Purpose: To provide a screen-by-screen and step-by-step instruction for Certified Assessors that supports the correct process for taking Assessments offline to conduct a face-to-face assessment interview, save data entered and correctly upload data into MnCHOICES after reconnecting to the internet in the Certified Assessors office. This walkthrough uses screen shots from the MnCHOICES Training Site, but the content and process is the same in the MnCHOICES website where Certified Assessors conduct assessments also known as the MnCHOICES production website.

1) Log in to MnCHOICES through SSIS or the MnCHOICES website. Click Assessment on the menu bar. All your assessments should be ONLINE at this point. You can verify this by noting that there are no check marks in the box(es) in the Offline column. You will also see the button that allows you to Check Out for Offline Use.

a. This box is NOT CHECKED

2) Ensure that the assessment or assessments you wish to bring offline are open and have an assessment date. If you go offline with no assessments in your queue, or if none of your assessments have an assessment date, you will receive errors.
MnCHOICES Offline/Online: A screen-by-screen walk through (continued)

3)  

a. Select **Check Out for Offline Use**.

4)  

a. Your screen will show a message indicating you are checking out **Assessments for Offline** along with a button that says **Check Out All Assessments for Offline Mode**.  
If you have several open assessments, it can take a while for this screen to come up. PLEASE WAIT. DO NOT close this window if you think it is taking too long. This interrupts the process of properly checking out your assessments. The more open assessments you have, the longer it will take the screen to show.
5) a. Click **Check Out All Assessments for Offline Mode**

6) a. Click **OK**
7)  

a. Click OK

8)  

a. Click OK
9)  
   a. Click **OK**

10)  
   a. Click **OK**
MnCHOICES Offline/Online: A screen-by-screen walk through (continued)

11) a. Right click inside the empty box

12) a. A smaller rectangle box appears with two options: Silverlight and Install DHS MnCHOICES onto this computer
   b. Click Install DHS MnCHOICES onto this computer
MnCHOICES Offline/Online: A screen-by-screen walk through (continued)

13) a. A pop-up window provides a Security Warning
   b. Click Install

14) A series of Notification Boxes will appear letting you know the files are downloading. These boxes may appear in any order.

   a. Click OK
a. After MnCHOICES is downloaded to your laptop, you will see the log in screen indicating your Data is ready for Offline Mode.

b. MINIMIZE this window and check your desktop for the MnCHOICES icon:
   i. If the icon is not on your desktop, DO NOT continue. Do not make changes to any assessments.
      1. Log back in from the above screen and perform the checkout/check in process again.
      2. If you still don’t have the icon, go to your Mentor.
      3. Mentors:
         a. Take the user through clearing cache and clearing isolated storage and try again. You can also reference Uninstalling MnCHOICES When Desktop Icon is Absent troubleshooting document. Important: If the user HAS made offline changes, DO NOT clear isolated storage. Call the Help Desk.
MnCHOICES Offline/Online: A screen-by-screen walk through (continued)

16) Before you leave your office, check to make sure your assessments are offline. NOTE: Assessments that do not have an Assessment Date will not be taken Offline.

a. Open MnCHOICES from the icon
b. There should be a check mark in each Offline box.

c. Click View for one of the assessments you plan to use when you are out in the field.
d. Make sure you can edit answers in the assessment. Make sure it is not “grayed out.” Note: Certain demographic information is always “grayed out.”
e. Make sure your screen resolution allows you to see all the questions.
   a. The Behavior/Emotion/Symptoms domain is a good place to check to make sure you can see the whole question and the answer fields.
a. Before leaving the office for the assessment, **Logout**

b. **Close** the MnCHOICES window by clicking the **Red “X”** in the upper right corner.
MnCHOICES Offline/Online: A screen-by-screen walk through (continued)

18) When you arrive at your interview destination, **open** your laptop and **start** your computer

   ![MnCHOICES icon on desktop]

   **b. Open** MnCHOICES from the MnCHOICES **icon** on your desktop.

19)   

   a. **Log in** using your SSIS username and password if you are a SSIS-using agency.

   b. **Log in** using your MnCHOICES username and password if you do not use SSIS
MnCHOICES Offline/Online: A screen-by-screen walk through (continued)

20) a. Click **Proceed**

21) a. Find the person you are scheduled to assess and click **View**.
   b. Conduct your assessment and record your conversation and observations in MnCHOICES
   c. Run the **Eligibility Summary** and discuss options with the person
a. When you have finished your assessment interview and discussion, click **Logout**.
MnCHOICES Offline/Online: A screen-by-screen walk through (continued)

23) Close the MnCHOICES window before shutting down your computer and/or closing your laptop.
   a. Click the red “X” in the upper right corner
   b. If you conduct another Assessment before returning to your office, follow the same steps again to access the Assessments that you took Offline.

24) Returning to your office.
   a. Dock your laptop or connect in the usual manner to your agency’s network and/or the internet.
   b. Turn on your computer
   c. Open MnCHOICES from the desktop icon on your desktop
25) a. **Login** with your username and password. **Be sure to use the same Username and password used when out in the field completing the assessment.**

26) a. **Click Proceed**
MnCHOICES Offline/Online: A screen-by-screen walk through (continued)

27) a. Click **Check In for Online Use**

28) a. Click **Check In All Assessments for Online Mode**

29) A Notification box will appear to inform you that a backup of your offline data has been created. In case of an issue during the offline/online process, the Help Desk may be able to use this file to restore your data.
MnCHOICES Offline/Online: A screen-by-screen walk through (continued)

30) Right click in the empty rectangle
b. A smaller rectangle will appear with the options Silverlight and Remove this application
c. Click Remove this application

31)
MnCHOICES Offline/Online: A screen-by-screen walk through (continued)

32) A pop-up box appears asking: **Are you sure you want to permanently remove this application?**
   a. Click **Yes**

33) The MnCHOICES application will be removed from your laptop and disappear from your screen.

34) Open your internet browser window as you normally do by clicking your **internet icon**.

35) Go to the MnCHOICES URL that was provided for your lead agency.

36) The next two messages are IMPERATIVE to assure your work offline uploads to the online server. You MUST see the next two messages for your assessment data to be saved.
   a. If you don’t see these messages, stop IMMEDIATELY and contact your mentor.
   b. **Mentors:** At this point, go through the **Offline Document Restore** process with the user.
c. Message 1: **Retrieving Data entered in Offline Mode.** Click OK

d. Message 2: **Offline Data Changes Saved to the Server.** Your assessment data entered in offline mode is saved to the server BETWEEN these two messages. Please wait until this process completes and you see the second notification box.
a. **Note:** If you are saving a completed assessment back to the server or you have multiple assessments offline, your screen might look like this for several minutes. The more assessments, the longer it takes. Wait for it to finish, even if it seems to you like it’s taking too long or is “frozen.” There is no indication on the screen that the computer is still uploading data, but it is, EVEN THOUGH it says “done” in the lower left corner. Simply be patient.
a. When the message **Retrieving Questions from Local file** disappears and the **login box** appears, log in to MnCHOICES with your username and password.

39)  

a. Click **Proceed**
a. After logging in, you will be on the Person screen. Click Assessment on the menu bar.
MnCHOICES Offline/Online: A screen-by-screen walk through (continued)

41) Notice that your Assessment(s) is now online. You can tell by the absence of a check in the checkbox in the Offline column and a button to use to Check Out for Offline Use.
   a. If your assessment is still OFFLINE at this point, i.e., you STILL HAVE a check in the Offline column stop immediately and contact your mentor. Mentors, contact the Help Desk to request assessments be toggled back to Online Mode.
   b. If your assessment successfully came back online, click the View button to make sure all the answers you entered in offline mode have saved to the server. If there are answers missing, stop immediately and contact your mentor. Mentors, go through the Offline Document Restore process.

42) If your assessment(s) went offline and came back online with all data intact, you have successfully performed the offline checkout/online check-in process!