Post-launch Call, 10/12/2017

MnCHOICES Support Plan Launch Calls
Welcome & Introductions

MnCHOICES

- Business Team Supervisor
- Support Plan Project Manager
- Support Plan Business Analysts
- Policy staff
- Operations staff
Housekeeping

• 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
Post Launch Call Agenda

For: Launch leads and mentors who have launched into Support Plan

Purpose: To ask questions, provide training and updates for Support Plan Production users.

Agenda:

1. MnCHOICES Support Plan Follow-up and Updates
2. Lead Agency questions about the computer application
MnCHOICES Office Hours, first Friday of the month, 9:30 to 11 a.m. – December 1, 2017. November 3rd is cancelled.

Post launch calls, Thursdays, 9:30 to 11 a.m.

• October 12, 2017
• October 26, 2017 (Office Hours)
• November 9 and 16, 2017
• December 14, 2017
User Access in the Support Plan
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
Support Plan User Access
Webinar archive: Disability Services Division
Webinar Schedule
Which Support Plan Tabs do I use to create a CSP/CSSP?
Support Plan: Adding users

- Identify the Systems, Security and Access Management (SSAM) Security Liaison for your lead agency

- Submit a request for the addition or change needed to your SSAM Security Liaison

- The SSAM Security Liaison will submit the “MnCHOICES Support Plan Request and Authorization Form” to SSAM
Need to make changes to a closed CSP

**Issue**

1. Case manager reports to the Support Plan mentor that changes need to be made to a CSP with status of closed

2. Mentor submits a ticket to the MnCHOICES Help Desk to reopen the CSP with details of why it needs to be opened

- **Problem Data incorrect:** The case manager can make notes in the CSSP or for some changes re-open the assessment

- **Solution Data Incorrect:** **Work flow change:** Assessor and case manager review the CSP prior to the assessor closing it to ensure data is correct

- **Problem CSP dates are incorrect:** correct the dates in the About Plan in the closed CSP but they receive notification error
Recommendation: Create services in the CSSP

• Calculate rates in CSSP to decrease the need to *recalculate rates caused by date changes*

• Creates services in CSSP and not CSP
  
  • If the services were created in the CSP and the planner needs to change the About Plan start date, it requires several steps of date changes - in this order

  Service lines

  Service Agreement

  About Plan
Services tab and date conflicts in the Rate Plan and CSSP

Date options

1. Apples-to-Apples

Plan dates are set in the About Plan tab for all plans (CSP, Rates and CSSP)

Service Tab constraints for dates

1. About Plan can be more than one year

2. Service agreement only allows one year, but can do more than one service agreement to accommodate a longer span

3. Service line has to be within the date of the service agreement
To minimize notification messages

1. For each plan begin at the About Plan tab and choose the date

2. Working ahead in the CSP?
   • Pay attention to dates – set them in the About Plan tab

2. Before you close your CSP
   • Service Agreement: approved
   • Service lines: Choose pending or approved
• Captures point in time

• Closed when person has agreed on initial plan

• Create CSSP & close each time adjust the plan

• Footprints of the plan changes: as each change is captured
How to close a CSSP?

Problem Solving

1. Go back to the Training
2. Go to User Manual
3. Answer: About Plan Tab, Change Status to Closed
Notifications: Service Agreement & Service Lines

Provide direction for entry

• Plan dates aren’t aligning

• County of Residence needed to create a service and calculate the rate correctly

Provides knowledges

• Click Okay and proceed with work
The combined rate for all PERS services should not exceed $3,000 per year.
Questions
Thank you!

MnCHOICES Support Plan
Post-Launch Call