MnCAT Step 3: Guide Book

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Minnesota Department of Human Services

MnCHOICES
## Table of Contents

Introduction ................................................................. 4

Rules .............................................................................. 5

About MnCAT Step 3 .................................................. 5

Instructions for MnCAT Step 3 – Part 1: Access and Navigation (Counties and Tribes) ................................. 7

  - Person Search and Person Maintenance ................................................................. 7
  - Intake ................................................................................................................... 11
  - Assignment .......................................................................................................... 12

Instructions for MnCAT Step 3 – Part 2: Content (All Lead Agencies) ......................................................... 14

  - Introduction ........................................................................................................ 14
  - Introduction and Overview .................................................................................. 15
  - Person Information ............................................................................................... 16
  - Quality of Life ..................................................................................................... 19
  - Activities of Daily Living (ADLs) ....................................................................... 20
  - Instrumental Activities of Daily Living (IADLs) .................................................. 21
  - Health ................................................................................................................ 23
  - Psychosocial ....................................................................................................... 26
  - Psychosocial (continued) .................................................................................... 27
  - Memory & Cognition ........................................................................................... 28
  - Memory & Cognition (continued) ....................................................................... 29
  - Safety/Self Preservation ....................................................................................... 30
  - Sensory & Communication .................................................................................. 31
  - Employment, Volunteering & Training ............................................................... 32
  - Housing ............................................................................................................. 33
  - Self-Direction ..................................................................................................... 33
  - Caregiver ............................................................................................................ 33
  - Assessor Conclusions ......................................................................................... 34
  - Eligibility Summary ......................................................................................... 34
  - Documents ........................................................................................................ 34
  - Disposition ......................................................................................................... 34

Instructions for MnCAT Step 3 – Part 3: Practice (All Lead Agencies) ........................................................... 35
Introduction ............................................................................................................................................ 35
Getting Started........................................................................................................................................ 36
Participating in a Multi-disciplinary Team Meeting (MDTM) ................................................................. 38
After the Assessment is Complete .......................................................................................................... 39
Producing a MnCHOICES Assessor’s Certificate.................................................................................. 43
Step-by-Step Instructions to Take the Test and Obtain Your Certificate ............................................. 44
After the Celebration is Over .................................................................................................................. 49
Introduction

The MnCAT Step 3 Guide Book will help qualified candidates complete the training for MnCAT Step 3. MnCAT Step 3 has three parts and each part has distinct objectives that, when combined, support the candidate to successfully use MnCHOICES to conduct assessments. Listed below are the three parts and their learning objectives:

**MnCAT Step 3 – Part 1: Access and Navigation**
- Candidates will learn:
  - How to access and navigate the MnCHOICES website
  - About the documents and functions of the MnCHOICES Assessment

**MnCAT Step 3 – Part 2: Content**
- Candidates will become familiar with the:
  - Content of the MnCHOICES Assessment
  - Functions and features of the MnCHOICES Assessment

**MnCAT Step 3 – Part 3: Practice**
- Candidates will demonstrate the ability to:
  - Complete a MnCHOICES Assessment and determine eligibility
  - Analyze and discuss the results of a completed MnCHOICES Assessment
  - Utilize a multidisciplinary team approach to increase their professional expertise and broaden their knowledge specific to person-centered assessment and support planning

Each of the three parts requires you to use the MnCHOICES Training Zone, or MTZ, to complete specific exercises. This guide will help you through all of the exercises.
Rules
The MTZ is a replica of the MnCHOICES Production (PROD) website. The difference is that the data in:
- MTZ is not real
- PROD is real

There are two important rules to remember:
1. Never enter real data about real people like names and addresses in MTZ
2. Never use PROD to practice

Before you begin Step 3, obtain a username, password and the URL for the MTZ from your MnCHOICES Mentor. After you are certified, you will get a new username and password. You will also get the URL for PROD or access PROD through SSIS.

About MnCAT Step 3
As you work your way through Step 3, you will have opportunities to access and use the MnCHOICES Assessment. You will be using MnCHOICES in the Training Zone or MTZ. After viewing certain training sessions, in Step 3 - Part 1, you will be directed to complete specific exercises. Each exercise builds upon the previous one until you have:
- Logged in to the MnCHOICES Assessment
- Searched for and added a person to MnCHOICES
- Created an Intake document
- Created and assigned an Assessment document

Later, in Step 3 - Part 2, you will be directed to:
- Log in to the MnCHOICES Assessment
- Locate the Assessment you created
- Enter an Assessment date
- Open the Assessment
- Explore the content and features of the Assessment document

When you begin Step 3 - Part 3, you will receive a scenario about a person with long-term service and support needs. You will be directed to:
- Log in to the MnCHOICES Assessment
- Locate the Assessment you created
- Open the Assessment
- Complete the Assessment by documenting within it:
  o What is important to the person
  o Needs, strengths and preferences of the person
  o Implications for support planning
  o Referrals you plan to make
Professional conclusions

And other information specific to your scenario

- Use the eligibility summary function along with resulting reports and products
- Analyze and discuss the results, in a facilitated discussion, with your multidisciplinary team
- Review and complete an online training module in TrainLink titled: “What Would You Do?”
- Discuss workflow and strategies with your supervisor or mentor who will provide you with some tools and work aids

The final component of the MnCAT Step 3 training is to complete a short test.

This guidebook offers step-by-step instruction for the exercises you will be asked to complete in MnCHOICES. If you have problems or questions, contact your MnCHOICES Mentor.

We hope you enjoy your hands-on experience and remember to practice!

“...A professional is someone who has a combination of competence, confidence and belief....”

Bunker Roy
Instructions for MnCAT Step 3 – Part 1: Access and Navigation (Counties and Tribes)

Person Search and Person Maintenance

1. Complete these training modules:
   a. Introduction
   b. Logging in through the MnCHOICES URL (Internet) or SSIS
   c. Person Search
   d. Person Maintenance

2. Log in to the MnCHOICES Training Zone (MTZ) using the instructions you received from your Mentor:
   a. Use the MnCHOICES Training Zone (MTZ) URL
   b. Select the Agency you were assigned by your Mentor
   c. Enter the Username you were assigned by your Mentor
   d. Enter the Password you were assigned by your Mentor

3. Conduct a Person Search using Name, DOB, Gender option
   a. Click radio button next to Name, DOB, Gender
   b. Make up a fictitious name that includes:
      i. A brand, name of or type of vehicle – Example: Sally Ford Mustang;
      ii. A fruit or vegetable – Example: Gilbert Grape; or
         Currently we are only using fruits or vegetables
      iii. A musical instrument – Example: Tina Mina Tuba
      iv. An animal or bird – Example: Robert Robin
   c. Select a gender: Male or Female
   d. Enter a date of birth by using your own birthday without the year – Example: If you were born on July 9, 1975, enter 07/09. For the year:
      i. If you chose a name that is a brand, name of or type of vehicle, enter a year that will make the person 65 or older, like 1939
      ii. If you chose a name that is a fruit or vegetable, enter a year that will make the person’s age between 40 and 45, like 1971.
      iii. If you chose a name that is a musical instrument, enter a year that will make the person between 13 and 20 years of age, like 2000.
      iv. If you chose a names that is an animal or bird, enter a year that will make the person between 1 and 4 years of age, like 2013.
e. Click **Search MnCHOICES**

f. Click **Add Person**

g. Re-enter **demographic information**: name, date of birth, gender and add marital status

h. Click **Insert Person**
i. Click **Address & Phone** tab

![Address & Phone Tab](image1.png)

j. Add fictitious **Address** and **Effective Date**

k. Add fictitious **Phone Number(s)**

l. Click **Insert/Update Addresses**

m. Click **Insert/Update Phone**

![Insert/Update Phone Tab](image2.png)

n. Click **Race & Language** tab

o. **Enter information** about the person

p. Click **Insert/Update Races**

![Insert/Update Races Tab](image3.png)
q. Click **Main** tab
r. Click **Update Person** button

s. **Wait** for horizontal blue barber shop pole to finish
t. Click **Add Intake** button

4. Click **Intake** on MnCHOICES Main Menu bar
5. **Locate** your Intake Document in the Intake Queue

Stop now and return to MnCAT Step 3 – Part 1 training
Intake

1. **Complete** these training modules:
   a. Intake
   b. Assignment

2. **Log in** to MnCHOICES using the instructions you received from your MnCHOICES Mentor:
   a. Use the MnCHOICES Training Zone (MTZ) **URL**
   b. Select the **Agency** you were assigned by your Mentor
   c. Enter the **Username** you were assigned by your Mentor
   d. Enter the **Password** you were assigned by your Mentor

3. **Click Intake** on the MnCHOICES Main Menu bar
   a. Click **View** to open the Intake document
   b. **Use the scenario** you received to enter information about your person into the Intake Document.
   c. Click on question groups on the **left navigation panel** to move around in the document or use the “Go To” buttons at the end of the questions and documentation areas on each screen.
   d. When you are done entering information, click the **Disposition** tab on the Intake menu bar.
e. Select the disposition “Assessment Accepted”
f. Make sure your name is on the Assigner button.
g. Click Assign
h. Click OK

Assignment
1. Click Assignment on the MnCHOICES Main Menu bar
2. Notice the Workload grid

3. Find the Assignment grid and the Intake for your person who agreed to have an Assessment
4. In the first column on the left, labeled “Assign To,” click in the empty field cell
5. Use the drop down to choose your name. Your name will be filled into the empty cell
6. Click Assign

7. Click Assessment on the MnCHOICES Main Menu bar and Assessment Queue

8. Notice the “Check Out for Offline Use” button that you will use when you go out to conduct an assessment interview.

9. Notice the Assessor button with your name on it. If you click the drop down, you can see others in your agency who have security access as a Certified Assessor in MTZ.

10. Find the column labeled Assessment Date and click under the column on the line that identifies the Assessment you just created. Use the drop down to enter an Assessment Date. Notice that the column next to it is the Result Date and the same date is also entered there.

You will use this assessment later in your Step 3 – Part 2: Content training. You will also use it in Step 3 – Part 3: Practice training. Now, return to MnCAT Step 3 – Part 1 and take the remaining training modules.
Instructions for MnCAT Step 3 – Part 2: Content (All Lead Agencies)

Introduction
There are eighteen separate training sessions in Part 2. Most of the sessions include instructions to access MnCHOICES so you can explore the content and features of the assessment. First, click “Play” to listen to and view a summary of the instructions. When you click the button to access MnCHOICES, you leave the bulleted text and are taken to MTZ. It is possible to click back and forth between MTZ and the training text by using the button labeled “Training” at the top of the screen and to the left of the “MnCHOICES” button. However, this guide should allow you to focus on the exercise without flipping back and forth between MTZ and the instructions provided on the screen in the training.

The guide is organized in the same order as the MnCAT Step 3 – Part 2: Content training sessions. While the order is recommended, you are not required to take the training sessions in the order they are listed in TrainLink. The basic instructions when instructed to Try It! during MnCAT Step 3 – Part 2: Content training are:

- Click the MnCHOICES blue button on the top of the screen
- Log in to MnCHOICES using the lead agency, username and password given to you by your Mentor
- After you are logged in, you will be on the MnCHOICES Person Screen
- Find the dark gray MnCHOICES main menu bar under the DHS logo
- Click “Assessment” and then “Assessment Queue”
- If this is the very first time you are opening the assessment, you must enter an assessment date before you can open the assessment
- Click “View” to open the assessment
- NOTE: if you are instructed to Try It! more than once during the same session, your assessment will already be open when you click the blue MnCHOICES button to return.
**Introduction and Overview**

1. Click the MnCHOICES button displayed on the training screen. This opens MnCHOICES to the logon screen. Log in.

![MnCHOICES Logon Screen]

2. After logging in, you will see the MnCHOICES Person Screen.

![MnCHOICES Person Screen]

3. At the top of the screen is the dark gray MnCHOICES main menu bar.

4. Click Assessment on the main menu bar and then click Assessment queue.

5. You should see the assessment you created. If not, stop now and contact your Mentor.

![MnCHOICES Assessment Queue]

*When you have finished, click the Next button to continue.*
Person Information

1. Click the MnCHOICES button

2. Log in using the information provided to you by your MnCHOICES Mentor

3. Click Assessment on the main menu bar and then click Assessment queue

4. Locate your assessment and click view

5. Find and click the Person Information domain on the left navigation panel

6. Go into each of the question groups we just reviewed and enter data. Try different things to see what happens:
   a. In Reason for Contact and Referral Source select “calling about myself”. Then, change it to “someone else”
   b. In demographic information, try to enter or update information. Go to the bottom of the screen to select phone service and contact preference
   c. In the lead agency and communication information question group, try different ways to enter lead agency information. Try to update the ethnicity and language information.
d. Under decision making and emergency contact answer questions with no and then change to yes. See how that makes the conversation flow differently.

When you have finished, click the Next button to continue.
7. Click the blue MnCHOICES button

8. You should still be logged into MnCHOICES.
9. Find and click the Health Insurance, Payers and Providers question group on the left navigation panel. Answer the first few questions NO. Go back and change the answers to YES and see what happens. Next, review the two tables and enter some information.

10. At the bottom of the Health Insurance question group screen, click the “Go to OBRA level I Developmental Disability or Related Condition” button on the right to move to that question group.

11. Review and answer the questions. Note the instructions at the bottom along with the signature area and print button.
12. Click the OBRA Level I – Mental Illness question group and do the same thing.
13. Last, click the Referral Reason and Intake summary question group and explore the types of information that can help prepare you for the assessment.

When you have finished, click the Next button to continue.
Quality of Life

1. Click the MnCHOICES button at the top of the page.

2. Log in using the information given to you by your MnCHOICES Mentor.

3. Click Assessment on the MnCHOICES main menu and then click Assessment Queue.

4. Click view on the assessment of the person you created and that is in your queue.

5. After the Assessment opens, click the Quality of Life domain on the left navigation panel.

6. When the question groups are displayed, click Relationships.

7. Answer questions and watch the question indicator number go down.

8. Find the table called “Keeping in Touch.” If a person indicates that typically they do things as often as they would like, there may not be a need for additional follow-up.
NOTE: If the person you created an assessment for is a child, there is no “Keeping in Touch” table. If your person is a child, simply explore all the question groups in Quality of Life.

9. If a person indicates they don’t talk to friends, relatives or others on the phone, you can follow up with additional questions to explore if the person would like to talk on the phone more often and whether they might need some support.

10. If the answer changes from “Not at All” to “Would Like to Do More Often,” you will be prompted to complete the level of needed support. Under the table is a comment box to describe the specific support.

   When you have finished, click the Next button to continue.

Activities of Daily Living (ADLs)

1. Click the MnCHOICES button at the top of the page.

2. Log in using the information given to you by your MnCHOICES Mentor.

3. Click Assessment on the MnCHOICES main menu and then click Assessment Queue.

4. Click View on the person you created and who is in your assessment queue.

5. After the assessment opens, click ADLs on the left navigation panel.
6. Choose several ADL and equipment question groups to discover what is contained in each of them.

When you have finished, click the Next button to continue.

Instrumental Activities of Daily Living (IADLs)

1. Click the MnCHOICES button at the top of the page.

2. Log in using the information given to you by your MnCHOICES Mentor.

3. Click Assessment on the MnCHOICES main menu and then click Assessment Queue.
4. Click View on the person you created and who is in your assessment queue.

5. After the assessment opens, click IADLs on the left navigation panel.
6. Choose several IADL question groups to discover what is contained in each of them.

When you have finished, click the Next button to continue.

Health

1. Click the MnCHOICES button at the top of the page.

2. Log in using the information given to you by your MnCHOICES Mentor.

3. Click Assessment on the MnCHOICES main menu and then click Assessment Queue.

4. Click view to open the assessment in your queue

5. Find and click the Health Domain on the left navigation panel
6. First, explore the General Health question group and answer some questions.
   a. Notice the types of preventative services listed.
   b. In the Risk Screening section, answer YES to at least one question about using the ER, staying in the hospital or spending time in a nursing facility. Don’t forget to include the number of times.

7. Now, explore the HELPS Brain Injury Screen

When you have finished, click the Next button to continue.
8. Click the MnCHOICES button at the top of the page.

9. You should still be logged in and the assessment should still be open.

10. The Health domain should still be expanded.

11. First, click on the Symptoms, Conditions and Diagnosis question group to see the types of symptoms, conditions and diagnoses listed in this question group. If you are unsure of what fits into which symptom, condition or diagnosis, select YES and read the list of options. For example, if you aren’t certain what is included in Neurological/Central Nervous System, select YES. You can see a list starting with Alzheimer’s. This is a good way for you to learn which symptoms, conditions and diagnoses fit where on this screen.

12. Next, click the Treatments and Monitoring question group. Scroll through the entire table to begin to get familiar with the treatments and monitoring you will find listed here. Select one of the treatments and see what happens.

13. Last, click the Therapies question group and explore the therapy table. Select at least one therapy to see what happens.

When you have finished, click the Next button to continue.
Psychosocial

1. Click the MnCHOICES button at the top of the page.

2. Log in using the information given to you by your MnCHOICES Mentor.

3. Click Assessment on the MnCHOICES main menu and then click Assessment Queue.

4. Click view to open the assessment in your queue

5. Click the Psychosocial domain on the left navigation panel
6. Click the Behavior, Emotion Symptoms question group.
7. Review the list of behaviors, emotions and symptoms by scrolling down through the list
8. Answer YES to at least one behavior area
9. Review and respond to the additional questions
10. Notice the question pattern for the behavior which is the same or very similar for each behavior in the table
Psychosocial (continued)

When you have finished, click the Next button to continue.

11. Click the blue MnCHOICES button at the top of the page.

12. You should still be logged in to MnCHOICES and the assessment should still be open.

13. The Psychosocial domain should still be expanded.

14. Depending on the age of your person, click on and explore the screening tool available to you:
   a. Pediatric Symptom Checklist;
   b. Patient Health Questionnaire; or
   c. Geriatric Depression Scale.

15. Enter answers and see how the table tabulates the score.
16. Then, review the interpretation of the score.

When you have finished, click the Next button to continue.
Memory & Cognition

1. Click the MnCHOICES button at the top of the page.

2. Log in using the information given to you by your MnCHOICES Mentor.

3. Click Assessment on the MnCHOICES main menu and then click Assessment Queue.

4. Click view to open the assessment in your queue

5. Click Memory & Cognition on the left navigation panel.
6. Click the Functional Memory and Cognition question group and explore these three activities.

7. Answer “Undetermined” to the first question which is about psychological results and is specific to the determination of a Developmental Disability or Related Condition. Then, change the answer to YES, due to developmental disabilities or a related condition.

8. Record that the person has a documented diagnosis of brain injury and review the additional questions.

9. Answer YES to the third question down about cognitive problems at home school or work. See how the table works by selecting one of the impairments by clicking in the check box in front of it.

   When you have finished, click the Next button to continue.

**Memory & Cognition**

1. Click the blue MnCHOICES button at the top of the page.
2. You should still be logged in to MnCHOICES and the assessment should still be open.
3. The Memory & Cognition domain should still be expanded.
4. Click on the Mental Status Evaluation question group.
5. Click YES and complete the test.

   When you have finished, click the Next button to continue.
Safety/Self Preservation

1. Click the MnCHOICES button at the top of the page.

2. Log in using the information given to you by your MnCHOICES Mentor.
3. Click Assessment on the MnCHOICES main menu and then click Assessment Queue.
4. Click view to open the assessment in your queue.

5. Click Safety/Self Preservation on the left navigation panel.

6. Click any, or all, of the question groups and explore how you will document information in this domain. Make sure to try the following:
   a. In the Personal Safety question group, choose NO and then choose YES to the first question. Notice that a comment box appears if you click YES and provides you with a place to explain any limits placed on decision-making for the person.
   b. In the Personal Safety question group, scroll down below the first several comment boxes to the list of questions. Notice that sometimes if you select NO you will see additional probing questions and sometimes you get the additional questions if the answer is YES.

When you have finished, click the Next button to continue.
Sensory & Communication

1. Click the MnCHOICES button at the top of the page.

2. Log in using the information given to you by your MnCHOICES Mentor.
3. Click Assessment on the MnCHOICES main menu and then click Assessment Queue.
4. Click view to open the assessment in your queue.

5. Click the Sensory & Communication domain group on the left navigation panel. Explore the entire domain.

6. Make sure to:
   a. Click the Vision, Hearing and Functional Communication question groups and see the difference between clicking NO, the person does not have problems and YES the person does. See why it is important to choose YES if the person does not have issues but uses a device.
   b. Click the Sensory Integration question group and see the difference between checking NO and Unsure. See why it is important to choose Unsure if the person has issues but no diagnosis.

   **When you have finished, click the Next button to continue.**
Employment, Volunteering & Training

1. Click the MnCHOICES button at the top of the page.

2. Log in using the information given to you by your MnCHOICES Mentor.
3. Click Assessment on the MnCHOICES main menu and then click Assessment Queue.

4. Click view to open the assessment in your queue.

5. Click Employment, Volunteering and Training on the left navigation panel.
6. Click the Employment question group on the left navigation panel.
7. Look at the first question. Answer NO and review the conversation.
8. Change the answer to YES and see how the conversation changes.

When you have finished, click the Next button to continue.
Housing

There is no specific exercise for this domain. Feel free to access MnCHOICES and explore the Housing domain and question groups to review the contents and features.

Self-Direction

There is no specific exercise for this domain. Feel free to access MnCHOICES and explore the Self-Direction domain and question groups to review the contents and features.

Caregiver

1. Click the MnCHOICES button at the top of the page.
2. Log in using the information given to you by your MnCHOICES Mentor.
3. Click Assessment on the MnCHOICES main menu and then click Assessment Queue.
4. Click view to open the assessment in your queue.
5. Click the Caregiver domain on the left navigation panel
6. Click the Caregivers question group.

7. Explore the Caregivers table including the drop down menus for Relationship and Caregiver Role.
   a. Enter a name
   b. Decide if they live with the person
   c. Use the drop downs to select the Relationship of the caregiver to the person and their role and
   d. Check all the types of care they provide for the person

When you have finished, click the Next button to continue.

Assessor Conclusions
There is no specific exercise for this domain. Feel free to access MnCHOICES and explore the Assessor Conclusions domain and question groups to review the contents and features.

Eligibility Summary
There is no specific exercise for this function. Feel free to access MnCHOICES and explore the Eligibility Summary tab to review the contents and features. Remember, because you have not completed an assessment, you will not be able to use this function now. You will see how this works during MnCAT Step 3 – Part 3: Practice.

Documents
1. Click the MnCHOICES button at the top of the page.
2. Log in using the information given to you by your MnCHOICES Mentor.

3. Click Assessment on the MnCHOICES main menu and then click Assessment Queue.
4. Click view to open the assessment in your queue.

5. Locate the three Document Domains at the end of the left navigation panel.
6. Click each one to open it.
7. Explore the questions in each of the three documents by choosing YES, you want to complete a document.

NOTE: At this time, you will not be able to use the Document function by clicking one of the three Document Assessment tabs. This is because you have not yet run the Eligibility Summary so the data to complete the document is not filled in. You will get to see how this works when you complete MnCAT Step 3 – Part 3: Practice.

When you have finished, click the Next button to continue.

Disposition
There is no specific exercise for this function. Do NOT go in to MnCHOICES and explore the Disposition tab. If you do, you will risk losing the assessment you created. You will see how the disposition function works during MnCAT Step 3 – Part 3: Practice.
Instructions for MnCAT Step 3 – Part 3: Practice (All Lead Agencies)

Introduction
MnCAT Step 3 – Part 3: Practice, is the final component in your training to become a Certified Assessor. During Part 3, you have several specific tasks:

- Complete an assessment in MnCHOICES using the scenario provided by your Mentor or Supervisor (p. 36)
- Run Eligibility (p. 39)
- Review and analyze the results (p. 40)
- Make notes about findings including any determinations that don’t seem appropriate
- Attend an agency multidisciplinary team meeting and discuss your findings with the team (p. 38)
- If necessary, revise any documentation based on discussion
- Re-run Eligibility
- Complete any required documents (LTCC/DD screening documents and PCA service agreement)
  
  NOTE: At a minimum the LTC question group must be completed and the document produced (p. 40)
- Print and/or save assessment, eligibility reports and documents (p. 41)
- Close assessment with appropriate disposition and closing notes
- Find the closed assessment and review it
- Complete an online course in TrainLink called “What Would You Do?”
- Work with a “coach” (supervisor, mentor or colleague) to learn:
  - Agency workflow and process
  - Program and service regulations, practices and policies
  - Who within your agency has special knowledge/expertise about certain programs, services, processes or populations
  - “Tips” of the trade that will help you become comfortable with using MnCHOICES
- Take the Step 3 – Part 3 test and pass with at least 80% proficiency

Before getting started, make sure you:
- Completed Parts 1 and 2 of MnCAT Step 3
- Completed a Person Search and added your fictitious person to MnCHOICES
- Created an Intake for your person
- Created an Assessment for your person and assigned it to yourself
- Received a copy of the scenario you will use to complete your assessment

If you have not completed the steps above, stop now and contact your Mentor.
Getting Started

1. **Log in** to the MnCHOICES Training Zone (MTZ) using the information you received from your Mentor:
   - URL (web link)
   - Lead Agency
   - Username
   - Password

The log in screen looks like this:

![Log in Screen](image1.png)

2. **After logging in click Proceed:**

![Proceed Button](image2.png)
3. Click **Assessment** and then click **Assessment Queue**:

4. Find the Assessment you created in Step 3 – Part 1. **Click View** to open the assessment.

5. **Use the scenario** you received and your professional experience to **fill in information** about the person. Although the scenario is a male, if you created a female, it does not matter.
6. Keep entering information until you **complete an assessment** for your person. You will know when the information is complete because all the question indicators will be zero.

7. If you do not enter all the information at one time, simply **click logout** on the main menu bar. When you want to return to the assessment and enter more information about your person:
   a. Log in to MTZ
   b. Click Assessment and Assessment Queue
   c. Click View on your person’s assessment
   d. Continue to add information until all the question indicators are zero

8. Always click Logout on the main menu bar. This assures data entered on the last screen is saved

9. You will use this completed assessment to:
   a. Run eligibility;
   b. Analyze the results; and
   c. Discuss findings with your peers during a multi-disciplinary team meeting

**Participating in a Multi-disciplinary Team (MDT)**

As a Certified Assessor, you need to have a command of many things such as:

- Understanding about the needs of people with many different types of needs and conditions
- How certain conditions impact the day to day needs of people
- What community resources are available to best meet the specific needs of each person
- Eligibility requirements for programs and payers to help people afford the services and supports they need
There is so much to learn and to know, that it can feel overwhelming. But, don’t worry. This knowledge comes over time through experience, research and relationships. An important key to your success will be your participation in your agency’s multi-disciplinary team (MDT). The MDT is required by statute. It may be comprised of all staff from your agency, or your MDT may consist of a collaborative team of members from two or more lead agencies. At a minimum the team must have a social worker and registered nurse who are MnCHOICES Certified Assessors.

The MDT is a place to bring questions and ask for consultation. It is a place to share concerns, practices, questions, strategies and successes. It is a place to hold each other accountable to a consistent and professional standard of practice. The value of your MDT will be discovered during this last component of MnCAT Step 3.

**After the Assessment is Complete**

After you enter all the information from the scenario about what is important both to and for your person, and all question indicators are set to zero (0), you are ready to move on to the last items to check off your training list. These last items can be completed in any order that makes sense for you, your supervisor, your mentor and your MDT:

- Using the Assessment you created and completed, click the Eligibility Summary tab and then the Determine Eligibility button.

- After the processing indicator (barber pole) stops spinning the Eligibility Summary is complete and ready to view. Click on the plus symbols to reveal eligibility information. Click on minus symbols to hide the information.
Use the information within the Eligibility Summary to analyze the results of the Eligibility determination.

- Expand the sections by clicking on the items and/or the “+” symbol. Notice the information that is provided as to what eligibility criteria was met or not met based on the assessment response selections.
- Are the results as you expected?
- If not, locate information and responses entered into the Assessment that may need to be changed. You can make necessary changes in the assessment by returning to the Assessment document. Note: you will need to run the Determine Eligibility function after any changes.

Additional Documents

- At a minimum, complete the Long Term Care (LTC) Screening Document domain
- In the Assessment at the bottom of the left navigation panel, locate the LTC Screening Document domain and click to open
- Notice that information needed for the LTC SD that was entered into the Assessment is populated into the domain
- Answer the remaining questions needed for you or another staff person to do the data entry of the LTC SD into MMIS (Note: Ask your supervisor, mentor or coach about how you can get any needed MMIS training)
- Go to the Eligibility Summary tab and click Determine Eligibility
- Click the LTC Screening Document Tab on the Assessment menu
- Review the information provided for completing the LTC SD in MMIS
• Practice printing the LTC SD by clicking the Print LTC Screening Document button
  o Print to a local printer and get the paper document to review
  o After clicking the Print button, also practice making the LTC SD into a PDF and send to someone else or save to your computer (see instructions below)
  o In the same manner, practice using the Microsoft XPS Document Writer to save the LTC SD to your computer

θ Return to the Eligibility Summary tab and practice creating both an Eligibility Summary and a Planning Summary (Hint: If you left MTZ and return later to work on MnCAT, you will need to first Determine Eligibility again)
  • Click the Print Full Eligibility Summary or Planning Summary button
  • Click the printer icon to create a paper document
  • Click the PDF icon to create and save a PDF of the Summary
Click the Print tab on the Assessment which reveals two useful products: Assessment Report and PCA Printout for Providers

- Practice selecting and deselecting Assessment domains
- Practice printing and making a PDF for some or all of the Assessment
- Click the PCA Printout for Providers
- Practice printing and making a PDF of the Provider report

Check with your supervisor or coach and find out when the next scheduled MDT meeting is scheduled. Request time during the meeting to review the work you have done in Step 3. Be prepared to discuss your findings from the scenario and the results of your assessment with the team members.

Schedule one or more sessions with your supervisor, mentor and/or coach to discuss important elements about your role as a Certified Assessor that are intrinsic to MnCHOICES but not part of MnCAT such as:

- Your agency workflow, process requirements and expectations
- Other related training you may need such as MMIS, SSIS, data practices, etc.
- Resources, aids and tools to help you be successful in your new role

Take the online course in TrainLink: “What Would You Do?”

- Discuss these situations with your supervisor, mentor or coach
• Think about other situations you’ve encountered in the past or are concerned might happen in the future. Discuss these with your supervisor, coach or MDT and receive guidance on how to best handle them in a person centered practice

☐ When you and your supervisor determine you are ready to become a Certified Assessor:

• Get the link to the Step 3 – Part 3 final test
• Take and pass the test with at least 80% proficiency
• Follow the instructions to obtain your certificate

**Producing a MnCHOICES Assessor’s Certificate**

After you complete MnCAT and pass the final test and your supervisor indicates you are ready to have MnCHOICES Assessments assigned to you, the first thing you need to do is obtain your certification. To receive your certificate:

• Ask your MnCHOICES Mentor/Supervisor for the Step 3 test link
• Log in to TrainLink
• Take the short true/false MnCAT Step 3 Test
• Pass with at least 80% proficiency

After you pass the test:

• Print your certificate
• Have the designated agency administrator sign it
• Scan the signed copy and save it to a PDF
• Provide your Mentor/Supervisor with a copy
• Send a copy to HR for your personnel file
• Display a copy proudly in your workspace
Step-by-Step Instructions to Take the Test and Obtain Your Certificate

1. Click the Step 3 Test link (URL) given to you by your Mentor
2. The TrainLink screen below appears and is labeled MnCHOICES Step 3 – Test
3. Click Sign On in the upper right hand corner
4. Sign On using your Unique Key
5. Click OK
6. Locate the MnCHOICES Step 3 – Test on the right side of the screen
7. Click on the MnCHOICES Step 3 – Test option
8. You will be on the MnCHOICES Step 3 – Test screen showing you the Course Detail
9. Click Start Course to begin the test

10. First, you may want to click on the Prerequisites tab
11. To take the test, you must see an indication that you completed MnCHOICES Step 3 – Part 2

12. When you click Start Course, and if you met the Prerequisites, you will see the first screen of the MnCAT Step 3 – Test
13. Before starting, click the Settings button
14. The first option is the default. (red arrow) If you don’t select a Speed Setting the training automatically requires the learner to first click Next and then click Start to begin each page.

15. Selecting the second option (green arrow) requires the learner to first click Next to advance the page, but the new page begins without needing to click Start.

16. The Settings button appears at the bottom of each page so the learner can change the setting at any time during the test.

17. Click back to return to the title page.

18. The next slides provide simple instructions for taking the test and navigating within it.

19. If you do not score at least 80% correct, go back to the TrainLink screen with course detail, content and prerequisites. Choose Restart Course in the upper right corner of the screen.
a. You can take the test as often as needed to pass the course
b. If you pass the test, **never** click Restart Course or your test answers are deleted and you need to take the test again

20. Passing the test brings up the screen below. Click the View Certificate button in the bottom middle of the screen

![Test Results Screen]

21. You should see your personal certificate. It includes:
   a. Your name as it appears in TrainLink
   b. The date your certification begins
   c. The date your certification ends
   d. Signature from DHS indicating you successfully completed your MnCHOICES Certified Assessor Training
   e. A PDF button, in the lower right corner, that allows you to save the certificate to your computer

![MnCHOICES Certification Screen]
22. After you save the PDF of your certificate, print out a copy
   a. Take the copy to your designated agency administrator (supervisor/manager)
   b. Your agency administrator will co-sign your certificate to indicate that:
      i. You meet the education requirements to be a Certified Assessor
      ii. You met the experience requirements to be a Certified Assessor
   c. Once co-signed, your certificate is official

23. In addition, you should receive a certification by email from TrainLink that you completed the MNCAT Step 3 – Part 3 test. Print and/or save the confirmation in case it is needed for future reference.

24. Your list of MnCHOICES Courses will also show your status in the Step 3 – Part 3 Test as Finished

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>MNCH8010</td>
<td>MNCHOICES STEP 3 - PART 3: TEST</td>
<td>Finished</td>
</tr>
</tbody>
</table>
After the Celebration is Over

After the fireworks have ended and the confetti is swept away, it’s time to begin your practice as a Certified Assessor. Your agency will decide when it is appropriate to provide you with access to the MnCHOICES Production (PROD) site including instructions about how to access it. See your mentor for this information.

The most important thing you can do is to continue to use MTZ to practice. The more experience you have exploring and entering information into MnCHOICES before you go out and conduct your first “real” assessment is invaluable. We know it feels awkward in the beginning, but with continued use you will be using MnCHOICES like the pro you are. Even when you are a seasoned veteran, you may want to return to MTZ to try out a new function or feature of MnCHOICES before doing it in the field.

Congratulations on all the hard work you did to become a MnCHOICES Certified Assessor!

Minnesota Department of Human Services

MnCHOICES