

Type D screening document: Service change

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Overview	<p>This guide explains the required fields to update an existing Type D DD screening document for action type 03 when:</p> <ul style="list-style-type: none"> • Authorized (i.e., planned) services are implemented. • Changes are needed in case manager information on the ADD1 panel. • Current/planned services are reviewed or changed on the ADD3 panel. 	
A SCR panel	<p>The county/tribal nation must:</p> <ol style="list-style-type: none"> 1. Type the letter C (change) in the ACTION CODE field. 2. Type the letter D in the DOCUMENT TYPE field. 3. Enter the person's person master index (PMI) number (field 5) in the RECIPIENT ID field. 4. Press a transmit key to advance to the ADD1 panel. 	
ADD1 panel	<p>MMIS does all of the following:</p> <ul style="list-style-type: none"> • Auto-populates fields to reflect current status of the person receiving services and DD screening document history. • Assigns and auto-populates the document control number (field 1) in the DOCUMENT NBR field. • Auto-populates the person's RECIPIENT ID and NAME fields based on the PMI number entered on the ASCR panel. <p>The document status will be DOC STAT: S SUSPENDED. The county/tribal nation should not attempt to change this status.</p> <p>The county/tribal nation must:</p> <ol style="list-style-type: none"> 1. Enter the person's birth date (field 8) in MMDDYYYY format in the DOB field. MMIS brings the date in the REF DATE field forward. Do not change the referral date (field 10), guardianship status in the GRDN STAT field (field 11) or diagnosis ICD codes in the DIAG 1-4 fields (fields 13–15). 2. Enter the case manager's national provider index (NPI) or unique Minnesota provider index (UMPI) number (field 17) in the second CM NAME/NBR field. MMIS auto-populates the case manager's name after the county/tribal nation presses the F9 key. Do not change the RECIP, LGL REP, CASE MGR, QDDP and OTHER field entries. 3. Enter the action date in MMDDYY format in the ACTION DT field. 4. Enter the action type code 03 – SERV CHG in the ACTION TYPE field. 5. Enter Y (yes) or N (no) in the TEAM CONVENED (Y/N) field to indicate the assessor met with the person and his/her legal representative, if applicable. Do not change MMIS assessment field codes (fields 26–33). 6. Press the HOME key to move the cursor to the NEXT field. 7. Enter ADD3 in the NEXT field. 8. Press a transmit key to advance to the ADD3 panel. The county/tribal nation does not need to make changes on the ADD2 panel. 	
ADD2 panel	<p>If the county/tribal nation is using the DD screening document to communicate a person's functional needs change that the certified assessor completed via telephone, the county/tribal nation must:</p> <ol style="list-style-type: none"> 1. Enter assessment information or review field entries for fields 34–38. 2. Enter the assessed level of care for the person in LEVEL OF CARE field (field 39). 3. Press a transmit/enter key to advance to the ADD3 panel. 	
ADD3 panel	<p>The county/tribal nation must:</p> <ol style="list-style-type: none"> 1. Confirm the Y (yes) or N (no) code in the INFORMED CHOICE(Y/N) field is correct. 	

	<p>2. Update the codes in the first CODE field for CURRENT SERVICES. Enter new service codes, or delete codes for discontinued services.</p> <p>3. Update the codes for PLANNED SERVICES in the second CODE field to reflect changes made to current services.</p> <p>4. Press a transmit/enter key to advance to the ADD4 panel.</p>
<p>ADD4 panel</p>	<p>The county/tribal nation should update fields as appropriate, paying close attention to the assessment result/exit reason and effective date, following these steps:</p> <ol style="list-style-type: none"> 1. Complete or review field entries on the ADD4 panel with assessment information summarized on the DD screening document. 2. Leave the DT&H SERV AUTH LEVEL field (field 43) blank. MMIS calculates and auto-populates the DT&H SERV AUTH LEVEL field after the county/tribal nation presses function key F9. 3a. Enter the appropriate waiver need index code (field 44) in the WAIVER NEED INDEX field: <ul style="list-style-type: none"> • 001 = 0-12 months. • 002 = 13-36 months. • 003 = 37+ months. • 004 = Currently on the DD Waiver. • 005 = Not requesting the DD Waiver. 3b. If the county/tribal nation enters 001 in drop-down 1, the county/tribal nation also must enter an urgency category in drop-down 2: <ul style="list-style-type: none"> • 006 = Institutional exit category. • 007 = Immediate need category. • 008 = Defined need category. 4. Enter a Y (yes) or N (no) to indicate if the person needs special services (field 45A-I). 5. Enter the appropriate value to indicate the person's choice for final action planned (field 46A-C). 6. Enter the assessment result in field 47a. 7. Enter the exit reason in field 47b, if applicable. 8. Enter in the date the assessment result is effective in field 48. 9. Enter the appropriate code in the MCAID SVC PROG field (field 49): <ul style="list-style-type: none"> • Use program 00 when a person is new to the DD Waiver or not currently receiving waiver services. • Use program 01 when the person is currently open on the 01 DD Waiver diversion. • Use program 02 when the person is currently open on the 02 DD Waiver conversion. 10. Enter a Y (yes) or N (no) to indicate which of the following signatures were captured on the Long-Term Services and Supports Assessment and Program Information and Signature Sheet, DHS-2727 (PDF): <ul style="list-style-type: none"> • CASE MGR SIG. • QDDP SIG. • PERSON/LGL REP SIG. • CFR SIG. 11. Press a transmit/enter key to advance to the ADHS panel.
<p>ADHS panel – DHS comments</p>	<p>The DHS reviewer uses the DHS COMMENTS panel to document actions taken or to request clarification from the county/tribal nation during the review process. The county/tribal nation responds to DHS requests for clarification on the ACMG panel.</p>

	<p>DHS must:</p> <ol style="list-style-type: none"> 1. Enter any necessary notes or response to the county/tribal nation. Comments are considered public record. 2. Date and initial all comments. 3. Press a transmit/enter key to advance to the ACMG panel.
ACMG panel – Case manager comments	<p>MMIS may bring CASE MANAGER COMMENTS from a previous DD screening document to the current document. MMIS only brings comments forward when the previous document status is:</p> <ul style="list-style-type: none"> • S (suspended). • R (replaced). • D (denied). <p>The county/tribal nation must:</p> <ol style="list-style-type: none"> 1. Select text and press the DELETE key to delete comments that no longer apply. 2. Enter any necessary case manager notes or response to DHS. Comments are considered public record. 3. Date and initial all comments. 4. Press a transmit/enter key to advance to the ARCP panel.
ARCP panel – Recipient comments	<p>The county/tribal nation must:</p> <ol style="list-style-type: none"> 1. Enter comments made by the person receiving services that are relevant to this document. Comments are considered public record. 2. Date and initial all comments. 3. Press a transmit/enter key to return to the ADD1 panel (i.e., beginning of queue).
MMIS exception control function	<p>The county/tribal nation must:</p> <ol style="list-style-type: none"> 1. Press function key F9 to activate the MMIS exception control function after completing required fields. MMIS: <ul style="list-style-type: none"> • Compares data just entered with data stored in MMIS. • Posts exception codes that apply in the EXC fields. • Auto-populates additional fields, such as the description associated with a valid value (code) entered in a field. 2. Read exception code text to help resolve errors. 3. Resolve exception codes with a status of 3 (i.e., deny) or 4 (i.e., suspend) in the ST field that are not DHS reviewer exception codes. 4. Press function key F9 again to clear exception codes.
Finalize full-team DD screening document	<p>MMIS automatically enters A (APPROVED) in the DOC STAT field when all exception codes are resolved. The county/tribal nation should press function key F3 to save the results and exit. The county/tribal nation does not need to take further action on the approved action type 03 service change DD screening document.</p>
Next steps	<p>After the document is approved, the county/tribal nation must update the current type R or S service agreement to reflect changes to the person's services.</p>
Additional resources	<p>DD Screening Document, DHS-3067 (PDF) MMIS Reference Guide – DD screening document for developmental disabilities</p>