

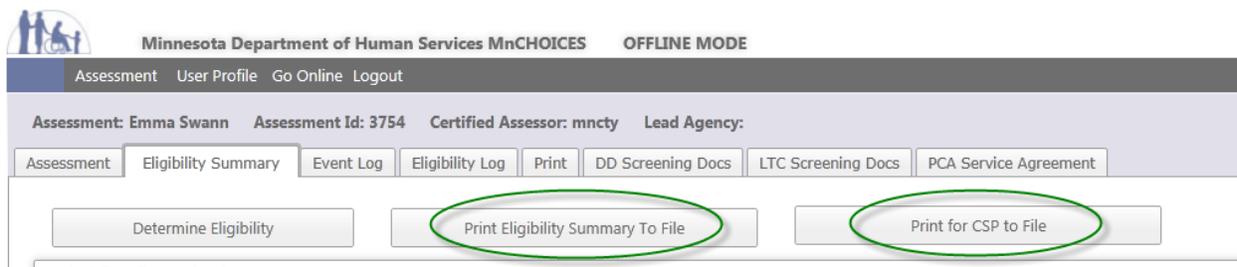
# Version 14.1–Release Notes Companion

*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 14.1.*

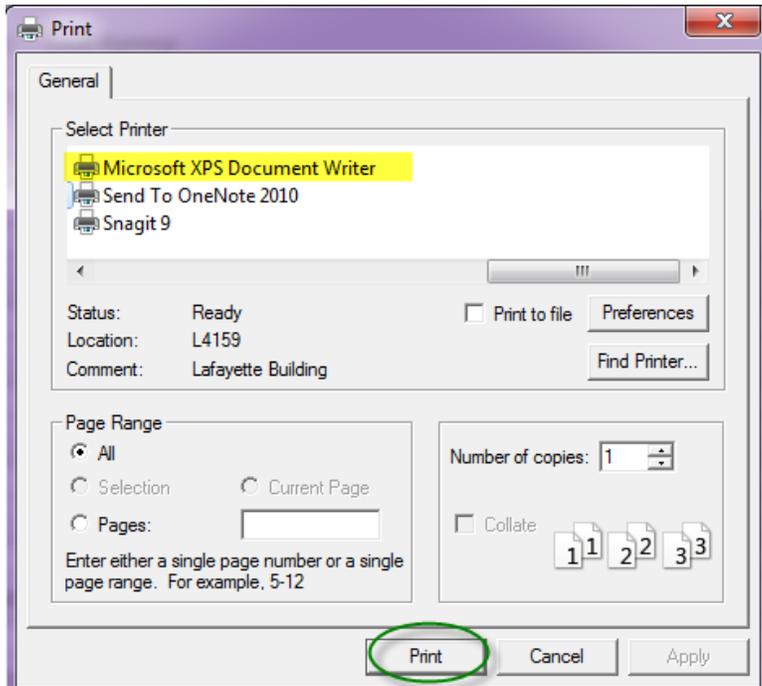
## Printing to File in Offline Mode

In Offline Mode, the user can select the option to print to file. This means that the Assessment Report is saved to the user's computer as a pdf, xps, or other document, depending on what type of virtual print client the Lead Agency has installed on the user's workstation. A virtual print client is software that a lead agency may have installed which enables the user to print to a file (analogous to saving the file to the computer) instead of to a printer, which would produce a paper copy. Please contact your lead agency IT department for further information about your particular virtual print client.

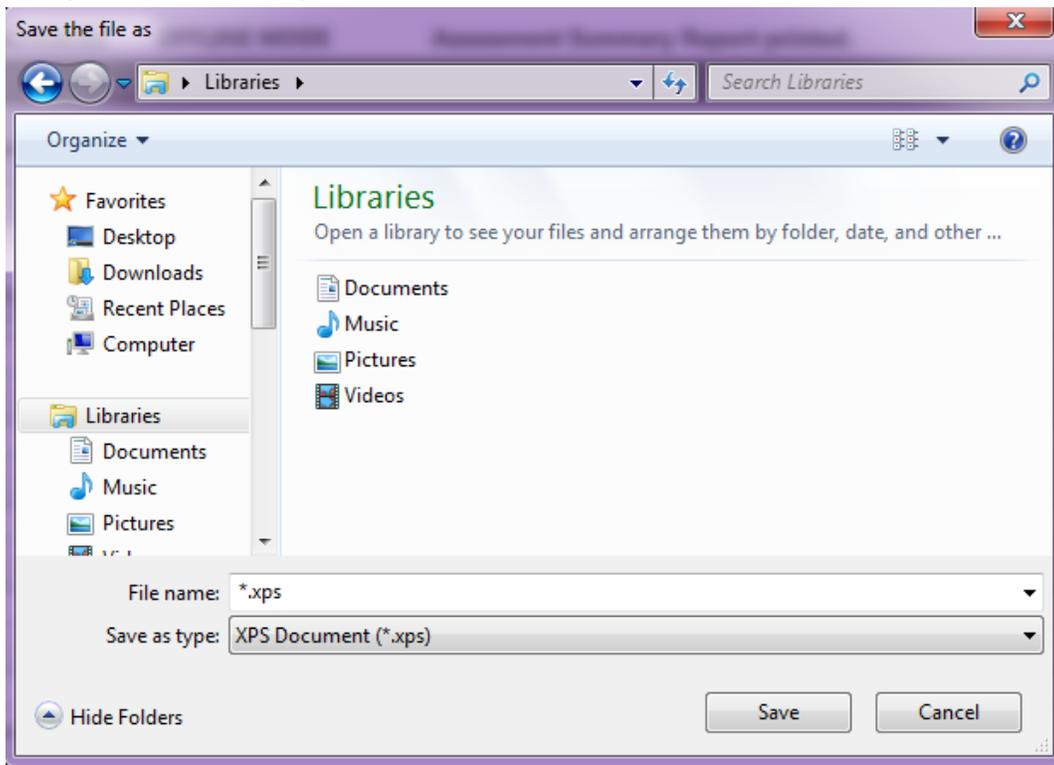
1. Complete **Assessment** in Offline Mode.
2. Select **Eligibility Summary** tab and **Determine Eligibility**.
3. Select the appropriate printing function from the two buttons:
  - a. **Print Eligibility Summary To File:** Prints the full Eligibility Summary with messages about which criteria were met and which were not met.
  - b. **Print for CSP to File:** Prints an Eligibility Summary that is provided as part of the Community Support Plan.



4. A print dialogue box will appear. Select the option for your virtual printer and click **Print**:



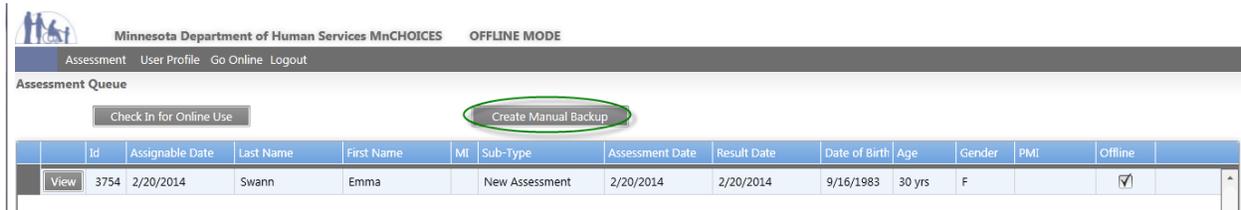
5. Depending on what virtual print client your agency uses, you will most likely be prompted to save your file to the computer.



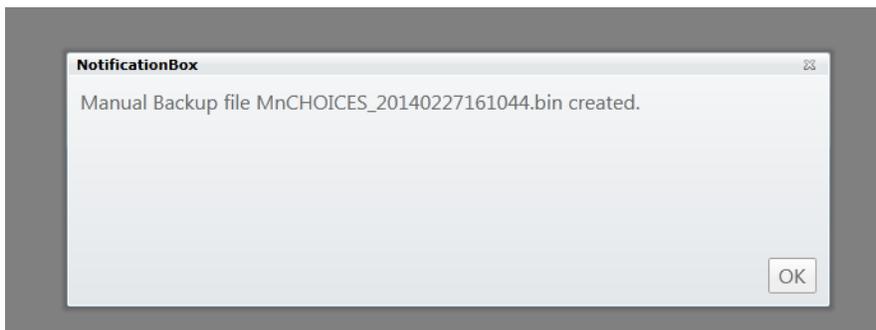
## Change Offline Answer Storage Process to Archive User Data

1. An assessor is able to make a **Manual Backup** in both **Online** and **Offline Mode**.

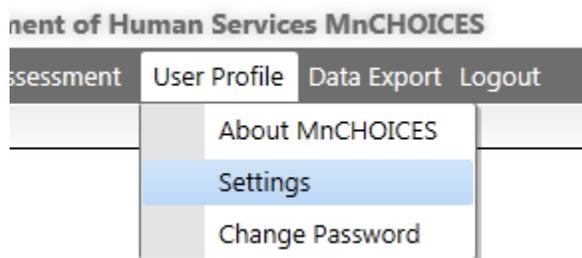
- a. In **Offline Mode**, the **Manual Backup** button is located in the **Assessment Queue**, next to the **Check In for Online Use** button.



- i. Clicking the button will create a file in isolated storage.
- ii. The user will be notified that the file has been created.

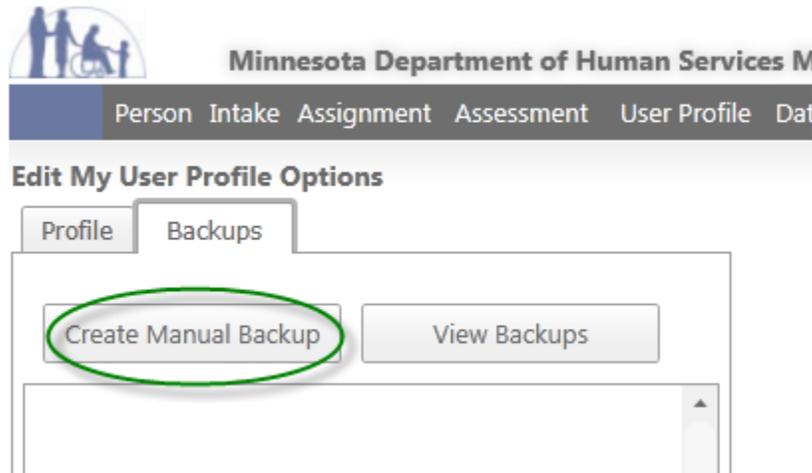


2. In **Online Mode**, it is in the **User Profile** menu under **Settings**.

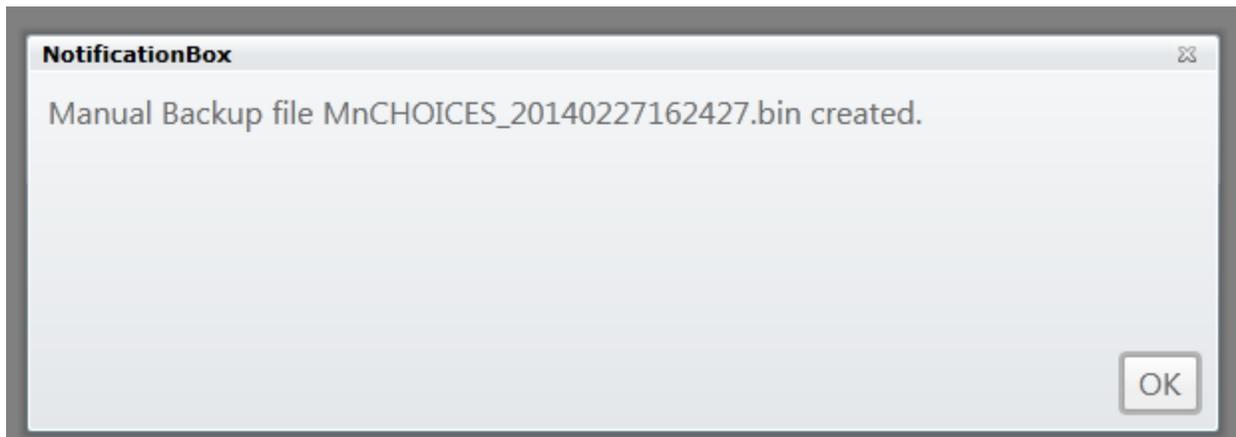


- a. Select the **Backups** tab

- b. Click on **Create Manual Backup**

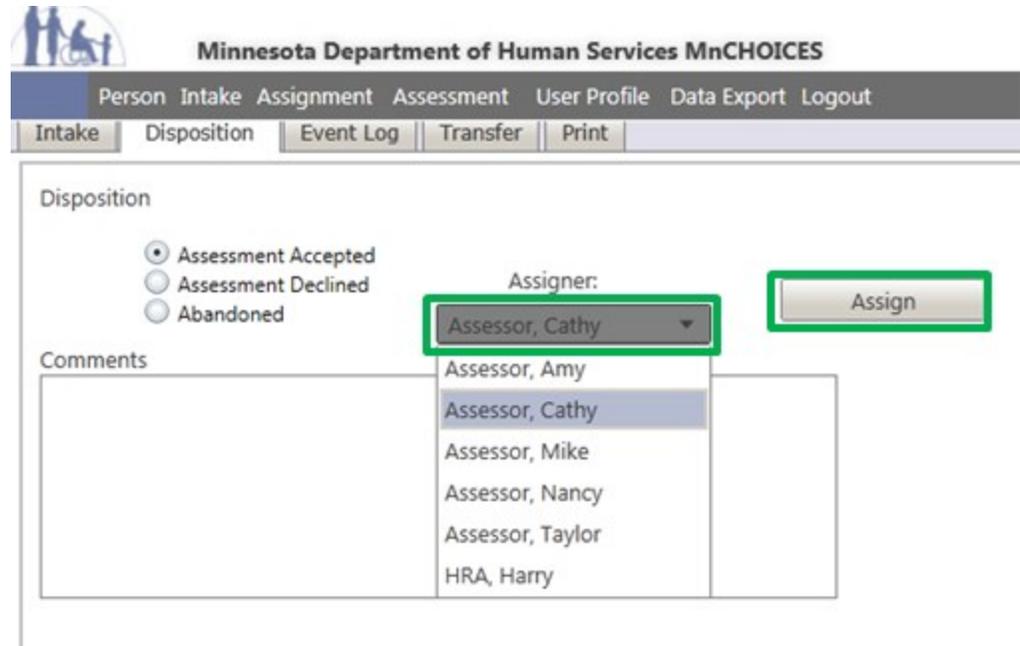


- c. The user will be notified the file is created.



## Assignment and Assignment Queue for Multiple Assigners

1. Complete **Person Search** process.
2. Conduct **Person Maintenance** if needed and **Update Person**.
3. **Select** appropriate document from button options:
  - a. **Add Intake**
    - i. Complete Intake process and select **Disposition**
    - ii. If disposition is Assessment Accepted two buttons will display:  
Assigner and Assign
    - iii. Click the Assigner button to display all assigners in your agency.
    - iv. Select the assigner who will decide which certified assessor will be responsible to complete the assessment.
    - v. Click Assign and the intake will move to the queue of the assigner that was selected.



**Minnesota Department of Human Services MnCHOICES**

Person Intake Assignment Assessment User Profile Data Export Logout

Intake Disposition Event Log Transfer Print

Disposition

Assessment Accepted  
 Assessment Declined  
 Abandoned

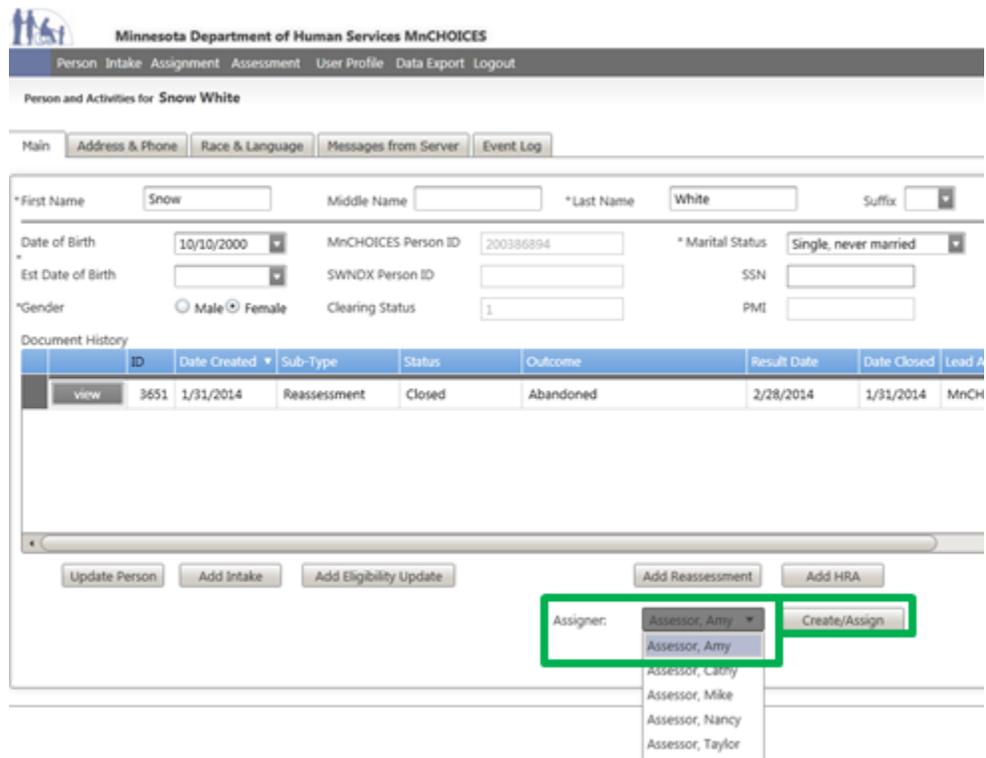
Assigner: Assessor, Cathy Assign

Comments

Assessor, Amy  
Assessor, Cathy  
 Assessor, Mike  
 Assessor, Nancy  
 Assessor, Taylor  
 HRA, Harry

**b. Add Eligibility Update, Add Reassessment and Add HRA**

- i. Select appropriate document type, listed above, and click the button
- ii. Two additional buttons will appear:
- iii. Assigner and Create/Assign
- iv. Click the Assigner button to display all assigners in your agency
- v. Select the assigner who will decide which certified assessor will be responsible to complete the assessment
- vi. Click Create/Assign



**Minnesota Department of Human Services MnCHOICES**

Person Intake Assignment Assessment User Profile Data Export Logout

Person and Activities for **Snow White**

Main Address & Phone Race & Language Messages from Server Event Log

\*First Name: Snow Middle Name: \*Last Name: White Suffix:

Date of Birth: 10/10/2000 MnCHOICES Person ID: 200386894 \*Marital Status: Single, never married

Est Date of Birth: SWNDX Person ID: SSN: \*Gender:  Male  Female Clearing Status: 1 PMI:

Document History

ID	Date Created	Sub-Type	Status	Outcome	Result Date	Date Closed	Lead A
<a href="#">view</a> 3651	1/31/2014	Reassessment	Closed	Abandoned	2/28/2014	1/31/2014	MnCH

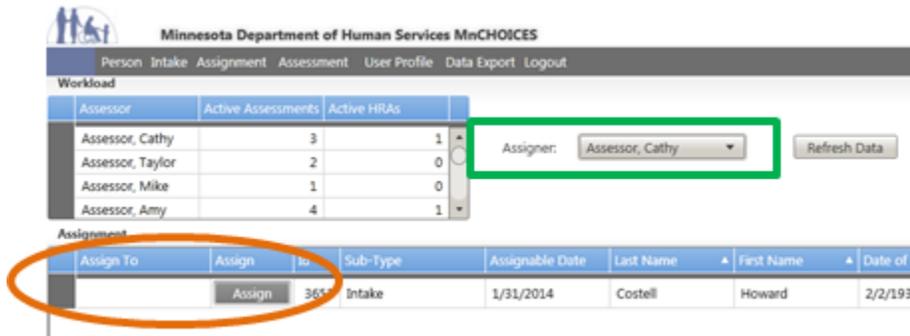
Update Person Add Intake Add Eligibility Update Add Reassessment Add HRA

Assigner: Assessor, Amy Create/Assign

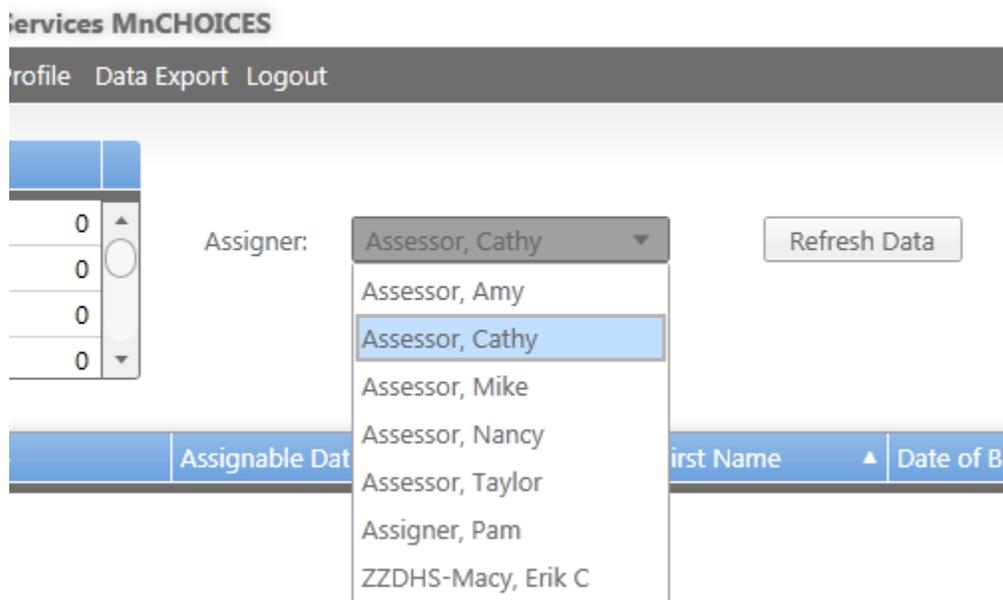
Assessor, Amy  
Assessor, Amy  
 Assessor, Cathy  
 Assessor, Mike  
 Assessor, Nancy  
 Assessor, Taylor

4. Complete Assignment

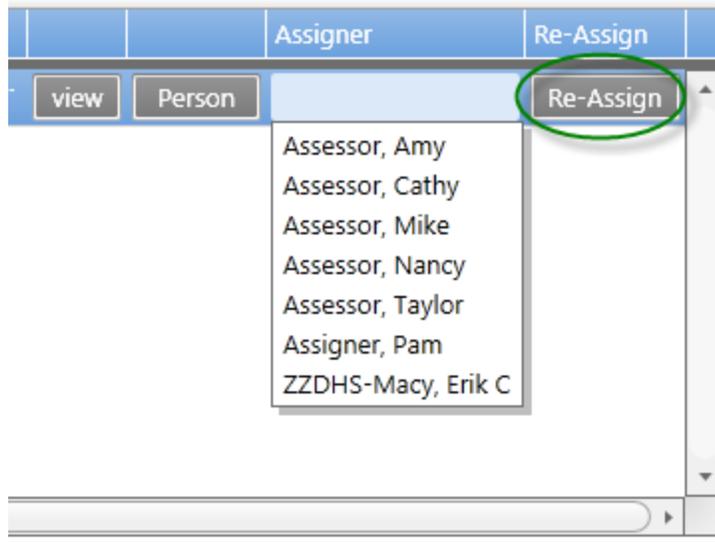
- a. Click **Assignment** on the MnCHOICES **Main Menu Bar**
- b. The document will be in the queue of the selected assigner
- c. Each assigner has their own Assignment Queue that only contains intakes/assessments which have been selected for you to assign to a certified assessor.



- d. The Assign To field in the assignment grid has been moved from the far right to the far left.
- e. Assigners can view the queue of other assigners by selecting an assigner's name from the drop-down menu.



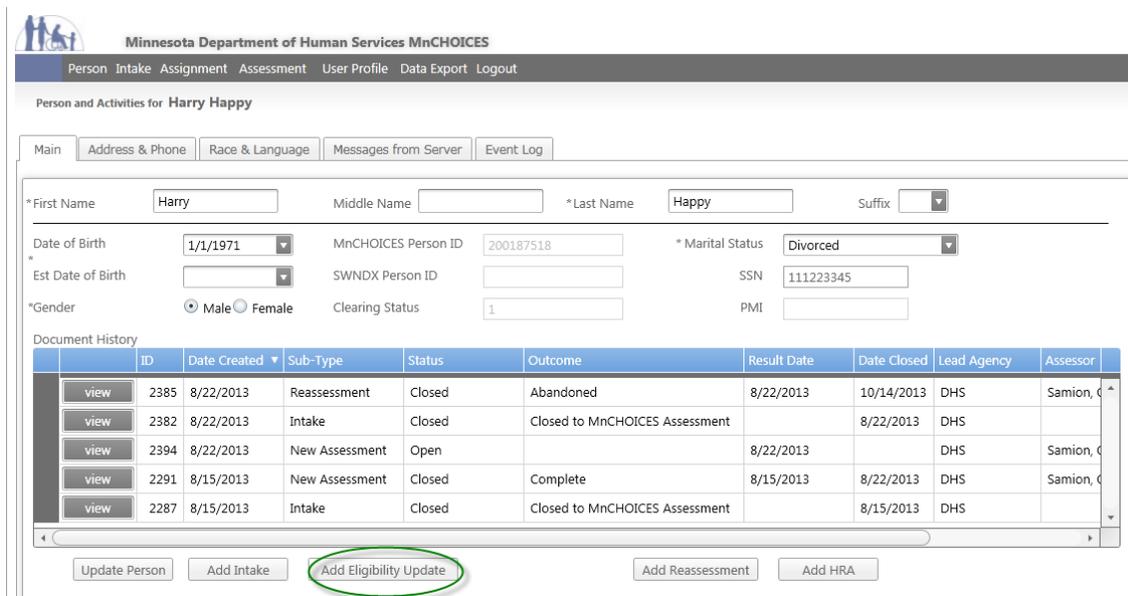
- f. By scrolling to the far right, you can also re-assign the intake/assessment to another assigner. Click on the Assigner field of the intake/assessment you want to re-assign and select the appropriate assigner from the drop down. Then click the gray Re-Assign button. The intake/assessment will move to that assigner's queue for a decision about which certified assessor will be responsible to conduct the assessment.



## Eligibility Update

The Eligibility Update is a new function to support the legislation that went into effect August, 2013 and permits, under certain circumstances, an update to eligibility determination without the need for a second face-to-face assessment. An Eligibility Update is only valid up to 90 days following a new face-to-face assessment that has been closed as complete. Please refer to [DHS Bulletin #13-25-11](#).

1. Conduct **Person Search**. Click the **Add Eligibility Update** button in the Person and Activities view.



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Person Intake Assignment Assessment User Profile Data Export Logout

Person and Activities for Harry Happy

Main Address & Phone Race & Language Messages from Server Event Log

\*First Name Harry Middle Name \*Last Name Happy Suffix

Date of Birth 1/1/1971 MnCHOICES Person ID 200187518 \* Marital Status Divorced

\* Est Date of Birth SWNDX Person ID SSN 111223345

\*Gender Male Female Clearing Status 1 PMI

Document History

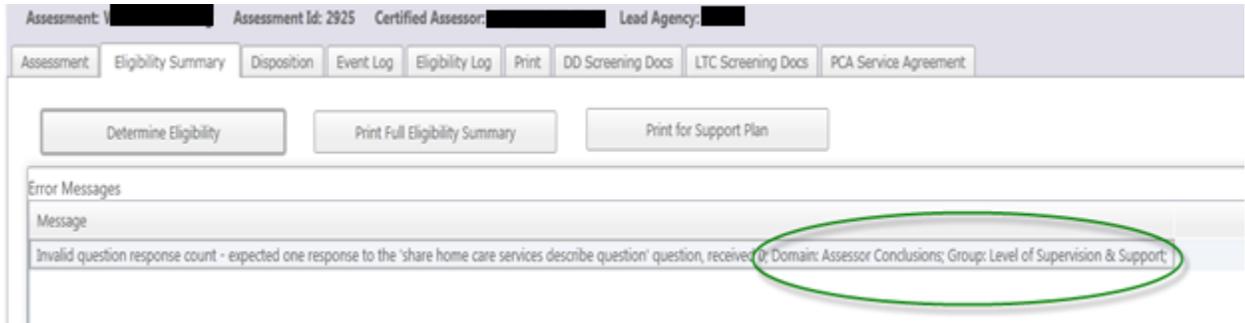
	view	ID	Date Created	Sub-Type	Status	Outcome	Result Date	Date Closed	Lead Agency	Assessor
	view	2385	8/22/2013	Reassessment	Closed	Abandoned	8/22/2013	10/14/2013	DHS	Samion, C
	view	2382	8/22/2013	Intake	Closed	Closed to MnCHOICES Assessment		8/22/2013	DHS	
	view	2394	8/22/2013	New Assessment	Open		8/22/2013		DHS	Samion, C
	view	2291	8/15/2013	New Assessment	Closed	Complete	8/15/2013	8/22/2013	DHS	Samion, C
	view	2287	8/15/2013	Intake	Closed	Closed to MnCHOICES Assessment		8/15/2013	DHS	

Update Person Add Intake **Add Eligibility Update** Add Reassessment Add HRA

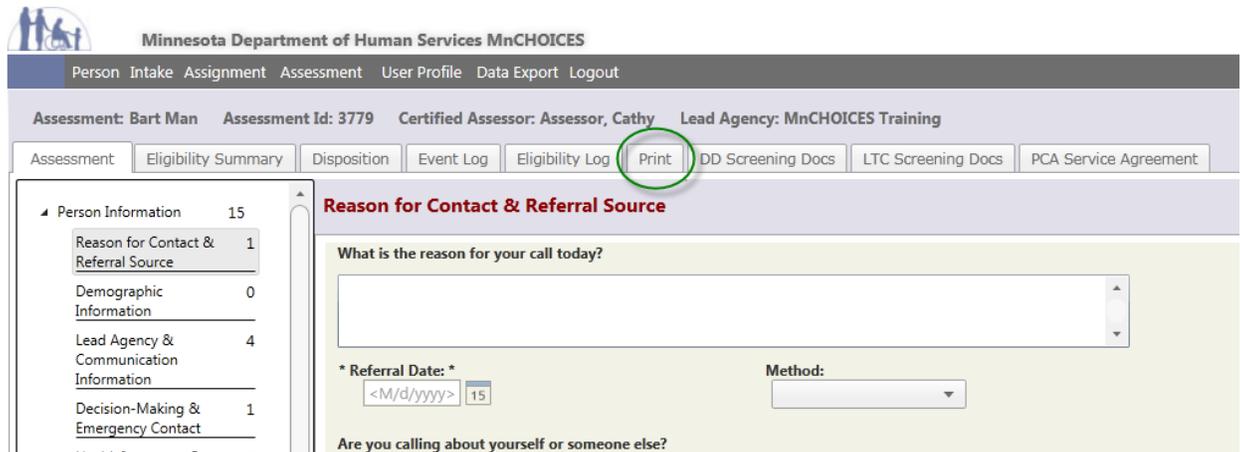
2. Conduct any necessary updates in **Person Maintenance**.
3. Select an assigner who will move the document to the appropriate certified assessor.

## Messages Showing Missing Information by Domain and Group

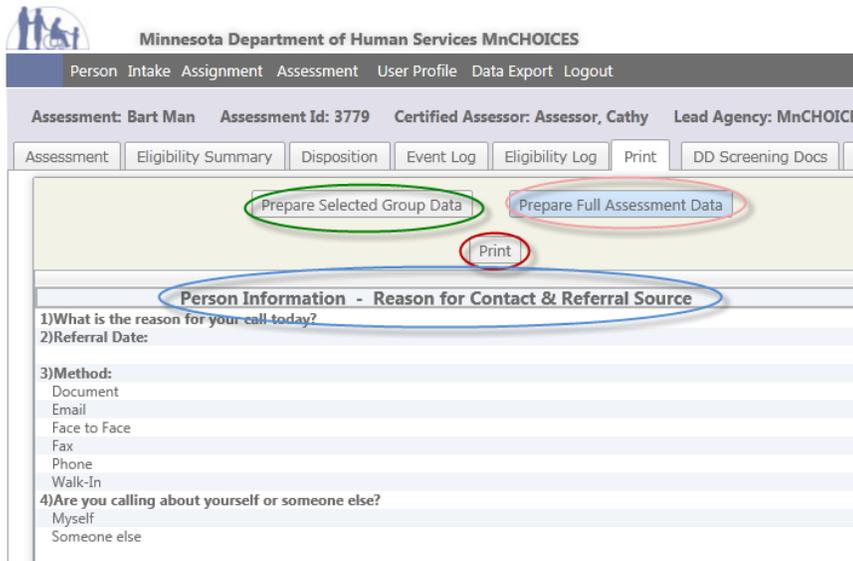
1. When using the **Eligibility Summary** function and if a question is unanswered, the **error message** now gives an indication of where to find the question connected to the error message.



2. The assessor can go back to the domain and question group indicated and review the question and answer and make any necessary additions or corrections.
3. Once any additions or change are made, the assessor clicks the **Eligibility Summary** tab and runs eligibility again by clicking **Determine Eligibility**.
1. **Printing Options for Full Assessment and Question Group** There are two options for printing the Assessment. You can:
  - 1) Print a selected Question Group including questions and documented responses.
  - 2) Print the entire Assessment including questions and documented responses.
2. Select the **Print** Tab



3. Clicking the **Prepare Selected Group Data** allows you to print only the question group you were in when you clicked the print tab. In the screenshot below, the **Reason for Contact & Referral Source** question group was selected. Click **Print** and follow the usual commands from your selected printer. Only the pages of the assessment that are part of the question group selected will print.



4. If you click the **Prepare Full Assessment Data** button you will print the entire Assessment, HRA or Intake document. It should be noted that if you print an entire assessment, the resulting document can be between 50 and 200 pages.

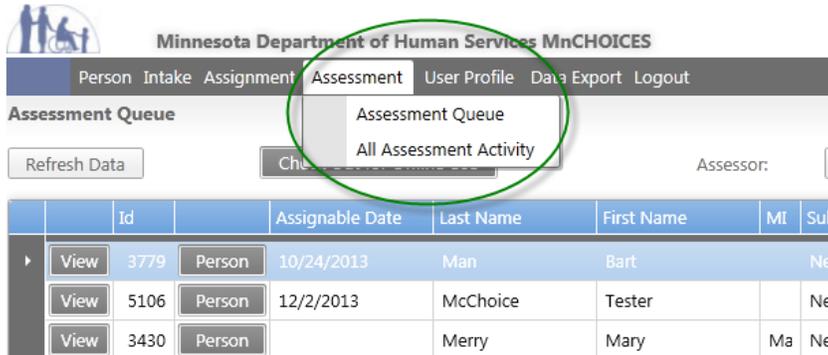
## PCA Hours Display When Eligibility Summary Shows “Not Eligible”

If the person is not eligible for Personal Care Assistance (PCA) services due to Medical Assistance (MA) status or current living arrangement, the hours of PCA services for which the person would qualify for, if they had the correct MA status and/or living arrangement, will display with a note that says **“For Informational Purposes”**

Services	Eligibility Status	Home Care Rating
Vent Dependent	Not Eligible	V
Personal Care Assistance (PCA)	Not Eligible	V
Does not meet criteria of on medical assistance or eligible for AC Met criteria of not living in PCA provider owned or controlled housing Met criteria of one or more PCA ADL dependencies and/or PCA level 1 behaviors Met criteria of planning to return or remain in community living Not eligible for PCA <b>For INFORMATIONAL PURPOSES</b> if all criteria were met Does not require a responsible party (able to direct own care) Home care rating is V and base hours/day is 4.25 (may be eligible for additional time - see below) Does not qualify for additional complex health-related needs hours Does not qualify for additional increased vulnerability due to cognitive deficits or socially unacceptable behavior hours Does not qualify for additional resistive to care/verbally aggressive hours Does not qualify for additional physical aggression hours Added 1.5 hours/day due to dependencies in 3 of 4 critical ADLs <b>Total hours/day is 5.75</b>		

## Ability to view All Assignments within Lead Agency

1. Clicking on **Assessment** on the MnCHOICES **Main Menu Bar** now provides a drop-down selector with options for **Assessment Queue** and **All Assessment Activity**.



2. Clicking on **All Assessment Activity** shows a list of all opened and closed assessments assigned to all certified assessors in your lead agency.
3. Clicking on the **grid headings** allows the user to sort and filter using different criteria. Based on the type of data in the column, there are different ways to sort the data. For example:
  - a. Hover your cursor in the column heading to see the **funnel icon** (arrow 1);
  - b. Click on the funnel to get the **filtering options** list (such as blanks, non-blanks, closed open) (arrow 2);
  - c. After selecting the filter, click on the **column header** to sort; For alpha and numeric sorting, you can choose either ascending or descending order. Hover on the column and change the direction of the **arrow** in that field (arrow 3).

