



DEPARTMENT OF  
HUMAN SERVICES



# Support Plan Launch: Supervisor & Mentor Training

MnCHOICES Business & Rates Teams

# Supervisor and Mentor 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 Expectation – Revised

## *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 level 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

# Prepare for Training



# 1. Training Preparation

- Training Zone Access
- Duplicating an Assessment
- MnCHOICES County Link, Support Plan, Launch



# Training Zones, User Names & Passwords

Two Training Zones - Each has it's own URL & user names

MnCHOICES Help Desk can reset passwords

- **MnCHOICES Training Zone Assessment (MTZ-A)** for assessors <https://mnchoices-train.dhs.state.mn.us/mnch/#/LoginPage>
- **MnCHOICES Training Zone Support Plan (MTZ-SP)** for assessors, rates and case managers – Supervisor Mentor Training <https://mnch-supplan-train.dhs.mn.gov/>



# 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 documents

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

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



# Training Option 1: Using 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.
  - Update the assessment and answer all the questions
  - Run eligibility (online)
  - Do NOT close the assessment



# MTZ – A list

FIRST_NAME	LAST_NAME	DOC_ID	DOC_SUBTYPE_DESC	STATUS	GENDER	DOB	BUS_NAME	DEFAULT_FORMATTED_NAME
Apple	Orange	1234	New Assessment	Open	M	08-SEP-70	Banana County 1	Banana County 1, BAN001
Lemon	Tart	5678	New Assessment	Open	F	08-SEP-74	Banana County 1	Banana County 1, BAN002
Gilbert	Grape	910	New Assessment	Open	M	08-SEP-70	Banana County 1	Banana County 1, BAN003
Avacado	Bananas	1112	New Assessment	Open	F	08-SEP-74	Banana County 1	Banana County 1, BAN004
Your	Fruit	1314	New Assessment	Open	M	24-FEB-37	Banana County 2	Banana County 2, BAN011
Peachy	Person	1516	New Assessment	Open	F	09-JUL-65	Banana County 2	Banana County 2, BAN012
My	Person	1718	New Assessment	Open	M	17-OCT-00	Banana County 2	Banana County 2, BAN013



# Training Option 2 - Recommended: Duplicates assessments and how it will work

MnCHOICES Business created a duplicate assessment for your Support Plan training

All lead agencies will receive duplicates, two times their users

Your launch lead will receive notification that there are fictitious 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 (reassessment)

- MnCHOICES Policy created an assessment for a 17-Year old male
- This assessment was created to decrease your training prep time
- When MnCHOICES copies, it becomes a reassessment
- Duplicates equal to two times the number of Support Plan users
- Duplicates have different fictitious names per reassessment created



# MTZ-A User Names in 2 Groups



Minnesota Department of **Human Services**



**MnCHOICES Training Zone Information**  
for Banana County

- Agency abbreviation = BAN **#20** total usernames available

Two lead agency groups = Banana County 1 and Banana County 2

- Users 001-010 are associated with Lead agency = Banana County 1
- Users 011-020 are associated with Lead agency = Banana County 2

# Assigning Duplicates in County 1 and County 2

- For example, Banana County 1, BAN001 will receive duplicates in the assignment queue but will only be able to assign the duplicate to the users in Banana County 1
- **Assignment queue:** All fictitious people and their reassessment will be placed in the assignment queue for County 1, user number and County 2 user number
- Mentors will assign duplicate reassessments in MTZ-A to users



# MTZ-A Duplicate Slides

Duplicates in two assignment queues

- Banana County 1, BAN001 in the assignment queue
- Banana County 2, BAN011 in the assignment queue

**Assignment** not assessment queue

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



# 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
- Where assessors (CSP), planners (CSSP) and rates users work



# MTZ-SP User Names and Passwords

My Agency	USER_ID	PASSWORD	Staff name assigned to
Banana	Banana1	password	
Banana	Banana2	password	
Banana	Banana3	password	
We Can Help -Banana	Banana4	password	
We Can Help -Banana	Banana5	password	



# Training Recommendation

- Duplicate 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





# Different: MTZ-A and MTZ-SP URL's and user names

- **MnCHOICES Training Zone Assessment (MTZ-A)** for assessors  
<https://mnchoices-train.dhs.state.mn.us/mnch/#/LoginPage>
- User name example: BAN001
- **MnCHOICES Training Zone Support Plan (MTZ-SP)** for assessors, rates and case managers – Supervisor Mentor Training  
<https://mnch-supplan-train.dhs.mn.gov/>
- User name example: Banana1



# Process for coordinating Training Document

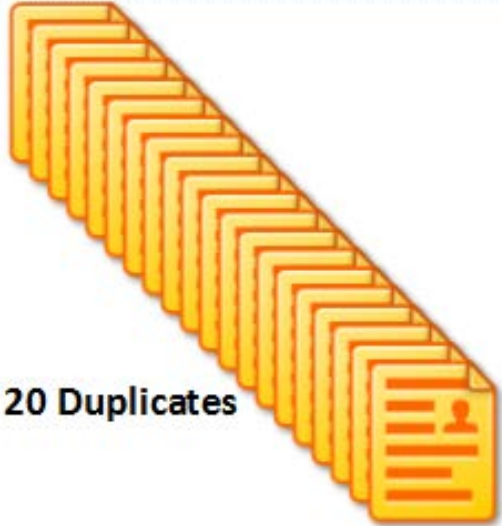
- Banana County reported 20 Support Plan users to MnCHOICES
- 40 Duplicates were created (20 users times 2 duplicates per user)
  - Banana County 1, BAN001 in the assignment queue: 20 reassessments
  - Banana County 2, BAN011 in the assignment queue: 20 reassessments

Banana County Support Plan's 20 users are

- Assessors: 10
- Case managers: 10



# Duplicates in the assignment queue

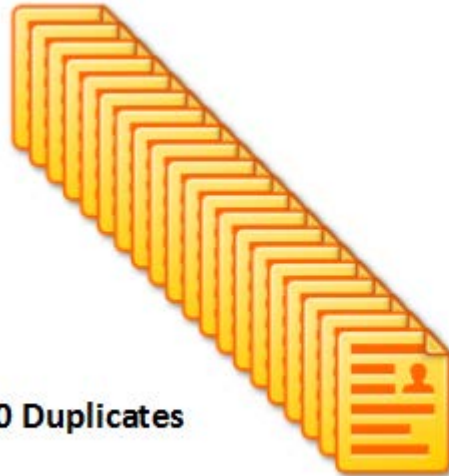


20 Duplicates



10 Assessors

Banana County 1, User BAN001



20 Duplicates



10 Case managers

Banana County 2, User BAN011



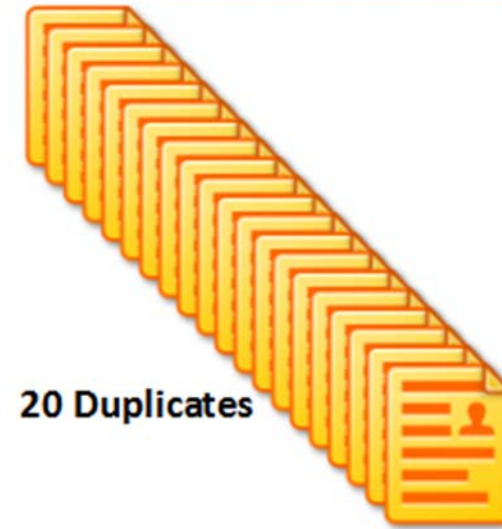
# Coordinating Training Documents in MTZ-A: Assessors

Banana County 1, BAN001 in the assignment queue: 20 reassessments

Mentor assigns duplicates to assessors from the [assignment queue](#)

- BAN002 to BAN010 as user names
- Gives them “password”
- Assessors prepare their duplicates

[MTZ-SP Training Preparation, 5:](#)  
Duplicating an assessment, steps 4 and 5



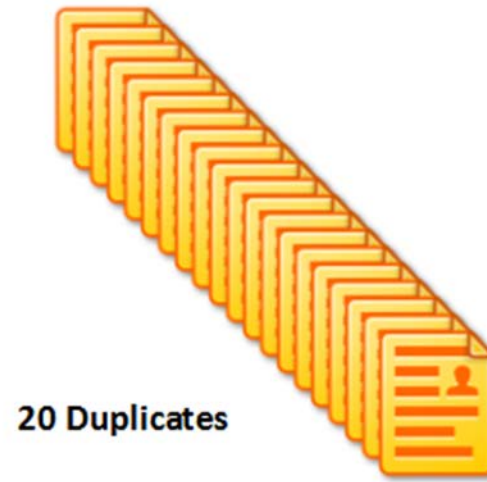
10 Assessors



# Coordinating Training Documents in MTZ-A: Case managers

Banana County 2, BAN011 in the assignment queue: 20 reassessments

- **Case managers cannot prepare assessment - do not have access to MnCHOICES Assessment PROD or the Training Zone (MTZ-A)**
- **Option 1** assessors complete and close the CSP – About Plan secondary owner
- **Option 2:** mentor/assessor prepares the duplicate reassessments and closes the reassessments
  - Notifies the case manager of the reassessment ID and
  - The case manager creates and closes a CSP, and creates and works in the CSSP



10 Case managers



# How to use the Training Zone

- URL for Training Zone
- User names and passwords
- Manage the training process for CSP/CSSP or Rates users
- Have your training mirror your agency work flow



# Launch Lead: Training Email

Minnesota Department of Human Services



**Attached:** Your agency's user names and passwords for MnCHOICES Support Plan Training Zone

**Purpose of this message:** To provide your supervisors and mentors the information they need to train staff in the MnCHOICES Support Plan.

Staff should use the following to complete their Support Plan training:

## [MnCHOICES Assessment Training Zone](#) (MTZ-A)

Assessors will work in MTZ-A to make any changes to their assessment to ensure the CSP information carried over from the assessment is complete.

- MTZ-A URL <https://mnchoices-train.dhs.state.mn.us/mnch/default.aspx#/LoginPage>
- Your user names were sent to your agency in April. Example for Banana County 1, BAN001

## [MnCHOICES Support Plan Training Zone](#) (MTZ-SP)

Assessors, rates and case managers will work in this training zone to complete the CSP, rates calculations, setting up services and creating the CSSP. This group may include contracted case managers as well.

- MTZ-SP URL: <https://mnch-supplan-train.dhs.mn.gov/>
- Your user names are attached and will look like this Banana1
- Make sure assessors use their e.g. BAN001 for MTZ-A and their Banana1 for MTZ-SP.
- If a user is locked out of MTZ-SP access, it is our experience that they are trying to log in with the MTZ-A User Name & password. The Help Desk will assist with User lockouts/password resets.

## [MnCHOICES County Link, Training Page, Rates & Support Plan Headings](#)

- [Rates Training Course List](#)
- [Crosswalk: Assessment and Support Plan](#)



# Launch Lead: Duplicates Email

## MTZ-SP Training Preparation, 5: Duplicating assessments, steps 4 and 5

Department of Human Services MnCHOICES Training Zone (MTZ)

Person Intake Assignment Assessment User Profile Data Export Logout

Workload

Assessor	Active Assessments	Active HRAs
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Assigner: Banana County 1, Use Refresh Data

Assignment

Assign To	Assign	Id	Sub-Type	Assignable Date	Last Name	First Name	Date of Birth	Age	Physic
	Assign	9385	Intake	7/7/2014	Bean	Betsy	6/27/1971	45 yrs	1900 1
	Assign	25826	Reassessment	5/3/2017	Blake	Kelvin	5/3/2000	17 yrs	
	Assign	25828	Reassessment	5/3/2017	Garrett	Lester	5/3/2000	17 yrs	
	Assign	25827	Reassessment	5/3/2017	Griffin	Nicholas	5/3/2000	17 yrs	
	Assign	25823	Reassessment	5/3/2017	Herrera	Craig	5/3/2000	17 yrs	
	Assign	25824	Reassessment	5/3/2017	Hubbard	Dale	5/3/2000	17 yrs	
	Assign	25822	Reassessment	5/3/2017	Kimbrell	Norris	5/3/2000	17 yrs	





# 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



# MnCHOICES Support Plan Access



### 3. Submit your user list for Support Plan access

Onboarding sheet emailed to 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

[Support Plan Webinars – Disability Services Division training archive](#)  
**Listen to onboarding training**



# Additional SSAM onboarding advice

- **Multiple X1 Numbers:** The agency with whom you are employed. If you more than one X1 choose and submit only one.
- **TrainLink IDs and X1 Numbers:** If you were given an X1 for TrainLink/MMIS access and/or use your X1 for Train Link access, submit it on the onboarding sheet for the Support Plan
- **Other TrainLink IDs:** Submit only PW numbers on the Onboarding sheet. Do not submit A or B or any other numbers.
- An **inactive X1 number** can be submitted to SSAM on the onboarding sheet
- SSAM Team will verify every ID provided.



# User Access for Production

## Login Credentials:

- User Name will be X number 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
- Agency security liaison submits any user changes to the SSAM team
- Your mentor submits password resets to the Support Plan Help Desk
- Adding mentor as Security Liaison?



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





**It's Time For A Break**



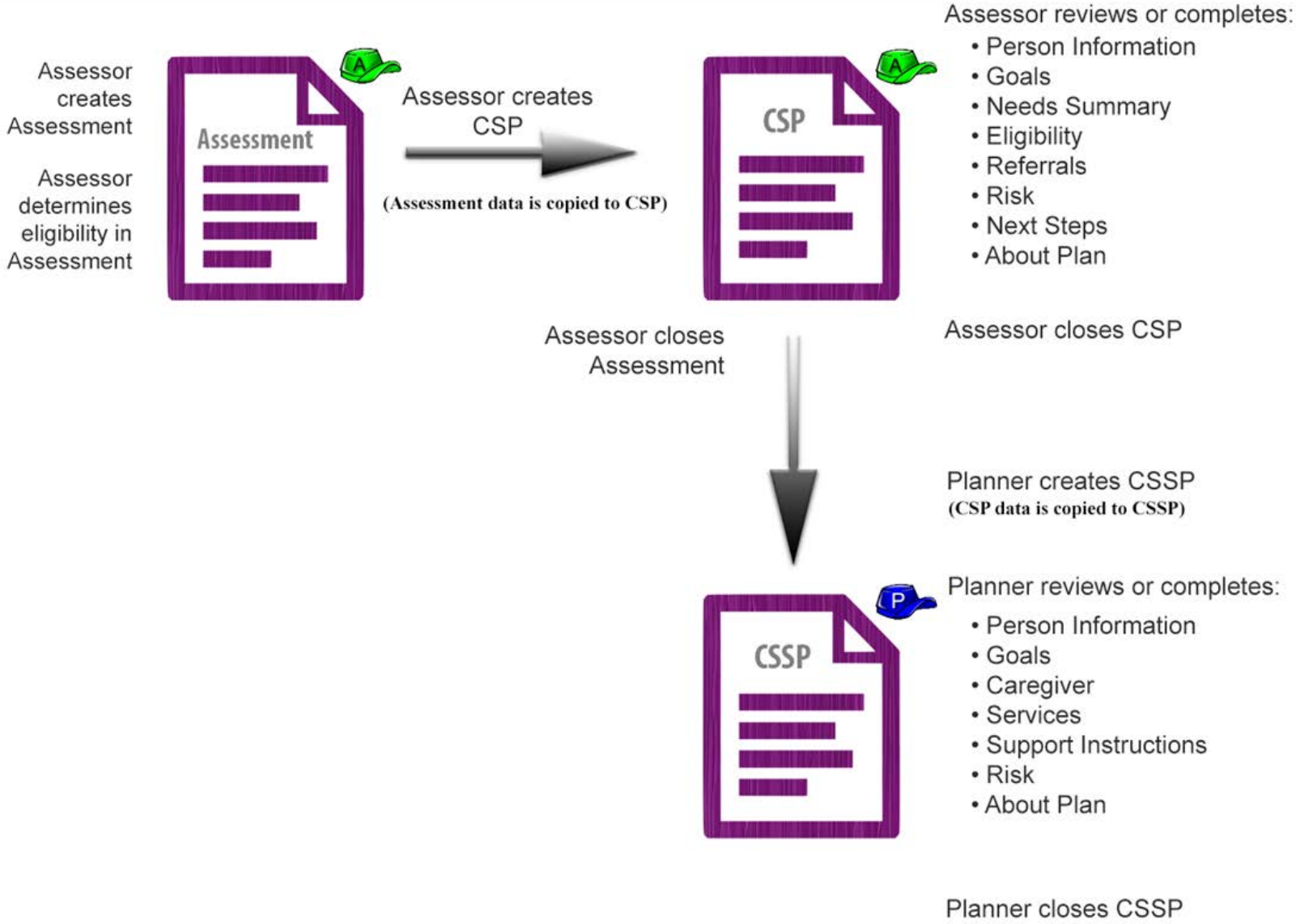
**Break: 10 minutes**

# Support Plan Training & Work Flow



# 4. Prepare your workflow

## 10,000 Foot View of The Assessment, CSP & CSSP



# 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

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

Name	PMI	Type/Status	ID	CM/CC	Plan Owner	
Grape Sara	Not Found	CSSP (Open)	1301		Teresa vanderBent	Create New CSSP View CSP Print CSSP Save

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




ABOUT PLAN

# Support Plan: tabs used to create a CSP and CSSP

Which tabs do you use to create the CSP? 

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




- Person Information
- Goals
- Needs Summary
- Eligibility
- Referrals
- Risk
- Next Steps
- About Plan

-  CSP
-  CSSP
-  CSP & CSSP

Which tabs do you use to create the CSSP? 

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

- Person Information
- Goals
- Caregiver
- Services
- Support Instructions
- Risk
- About Plan

-  CSP
-  CSSP
-  CSP & CSSP

# Place to Start: CSP Workflow



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

name	PMI	Type/Status	ID	CM/CC	Plan Owner
irape 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

- 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
Grape Sara	Not Found	CSSP (Open)	1301		Teresa vanderBent

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 it's 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
- Rates and case manager
- Service line: approve not authorize



# 5. Practice training and workflow

## 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

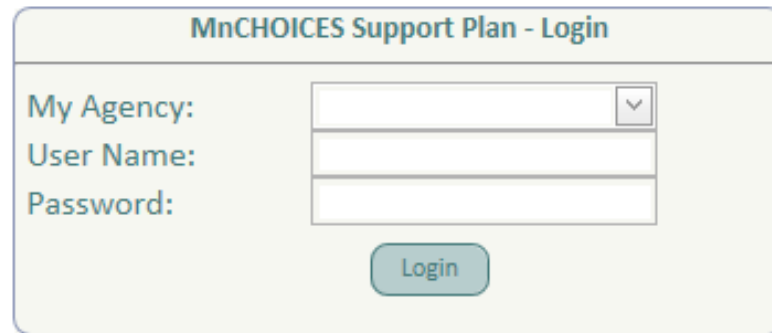
### Courtesy Reminder

- 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



The image shows a login form titled "MnCHOICES Support Plan - Login". It contains three input fields: "My Agency:" with a dropdown menu, "User Name:" with a text box, and "Password:" with a text box. Below the fields is a "Login" button.

## 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.
- 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 level in the Support Plan

# 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

- Assessor 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: A user name, password and name of a person with a reassessment
2. CSP: TrainLink site, companion document & the training modules
3. CSP: Instructions 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:

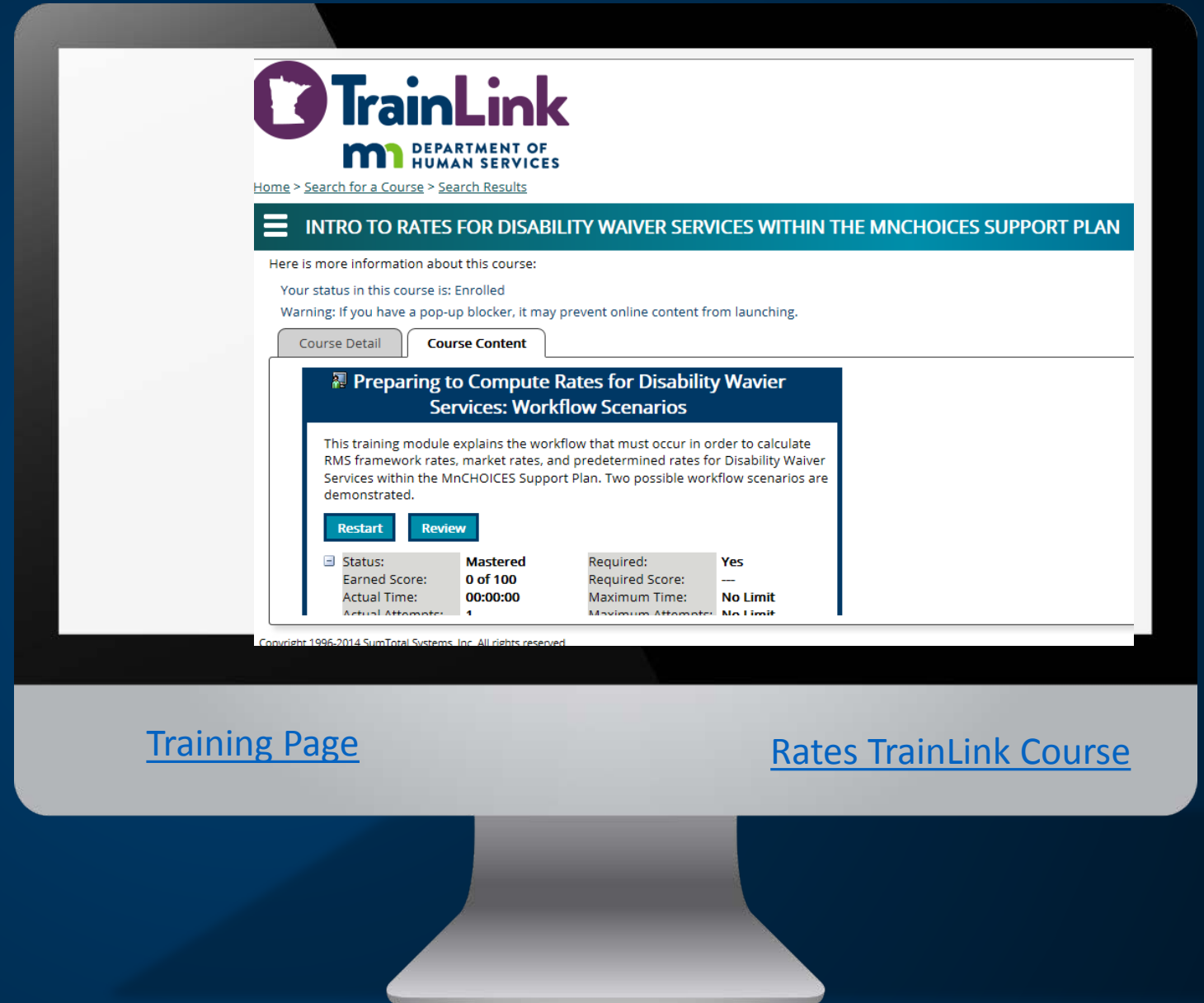
- User name and password from mentor
- Assign Rates at the person level
- Rates in a CSSP



# 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 level
- 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 level

- 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 Modules and User Manual

Training Module Creating a CSP and CSSP

[TrainLink Support Plan Training MNSP1000](#)

Use the MnCHOICES Support Plan Try It! Companion document for modules

- Try It! Exercises
- Use the Work Flow in Try It! Companion for CSP

 User Manual in MnCHOICES Support Plan (PROD & MTZ-SP)

## Demonstration of Support Plan Training

- Review Training modules creating a CSP & CSSP

## Demonstration of the Support Plan

- Create a rate at person level, Grape Sara
- Create a CSP, Strawberry Short Cake 12/12/1973
- Feature About Plan & My Plan



# Reminders in preparing for training

If case managers are also certified assessors then they can follow the document creation from assessment, CSP and CSSP.

In Counties where the Assessor creates the CSP and the case manager creates the CSSP, remember

- The MnCHOICES Assessment (PROD and MTZ-A) are only available to assessors
- Case manager has access only to the MnCHOICES Support Plan (PROD and MTZ-SP)
- CSSP is created when the assessment is closed and the CSP is closed

Ways to coordinate training and work flow

- Assessor completes and closes the assessment & CSP and in the About Plan chooses the case manager as secondary owner
- Mentor closes the assessment in MTZ-A, let the case manager create a CSP (in this model this isn't their role) and CSSP

# Reminders in preparing for training, cont.

For counties who have staff who only calculate rates

- Have rates staff create a rate at the person level

Last	First	Middle	Gender	DOB	SSN	PMI	Address	City	County of Residence	
Shortcake	Strawberry		F	9/7/1972			3344 Smile Street	Grand Rapids	Itasca	<a href="#">Create Plan</a>

- Have rates staff work with the case manager to coordinate creating rates in the Services tab of the CSSP

# Printing Plans for CSP and CSSP

## Phase 1

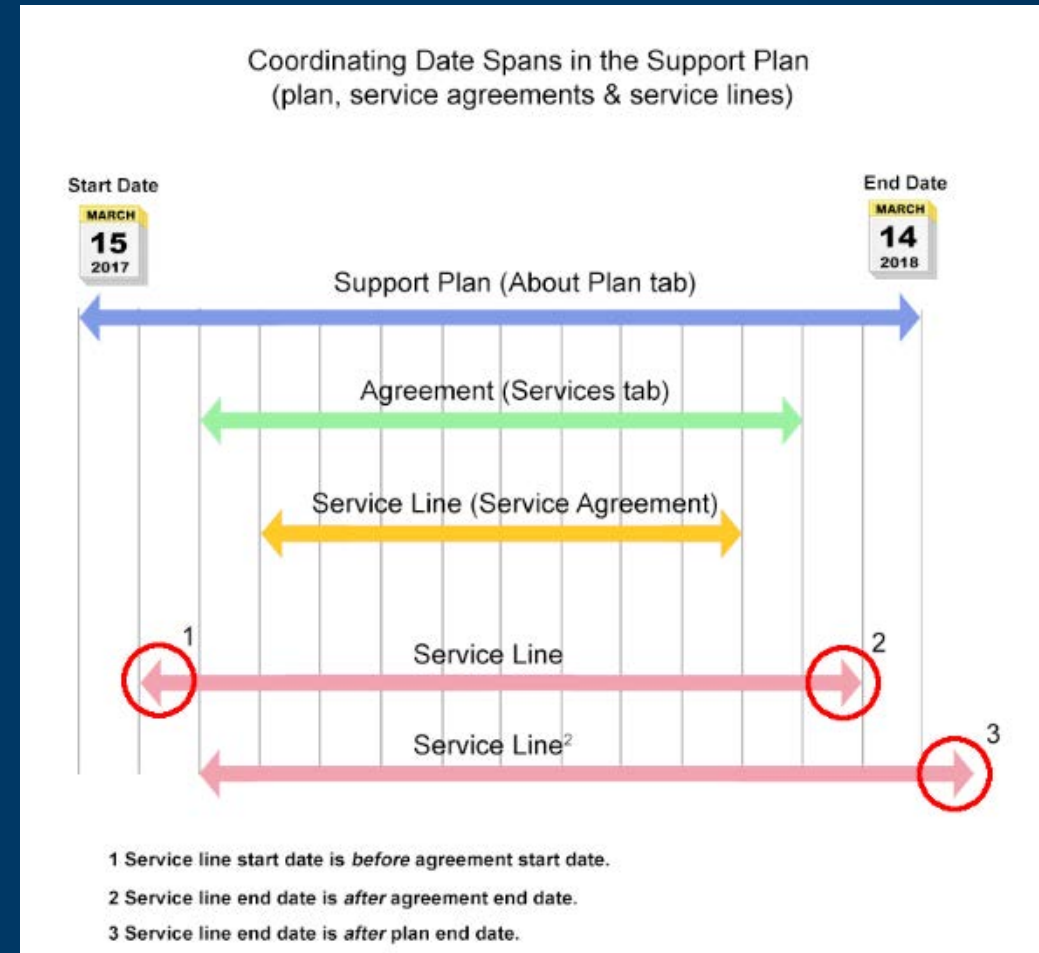
- Add Summary Page and remove all unnecessary spacing
- Completed for First Launch Group, March 2017

## Phase 2

- Re-create CSP and CSSP document
- Currently being sized

# Services Tab

- County of Residence
- Date Spans





Break: 10 minutes

## 6. 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 MMA 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 Orientation*

*MnCHOICES Mentor Alliance*

*MnCHOICES Help Desk*

*MnCHOICES Matters*

*MnCHOICES County Link*

*MnCHOICES Office Hours*



# MnCHOICES New Mentor Orientation

- Usually Spring of each year, most recently May 3, 2017
- Assessment Mentors & Support Plan Mentors
- Trains you to your role and provides support materials
- Support Plan Launch adding orientation(s) prior to launch



# MnCHOICES Mentors Alliance (MMA)

- Meets quarterly
- In St. Cloud
- 9 am – 3:30
- Sometimes Web-Ex
- Shortly before release
- Next May 22, 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



# Questions



**Thank you**

MnCHOICES Business & Rates Teams