New Mentor Orientation

MnCHOICES Team
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

What you like best about this season
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
MnCHOICES: Understanding the big picture

- Intake
- HRA
- Assessment Reassessment HRA Full
- Community Support Plan
- Coordinated Service and Support Plan & LTSS Improvement Tool
- Rate Plan

MnCHOICES

Support Plan
What is the MnCHOICES Assessment?
A change in tools and process

Replaces 3 assessments:

1. Developmental Disability Screening
   *DD Waiver*

2. Long-Term Care Consultation
   *CADI, CAC, BI, CSG etc.*

3. Personal Care Assistance
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 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?
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 (BI both NB and NF)
- Community Alternative Care Waiver (CAC)
- Community Alternatives for Disabled Individuals Waiver (CADI)
- Consumer Support Grant (CSG)
- Developmental Disability Waiver (DD)
- Elderly Waiver (EW)
- Personal Care Assistance (PCA)
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
Timelines for assessment and support planning

- Assessment Accepted
- Assessment Conducted
- CSP Complete
- CSSP Complete

20 Calendar Days

Deadline to conduct Assessment
20 Days since accepted

40 Calendar Days

Deadline to complete CSP
57 Days since accepted

10 Work Days

Deadline to complete CSSP
52 Days since accepted
The Build: MnCHOICES Support Plan
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
- Planner: Case Manager or Certified Assessor
- Preferences and goals
- Approves services
Evaluation built into CSSP Process: The LTSS Improvement Tool

- Is a set of questions built into the MnCHOICES Support Plan application
- Created to evaluate the person’s experience with services and service delivery
- Completed during mid-year quality visit

Phase 1

Person’s Evaluation of his or her Coordinated Service and Support Plan (CSSP)

Person’s Evaluation of his or her Service Provider
Data Stream

Carries information from Assessment to Support Plan
Rate Plan

Access to RMS

- Rate Plan
- CSP
- CSSP
Questions
User Support

- Mentors
- Help Desk
- Resources
MnCHOICES Mentors Role

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

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 policies/practices are incorporated into MnCHOICES

• Share your wisdom and knowledge

• Motivate users and encourage professional development
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
• Distribute Communications
  • Outages
  • Release & companion notes
  • Other
• Attend meetings and trainings
MnCHOICES New Mentor Orientation
MnCHOICES Mentor Alliance (MMA)
MnCHOICES Help Desk
MnCHOICES Matters
MnCHOICES CountyLink
MnCHOICES Office Hour
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 pm
• Web-ex Option, 2 times a year
• Shortly before release
• Next Meeting
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.
Discussion role of the mentor

• 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 do you need to support your users
MnCHOICES Mentoring: What mentors tell us
MnCHOICES Mentoring and the Mentoring Experience

Key Benefits

• Problem solving & issues with logging in
• Communication & updates
• Available resource
• Go to person
• Expert who attends meetings, webinars and calls

Number of Mentors

• Small agencies: 2, supervisor and person with instructions
• One mentor in each lead or contracted agency location
• Same mentor for Assessment, Support Plan and RMS mentor
• Added additional Support Plan mentors
Key mentor skill set

- Interest in being a mentor
- Able to attend mentor meetings and trainings
- Patience to learn and teach
- Tech abilities and enjoys troubleshooting
- Program knowledge
- Time and patience to troubleshoot and keep up with changes and communications
- Ability to share information and communicate
- Organized, available, flexible
- Flexible schedule with time to assist others
Do we need a break?

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

- Qualifications
  - Training
    - Certification
    - Recertification
  - Tips
Only certified assessors can use MnCHOICES Assessment to conduct an assessment

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

MnCAT (Certified Assessor Training)

Recertification

Professional Development

Certification

Step 3

Step 2

Step 1

Qualifications + Experience

MnCHOICES

Certified Assessor

Application

Step 3

Principles

Step 2

Foundation

Step 1
MnCHOICES Training and Recent Webinars

The MnCHOICES team is committed to providing you with the skills and training you need to use MnCHOICES effectively. Through classroom training, live and recorded web-based training sessions, virtual presence communication (VPC) sessions, modules and job aids, we seek to teach skills that allow you to perform your assigned job duties to the best of your ability.

All documents more than 2 years old have been Archived.

Assessment

MnCHOICES Certified Assessor Training (MnCAT) Steps 1 and 2

MnCAT Process: Instructions and Checklist for Lead Agencies
MnCAT Process: Instructions and Checklist for Qualified Candidates
MnCAT Sample Certified Assessor Tracking Form
Report on Education and Experience of MnCHOICES Certified Assessors - Instructions
MnCAT Step 1 - Foundation

• **Overview** *(30-45 min.)*
  
  ➢ **Objective:** Gain a broad understanding about MnCHOICES Assessment
  
  ➢ 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
Per your lead agency mentors may track assessors certification

• MnCAT Instructions

• MnCAT Tracking Form

• Education and experience

Let’s go out to MnCHOICES County Link
Objective: To review, maintain and achieve specific certified assessor core competencies that help prepare the candidate for the MnCHOICES Assessment 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 Assessment 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)
• 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)
Assessment Scenario

• Assessment in the MnCHOICES Training Zone

MnCHOICES Step 3 Guidebook

• Final Instructions to Complete Step 3
• Assessors meets with the Multidisciplinary team
  • Multidisciplinary Learning lab/Lecture Guide

MnCAT Step 3

Application - Overview
Assessment Domains Quick Study
Assessment Scenario
Guide Book
Key Messages
Memory Aid for Assessment
Multidisciplinary Learning Lecture/Lab (MLL) Facilitator Guide
Parts 1, 2, and 3: Tracking Document
Part 2: Content Map
Part 2 Refresher: Activities of Daily Living Quick Study
Part 3: PowerPoint
Relationship and Progression of Plans
Screening Tools List
To and For Values: Adult Scenario
# Instructions for Lead Agency Scheduled Access to MnCHOICES Training Zone and MnCAT Step 3 – Secret Links

<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>Step 3 – Part 1</strong></td>
<td>Qualified Candidates</td>
<td>Yes</td>
<td><a href="http://pathlore.dhs.mn.gov/stc/dsd/psciis.dll?course=dsd&amp;code=MNCCH8001">Step 3, Part 1, Track A =</a></td>
</tr>
<tr>
<td><strong>Track A</strong></td>
<td>Qualified Candidates</td>
<td>Yes</td>
<td><a href="http://pathlore.dhs.mn.gov/stc/dsd/psciis.dll?course=dsd&amp;code=MNCCH8001">Step 3, Part 1, Track A =</a></td>
</tr>
<tr>
<td><strong>Step 3 – Part 1</strong></td>
<td>Mentors, Supervisors, All other Users</td>
<td>No</td>
<td><a href="http://pathlore.dhs.mn.gov/stc/dsd/psciis.dll?course=dsd&amp;code=MNCCH8003">Step 3, Part 1, Track C =</a></td>
</tr>
<tr>
<td><strong>Track C</strong></td>
<td>Mentors, Supervisors, All other Users</td>
<td>No</td>
<td><a href="http://pathlore.dhs.mn.gov/stc/dsd/psciis.dll?course=dsd&amp;code=MNCCH8003">Step 3, Part 1, Track C =</a></td>
</tr>
<tr>
<td><em>Step 3 – Part 2</em></td>
<td>Qualified Candidates</td>
<td>Yes</td>
<td><a href="http://pathlore.dhs.mn.gov/stc/dsd/psciis.dll?course=dsd&amp;code=HMNCNCH8009">Step 3, Part 2 – Content =</a></td>
</tr>
<tr>
<td><strong>Content</strong></td>
<td>Qualified Candidates</td>
<td>Yes</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>Step 3 – Part 3</strong></td>
<td>Qualified Candidates</td>
<td>Yes</td>
<td><a href="http://pathlore.dhs.mn.gov/stc/dsd/psciis.dll?course=dsd&amp;code=MNCCH8010">Step 3, Part 3 - Test =</a></td>
</tr>
<tr>
<td><strong>Learning Lab</strong></td>
<td>Qualified Candidates</td>
<td>Yes</td>
<td>Provide the link below to candidates only after completing Step 3 Part 3</td>
</tr>
<tr>
<td><strong>Step 3 Test</strong></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>
</tbody>
</table>

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5/22/2018 | Minnesota Department of Human Services | mn.gov/dhs
Complete and retain for your records: You no longer need to submit to DHS

- MnCAT Sample Certified Assessor Tracking Form
- Report on Education and Experience of MnCHOICES Certified Assessors – Instructions
- Report on Education and Experience of MnCHOICES Certified Assessors – Spreadsheet

Instructions will be updated requesting the mentor to retain certification documents for review upon request
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: Recertification Instructions and Guidance**

**Reinstating a lapsed certification**

If the lapse will be 31 days or more

- Take steps to reassign work to another certified assessor as soon as possible
- **Update the person’s security access** to the MnCHOICES assessment so he or she no longer has access to edit assessments and instruct the assessor to no longer complete CSPs
- Create a process to complete CLU’s and the person will be promoted to complete a test to receive certificate
- 366 days+ retake the MnCAT process
Questions
Time for a break?

Take a break. You deserve it!
Where MnCHOICES Assessment and Support Plan meet
MnCHOICES Training Zones
Training Terms

• TrainLink
• Training Zone
• MTZ-A
• MTZ-SP
• User Names
• Passwords
All MnCHOICES training is taken and recorded for users.
Examples include MnCAT, Support Plan access and navigation training, registrations for MMA and webinars.
TrainLink Unique Key Request

Unique Key Request Form

- Add a new user
- Change information

> TrainLink

Unique Key Request Form

Please check the Unique Key Search before completing and submitting the form.

*Required Fields are marked by asterisks*

Type of Request*: First time user

5/22/2018 Minnesota Department of Human Services | mn.gov/dhs
MnCAT Step 4: Tools on TrainLink

1. 
2. 

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.

Course Content

MnCHOICES Step 4: Instructions

Instructions for documenting Continuing Learning Units (CLUs).

- 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>
MnCAT Step 4: Tools on TrainLink

3.

Your status in this course is: Enrolled
Warning: If you have a pop-up blocker, it may prevent online content from launching.

Continue Course | Restart Course | Cancel Th

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.

Continue | Restart
Status: In Progress | Required: Yes, in order

4.

Recertification Certificate

Continue | Restart
Status: In Progress | Required: Yes, in order

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.
Recertification CLUs

- 45 CLU’s
- 12 CLUs person centered

Need to meet both requirements to receive a certificate
Person Centered Activity:
Update CLU’s
Recertification CLU Requirements

45 CLU’s

- 12 CLUs person centered

Need to meet both requirements to receive a certificate
MnCHOICES Training Zone or MTZ

- 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
  https://mnch-supplan-train.dhs.state.mn.us/login.aspx

Each application it’s own URL & User names
MTZ-A User Names

https://mnchoices-train.dhs.state.mn.us/mnch/default.aspx#/LoginPage

<table>
<thead>
<tr>
<th>MTZ Login</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Usernames</strong></td>
<td>Are assigned by DHS to a specific Lead Agency</td>
</tr>
<tr>
<td></td>
<td>Half of assigned usernames are under Lead Agency 1</td>
</tr>
<tr>
<td></td>
<td>Half of assigned usernames are under Lead Agency 2</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>
</tr>
<tr>
<td></td>
<td>Having two names allows Lead Agency users to practice transferring open Intakes between “Lead Agencies.”</td>
</tr>
<tr>
<td><strong>Passwords</strong></td>
<td>Instruct users to NOT change the passwords provided to access MTZ</td>
</tr>
<tr>
<td></td>
<td>Assigned MTZ passwords do not expire for 9,999 days or until 2041</td>
</tr>
<tr>
<td></td>
<td>Users have 99 attempts to enter password correctly in MTZ before being locked out</td>
</tr>
</tbody>
</table>
MTZ-A User Name Configuration

MnCHOICES Training Zone Information for Banana County

- Agency abbreviation = BAN
- **Given number of users split between two groups**

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
MTZ-A Users

- Primary mentor holds the user names and password for MTZ-A
- Each user name 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:
  - Select lead agency name = Banana County 1
  - Type in user name = BAN001
  - Type in password
## 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><strong>MTZ is only to practice</strong></td>
<td><strong>PROD is only to do real work</strong></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>
### 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>
MnCHOICES Support Plan Training Zone MTZ-SP

https://mnch-supplan-train.dhs.mn.gov/

- Separate user names and passwords
- Rates, CSP and CSSP
- MnCHOICES County Link Training Page
- TrainLink: MNSP1000
- Where assessors (CSP), planners (CSSP) and rates users work
Who has MTZ-SP User Names?

Primary mentor (lead agency) holds the

• User names, e.g. Banana1

• Passwords

• Duplicate assessments for training

• If access to MTZ-A your assessment maybe open for all others close the duplicate assessment
Using the Training Zone – Work Flow

Have your training mirror your agency work flow

• Assessor completes Assessment and CSP
• Planner/case manager does CSSP
• Rate calculations

Try out your work flow in the Support Plan and create discussion across roles
TrainLink Support Plan Training MNSP1000

Use the MnCHOICES Support Plan Try It! Companion document for modules

• Try It! Exercises
• Use the Work Flow in Try It! Companion for CSP
• User Manual in MnCHOICES Support Plan (PROD & MTZ-SP)
Support Plan Try It! Companion Document

Courtesy Reminder

• Suggest training by role
• Support Plan module list in suggested order
• Try It! Instructions
• Work Flow - Which tabs do you use to create
• How do you know you are done?
## Support Plan: tabs used to create a CSP and CSSP

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

<table>
<thead>
<tr>
<th>Search</th>
<th>My Plans</th>
<th>Person Information</th>
<th>Goals</th>
<th>Needs Summary</th>
<th>Eligibility</th>
<th>Referrals</th>
<th>Caregiver</th>
<th>Services</th>
<th>Support Instructions</th>
<th>Risk</th>
<th>Next Steps</th>
<th>About Plan</th>
<th>Log Out</th>
</tr>
</thead>
</table>

- Person Information
- Goals
- Needs Summary
- Eligibility
- Referrals
- Risk
- Next Steps
- About Plan

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

<table>
<thead>
<tr>
<th>Search</th>
<th>My Plans</th>
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<th>Needs Summary</th>
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<th>Log Out</th>
</tr>
</thead>
</table>

- Person Information
- Goals
- Caregiver
- Services
- Support Instructions
- Risk
- About Plan
## 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>
</tbody>
</table>

Rev. 6/5/2017

5/22/2018  Minnesota Department of Human Services  |  mn.gov/dhs  85
Questions
Lunch on your own: Noon to 1 p.m.
Questions
MnCHOICES County Link

Purpose

To provide mentors the tools needed to support MnCHOICES computer application users
MnCHOICES

• MnCHOICES Assessment, the Assessment (MnA)
• MnCHOICES Support Plan, the Support Plan (MnSP)

NOT

MnCHOICES meaning the Assessment
MnSPA meaning the Support Plan
MnCHOICES County Link Tour

Landing Page
Assessment
Communication
Forms
Help desk
Mentors
Support Plan
Training

MnCHOICES
MnCHOICES is a single, comprehensive, web-based application that integrates assessment. Fact Sheet is an overview of the web-based application.

DHS has redesigned the MnCHOICES site. Check out the Quick links section below and the

Latest News & Updates
DHS recently designed a new way to gather feedback on the recipient experience with Supports (LTSS) Improvement Tool in fall 2017 as part of the MnCHOICES Support Plan. Visit the Frequently asked questions about the new LTSS Improvement Tool.
Revising MnCHOICES Mentors

• **Add to or update MnCHOICES contact list online form**

• MnCHOICES email list for all outage messages, trainings and webinars announcements
Purpose: To facilitate communications and processes between lead agencies who are either the County of Financial Responsibility (CFR) or the County of Residence (COR) on behalf of a Minnesota resident when completing MnCHOICES activities.

Check your list to:

- ensure it’s updated and
- Being monitored by your agency.
**Purpose:** To make changes to a MnCHOICES computer application

Release changes include

- Editing (typos, wording)
- Enhancing functionality
- New features

**Examples**

- Changing of the CADI acronym
- Enhancing Functionality: Making changes to printing
- New features: Adding copying data from one years CSSP to CSP
How to read an outage schedule - Releases & Pilot

- 2017-2018 Anticipated Assessment Release and Outage Schedule

Messages

- 20-day, 5-day and day of scheduled Outage Messages
- Unscheduled outage messages
- Training and other communications

Mentor Role in unscheduled outage: Report to the Help Desk
MnCHOICES Mentor Key Terms

- Outage
- Release
- Pilot
- All Clear/Release Completed
- Release Notes & Companion Documentation
- Known issues
Mentor’s Role: To share all messages and documents with your users

Outage: Training Zone (MTZ) and/or Production (PROD)

Outage message: Day of release

Message day after the release
• MnA: All Clear
• MnSP: Release Completed

Message documentation includes
• Release Notes and Companion Documentation
• Known Issues
CSP Printout Headings

Before
Heading labels on CSP printout do not display correctly.

After
Heading labels on CSP printout now align and display correctly.
Goals tab
Before

Goals created in the CSP are listed in order. The CSSP is created and the goals display in a different order.
Goals display in CSP and CSSP: After

After

Goals in the CSSP are displayed in order to match the CSP.
Before
Goal builder section is after the action steps for goals section.

After
Goal builder section is before the action steps for goals section.

5/22/2018 Minnesota Department of Human Services | mn.gov/dhs
MnCHOICES Support Plan User Access

1. Mentors Page
2. Security Access

MnCHOICES Support Plan (MnSP) Access

Revised March 5, 2018

MnSP required data privacy courses

All users of the MnCHOICES Support Plan are required to complete the Handling MN Information Security: Data Privacy Courses.

- Data Security and Privacy (15 minutes)
- How to Protect Information (35 minutes)
- Managing Security Information Problems (15 minutes)
- Federal Tax Information (10 minutes)
- Social Security Administration Information (15 minutes)
- Protected Health Information (PHI) (15 minutes)
- Data Security for County Staff and Assistants (10 minutes)

Guidance for registering for a user account to take and track the required training:

- Affiliation: Lead agency you work on behalf of
- Company name: If a contracted agency, enter your agency name here.
- Training role: Choose “county worker.” All agencies, including contracted agencies, should choose “county worker.” This helps us to ensure that you complete all required courses each year.
- Courses required for role: This field will fill automatically with the correct number of courses needed for you to gain MnSP access.

User access request and changes for the MnCHOICES Support Plan

Your lead agency and the Systems, Security and Access Management (SSAM) team coordinate access to the MnCHOICES Support Plan.

Requesting user access
Next Steps tab
Before

- Text box was too small
- Did not allow for easy viewing and display of multiple items

After

Larger scrolling text box was created to allow for more items and easy viewing.
Miscellaneous
Text box expand full screen: Before

User clicks on expand text box button:

Before: Full screen text box gets stuck behind the screen tab header with no way to reduce back down.
User clicks on expand text box button:

After: Full screen view is fully editable and can now be reduced back to normal view for printing.
Release Tips

Support Plan
After Release
Control F5 to update

Assessment
When allowable, update your Monday assessments over the weekend
MnCHOICES Support Plan v18.2 Release Notes and Companion Documentation

4/19/2018

Purpose of release notes and companion documentation
A visual, step-by-step document that describes how to use the changes made to specific functions and tasks for the MnCHOICES Support Plan (MnSP) computer application in version 18.2

• This release focuses exclusively on improvements.
• Changes do not require a change in URL address.

As you start working in the new MnSP release, here are the release notes:

Person Information
1. Issue: Heading labels do not display correctly on the CSP printout.
   Resolution: Improvements allow CSP printout headings to align and display correctly.

2. Issue: Health Insurance and Payer information copies to Providers section instead of adding blank row.
   Resolution: Improvements allow blank row to add without information populating from Health Insurance and Payer information section.

Goals Tab
1. Issue: Goals created in the CSP display out of order.
   Resolution: Improvements allow goals to display in correct order.
Help Desk
Hello! Help Desk Gurus are:

• Kong Vang & Dwayne Peterson
  • At times you may receive responses from others

• Need MnCHOICES Help?

• Help Desk Contact Form

• Help Desk email and phone number
Familiarize with MnCHOICES CountyLink

**MnCHOICES CountyLink** & How to bookmark

- 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
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 e.g. 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
Issue actually was

• User was in MnA using the Chrome browser

• MnA should use Internet Explorer
**Goal:** Is to assist the Help Desk by adding screen shots to your request for assistance. Provides more detail and is more efficient.

A great tool is the Snipping tool

- Screen Shots
- [MnCHOICES CountyLink](#) Bookmark me
  - Snipping Tool – How to Use It
Soap error message
• Reports an error running eligibility
• Only Help Desk can repair it
• Send a screenshot to the help desk
• Screen shots are AWESOME!!

Screen shots with Snipping or Snagit tool
• Pin to task bar
• Create shortcut
MnCHOICES is Installed in Offline Mode, please use the shortcut on your Desktop or Start Menu to run it.

The Server returned Messages, please check the Messages tab:
ORA-20998: Error generated by SwndxGlob.current_staff_id - Oracle error
ORA-00001: unique constraint (STATEWIDE.PK_COUNTRY_PID) violated
ORA-02063: preceding line from SSSW - Package specific values - SW_INDEX_ID:4191288, COUNTY:F1, PERSON_ID:206343800
ORA-06512: at "SSID_F1_PKG_COUNTRY_PID", line 256
ORA-06512: at "SSID_F1_PKG_COUNTRY_PID", line 48
ORA-06512: at "SSID_F1_PKG_COUNTRY_PID", line 88

OK
Performance: Check on your end

• Is it a network issue on the computer?
  - Is the computer on a wire connection such as Ethernet?
  - Make sure it’s plugged to Ethernet, not WIFI, because WIFI is sometimes unreliable.
  - Test the speed. Google “Speed Test” and run. Good speed is at least 5mb + download speed.

• Is there network issue affecting your whole county?
  - Check with other MnCHOICES workers to see how they’re doing.
Performance: when to send in a report?

Checked on your end and can’t seem to find anything? Send in a report and the Help Desk will check on their end.

Network issue

• Issue within the assessment

  ➢ User reports that the issue only occurs in a particular assessment and not others
MnSP Slowness? Report to Help Desk with node
Check the Known Issues: Barber Pole Work arounds

Check the known issues document

- Infinite Barber pole
- Barber pole does not go away when navigating the assessment

Work Around

- Log out, restart the browser, try again.
- Navigate to another group or domain.
What does this mean? Known Issues provides the answer

“State.mn.us not responding” message

Answer: Browser hasn't received all necessary data to display content

Don’t do this: It only gets worst if you continue to click or try to navigate elsewhere. Give it sometime and it will eventually respond.
Known Issues

**When?** Users report issues

**Where?**

- MnCHOICES CountyLink, Help Desk Page
- Troubleshooting documents, Assessment or Support Plan
- K-P, Known Issues
Known Issues MnA

- Organized by Domain or Tab
- Describes the issue
- Work around may be available
- Tour of Known Issues

MnCHOICES Assessment v18.1.1 Known Issues
4/11/2018

Purpose of known issues
This report is a compilation of known issues users and testers have reported to the MnCHOICES Help Desk and is intended to inform MnCHOICES Assessment (MnA) mentors and end users regarding:

- Problems that were reported and documented
- Function of MnA that is affected
- Description of the issue
- Steps to take to support the user
- A screenshot of the error message, if applicable

NOTE: When we fix a known issue, we will place it in the fixed issues section at the end of this document and cross the defect out. We will remove items from the resolved area with the next release.

Contents
- Purpose of known issues .................................................................................................................. 1
- All ................................................................................................................................................... 3
  1. Error saving data to the entity manager: ORA-00001: Unique constraint violated.......................... 3
  2. Windows 10 Compatibility........................................................................................................... 3
  3. Windows 10 and Java Compatibility............................................................................................ 3
  4. Refreshing the page in the browser or using F5 on the keyboard logs a user out of application .. 3
  5. Browser reports that "co.dhs" or "state.mn.us" is not responding.................................................. 3
Troubleshooting Documents with the Help Desk
• **Cache Clearing Instructions**
  
  • Note there are two instructions in one because they’re likely to be used together
  
  • Note important messages in the second 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
MnCHOICES Assessment 1.0 and Windows 10 Troubleshooting

Who needs the message?

All lead agencies updating to Windows 10 and all lead agencies experiencing problems with Windows 10 today.

Internet Explorer 11 is the only supported browser for MnCHOICES Assessment 1.0. This is because of the web application’s dependence on Silverlight. DHS will not support any other browser (e.g. Firefox, Chrome, Edge, Safari, Opera, etc.).
MnSP Troubleshooting Example: Change Plan Dates

**Why?** A Troubleshooting document is created when several users experience the same issue and instructions are more lengthy than a work around.

Example: Copying of plans and dates and date spans need to be changed.

**Change plan dates when prepopulated 4/6/18 (PDF)**
Questions about the Help Desk

We are looking forward to working together
THANK YOU
Follow Lead Agency protocol

• Lead agencies using SSIS
  o SSIS Administrator provides user access to MnA-PRD

• If F1 Agency
  o Contact primary mentor who submits user access forms to Help Desk
1. Lead agency protocol of providing a user access
2. Submit request to SSIS administrator
3. If F1 County submit your access form to the Help Desk
4. Inactive users: Inactive User reports
Part 1: MnCHOOSES Support Plan New User Notification

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

6/5/2017

Hello MnCHOOSES Support Plan,

This post is to inform you of your new account on the MnCHOOSES 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 MnCHOOSES 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://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
Thank you

MnCHOICES Business Team | DSD