Pre-launch Call

MnCHOICES Support Plan Launch Calls
Welcome & Introductions

MnCHOICES

• Business Team Supervisor
• Support Plan Project Manager
• Support Plan Business Analysts
• Policy staff
• Operations staff
• All participants are muted
• Do submit technical issues
  • Use the WebEx Q&A panel
• Type in your questions into Web-ex
• Can revisit this training on the webinar archive
For: Launch leads and mentors who have completed their Support Plan Supervisor Mentor Training and have access into MTZ-SP

Purpose: To ask questions about training and using the Support Plan computer application. When your agency launches you no longer need to attend this call.

Agenda:

1. MnCHOICES Support Plan Follow-up and Updates
2. Lead Agency questions about the computer application
3. Launch Instructions per the schedule below
Support Plan Pre-Launch Call Schedule

August 23, 2017, 1:00 p.m. to 2:30 p.m., Launch Instructions Group 4
September 6, 2017, 1:00 p.m. to 2:30 p.m., Launch Instructions Group 5
September 20, 2017, 1:00 p.m. to 2:30 p.m., Launch Instructions Group 6
October 4, 2017, 1:00 p.m. to 2:30 p.m., Launch Instructions Group 7
October 18, 2017, 1:00 p.m. to 2:30 p.m., Launch Instructions Group 8 and 9
When launching MnCHOICES Support Plan for running rates and creating CSPs or CSSPs

• Use the Rate Management System in the Support Plan and not in SSIS-RMS.

• For all MnCHOICES assessments and reassessments, create CSP and CSSP in the MnCHOICES Support Plan, rates in the service agreements and service lines in the person’s CSSP.

• For all assessments created with the legacy document continue to use the 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.
How do we work with agencies who haven’t launched in the MnCHOICES Support Plan?

When your lead agency launches, you complete the CSP in the MnCHOICES Support Plan for assessments completed using the MnCHOICES assessment tool.

Unlaunched agency receives a CSP printed from the MnCHOICES Support Plan from your agency. Because that lead agency has not yet launched, they would complete the CSSP using DHS-6791B.
How do we work with agencies who haven’t launched in the MnCHOICES Support Plan? cont.

Your lead agency has not launched: the lead agency would complete the paper CSP document following the assessment and provide it as paper to the launched agency.

The launched agency receives the paper CSP, they create a rate plan at the person level in the Support Plan, and complete the CSSP on paper.
Quick links
These are links to documents you use every day. Click on MnCHOICES in the link.

Assessment Guidance Documents
- Developmental Disability Screening Document Fields (Guidance)
- Forms for LTSS Assessment, Eligibility, and Support Planning
- Long Term Care Screening Document Fields (Guidance)
- PCA Service Agreement Document Fields (Guidance)
- Using CSP, DHS-6791B with a MnCHOICES Assessment
- When to use the MnCHOICES Assessment

Support Plan
- Build and Print: CSP/CSSP Crosswalk
- Crosswalk: Assessment and Support Plan
- Launch Schedule: Groups and Dates – MnCHOICES Support Plan
- MnCHOICES Support Plan Pre- and Post-Launch Calls
- Support Plan Known Issues 6-16-17
- Support Plan training
- Support Plan Try It Companion Document
- Webinar archive: Disability Services Division
- Webinar Schedule
- Which Support Plan Tabs do I use to create a CSP/CSSP?

Support Plan Quick Links
- Build and Print CSP/CSSP Crosswalk
- Which Support Plan tabs do I use to create a CSP/CSSP?
## Build and Print: CSP/CSSP Crosswalk

**Information Process in MnCHOICES Support Plan Application**

<table>
<thead>
<tr>
<th>Tabs used to build:</th>
<th>MnSP tab title (Tabs are not in the order as seen in MnSP)</th>
<th>Description of content shown and/or editable in each tab</th>
<th>Editable in:</th>
<th>Prints in:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSPverbose</td>
<td>Needs Summary</td>
<td><em>Information from each MnCHOICES Assessment domain about the person’s needs</em> (displays as multiple tables)</td>
<td>Assessment</td>
<td>N/A</td>
</tr>
<tr>
<td>CSP</td>
<td>Needs Summary</td>
<td><em>Information from Support Planning Implications from each of the MnCHOICES Assessment domains</em></td>
<td>Assessment</td>
<td>CSP</td>
</tr>
<tr>
<td>CSP</td>
<td>Eligibility</td>
<td><em>Information from Eligibility Summary in MnCHOICES Assessment</em></td>
<td>Assessment</td>
<td>N/A</td>
</tr>
<tr>
<td>CSP</td>
<td>Referrals</td>
<td><em>Information from MnCHOICES Assessment domains labeled “Referrals Needed”</em></td>
<td>Assessment</td>
<td>CSP</td>
</tr>
<tr>
<td>CSP</td>
<td>Referrals</td>
<td>Text box: “Document Decisions Made and/or Actions Taken on the Referrals below”</td>
<td>MnSP</td>
<td>N/A</td>
</tr>
<tr>
<td>CSP</td>
<td>Next Steps</td>
<td>Text box: “Comments”</td>
<td>MnSP</td>
<td>CSP</td>
</tr>
<tr>
<td>CSP</td>
<td>Next Steps</td>
<td>Check boxes on next steps and fillable box: “We are waiting for (describe)”</td>
<td>MnSP</td>
<td>CSP</td>
</tr>
<tr>
<td>CSP</td>
<td>Caregiver</td>
<td><em>Information from caregivers identified in Caregivers domain in MnCHOICES Assessment, notes/comments</em></td>
<td>Assessment</td>
<td>CSP</td>
</tr>
<tr>
<td>CSP</td>
<td>Caregiver</td>
<td><em>Information from caregiver interview notes/comments in MnCHOICES Assessment</em></td>
<td>Assessment</td>
<td>N/A</td>
</tr>
<tr>
<td>CSP</td>
<td>Caregiver</td>
<td>Text box: “How will the Support plan?”</td>
<td>MnSP</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Support Plan User Manual - First place to go

How to use the MnCHOICES Support Plan user manual
The user manual is organized by the screens in the MnCHOICES Support Plan. In general, each page of the user manual corresponds to one screen in the Support Plan. Use the menu at the top left of the screen to navigate to the help page for the Support Plan topic that you are interested in.

Which parts of a plan do you need to complete?
Which tabs you work in and which parts of a CSP, CSSP or Rate Plan you complete will depend on your role. Assessors complete both the MnCHOICES Assessment and the CSP. Planners complete the CSSP. Planners are anyone who will be doing support planning with the person. The user manual uses the following icons to show when a part of the user manual is relevant to Assessors, Planners, or both:

- Assessor
- Planner

Feedback
The user manual was created to help you quickly get answers to your questions as you are working in the Support Plan. If you found the information that you were looking for, you can let us know by clicking the “Yes” radio button in the feedback section. If you did not find the information you were looking for in the user manual, click the “No” radio button. A text field will appear, in which you can briefly describe the information you were looking for. When you are done, click Submit. We will use the feedback we receive to add to and improve the user manual.

Resources
- CountyLink: Latest information, known issues reports, feature requests and more.
- PolicyQuest: The Disability and Aging Policy/Quest is an automated web-based system for lead agencies to submit policy questions. The Acronym and abbreviation list is a list of acronyms and abbreviations commonly used across the department is posted on its site.
- CBBM: The Community-Based Services Manual (CBBM) is a reference tool for lead agencies who administer home and community-based services.

MnCHOICES Support Plan

MnCHOICES County Link

Training, Support Plan

- Support Plan training
  - Build and Print: CSP/CSSP Crosswalk
  - Crosswalk: Assessment and Support Plan
  - MTZ-SP Training Preparation
  - Support Plan Known Issues 6-16-17
  - Support Plan Known Issues 5-17-17
  - Support Plan Known Issues 4-21-17
  - Support Plan Training on TraiLink
  - Support Plan Try It! Companion Document
  - Which Support Plan tabs do I use to create a CSP/CSSP?
Example of Agency protocol

- **Plan owner:** assessor
- **Shared owner:** case manager
- **Secondary owner:** case aide
- **Plan aide:** Services, RMS user

Can be used differently in each plan: Rate, CSP & CSSP

Lead agency choice
Duplicates & the Person clearing status required

Person Information tab

Example: Update the marital status

• Checks the State databases

• Error message occurs: Not real PMI
Support Plan: Person search can’t find the person

Insert a person in MnCHOICES Assessment

- Search for the person by: name, gender and age range 0 to 100
- Searches state database
- Select the person, click insert person button
- **Batch load**: People with services prior to your agency launching into MnSP
- MnA adding staff with an intake role? If there’s a need to insert people
- **Tool**: Assigning SSIS users MnCHOICES Functions Intake Role
- Person is in SSIS or MMIS can search for them in the assessment
Running a rate at a person level

Learn more Support Plan Training Module: Creating Rate Plan

• County Link: Rates Training

• Let’s Try It – Steps include: Demonstration: Alvin Austin
  • Search for person
  • Create Plan
  • Create Rate Plan
  • Defaults to Services tab however Go to the About Plan – set the dates
  • Service Tab – create service agreement and service line
The Support Plan includes the following service planning features:

• The **CSP provides a summary** of what the assessor learned about the person in their MnCHOICES Assessment

• A **CSSP provides a plan for supports and services** for the person who received an assessment and is receiving public funded services

• The **CSSP includes a Service Plan**. Rates for most services, including calculating rates in the Support Plan Rate Management System services and entering predetermined or market rates services in the Support Plan.

To ensure a person’s plan is complete, you must calculate RMS rates and enter market rate and pre-determined service rates in a service agreement.
Lead agencies will establish a financial protocol in interaction with the MnCHOICES Support Plan. Lead agencies need to decide:

- Who creates and authorizes budgets for individual plans
- How and where the budget information is communicated in the Support Plan
- Who reviews the service agreement to ensure services are within budget
- Who approves services
Lead agencies will establish a **reporting protocol** so services can be authorized in MMIS. Lead Agencies need to decide:

- Who approves services
- Who runs Service Agreement Reports
- When the Service Agreement Report is run
- Who hands the Service Agreement Report off to designated staff for MMIS entry
Key things to keep in mind

• The CSSP and its service tab is a tool for assessors, case managers and case aides

• The services tab is where the Rate Management System is accessed and where market and pre-determined rates are recorded

• Services are approved in the Support Plan

• Services are authorized in MMIS

• Protocols should not interfere with the assessor/case manager’s creation of the CSP or CSSP

• Protocols should not interfere with state mandated timelines
1. **Whether creating CSSP or Rate Plan at person level begin at the About Plan**
   - **CSSP**: defaults to assessment date and the user updates to actual plan dates.
   - **Rate Plan**: Defaults to today’s date and the user updates to actual plan dates.

2. **Services Tab - Service Agreement**
   - Date span defaults to today’s date plus one year. Dates do not display in header.
   - Dates must fall within the date span of the plan.
   - The County of Residence field must be entered to complete RMS calculated services and EW/AC Residential services. If this field is left blank the rate for the service cannot be determined.

3. **Service Agreement, add service (Service Line):** Dates must fall within the date span of the service agreement dates.
Common Support Plan Troubleshooting

Services tab and date conflicts result in error messages in the Rate Plan and CSSP

Set the plan dates in the About Plan tab not the service agreement

a. Rate Plan at person level should match CSSP date span you are calculating for

b. Services agreement and service line dates: same as plan date or nested inside each other
1. **About Plan**: plan dates (match CSSP) even Rates at person level

2. **Service tab** date spans can be apple-to-apples or nested

   - **Apples-to-apples**: Service agreements can be same date spans as About Plan. They match.

   - **Nested**: Dates spans start after the plan date or service agreement date and may be nested inside the plan or agreement date range
CSSP Services tab: Best practice service planning work flow

Planner: Sets up the service agreement and service lines

- About Plan sets plan dates
- Services Tab
- Add Agreement and completes agreement
- Add Service from the service agreement
- Unclicks Show Rate Button in the service line
- Sets up service line under the service agreement by choosing Add Service to create each service line
- Any rates notes in the Service Notes
- Saves all the service lines
Show Rate Button

- Services tab
- Service Agreements
- Service Line

Work Flow Example

Case manager unclicks sets up line

Rates can click, run rates and approve
### About Plan Tab: Case manager assigns plan aide

<table>
<thead>
<tr>
<th>Assignments:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delegate Agency</strong></td>
</tr>
<tr>
<td>Plan Owner:</td>
</tr>
<tr>
<td>Shared Owner:</td>
</tr>
<tr>
<td>Secondary Owner:</td>
</tr>
<tr>
<td>Plan Aide:</td>
</tr>
</tbody>
</table>
Example of work flow in the Service Agreement, part 1

Rates Person in the CSSP Services Tab: Reviews, enters/calculates rates and approves the services set up by the planner

• Services tab, edit agreement, enters program totals and approval by agency and name, save and close
Reminders in preparing for training, cont.

**Counties who have dedicated staff for calculating rate**

Have rates staff create a rate at the person level

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

Go Email

Attachments to Go Email

• Known Issues

• Release Notes & Companion Documents: None
Successfully onboarded users: Friday afternoon prior to launch

The MnCHOICES Help Desk has been notified that MnCHOICES Support Plan Launch Group 3 users are successfully onboarded: 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, Waseca Public Health, Watonwan, Yellow Medicine
Login Credentials will be sent out directly to individual users in your agency the Friday prior to launch

- User Name: X number or a PW. If you already have one it will be your existing one

- User Password temporary, reset prompt at first log in

- If receive the email early the system won’t let you log in before your start date

- Contracted agency users who are onboarded with another lead will not see an email. But will log in as the new combination
Part 1: MnCHOICES Support Plan New User Notification

Fri 7/7/2017 9:48 AM

NO-REPLY-MNSP@STATE.MN.US


To: [Name] (MNSP)

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

7/7/2017

Hello [Name],

This note is to inform you of your new account on the MnCHOICES Support Plan application as Support Plan access.

Please use these credentials when logging in:

User Id: TestUser

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

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

You can access the MnCHOICES Support Plan application by clicking this link: HTTPS://MNCH-SUPPLAN.DHS.STATE.MN.US/ (please save this in your favorites).

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

Thank you,

Web Application Central Security Team
Part 2: MnCHOICES Support Plan New User Notification

Fri 7/7/2017 9:48 AM

NO-REPLY-MNSP@STATE.MN.US

[SECURE] Part 2. Official MnCHOICES SUPPORT PLAN New User Notification

To: Ahmed, Umer (MNIT)

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

7/7/2017

Hello Test Test,

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

Please use these credentials when logging in:

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

Password: dhMWA0AV

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

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

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

Thank you,

Web Application Central Security Team
MnCHOICES Support Plan Passwords

1. Temporary passwords Do not expire however 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
No email was sent to the user?

Mentor Steps to Take

1. Search users email
2. If they did not receive the emails, the security Liaison contacts SSAM

Likely an email misspelling from the onboarding sheet

3. If not misspelling submit to the Help Desk
Creating your new password

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

Username: pwuxa57
Old Password: 
New Password: 
Confirm Password: 

You have successfully changed your password. Please logout of the application and rellog using your new password.
Go Email: Your agency may begin using MnCHOICES Support Plan in the production environment (PROD) to create CSPs, CSSPs from MnCHOICES Assessments and to run rates in the Rates Management System (RMS) in the Support Plan.

MnCHOICES Support Plan Mentors Must:

1. Instruct all MnCHOICES Support Plan users to follow instructions below.
Known Issues

- Click on Table of Contents
- Organized by tabs
- Cross out means issue is fixed

<table>
<thead>
<tr>
<th>My Plans tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue</td>
</tr>
<tr>
<td>Change My Agency button may be displayed even if it is not needed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Services tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue</td>
</tr>
<tr>
<td>The Add Agreement button may not be visible when the navigation buttons take up two or more lines</td>
</tr>
</tbody>
</table>
Questions
Thank you!

MnCHOICES Support Plan
Pre-Launch Call