



Support Plan Launch: Mentor & Supervisor Training

MnCHOICES Business & Rates Teams

Mentor & Supervisor Training - Purpose

Purpose: To prepare your agency for the MnCHOICES Support Plan launch

Agenda:

- Provide resources
- Provide training
- Establish training zone procedure for mentors
- Provide pre-and post launch direction

MnCHOICES Support Plan Expectations

When launching MnCHOICES Support Plan for running rates and creating CSPs or CSSPs

- Use the Rates Management System in the Support Plan and not in SSIS-RMS.
- For all MnCHOICES assessments and reassessments, create CSP and CSSP in the MnCHOICES Support Plan and rates in the service agreements and service lines in the person's CSSP.
- For all assessments created with the legacy document continue to use Community Support Plan with the Coordinated Services and Supports Plan form (DHS-6791B-ENG)(PDF) and create rates at the person in the Support Plan

Preparing for the Support Plan Launch



Prepare your Agency for Launch

1. Prepare and access the MnCHOICES - Support Plan Training Zone
2. Get to know online resources
3. Submit your user(s) for Support Plan access
4. Prepare your workflow
5. Practice training and workflow
6. Pre-launch expectations
7. Ongoing Support

1. MTZ-SP Training Preparation

- Training Zone Access
- Transferring MTZ-A Assessments
- Duplicating an Assessment
- MnCHOICES County Link, Support Plan, Launch

MnCHOICES Training Zones

Two Training Zones

MnCHOICES Assessment Training Zone MTZ-A

<https://mnchoices-train.dhs.state.mn.us/mnch/default.aspx#/LoginPage>

Support Plan launch lead sent original Assessment Launch email

MnCHOICES Help Desk can reset passwords

Where you prepare the **assessment** for support planning work

MTZ-A: User Names and Passwords

Assessment launch given user names and passwords

e.g. Banana County 1 and Banana County 2

Users in each group

e.g. Banana County 1, BAN001 to BAN015

Banana County 2, BAN016 to BAN030

Documents for Training in the Support Plan: Options

1. Use existing MTZ-A documents

Most created in 2014 & 2015

Need to be updated and eligibility ran one time

Launch mentor sent out MTZ-A list of document

2. Use Duplicate assessments in MTZ-A – all agencies, 2 per user

e.g. Banana County 1, BAN001 in the assignment queue

3. Both – use duplicate to learn and MTZ-A for thorough review

Use existing MTZ-A documents

- Assessments created in MnCAT Step 3
- Steps to prepare for Support Plan Training:
 - Complete Assessments in detail that mirrors your present work. Current Training Zone Assessments have little content.
 - Set to zero
 - Run Eligibility (online)
 - Do NOT close the assessment

Training Recommendation

- Duplicates assessments for basic Support Plan Training
- MTZ-A Step 3 assessment for assessors to complete like they do their work
 - See how their work moves into the Support Plan
 - Inform their assessment work
 - Reevaluate assessment work

MTZ-A Duplicate Slides

Duplicates in two assignment queues

- Banana County 1, BAN001 in the assignment queue
- Banana County 6, BAN006 in the assignment queue

Assignment not assessment queue

MTZ-SP Training Preparation, 5: Duplicating an assessment, steps 4 and 5

Assign duplicate to Support Plan users

Duplicates assessments and how it will work

MnCHOICES Business creates duplicate reassessment for your Support Plan training

Your agency requests duplicates

Your launch lead will receive notification that there are fake people with duplicate reassessment in their assignment queue:

The launch lead will

- Go to your MTZ-A User **assignment queue not assessment queue**
- Assign reassessments to MTZ-A users for training

Duplicate assessment preparation for Support Plan user

Mentors will ask their users to prepare their duplicate reassessment in MnCHOICES Assessment. They will instruct users to

- Search for person in the MnCHOICES Assessment and click “update person”
- User enters assessment date and views the assessment
- User runs eligibility and answers any unanswered questions
- Document is now ready for Support Plan creation and testing/training
- User goes to Support Plan and searches for the person or reassessment ID and begins Support Plan training

MTZ-SP: User Names and Passwords

MnCHOICES Support Plan Training Zone MTZ-SP

<https://mnch-supplan-train.dhs.mn.gov/>

- Separate User Names and Passwords to launch leads
- Rates, CSP and CSSP
- MnCHOICES County Link Training Page
- TrainLink: MNSP1000

How to use the Training Zone

- URL for Training Zone
- User Names and passwords which you will provide to users
- Manage the training process for CSP/CSSP or Rates users
- Have your training mirror your agency work flow



Questions



2. Get to know your Launch Resources

[MnCHOICES County Link](#)

- [Help Desk](#)
- [Support Plan](#)
- [Training](#)



MnCHOICES County Link Page – Help Desk

[Help Desk](#)

- How to submit Support Plan requests to the Help Desk
- User passwords and locks out
- Technical Policy and other



MnCHOICES County Link Page – Support Plan

[Support Plan Page](#)

- Are You Ready To Launch?
- Crosswalk document
- Handling Mn Information Securely Link
- Launch Schedule
- Webinars
- Support Plan Technical Specifications



Are You Ready To Launch?

Are You Ready To Launch provides you:

- A launch preparation list for your agency
- A Resource List with live links to key materials for Launch
- Review Actual Document



Purpose: to provide users with a list of issues the support plan is having at it's current time and ways to work around them.

Prioritized by the MnCHOICES Business team for repair in future releases

Active document



Technical Specifications

- Support Plan Technical Specifications
- Support Plan HTML
- Minimum standard
- Not listed, unable to support



Outage Schedule

- Assessment & Support Plan Outages
- [2016-2017 Anticipated Assessment Release and Outage Schedule](#)
- How to read it



MnCHOICES County Link – Training Page

Training Page

- Rates
- Support Plan
- EW Rates materials



MnCHOICES Support Plan – User Manual

[Support Plan User Manual](#)

Where to find it?

Tour




My Agency: ZBeta Test Aitkin **Lead Agency:** ZBeta Test Aitkin

Type/Status	ID	CM/CC	Plan Owner
CSSP (Open)	1301		Teresa vanderBent

Create New CSSP View CSP Print CSSP Save

Summary Eligibility Referrals CSP Worksheet Caregiver Services Support Instructions Risk Signatures About Plan Log Out



Community-Based Services Manual (CBSM)

Policy Quest

- About
- Search
- Login (submit a question)

Minnesota Statute Section 256B.0911



3. Submit your user list for Support Plan access

Onboarding sheet out of agency contact: April 20, 2017

Onboarding sheet back to DHS: May 23, 2017

User Access will check data privacy courses against [Data Privacy Training – Handling MN Information Securely](#)

Role: None at this time

My Agency and On Behalf of

Onboarding Webinar, April 27, 2017

User Access for Production

Login Credentials:

- User Name will be X numbers or a PW number for contracted agencies
- User Password temporary, reset prompt at first log in

User Maintenance:

- Begins when you receive your user names and passwords
- User Maintenance submit to SSAM group
- Password resets to the Support Plan Help Desk

Contracted agency staff receive access through the lead agency for whom they work

- Onboarded users will receive two emails

user number

password

Mentors will not receive user names and passwords



Break: 10 minutes

Support Plan Training & Work Flow – Let's Play



MnCHOICES Assessment Workflow –CSP, CSSP and Rates

CSP summarizes for the person what was learned and decided upon during the assessment process:

- What is important to the person
- Identified assessed needs for supports
- Determined health & safety risks
- Next steps
- Certified assessors create CSP

CSSP identifies the services a person needs, their choice of providers, and how those services are paid

- “Planner” creates CSSP
- Rates runs rate in CSSP for the services



Which tabs do you use to create the CSP?

What tabs are shared and why?

How do you know you have completed the CSP?

Support Plan Tabs

mn DEPARTMENT OF HUMAN SERVICES

My Agency: ZBeta Test Aitkin **Lead Agency:** ZBeta Test Aitkin

Name	PMI	Type/Status	ID	CM/CC	Plan Owner
Grape Sara	Not Found	CSP (Closed)	1284		Teresa vanderBent

Search My Plans Person Information Goals Needs Summary Eligibility Referrals CSP Worksheet Caregiver Services Support Instructions Risk Next Steps About Plan Log Out

GOALS

mn DEPARTMENT OF HUMAN SERVICES

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Create New CSSP View CSP Print CSSP Save

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ABOUT PLAN

Place to Start: CSP Workflow



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Search My Plans Person Information Goals Needs Summary Eligibility Referrals CSP Worksheet Caregiver Services Support Instructions Risk Next Steps About Plan Log Out

GOALS

- Person Information (both)
- Goal (both)
- Needs Summary
- Eligibility
- Referral
- CSP Worksheet
- Risk (both)
- About Plan (both)
- Next Steps

How Do I Know my CSP is Complete?

- Review all CSP tabs
- Make any needed changes in the Assessment and run eligibility again
- Review CSP content to ensure it's written to the person receiving it
- Make changes in CSP
- Close Assessment and Close CSP

Place to Start: CSSP Workflow



My Agency: ZBeta Test Aitkin Lead Agency: ZBeta Test Aitkin

Name	PMI	Type/Status	ID	CM/CC	Plan Owner
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Search My Plans Person Information Goals Needs Summary Eligibility Referrals CSP Worksheet Caregiver Services Support Instructions Risk Signatures About Plan Log Out

- Person Information (both)
- Goal (both)
- Caregiver
- Services
- Support Instructions
- Risk (both)
- About Plan (both)
- Signature

How Do I Know the CSSP is Complete?

- Review the CSSP tabs
- Ask questions of the Assessor to clarify
- Finish to ensure the person's plan has the coordinated services and supports they identified
- Rates will be run in the services tab per your lead agency protocol
- Go to the Service Tab, review the agreement and its service lines to ensure they are complete
- Review CSSP content to ensure it's written to the person receiving it

Support Plan Terms

There are certain terms used in MnSP that need definition as they have specific meaning in the workflow steps.

- Create
- Open
- Closed
- Complete
- Approve
- Save & close
- Save

- Assessment open and CSP open
- CSSP creation:
 - Closed Assessment
 - Closed CSP
- CSSP: Complete and closed difference
- CSSP: Copying over
- Service line: approve not authorize
- Rates and case manager



Training Your Staff



Training Zone: Assessment and Support Plan

Assessment Training Zone URL

- <https://mnchoices-train.dhs.state.mn.us/mnch/default.aspx#/LoginPage>
- Assessment User Name and Password
- Person and Assessment number for the Training Zone

Support Plan Training Zone URL

- <https://mnch-supplan-train.dhs.mn.gov/>
- [Support Plan Try It! Companion Document](#)
- Assign your users to documents based on work flow



Introduction to the Support Plan Try It Training Companion



Training Companion Document

Support Plan Try It! Companion Document

Courtesy Reminder

- Suggested Training by Role
- Support Plan module List in suggested order
- Try It! Instructions
- Work Flow - Which tabs do you use to create
- How do you know you are done?



Support Plan
Try It!
Training Companion

Support Plan Training

MnCHOICES Support Plan - Login

My Agency:

User Name:

Password:

Login

Warning!

This system is the property of the State of Minnesota. Use of this system without appropriate authority, or in excess of authority, may result in

- Disciplinary action
- Criminal sanctions and/or other appropriate action

By continuing to use this system, you are representing yourself as an authorized user Any activity on this system may be

- Monitored
- Accessed by the State of Minnesota or other authorized officials at any time
- This includes any data created or stored using this system. All such data is subject to the Minnesota Government Data Practices Act
- Any identified evidence of possible criminal activity will be provided to appropriate law enforcement agencies
- Report violations of unauthorized use to 651-297-1111.

MnCHOICES Support Plan Expectations

When launching MnCHOICES Support Plan for running rates and creating CSPs or CSSPs

- Use the Rate Management System in the Support Plan and not in SSIS-RMS.
- For all MnCHOICES assessments and reassessments, create CSP and CSSP in the MnCHOICES Support Plan and rates in the service agreements and service lines in the person's CSSP.
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Mentor Prepare for Staff Training

Who and how many need training

- assessors
- planners (case managers & case aides)
- rates

Number of duplicate assessments

Work Flow Example

Set Up Training Structure and Work Flow

- Assessors works in open assessment and open CSP in MnCHOICES Support Plan
- Assessor closes CSP and notifies case manager
- Case manager creates a CSSP
- Rates person or case manager calculates rates for person
- Service Agreement Report printed for MMIS input and authorizing services

CSP: Mentor Assigns Document & Establishes Work Flow

1. CSP: Give each person a user name, password and name of a person with an assessment
2. CSP: Provide them the TrainLink site, companion document & the training modules to take
3. CSP: Provide instructions on when CSP is complete

CSSP & Rates: Mentor Assigns Document & Establishes Work Flow

1. CSSP:

- User name and password from mentor
- Notify they should create the CSSP for person

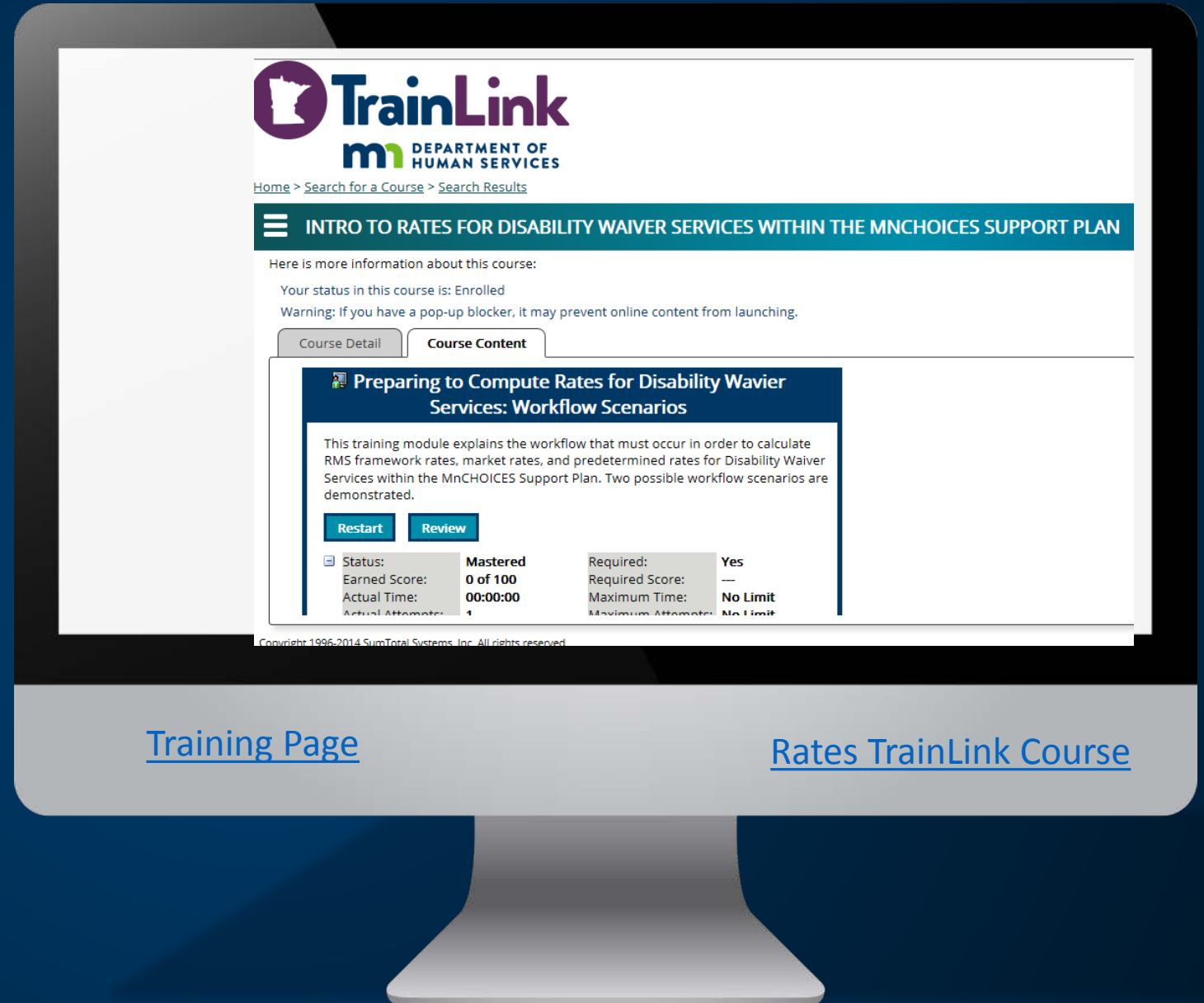
2. Rates:

- User name and password from mentor
- Assign Rates to person
- Rates in a CSSP

Rates Training TrainLink Course MNSP_R100

Course Link

MnCHOICES CountyLink, Training Page, Rates heading



Rates Training – Key Terms

Predetermined rate: Services with only one allowable service rate. Rate is the same for each person. System will produce the rate

Market Rate: Services with contracted rates determined by the lead agency and provider – rates vary – user will input the rate

Framework rate: Services with a Rate Management System calculation - input information and the Rate Management System will calculate the rate – these are Disability Waiver Rate System services

Rates for a legacy document

*For all assessments created with the legacy document continue to use Community Support Plan with the Coordinated Services and Supports Plan form (DHS-6791B-ENG)(PDF) **and create rates at the person in the Support Plan***

- Calculate a rate at the person
- All rates will be documented for future support planning
- Requires you insert a person in MnCHOICES Assessment

Rate for a person not in MnCHOICES Assessment

Insert a person in MnCHOICES Assessment

- Consider staff access
- [Assigning SSIS users MnCHOICES Functions Intake Role](#)
- Person is in SSIS or MMIS can search for them in the Assessment
- Search for the person by: name, gender and age range 0 to 100
- Searches state database
- Select the person, click insert person button

Running a rate at a Person

- Learn more Support Plan Training Module: Creating Rate Plan
- [County Link: Rates Training](#)
- Let's Try It – Steps include
 - Search for person
 - Create Plan
 - Create Rate Plan
 - Service Tab

MnSP Training Module

Assignment

- Highlight Settings Feature
- Complete Training Modules Person Search and Creating a CSP and CSSP
- [TrainLink Support Plan Training MNSP1000](#)
- Use the MnCHOICES Support Plan Try It! Companion document for modules
 - Try It! Exercises
 - Create but do not close your CSP
 - Use the Work Flow in Try It! Companion for CSP



Review these modules using Trainer CSP

- **Opening and Closing CSPs and CSSPs**
- **About Plan**
- **My Plan**

Assist your work in providing and promoting training



Printing Plans for CSP and CSSP

- Phase 1: Add Summary Page and remove all unnecessary spacing

By First Launch Group start March 17, 2017

- Phase 2: Re-create CSP and CSSP document

Goal by Summer 2017

Currently being sized



Break: 10 minutes

Pre-Launch Expectations

- Review the Are You Ready To Launch? Document in County Link Support Plan page
- Mentor/Supervisor access to MTZ and TrainLink
- Compare and contrast how your current workflow fits with MnCHOICES
- Participate in a pre -launch phone calls
- Go-No-Go Meeting

7. Ongoing Support: How Can You Help?

- Work with your staff to develop a style or strategy that allows them to be successful in MnCHOICES
- Set schedule for ongoing multi-disciplinary team meetings
- Attend MLL if you are a supervisor or mentor
- Be willing to share your agency's approach to Intake, work flow, and training
- Ask questions/share your perspective

Ongoing Support: MnCHOICES Mentors Role

**You are your agency's
principal MnCHOICES
contact and resource person**



Mentor Primary Functions

1. Supporting Users

- Encourage and coach staff
- Provide hands-on support
- Help identify issues and problem solve

2. Foster collaborations between your agency and DHS



MnCHOICES Mentor will

- Communicate with Help Desk
- Provide troubleshooting to MnCHOICES users
- Distribute Communications
 - Outages
 - Release & companion notes
 - Other
- Attend meetings and trainings
- Be a MnCHOICES power-user



Mentor Training and Support

MnCHOICES New Mentor Training

MnCHOICES Mentor Alliance

MnCHOICES Help Desk

MnCHOICES Matters

MnCHOICES County Link

MnCHOICES Office Hours



MnCHOICES New Mentor Training

- Spring of each year
- Assessment Mentors & Support Plan Mentors
- Trains you to your role and provides support materials
- Support Plan Mentor Training. Part of the Spring 2017



MnCHOICES Mentors Alliance (MMA)

- Meets quarterly
- In St. Cloud
- 9 am – 3:30
- Sometimes Web-Ex
- Shortly before release
- Next February 16, 2017



RMS Mentors in the MnCHOICES Support Plan

- Continue in your role
- Receive Support Plan outage messages and provide pertinent release information to rates users
- Work with Support Plan Mentors to support your agency's launch and implementation of the MnCHOICES Support

Support Plan Launch



Mentor & Supervisor Next Steps – Training Zone Access

1. Match users with their Training Zone Information
2. Provide your users
 - URL for MTZ-SP
 - User name and password
 - MTZ-SP Person and document information
 - Work Flow instructions
 - The Support Plan Try It! Companion Document
 - Read module order and introductory pages and
 - Pages on work flow

Mentor & Supervisor Next Steps – CSP Support Plan Training

- ### 3. Support Plan Training Modules in Train Link - CSP users
- Complete the introductory modules and all the CSP modules and
 - Follow the CSP Work flow in the Try It! Companion document
 - When Assessment and CSP are closed notify CSSP user

Mentor & Supervisor Next Steps – CSSP Support Plan Training

4. Support Plan Training Modules in Train Link - CSSP users
 - Complete the introductory modules and all the CSSP modules
 - When notified by the person completing the CSP that the assessment and CSP are closed, follow the CSSP work flow in the Try It! Companion document.
 - Provide instruction on how to work with rates & MMIS staff

Mentor & Supervisor Next Steps – Rate Plan Training

4. Rate Training for rates user

- Complete the Support Plan Training introductory modules and Printing CSP/CSSP and Rates modules
- Take the Rates Training
- Create and communicate work flow between people
 - Creating and completing the planning for the CSSP
 - Creating the rates in the service agreements, and service, lines and
 - Entry into MMIS

Launch Preparation & Support

Support Plan Training & Work Flow Discussion with staff

Staff in Training Zone

Pre – Launch Meeting

- Are You Ready To Launch? discussion
- Receive Known Issues and other resources
- Outage & the Go/No-Go Process reviewed

Go Email Receive URL

Post Launch Phone Calls



Thank you

MnCHOICES Business & Rates Teams



Questions