Reassessment Rollout Checklist

Version 1: 7/7/15

Purpose
The purpose of this document is to provide counties and tribes with a checklist for understanding and tracking the steps for planning, organizing and implementing the MnCHOICES Reassessment Rollout.

All Counties and Tribes Prior to Reassessment Rollout

- **Read and understand the following documents found on MnCHOICES CountyLink (available soon)**
  - MnCHOICES Reassessment Rollout Guidance Document
  - Case Manager’s Recipient Information Form (CMRI) (an accessible version will be coming out in the near future and will be posted to CountyLink)
  - MnCHOICES Interagency Contact Point (MICP)
  - MnCHOICES Reassessment Rollout Frequently Asked Questions (FAQs)
  - DHS Recipient List Report (available to lead agencies beginning July 15, 2015)

Lead Agency Responsible for Reassessment

- **Review and Organize Data**
  - DHS Recipient List Report
  - Lead agency internal lists
  - Contracted case management lists

- **Create Reassessment in MnCHOICES**
  - Conduct person search in MnCHOICES
    - If person is found, skip next bullet point
    - If person is not found in MnCHOICES, create person in MnCHOICES
  - When the case manager (CM) **is not** the certified assessor (CA)
    - Create a MnCHOICES Intake
      - CM completes the *Case Manager’s Recipient Information Form* (CMRI)
      - Enter information from CMRI form into MnCHOICES Intake domain
    - Select *Abandoned Disposition* to close the MnCHOICES Intake
  - When the case manager (CM) **is** the certified assessor (CA)
    - Go to Assignment of Reassessment to Certified Assessor, see below

- **Assignment of Reassessment to Certified Assessor**
  - Select *Add Reassessment* from the Person and Activities for [person’s name] screen, select *Add Reassessment.*
  - Select Assigner in dialogue box, and click *Create/Assign*
  - Assigner goes to Assignment Queue and assigns to certified assessor
  - Person’s Reassessment document is accessed in the CA’s Assessment Queue
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Certified Assessor

- **Receive Assignment(s) and Prepare for Reassessment**
  - Organize workload to accommodate Reassessment(s)
  - Review MnCHOICES Person Information domain including:
    - Who needs to be contacted and/or involved in the Reassessment
    - Are there any safety issues for the assessor or special accommodations needed for the person
    - If the person is considered an accurate self-reporter
    - Consult with CM if additional clarification or information is needed
  - Review person’s plan(s), e.g., CSP, CSSP, ISP, etc.
  - Review previous LTSS assessment(s), e.g., LTCC, DD Screening, and/or PCA Assessment

- **Schedule Reassessment**
  - Follow lead agency protocol for scheduling appointments, obtaining interpreters, etc.
  - In Assessment Queue:
    - Enter the date of Reassessment in the Assessment Date column.
    - Enter the first day of the next service agreement span in the Result Date column
  - Coordinate with CM, as needed per person’s situation
  - Inform CM of Reassessment date, time and location

- **Conduct Reassessment**
  - Face-to-face interview
  - Document what is reported, observed and reviewed
  - Run eligibility
  - Complete Community Support Plan Worksheet (DHS-6791A)

- **Finalize the Reassessment and Complete Required Documents**
  - Contact CM, as needed or agreed to from previous communications, i.e., Reassessment Rollout Guidance Document
  - Complete and provide Community Support Plan (CSP) to person/legal representative, CM, and others, as appropriate prior to closing
  - Complete Lead Agency Assessor/Case Manager/Worker LTC Communication Form (DHS-5181), as needed and give to CM. CM submits document to the financial worker
  - Complete Notice of Action (NOA) as discussed with CM/CFR and send to person
  - Enter data into MMIS per lead agency protocol
o LTC Screening Document (Required for all Reassessments)
o PCA Service Agreement per eligibility determination
o DD Screening Document per eligibility determination
✓ Close Reassessment by Selecting Appropriate Disposition
  o Note: Prior to closing the Reassessment, CA contacts the CM when:
    ▪ The MnCHOICES Eligibility Summary and factors affecting the Reassessment results indicate changes in eligibility or the resources available, e.g., budgets; and/or,
    ▪ The MnCHOICES Eligibility Summary indicates the person is ineligible for a service/program they requested; and/or
    ▪ The person chooses different program/service options
✓ If the CA is not the CM, the CA provides the following information to the CM:
  o MnCHOICES Community Support Plan (CSP) Worksheet (DHS-6791A)
  o MnCHOICES Community Support Plan (CSP) (DHS-6791B)
  o MnCHOICES Assessment Report
  o MnCHOICES Eligibility Summary
  o MnCHOICES Planning Summary
  o MnCHOICES PCA (Provider) Report
✓ If there is not a CM, but person will continue to receive publicly funded LTSS:
  o CA completes the CSSP, PCA Service Agreement, PCA (Provider) Report and other documentation as needed for the person to receive services as outlined in their CSP

Case Manager

✓ Inform Person of New Reassessment Process. Explain the:
  ✓ MnCHOICES assessment
  ✓ CA role (eligibility) versus the CM role (support planning)
  ✓ Process for scheduling and preparing/informing the CA for the reassessment
  ✓ Length of time for assessment

✓ Provide to Certified Assessor
  ✓ Current Support Plan, e.g., CSP, CSSP, ISP, etc.
  ✓ Most recent LTSS assessment, e.g., LTCC, DD Screening, PCA Assessment
  ✓ Rule 185/DD CM eligibility information
  ✓ Case Manager’s Recipient Information Form (an accessible version will be coming out in the near future and will be posted to CountyLink)
Inform Provider(s) of Scheduled Reassessment
   ✓ Communicate anticipated Reassessment date with direct service providers, per person’s request
   ✓ Instruct where and how to submit information for the CA’s consideration prior to Reassessment

Complete the Coordinated Services and Supports Plan (CSSP)
   ✓ Receive completed assessment information from CA and review CSP with person
   ✓ Create and finalize CSSP with person

Complete Other Tasks as Required or Needed
   ✓ Rate Management System (RMS) for disability waivers, Elderly Waiver Customized Living (CL) tool
   ✓ CM/CFR responsibilities, e.g., approvals for ongoing CCB/DD Waivers, CDGS budgets and other county-coordinated services
   ✓ MMIS entries per lead agency protocol