Support Plan
Try It!
Training Companion

5/5/2017
MnCHOICES Support Plan Training Guide

Contents

MnCHOICES Support Plan Training Guide ............................................................................................................................. 2

Introduction and instructions ..................................................................................................................................................... 4

Training preparation: .................................................................................................................................................................. 4

Courtesy please - Do not use another agency’s assessment in the Training Zone ................................................................. 4

Recommended training by role .................................................................................................................................................. 4

Suggested module order for Support Plan training ........................................................................................................... 5

Try It! - all............................................................................................................................................................................ 6

1. Getting ready for training ............................................................................................................................................... 6

2. Learning about the MnCHOICES Support Plan ........................................................................................................ 6

3. Logging in to the MnCHOICES Support Plan ........................................................................................................... 7

4. Searching for a person .................................................................................................................................................. 7

5. My Plans .................................................................................................................................................................. 8

6. Creating and reviewing a Rate Plan .......................................................................................................................... 8

Try It! – CSP ......................................................................................................................................................................... 8

7. Creating and viewing a Community Support Plan (CSP) .................................................................................................. 9

8. Person Information – Both CSP and CSSP ............................................................................................................... 9

9. Goals – CSP ............................................................................................................................................................ 10

10. Needs Summary - CSP ................................................................................................................................................ 10

11. Eligibility – CSP and CSSP .................................................................................................................................... 11

12. Referrals – CSP .................................................................................................................................................. 11

13. Risk – CSP and CSSP ................................................................................................................................................ 11

14. Next Steps – CSP ............................................................................................................................................... 12

15. About Plan –CSP and CSSP ................................................................................................................................ 12

16. Opening and Closing CSPs and CSSPs – CSP and CSSP ...................................................................................... 13

Try It! – CSSP ..................................................................................................................................................................... 14

17. Caregiver – CSSP ................................................................................................................................................ 14

18. Services and Service Agreements – CSSP ........................................................................................................... 15

19. Services: Adding Services – CSSP ........................................................................................................................ 15

20. Creating an EW Agreement ........................................................................................................................................ 17

21. Support Instructions – CSSP .................................................................................................................................. 18

22. Printing Documents - Rates, CSP and CSSP ........................................................................................................... 18
Workflow Terms ........................................................................................................................................................................... 19
Which tabs do you use to Create a CSP and CSSP?.................................................................................................................... 21
Which Tabs do you to create the CSP? ........................................................................................................................................ 21
Which tabs do you use to create the CSSP? .............................................................................................................................. 21
How do you know you have completed the CSP? CSP Checklist: ............................................................................................ 22
How do you know you have completed the CSSP? CSSP Checklist: ...................................................................................... 22
Support Plan Try It! Training Companion Document

Introduction and instructions
The Minnesota Department of Human Services, Disability Services Division, and the MnCHOICES team provide you with the following information to assist your access and navigation of the MNCHOICES Support Plan application:

- Support Plan training modules on TrainLink
- RMS training modules on TrainLink
- Try It! Training Companion
- Workflow
- Crosswalk: Assessment and Support Plan

This companion document provides users with:

- Try It! exercises. The Try It! feature gives you a chance to try what you learned in the training modules.
- Guidance on which modules you should complete, depending on your role (assessor or planning)
- A suggestion of the order users should take the training

Training preparation:
If you are an assessor, prepare your assessment in the MnCHOICES Assessment Training Zone by updating your assessment for the MnCAT 3 person you created:

- Add the level of detail you use for the assessment process so you get a true sense of what comes over to the Support Plan and where to find it.
- Go into the Assessment and zero out all of the required questions.
- Run Eligibility on your assessment.
- Do not close your assessment.

Courtesy please - Do not use another agency’s assessment in the Training Zone
1. The MnCHOICES Training Zone includes assessments that lead agency assessors have created in their MnCAT Step 3 training. There are not as many assessments as rates and planning staff. Using another agency’s assessment will limit that agency’s ability to train in the Support Plan.
2. Mentors will provide Support Plan users with directions for using the Training Zone.
3. Your agency has workflow for training in MTZ. All users will follow mentor instructions.
   - The CSP is completed first.
   - CSSP users will be notified when the CSP work is done so they can begin CSSP work in a specific CSP.
   - Rates users will follow mentor instructions as you create rates plans and service agreements following your agency workflow.

Recommended training by role
After each module heading is a designation based on the type of work users will do in the support plan: assessment, planning and rates work. All means it is useful for all users: CSP, CSSP and Rates.

If you will use the Support Plan in the role below, we suggest users follow the track indicated:

- Assessment: CSP Track
- Planning: CSSP Track
- Rate Plans: Rates and also take the Rates TrainLink modules
- Supervisor/Mentor: All modules to ensure you can provide super user support of your MnCHOICES users
Suggested module order for Support Plan training

1. Getting Ready for Training - All - required
2. Learning about the MnCHOICES Support Plan - All - required
3. Logging in to the MnCHOICES Support Plan – All
4. Searching for the Person - All
5. My Plans - All
6. Creating and Reviewing a Rate Plan – Rates and CSSP

The CSP and CSSP share several tabs. Please review the Workflow document for a place to start for knowing which tabs to complete in a CSP and/or CSSP and how you will know they are complete.

7. Creating and Viewing a Community Support Plan - CSP
8. Person Information – Both CSP and CSSP
9. Goals – CSP
10. Needs Summary – CSP
11. Eligibility – Both CSP and CSSP
12. Referrals - CSP
13. Risk – Both CSP and CSSP
14. Next Steps – CSP
15. About Plan – Both CSP and CSSP
16. Opening and Closing CSPs and CSSPs – Both CSP and CSSP
17. Caregiver – CSSP
18. Services and Service Agreements–CSSP
19. Services: Adding Services– CSSP
20. Creating an EW Agreement – CSSP
21. Support Instructions – CSSP
22. Printing Documents – Rates, CSP and CSSP
Try It! - all

1. Getting ready for training

What you will learn - Getting ready

Getting Ready for Training explains how to use the training features, and what to expect in each course. You will learn
- How to move through the training by using the buttons on the screen, or the letters on your keyboard
- How to use the Settings options
- About the “Try It!” feature to practice what you learn in the MnCHOICES Support Plan Training Zone
- About the Check Your Knowledge quiz and how to use the Help button

Try It! Getting ready for training

- Click the Try It! button in the training module. This will take you to the MnCHOICES Training Zone for the Support Plan.
- There is no need to log in now, but make sure you get the log-in instructions from your mentor before you move forward in the training.
- Please take a moment and read the security banner

• When you finish, log out and close the Support Plan browser and return to the training. Click the next button to continue.

2. Learning about the MnCHOICES Support Plan

What you will learn - Learning about the MnCHOICES Support Plan

After completing this lesson, you will know:
- Which plans are included in the MnCHOICES Support Plan
- Who can use the MnCHOICES Support Plan
- The basic functions and features, along with some new terms to learn
- How the MnCHOICES Assessment and MnCHOICES Support Plan work together
Try It! – Learning about the MnCHOICES Support Plan

• None

3. Logging in to the MnCHOICES Support Plan

What you will learn - Logging in to the MnCHOICES Support Plan
In this module you will learn how to log in to the MnCHOICES Support Plan, how to manage your password, how to create a strong password and how to log out of the application.

Try It! Logging into the MnCHOICES Support Plan
• Click the Try It! button at the top of the screen. It will bring you to the MnCHOICES Support Plan Training Zone.
• Log in to the Training Zone:
  ▪ Choose the agency you work for in the My Agency field. The agency will be your county if you are a county employee and contracted agency if you work for a contracted agency. You will be prompted to choose the lead agency you work for when you create a CSP/SSSP or rate plan for a specific person.
  ▪ Enter your user name and password. In the drop-down menu, choose the agency you are to working for.
  ▪ After you log in, you will be on the Search page.
• Click the Log Out tab on the Main Menu bar to log out of the Training Zone and close the Training Zone browser window to return to the training.

4. Searching for a person

What you will learn – Searching for a person
You will discover different ways to search for a person, options for using the person-search function and how to find assessments in the MnCHOICES Training Zone to help you create plans.

Try It! Searching for a person
• Click the Try It! button at the top of the screen. It will bring you to the MnCHOICES Support Plan Training Zone.
• Log into the Training Zone.
• In the search area, Starts with is already chosen as the default search option. Search for the person you were given by your mentor.
• Use multiple search options
  o Try searching using only the first two letters of the first and last name. Click the search button and review the results.
  o Change to Exact Match, click Search and note the results. If no person was found, click OK and try other combinations of the same name in the search criteria and use Starts With.
  o Add a birth date and see if the results change.
  o If you never find results for the name you chose, consider using a different name and try again.
  o When you are satisfied that you found the person you are looking for, click the plus sign next to his or her name to see what documents currently exist for the person.
• Re-sort column headers by clicking on a column header and dragging it to a different column location.
• Choose at least one document to open and review: If a a blue underlined document ID number exists, click to view information about the person.
• Click Log Out, close the browser window or tab with the Training Zone, and return to the training module.
5. My Plans

**What you will learn – My Plans**

The best way to describe the My Plans tab is that it is an electronic file cabinet that allows you to locate and manage your work with the ease of technology. In this module you will learn about what you will find in My Plans along with how it can help you organize and access your work.

In this tab you are viewing plans assigned to you as the plan owner, for the agency you logged in under. It includes plans that have a status of open and it will include all plan types: CSPs, CSSPs and Rate plans.

**Try It! My Plans**

- Click the Try It! button.
- Log in to the MnCHOICES Support Plan.
- Click the My Plans tab in the main menu.
- Because you may not have had plans assigned to you, your My Plans grid probably won’t have much data in it.
- Even with one plan, you can explore the options.
- Change the view to My Agency, which should give you more data to view and sort.
- Click the Log Out tab on the Main Menu bar to log out of the Training Zone.
- Close the Training browser window and return to the training.

6. Creating and reviewing a Rate Plan

**What you will learn – Creating and reviewing a Rate Plan**

In this module you will learn how to create a Rate Plan and how to view an existing one.

**Try It! Creating and Reviewing a Rate Plan**

- Click the Try It! button.
- Log in to MnSP.
- Search for your person.
- Create Rate Plan: When you locate that person, in the column on the far right of the table, click Create Plan.
- Follow the prompts to select the agency on whose behalf you are working and click the Next button.
- Click the Create a Rate Plan button.
- You will know you created a Rate Plan by checking the Type/Status in the header.
- Write down the Rate ID number for the Rate Plan you just created. It is located on the white bar under ID.
- Enter it here for your future reference:
- Go the Search page, enter the Rate Plan ID number in the Open Plan number field.
- Click Go!
- Follow the onscreen prompts to identify the agency you are doing the work for and click the Next button. This takes you to the Rate Plan you created.
- Click the Log Out tab on the Main Menu bar to log out of the Training Zone.
- Close the Training browser window and return to the training.

**Try It! – CSP**

The CSP and CSSP have several tabs in common. Stop your training and review the Workflow section of this companion document.
7. Creating and viewing a Community Support Plan (CSP)
In this module you will review some background information about the CSP along with learning who creates and edits a CSP, and some of the functions and features associated with a CSP.

What you will learn - Creating and viewing a Community Support Plan (CSP)
Statute requires that the CSP must be given to the person within 40 calendar days after the assessment visit.

To create the CSP in the Support Plan you must do the following in the MnCHOICES Assessment:
- Have an assessment with the status of open.
- The eligibility rules must have been run at least once in the open assessment.
- The certified assessor who conducts the assessment creates and completes the CSP.
- You can only create a CSP for the most recent assessment.
- **Do not close an assessment before creating a CSP.** Keeping the assessment open until CSP is completed is important. If you close the assessment, you will be unable to edit the content carried over from the assessment into the CSP.
- The assessor may continue to work in the assessment while the CSP is open.

Try It! Creating and viewing a Community Support Plan
- Click the Try It! button and log in to the Support Plan Training Zone.
- From the Search screen, find the person provided by your mentor.
- Click the plus sign to the left of the person’s name, then click the Create Plan link in the far right column of the new grid that appeared.
- Select that agency in the dialog box drop down and click Next.
- Click the Create CSP button. It may take several seconds to load.
- You just created a CSP. The appearance of the tab you are currently working in will be white.
- The header shows the Type/Status of the CSP is Open.
- Note the CSP document ID number here:
- Return to the Search tab and search by the document ID number in the Open Plan # field to locate and open the CSP.
- Go to the My Plans page and choose the different options for View and Document Type.
- Click the Log Out tab on the Main Menu bar to log out of the Training Zone and return to the training.

8. Person Information – Both CSP and CSSP

What you will learn - Person Information tab
In the Person Information module you will learn about the Support Plan’s Person Information tab, including the data that is contained in this tab, where the data comes from, editable data and how to edit.

Try It! Person Information
- Click the Try It! button to open the Support Plan Training Zone.
- Log in, find and open the CSP or CSSP for your person by clicking to the underlined document ID number to the left of the person’s name.
- Click the Person Information tab.
- Explore each section of the Person Information tab by opening (click on plus sign) and closing them (click on the minus sign).
- Change and add information.
- Observe sections where information can’t be edited in the Support Plan.
In some sections, you will see questions and answers from the assessment. These are auto-filled from the MnCHOICES Assessment Application. Click the Save button and then click log out. Important: If a screen has a save button, use it. Otherwise, your work will not be saved.

9. Goals – CSP

What you will learn - Goals tab
You will learn about the Goals tab in the Support Plan, including where the information in the Goals tab comes from, how to add one or more goals for your person, changing the status of a goal and deleting a goal.

The Goals tab consists of three parts. The table at the top of the screen contains information copied over from the assessment to inform the plan about what is important to the person.

The second table is a list of the person’s short- and long-term goals.

The third part of the Goals page is the tool you use to add new goals to the plan.

The assessor will want to review the content of the Goals section to ensure the content is written for the person receiving the plan.

Try It - Goals
- Click the Try It! button to open the Support Plan Training Zone.
- Log in and open the CSP for your person.
- Click the Goals tab. Review the information carried over from the assessment. The information you collected in the assessment appears in a table for your use in creating goals. The actual goals for the person are located in the Short- and Long-Term Goals section. The goals are not auto-populated.
- Add three goals for your person and review them in the Short- and Long-Term Goals table.
  a. If you know the number of your provider, enter the NPI number.
  b. Pick a Frequency of Reporting option.
- Rearrange the columns in the Goals table.
- Change the status of a goal.
- Delete and re-enter a goal.
- Click the Log Out tab on the Main Menu bar to log out of the Training Zone and return to this training module.

10. Needs Summary - CSP

What you will learn - Needs Summary tab
You will learn where the data in the Needs Summary tab comes from, the importance of the information in this tab, how to use the tables and how to add, update and save data in the Needs Summary.

The Needs Summary tab provides one location in the Support Plan to reference all of the person’s needs identified and documented during the assessment. Only information documented in the assessment is displayed in the Needs Summary. There are many options that can be checked in the assessment related to strengths and challenges. But, only the options that are actually checked are brought over to the support plan.

Data from the Person Information and Assessor Conclusions domains are not part of the Needs Summary.

Also, the Psychosocial and Memory and Cognition domains are combined into one section in the Needs Summary.

Try It! Needs Summary
- Log in to the MnCHOICES Support Plan Training Zone.
- Open your person’s CSP.
- Open the Needs Summary tab.
Open and explore each section.
Go into MTZ for the Assessment and make some changes to the Needs Summary details, and run eligibility.
Go back into the MTZ for the Support Plan and review the changes in the Needs Summary.
Change the order of the sections.
Click the Log Out tab on the Main Menu bar to log out of the Training Zone and return to this training module.

11. Eligibility – CSP and CSSP

What you will learn - Eligibility tab
You will learn where the data in the Eligibility tab comes from, how to add or update the data, the overall purpose of the tab and how to access and navigate within the Eligibility tab.

Try It! Eligibility
- Click the Try It! button on your screen.
- Log in to the MnCHOICES Support Plan and find your person.
- Open the CSP or CSSP for your person.
- Click the Eligibility tab in the Plan menu.
- When the Eligibility tab opens, explore all the comprehensive information provided.
- Click the Log Out tab on the Main Menu bar to log out of the Training Zone and return to this training module.

12. Referrals – CSP

What you will learn – Referrals tab
In this session you will learn where the data in the Referrals tab comes from, how to add to or update the data, the overall purpose of the tab and how to access and navigate within the Referrals tab. You will find a list of the MnCHOICES Assessment domains from Quality of Life through the Care Giver domain. The Referrals tab represents exactly what is documented in the last question group of most domains of the MnCHOICES Assessment. The only way to add to or update the data is to access the Assessment and make the edits there. As long as the Assessment is open, the certified assessor can log in to the Assessment and make edits.

Try It! Referrals
- Log in to the MnCHOICES Support Plan.
- Open the CSP or CSSP for your person.
- Click the Referrals tab in the Plan menu.
- When the Referrals tab opens, explore all the information provided.
- Go into the MNCHOICES Assessment last question group and review the information in it.
- Revise the assessment information, taking into consideration that the language used in this section will print into the person’s CSP. Make any edits you deem necessary to make the referrals person-centered.
- Click the Log Out tab on the Main Menu bar to log out of the Training Zone and return to this training module.

13. Risk – CSP and CSSP

What you will learn – Risk tab
You will learn how the data in the Risk tab of the Support Plan is entered and where it comes from, the elements within the Risk tab and how to use each of them. The Risk tab includes three sections: Health and Safety, Risk Mitigation Plan and Emergency and Backup Plans.

Emergency and Back Up Plans: The assessor should fully complete this section for those people who are not going on a public program, and will therefore not receive a CSSP.
The assessor will want to review the content of the Risks section to ensure the content is written for the person receiving the plan.

Remember to click the save button to ensure you retain your work.

Try It! Risk
- Click the Try It! button at the top of the screen. It opens a new browser window and brings you to the MnCHOICES Training Zone.
- Log in and search for your person.
- Open the CSP for your person.
- Locate and click the Risk tab.
- Open each of the three sections and explore each section. The assessor can type in the text boxes in each section. The comments in the box labeled "How will health and safety issues be addressed?" will print in the CSP.
- If you are an assessor, complete and edit this section. Don’t forget to click Save when you are finished.
- If you are the designated planner, explore the options but refrain from working in the CSP.
- Click the Log Out tab on the Main Menu bar to log out of the Training Zone and return to this training module.

14. Next Steps – CSP
What you will learn – Next Steps tab
You will learn about the components of the Next Steps tab, how to navigate and use the tab along with the purpose of the tab. Next Steps includes a set of three options. The certified assessor uses these options. They inform the person who was assessed about what the next steps are in the planning process. It is part of the CSP created by the certified assessor and sent to the person. Next Steps explains to the person what happens after the assessment is over. It becomes the guide for his or her future. Information in Next Steps is printed on the person’s CSP.

The assessor will want to review the content of the Next Steps section to ensure the content is written for the person receiving the plan.

Remember to click the save button or your work will not be saved.

Try It! Next Steps
- Click the Try It! button on your screen.
- Log in to the MnCHOICES Support Plan and open the CSP for your person.
- Click the Next Steps tab in the Plan menu.
- When the Next Steps tab opens, explore the options.
- If you are the assessor, complete this document to prepare it for the CSP. Don’t forget to click Save when you are finished.
- If you are the designated planner, explore the options but refrain from working in this document.
- Click the Log Out tab on the Main Menu bar to log out of the Training Zone and return to this training module.

15. About Plan – CSP and CSSP
What you will learn – About Plan
In this session you will learn about changing a document’s status, the plan’s start and end dates, plan notes and assignments.

Try It! About Plan
- Log in to the Support Plan Training Zone.
- Open a CSP or CSSP and click the About Plan tab.
- Choose the start and end date. This sets the date span of your plan. Your service agreement will need to be between these dates. The plan’s date span does not appear above the service agreement when you create it.
You may need to write it down. For the CSP, the default date is the assessment date. For the CSSP, the default date is the date of the CSP.

- Change the Plan’s Status from Open to Complete. Take a moment and read the workflow section below for the definition of complete.
- Click Save. Notice that the Notes fields and Assignment sections are no longer editable.
- Change the Status back to Open and click Save.
- When you have finished, log out, close the Support Plan browser window or tab, return to the training and click the Next button to continue.

16. Opening and Closing CSPs and CSSPs – CSP and CSSP

*What you will learn – Opening and Closing CSPs and CSSPs*

In this session you will learn about the different ways to open a CSP, how to close a CSP, how to create and close a new CSSP and how to create a new CSSP from an existing CSSP.

*Try It! Opening and Closing CSPs and CSSPs*

- Use the person search to find your CSP.
- Use the My Plans tab to find a CSP.
- Use the ID number of the CSP to search for the CSP in the Search tab.
- If you are an assessor, prepare your assessment and CSP to be closed.
  - Preparing to close your assessment and CSP: Before you, the assessor, close the CSP, you may want to review the content of the following to ensure it is written for the person receiving the plan.
    - Review these sections in the CSP:
      - Goals
      - Risk
      - Next Steps
    - Any changes to the following require you return to the open assessment in the MNCHOICES Assessment application and make the needed changes:
      - What’s Important to the person
      - Referrals
      - Support Plan Implications
  - When you return to the Support Plan and reopen the CSP you will see the changes have been made.
  - To close a CSP, click the About Plan tab, change the Status to Closed, and click the Save button. Remember the assessment must be closed in order to close the CSP.
  - If any error messages come up, you will need to correct the errors before you can close the CSP.
  - It is important to remember that once the CSP is closed, it can no longer be edited.
- Assessor, notify your designated planner(s) that the CSP is closed.
- Designated Planners create a CSSP.
- Locate the closed CSP provided by the assessor. Click on the CSP so the CSP tabs appear.
- To create a CSSP, click View CSSP in the upper right hand corner of the screen. The white header will show CSSP in Type and Open in Status.
- Save the CSSP and search for it two ways:
  - Go to the search tab. Search for your person and find the CSSP. Open it for the Search area.
  - Go to My Plans and find the CSSP.
- Go to the About Plan tab and view your options for CSSP (Open, Complete and Pending). Do not close the document as you will need it for future training.
- When you have finished, log out, close the Support Plan browser window or Tab, return to the training and click the Next button to continue.
Try It! – CSSP

The CSP and CSSP have several tabs in common. Stop your training and review the Workflow section of this companion document.

17. Caregiver – CSSP

What you will learn – Caregiver tab
You will learn where the data in the Caregiver tab comes from, how to add to or update the data, the overall purpose of the tab and how to access and navigate within the Caregiver tab.

All the assessment information documented in the unpaid caregiver table, along with all the information gathered from a discussion with the primary informal caregiver, if there is one, is copied over to the Support Plan.

To edit: Data in the Caregiver tab can only be edited while both the assessment and the CSP have a status of open. Once the assessment is closed, the data in the Caregiver tab is locked and no additional edits can be made.

Comment boxes: To track how the needs of the caregiver are addressed in the support plan, there is a comment box that can be added to and edited. The comments box can be edited in the CSP and CSSP.

- Use in CSP: The assessor develops in the CSP to document the options discussed and how they will address the needs of the caregiver.
- Use in CSSP: The case manager reviews proposals for how to meet the needs of the caregiver and updates the information based on final decisions and choices of the person and the caregiver.

Try It! Caregiver tab

- Click the Try it! button on your screen.
- Log in to the MnCHOICES Support Plan.
- Follow the instructions for your portion of the Support Plan Work.
- If you are an assessor, open the CSP and
  - Review the caregiver information.
  - Go to the MnCHOICES Assessment for your person and make any edits and then return to the Support Plan.
  - Look up the CSP with the changes you made.
  - Document the options to address the needs of the caregiver in the comments section.
- If you are a planner working in the CSSP:
  - Use the person search to locate your person.
  - Find the CSSP for the person you were assigned.
  - Click on the CSSP for that person.
  - If a CSSP is not listed in the person’s records, the CSSP does not exist.
  - If the assessment and/or CSP are open, contact the assessor who owns the plan and ask him or her to close the assessment and CSP so you can begin your work.
  - Do not create a CSSP from an open CSP without consulting the assessor. When a CSSP is created, the CSP is forced to close and the assessor will not be able to complete his or her CSP work.
  - Do not choose the View CSSP button in the CSP document itself unless instructed to. It will create a CSSP and close the CSP.
  - If the CSSP exists, go to the Caregiver section and explore all the information provided.
  - Read the assessor’s notes.
  - Complete any notes you need for the person’s CSSP.
- Click the Log Out tab on the Main Menu bar to log out of the Training Zone and return to this training module.
18. Services and Service Agreements – CSSP

What you will learn – Services and Service Agreements
How to create a Service Agreement. A service agreement is used to identify all services in a plan whether the service is paid with public funds or not.

Try It! Services and Service Agreements
- Log in to the MnCHOICES Support Plan Training Zone.
- If you are a designated planner, open your person’s CSSP or Rate Plan.
- Click the Services tab, in the CSSP menu. For Rates Plan training refer to Rate Training modules.
- Click add Agreement.
- Be sure to choose county of residence or you will get a message when you go to create a service line and you will lose the information you have entered.
- Complete this agreement.
- The Services tab is a succession of service agreements and services lines. CSP/CSSP plan dates are set in the About Plan page. The Service Agreement and Services lines are nested inside the plan dates.

19. Services: Adding Services – CSSP

What you will learn – Services: Adding Services
This module explores how to add services to a Service Agreement in a Rate Plan or CSSP. The Services tab is a focal point in the MnCHOICES Support Plan application. It’s where the options the person wants to pursue are finalized, rates are calculated and data prepared to be entered into MMIS. You will explore how to add services to a Service Agreement in a Rate Plan or CSSP.

Try It! Services: Adding Services
- Log in to the MnCHOICES Support Plan Training Zone.
- Search for your person.
- If your role will include creating services in a Rate Plan, then:
  - Create a Rate Plan from the person, following the Rate Plan module. If a Rate Plan has been created, click on the Rate Plan to open it.
  - Create service line in the Rate Plan.
  - Choose Add Agreement.
  - Complete the details in this section, paying close attention to these two items:
    - Write down the service agreement date range. All services will need to be entered between these dates. You will not see the date range in your service line. This will decrease error messages.
    - Make sure you choose the County of Residence – You cannot save the service line without it entered here.
  - Click the Add Service button and add a service to the person’s Service Agreement. This will automatically save your service agreement and open up a service line. If you use the Save Agreement, you will need to use Add Service.
  - Create detail in your service.
  - Save the service and close the Service Details screen.
  - Create and save at least three service lines for this service agreement, using the Add Service button.
If you click on the plus on your service agreement, it will list each service line and you will see the edit button for the service line.

Choose a service line using Edit and make a change to the service and save it.

Choose a service line and use the delete button by first clicking on edit and then the delete in the service line.

Go back to the service agreement and click the plus. See that the service agreement you deleted has been removed.

- If you provide planning, open the person’s CSSP to create a service in the Service Agreement.
  - If you are in a CSSP, open the Services tab.
  - Choose Add Agreement.
  - Complete the details in this section, paying close attention to these two items:
    - Write down the service agreement date range. All services will need to be entered between these date ranges. You will not see the date range in your service line. This will decrease error messages.
    - Make sure you choose the County of Residence – You cannot save the service line without it entered here.
  - Click the Add Service button, and add a service to the person’s Service Agreement. This will automatically save your Service Agreement and open up a service line. If you use Save Agreement, you will need to use Add Service.
  - Create detail in your service.
  - Save the service and close the Service Details screen.
  - Create and save at least three service lines for this service agreement using the Add Service button.
  - If you click on the plus on your Service Agreement, it will list each service line. You will see the edit button for the service line.
  - Choose a service line using Edit and make a change to the service and save it.
  - Choose a service line and use the delete button by first clicking on edit and then the delete in the service line.
  - Go back to the service agreement and click the plus. See that the Service Agreement you deleted has been removed.

- When you have finished, log out, close the Support Plan browser and return to the training. Then, click the Next button to continue.
20. Creating an EW Agreement

*What you will learn – Creating an EW Agreement*

In this session you will learn how to create an Elderly Waiver – or EW – agreement, how to add a service line and how to enter the rate into the Support Plan.

*Try It! Creating an EW Agreement*

- Log in to MnSP and open a CSSP or Rate Plan.
- Navigate to the Services tab.
- Click Add Agreement.
- Enter the required data to add an EW Agreement.
- Click Add Service.
- Complete the required fields for the service.
- Click Get Rate.
- Go to the Elderly Waiver Residential Services Tool to calculate the Customized Living Rate.
- Enter the rate in the Final Rate box.
- Change the status to Approved.
- Click Save, then click Close to close the service.
- From the Agreement screen, click Save and Close to close the agreement.
- When you have finished, log out, close the Support Plan browser and return to the training. Then, Click the Next button to continue.
22. Support Instructions – CSSP

**What you will learn – Support Instructions**

In this session you will learn where the data in the Support Instructions tab comes from, how to edit and navigate within the tab and the purpose of the Support Instructions. It includes: Information on ADLs and IADLs from the MnCHOICES Assessment. It identifies in each of those areas the training/skill-building needed to increase independence.

Comment box: The narrative entered here includes specific instructions for providers about the person’s preferences and support instructions about what the person needs in relationship to cuing, oversight and monitoring. Sometimes, this is referred to as the type and amount of supervision the person needs.

**Try It! Support Instructions**

- Log in to the MnCHOICES Support Plan Training Zone.
- If you are an assessor, open the CSP and review the ADLs and IADLs. Provide notes for the designated planner about any type and amount of supervision the person needs.
- If you are a planner, open the CSSP and review the ADLs and IADLs and read the assessor’s instructions.
- When you finish, log out and close the Support Plan browser and return to the training. Then, click the Next button to continue.

23. Printing Documents - Rates, CSP and CSSP

**What you will learn – Printing Documents**

In this session, you will learn which documents can be printed, how to preview documents, how to send a document to the printer and how to close the print preview and return to your document in the Support Plan.

These documents have a print option:

- CSP
- CSSP
- Rate plans
- Services agreements
- Rates Input Report (a printout for a service provider – see Rates Training)

**Try It! Printing Documents**

- Click the Try It! button.
- Log in to the MnCHOICES Support Plan Training Zone.
- Open a CSP or CSSP and click the Print button.
- Change the zoom level so you can read the print preview comfortably.
- Review the document using the forward arrow or the dropdown menu.
- Hover your mouse over each of the buttons to see a text description of the button’s purpose.
- Click the Close button to close the print preview screen and return to your document in the Support Plan.
- When you are finished, log out, close the Support Plan browser window or Tab and return to the training.
Workflow

The goal for this section is to give your lead agency a place to start for workflow. Your agency will create a protocol for itself. The information below is here to aid your understanding of key terms and how they affect a user’s ability to work in the CSP and CSSP.

Workflow terms

**Approve:** A service line is approved. The service line is approved because it is agreed the person needs the service. A service line is entered into and then authorized in MMIS.

**Save and Close:** This language appears when talking about service lines and agreements. It allows you to complete your work and close it so you can move on to something else. This combination means you can still work on it. It just shuts the page.

**Save:** If you see a save button, save your work because the page will not automatically do it for you.
CSP: The CSP is a summary document given to the person at the completion of the MnCHOICES assessment. It contains information on what the assessor learned through the assessment process. This includes things such as what is important to the person, the person’s identified, assessed needs for supports, the determined health and safety risks, and identified next steps based on the person’s eligibility.

The certified assessor is responsible for creating the CSP, which reflects what was discovered and decided upon during the assessment process.

CSSP: The coordinated services and supports plan, or CSSP, identifies the services a person needs and his or her choice of providers. A planner creates a CSSP if the person will receive publicly funded services. A planner creates the CSSP and works with the person to build the plan.

The CSP and CSSP windows look very similar. The Type/Status area tells you if you are in a CSP or CSSP and if the document is open or closed.

Open is a CSP and CSSP status. When a CSSP is open, it forces a CSP to close.

Closed is a CSP and CSSP status. It means the document is finished and has no more work to be done in it. When it is closed, you cannot go back in it and make changes. When a CSP or CSSP is closed, it cannot be re-opened.

Complete is a CSP and CSSP status. The information in the plan is complete and you haven’t closed it because you need to access details and potentially to make changes.

• Only assessors should close CSPs. If the assessment and/or CSP are open, contact the assessor who owns the plan and ask him or her to close the assessment and CSP so you can begin your work.
• Assessors must close their assessments and CSPs before a planner works on a CSSP.
• Planners should not create a CSSP from an open CSP unless they are assessors or have consulted with the assessor.
• When a planner creates a CSSP from an open CSP, the CSP is forced to close and the assessor is unable to do any more work in the CSP.
• Only the most recent CSSP for the person — with a Status of either Open or Closed — displays the “Create New CSSP” button. CSSPs can be created during the service year from the most recently closed CSSP.
Which tabs do you use to create a CSP and CSSP?

**Which tabs do you use to create the CSP?**

- Person Information
- Goal (both)
- Needs Summary
- Eligibility
- Referral
- Risk
- About Plan

- CSP
- CSSP
- CSP & CSSP

**Which tabs do you use to create the CSSP?**

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

- CSP
- CSSP
- CSP & CSSP

*Which tabs do you use to create the CSP?*

- Person Information (both)
- Goal (both)
- Needs Summary
- Eligibility
- Referral
- CSP Worksheet - Do not use. Scheduled to be removed from access. Continue to use form 6791B
- Risk (both)
- About Plan (both)
- Next Steps

*Which tabs do you use to create the CSSP?*

- Person Information (both)
- Goals (both)
- Caregiver
• Services
• Support Instructions
• Risk (both)
• Signature - Do not use. Scheduled to be removed from access. Continue to use form 6791D
• About Plan (both)

How do you know you have completed the CSP? CSP checklist:
Recommended items for the assessor to complete before closing a CSP:

☐ Make any needed changes in the assessment and run eligibility.
☐ Review the CSP content to ensure it’s written for the person receiving it.
☐ Make any needed changes in CSP.
☐ Close assessment in the MnCHOICES Assessment.
☐ Close the CSP in the MnCHOICES Support Plan.

How do you know you have completed the CSSP? CSSP checklist:
Recommended items for the planner to complete before closing a CSSP:

☐ Ask questions of the assessor to clarify.
☐ Complete CSSP sections to ensure the person’s plan has the coordinated services and supports he or she identified and that the CSSP is written for the person receiving it.
☐ Go to the Services tab, review the agreement and its service lines to ensure they are complete.
☐ Close CSSP after it has been approved and authorized.