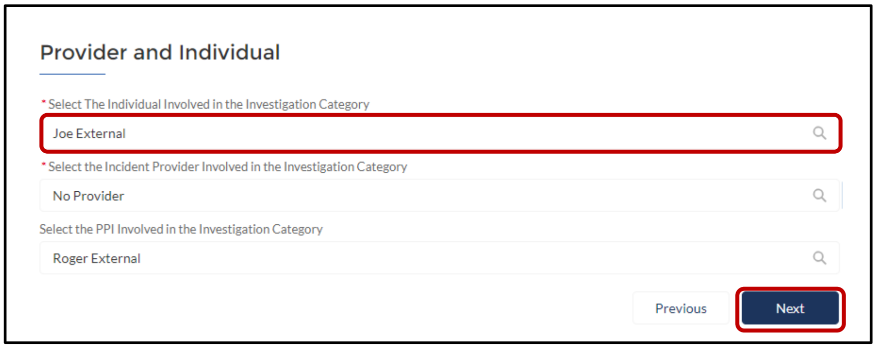
Once you save your provider, the Provider Name may not update and still say No Provider. As long as you completed the step above the provider has been saved and can be used for steps later in the process. Do not refresh the page. Click **Next** when provider(s) have been added.

6. If applicable, fill out the **PPI Details** form. Once the form is filled out make sure to click **Save PPI**. There will be no confirmation, but the information is saved. Click **Next** when finished.

7. You can add more PPIs by clicking **Add Additional PPI** or click **Finish PPI** to continue.

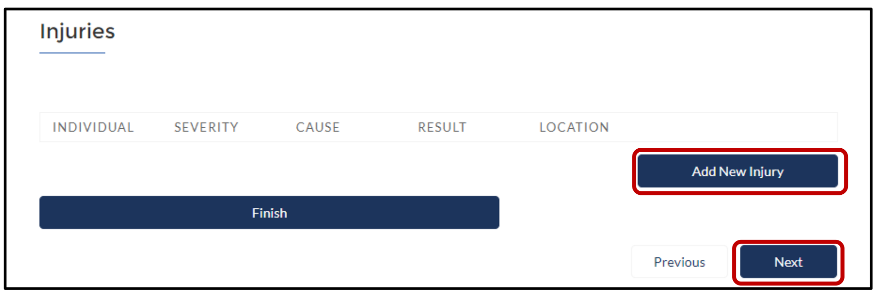


8. You will now select the **Provider and Individual**. Click the **fields** below each statement to reveal a list of all the Individuals/Providers you have submitted up to this point. If the person you are looking for is not in the dropdown list, you will need to go back and add them. Click **Next**.

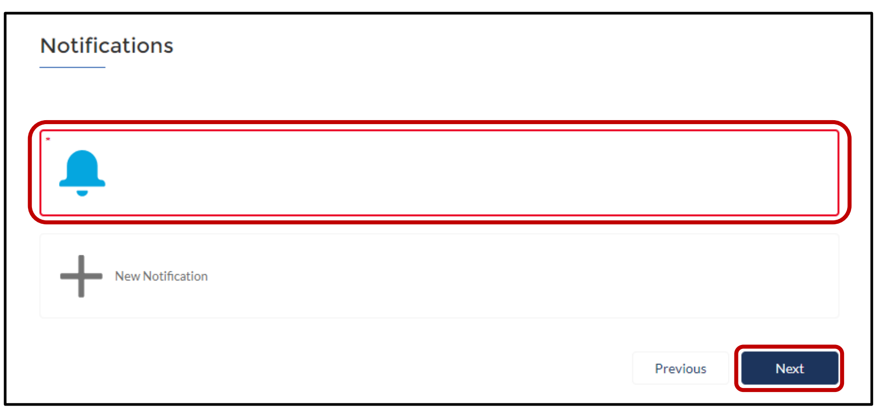


9. Choose an **MUI Category** from the dropdown menu. The form will populate based off your selection. Fill out as many fields as you can. Click **Next**.

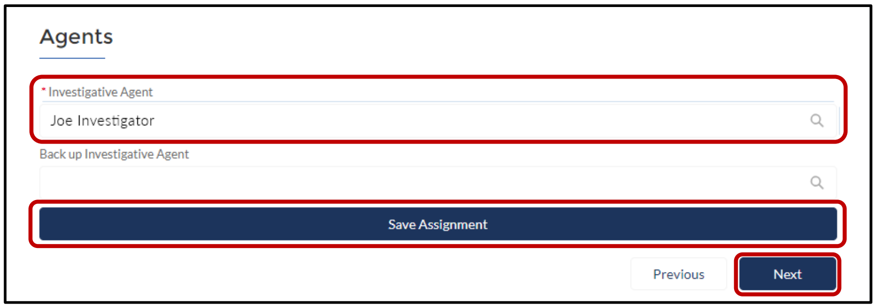
10. You will be able to document all injuries that occurred during the MUI. Click **Add New Injury**. Fill out the associated form and save. Click **Next** when all injuries have been documented.



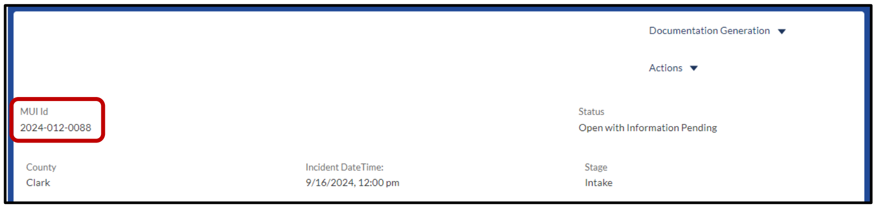
11. You will need to add a notification. Click anywhere in the **red box** with the blue bell. You will document the date and time of each notification made because of the incident. This step requires at least one notification. Click **Next**.



12. You will now select the **Investigative Agent**. Click on the field and a list of names will appear to choose from. If the agent is someone other than yourself, you will be named as the "MUI Contact" on the record. Make sure to click **Save Assignment** before clicking **Next**.



13. You will be redirected to the new MUI. Make sure to take note of the **MUI ID** so you can find it in the future.

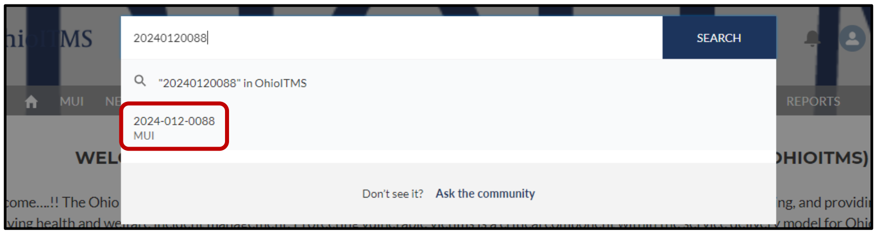


View an MUI

Once you have created an MUI you can open it to review, add information, or make changes.

Global Search

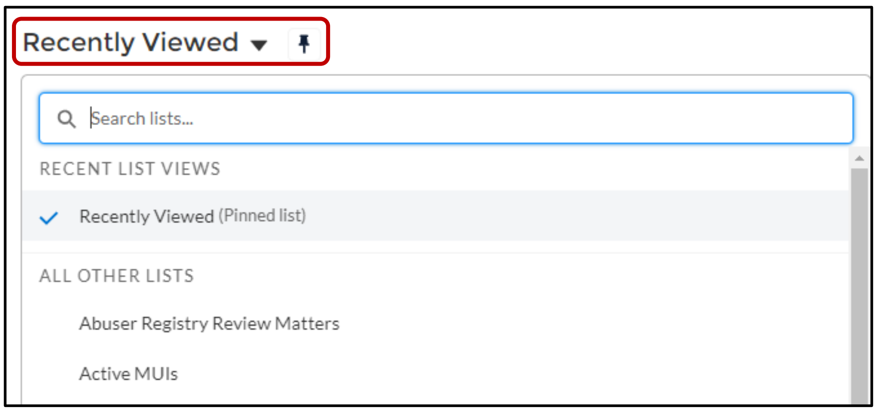
The first way to find an MUI is to type the ID number into the global search bar at the top of the page. MUI ID numbers have dashes in them but are not required for the search function. Do NOT click the search button. It will not return the desired results. Instead, select from one of the results populated in the list below the global search.



List Searches

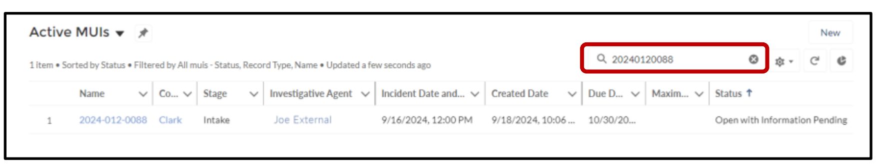
1. Click on **MUI** in the main navigation bar. This will take you to searchable lists.

2. The list view will default to **Recently Viewed**. You can change the list by clicking the **dropdown arrow** to the right of the list title. There will be multiple options. Choose the list the list that best describes the MUI you are searching for to get the best results. Active MUIs or Closed MUIs are good lists to start with depending on the MUI status.



You can click the pin icon ( ) to set a new default list view based on your needs.

3. Use the **search box** located in the top right of the page and hit **Enter** on your keyboard. Some information is not searchable. It is recommended to use the MUI ID number.



Edit an MUI

This section will provide guidance on how to edit different sections of the MUI.

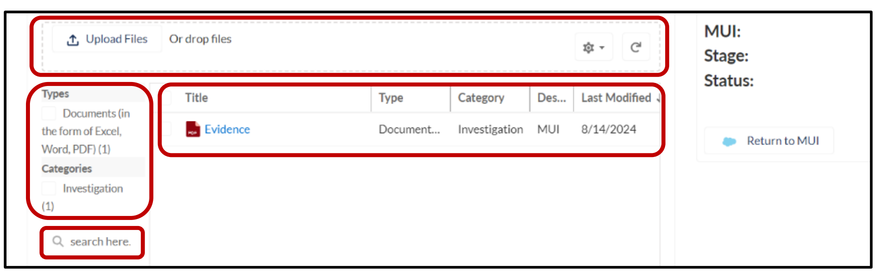
Adding Evidence

1. Click the **MUI** tab in the navigation bar.

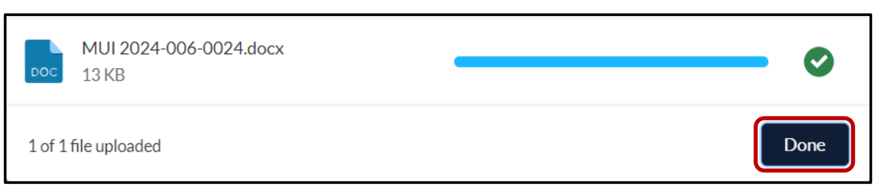
2. Locate and click the **MUI Record** (blue numbers in the "Name" column) you want to upload documentation to. If you don't see the MUI in the default list, you can change the list by using the **dropdown arrow** to the right of the list title or use the search bar at the top of the page.

3. Once the MUI is open, click on the **Evidence button** in the top right corner.

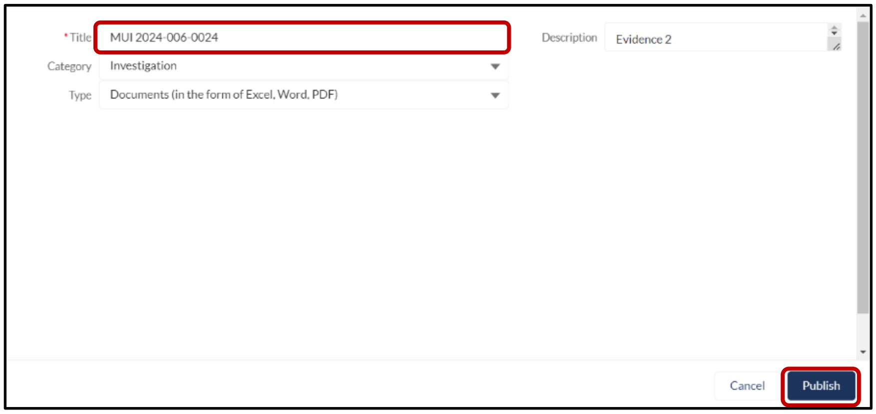
4. You will see a few different sections on this page. At the top you will find the **Upload Files** button and **drop files** area. When dragging and dropping files, make sure to do so over the **Upload files** or **drop files** text. You can upload multiple files at one time. On the left side, you can see the types of files uploaded and their categories. There is also a directory of uploaded documents available. If you don't see a document, you can expand the list by clicking **View All** in the bottom right of that section or use the **Search Bar** on the left.



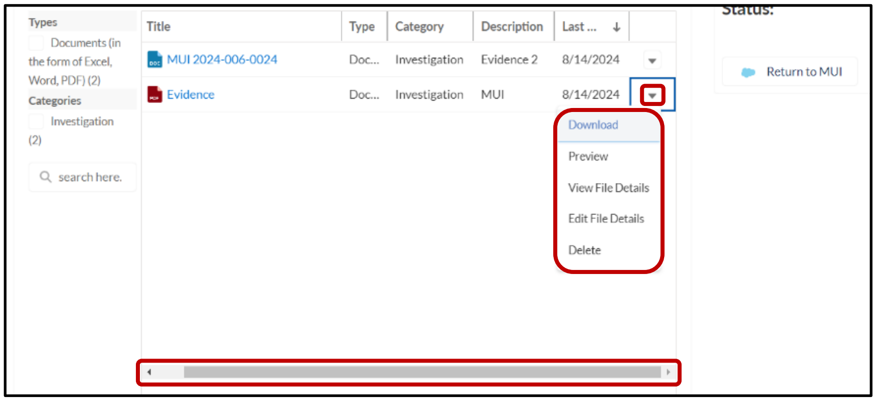
5. When you upload files, a popup will appear showing the progress. When complete, click **Done**.



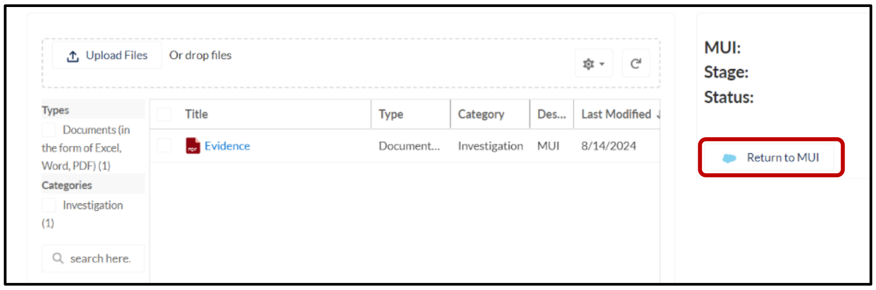
6. The next field will allow you to add details to the file(s). The full **MUI number** should be placed in the **Title** field. Click **Publish** when finished.



Note: There is a **dropdown arrow** to the far right of each file. You may need to use the **scroll bar** at the bottom of the section to see it. The **dropdown menu** will give you multiple actions for that file.



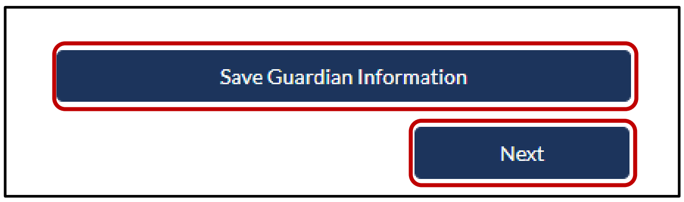
7. Once all files are added, you can navigate away from the page or click the **Return to MUI** button on the right side of the screen.



Add Guardians

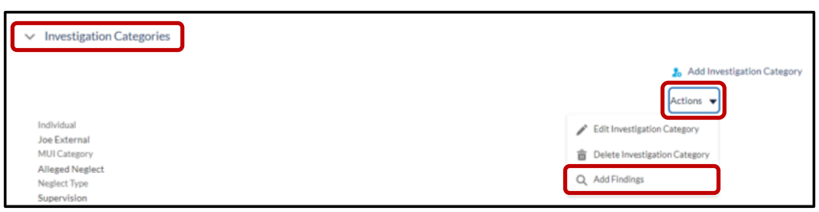
1. Go to the Guardians section of the MUI and make sure that section is expanded by clicking the **arrow** next to **Guardians** so that it points down. Click **Add Guardian**.

2. Fill out the form and make sure to click **Save Guardian Information** then click **Next**. If you don't click **Save Guardian Information** first it will not save to the MUI.

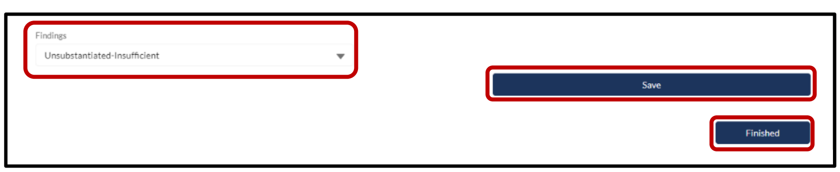


Add Findings

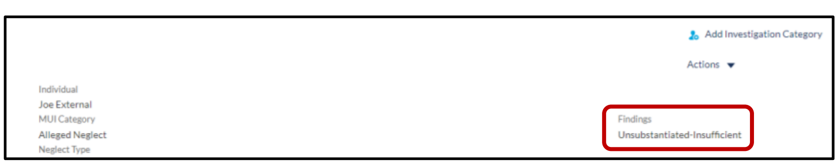
1. Go to the **Investigation Categories** section of the MUI and make sure that section is expanded by clicking the **icon** next to **Investigation Categories** so that it points down. Click on the **Actions** dropdown menu and select **Add Findings**.



2. Select the **Findings** from the dropdown menu, click **Save**, then click **Finished**.



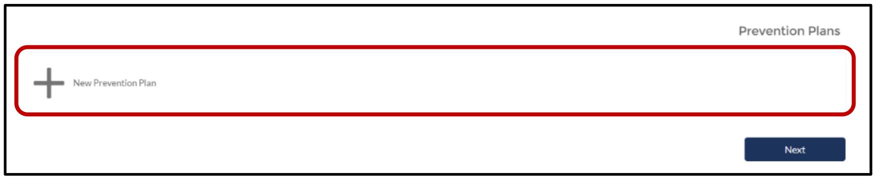
3. The findings will appear to the right of Investigation Category it is associated with.



Prevention Plans

1. Go to the **Investigation Categories** section of the MUI and make sure that section is expanded by clicking the **icon** next to **Investigation Categories** so that it points down. Expand the **Prevention Plan** section. Click **Add/Edit Prevention Plans**.

2. A popup will appear. Click the box that says **New Prevention Plan**.



3. Fill out the form and click **Save**.

4. Click **Next** when all prevention plans have been added. If you do not see the new prevention plan in the MUI, try refreshing your browser.

Extension Requests

1. Go to the **Extension Request** section of the MUI and make sure that section is expanded by clicking the **icon** next to **Extension Requests** so that it points down. Click **Create Extension Request**.

2. Fill out the form and click **Finish**.

Add Witnesses

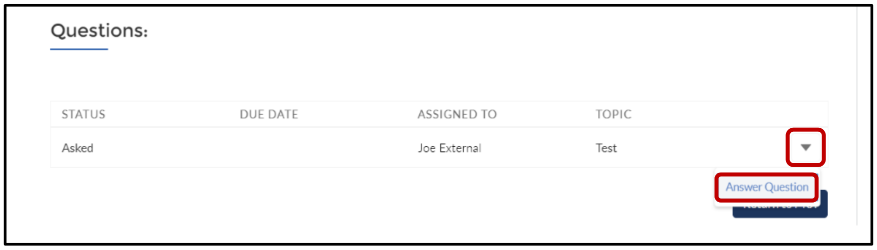
1. Go to the **Witnesses** section of the MUI and make sure that section is expanded by clicking the **icon** next to **Witnesses** so that it points down. Click **Add Witness**.

2. Fill out the form and click **Save Witness Record**.

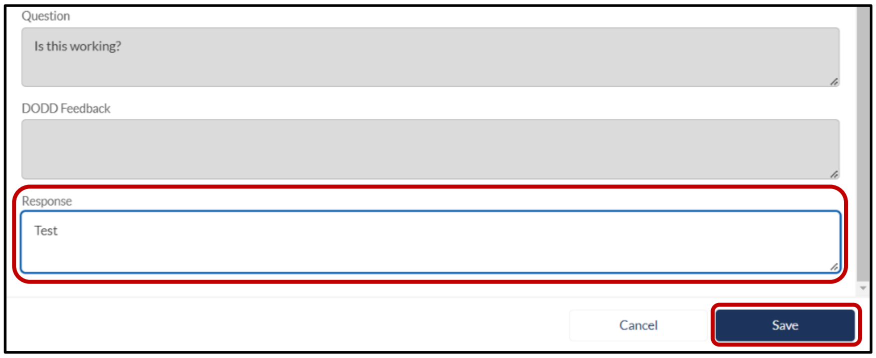
Answer Questions

1. Go to the **Questions** section of the MUI and make sure that section is expanded by clicking the **icon** next to **Questions** so that it points down. Click **Answer Questions**.

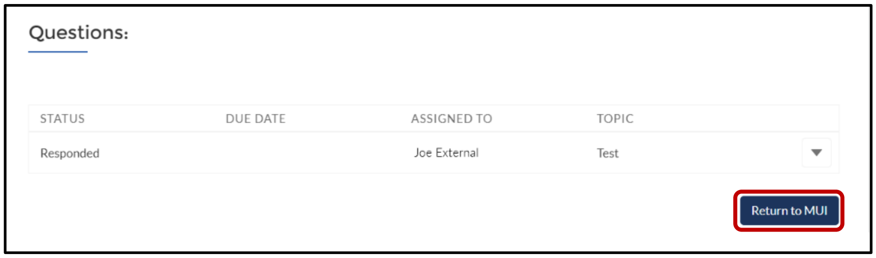
2. Click the **dropdown arrow** on the right side of the question and click **Answer Question**.



3. Fill in the **Response** field at the bottom and click **Save**. The question will be marked as "Responded" and the DODD staff will be able to view your submission.



4. Click **Return to MUI**.



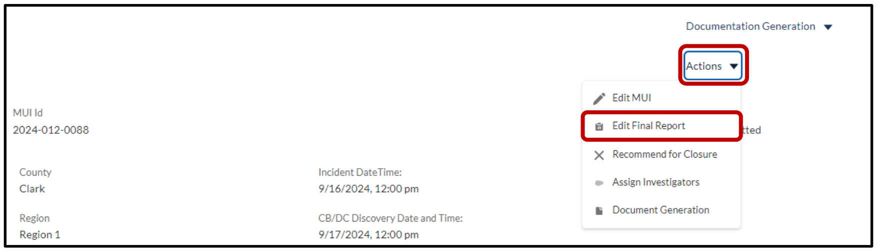
Add Comments

1. Go to the **Comments** section of the MUI and make sure that section is expanded by clicking the **icon** next to **Comments** so that it points down. Click **Add Comment**.

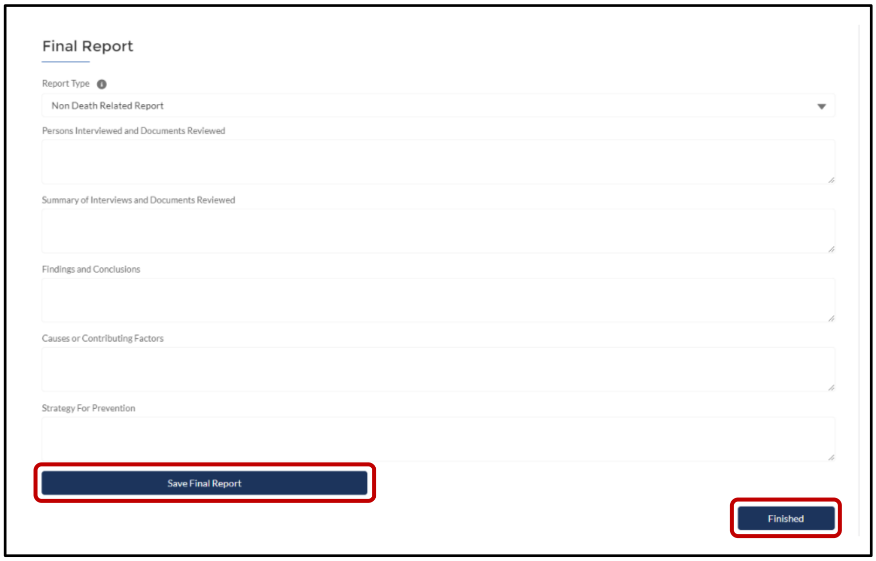
2. Fill out the fields and click **Next**.

Final Report

1. In the top right corner of the MUI, click the button that says **Actions** and select **Edit Final Report** from the dropdown menu.

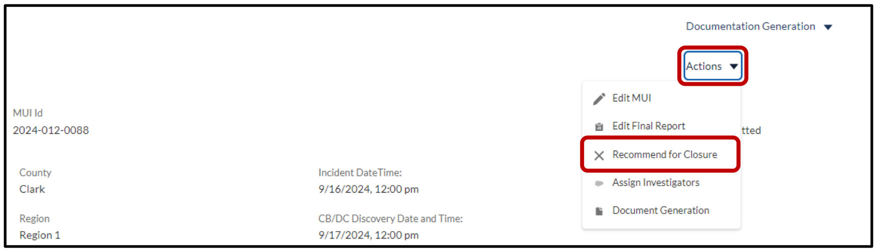


2. A popup will appear with the final report. Fill out the report then click **Save Final Report** then click **Finished**.

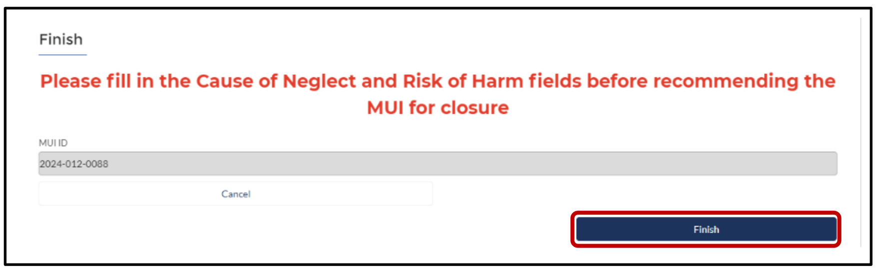


Close MUI

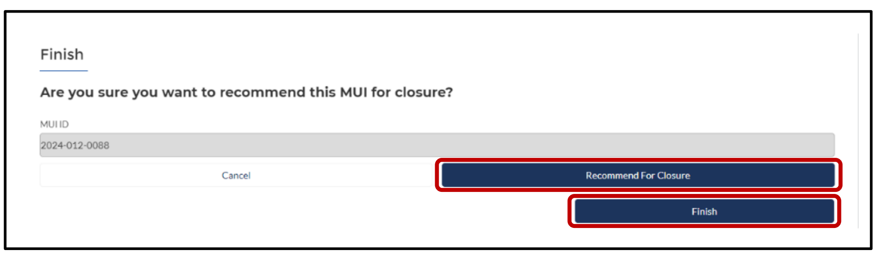
1. When you are ready to close the MUI, click the **Actions** button in the top right corner of the MUI and select **Recommend for Closure**.



If you are missing required fields you will receive a message asking you to fill out the missing fields before closure. You will not be able to close the MUI until all fields stated are complete. You can click **Cancel** or **Finish** to return to the MUI.



2. When you have met all the requirements for the MUI you will be asked if you are sure you want to recommend the MUI for closure. Click **Recommend For Closure** then click **Finish**.



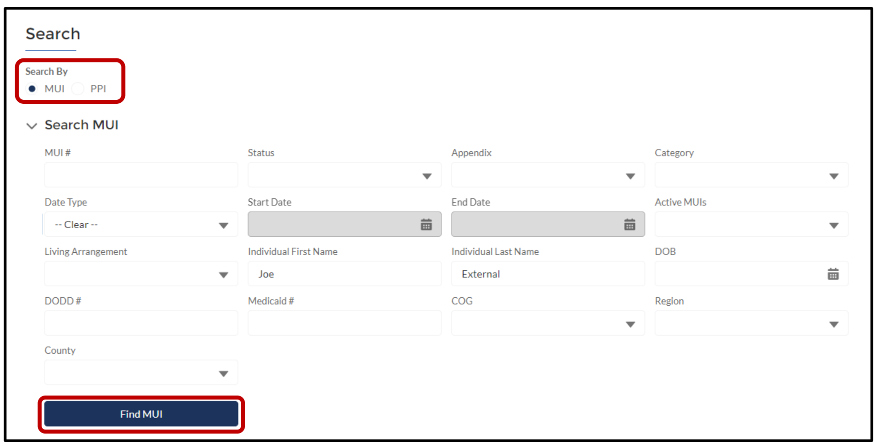
3. Once you have recommended for closure you will no longer be able to edit multiple sections of the MUI. DODD staff will process the MUI.

MUI Search

The MUI Search tool is a great way to locate an MUI or PPI. It will offer multiple search parameters to help locate the information you are looking for.

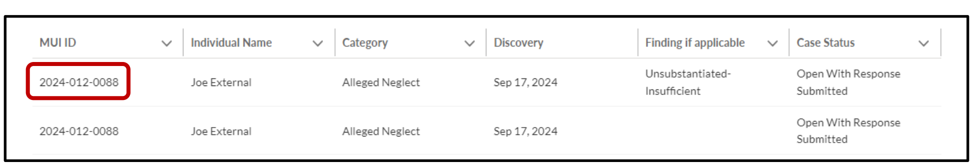
1. The MUI search tool can be found by clicking **MUI Search** tab in the OhioITMS navigation bar at the top of the page.

2. At the top of the search box, you will see the option to **Search By MUI** or **PPI**. Choose the one that fits your needs. Then fill out as much information as you can and click **Find MUI** or **Find PPI**.



The **Start Date** and **End Date** boxes will not be accessible unless you select the **Date Type** to left of those fields.

3. The search will provide a list of results based on the fields you filled out. There will be limited information about each MUI/PPI available. If you want more information you can copy and paste the MUI ID number in the global search at the top of the page.



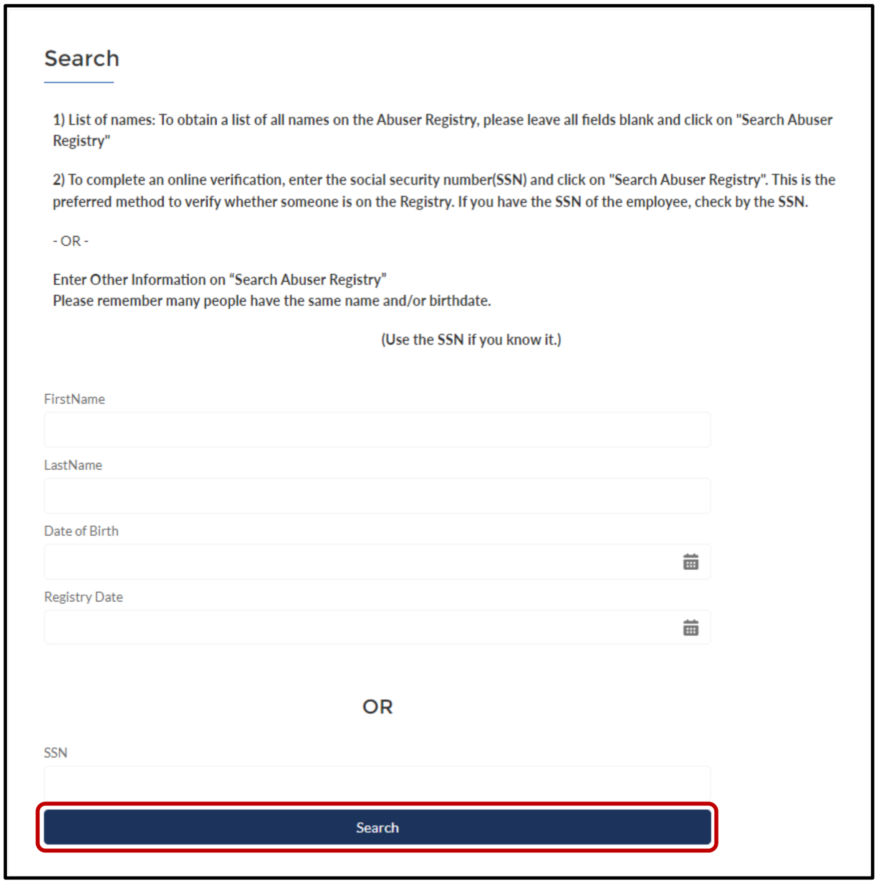
MUI ID	Individual Name	Category	Discovery	Finding if applicable	Case Status
2024-012-0088	Joe External	Alleged Neglect	Sep 17, 2024	Unsubstantiated-Insufficient	Open With Response Submitted
2024-012-0088	Joe External	Alleged Neglect	Sep 17, 2024		Open With Response Submitted

Abuser Registry

The Abuser Registry is available to be searched within the OhioITMS External Portal.

1. Click on **Abuser Registry** in the navigation bar at the top of the page.

2. Fill out the fields to the best of your ability. Use the person's Social Security Number if you have it. Click **Search**.

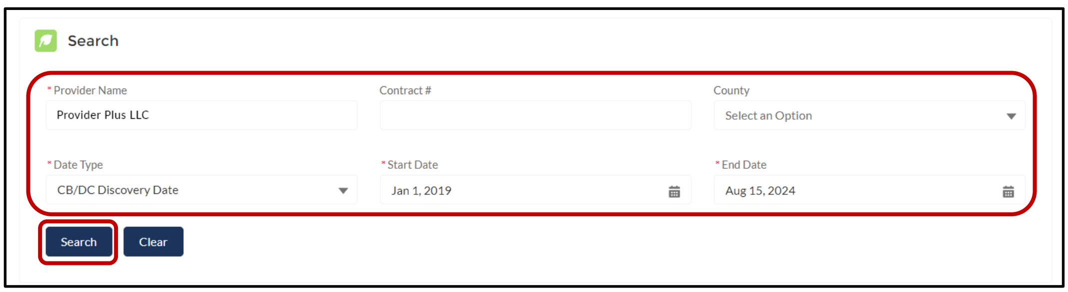


3. A list of results will show up below the search button. You can use the search bar above the results to filter the list further.

Using the Provider Search in OhioITMS

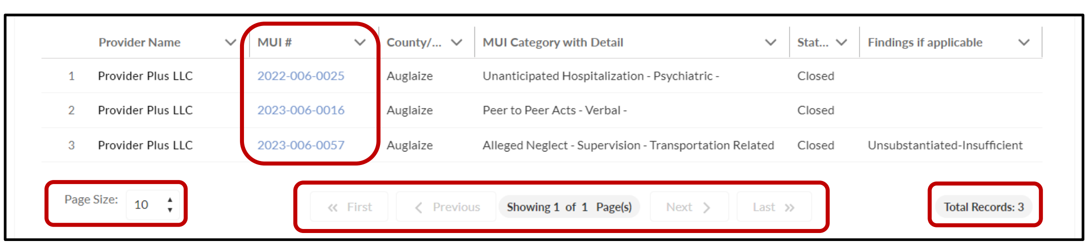
1. The provider search tool can be found by clicking on the **Provider Search** tab in the OhioITMS navigation bar.

2. You must fill in the mandatory fields marked with a red asterisk. The **Provider Name** entered needs to be identical to the certified name. The **Date Type** is a dropdown menu with multiple selections. If you want to narrow down your search, use the **Contract Number** or **County** fields in addition to the required fields. Click **Search** when all information is entered.



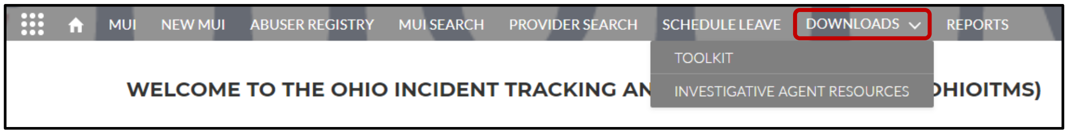
If you are unsure of the provider's name you can go to dodd.ohio.gov/your-family and use the "Find a Provider" tool on that page. The search results will reflect the provider's name as it is in the OhioITMS system.

3. Your search will bring up a list of all the MUIs associated with the provider. You can access all the MUIs listed by clicking on the blue **MUI Number** link in the **MUI #** column. You will see the number of **Total Records** in the bottom right corner. If the list is large, you can expand the **Page Size** in the bottom left or use the page navigation buttons at the bottom.



Downloads

The **Downloads** tab will have multiple resources for any user. Click on the tab and select one of the resources from the dropdown menu.

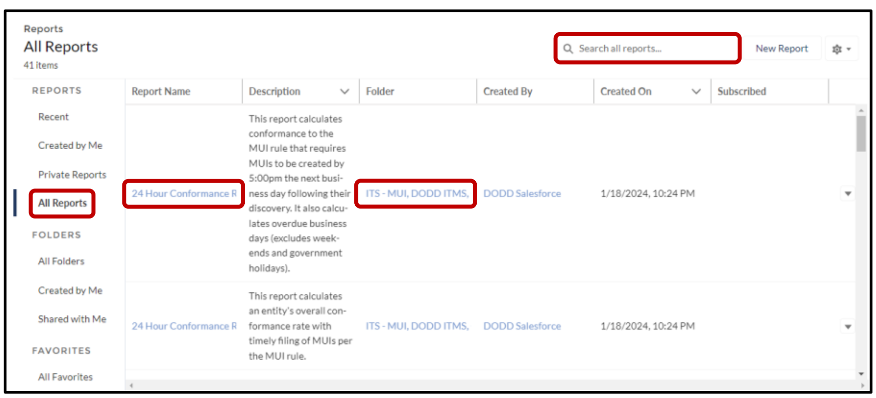


Reports

Users will have access to data reports created by the user or shared by others.

1. Click the **Reports** tab in the navigation bar at the top of the screen.

2. The left menu will have all the ways to view reports you have access to. The best way to find a report is to click on **All Reports** in the menu. You can use the **search bar** above the "All Reports" list to narrow down the results quickly or scroll through them. Click any **Report Name** or **Folder** in blue text to open it.



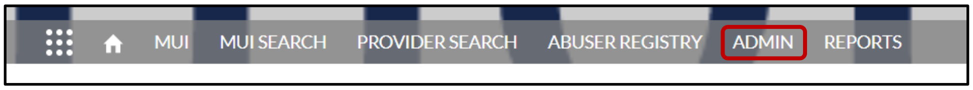
3. Click the **New Report** button in the top right of the section to create a customized report.

User Management

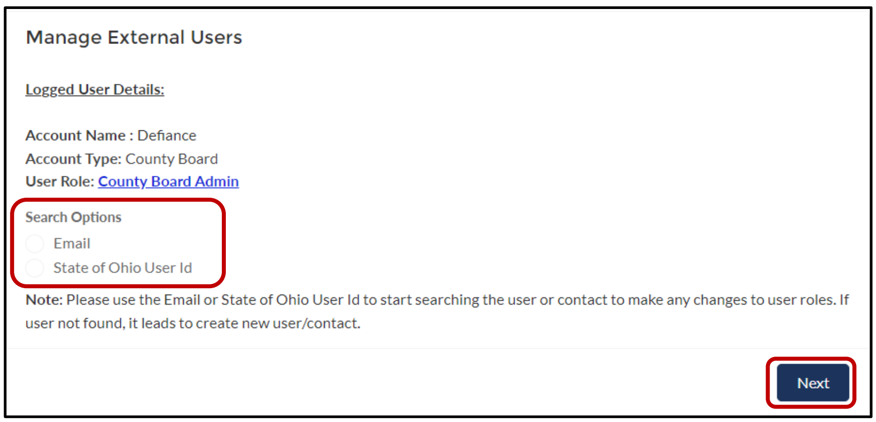
User Management is intended for those who are responsible for managing other employees' access to OhioITMS. If you run into errors during this process, reach out to the MUI team.

Search for and Create a New User

1. Click the **Admin** link located in the navigation bar at the top of the OhioITMS screen.

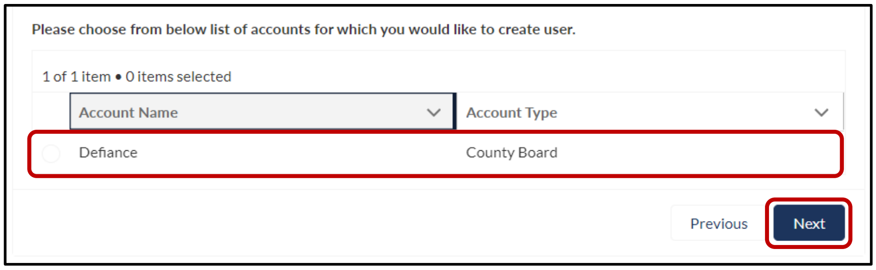


2. Search by **Email** (recommended) or **State of Ohio User Id** and click **Next**.



3. If no Users or Contacts are found in Salesforce but they are in the OHID system, you can create the User/Contact by selecting **Yes** and clicking **Next**.

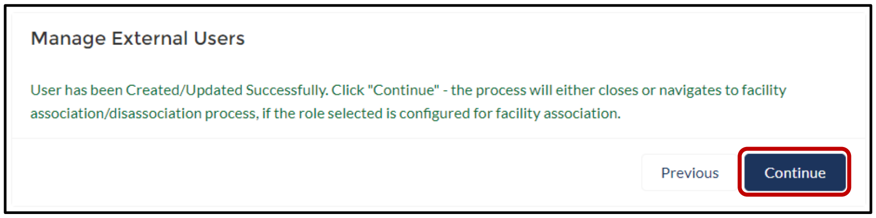
4. Select an available **Account** and click **Next**.



5. Select the **User** and an available **User Role**. Types of Roles available are dependent on the Account Type, i.e. County Board, Waiver Provider, etc. You will only see roles (IA, IA Supervisor, Provider, etc.) relevant to you.

6. Click **Next**.

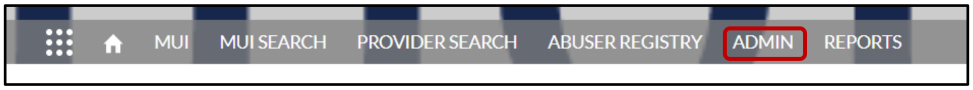
7. You will receive the following popup when you have successfully created the User. Click **Continue**.



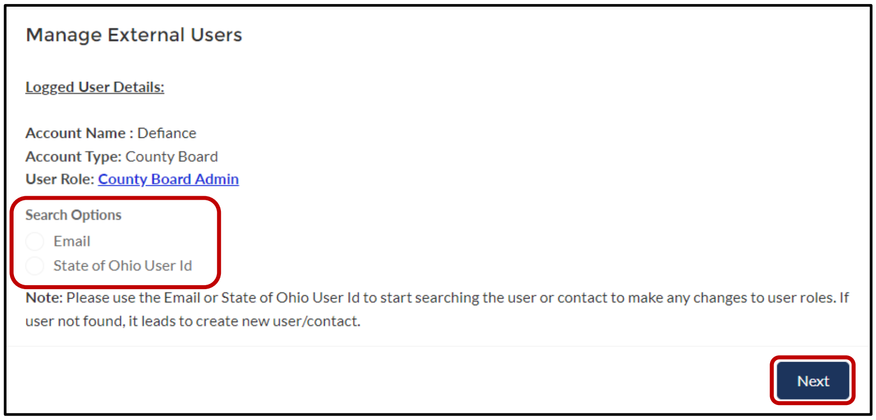
8. An email will be sent to the new User or Admin notifying them of the change.

Search for an Existing User and Update Permissions

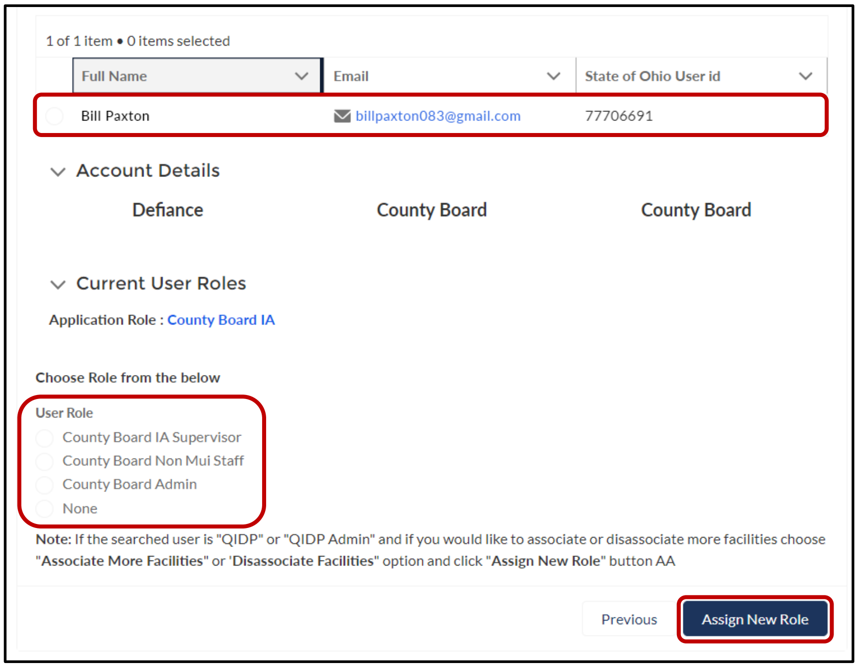
1. Click the **Admin** link located in the navigation bar at the top of the OhioITMS screen.



2. Search by **Email** (recommended) or **State of Ohio User Id** and click **Next**.

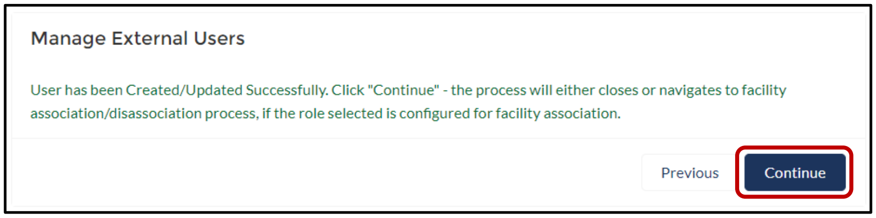


3. Select the **User**, choose a new **User Role**, and click **Assign New Role**.



Selecting the **None** option will remove all OhioITMS Roles from the User.

4. You will receive the following popup when you have successfully updated the User. Click **Continue**.



5. An email will be sent to the new User and Admin notifying them of the change.