
Purpose:
A visual, step-by-step document that describes how to use the changes made to specific functions and tasks for the MnCHOICES application in version 14.3.

8/11/2014

1. Assessment Report
The Assessment Report displays an easy to read account that includes all of the questions and answers connected to question indicators (identified with an asterisk*), needed to determine eligibility and important to person-centered support planning, as well as any additional comments and questions that were answered. The entire Assessment Report is about twelve (12) pages long and can be created in online or offline mode.

Offline:
The offline report provides a review of the assessment content and can help the certified assessor identify asterisked question indicators that still need to be answered to determine eligibility.

Online:
When created online, the assessment, or certain domains of the assessment, can be shared as needed with the person assessed, their case manager, a service provider or an appeals referee.

The report is organized by domains and questions, as they appear in the assessment, and can be accessed/viewed and printed from two different locations:

- Document History Grid within the Person function
A. Click on the **Assessment Report** button for the identified assessment listed in the Document History grid in the Person function

B. The Assessment Report automatically displays in its entirety

- **Print tab function** within the assessment

![Assessment Report](image)

A. Click the **Print** tab within the current open assessment

B. The Print function screen displays a list of Assessment Domains with all domains pre-selected

![Print Function](image)

C. To **remove** the pre-selected domains and choose only certain domains:

![Select Domains](image)
a. Click the check box in the upper left corner beside the term **Select All** to remove the check mark which will de-select the Select All default

i. Click in the **check box(es) in front of the domain(s)** that are needed for the Assessment Report; or

ii. Click one or more check boxes for specific domains to remove them from the Assessment Report

b. All **domains preceded by a check mark will be included** in the Assessment Report

c. Click the **View Assessment Report for Selected Domain(s)** button
D. The report can be developed and viewed/printed for:

- New Assessments
- Re-Assessments
- Health Risk Assessments (HRAs)
- HRA-Fulls
- Eligibility Updates

E. There is no need to “run” eligibility to use the Assessment Report function. Whether online or offline, an Assessment Report can be created and viewed at any time during the assessment process. However, it can only be printed when online. The report can be saved as a PDF document and used as an attachment for emailing.

Each page of the Assessment Report has identifying information at the top including:

- Person’s Name
- Assessment ID number
- Document Status
- Person’s Date of Birth
- Assessment Date
- Caregiver Name
- Assessor Name and Lead Agency
- Eligibility Run Date
- PMI#
- Result Date

The bottom of each page:

- Identifies the page as that from a MnCHOICES Assessment Report
- The date the report was printed
- Shows page X of Y (i.e. Page 1 of 5)
F. Decide how to use the Assessment Report

a. View

   i. The report can be viewed on your computer screen one page at a time

   ii. Use the Minus or Plus magnifying glass to increase or decrease the font size (green)

   iii. Use the drop down to find an option to “Fit to Width” at the bottom of the percentage list which will expand the report to the width of your screen (blue)

   iv. Use the arrow keys to move advance or return to pages. (yellow)

   ![Image of viewing options]

b. Print

   i. Click the printer icon at the top of the Assessment Report

   ![Image of printer icon]

   ii. Follow the process you normally do to use your computer’s print function

   ![Image of printer interface]
c. Save to PDF

i. Click the PDF icon at the top of the Assessment Report

ii. Use PDF Export Options as needed and click OK

iii. Click OK to save the Assessment Report in a PDF format
iv. Name the Assessment Report and save to the desired location in your computer system

2. Eligibility Summary

The Eligibility Summary tab of the Assessment has three functions that assist the certified assessor with sharing information with the person, other professionals, providers, advocates, support staff and others (within data practices requirements) about the outcomes of the assessment and service and program options for support planning.

- After using the **Determine Eligibility** function, while in the person’s home, the certified assessor can use the information about Level of Care, Service and Program Eligibility, Case Mix, Activities of Daily Living and Behavior along with all the findings to confirm with the person what was documented. In addition, the assessor can discuss the Assessed Needs and Support Planning Implications with the person to review what is important to and for the person, which allows both the person and the assessor to gain a sense of next steps.

- Back at the office, the assessor can choose to **Print the Full Eligibility Summary** which is a document that expands every plus (+) sign included in the eligibility determination. The Full Eligibility Summary is about a **fifteen (15) page document**. The Full Eligibility Summary can be shared, as needed within data practice parameters.

- The assessor also has the option to view, print or save the **Planning Summary** which includes all the Assessed Needs and Support Planning Implications along with a
simplified summary that includes Level of Care, Waiver Programs, Additional Programs and Services. The entire Planning Summary is a **two (2) page document that can only be created online**. The Planning Summary is a designed to be a user-friendly document to share with the person and/or their representative.

**NOTE:** At the present time, it is not possible to include the **hours of PCA services** for which the person qualifies on the Planning Summary. Changes are underway to develop a data base that will allow the hours to be displayed in the future. Until that time, certified assessors will want to consider **writing** the number of hours on the Planning Summary as displayed on the Eligibility Summary.

- There are **two versions** of the Planning Summary. MnCHOICES automatically determines which version to display based on the person’s age based on the “Result Date.”
  - Version for persons under **65** years of age
  - Version for persons **65 and older**

**NOTE:** If the assessor is online, both the Full Eligibility Summary and the Planning Summary can be utilized without first Determining Eligibility. However, without running eligibility, only the Assessed Needs and Support Planning Implications will be on the Summaries.

A. Determine Eligibility for Confirmation and Discussion

   a. Conduct assessment interview and **complete the assessment**
   b. **Click Eligibility Summary** tab (green)
   c. **Click Determine Eligibility** button (yellow)
   d. **Click OK** to Process Answers to Determine Eligibility (orange)
   e. Allow Ilog to **run the rules**
f. Use the Eligibility Summary displayed on your computer screen to **confirm findings and discuss potential options** with the person

i. **Click plus (+) signs** to expand the topic and reveal additional information (green)

ii. **Click minus (-) signs** to close the topic when the discussion is finished (yellow)

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B. **Print Full Eligibility Summary**

a. When online:

i. **Follow steps a – f. above** in Determine Eligibility for Confirmation and Discussion

ii. **Click Print Full Eligibility Summary** button
iii. Follow usual procedures for printing to your printer

iv. Collect the Full Eligibility Summary paper document from your printer

1. Document will be about 15 pages long

2. All pluses(+) will be expanded upon printing to allow for review of complete information related to eligibility

3. All Assessed Needs and Support Planning Implications are printed in their entirety

4. A header on each page includes:
   a. Name of the person who received the assessment
   b. Assessment ID number
   c. Assessment Date
   d. Result Date

v. Pages are numbered in the bottom right hand corner revealing page x of y (i.e. 1 of 14)
C. Planning Summary

   a. **Follow steps a – f. above** in Determine Eligibility for Confirmation and Discussion

   b. **Click Planning Summary** button

   c. Viewing the Planning Summary

      i. The summary can be **viewed on your computer screen** one page at a time

      ii. Use the Minus or Plus magnifying glass to **increase or decrease the font size** (green)

      iii. Use the drop down to find an option to “Fit to Width” at the bottom of the percentage list which will expand the report to the width of your screen (blue)

      iv. Use the **arrow keys to advance** or return to a page. (yellow)

   d. Printing the Planning Summary

      i. **Click the printer icon** at the top of the Summary report displayed on your screen

      ii. You may get a notice that the pages are ready and a request to confirm that you want to continue with the printing process. **Click Print**
iii. Follow the process you normally do to use your computer’s print function

iv. Collect paper document from your printer

1. Document will be **two pages** long

2. All **Assessed Needs and Support Planning Implications** are **printed** in their entirety on the first page

3. A **header on each page** includes:
   a. Name of the person who received the assessment
   b. Assessment ID number
   c. Status of the assessment
   d. Date of birth of the person who received the assessment
   e. Assessment date
   f. Name and lead agency of the certified assessor
   g. Eligibility run date
   h. PMI number
   i. Result date

4. The **bottom of each page includes**: 

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a. Name of the document: MnCHOICES Planning Summary

b. Date the document was printed

c. An indication as to whether the format used was for a person under 65 or 65+

d. Page number x of 2

b. Saving the Planning Summary to PDF

i. Click the PDF icon at the top of the Planning Summary displayed on your computer

![PDF icon](image)

ii. Use PDF Export Options as needed and click OK

![PDF Export Options](image)

e. Click OK to save the Planning Summary in a PDF format

![Save as PDF](image)
f. **Name** the Planning Summary and **save** to the desired location in your computer system.

![Image of file manager]

**When offline**, you will probably not have access to a printer. However, you can save the Full Eligibility Summary, after Determining Eligibility, to your laptop. When you are back at the office, you can go online and email/print the document and send to the person.

i. **Follow steps a – f. above** in Determine Eligibility for Confirmation and Discussion

ii. **Click Print Eligibility Summary To File** button or **Print for CSP to File** button

![Image of software interface]

iii. When your computer’s normal print pop-up appears, slide the **navigation bar** over to the right (Green oval below)

iv. Options to save the selected document include making a **PDF** or saving to **OneNote**
v. Choose Microsoft XPS Document Writer to make a PDF or choose Send to OneNote to save the document in OneNote (Yellow rectangle below)

vi. Click Apply and then Print (Orange oval below)

vii. If making a PDF, choose the location on your computer to save the document.

3. Additional Content Added to Personal Care Assistance (PCA) Service Agreement Question Group
MnCHOICES v14.3 now includes all information that may be needed to complete a PCA Service Agreement in the Medicaid Management Information System (MMIS). If there is additional information needed, print the PCA Service Agreement Document and write in the additional data. If you have questions about how to answer some of the questions, ask someone in your agency who does the data entry for MMIS. In addition, you may want to check the MMIS Reference Guide for additional direction. For assistance resolving issues with PCA Service Agreements, you may contact the Disability Services Division Resource Center.

4. Data Export Reconfiguration
The data export feature allows lead agencies to extract MnCHOICES data entered in MnCHOICES documents to develop their own reports. MnCHOICES can generate up to ten (10) xml files from MnCHOICES data for a selected date range. If the range selected requires creating more than ten (10) files, MnCHOICES prompts the user to select a shorter date range.

A. Access MnCHOICES through SSIS or the MnCHOICES URL.
B. Select Data Export on the Main Menu bar.
C. Design your Data Export by choosing a date range, privacy parameters and batch size:
   a. **Date Range**
      i. Dates used for starting and ending dates are the dates documents were created in MnCHOICES
      ii. Select the first date in the range by entering a date in the **Start Date** field; or
      iii. Use the calendar (green) and the toggle buttons (yellow) to find the month and then click on the date (orange).
Repeat the process in i. and ii. above to enter the last date of the range in the **End Date** field.

b. **Demographics Availability**
   
i. There are three data type options:
   1. All data including **protected**
   2. Only public/non-protected data
   3. **Masked** protected data
   
ii. Each data export may only display **one data type**
   
iii. Click the radio button preceding the correct data type for the export

c. **Calculate Batches**
   
i. Batches can range from **1 document to up to 300** documents
   
ii. **Enter the preferred number** of documents for each batch by either:
   
1. Entering the number in the Documents per Batch field (green); or

2. Using the up and down arrows which increase/decrease the amount of Documents per Batch by 50 at a time (orange).
iii. Click the **Calculate Batches** button (yellow)

iv. The number of total batches will be calculated and displayed

1. If the date range selected requires that more than ten batches be prepared, MnCHOICES will prompt you to **select a shorter date range**

v. The number of batches is related to the total number of documents (Intakes, HRAs, New Assessments, HRA-Fulls, Eligibility Updates, Reassessments) created in the date range and the documents requested per batch

vi. **Click each Prepare Batch # button** to obtain the data and save to your computer
vii. The blue “fetching” bar will scroll while the information for the batch is being retrieved

viii. Click the Export Batch button for each batch prepared by MnCHOICES

ix. MnCHOICES advises on how many documents were exported in the batch
x. MnCHOICES will prompt you to save the data file. **Click OK**

i. The data exported includes all documents created during the date range, information entered in the documents and dates of events for that document such as Date Assigned, Date Closed, etc.

ii. Use your preferred reporting software to work with the exported data.

5. Increase Isolated Storage
To assure that MnCHOICES will appropriately save all the data entered into assessments when certified assessors are working offline, the amount of space that MnCHOICES can use on the workstation’s hard drive was increased from 80 MB to 200 MB. In addition, there is an option within the User Profile function, to increase the isolated storage space by 100 MB at a time to a maximum of 500 MB.
A. Click User Profile on the MnCHOICES Main Menu bar and choose the Settings option

B. Click the Backups tab

D. A pop-up window will display the question “Do you want to increase available storage?” and if you do, click the YES button. If you don’t, click the NO button and the message will disappear.
E. Each time the process occurs, the available storage increases by 100 MB. After three increases, the maximum of 500 MB is reached. It is not possible to increase storage beyond the 500 MB and clicking the Increase Storage button will result in no action.

6. Automatic PMI Update  
A person’s PMI (Person Master Index) number is a piece of data that cannot be manually entered into MnCHOICES by a user. At the time of the first person search, if the person does have a PMI number, it will be populated during the State Search. For people who obtain a PMI after an Intake or Assessment is created, the system will automatically populate the PMI # into the MnCHOICES document. This occurs once a day following the point in time when the PMI registers in SWNDX. Users do not need to take any action to have the PMI populate into documents. Every person entered into MnCHOICES gets a PMI number.

7. Online/Offline Error Message  
If a certified assessor attempts to login to MnCHOICES through the internet (online mode) and their assessments are downloaded to their laptop, to conduct assessment interviews in the community (offline mode), they will get a message telling them that MnCHOICES is in offline mode and they need to use the MnCHOICES icon on their desktop or Start Menu to log in and use MnCHOICES

A. Click OK and proceed to open MnCHOICES in offline mode

B. Once MnCHOICES is open, assuming the assessor is now at their workstation, upload assessments to the server by completing the process to bring MnCHOICES back to online mode.
8. Show/Hide Domain Menu
Some certified assessors were not able to optimally set the resolution on their laptops. This meant that on certain screens they were not able to view the complete screen and the scroll bars did not move far enough to reveal the entire screen. A new feature was added to the Settings function that allows certified assessors to hide the Domain Menu on the left of the assessment screen which provides more screen space to view the assessment. The setting can be applied or disabled when assessors are in online or offline mode.

A. Click User Profile function on the MnCHOICES Main Menu Bar (green circle below)

B. Click the Settings option (yellow circle above)

C. Click the Enable Show/Hide Domain Menu Button check box (green circle)
E. A notification message appears to advise that the settings were saved. Click OK
F. The Show/Hide Domain Menu button is now visible on the assessment.

G. To hide the domain menu, click the Show/Hide Domain Menu button. The domain menu will be hidden and a larger portion of the screen displays assessment questions.

H. To navigate between domains and question groups, the assessor needs to:
   
a. Use the buttons at the bottom of the screen which navigate one screen back or one screen forward; or
b. Click the Show/Hide Domain Menu button to show the domain menu and select

![Image](image1.png)

c. To remove the Show/Hide Domain Menu button, return to the User Profile on the MnCHOICES Main Menu Bar

   i. Click Settings

   ii. Click in the check box in front of the Show/Hide Domain Menu Button

   iii. Click Save Settings

![Image](image2.png)