



DEPARTMENT OF
HUMAN SERVICES



Support Plan Launch: Supervisor & Mentor Training

MnCHOICES Business & Rates Teams

Welcome & Introductions

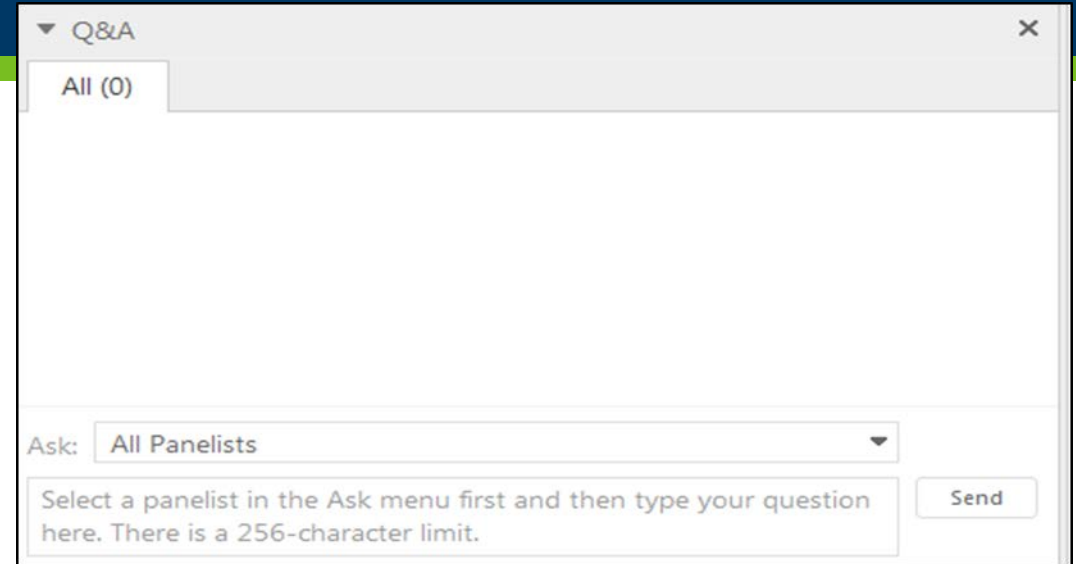
MnCHOICES

- Business Team Supervisor
- Support Plan Project Manager
- Support Plan Business Analysts
- Policy staff
- Operations staff



Housekeeping

- All participants are muted
- Do submit technical issues
 - Use the WebEx Q&A panel
- Type in your questions into Web-ex
- Can revisit this training on the webinar archive



The screenshot shows a WebEx Q&A panel window. At the top, it says "Q&A" with a close button. Below that, it says "All (0)". The main area is empty. At the bottom, there is an "Ask:" dropdown menu set to "All Panelists". Below the dropdown is a text input field with the placeholder text "Select a panelist in the Ask menu first and then type your question here. There is a 256-character limit." and a "Send" button.



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. Support Plan user access
4. Prepare your workflow
5. Practice training and workflow
6. Pre-launch and lessons learned from first launchers
7. Ongoing Support

Prepare for Training



1. Training Preparation

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



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

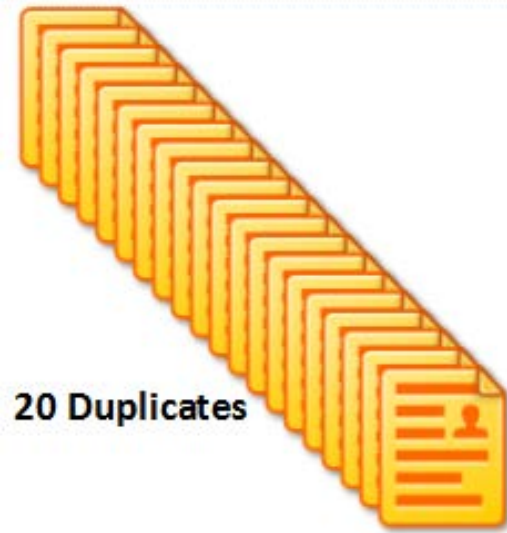


Duplicate assessment (reassessment)

- 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



Duplicates in the assignment queue



10 Assessors

Banana County 1, User BAN001



10 Case managers

Banana County 2, User BAN011

**Banana County reported 20 Support Plan users to MnCHOICES
40 Duplicates were created (20 users times 2 duplicates per user)**



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

MTZ-A Duplicate Slides

Duplicates in two assignment queues

Assignment not assessment queue

Mentors will assign duplicate reassessments in MTZ-A to users

MTZ-SP Training Preparation, 5: Duplicating an assessment, steps 4 and 5 (MnCHOICES CountyLink, Support Plan, Launch documents)

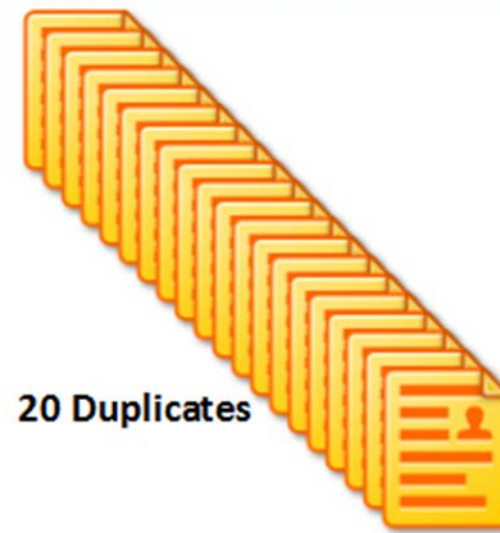


Coordinating Training Documents in MTZ-A: Assessors

Banana County 1, BAN001

Mentor assigns duplicates to assessors from the **assignment queue**

- BAN002 to BAN010 as user names
- Gives them “password”
- Users prepare their duplicates in MTZ-A



10 Assessors



Users prepare duplicates in MTZ-A

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**” this connects the data to the person
- Change the marital status (may default divorced) for your 17 year old
- 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



Duplicate Assessment Email



Good afternoon:

In preparation for Supervisor Mentor Training 42 duplicate assessments were created in MTZ-A for your County.

We ask you to **review the email below my signature.**

**Your duplicates sit in
Banana County 1, user BAN001 and
Banana County 2, user BAN011**

Have the mentor look in the **assignment queue for the each user group**. There should be many reassessments for fictitious people in the assignment queue. The fictitious people are 17 year old MALES

Next Steps for the Mentor:

1. Attend the Supervisor Mentor Training
2. Determine how your agency will assign reassessments to MTZ-A users and prepare documents for case managers. Mentors should train first and then develop a process for training your users.
3. Assign reassessments to mentors and assessors based on the process your agency has developed for training
4. Have the assessors/mentors preparer the assessment for training using [MTZ-SP Training Preparation](#),

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	



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



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

- User Names: Two Times reported users
- User Names are created through an automated system
- Ensures you have enough 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	





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

MnCHOICES Training Zone Assessment (MTZ-A) <https://mnchoices-train.dhs.state.mn.us/mnch/#/LoginPage>

- User name example: BAN001
- Users examples Intake, assessors

MnCHOICES Training Zone Support Plan (MTZ-SP)

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

- Provided at the Supervisor Mentor Training
- User name example: Banana1
- Users examples assessors, rates, case aides and case managers



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](#)



Using the Training Zone – Work Flow

Have your training mirror your agency work flow

- Assessors completes Assessment and CSP
- Planner/case manager does CSSP
- Rate calculations

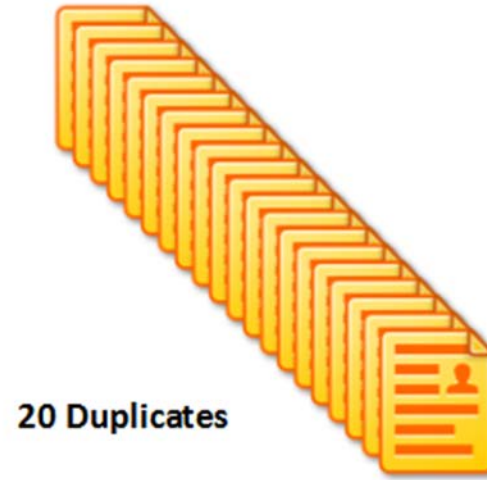
Try out your work flow in the Support plan and create discussion across roles



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





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
- 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



MnCHOICES County Link: Mentor Page

- Help Desk Link
- Office Hours Schedule
- Support Plan Known Issues
- Outage schedule



Outage Schedule

- Assessment & Support Plan Outages
- [2016-2017 Anticipated Assessment Release and Outage Schedule](#)
- How to read it
- What might change in the process



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. Support Plan user access

Submitted Onboarding sheets on 5/23/2017

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

Onboarding sheets can not be updated

All user access going forward go through SSAM



Login Credentials will be sent out directly to individual users in your agency near launch

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




Part 1: MnCHOICES Support Plan New User Notification



Fri 7/7/2017 9:48 AM

NO-REPLY-MNSP@STATE.MN.US

[SECURE]Part 1. Official MNCHOICES SUPPORT PLAN New User Notification

To  Ahmad, Usman (MNIT)

This is an automated e-mail message, please do not reply.

7/7/2017

Hello Test Test,

This post is to inform you of your new account on the MNCHOICES SUPPORT PLAN application as Support Plan access.

Please use these credentials when logging in:

User Id: TestUser

Password: Will be in a separate email immediately following this one.

You will be required to select a new password upon your first login.


You can access the MNCHOICES SUPPORT PLAN application by clicking this link: [HTTPS://MNCH-SUPPLAN.DHS.STATE.MN.US/](https://MNCH-SUPPLAN.DHS.STATE.MN.US/) (please save this in your favorites).


For more information about this account please contact DHS.SSISHelp@STATE.MN.US

Thank you,

Web Application Central Security Team

Part 2: Part 1: MnCHOICES Support Plan New User Notification

 Fri 7/7/2017 9:48 AM
NO-REPLY-MNSP@STATE.MN.US
[SECURE]Part 2. Official MNCHOICES SUPPORT PLAN New User Notification

To:  Ahmad, Usman (MNIT)

This is an automated e-mail message, please do not reply.

7/7/2017

Hello Test Test,

This post is to inform you of your new account on the MNCHOICES SUPPORT PLAN application as Support Plan access.

Please use these credentials when logging in:

User Id: Will be in a separate email immediately following this one.

Password: dHMWA0AV

You will be required to select a new password upon your first login.

You can access the MNCHOICES SUPPORT PLAN application by clicking this link: <HTTPS://MNCH-SUPPLAN.DHS.STATE.MN.US/> (please save this in your favorites).

For more information about this account please contact <DHS.SSISHELP@STATE.MN.US>

Thank you,

Web Application Central Security Team

SSAM: User Access for Production

User Maintenance

- Begins after your onboarding sheet has been sent to DHS
- All changes (additions, name changes, deleting users) through SSAM
- Agency security liaison submits any user additions or changes to the SSAM team
- Adding mentor as Security Liaison?



- Communications
- FAQs
- FAQs - Security Liaisons
- Only
- General Information
- User Documentation

Welcome to the System Security & Access Management (SSAM) Content Area

The SSAM Team receives your access requests and manages access for Human Services and MNsure systems (MAXIS, MEC², MMIS, METS, PRISM, SMI, EBT, etc.)

SSAM will use this space to share information with County and Tribal security liaisons.

This security area cannot be viewed by non-security staff.

Announcements

Name Change In MAXIS, MMIS, PRISM, etc. 2/28/2017 10:27 AM
 by Viere, Karen

County Security Liaisons have the ability to make name changes in the MAXIS system.

When you make a name change you need to **NOTIFY SSAM** so that the name can be updated in the other systems.

MAXIS system is the only system that County Security...

[Add new announcement](#)

Links

- [SSAM Unsuspend/Password Reset Request](#)
Use this form to request an unsuspend/password reset for EBT, MAXIS, MEC², MMIS, PRISM, InfoPac/eReports, SIR, RSA Key Fobs (PIN/WMS) and METS (formerly MNsure).
- [Service Delivery System Security Form \(DHS 4442\)](#)
Service Entry Supervisors - Use this form to request a new logon ID or to add, modify or terminate security access to EBT, ISDS, MAXIS, MEC², METS, MMIS, PRISM, SIR, SMI, InfoPac/eReports, Web Reports or eReports.
- [Security Liaison Handbook for Counties and Tribes](#)
Security Liaison Handbook for Counties and Tribes 2/28/2017
- [County Access and Course Instructions](#)
Information on how to access the Mandated Data Practices and Security Training and assessments for users from a MN County, a Tribe or a third party contractor.
- [Security Liaison Contact List](#)
Display the current list of security liaisons
- [MnCHOICES Support Plan Request and Authorization Form](#)
MnCHOICES Support Plan Request form used for user, team and agency additions and maintenance.

SSAM Form

SSAM Content Area

Links

MnCHOICES Support Plan Request and Authorization Form



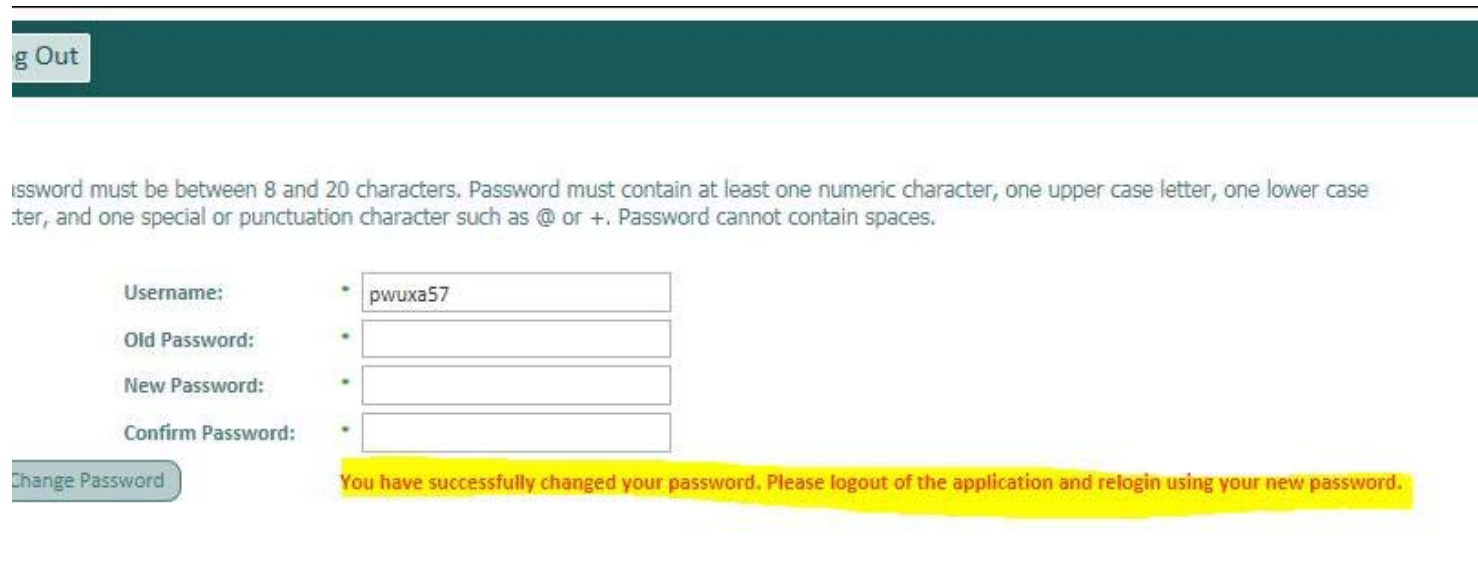
Adding a SSAM Security Liaison



- **Security Liaison Role:** Responsible for managing access on behalf of their agency
- **Who emails:** County human services director
- **Email request to:** SSAM@state.mn.us (MN_DHS_SSAM)
 - Notify SSAM your agency is appointing a Security Liaison
 - Include the person's full name and email address
- **Security Liaison will receive** Handbook, and be given SSAM access and other support materials

MnCHOICES Support Plan Passwords

- 1. Temporary passwords** Do not expire and at first use you will be forced to create a new password
- 2. Changing your password** Email immediately following acknowledging the change
- 3. Go to MnCHOICES Help Desk** for password resets



Log Out

Password must be between 8 and 20 characters. Password must contain at least one numeric character, one upper case letter, one lower case letter, and one special or punctuation character such as @ or +. Password cannot contain spaces.

Username:

Old Password:

New Password:

Confirm Password:

Change Password

You have successfully changed your password. Please logout of the application and relogin using your new password.



It's Time For A Break

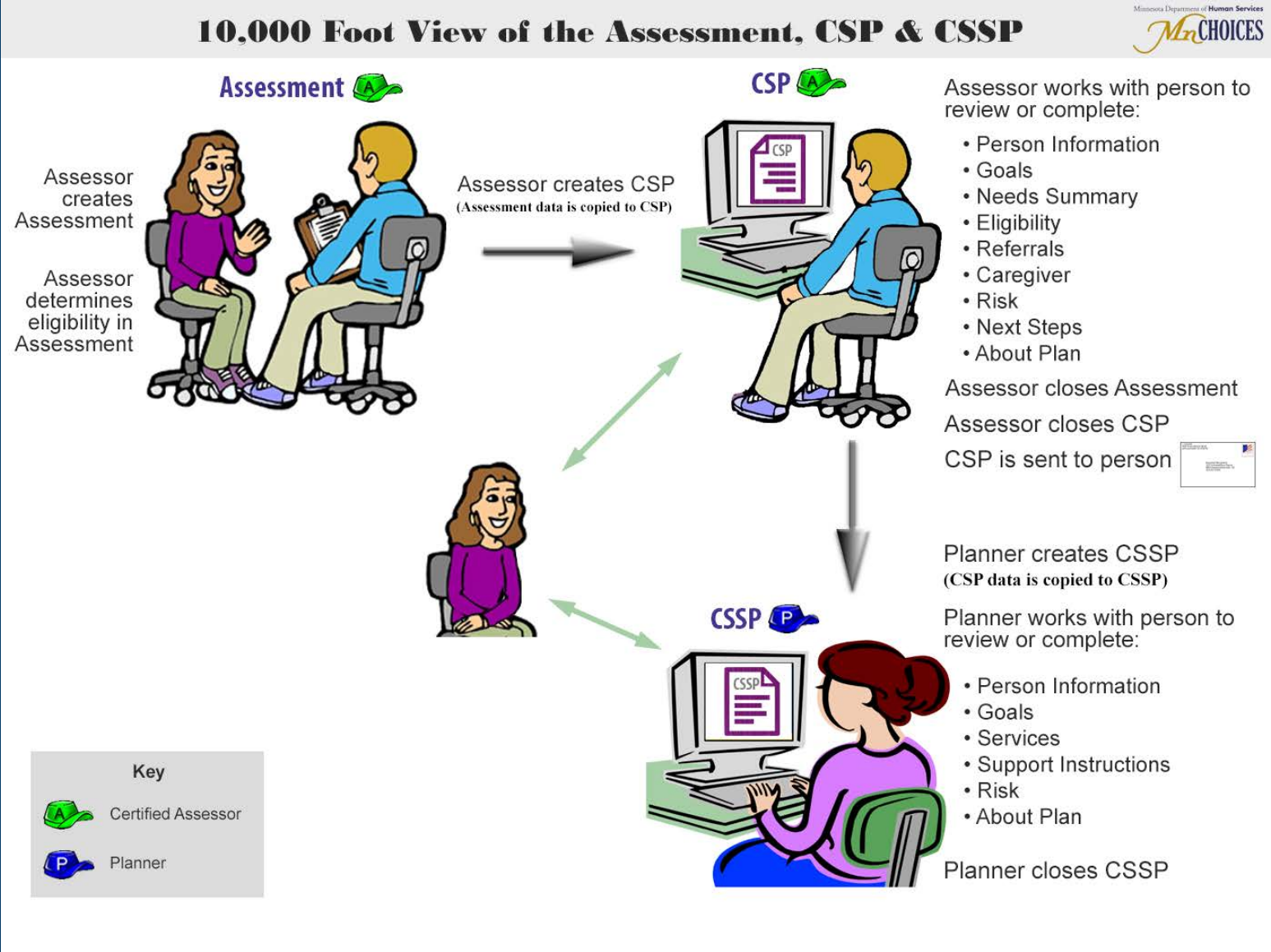


Break: 10 minutes

Support Plan Training & Work Flow



4. Prepare your workflow



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?




Which Support Plan tabs do I use to create a CSP/CSSP?

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




Key

	Certified Assessor
	Planner

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

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

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)

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

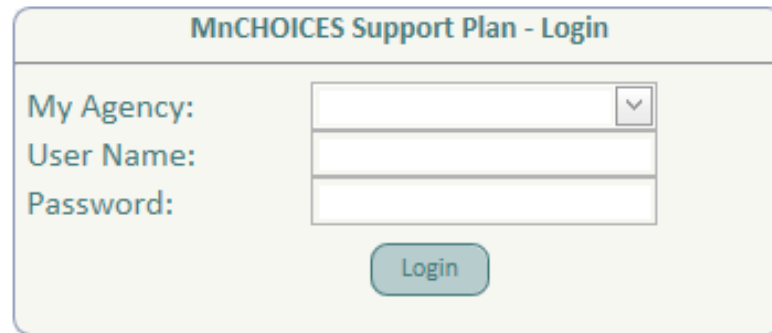
Courtesy Reminder

- 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:" which is a dropdown menu, "User Name:" which is a text box, and "Password:" which is a text box. Below the input 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, including services
- 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
- Service Tab: Unclick Show Rate so can set up services

2. Rates:

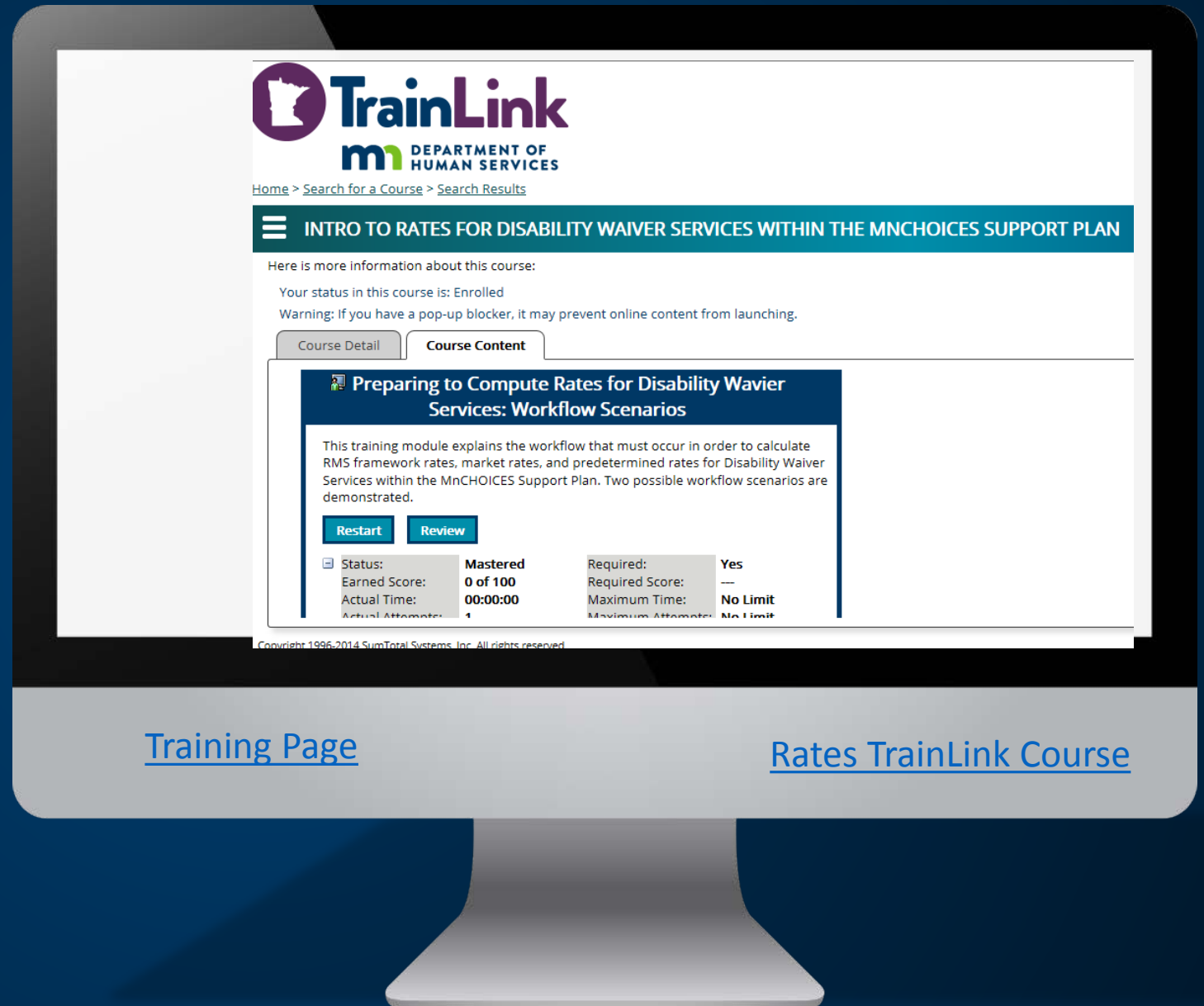
- User name and password from mentor
- Assign Rates at the person level
- Rates in a CSSP



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 level 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

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
 - About Plan – set the dates
 - Service Tab – create service agreement and service line

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

Service Agreement Report: MMIS

Data for MMIS Service Agreement

For: Timmy Triangle

User: tvander

PMI: Not Found

Document ID: 2029

Date of Birth: February 02, 2000

Agreement Status: Approved

Type: S-DD

Agreement Start-End Date: 04/01/17-01/31/18

ASA1

DATA FIELD NAME	DATA FIELD ABBREVIATION	DATA VALUE
Agreement Type	AGMT TYPE	S
Agreement Start and End Date	AGMT START/END DT	04/01/17/01/31/18
Recipient ID Number	RECIP ID	No Answer Provided
Birthdate	DOB (MMDDYYYY)	02022000
Case Manager Number	NBR	A001122334
Case Manager Name	NAME	Amy Alexander
Authorizing Signature	AUTH SIG(Y/N)	Y
Authorization Date	AUTH DATE	FIELD TBD

ASA2

DATA FIELD NAME	DATA FIELD ABBREVIATION	DATA VALUE
Reason Codes	STAT RSN	No Answer Provided
Send Recipient Letter	SEND RECIP LTR(Y/N)	Y
Send Provider Letter	SEND PROV LTR(Y/N)	Y
*SACTAD Number	SACTAD NBR	No Answer Provided
*AC Fee Payment Method	AC FEE PAYMENT METHOD	00
*AC Partial Payment	AC PARTIAL PAYMENT	0
*Override Location	OVR LOC	No Answer Provided
*AC Required Fee Amount	AC REQUIRED FEE AMOUNT	0
*AC Fee Effective Date	AC FEE EFFECTIVE DATE	No Answer Provided
Responsible Party	RESP PARTY(Y/N)	No Answer Provided
Fiscal Intermediary	FISCAL INT(Y/N)	Y
Lives with Responsible Party (Y/N)	LIVES WITH RESP PARTY(Y/N)	Y

Show Rate Button in Services tab of CSSP

Show Rate Button

- Services tab
- Service Agreements
- Service Line

Work Flow Example

Case manager unclicks
sets up line

Rates can click, run rates
and approve

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

CM/CC	Plan Owner	Agreement Type	Agreement Dates	County of Residence	Case Mix
	Teresa vanderBent	AC	11/14/2016 - 10/23/2017	Dakota	A

HCPC	<input type="checkbox"/>	Service	* E1399 Specialized Supplies & Equipment-Per Item	
	* Total Units	<input type="text"/>	Service Frequency	<input type="text"/>
	<input checked="" type="checkbox"/> Show Rate?			

Demonstration of Support Plan Training - Creating a CSP & CSSP

- Using MTZ-SP & Training together

Demonstration of the Support Plan

Feature

- About Plan, status, owners
- My Plan, different views
- Service Tab and Show rate button
- User Manual



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)

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,**

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

OR

- **Another Case Managers Option:** 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	Create Plan

- Case managers who do not calculate rates, unclick the Show Rate button
- Case manager create services in the service tab
- Rates staff could review and approve services
- Case manager coordinates 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
- Later in 2017



It's Time For A Break



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 the Support Plan
- 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 the Support Plan
- 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, to prepare for the Launch May 3 and June 29, 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 Sept. 6, 2017



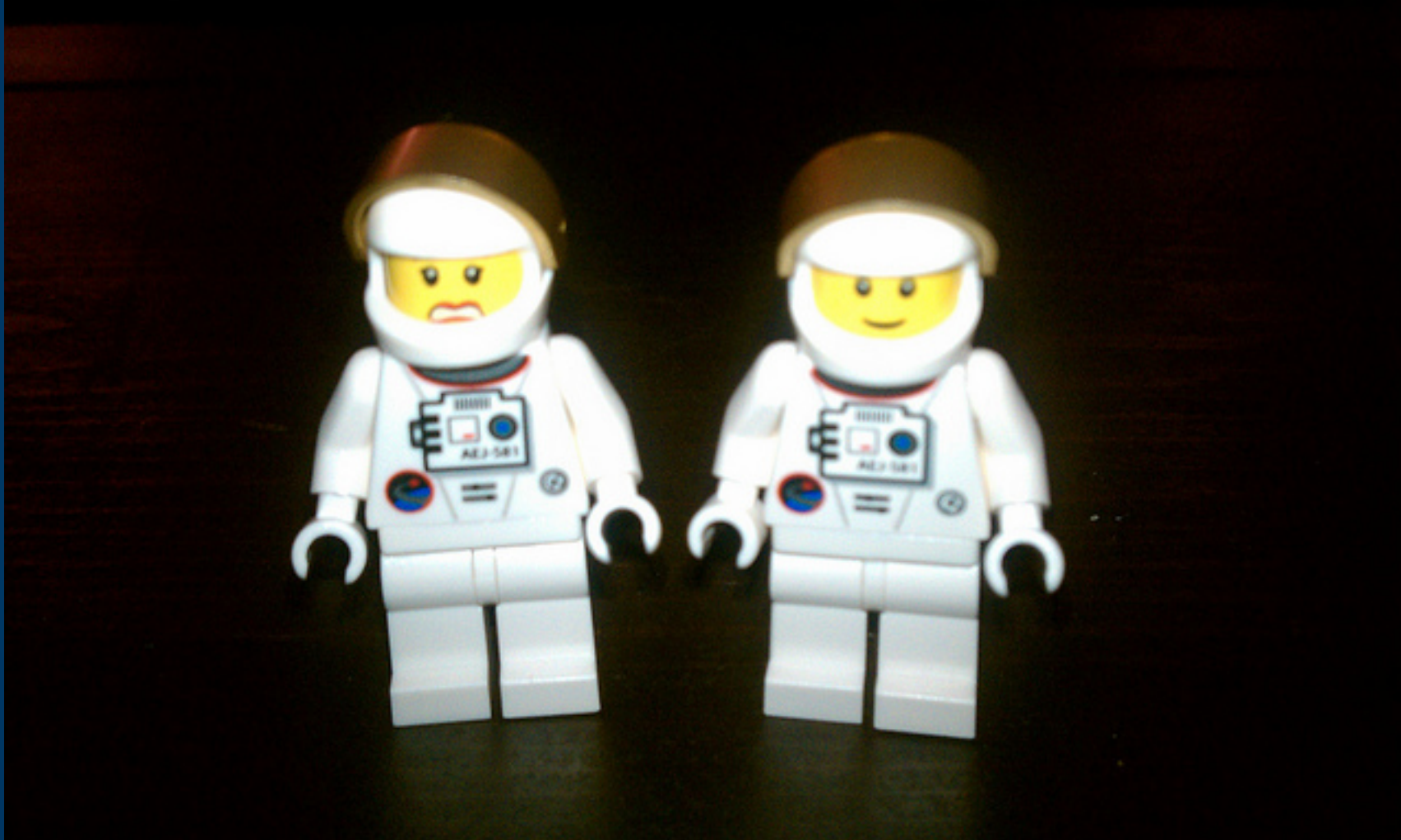
RMS Mentors in the MnCHOICES Support Plan

- 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



Lessons Learned: First Launchers



Lessons Learned: Efficiency

Overall they are pleased with the Support Plan

Saves between 30 minutes to 90 minutes per
CSP/CSSP

Your agency may want to consider investment in two
monitors so users can efficiently move between
Assessment and Support Plan



Lessons Learned: Training

- **Take the time to know it and use training.** Only as good the staff spend in creating a complete assessment, CSP and CSSP.
- **Training may seem simple but** go back and visit again when have questions
 - Learn access and navigation
 - Pick up tips included in it the second time
- **Training is best when the modules are used with MTZ-SP in real time**

Mentors meet with lead agency staff at least once a month while in MTZ-SP

- Some have walked through and created a CSP and CSSP with their staff
- All have given time for question and answers and best practices once a month

Lessons Learned: Work flow

- The Support Plan assists agencies to think about “ their work flow and ensure they know which “hat” they are wearing. “It has been a good exercise”.
- The assessor could review the CSP with the case manager **before closing** the CSP to ensure the all the information is there and clear.
- Print preview documents before they are closed.
- One lead agency has their account techs reviews the services created by the planner, they then run the rates and approve services.
- Some prefer running Rates in the Support Plan rather than SSIS.
- Like that the Service Agreement report follows MMIS entry.

Next Steps



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 Support Plan Launch