Minnesota Department of Human Services
MnCHOICES

Navigating the Application: Quick Study

Person Search

- ❑ **Choose** Search method and provide information:
  - ♦ **Person Master Index** (PMI) = 8 numeric characters
  - ♦ **Social Security Number** (SSN) = 8 numeric characters: NO DASHES
  - ♦ **Name, Gender, Date of birth** (mm/dd/yyyy) NOTE: may use age range instead of DOB
- ❑ Click "Start Search"
  - ♦ If person is listed in "Person search results," choose the "Select" button in front of the person's name.
  - ♦ If person is not listed, click "Person match not found in MnCHOICES, Search State instead" button to continue. If a match is then found, choose the "Select" button in front of person's name.
  - ♦ If person is NOT on list, select the "Add Person" button, to add the person to MnCHOICES.
- ❑ System now displays "Person and Activities for XXXXX".

Person and Activities for XXX

- ❑ If this person was from State Search push the "Insert Person" button; this will bring information into MnCHOICES.
- ❑ If the person was known to MnCHOICES, added or inserted, "Person" information can be updated.
- ❑ Complete or Update the following tabs:
  - ♦ Main
  - ♦ Address & Phone
    - ⇒ After entering address (be sure to enter Effective Date) push the "Insert/Update Addresses" button.
    - ⇒ After the phone numbers push the "Insert/Update Phones" button.
    - ⇒ After entering the email information push the "Insert/Update Emails" button.
  - ♦ Race & Language
    - ⇒ Complete all questions that appear. After they are all complete push the "Insert/Update Races" button.
  - ♦ After information is entered on tabs, return to the Main tab and select the "Update Person" button; this will save the information to Intake.
- ❑ After all information is saved, select the "Add Intake" button; the Intake Section will appear.

Navigating the Application: Quick Study

Health Risk Assessment (HRA) – Managed Care Organizations only

- ❑ On the "Person and Activities for XXX" choose "Add HRA" tab to create a Health Risk Assessment. This will send it to Assignment Queue. **Intakes are not completed for HRAs.**
    - ♦ Follow Assignment Queue instructions.
    - ♦ Continue to "HRA Assessment" and complete all questions.
    - ♦ When questions are complete, choose "Close HRA with the following disposition".
        - ⇒ Complete – Individual refused HRA
        - ⇒ Complete via Phone – full needs assessment not required.
        - ⇒ Complete via Mail – full needs assessment not required
        - ⇒ Complete via Face to Face – full needs assessment not required
        - ⇒ Complete – assessment required – move onto MnCHOICES assessment.
    - ♦ Choose one of the above and click on the "Close HRA" button.
    - ♦ If you select **Complete – assessment required – move onto MnCHOICES assessment**

Intake Questions for XXX – Counties and Tribes only

These questions can be accessed in two ways:

- ❑ Select the questions in the Quick Launch on the left, or
- ❑ Clicking the right button on the bottom after you have finished with the questions on the current page.
- ❑ Complete all information requested.

After all questions have been completed

- ❑ Select the 'Dispositions' tab.
- ❑ Click on the circle in front of the appropriate "Disposition" of Intake.
    - ♦ Assessment Accepted
    - ♦ Assessment Declined
    - ♦ Abandoned
- ❑ If the "Disposition" is accepted, a dropdown box will appear.
- ❑ Select the desired assigner from the dropdown box. It will go to the Assignment Queue.
- ❑ If the "Disposition" is Declined or Abandoned the document will be closed.

Assignment Queue

- ❑ Go down to "Assignment" find the document.
    - ♦ Go over to "Assign To" column on the right.
        - ⇒ Click the blank box under the "Assign To" on the line of the document to be assign. Then click on the name of the assessor.

- ♦ Go to the “Assign” column.
  - ⇒ Click on the Gray “Assign” button next to their name.
- ❑ The document has now been assigned to the person for an assessment.

Assessment Queue

The assessment queue is the place where all the open documents assigned to you for an assessment are listed. To change demographic information select on the “Person” button.

- ❑ Select Assessment in the menu bar and then Assessment Queue.
- ❑ Find person you want to do an assessment.
- ❑ Go to the “Assessment Date” column
  - ♦ Click the blank box under the Assessment Date on the line of the person you want to start an assessment. Either type in or choose the date from the calendar.
  - ♦ Click the “View” button.
- ❑ Current Assessment – each Domain (i.e., Quality of Life) has a number to the right to signify the total number of questions NOT answered within that domain. If number is greater than zero a question needs to be answered to continue with Assessment.
  - ♦ Click area on left side of each Domain that has a number greater than zero.
  - ♦ Click on the Group (i.e., Routines and Preferences) within the Domain that has a number greater than zero.
  - ♦ All required questions will have an asterisk showing which questions are required in this group. The numbers will go down as required questions are answered.
  - ♦ Complete all required questions that appear until the number is down to zero.
  - ♦ Continue answering questions in all Domains that have a number greater than zero.

After all questions have been answered, all Domain numbers are zero, you are ready to determine eligibility.

- ❑ Select Eligibility Summary tab.
- ❑ Click “Determine Eligibility” button. Window will appear stating “Processing Answers to Determine Eligibility”, click OK. Eligibility has been run.
- ❑ Select “Dispositions” tab. Choose one of the following:
  - ♦ Pending; or Closed complete, with Outcome either “Complete” or Abandoned;
  - ♦ Click arrow on “Assessment Performed By”, select person that did assessment.
  - ♦ Type in any comments.
  - ♦ Save document Notification Box will appear stating “Assessment is closed now”, click OK

Navigating the Application: Quick Study

Offline Mode

The system supports the following Assessment Types in Offline Mode: New Assessment, Reassessment, HRA, and HRAF. ONLY assessments that have the status of Open or Pending can be taken offline.

When user takes assessment(s) offline, system will take ALL assessments(s) with an “Open” or “Pending” status assigned to that user.

- ❑ Go to the Assessment Queue and Click “Check Out for Offline Use” button. Wireframe (User’s name) Check Out Assessment for Offline for (Lead Agency) will display.
- ❑ Click “Check Out All Assessments for Offline Mode” button. This will display “Downloading files needed for Offline Mode” Notification Box.
- ❑ Click “OK” on Notification box. This display “Ilog Executable saved to Isolated Storage” Click “OK” on Notification Box. This will display “MnCHOICES Ruleset saved to Isolated Storage” Notification Box.
- ❑ Click “OK” on Notification Box. This will display instructions on how to create an icon on desktop files.
- ❑ Right click in the instruction box. This will give you a choice of “Silverlight” or “Install DHS MnCHOICES on to this computer.
- ❑ Click on “Install DHS MnCHOICES on to this computer”. This will create an icon and download files into icon. System will automatically close online and takes user to offline landing page.
- ❑ Log in “Offline Mode”. System will navigate user to the Assessment Queue.

When user has completed working on assessment(s) offline.

- ❑ Click “Check in for Online Use” button in Assessment Queue.
- ❑ Click “Check in Assessment for Online Use” button in Notification Box. This will display instructions on how to remove MnCHOICES from computer.
- ❑ Right click in Notification Box. This will give you a choice of “Silverlight” or “Remove this application”.
- ❑ Select “Remove this application. A Notification will appear asking “Are you sure you want to permanently remove this application”.
- ❑ Click “YES” button. This will remove MnCHOICES application from computer.
- ❑ You will receive a Notification Box stating “Retrieving Data entered in Offline Mode”.
- ❑ Click “OK” in Notification Box. This will update the Online files with the information added in Offline.
- ❑ You will be at the online MnCHOICES landing page. Log into system.