**MnCAT Step 3 – Part 3: Tool #1**

**Key Messages and Terms**

01-19-2016

1) Being a MnCHOICES Certified Assessor is a new role. The role is one of an “assessment and support planning specialist.”

2) DHS is given authority to train and certify assessors in Minn. Stat. §256B.0911. Certified Assessors are delegated agents of DHS to conduct needs assessments, determine service eligibility and develop support plans for people who need long-term services and supports.

3) As professionals, Certified Assessors are required to develop themselves around person-centered principles and practices. Professionals in the LTSS system are typically skilled at discerning, evaluating and assessing a person’s needs, challenges and barriers. However, they were not previously required to develop an equal expertise of person-centeredness. Their new role requires them to devote an equal effort to determining what is important for the person as well as considering what is important to the person by:
   - Listening to, understanding and verbally reflecting on what is important to the person;
   - Developing the skill to interpret each person's wants/needs into what they value, and help them attain “the life they seek to live”;
   - Incorporating what is important to the person into their professional assessment and support plan;
   - Documenting written goals, plans, case notes and summaries with person-centered ‘plain language’; and
   - Using their professional role to empower the person.

4) Certified Assessors, are responsible to conduct a structured, conversational and comprehensive interview. They set the tone, formulate the questions, manage the conversation, seek clarity & understanding, pace the person and manage the time.

5) The MnCHOICES certified assessor needs to be fully knowledgeable about the long term services and supports for which MnCHOICES determines eligibility. This knowledge needs to be sufficiently comprehensive to understand and discuss the array of services and programs, what each offers, their benefits/limitations, any prerequisites and what factors determine eligibility.

6) Certified Assessors develop a Community Support Plan (CSP) with the person and, if needed, consult with their multidisciplinary team. When required, Certified Assessors complete the Coordinated Services and Supports Plan (CSSP) to initiate the persons Service Agreement and begin delivery of services/supports. Make sure to emphasize the skills needed to develop the plan and complete all necessary documentation.

7) Another important role of a Certified Assessor, is to actively participate with other MnCHOICES Certified Assessors in multidisciplinary team discussions.

8) A MnCHOICES Certified Assessor improves their professional skills through continued learning, participation, consultation and practice.

9) Certified Assessors use MnCHOICES (the state web-based electronic assessment tool/application) to capture their assessment interview observations, findings and professional judgments along with the person’s story, preferences, strengths, stated needs as well as the person’s values, desires, and goals.

10) As a Certified Assessor, uses required DHS eDocs and other forms for documentation and signatures as mandated by current statute and policy. When released, Certified Assessors will use the MnCHOICES Support Plan application.

**Professional judgment/opinion** is derived from a learned understanding or knowledge of the topic area in question. Professional evaluates/considers known/valid criteria, guidelines and/or parameters to arrive at their ‘professional opinion’.

**Change** involves an ‘adaptive process’ for a person. People experience an emotional response to change that involves a process over time and usually touches upon the various stages of grief (denial, bargaining, anger, fear, sadness, and
It is important to move through process (versus being stuck in one or more stages); have a safe, supportive group/environment with whom to process, and honor your grief (letting go). Use metaphor of moving to new home...planned moves can involve excitement, anticipation of hopeful future that can mitigate the grief process of letting go of the old. However, person still needs to acknowledge and move through grief process. When move (change) is not planned, then person may experience heightened grief process, including more stress in acclimating to the new...making new “home”.

**Understanding our role as “delegated agents” of DHS for LTSS** includes the importance of DHS’s relationship with CMS (Centers for Medicare and Medicaid Services) and DHS (as the State Agency) bestowing their authority to Lead Agencies and Certified Assessors. Use the Quality Framework as a guide to what is important and valued in our roles. Quality measures are based on that framework and “our” plan (promise) to CMS which results in and shows up in our Waiver Reviews/audits.

**Understanding the MnCHOICES “tool”**

It is important for Certified Assessors to “make it your own” or “master” MnCHOICES. This requires familiarity, practice, and “owning” the flow of the interview. Each professional needs to know themselves and what kind of a learner they are...this will guide their approach to learning (studying) MnCHOICES.

- **MnCHOICES** is an electronic comprehensive assessment tool that *guides and defines* your professional assessment that:
  - As an electronic tool, poses certain challenges to those of us who are used to paper. We need to think of this tool as one that guides & defines our comprehensive professional assessment, NOT a FORM. Professional judgment and integrity is needed as the focus of conducting a comprehensive, person-centered interview; synthesizing information from various sources (sometimes conflicting sources), understanding the assessment questions/terminology in order to make the accurate selection....
  - Defines/lays out comprehensive categories (domains) you are to cover in your assessment interview.
  - Supports person-centered practice and provides evidence of our practice.

- **As “a tool that supports the professional,”** MnCHOICES enhances accuracy and calculates for you (use analogy of calculator): LOC, Case Mix, Home Care Rating, PCA Hours & Program/Service ‘eligibility’ (we know eligibility is a constellation of criteria, so not just one factor. And, often the people we serve equate eligibility with “I’ve got it”.) Point out that the assessor does not need to determine if “something” is a dependency – the rules will run against the data entered in MnCHOICES and determine this detail for you.
  - Function & Convenience factors:
    - Calculates: LOC, Case Mix, Home Care Rating, PCA hours, Program/Service ‘eligibility’
    - Prior assessment entries “copy over” as a starting point for next/future assessments; brings copy of most recent assessment or intake into “new” intake or assessment/reassessment document. You can then edit/update to reflect the person’s current situation
    - Printing: the Eligibility Summary, the full or specific domains of the Assessment, the Planning Summary, OBRA screens and LTC/DD/PCA screening document/service agreement information for MMIS data entry

- When developing MnCHOICES, three separate previously used assessments were incorporated: Because MnCHOICES incorporates the questions/elements from 3 separate program/policy areas, you need each other via your MDT to provide consultation/cross-training. Use metaphor of MnCHOICES as house that different specialty areas have moved into. They each bring their important/valued things as developed by their specialty group & with the understanding & clarity that comes from ‘growing up in a particular culture’. Not everyone outside of that culture interprets the question accurately. Often there is experiential knowledge implicit within the wording only understood by those who developed it. (When we are in the tool we will see examples of this....especially in Assessor Conclusions: ask ‘is that unfamiliar to any of you?’ Ask ‘who doesn’t know what that means?’ This is most notable between DD & LTC, but also some of the hospital level, BI, PCA, or behaviors.)