



MnCHOICES Mentor Alliance Meeting June 4, 2019

Introducing MnCHOICES team



Amy Alexander - MnCHOICES policy

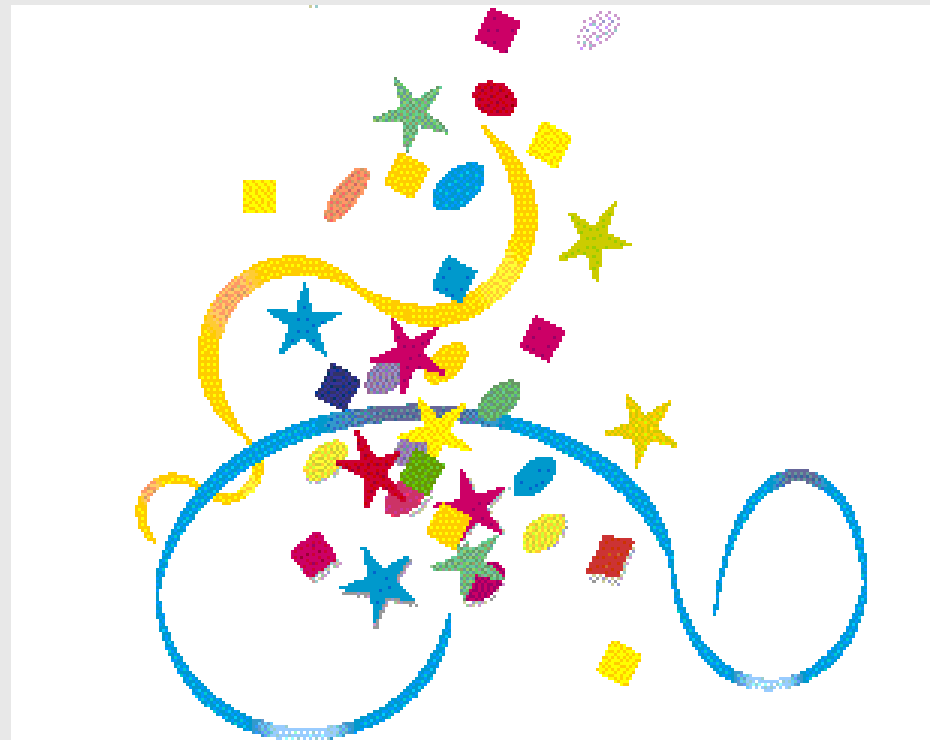
Beth Siewert - MnCHOICES policy

Denise Hauge - MnCHOICES
communication

Teresa vanderBent - MnCHOICES
training

Kong Vang - MnCHOICES help desk

Sarah Jones
Case Management Policy Specialist



MnCHOICES at Odyssey



Declutter your MnCHOICES information - Aug. 1, 1 to 2:15 p.m.

- Recognize the purpose of each of the resources for MnCHOICES information.
- Choose the resources you need and organize them in your favorites for ready access.
- Subscribe to the resources you need to support your work.

MnCHOICES at Odyssey: OBRA

OBRA Level II for Persons
with Developmental
Disabilities

Date: August 1

Time: 1 to 2:15 p.m.



MnCHOICES at Odyssey: MnCHOICES Assessment 2.0

What's the story

- Understand the guiding principles used in developing the MnCHOICES Assessment 2.0 application
- Learn the importance of a conversational person-centered assessment
- Gain knowledge of how assessment content integrates complex program rules to determine eligibility



Technical Specifications: Updated and moved

Technical specifications for MnCHOICES applications

[MnCHOICES Assessment 1.0 Technical Specifications](#)

[MnCHOICES Support Plan Technical Specifications](#)

[MnCHOICES Assessment 2.0 Technical Specifications](#)

- MnCHOICES CountyLink
- Mentor page
- Review revisions: MnA 1.0 and MnSP

Purpose: To provide technical support to agencies as they continue to implement and manage the MnA and MnSP applications.

Email voting decision: Significant majority voted to move to every other month

- June 7: No call, MMA
- July 5: No call, Independence Day holiday week
- Aug. 2: Next scheduled call

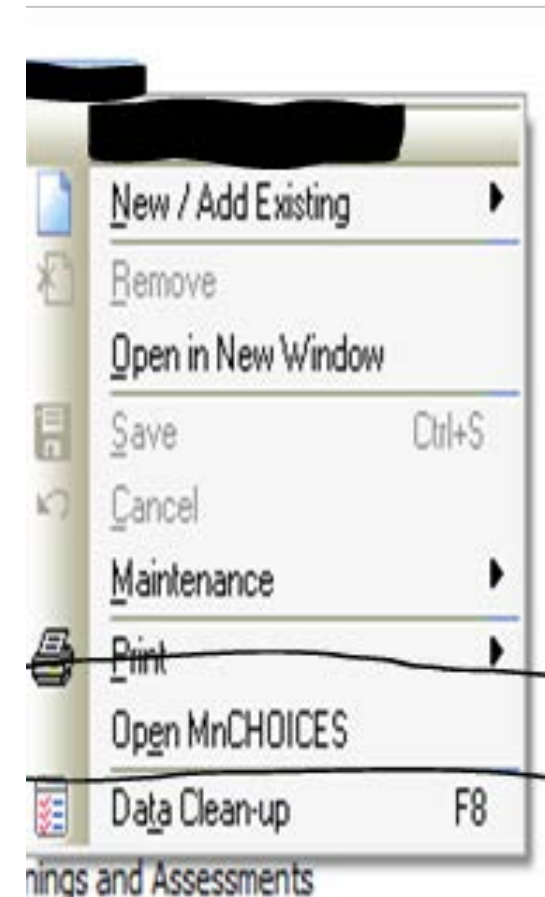


MnCHOICES Assessment 1.0



Removal of MnA button from SSIS

- May release of SSIS 19.2
- Removed the MnA link from SSIS
- Users access MnA through the [MnA URL](#) only
- Lead agencies continue to use SSIS to manage MnA 1.0 user access including user ID's and passwords to validate users logging into MnA



MnA 1.0 future releases

- **Maintenance Mode:** No releases without review
- **Request made:** Request reviewed
- **Project:** If review justifies change then it becomes a project
- No regularly scheduled releases



MnA 1.0: Silverlight support

Microsoft will support Silverlight v. 5

- Until October 12, 2021
- For devices running Windows 10 and using Internet Explorer 11
- **Updated MnA 1.0 Technical Specifications**



Self Reporting in TrainLink

I would like to add my CLU's to my recertification course but it won't allow any more than 45 CLU's. **How can I keep track of my training?**

- MnCAT recertification course closes after the 45 CLU's are entered into the TrainLink
- Use the TrainLink self-reporting feature

MnCAT Step 4 – Recertification

[CLU Decision Tree](#)

[Continued Learning Activity Cover Sheet](#)

[Explanation about Statewide List of Certified Assessors](#)

[Instructions for self-reporting learning activities in TrainLink](#)

[MnCAT Step 4: Certified Accessor Quick Study](#)

[MnCAT Step 4: Lead Agency Quick Study](#)

[MnCAT Step 4: Recertification Instructions and Guidance](#)

[Person Centered Requirements and Certified Assessors](#)

[Statewide List of Certified Assessors \(XLS\) \(Updated October 2018\)](#)

Main Menu

COURSES AND CLASSES

- [Find a Course](#)
- [Upcoming Classes / Class Registration](#)
- [Online Courses \(in-progress\)](#)

MY INFORMATION

- [My Contact Info](#)
- [My Transcript](#)
- [My Personal Training Plan](#)
- [My Scheduled Training](#)

GET HELP

- [Supported Browsers](#)
- [Email the DSD Learning Team](#)
- [Trainlink Information](#)
- [Request a Unique Key \(UserID\)](#)

Using Self Reporting in TrainLink

When?

Your Recertification course is full and you have other training you would like to enter into TrainLink

- Sign into TrainLink
- Click on My Transcript in the menu

Choose Add Self Reported Training



A screenshot of a user profile dropdown menu. The menu is dark blue with white text. At the top, it says "TERESA VANDERBENT" with a downward arrow. Below this, there are two options: "Add Self Reported Training" and "My Scheduled Training". The "Add Self Reported Training" option is highlighted with a red rectangular box. To the right of the menu, there is a vertical grey bar and a "Help" link.

[Help](#)

TERESA VANDERBENT ▾

[Add Self Reported Training](#) | [My Scheduled Training](#)

Complete the self-reporting fields

Add Self Reported Training

Learning Activity: *

Topics:

Delivery Method: * *Independent Study* ▼

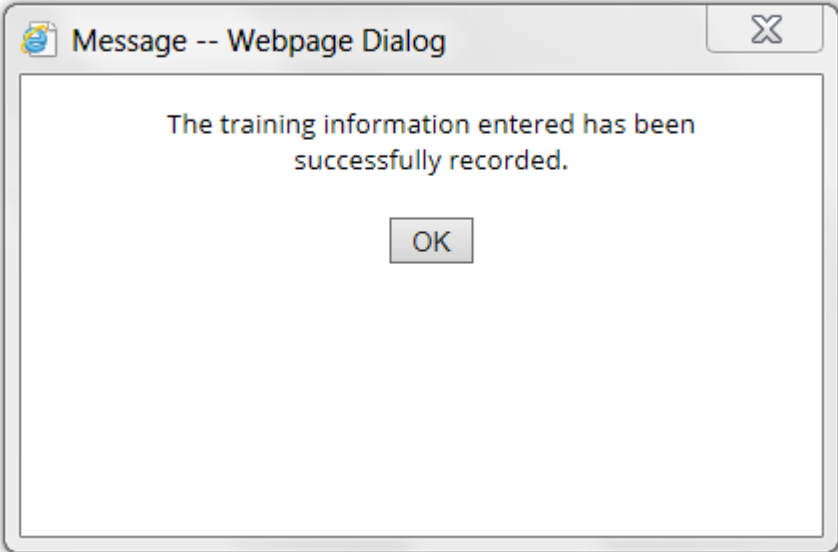
Location: 🔍

Student Contact Hours:

Instructor: 🔍

Start Date: * 📅

Registration Status: * ▼



Self-reporting in My Transcript



Choose Show Self Reporting to view only the Self reported courses

Home Hel

MY TRANSCRIPT TERESA VANDERBENT ▾

Select a class for more information or to change a registration. [Add Self Reported Training](#) | [My Scheduled Training](#)

Show Self Reported Training Only

	<u>Status</u>	<u>Course Code</u>	<u>Name</u>	<u>Start Date</u> ▾	<u>Student Contact Hours</u>	<u>Delivery Method</u>
SELECT 	Finished	SELF	EQUITY/DIVERSITY	03/22/2019	1.00	Independent Study
SELECT 	Finished	SELF	A GOOD TIME FOR THE TRUTH: RACE IN MINNESOTA	12/05/2018	1.00	Audio Conference

Certified assessor auditing process next steps

Purpose of auditing process: To ensure lead agencies are following the recertification process and that lapsed assessor are not completing MnCHOICES Assessments

- **Lead Agency Review questionnaire:** Lead agency will verify the agency follows the recertification processes
- **MnCHOICES will pull a last completed assessment report** and compare it to the lapsed assessor report



Lead Agency Questionnaire

**Lead Agency Review updated their
lead agency questionnaire**

**“Question: Yes or No - Do your
lead agency supervisors verify all
MnCHOICES assessors are
recertified prior to the assessor’s
three-year certificate lapsing?”**



Statewide certified assessor list includes

- **Verified list:** Highlights and notes assessors whose certificates *expire soon*
- **Mentor/Supervisor:** Quarterly review of the list to ensure certificates do not lapse
- Send corrections to the MnCHOICES Help Desk

Verified List of Certified Assessors Monthly				Quarter ending 3/31/2019				
Lowe, Stacy L	Hennepin	3/2/2016	4/1/2019	4/1/2019	5/1/2022			Up-to-date
Nicholson, Joyce E	Dakota	3/2/2016	4/1/2019	5/31/2018	6/1/2021	blank	blank	Up-to-date
Vandenheuvel, Heather	Washington	3/3/2016	4/1/2019					Expires soon
Drouin, Rachelle D	Wright	3/4/2016	4/1/2019	4/1/2019	5/1/2022	blank	blank	Up-to-date
Butzow, Bethany L	Hennepin	3/7/2016	4/1/2019	4/1/2019	5/1/2022			Up-to-date
Graff, Judy L	Pennington	3/7/2016	4/1/2019	blank	blank	blank	blank	Expires soon
Jones, Alissa M	Pennington	3/8/2016	4/1/2019					Expires soon
Kienlen, Erin E	Blue Earth	3/10/2016	4/1/2019	4/1/2019	5/1/2022	blank	blank	Up-to-date
Nyland, Jerri L	Beltrami	3/10/2016	4/1/2019					Expires soon
Bartos, Jennifer J	White Earth Nation	3/15/2016	4/1/2019	4/1/2019	5/1/2022	blank	blank	Up-to-date
Tawah, Rosane M	Ramsey	3/16/2016	4/1/2019	4/1/2019	5/1/2022			Up-to-date
Detloff, Amy C	Martin	3/17/2016	4/1/2019	4/1/2019	5/1/2022	blank	blank	Up-to-date
Spier, Gretchen D	Hennepin	3/18/2016	4/1/2019					Expires soon
Klingseisen, Kristina M	Polk	3/22/2016	4/1/2019	blank	blank	blank	blank	Expires soon
Tolifson, Katie L	Horizon PH	3/24/2016	4/1/2019					Expires soon
Billstein, Mary L	Isanti	3/29/2016	4/1/2019	blank	blank	blank	blank	Expires soon
Liapis, Katy E	Beltrami	3/29/2016	4/1/2019	4/1/2019	5/1/2022			Up-to-date
Uran, Rebecca J	Hennepin	3/29/2016	4/1/2019	4/1/2019	5/1/2022	blank	blank	Up-to-date
Vang, Mai N	Hennepin	3/29/2016	4/1/2019					Expires soon
Breffle, Heather A	Anoka	4/1/2016	5/1/2019	blank	blank	blank	blank	Expires soon
Ewald, Jenelle M	Anoka	4/1/2016	5/1/2019					Expires soon
Ozyigit, Christine M	Anoka	4/1/2016	5/1/2019	5/1/2019	6/1/2022	blank	blank	Up-to-date
Vaillancourt, Dawn M	Dakota	4/1/2016	5/1/2019	5/1/2019	6/1/2022			Up-to-date
Yager, Marianne M	Wadena	4/1/2016	5/1/2019	blank	blank	blank	blank	Expires soon
Bauer, Lynn	Dakota	4/4/2016	5/1/2019	5/1/2019	6/1/2022			Up-to-date
Felland, Rebecca A	Kanabec	4/5/2016	5/1/2019	blank	blank	blank	blank	Expires soon

Lapsed assessor tab

- A list of assessors that are lapsed in alphabetical
- If the record is incorrect submit the person's certificate into the MnCHOICES Help Desk
- Assessors more than 30-days lapsed must not complete MnCHOICES Assessments

Lapsed Assessors		Quarter ending 3/31/2019	
Revised through 4/9/2019 DMH			
Name	Agency Certified In	Certified	Expir
Aamold, Sandy	Todd	7/16/2014	8/1/2017
Adamek, Justin J	Stearns	10/2/2014	11/1/2017
Adamski, Danielle M	Lac Qui Parle	10/23/2015	11/1/2018
Adderley-Frame, Susan E	Hennepin	6/17/2015	7/1/2018
Almeroth, Kimberly A	Anoka	10/13/2014	11/1/2017
Amo, Jessica J	Lake	8/7/2014	9/1/2017
Anderson, Ashley O	St. Louis	9/23/2014	10/1/2017
Anderson, Janet M	Hennepin	10/23/2014	11/1/2017
Anderson, Jean M	Koochiching	1/15/2016	2/1/2019
Anderson, Rob	Hennepin	8/14/2015	9/1/2018
Anderson, Shelly K	Pine	6/19/2014	7/1/2017
Apling, Suzette A	Rice	9/4/2014	10/1/2017
Appelhof, Lisa	Freeborn	8/26/2014	9/1/2017
Armstrong, Mary T	Itasca	8/25/2014	9/1/2017

Lead Agency Questionnaire: second question

“Question: Does that review include the following policies outlined in [MnCAT Step 4: Recertification Instructions and Guidance](#)?”

- All 45 continued learning units (CLUs) are within the current certificates start and end date - Yes or No
- The 12-CLUs met the person-centered training requirements outlined - Yes or No
- A lapsed certified assessor (more than 31-days from the end date of the current certificate) is not allowed to complete an assessment or CSP? - Yes or No”

Quarterly comparing last completed assessment to lapsed assessor list

1. Pulling a list of last completed assessments by assessor from MnA 1.0
2. Comparing the data against the lapsed assessor list
3. Reviewing TrainLink records
4. MnCHOICES will send an email to the lead agency

MnCHOICES Email to the lead agency

List of lapsed assessors who appear to have completed an assessment

Request for more information, examples

- Mentor closed the assessment for a assessor who no longer works for the agency
- The person is not lapsed, and include records
- Person was lapsed and here's the steps we took to correct it.

Would a webinar be helpful? MMA Evaluation question

Purpose: To review the certification and recertification process

- Education requirements
- Documenting, recording and retaining certification and recertification
- Monitoring certifications & lapsed certifications

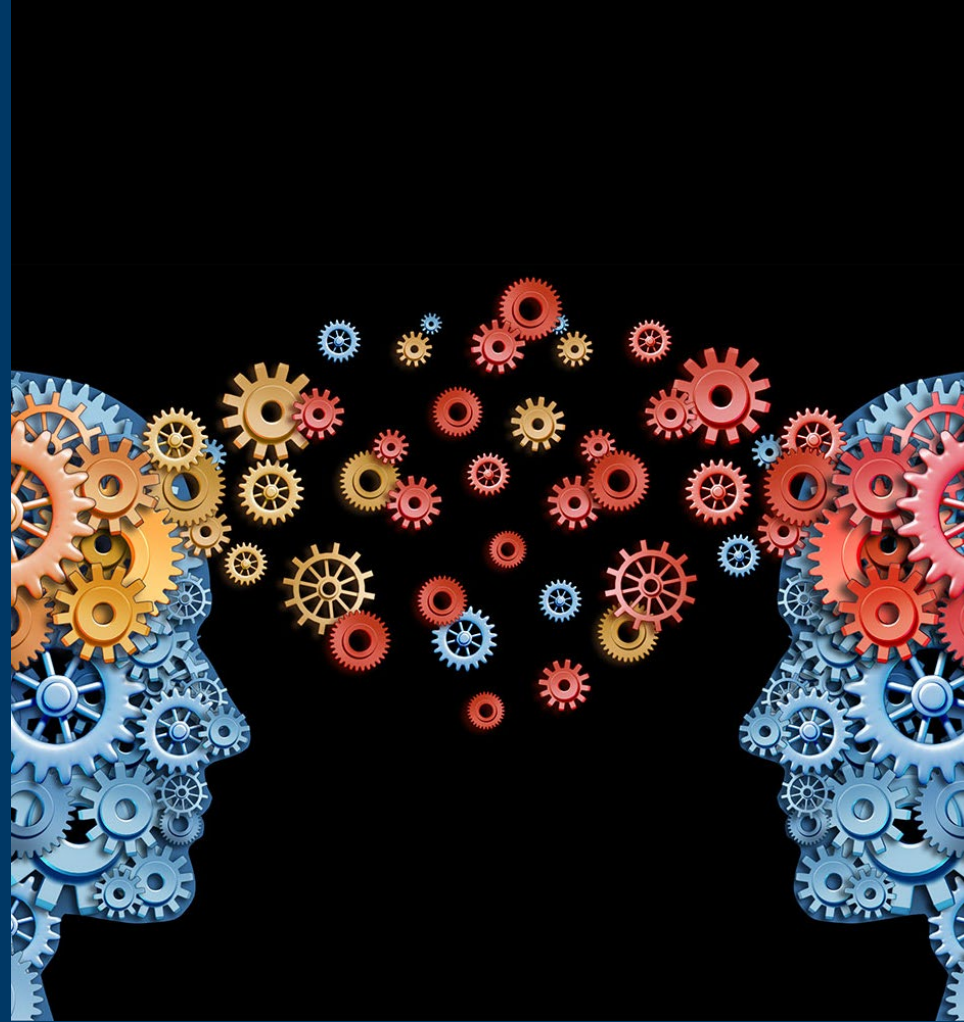
Who may attend: Supervisors, mentors and assessors

- Signing certificates
- Retaining certificates
- Entering CLU's in recertification
- Assessor and supervisor share the responsibility to ensure the certificate does not lapse



Questions

MnCHOICES Assessment 2.0



MnCAT Step 1 and Step 2 revisions posting

Is the MnCAT Step 1 and Step 2 revisions posting affected by the MnA 2.0 change in timeline?

- They are not affected by the MnA 2.0 timeline change
- The posting time may be affected by completion of eLearning contract
- Scheduled for Summer of 2019
- Step 3 will not be released until 90-days prior to MnA 2.0 release, as noted in the April 2019 launch webinar

Additional MnCAT questions

Is the revised MnCAT training for assessors that are already certified, new staff or both?

The revised MnCAT Step 1 and 2 will be used for new assessors as part of certified assessor training

Can current certified assessors skip the revised Step 1 and 2 MnCAT trainings?

Current certified assessors are not required to take the revised MnCAT Step 1 and 2, but

Because MnCAT Step 1 and Step 2 contain new content:

Certified assessors may use the content for recertification CLUs

Other MnCAT questions

Do you recommend managed care organization (MCO) assessors take the MnCAT training now or wait until the MCOs launch?

This fall we will provide an MCO webinar to MCO management on mentor roles, collect MCO mentor lists and complete a MCO new mentor training

Why MCO mentor training in the fall?

- **MnSP mentors:** To prepare MCO's for the launch of the residential services tool in the MnSP
- **MnA mentor:**
 - Time to collect assessor education and experience records
 - After the fall new mentor training assessors may complete MnCAT Step 1 and 2



MnA 1.0 possible changes

The MnCHOICES team submitted a list of changes to the MnA 1.0 MN-IT team to determine

- amount of time
- resources
- impact on the computer application
- Changes we might make due to legislative updates
- Changes we might make in policy to create efficiency

MnA 1.0: Changes to the DD screening documents

Purpose: To match recent MMIS updates, some of which may result in efficiencies.

Change's description: The DD screening documents within MnCHOICES Assessment will be updated to reflect changes that are in progress.

Specific changes will be announced at a webinar planned for June 19, 12:30 to 2 p.m. Please attend and see how these changes will improve your workflow for both assessments and support planning.

Add spell check in the narrative boxes in MnA 1.0

Will occur in MnA 1.0? No

Time: Extensive work to change the text box fields

Resources: Would have to divert staff from MnA 2.0

Stability: Concern about its potential or possible impact on the stability of MnA 1.0

Work around:

- Even if CSP is closed, the assessment can be re-opened to fix spelling issues.
- The changes will be updated the next time the person returns to work in the CSP and CSSP.

Copying data from MnA 1.0 to MnA 2.0

Unlikely, why?

If the request is for copying content from MnA 1.0 domain narrative boxes to MnA 2.0 narrative boxes

- Format is likely to be different enough that the data will not easily map into specific sections
- Copying/pasting from MnA 1.0 gives the assessor the freedom to take only the information they need while they consult the MnA 1.0 document
- Any solution would still require copying/pasting
- Copying from MnA 1.0 eliminates deleting copied information not needed while working in MnA 2.0

MnA 2.0 survey 5 results

Question 1: Do you need to see when and who created a record in MnCHOICES Assessment 2.0?

- The majority responded yes.

Question 2: If your response is yes, on which of these created records do you need to see the date stamp and the person who created it?

- The majority responded initial assessment/reassessment.
- Other comments summary – it is helpful to see who created the record:

For follow-up questions • To track timelines • For the county of residence process • To research previous assessments and services

Question 3: Do you need to see when the status of these records changes?

- The majority responded no.

Question 4: If applicable to the particular record, which of these statuses do you want to see?

- The majority responded open.

Question 5: Do you need to see when referrals, assessments have been assigned?

- The majority responded no.

MnA 2.0 survey 5 results cont.

Question 6: If your response is yes to questions 1, 3 or 5, what do you use this information for?

Comments summary: To check the assignment date • For follow-up • To track timelines, deadlines and turnaround times • To show history and avoid duplication • For cross-agency collaboration

DD and LTC screening document

Question 7: When entering information needed to complete a screening document in the MnCHOICES Assessment 1.0 (MnA 1.0) application, what is your preferred view?

- The majority responded a view similar to the actual screening document (DHS-3087 and DHS-3427)

Question 8: How does your agency typically enter information into MMIS after completing a MnCHOICES Assessment?

- The majority responded by using a printed copy of the screening document to enter information into MMIS.

Screening documents comment summary:

Organize the screening documents to match MMIS so it is easier to enter • We use split screens with the electronic screening document and MMIS to enter data • We print the screening documents and enter into MMIS. But, printing the screening documents is not ideal because there is a lot of white space and it takes a lot of paper. • We e-file so the screening document is e-filed and the case aide is made aware that it needs to be entered into MMIS

Process used to determine the delay

The MnCHOICES project team consisting of the Disability Services and Aging staff and Minnesota IT Services (MN-IT)

Took in-depth review of project details: February through March 2019

- **Result of the review:** Determined a delay was needed to ensure a high-quality product and a smooth rollout
- **DHS and MN-IT** determined the need to delay the implementation of MnA 2.0 and negotiate the next steps

Notification of the delay via email was sent to lead agencies: April 5, 2019

Memo detailing delay: May 13, 2019

MnA 2.0 launch plan

- 1. Adding staff and resources:** DHS and MN-IT worked together to identify a plan to complete the project by adding staff and resources
- 2. MN-IT will issue a request for proposal (RFP)**
- 3. Design and build of MnA 2.0 will continue as DHS revises the launch plan**

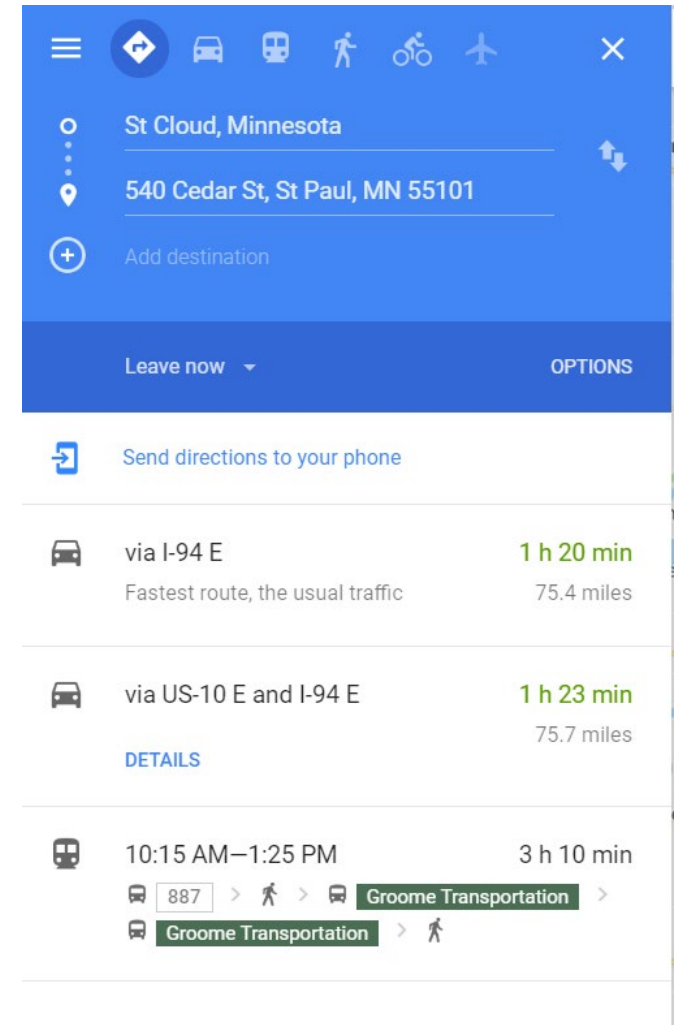


RFP: Choosing our direction

RFP decision by early 2020 will choose one of the following options

1. Continue partnering with MN-IT until the project is complete
2. Off-the-shelf product
3. A combination of the two previous options

RFP includes all MnA 2.0 and MnSP phases, features and functionality.

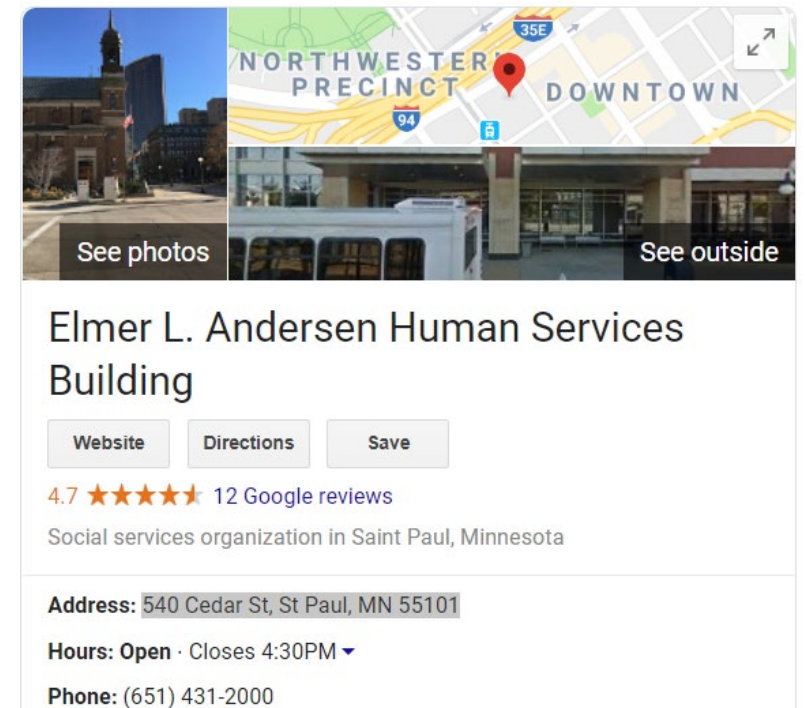


MnA 2.0 Request for Proposals (RFP)

RFP purpose: To determine if there is a vendor that can provide products and services to complete the project.

RFP Process

1. Collecting requirements (Apr. – Jul.)
2. Drafting RFP (Jul. – Aug.)
3. MNIT, Admin, CMS Review of RFP (Sept. - Nov.)
4. Posting RFP (publish in Dec.)
5. Vendor response time (Dec. – Jan.)
6. Evaluating responses/scoring RFP (Feb./Mar.)



Example list of potential RFP vendors

- Direct Care Innovations
- FEI Systems
- Foothold Technology
- Health Risk Screening
- Innovation Associate
- MediSked LLC
- Pulselight
- Qlarant
- Relias
- RSM US LLP
- Therapy Services, LLC

Break: 10:30 to 10:40 a.m.



MnCHOICES help desk update



At the MnCHOICES help desk

Hello! Help Desk Gurus are Kong & Dwayne

Contact protocol

- [Help Desk Contact Form](#), preferred
- Mentors only
- Include short description in the first sentence of the description box.
- Examples: PMI Update request, Attn: Kong, Unable to log into MnSP affects multiple users



MnCHOICES HelpDesk response time

Expect 24 to 48 hours for most requests

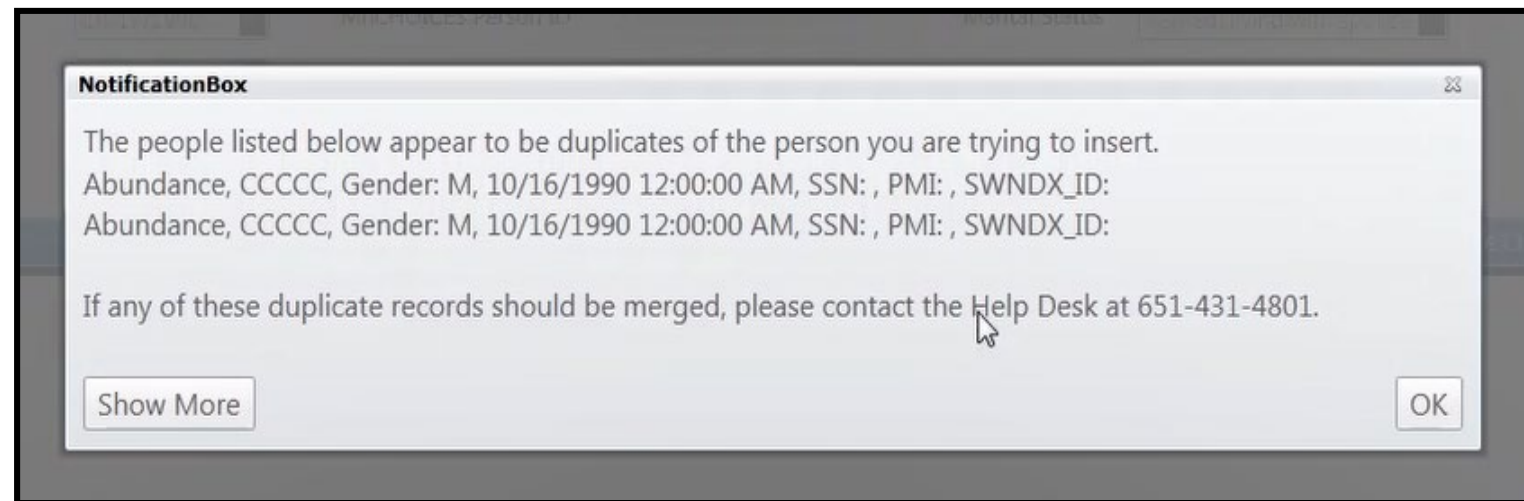
- Follow-up information goes to dhs.mnhelp@state.mn.us
- Include your original email or request form to act as a reference

We are able to better assist you when

- Provide details and describe your request
- Collect the precise steps you took that got you to your problem
- Screenshots are awesome!

MnA 1.0: Person Search – duplicate found

- Attn: intake workers
- When inserting/adding a person to MnCHOICES Assessment
- After doing a person search, you check for duplicates and one is found:

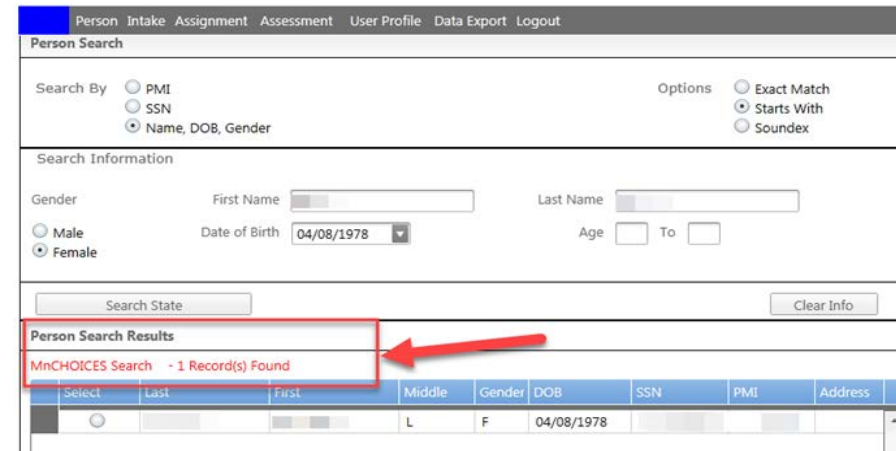


MnA 1.0: existing person

User is presented with a message including the information of the existing person and to contact the help desk.

Before contacting the help desk

- Search for that person by name
- When found, make sure to verify it is a “MnCHOICES search.” This lets you know the person is in MnCHOICES
- Work with that profile
- If the profile needs a PMI or PMI update, send a request to the help desk



The screenshot shows the 'Person Search' interface. The search criteria are: Search By: Name, DOB, Gender; Options: Starts With; Search Information: Gender: Female, Date of Birth: 04/08/1978. The search results show one record found, which is a MnCHOICES search. A red box highlights the search results, and a red arrow points to the text 'MnCHOICES Search - 1 Record(s) Found'.

Select	Last	First	Middle	Gender	DOB	SSN	PMI	Address
<input type="radio"/>			L	F	04/08/1978			

MnA 1.0: duplicate found

If a duplicate is found do not insert a person until you've verified that the existing MnCHOICES person isn't the same person.



MnA 1.0: PMI updates

If searching by PMI does not produce a result

- Try searching by name
- The person may already be in MnCHOICES, but associated with a different PMI

If you need a PMI updated to an existing record in MnCHOICES

- Send a request to the help desk
- Proceed with using the existing MnCHOICES profile



MnA 1.0: incomplete copy

When creating a document and data did not fully copy from the previous assessment

- No data transferred
- Partial transfer
- Question count increases when question group is selected
- Go to ADLs to confirm data is copied over

Options to fix your document

- A. Create a new one – Send the help desk a request to delete the document. The worker creates a new one.
- B. Data copy request – For reasons where the document should not be deleted, send a help desk request to have the data copied over. This takes more time than option A.

MnA 1.0: LTC/DD answers missing in printout

If answers are missing on the screening document printouts after running eligibility on an assessment, send these to the MnCHOICES help desk to repair.



MnSP: Why did a plan auto-close?

1. Auto-closed plan such as a RATE, CSP or CSSP –Why did the plan auto close?

- Automated system closes documents in open or complete status 12-months and older
- Auto-close uses the end date of the date span located in the About Plan page
- The end date can not be set to a date in the past or preceding today's date

MnSP: reopening an auto-closed document

2. You may request a plan be reopened by

- Using the MnCHOICES help desk form
- Provide your reason on why the plan(s) need to be reopened

MnSP: when reopening a CSP

Courtesy request

- When requesting to reopen a CSP, remember, all the data in the CSSP will be deleted.
- Make sure you confirm with the worker it is okay to reopen the CSP and delete the CSSP before sending the request to the help desk.
- **Another option:** Can you make the change in the assessment? Assessment changes will copy over to the CSP and CSSP.



After opening an auto-closed plan

- Change the end date of the date span to the day the help desk reopened it
- The auto-close run occurs every night
- If the plan owner did not change the date in time, submit another ticket if the plan closed and you still need it open



MnSP: How do I locate the node letter

When reporting slowness or other issues, be sure to include the letter of the node in the help desk form.

You will find the letter at the bottom of the page after the application version.

Secondary Owner:	<input type="text"/>	<input type="text"/>
Plan Aide:	<input type="text"/>	<input type="text"/>
	Agency	Team Name
Team 1:	<input type="text"/>	<input type="text"/>
Team 2:	<input type="text"/>	<input type="text"/>
Server Name is: 7/19/2018 11:00:41 AM - Application Version :18.3.0.0 b		

MnA 1.0 & MnSP Known Issues documents

A good fraction of requests to the help desk are known issues

1. Consult the known issues document

- Before reporting an issue, check to see if the issue is noted along with any troubleshooting tips.
- Have them handy: Add a link or a shortcut to them.
- Documents are easy to use: Issues are put into categories according to its location within the application.

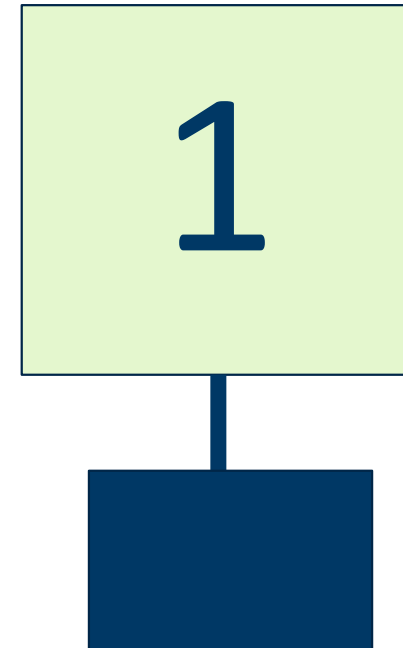
2. Compare reported issues from users against the known issues before sending in a help desk form.

Questions for the help desk



MMA Charter feedback instructions

- **Tables count off:** 1 through 4 and repeat.
- **Name Tag:** Add your number to your name tag.
- **When you return:** Sit at a table with your corresponding number
- If you reviewed the feedback session questions ahead of time bring your responses with you to the table discussion



Lunch Time: Noon to 1 p.m.



MnCHOICES Mentor Alliance review

Process introduction: 10 minutes

Table discussion: 40 minutes

Table reporting to MMA members: 40 minutes



Purpose

Meeting frequency, location, type
(in-person/other)

Roles

Expected outcomes

Break: 2:30 to 2:40 p.m.



MnCHOICES Support Plan



MnCHOICES Support Plan - Login

My Agency:

User Name:

Password:

Login

Warning!

1. Rates Releases

- June 14, 2019
- December 2019

2. Residential Services Tool: Began collecting requirements 2nd quarter 2019

3. Server Updates

Reminder: outage schedule

MnCHOICES CountyLink

Mentors page

Outages heading

[Release and Outage Schedule](#)

MnSP outage: disability rates changes

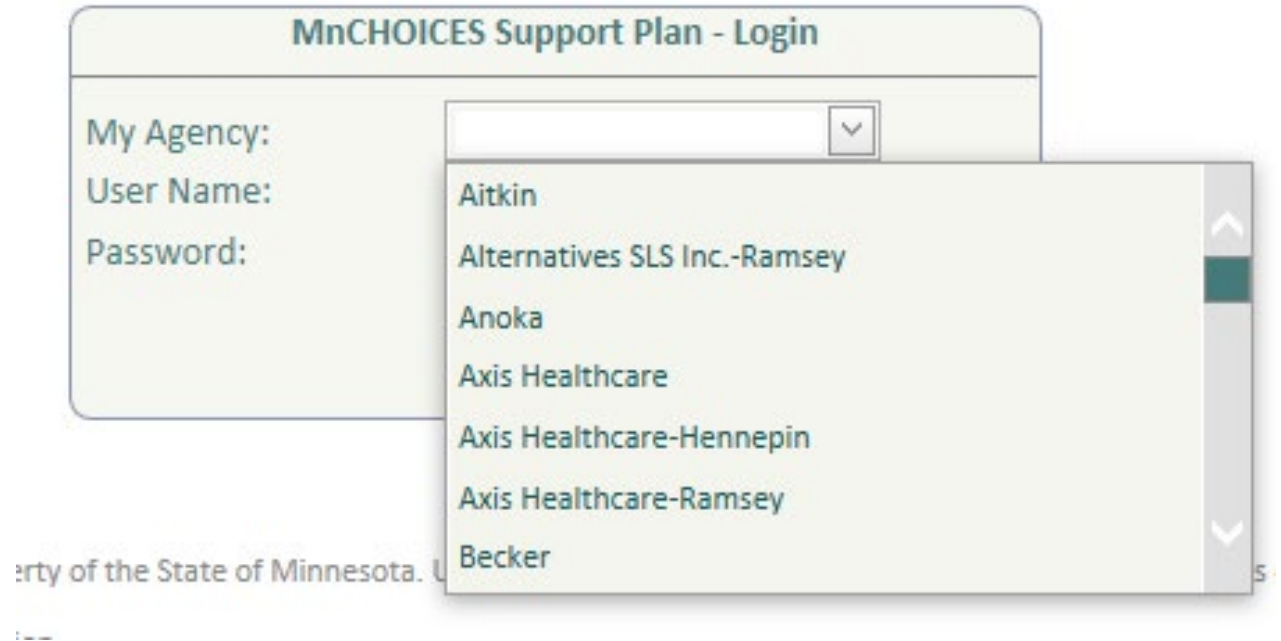
MnSP rates outage details:

- Affects: MTZ-SP and MnSP-PROD
- MTZ-SP outage: Thursday, June 13, 4 to 6 p.m.
- MnSP-PROD outage: Friday, June 14, 4:30 to 7 p.m.



My lead agency no longer contracts with a company.

How do I remove the agency from the drop down in the Support Plan?



Combination is removed from the drop down when

Action to Take for Agency Maintenance

- Action to Take for Agency Maintenance:**
- Extend an Agency/Agency End Date
 - Shorten an Agency/Agency End Date
 - Create an Agency/Agency Combination

Lead Agency (On behalf of):

My Agency (Delegate):

Start Date:

End Date:

How will this access be used?:

We no longer contract with Banana. Please change their end date.

Include in the SSAM instructions that your agency no longer has a contract with the “My Agency” and you would like to shorten the Agency End Date.

Password resets: Remedy on Demand

Unsuspend/Password Reset

Requested For: Corey D Solberg Phone: 1 651 4312273 Email: Corey.Solberg@state.mn.us

Instructions

NOTE: To submit a request for another person, you must complete the **User Information** section.

Do not change the Requested By and Requested For fields above, your name should be in the Requested By field.

Required fields are marked with a red asterisk (*)

Request Type*

Unsuspend with no password change New Password

(Only County/Tribal **Security Liaisons**, State Security Liaisons and State Managers Supervisors can request a new password. If you require a password reset, please contact your [Security Liaison](#)).

User Information

Complete the following fields for the user you wish to have the password unsuspend

Login ID*

Name*

Phone

Email

Agency

Which System(s)?

Please place a check mark by the system(s) you are requesting an unsuspend/password reset. Leaving the area blank will delay resolution as we will need to reach out to you to get more information.

- ACF2/Mainframe (InfoPac/eReports, MAXIS, MEC2, MMIS, PRISM)
- e-Oscar
- e-Services for Driver Information
- EBT
- METS
- MnCHOICES Support Plan (MnSP)
- Remedy OnDemand (RoD)
- RSA Key Fob (PIN/WMS)
- SIR
- SMI/ISDS-SMRT/BOBI

Comments

This form is for account unsuspends and password resets only. Other types of requests will not be answered.

Summary Save As Draft Submit

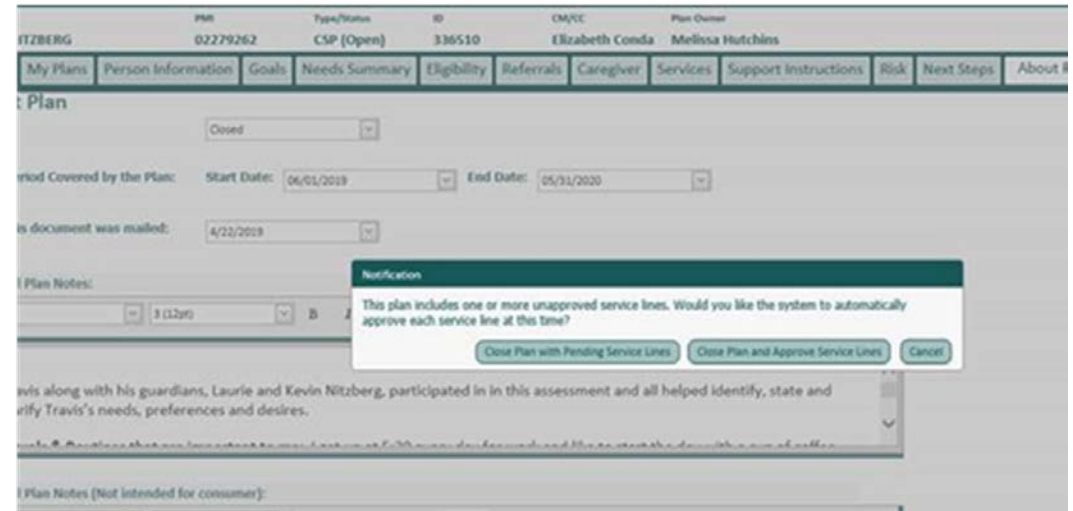
What should assessors do about this message?

CHOOSE: Close Plan with Pending Service Lines

The screenshot displays a software interface for managing a plan. At the top, a header bar contains the following information: NAME: NITZBERG, ID: 02279262, Type/Status: CSP (Open), ID: 336510, CM/CC: Elizabeth Conda, and Plan Owner: Melissa Hutchins. Below this is a navigation menu with tabs: My Plans, Person Information, Goals, Needs Summary, Eligibility, Referrals, Caregiver, Services, Support Instructions, Risk, Next Steps, and About Plan. The main content area shows the plan's status as 'Closed' in a dropdown menu. Below this, the 'Period Covered by the Plan' is shown with a Start Date of 06/01/2019 and an End Date of 05/31/2020. A date field indicates when the document was mailed: 4/22/2019. A notification dialog box is overlaid on the screen, titled 'Notification', with the text: 'This plan includes one or more unapproved service lines. Would you like the system to automatically approve each service line at this time?'. The dialog box has three buttons: 'Close Plan with Pending Service Lines', 'Close Plan and Approve Service Lines', and 'Cancel'. Below the notification, there is a text area containing a note: 'Travis along with his guardians, Laurie and Kevin Nitzberg, participated in in this assessment and all helped identify, state and verify Travis's needs, preferences and desires.'

Service line notification when closing the CSP

- Data from previous CSSP copies into CSP
- Assessor tries to close CSP and gets this message
- Do not need to delete the services in the CSP when they get this message
- Have your assessors select “Close Plan with Pending services” to retain the copied services for the case manager’s work



Report on mentor feedback on MnSP efficiencies

Mentors at MMA

- Reviewed a list of submitted Support Plan efficiencies
- Provided a mentor's perspective on priorities: Critical, High, Medium, Low

Here's what we heard

- **Critical:** Defect has highest priority, and must be fixed before all other defects go into Production. The defect will have a major impact on users if not fixed before other defects.
- **High:** Defect has a major impact on users and no work-around exists. The defect needs to be fixed in the release, if an active project.
- **Medium:** Defect has a moderate impact on the user, such as a screen rendering incorrectly, long wait times, or non-critical data not appearing or is inaccurate. The defect may be fixed in the release if an active project, or in the future.
- **Low:** The defect may or may not be fixed at all.

Lead agencies are able to
open their own CSP:

Critical-high

What we learned:

The system is not designed
for lead agencies to open
plans which means we are
unable to change this.

1. Have PMI and date of birth print on the first page:
Critical-high
2. Print cell phone number:
High-medium

Definitions

- **Critical:** Defect has highest priority, and must be fixed before all other defects go into Production.
- **High:** Defect has a major impact on users and no work-around exists.
- **Medium:** Defect has a moderate impact on the user, such as a screen rendering incorrectly, long wait times, or non-critical data not appearing or is inaccurate.

Goals and Emergency Back-up Plan

Goals tab

- Allow goals statements and dates to be editable rather than having to delete & re-enter them: High

Emergency Back-up Plan

- Copy the contacts within the emergency back up plans: High

This is an enhancement request.

It is being considered and weighed against other requests.

Services lines: Enhancement

Services lines

1. Ability to choose what services copy on the CSSP: High
2. For COLA, the ability to copy or duplicate services lines to only those being changed: High-medium
3. Ability to duplicate service lines: High-medium
4. Allow the description of the service in the HCPC to be displayed: High-medium

Search screen: High to medium

DEPARTMENT OF HUMAN SERVICES

My Agency: ZBeta Test Aitkin Lead Agency:

Search My Plans Password Change Log Out

First Name: straw Last Name: short
Date of Birth: [dropdown] SSN: [input] PMI: [input]

Advanced Search
 Exact Match
 Starts With
Clear Search

Find Assessment # [input] GO! Open Plan # [input] GO!

Last	First	Middle	Gender	DOB	SSN	PMI
Shortcake	Strawberry		F	9/7/1972		
Shortcake	Strawberry		M	4/17/1983		
Shortcake	Strawberry		M	5/9/1973		
Shortcake	Strawberry		F	12/12/1973		

ID	Type	Create / Assessment Date	Status	Plan Owner	Delegate Agency	Lead Agency	Closed Date	Modified By
7806	Rate Plan	10/10/2018	Open	User18 FMCHS	FMCHS	FMCHS		
2950	CSSP	06/21/2017	Closed	UAT 1 User	ZBeta Test Aitkin	ZBeta Test Blue Plus	06/21/2017	
2526	CSSP	05/30/2017	Closed	User10 Kanabec	Kanabec	Kanabec	06/21/2017	
2332	CSP	05/11/2017	Closed	Teresa vanderBent	ZBeta Test Aitkin	ZBeta Test Aitkin	05/11/2017	
2334	CSSP	05/11/2017	Closed	Teresa vanderBent	ZBeta Test Aitkin	ZBeta Test Aitkin	05/30/2017	
22572	Intake	12/12/2016	Closed	User 2 Wadena County 1	---	---	12/12/2016	Hauge, Denise
22573	New Assessment	12/12/2016	Closed	User 2 Wadena County 1	---	---	12/13/2016	Hauge, Denise

1. Add a column that shows the effective date on each plan that has been created for a person
2. When returning to the search page the user can see the previously created searches
3. System removes spaces before and after pasted information

Definitions:

High: Defect has a major impact on users and no work-around exists.

Medium: Defect has a moderate impact on the user.

Name PMI
Robert Adams 92873683

Search My Plans Person Information Goals Needs S

Suffix P

County of Financial Responsibility (CFR) H

+ Age

+ Gender

+ Marital Status

+ Race

+ Address

+ Email

- Phone

Home	<input type="text" value="(999)999-9999"/>
Work	<input type="text" value="() -"/>
Cell	<input type="text" value="() -"/>
Other	<input type="text" value="() -"/>

Person Information: High to medium

1. Remove the requirement that once something is entered it can't be blank.
2. Change phone formatting to match the assessment.

Definitions:

High: Defect has a major impact on users and no work-around exists.

Medium: Defect has a moderate impact on the user.

What happens with your feedback?

MnCHOICES and case management policy

Meet to discuss and prioritize these efficiencies and submit a list to the MnSP MN-IT team

MnSP MN-IT team will provide the

- Amount of development time for each
- Staff resources required
- Time required to make the change

What affects decisions?

Defects and enhancements will be limited due to MnA 2.0 work

Competing interests like building the Residential Services Tool

When will you know the results of those decisions? Next MMA

Would it help to post the enhancement requests on MnCHOICES CountyLink?

MnCHOICES Support Plan Known Issues

> DHS Systems and IT Updates > MnCHOICES

MnCHOICES Support Plan v18.6.1 release known issues

3/26/2019

- [Search tab](#)
- [My Plans tab: None to report](#)
- [Person Information tab](#)
- [Services tab](#)
- [Service Agreement screen](#)
- [Service Line screen](#)
- [Service Agreement report](#)
- [Rate Input report](#)
- [Rate Inputs](#)
- [Goals tab](#)
- [Needs Summary tab](#)
- [Eligibility tab: None to report](#)
- [Next Steps tab](#)
- [About Plan tab](#)
- [Printing](#)
- [Caregiver](#)
- [Risks](#)
- [Support instructions: None to report](#)
- [Evaluations](#)
- [General \(applies to more than one tab\)](#)

- MnCHOICES CountyLink
- Help Desk page
- Troubleshooting documents
- MnCHOICES Support Plan

MnSP: new Known issues (KI)

About Plan tab (2/20/2019)

Issue: Primary owner and phone number do not transfer when opening a new CSSP.

User expects: Data from the assignment section to copy over from the previous document.

Description of KI: A user creates a new CSSP from a previous CSP or CSSP and MnSP automatically assigns the user that opens the new CSSP as the primary owner. Primary Owner name and phone number from the previous CSP/CSSP does not transfer to the assignment section in the new CSSP. All other assignment section data will copy from the previous document.

Workaround: The user can re-enter the phone number and plan owner if needed.

Issue: A user does not enter goals for a person so no goals should print.

However, in the CSP, CSSP or Provider CSSP (preview and print version) the message “xrRichTextGoalStatement” displays in the goals statement. This is not an error message. It is a display issue in the Goal Statement.

Short and Long-Term Goals

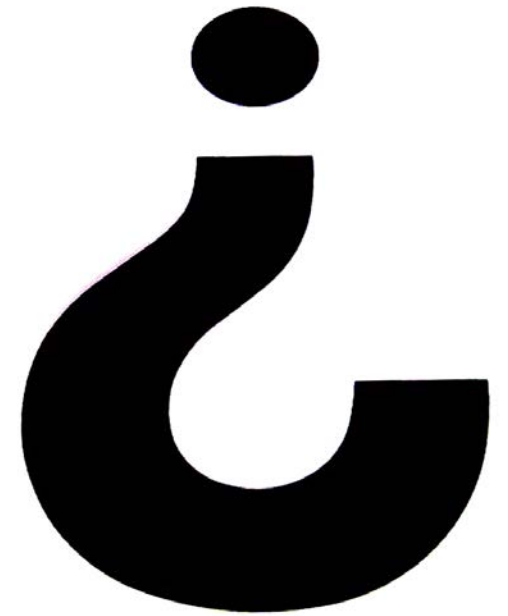
Goal Statement	Target Date	Provider & NPI (if applicable)	Frequency of Reporting
xrRichTextGoalStatement			

Workaround: If this message displays, go back to the Goal Statement and enter “not applicable”. This will prevent the “xrRichTextGoalStatement” from displaying on the print out.

Characters used in MnA notes displaying incorrectly in MnSP (2/1/2019)

Issue: If the user entered a hyphen in the assessment notes or if single (") or double (""") quotes are copied and pasted from Microsoft Word into any text box, it displays as an upside down question mark in the support plan.

Workaround: Users should not use hyphens in assessment notes or copy/paste quotes into MnSP text boxes. The quotes display correctly if the user types them into MnSP instead of using copy/paste.



Changing a password: special character error (1/11/2019)

Issue: When a user changes MnSP password and uses a caret (^) in the new password

- The application does not record the password change
- No error message displays to indicate the change was not made

Workaround: Do not use the caret (^) symbol in a new password.

Acceptable special characters include: dollar sign (\$), percentage (%), underscore (_), dash (-), asterisk (@), exclamation point (!) or question mark (?).



No More Carrots!

Plan locks when user changes data on a page and then creates a CSSP (1/30/2019)

Issue: A user changes data on a page and then clicks to create a new CSSP without waiting for the changes to save.

MnSP registers the save and create and becomes confused about performing both actions at the same time and can freeze.

Workaround:

Users should change work flow and perform one task at a time:

- First, save any changes in data in the CSP or CSSP.
- Then click to create a new CSSP when MnSP has saved the changes on the page.

Enter key twice produces print preview page (3/27/2019)

Print preview page displays when the user changes any dropdown field or has the cursor in a text field in any type of plan (CSP, CSSP, LTSS Evaluation or Rate) and then hits the enter key twice.

Result: A notification message displays with the choices of Save, Don't Save or Cancel. If the user chooses the Save or Don't Save buttons the print preview of the plan displays. Occurs in any open or closed plan with an active drop down.

Workaround: If you choose Save or Don't Save and the plan displays, the user can close the preview. If the user clicks cancel on the notification message it will go back to the previous screen with **no data loss**.



MnSP Questions

**If you registered to attend
this meeting via TrainLink**

**you will receive an email
this afternoon to evaluate
today's MnCHOICES Mentor
Alliance Meeting**

**Evaluations remain open
through June 11, 2019**





MnCHOICES Mentor Alliance Meeting

June 4, 2019