New to MnCHOICES

MnCHOICES Training & Help Desk
Welcome!

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Beth Siewert
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 fall
What would you like us to answer today?
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
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

- Assessment
- Support Plan

MnCHOICES
MnCHOICES: Understanding the big picture

MnCHOICES

Assessment

Intake

HRA

Assessment
Reassessment
HRA Full

Community Support Plan

Coordinated Service and Support Plan

Rate Plan

Support Plan
Understanding the Big Picture: 
MnCHOICES

MnCHOICES

Assessment

Support Plan
MnCHOICES Assessment

Replaces 3 assessments:

1. Developmental Disability Screening (DD)
2. Long-Term Care Consultation (LTCC)
3. Personal Care Assistance (PCA)
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
MnCHOICES Policy Key Points

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
Why learn about the MnCHOICES Assessment?

• The Support Plan is part of a two part process to streamline assessment and support planning into MnCHOICES computer application.

• Data from the Assessment comes over from the Assessment database to the Support Plan.

• Communication, support and processes used for MnCHOICES Mentors Assessment and Support Plan are the same.
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
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
The rate plan umbrella includes
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, lead agencies must calculate RMS rates and enter market rate and pre-determined service rates in a service agreement.**
Questions
User Support

- Mentors
- Help Desk
- Resources
Mentors matter
Mentors are your agency’s principal MnCHOICES contact and resource person

Mentor Roles and Responsibilities
1. **Supporting Users**
   - Encourage and coach staff
   - Provide hands-on support
   - Help identify issues and problem solve

2. **Foster collaboration between your agency and DHS**
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
MMA mentors share: Key benefits of having mentors

• A go to person
• A primary communicator and troubleshooter
• Problem solver
• Immediate on site assistance to prevent production down time
• Communication liaison who disseminates information and communication and directs people to resources
# MMA mentors share: key mentor skills

<table>
<thead>
<tr>
<th>Expertise and organization</th>
<th>Available, willing to be interrupted</th>
<th>Comfortable with technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strong leadership skills, respected by peers</td>
<td>Program knowledge - good grasp on DHS manuals and other online resources</td>
<td>Ability to attend mentor meetings and trainings</td>
</tr>
<tr>
<td>Curiosity</td>
<td>Flexible to change</td>
<td>Time and patience</td>
</tr>
<tr>
<td>Troubleshooting</td>
<td>Communication</td>
<td></td>
</tr>
<tr>
<td>Can teach others rather than doing it themselves</td>
<td>Organized</td>
<td></td>
</tr>
<tr>
<td>Patient</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
MnCHOICES New Mentor Training
MnCHOICES Mentor Alliance
MnCHOICES County Link
MnCHOICES Matters
MnCHOICES Office Hours
MnCHOICES Help Desk
MnCHOICES Mentors Alliance (MMA)

- Meets quarterly
- In St. Cloud
- 9 am – 3:30 pm
- Webex option, 2 times a year
- Shortly before release
MnCHOICES County Link

Assessment and Support Plan Resources for mentors and users

Quick Links
MnCHOICES Communications

DHS has archived all documents more than 2 years old.

MnCHOICES Support Plan webinars
Crosswalk: Assessment and Support Plan
Launch Survey Questions & Answers
Launch Webinars: Questions & Answers
Webinar Schedule
Webinar Training Archive: Disability Services Division

MnCHOICES Matters

July 2017
May 2017
March 2017
January 2017
October 2016
September 2016
August 2016
July 2016
June 2016
April 2016
November 2015
July 2015
April 2015
February/March 2015
January 2015

Subscribe to MnCHOICES Matters electronic mailing list

Let’s subscribe to MnCHOICES Matters

• MnCHOICES County Link

• Communication

• MnCHOICES Matters
• **Office Hours Overview**

• Conference call - its purpose is to assist in MnCHOICES Assessment and Support Plan implementation

• Assessment and Support Plan once a month, 1.5 hrs

• Schedule and how to get access code
Questions
Role of the MnCHOICES Help Desk

Only Mentors contact the Help Desk

Review the Need MnCHOICES Help? before contacting the help desk.

Refer to “Troubleshooting” documents
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
If you’re unable to find help, send it in.

MnCHOICES Help Desk
Help desk hours
8 a.m. – 4:30 p.m., Monday – Friday
Telephone: 651-431-4801
If you have questions, contact the SSIS/MnCHOICES help desk:

- Use the DHS-6979 Help Desk Contact Form
- Send a message to dhs.ssishelp@state.mn.us
- Review the Need MnCHOICES Help? before contacting the help desk.
Sending into the HelpDesk

Be specific: Pin point where the issue is: Which tab
Add background info: What steps led up to the issue
Troubleshooting steps taken
Avoid vague: He/She/I’m kicked out
Jane can’t log in

(a) No internet

(b) Password needs to be reset?

(c) URL damage?
With too little detail it took some time to figure out the user was logging into the MnCHOICES Support Plan Training zone not the production site.
Not the users fault, but lets save 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
Help Desk Support Plan Troubleshooting

**Issue**

1. No one in your agency got their user name/password or Go Email
2. User does not receive part 1 or part 2 email with user name and password
3. User is unable to log in after receiving Go Email
4. Password does not work

**Solution**

1. Check in with IT to see if spam blockers are diverting emails
2. Ask SSAM security liaison to correct email misspelling
3. Request URL from Help Desk – it might be damaged from copying
4. Mentors request Help Desk to reset password
User Access in the Support Plan
User Maintenance

• All changes (additions, name changes, deleting users) through SSAM after users are onboarded

• Users are onboarded the Friday before launch

• Lead Agency security liaison submits any user additions or changes to the SSAM team

• Ramsey & Hennepin County are submitting final revised list one month prior to launch date
SSAM: How does it differ from the Help Desk

Lead Agency Security Liaison only

Add, delete or make changes to users

Know who that person is at the lead agency
Handling MN Information Securely

"Handling MN Information Securely" is the new suite of courses to fulfill both due diligence and federal requirements for data practices and security training. These courses must be completed annually.

As you register, there are 3 core modules that are required for everyone who wants or has access to DHS data. In addition, you will also be asked to identify your role. By selecting this role, you may be assigned other short modules which cover either specific data-based awareness for the kind of information you access as a part of your job, or specific roles you have in accessing information.

Even if you have a TrainLink account with DHS for training, you should take these courses from this site.
• Identify the Systems, Security and Access Management (SSAM) security liaison for your lead agency

• Support Plan Mentor with work with the security liaison to request Support Plan user access
• SSAM security liaison submits the “MnCHOICES Support Plan Request and Authorization Form” to SSAM Help Desk

• Form 4442: undergoing revisions to include MnCHOICES Support Plan
Lead Agency (on behalf of)

• County or tribe requesting access

My Agency

County, tribe or contracted agency. Which agency employs the person?
Password reset:
- **SSAM**: 2 hours
- **MnCHOICES Help Desk**

Adding/Change users:
- **SSAM**: within 5 business days

The Access Management (SSAM) Team has received your request and placed it in our work queue.

**What happens next?**
- If you are a security liaison or a state supervisor/manager, we will contact you with status information or follow up questions.
- If you are not a security liaison or a state supervisor/manager, we will not process your request. Please submit your request to the security liaison for your area.

**Did you supply enough information?**
Unsuspends and password reset requests need:
- User’s name
- User’s logon ID/user ID
- Which system/application the user is trying to access

System access requests need:
- A completed SSAM Access Request or DHS 4442 form (all red * items are required)
- A descriptive business reason for each application being requested
- The user must be current with all required training

**Expected response times:**
Our business hours are Monday through Friday 7:00 am - 4:30 pm
- Password resets and/or unsuspends – response within 2 hours of receipt
- Access requests – response within 5 business days of receipt of all needed information

**When should you follow up on a request? (Include the original request with your follow up)**
- If we ask for additional information
- If you are concerned because we have not responded within the expected response times above
SSAM has requirements to review and recertify access on an annual basis and must revoke access for staff who are not in compliance.

SSAM uses an automated system for reviewing recertification.

Users are notified on the 1st of each month for any training that is will expire in the next 45 days.

This notification allows time to complete training.
It’s Time For A Break

Break: 10 minutes
Where MnCHOICES Assessment and Support Plan meet

Systems of training, communication, resources, and supports are similar for the MnCHOICES Assessment and Support Plan. Mentors have common language and processes
Releases

- Purpose of a Release
- Quarterly
- Hot fix

Online Resources
Releases: MnCHOICES Mentor Key Terms

- **Outage**: users do not have access to the computer application because code and/or content changes are being made.

- **Release**: the code and content being made.

- **Pilot**: a group of agencies who test the computer applications before they go out state wide.

- **All Clear**: Users can safely go back to work on the computer application.

- **Release Notes & Companion Document**: gives you a list of what changed and picture document that shows user the before and after the changes.

- **Known issues**
How to read an Outage Schedule

Outage Schedule Key Components

• SWNDX

• Pilot

• New Release

• 2016-2017 Anticipated Assessment Release and Outage Schedule
Outages: Release or Application is down

- 20-day, 5-day and day of scheduled outage messages
- Unscheduled outage messages
- All clear message
Other types of messages

• Office Hours call information
• MnCHOICES Mentor Meeting
• Webinar announcement
• Pre & Post Launch Call Instructions

Go Email: Support Plan Group 3 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.
2. Log in using this URL: https://mnch-supplan.dhs.state.mn.us/login.aspx
3. Instruct all Support Plan users to begin working in PROD
4. Provide all Support Plan users with the documents attached to this email

Mentors should:
• Review and familiarize themselves with all documents sent by DHS. Support Plan Known Issues 6-16-17 are on MnCHOICES County Link.
• Forward documents to all users who need them to work in the Support Plan
• Use MTZ-SP to review the features and functions which will help provide technical support to all users in the agency
• Check-in with users to determine how things are going, in general
• Immediately contact the Help Desk with issues that directly impact the ability of users to do their work
• If users report they did not receive two emails, one with their user name and one with their password, mentors should first search the person’s email and then contact SSAM
Outage Messages: What to do with them?

Mentors should:

• Follow instructions
• Review all materials referenced
• Route out instructions to users

Mentors should:

• Review and familiarize themselves with all documents sent by DHS. Support Plan Known
  Issues 6-16-17 are on MnCHOICES County Link.
• Forward documents to all users who need them to work in the Support Plan
• Use MTZ-SP to review the features and functions which will help provide technical support to
  all users in the agency
• Check-in with users to determine how things are going, in general
• Immediately contact the Help Desk with issues that directly impact the ability of users to
  do their work
• If users report they did not receive two emails, one with their user name and one with
  their password, mentors should first search the person’s email and then contact SSAM

Users should:

1. Review and familiarize themselves with all documents sent by DHS. Support Plan Known
   Issues 6-16-17 are on MnCHOICES County Link.
2. Take the following steps to update their URL:
   • Log in using this URL: https://mnch-supplan.dhs.state.mn.us/login.aspx
   • Add the URL to your "Favorites"
3. Log in and confirm you are in the updated MnCHOICES Support Plan websites:
   • The Support Plan website site is similar to the MTZ-SP website in looks.
Release Notes: Outline the changes being made

Companion Document: shows screen shots of the changes

Known Issues:
• Outlines the defects and work arounds for a computer application
• Updated after a release
MnCHOICES Assessment 17.2.1 Release: Example
MnCHOICES Assessment Outage 17.2.1

• 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
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 “pesononal” to “personal”
# Release Notes: A List of what was fixed

<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Description</th>
<th>Change(s) made</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Intake person data was not populating into the assessment.</td>
<td>The intake fields were populating intermittently and incorrectly into the Person and Activity screens.</td>
<td>With this fix, intake fields for new assessments will more reliably populate from the Edit Person (Person and Activity) screens.</td>
</tr>
<tr>
<td>2.</td>
<td>Made Person screen demographic switching improvements.</td>
<td>When a user created/updated an assessment, a reassessment or 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.</td>
<td>Demographic switching has not been reproduced during in-house testing of the 17.2.1 release. We do not expect data switching to occur for users after this statewide release. As a precaution, please read <strong>Important to note</strong> above.</td>
</tr>
</tbody>
</table>
| 3. | Assessment data now carries over from an assessment to the corresponding reassessment – ADLs / IADLs / Employment / Housing domains, screening documents and service agreements. | 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: | The 17.2.1 version of the MnCHOICES Assessment displays the correct data for all affected domains and reports. |
Companion Document: 17.2.1

MnCHOICES Assessment Version 17.2.1–Release Notes Companion

7/18/2017

Purpose

• Provides Assessment users a visual, step-by-step document that describes how to identify and use the changes made to specific functions and tasks in the MnCHOICES Assessment 17.2.1. Also describes any changes made to the content of MnCHOICES Assessment in 17.2.1.

• Examples slides
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.
6. MnCHOICES incorporates the new DHS logo
Reassign button populates with assessor names

<table>
<thead>
<tr>
<th>Id</th>
<th>Assignable Date</th>
<th>Last Name</th>
<th>First Name</th>
<th>MI</th>
<th>Sub-Type</th>
<th>Assessment Date</th>
<th>Result Date</th>
<th>Date of Birth</th>
<th>Age</th>
<th>M/F</th>
<th>PML</th>
<th>Offline</th>
<th>Reassign To</th>
</tr>
</thead>
<tbody>
<tr>
<td>17514</td>
<td>11/20/2014</td>
<td>Anderson</td>
<td>Willie</td>
<td>E</td>
<td>New Assessor</td>
<td>3/10/1942</td>
<td>F</td>
<td>76</td>
<td>M/F</td>
<td>No</td>
<td></td>
<td>Reassign</td>
<td></td>
</tr>
<tr>
<td>17508</td>
<td>11/20/2014</td>
<td>Cruise</td>
<td>Tom</td>
<td>T</td>
<td>New Assessor</td>
<td>5/17/1975</td>
<td>M</td>
<td>72</td>
<td>M/F</td>
<td>No</td>
<td></td>
<td>Reassign</td>
<td></td>
</tr>
<tr>
<td>17510</td>
<td>11/20/2014</td>
<td>Hanks</td>
<td>Tom</td>
<td>T</td>
<td>New Assessor</td>
<td>6/18/1976</td>
<td>M</td>
<td>70</td>
<td>M/F</td>
<td>No</td>
<td></td>
<td>Reassign</td>
<td></td>
</tr>
<tr>
<td>20535</td>
<td>1/6/2016</td>
<td>TESTRECORD</td>
<td>AVOCADO</td>
<td>M</td>
<td>New Assessor</td>
<td>1/19/2016</td>
<td>12/3/2014</td>
<td>13 mths</td>
<td>M/F</td>
<td>No</td>
<td></td>
<td>Reassign</td>
<td></td>
</tr>
</tbody>
</table>
Support Plan Known Issues

- Collects known issues, defects and workarounds
- Items are prioritized for fixes for future releases
- Updated after each release

MnCHOICES Support Plan Known Issues – rev. 6/16/17

Contents

MnCHOICES Support Plan Known Issues – rev. 6/16/17

Search tab ....................................................... 1
My Plans tab....................................................... 2
Services tab....................................................... 2
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Service Line screen.............................................. 2
Service Agreement Report....................................... 3
Rate Input Report.............................................. 3
Rate Inputs....................................................... 3
Goals tab......................................................... 3
Needs Summary tab............................................. 3
Eligibility tab.................................................... 4
Next Steps tab.................................................. 4
About Plan tab.................................................. 4
Printing........................................................... 4
Risks .............................................................. 5
Support Instructions............................................ 5
General (applies to more than one tab)......................... 6
Lunch on your own: Noon to 1 p.m.
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
## 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>CSP</td>
<td>Needs Summary</td>
<td>Information from each MnCHOICES Assessment domain about the person’s needs (displays as multiple tables)</td>
<td>Assessment</td>
<td>N/A</td>
</tr>
<tr>
<td>CSP</td>
<td>Needs Summary</td>
<td>Information from Support Planning Implications from each of the MnCHOICES Assessment domains</td>
<td>Assessment</td>
<td>CSP</td>
</tr>
<tr>
<td>CSP</td>
<td>Eligibility</td>
<td>Information from Eligibility Summary in MnCHOICES Assessment</td>
<td>Assessment</td>
<td>N/A</td>
</tr>
<tr>
<td>CSP</td>
<td>Referrals</td>
<td>Information from MnCHOICES Assessment domains labeled “Referrals Needed”</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>Information from caregivers identified in Caregivers domain in MnCHOICES Assessment, notes/comments</td>
<td>Assessment</td>
<td>CSP</td>
</tr>
<tr>
<td>CSP</td>
<td>Caregiver</td>
<td>Information from caregiver interview notes/comments in MnCHOICES Assessment</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>

Rev. 6/5/2017
Key Features: Build and Print: CSP/CSSP Crosswalk

• Tabs identified to build: CSP and CSSP
• Description of content links to visual of the information
• Editable in: Assessment or Support Plan
• Does this section print? If so, where?
Tour of the Build and Print: CSP/CSSP Crosswalk
Support Plan Known Issues

Known Issues

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

### My Plans tab

<table>
<thead>
<tr>
<th>Issue</th>
<th>Workaround</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change My Agency button may be displayed even if it is not needed</td>
<td>none</td>
</tr>
</tbody>
</table>

### Services tab

<table>
<thead>
<tr>
<th>Issue</th>
<th>Workaround</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Add Agreement button may not be visible when the navigation buttons take up two or more lines</td>
<td>Reduce the zoom level of your browser (hold down the Control button and click the minus button in Internet Explorer and Google Chrome) until the Add Agreement button is visible</td>
</tr>
</tbody>
</table>
Known Issues: Walk through
Examples of the types of Known Issues

• Defects, some have work arounds
• Expected to see and didn’t
• Did not expect to see
Example, Defects

• **Search tab**: Fields may become locked. **Workaround**: Hit F5 to refresh the page

• **Search tab**: Modified by does not display properly. **Workaround**: none

• **About Plan tab**: When changing the status of a plan the “Date this document was mailed” will incorrectly display that it can or cannot be edited. **Workaround**: Navigate to a different tab and return. The control will update correctly.

**Defects list is used to prioritize release fixes**
Examples, Expected to See

• **Search:** Middle initial does not display. **Workaround:** The middle initial displays on the Person Information tab.

• **Search Tab:** Assessment does not appear in the Support Plan. **Action:** Verify the Assessment has been assigned to an assessor in the Assessment application.

• **Printing CSSP/Rate Plan:** Service frequency is not printing. **Workaround:** Enter this information in the support instructions box for the services.
Examples, Expected to See

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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 Traillink
- Support Plan Try It! Companion Document
- Which Support Plan tabs do I use to create a CSP/CSSP?
Support Plan User Manual - First place to go
Questions
It’s Time For A Break

Break: 5 minutes & Questions on Return
User receives error message when logging in

MnCHOICES mentor should

• check the URL

• Is the user in the training zone or production URL?

• Is the user logging into the correct URL?
Here’s why: demonstration

Training Zone Login page
https://mnch-supplan-train.dhs.mn.gov/

Production Login page
https://mnch-supplan.dhs.state.mn.us/login.aspx
Assessment: Update your assessment

- Make changes in MnCHOICES Assessment
- Run Eligibility
- Move over to the Support Plan

Support Plan: Update your plan

- Move to a different tab
- Move back to the tab with the data update
- Review data
- If needed, log out and log back in
We have a case aide that case manager assigned her as the Plan Aide. Does not show up under her “my plans”; however, she has been able to find them by searching under the person’s name.

My Plans View Options
**Question:** Despite having a different plan owner, and not having my name attached to the plan, I was able to go into a closed CSP, make changes to the about section and the goals and save them to a closed CSP. Should I be able to do this?

**Answer:** Yes, any Support Plan user, if they search and find a person or plan, can go into another plan and make changes.

- Lead agencies access private data only when necessary
- Last modified by: defect, future release
- Roles: Future enhancement
Follow your lead agency protocol

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

Lead agency choice
Issue

Case manager needs changes made to a CSP with status of closed

Solution

4. **Practice:** Assessor and case manager review the CSP prior to the assessor closing it

4. **Troubleshooting:** The mentor submits the Help Desk from marking it policy and requests the CSP to be open

4. **Problem solving:** unable to open, case managers make notes in CSSP
General notes in the About Plan

• Used in the CSSP to create a summary of the person’s service plan

• About Plan notes from the CSP can be deleted

• Write a person-centered introduction to the person. Focus on strengths, talents, interests, important to, what people like and admire about the person. Can also include what they would want people to know about how to best work with them.
Notifications Messages: Services Tab & Dates

Program Agreement End Date has to be on or before End Date of Support Plan 06/30/2018. The original program agreement End Date was 06/30/2018.
Decrease notifications in the Services Tab

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

3. 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
Question: *Do we have to send out new CSSP’s every-time we create one and close one? For any change?*

Answer: When there are changes to the plan that affect how the service is provided (e.g., changes to service frequency, number of units, updated tasks assigned to the provider, addition of new a provider, etc.) you must provide the person and applicable providers with an updated plan.
Notifications: Date changes

To decrease notifications change dates in this order

1. Service line
2. Service agreement
3. About Plan

Follow agency protocol when making changes to date ranges

• Any date change deletes the service line rate summary
Question: Why would we close the CSSP?

Answer: When the CSSP is created the case managers provides the person a copy of their support plan. Once any changes are made after the person reviews it it is closed. This captures the point in time you created the document.

If a change in service comes along you can create a new CCSP on top of the old and make the change and close it capturing the next point in time.
Thank you

MnCHOICES Business Team | DSD