New Mentor Orientation
Welcome!

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Kong Vang
Learning Objectives

Participants will

• Explain basic purpose and functions of MnCHOICES Assessment and Support Plan
• Discover their role as a MnCHOICES Mentor
• Locate and utilize available resources (MnCHOICES CountyLink, HelpDesk)
• Describe common technical issues and troubleshooting techniques
• Understand Known Issues documents, outage schedules and release processes
New Mentor Orientation Agenda

- MnCHOICES Vision, Values and Policy
- Mentor Role
- Supporting Mentors to Support Users
Introductions

Name
Agency
Role
Years MnCHOICES Experience
What you like best about spring
Why MnCHOICES?

Home and Community-Based Services
• Since the early 1980’s
• Programs developed independently
• Each used own assessment criteria/tool

Vision shortly after 2000
• Greater consistency in eligibility determination
• Use a uniform assessment and support planning process
• For all people/programs and services
MnCHOICES Goals

Two Main Goals:

• Provide greater consistency across the state when determining eligibility for publicly funded long-term services and supports

• Use a single comprehensive assessment tool to:
  • Determine needs
  • Develop support plans
What is MnCHOICES?

A change in philosophy

MnCHOICES Values:

• Person-centered planning

• Tailor services using strengths, preferences and needs

• One assessment and support planning tool regardless of age, income or disability
MnCHOICES Supports Vision and Values

- Standardized assessment and support planning protocols
- Common data collection tool
- Policy/rule based eligibility determination
- Web-based computer application
- Reduce paperwork
Understanding the Big Picture: MnCHOICES

- MnCHOICES
- Assessment
- Support Plan
MnCHOICES: Understanding the big picture
MnCHOICES Assessment
What is the MnCHOICES Assessment?
A change in tools and process

Replaces 3 assessments:

1. Developmental Disability Screening
   \textit{DD Waiver, Rule 185, FSG, etc.}

2. Long-Term Care Consultation
   \textit{CADI, CAC, TBI, etc.}

3. Personal Care Assistance
   PCA, CSG,
MnCHOICES Assessment

Key Points

• Focuses on the person, not programs

• Asks: What is important to and for the person being assessed

• “Policy rules-based” eligibility that aligns regulations, statutes and policies

• Determines level of care, case mix, eligibility for programs and services, home care rating and hours of PCA

• Only Certified Assessors conduct MnCHOICES assessments

• The assessment has offline capability to assist assessors conducting the assessment interview
What is MnCHOICES Assessment?
A change in tools and process

• Uses one assessment process for:
  • Any age
  • All abilities
  • Every financial status

• Provides a common data collection tool

• Web-based with offline capability
What is MnCHOICES Assessment?
Consistent

• Aligns all regulations, statutes and policies
• Provides the framework for “getting it right”
• Does not replace professional knowledge and skill of the assessor
• Only Certified Assessors conduct MnCHOICES assessments
What is *MnCHOICES* Assessment? Determines Service Eligibility

- Alternative Care (AC)
- Brain Injury Waiver (BIW both NB and NF)
- Community Alternative Care Waiver (CAC)
- Community Alternatives for Disabled Individuals Waiver (CADI)
- Consumer Support Grant (CSG)
- Developmental Disability Waiver (DDW)
- Elderly Waiver (EW)
- Family Support Grant (FSG)
- Moving Home Minnesota (MHM)
- Personal Care Assistance (PCA)
- Case Management under Rule 185 (DD Case Management)
- Semi-Independent Living Services (SILS)
- Temporary Alternative Care
- 24 Hour Customized Living (24CL)
Developed uniform timelines for assessment and support plan development

- Conduct assessment within **20 calendar days** after request
- Provide Community Support Plan (CSP) to assessed person within **40 calendar days** of assessment visit
- Provide Coordinated Service and Support Plan (CSSP) within **10 business days** after completion of CSP
Timelines for assessment and support planning
The Build: MnCHOICES Support Plan

MnCHOICES Support Plan

MnCHOICES Assessment

CSP/CSSP DHS 6791-B

Rate Management System
Community Support Plan (CSP)

Community Support Plan

By Certified Assessor

Everybody gets one

Summary needs and options

Foundation for CSSP

Written recommendations

Rate Plan

Community Support Plan

Coordinated Service and Support Plan
Coordinated Service and Support Plan (CSSP)

Coordinated Service and Support Plan

- Publicly funded
- More specific
- Case Manager or Certified Assessor
- Preferences and goals
- Approves services
Carries information from Assessment to Support Plan
Access to RMS

- Rate Plan
  - CSP
  - CSSP
User Support

- Mentors
- Help Desk
- Resources
MnCHOICES Mentors Role

Mentors 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

3. Receive, review and share communication

4. Keeper of User Names and passwords (MTZ)
MnCHOICES Mentor expectations

• Key spokesperson and knowledge base for MnCHOICES

• Understand how LTSS polices/practices are incorporated into MnCHOICES

• Share your wisdom and knowledge

• Motivate users and encourage professional development
MnCHOICES Mentor Role

You are your agency’s principal MnCHOICES contact and resource person

• Liaison between your agency and DHS for communication and training

• Support your agency’s MnCHOICES users

• Troubleshoot MnCHOICES policy and technology questions and issues
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
MnCHOICES New Mentor Orientation

MnCHOICES Mentor Alliance

MnCHOICES Help Desk

MnCHOICES Matters

MnCHOICES County Link

MnCHOICES Office Hours
MnCHOICES New Mentor Orientation

• Spring of each year

• Assessment Mentors & Support Plan Mentors

• Trains you to your role and provides support materials
MnCHOICES Mentors Alliance (MMA)

• Meets quarterly
• In St. Cloud
• 9 am – 3:30
• Webex Option, 2 times a year
• Shortly before release
• Next September 6, 2017
MMA Meeting Rules

- We are polite, kind and helpful to other members of our class.
- We listen when others are talking.
- We love to learn and allow others to learn when they want to.
- We will try our best at all times and ask questions if we are stuck.
- We are fun.
MnCHOICES Mentor role discussion

- Experience so far
- Something new you’ve learned
- What excites you about being a MnCHOICES Mentor
- Something you’re looking forward to
- Concerns about being a Mentor
- What you need to support your users
Do we need a break?

Take a break. You deserve it!
MnCHOICES Assessment Mentors
MnCHOICES Certified Assessor Training (MnCAT)

• Qualifications

  • Training

    • Certification

      • Recertification

  • Tips
Only certified assessors can use MnCHOICES to conduct an assessment

A. Be a Qualified Candidate
B. Complete MnCAT Steps 1, 2, & 3
C. Have certificate signed
Who is a Qualified Candidate for MnCHOICES Assessor?

• Must at a minimum have one of these:
  ▪ Bachelor’s degree in social work
  ▪ Bachelor’s degree in nursing
  ▪ Bachelor’s degree in a closely related field

  At least 1 year home and community-based experience
Who is a Qualified Candidate?

Or, must be a Registered Nurse (RN)

- Capped (3 year)
- Two-year

At least 2 years home and community-based experience
MnCAT (Certified Assessor Training)

Recertification

Professional Development

Certified Assessor

Certification

Step 3

Step 2

Step 1

Application

MnCHOICES

Principles

Foundation

Step 4

Qualifications + Experience
MnCAT Step 1 - Foundation

- **Overview** (30-45 min.)
  - **Objective:** Gain a broad understanding about MnCHOICES
  - Must complete, no test

- **Basics** (2.5 – 6 hours)
  - **Objective:** Be aware of, and demonstrate knowledge about information that all certified assessors should know
  - Series of open book tests linked to online resources
    - Five random questions for each topic
    - 80% proficiency each test
Objective: To review, maintain and achieve specific certified assessor core competencies that help prepare the candidate for the MnCHOICES application training and demonstration of key skills.

In 7 courses, candidates learn about:

• The Person-Centered Approach
• Intake, Assessment & Support Planning
• Effective Communication Skills
• Assessment Interview Skills
• Assessment Outcomes
• There is a test after five of the courses
Training Tips

• Disable pop-up blockers
• Read and follow instructions
• Use headphones
• Allow time for staff to complete
• Try to do each course in one sitting
• Allow for different adult learning styles
• Print out results in case of transcript issues
• Have a note pad handy
• Carefully review transcripts before starting Step 3
Objective: Through online and hands on training, candidates become familiar with using the MnCHOICES app to conduct person-centered assessments and support plans

Candidates:

• Learn how to access and navigate the application (Part 1)
• Become familiar with the content and functions of the application (Part 2)
• Practice using the application to complete an assessment, run and analyze eligibility and discuss results in a multidisciplinary team meeting and other hands-on learning (Part 3)
MnCAT Step 3 – Application

• Access is different

• TrainLink
  • Hidden TrainLink
  • Mentors provide “secret” links

• Step 3 – Part 1: Access and Navigation
  • Track A qualified candidates and has prerequisites
  • Track C for other users and has no prerequisites

• MnCHOICES Training Zone (MTZ)
### Instructions for Lead Agency Scheduled Access to MnCHOICES Training Zone and MnCAT Step 3 – Secret Links 07-28-14

<table>
<thead>
<tr>
<th>Course</th>
<th>Who</th>
<th>Prerequisite</th>
<th>Link to MnCAT Step 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Track A</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Content</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Step 3 – Part 3</td>
<td>Qualified Candidates</td>
<td>Yes Step 3 – Part 2</td>
<td>The includes hands-on activities within your agency with oversite by a supervisor, mentor and/or coach. Tools on CL plus one online module</td>
</tr>
<tr>
<td><strong>Learning Lab</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Step 3 Test</td>
<td>Qualified Candidates</td>
<td>Step 3</td>
<td>Provide the link below to candidates only after completing Step 3 Part 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Step 3, Part 3 - Test = <a href="http://pathlore.dhs.mn.gov/stc/dsd/psciis.dll?course=dsd&amp;code=MNCH8010">http://pathlore.dhs.mn.gov/stc/dsd/psciis.dll?course=dsd&amp;code=MNCH8010</a></td>
</tr>
<tr>
<td>MTZ Login</td>
<td>Details</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------</td>
<td>---------</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Usernames</strong></td>
<td>Are assigned by DHS to a specific Lead Agency</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Half of assigned usernames are under Lead Agency 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Half of assigned usernames are under Lead Agency 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Lead Agency</strong></td>
<td>Each Lead Agency is assigned two Lead Agency names (e.g. Lead Agency 1 and Lead Agency 2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Having two names allows Lead Agency users to practice transferring open Intakes between “Lead Agencies.”</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Passwords</strong></td>
<td>Security measures require DHS to send passwords in a separate communication</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instruct users to NOT change the passwords provided to access MTZ</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assigned MTZ passwords do not expire for 9,999 days or until 2041</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Users have 99 attempts to enter password correctly in MTZ before being locked out</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## MTZ vs. PROD Same and Different

<table>
<thead>
<tr>
<th>Item</th>
<th>MTZ</th>
<th>Prod</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access</td>
<td>Can’t access through SSIS</td>
<td>Can be accessed through SSIS</td>
</tr>
<tr>
<td>URL is different than Prod</td>
<td>URL is different than MTZ</td>
<td></td>
</tr>
<tr>
<td>URL will never change</td>
<td>URL changes with each version</td>
<td></td>
</tr>
<tr>
<td>Staff employed by or under contract with lead agency</td>
<td>Staff employed by or under contract with lead agency</td>
<td></td>
</tr>
<tr>
<td>Everyone has security access to complete all MnCHOICES functions</td>
<td>Security access assigned by Mentor or DHS to individuals based on specific job duties</td>
<td></td>
</tr>
<tr>
<td>Each lead agency is two agencies</td>
<td>Each lead agency is only one agency</td>
<td></td>
</tr>
<tr>
<td>Passwords expire in 2041</td>
<td>Passwords expire every 30 days</td>
<td></td>
</tr>
</tbody>
</table>
## MTZ vs. PROD Same and Different

<table>
<thead>
<tr>
<th>Item</th>
<th>MTZ</th>
<th>Prod</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Passwords</strong></td>
<td>User Names and passwords provided by Mentors</td>
<td>User Names and passwords provided by Mentors if SSIS, by DHS if none SSIS</td>
</tr>
<tr>
<td></td>
<td>Incorrect passwords lock out user after 99 attempts</td>
<td>Incorrect passwords lock out user after 3 attempts</td>
</tr>
<tr>
<td></td>
<td>Passwords assigned do not change</td>
<td>Passwords changed by user. SSIS users should use same password for SSIS and MnCHOICES</td>
</tr>
<tr>
<td><strong>Data</strong></td>
<td>Only fictitious names, birthdates addresses, social security numbers, etc.</td>
<td>Only real data is entered for real Intakes and Assessments</td>
</tr>
<tr>
<td></td>
<td>MTZ is only to practice</td>
<td>PROD is only to do real work</td>
</tr>
<tr>
<td></td>
<td>Data entered purged on a scheduled basis</td>
<td>Data entered purged according to department record retention schedule</td>
</tr>
</tbody>
</table>
Recertification

- MnCHOICES County Link Resources

- MnCAT Step 4 – Recertification

- CLU Decision Tree
  Continued Learning Activity Cover Sheet
  Explanation about Statewide List of Certified Assessors
  Person Centered Requirements and Certified Assessors
  Statewide List of Certified Assessors
  MnCAT Step 4: Certified Accessor Quick Study
  MnCAT Step 4: Lead Agency Quick Study
  MnCAT Step 4: Recertification Instructions and Guidance
MnCAT Step 4: Tools on TrainLink

1. [Image of TrainLink interface]

2. [Image of course status and timeline]

Here is more information about this course:

Your status in this course is: Enrolled

Warning: If you have a pop-up blocker, it may prevent online content from launching.

MnCHOICES Step 4: Instructions

Instructions for documenting Continuing Learning Units (CLU).

- **Restart**
- **Review**

<table>
<thead>
<tr>
<th>Status</th>
<th>Completed</th>
<th>Required</th>
<th>Yes, in order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earned Score</td>
<td>0 of 100</td>
<td>Required Score</td>
<td>---</td>
</tr>
<tr>
<td>Actual Time</td>
<td>00:14:50</td>
<td>Maximum Time</td>
<td>No Limit</td>
</tr>
<tr>
<td>Actual Attempts</td>
<td>4</td>
<td>Maximum Attempts</td>
<td>No Limit</td>
</tr>
<tr>
<td>Date Started</td>
<td>01/08/2016</td>
<td>Estimated Time</td>
<td>---</td>
</tr>
<tr>
<td>Date Ended</td>
<td>01/26/2016</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3. Your status in this course is: Enrolled
Warning: If you have a pop-up blocker, it may prevent online content from launching.

Recertification Documentation
Recertification course for MnCHOICES Certified Assessors. NOTE: If you want to open this module after your status is set to "Mastered", select "Review". Clicking "Restart" will delete all of your existing data.

Status: In Progress  Required: Yes, in order

Recertification Certificate
Recertification certificate for MnCHOICES Certified Assessors. NOTE: You should have your current certificate on hand when you view this module, as you will need to enter the start and end dates listed on your current certificate.

Status: Not Started  Required: Yes, in order
Time for a break?

Take a break.
You deserve it!
MnCHOICES County Link

Mentor and Supervisor Tool

Landing Page

• Left navigation bar
• Updates section
• Quick Links
MnCHOICES County Link

MnCHOICES County Link

Mentor - MnCHOICES Assessment

Communications - Release Notes & Companion Documents

• Known Issues
MnCHOICES Assessment 17.2.1 Release: Example
• Revised to June 19 from May 26, 2017

• Pilot will begin on Monday, May 22, 2017 and run for 4 weeks

• Pilot counties include Brown, Beltrami, Benton and St. Louis Counties

• An outage is planned for June 16, 2017 with a statewide release of 17.2.1 on June 19, 2017
Goals for the MnCHOICES Assessment 17.2.1

- Fixes some Demographic switching
- DD Screening changes
- LTC code additions
- PCA report changes
ANTICIPATED NEW FUNCTIONALITY IN 17.2.1 PILOT

• Root cause of the demographic switching bug has been determined and switching is fixed for all new assessments with the 17.2.1 Assessment release.
• Data will now transfer from assessment to reassessment (specifically the ADLs, IADL, Employment and Housing domains)
• Intakes can now be closed with an abandoned disposition
• Personal Care Assistance (PCA) Provider Report updates:
  a. Includes IADLs
  b. Renamed to MnCHOICES PCA Provider Report
  c. Provider report spelling fixed from “pesonal” to “personal”
1. Intake person data, consistently, populates assessment

The Intake fields in the person and activity screens were populating intermittently and incorrectly

With this release’s fix, intake fields will more reliably populate from the Edit Person (Person and Activities) screens
2. Fix for Demographic Switching from the Person screen

When an end user created/updated an assessment, a reassessment or ran an eligibility update from the Person screen, the current assessment document sporadically displayed the user’s recent changes. Sometimes, data from another assessment in that assessor’s queue was populating the original assessment.
Users reported data from a previous assessment was not copying over to the reassessment. This affected the following domains:

- ADLs
- IADLs
- Housing & Environment
- Employment Volunteering & Training

And the following:

- Long-term Care Screening Document (LTC SD)
- Developmental Disability Screening Document (DD SD)
- Personal Care Assistance Service Agreement (PCA SA)
4. Lead agencies can now close an intake as abandoned, after selecting the “Abandoned” disposition

New for MnCHOICES Assessment 17.2.1

• The “Close Intake” button now appears when a disposition of “Abandoned” is selected.
Personal Care Assistance (PCA) Provider Report updates:

- Report now includes IADLs
- Renamed to MnCHOICES PCA Provider Report For:
- Provider Report spelling fixed from “Pesonal” to “Personal”
cont. Renamed PCA Summary to MnCHOICES PCA Provider Report

Assessment ID: [Redacted]
Date of Birth: 03/24/2017
PMI:

Assessor: Caron Wills, BigBizOrg
Eligibility Run Date: 05/17/2017
Assessment Date: 05/12/2017
Result Date: 05/12/2017
6. MnCHOICES incorporates the new DHS logo
7. Reassign button populates with assessor names
DD Screening document fields were not calculating correctly.

Affecting the following fields:
- #30 Mobility*
- #31 Fine Motor*
- #32 Exp Communication
- #33 Receptive Communication
- #34 Self-Preservation
- #35 Vocational
- #36E Leisure recreation

*Two different response values now populate the report for this field for children 0-24 months.

The end user is instructed to ignore the result containing the comment that states, “No answer provided” and use the result with the assessment score produced.
Future DD Enhancements

Updating these fields:

• 36 A - Self-Care

• 36 B – Daily Living Skills/ Household Management

• 36 C - Money Management and

• 36 D - Community Living.

For scores not consistent with guidance given in the DD Screening Document Codebook, follow the same process as you have done with recent DD documents and submit to MnCHOICES policy staff via DHS-6979.
9. In the Long-Term Care (LTC) Screening Doc, new MMIS service codes - A7 (DD waiver services)
LTC Screen Docs Tab - A7 (DD waiver services)
9. In the Long-Term Care (LTC) Screening Doc, new MMIS service codes - A8 (DD-CM non-waiver)
### LTC Screening Docs Tab

<table>
<thead>
<tr>
<th>Field ID</th>
<th>Field Name</th>
<th>Field Value</th>
<th>NOTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>108</td>
<td>Service Plan</td>
<td>A8 - DD-CM non waiver</td>
<td>Source Code: Formal</td>
</tr>
</tbody>
</table>
Role of the MnCHOICES Help Desk

Only Mentors contact the Help Desk

Use the Contact Form

Refer to “Troubleshooting” documents
Troubleshooting Documents with the Help Desk
Hello! Help Desk Gurus are:

• Kong & Dwayne
  • At times you may receive response from others
• Use the Help Desk Contact Form
• OR email to: dhs.ssishelp@state.mn.us
  • MnCHOICES Assessment & Support Plan
Familiarize with MnCHOICES CountyLink

MnCHOICES CountyLink Bookmark me

- MnCHOICES Help Desk
- Assessment
  - Using MnCHOICES Assessment
- MnCHOICES Support Plan information
- MnCHOICES Assessment troubleshooting documents
  - Note the Archived documents
- MnCHOICES Help Desk
  - Known issues
  - Release notes
  - Troubleshooting guides
Troubleshooting guide demonstration

• **Cache Clearing Instructions**
  • Note 2 instruction in one because they’re likely to be used together
  • Note important messages in 2 part – Clearing the isolated storage

• **Unable to Log into Offline Mode**
  • In Step 2 optional - type path into path field instead of going folder by folder

• **Offline Document Restore**
  • Note the important messages
If you’re unable to find help, send it in.

• Be specific
  • Pin point where the issue is
    • In Assessment? Which tab, page.
• Add background info
  • Prior to the issue occurrence ...
    • Computer ran out of battery?
  • Troubleshooting steps taken
• Avoid vague
  • He/She/I’m is kicked out
Reports & Requests

Jane is stuck offline. Please help. ASAP

(a) No internet

(b) Can access online mode, but assessment indicates offline

(c) Receives this message, but no MnCHOICES icon ON DESKTOP
Wrong answer. The correct answer took too long to figure out. Actually, the user was just using Chrome when MnCHOICES only works on Internet Explorer.
Not the users fault, but lets and lets save us time and be as efficient as possible by helping us help you help them and so forth.

A great tool is the Snipping tool

- Screen Shots
- **MnCHOICES CountyLink** Bookmark me
  - Snipping Tool – How to Use It
• Soap error message – Send to HD
Screen shot example
We are looking to working together
THANK YOU
Lunch on your own: Noon to 1 p.m.
Where MnCHOICES Assessment and Support Plan meet
MnCHOICES

• MnCHOICES Assessment, the Assessment
• MnCHOICES Support Plan, the Support Plan

NOT

MnCHOICES meaning the Assessment
MnSPA meaning the Support Plan
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.
What we hope to learn from first launch agencies?

- RMS works in the Rates Plan
- Was the training for contracted case management organizations and lead agencies (Mentors & Supervisors) sufficient for them to provide support to their staff?
- Resources, tools and aids were helpful? Sufficient?
- User Onboarding: Test process & form
- Maintenance form and process
- How agencies use About Plans
- Work flow for Support Plan and RMS
- The role and numbers of mentors needed
What we have learned to date from first launch groups?

• Agencies did not have a complete list of their MTZ-A documents

• MTZ-A documents required elaborate amount of time to prepare for training

• Creating a duplicate assessment from
  • an existing agency assessment resulted in unanswered questions
  • a new assessment resulted in few unanswered questions

• Sending the Training Zone URL and user names assisted in assigning duplicates and training efforts
What else did we learn from first launchers?

Supervisor Mentor Training

• Needed time for reviewing work flow
• Confusion between MTZ-A and MTZ-SP URL’s
• Confusion between passwords for each training zone
• Resulted in lock outs

Onboarding users required more time then we first anticipated
Support Plan - Launch Documents

• Launch Schedule
• Work Plan
• Webinar Schedule

Training & Webinars

• No required training
• No certification
Support Plan Launch Webinar Schedule

Support Plan Webinars – Disability Services Division training archive
MnCHOICES Mentor Key Terms

- Outage
- Release
- Pilot
- All Clear
- Release Notes & Companion Document
- Known issues
MnCHOICES Communications: Messages & Outages

How to read an outage schedule - Releases & Pilot

• 2016-2017 Anticipated Assessment Release and Outage Schedule

Messages

• 20-day, 5-day and day of scheduled Outage Messages

• Unscheduled outage messages

• Training and other communications
MnCHOICES Training Zones
• TrainLink
• Training Zone
• MTZ-A
• MTZ-SP
• User Names
• Passwords
Will we have different user names and passwords for MTZ-SP?

- 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

Each has it’s own URL & User names
Most agency’s have two groups for example

• Banana County 1 and Banana County 2

• Users are divided between these two groups

• Duplicate assessments need to exist for Group 1 and Group 2 so that they can be assigned.

• For example, Banana County 1, BAN001 will receive duplicates in the assignment queue but will only be able to assign the duplicate to the users in group 1.
MTZ-A User Names

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
• Each username begins with the Agency abbreviation = BAN + the three digit number

• To access MTZ, Banana County MTZ User001 would select the following when logging into MTZ:
  o Select lead agency name = Banana County 1
  o Type in UserName = BAN001
  o Type in Password given
### MnCHOICES Support Plan Launch Schedule

<table>
<thead>
<tr>
<th>Support Plan Launch Group</th>
<th>Grouping</th>
<th>Rates CSP/CSSP Launch Date</th>
<th>RRS Regions</th>
<th>Training Date &amp; Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>FLG</td>
<td>Anoka, Brown, Le Sueur, Washington</td>
<td>4/3/2017</td>
<td>FLG</td>
<td>complete</td>
</tr>
<tr>
<td>1</td>
<td>Benton, Chisago, Isanti, Kanabec, Mille Lacs, Pine, Sherburne, Stearns, Wright</td>
<td>7/17/2017</td>
<td>7e, 7w</td>
<td>4/20/2017</td>
</tr>
<tr>
<td>2</td>
<td>Carlton, Cook, Itasca, Koochiching, Lake, St. Louis</td>
<td>7/31/2017</td>
<td>3</td>
<td>4/20/2017</td>
</tr>
<tr>
<td>3</td>
<td>Big Stone, Blue Earth, Chippewa, Countryside, DVHHS (Cottonwood, Jackson), FMCHS (Faribault, Martin), Kandiyohi, Lac qui Parle, McLeod, Meeker, Nicollet, Nobles, Renville, Sibley, SWHHS (Lincoln, Lyon, Murray, Pipestone, Redwood, and Rock Counties), Swift, Watonwan, Yellow Medicine</td>
<td>8/14/2017</td>
<td>6, 8, 9</td>
<td>5/11/2017</td>
</tr>
<tr>
<td>4</td>
<td>Becker, Cass, Clay, Crow Wing, Horizon (Douglas, Grant, Pope, Stevens, Traverse), Morrison, Otter Tail, Todd, Wadena, Wilkin</td>
<td>8/28/2017</td>
<td>4, 5</td>
<td>6/6/2017</td>
</tr>
</tbody>
</table>
Provide the Mentors and Supervisors the information they need to train and support the launch of their MnCHOICES Support Plan users.

- All Supervisors and mentors (RMS included)
- MTZ-SP Access (90-days prior to launch, 3 hours training)
- Review training, work flow, and walk through of MnSP
MnCHOICES Help Desk

Need Help Diagram
Help Desk Contact Form
Contacting the Help Desk

• Troubleshooting documents
  • Role
  • Location
What form do I submit to Help Desk for the Support Plan?

Technical, Policy and Other
Support Plan password lockouts and resets
Mentors only
Do not use it to
• add or delete users to the Support Plan
• make changes to other data (email, name)
Future changes to the form include:

7. Problem occurred in
   - Support Plan
   - MnCHOICES Assessment
     - Offline Mode
     - Online Mode

8. User Technical Specifications adding in
   - 8a. Windows 10
   - 8b. Windows Surface

Work Around “11. Problem Description” add computer application you are working in

Future Date: Combine Rates Mentor Form and the MnCHOICES Help Desk Form
Submit the [DHS-6979 Help Desk Contact Form](#) for policy and technical issues

Use the form for Assessment and Support Plan both

Add MnCHOICES Support Plan in line 11 of Technical Page
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?
Welcome to the System Security & Access Management (SSAM) Content Area

The SSAM Team receives your access requests and manages access for Human Services and MINsure systems (MAXIS, MEC², MMIS, 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 Gary, 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 Unapproved Password Reset Request

Use this form to request a new password reset for EBT, MAXIS, MEC², MMIS, PRISM, InfoPacReports, SRI, PSA Key Fobs (PSN/MMI) and NFIS (formerly MINsure).

Service Delivery System Security Request (DDS, MHO)

Service Entity Supervisor - Use this form to request a new logon ID or to add, modify or terminate security access to DDS, MAXIS, MEC², MMIS, PRISM, SRI, PSA, InfoPacReports, Web Reporters or DSS.

Security Liaison Handbook for Counties and Tribes

Security Liaison Handbook for Counties and Tribes 2/20/2017

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.
• **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](mailto: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
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 using Rates in the Support Plan rather than SSIS.

• Like that the Service Agreement report follows MMIS entry.
Walk through of each

• Technical Specifications
• Known Issues
• Crosswalk Document
Technical Specifications – Hardware & Browser

Hardware

• Processor(CPU) 2.5 GHz or higher
• 4 GB of RAM minimum

Browsers - Windows Edge:

• MnCHOICES Assessment uses Silverlight. Silverlight is not compatible with Microsoft Edge. MnCHOICES Assessors working in the MnCHOICES Assessment and MnCHOICES Support Plan should use Internet Explorer 9 or higher.

• Microsoft Edge can be used by staff who work in the MnCHOICES Support Plan only
MnCHOICES Support Plan

MnCHOICES Support Plan - Login

My Agency:
User Name:
Password:

Login
Support Plan Resources - MnCHoices County Link

Training – Support Plan

Crosswalk: Assessment and Support Plan
MTZ-SP Training Preparation
Support Plan Training on TrainLink
Support Plan Try It! Companion Document

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

Support Plan – Using the Support Plan

• Build and Print: CSP/CSSP Crosswalk
About Plan: Start there for rate at person, CSP and CSSP

- Sets the date span of the plan
- Open, complete, closed
- Owner, Secondary owner

My Plans: Searches

Services Tab: Show Rate Button
First Launch Panelist Experience

Minnesota Age & Disabilities
Odyssey Conference

MnCHOICES "Work'n the Plan": It's Here!

Note this session will begin at 8:30 a.m.

This intensive offers participants the opportunity to learn about the benefits of the MnCHOICES Support Plan (SP) electronic application. Join us in building a support plan from a mock assessment. Hear from MnSP pilot agencies about their extensive experience using the application. Learn about what is next – when others will launch, planned enhancements and how this application will be used by both lead agencies and contracted case management agencies.

Learning objectives:
- Recognize the timesaving benefits, while learning how a CSP and CSSP are built using the support planning application
- Learn what information gathered in the assessment displays in the MnCHOICES Support Plan
- Understand the importance of well-written, person-centered comments and narratives
- Learn from pilot counties what worked, and their recommendations for enhancements
Lessons Learned: Efficiency

Overall they are pleased with the Support Plan

Saves between 30 minutes to 90 minutes per CSP/CSSP

They have been asking to use the Support Plan when given a paper assessment or CSP because they would rather work in the Support Plan

Your agency should consider investment in two screens for your computer 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**

• **Real time demonstration**
Lessons Learned: Team Meetings

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

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MnCHOICES Support Plan Known Issues
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
Onboarding Users: Common Issues

• X-number and first email with passwords

• Passwords locks out: try to MTZ-A users names and passwords

• Attempt to try to many times and get locked out

• But can send in and get unlocked right away.
This is an automated e-mail message, please do not reply.

6/5/2017

Hello MnCHOICES Support Plan,

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: MnSP
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/ (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
This is an automated e-mail message, please do not reply.

6/5/2017

Hello MnCHOICES Support Plan,

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: pmHiWM9H

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://mnoch-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
Questions
Thank you

MnCHOICES Business Team | DSD