



Developmental Disabilities (DD) or Related Conditions (RC) (RULE 185) Process Guidelines with MnCHOICES

As of 2/27/15-version 1

Purpose: To outline the process for Rule 185/DD Case Management determinations with MnCHOICES.

MnCHOICES is a single, comprehensive assessment and support planning web-based application for long-term services and supports in Minnesota. It replaces three assessment tools:

- Developmental Disability Screening
- Long-Term Care Consultation
- Personal Care Assistance Assessment

In order for people to access DD services, including the DD Waiver, they must meet criteria for Rule 185/DD Case Management (CM) services. This process is completed outside of MnCHOICES by a Qualified Developmental Disabilities Professional (QDDP) who is trained in the diagnostic determination of developmental disability or related conditions (DD/RC). Therefore, with MnCHOICES, this process includes a MnCHOICES assessment by a certified assessor and a determination by a Qualified Developmental Disabilities Professional (QDDP) that the person meets diagnostic criteria of having a developmental disability or related condition.

Note: MnCHOICES Assessment process and Rule 185 eligibility determination may occur simultaneously. For example, persons may contact the lead agency to request Rule 185 services, initiating the dual path of determining DD/RC and scheduling a MnCHOICES assessment. Or, MnCHOICES certified assessors may, with the person, make a referral for a DD/RC determination while they are still completing the Community Support Plan or finalizing the assessment.

Follow this process guideline when the:

- MnCHOICES Eligibility Summary indicates pending or unknown status for Rule 185; and
- Certified assessor has informed, educated and explored with the person¹ and the benefits and limitations of Rule 185 CM services; and
- Certified assessor has informed, educated and explored with the person the benefits and limitations of other available options; and
- Person chooses to pursue Rule 185 DD CM services.

Note: *The **Guideline Document** below highlights certain aspects of the assessment and eligibility process. It is not intended to provide a complete step-by-step guide to the full assessment, eligibility and planning process.*

Document, tool, or system	Process steps for MnCHOICES
<p>The certified MnCHOICES assessor (CA) from the County of Residence, or where the person is located at the time of the assessment request, conducts the MnCHOICES assessment</p>	<ol style="list-style-type: none"> 1. Capture person’s need for habilitative and/or active treatment supports due to developmental cognitive issues or related conditions, along with other assessed needs 2. Run person’s Eligibility Summary to note “pending or unknown status for Rule 185” 3. Discuss choice to pursue Rule 185 determination 4. Complete Long Term Care (LTC) Screening Document (SD) domain 4. If applicable, complete Personal Care Assistance (PCA) Service Agreement (SA) domain 5. Re-run Eligibility to create and use the LTC SD and PCA SA 6. Close as Complete the assessment on or before 60th day
<p>Community Support Plan Worksheet [DHS-6791E in eDocs]</p>	<ul style="list-style-type: none"> • Indicate topics discussed with person • Indicate referral and follow up items such as testing, school records, supplemental evaluations, and application for social services.

¹ Person includes: the person who is being assessed plus the person’s legal representative, if any.

Document, tool, or system	Process steps for MnCHOICES
Community Support Plan (CSP) [DHS- 6791B]	<ul style="list-style-type: none"> • Complete, as guided by DHS-6791C instructions • Include goal item: “To obtain determination of eligibility for Rule 185 services,” along with other goals of person
Minnesota Medicaid Information System (MMIS)	<ul style="list-style-type: none"> • Use LTC SD document created in the assessment to enter LTC SD into MMIS reflecting current result code • Use PCA SA document created in the assessment to enter PCA SA into MMIS if applicable [reference: PCA Process Guidelines w/MnCHOICES]
Coordinated Services and Support Plan (CSSP) [DHS-6791B]	<ul style="list-style-type: none"> • Complete, as guided by DHS-6791C instructions
Application for Social Services [DHS-2140]	<ol style="list-style-type: none"> 1. Provide Application for Social Services so person can indicate intention to pursue eligibility for Rule 185 services, and to ensure fair access to eligible resources 2. If the person chooses to apply, assist with completing application for those who are unable to do so on their own 3. Submit the completed application, a copy of the person’s CSP, and MnCHOICES Eligibility Summary to the County of Financial Responsibility.
Social Services Information System (SSIS)	Enter case activity/case note regarding assessment activities as per your agency’s case noting standards

Document, tool, or system	Process steps for Determination of Rule 185 Eligibility
The County of Financial Responsibility (CFR) conducts the Determination of Rule 185 eligibility	<p><i>NOTE: Diagnostic assessments must be determined by the CFR’s designated QDDP² within 35 working days of receipt of an Application for Social Services requesting a DD eligibility determination.</i></p> <p>Upon receipt of the application:</p> <ol style="list-style-type: none"> 1. Assignment to QDDP responsible for completing the DD/RC eligibility determination process is made by lead agency. [At the Lead agency’s discretion, in situations where the CA is both a QDDP and from the CFR, the Lead agency may assign the CA to complete the Rule 185 determination.] 2. Follow your agency’s protocol for determining Rule 185 DD/RC eligibility 3. Complete appropriate forms and documentation
Notification: Not Rule 185 Eligible	<p>For people who are determined ineligible for Rule 185 services, the CFR follows current notification protocols, including a Notice of Action (NOA).</p> <ul style="list-style-type: none"> • Rule 185 eligibility results are provided to the MnCHOICES certified assessor as follow-up
Notification: Rule 185 Eligible	<p>For people who are determined eligible for Rule 185, the CFR initiates their protocol to assign a DD Case Manager</p> <ul style="list-style-type: none"> • Rule 185 eligibility results are provided to the MnCHOICES certified assessor • Notifications are sent to others as designated by the person
Social Services Information System (SSIS)	<p>Document Rule 185 results. Follow other case protocols for accurate SSIS workgroup set up and assignment.</p>

² **Qualified Developmental Disability Professional (QDDP):** Individual qualified to work as an expert with persons with developmental disability or related conditions. The QDDP has a four-year college degree in an area related to developmental disability and a minimum of one-year experience working in that field. For more information on QDDP standards, see [CFR Title 42, sec. 483.430](#).

Document, tool, or system	Process steps for Determination of Rule 185 Eligibility
CSSP [DHS-6791B]	DD case manager <ul style="list-style-type: none"> • Creates or Updates the person’s CSSP • Works with person to identify and arrange for additional services or resources now available to them

Document, tool, or system	Process steps for MnCHOICES following Rule 185 Determination	
Social Services Information System (SSIS)	COR documents Rule 185 results as provided by QDDP. Enter other case notes as warranted by your communications and assessment related activities	
Incorporating Rule 185 eligibility into MnCHOICES – CA selects appropriate scenario option 1, 2 or 3	1. Results of Rule 185 eligibility are completed and communicated to the certified assessor within 60 days of MnCHOICES assessment:	a. If assessment is still open, update with the new eligibility information from Rule 185 determination (If assessment is closed, see #2. below) b. Re-run Eligibility Summary, complete required documents, including the DD Screening document and follow normal MnCHOICES protocols c. Follow-up with person regarding eligibility results and support planning options now available to them d. Complete MnCHOICES assessment process
	2. Results of Rule 185 eligibility are not completed and communicated by the 60th day:	A. Determination is completed and communicated to the certified MnCHOICES assessor a) Update the open assessment with the new

Document, tool, or system	Process steps for MnCHOICES following Rule 185 Determination	
	<p>OPTION: To use of the Eligibility Update [EU], a phone-based assessment, between the 60th–and – 90th day from the in-person assessment. (Note: only one EU can be conducted following an in-person assessment)</p> <ul style="list-style-type: none"> • CA communicates with CFR for determination status and timeline expectations • If decision is to create an Eligibility Update document in MnCHOICES, CA conducts a phone assessment interview with person because: <p>A: CFR provided status decision; OR B: CFR anticipates providing status decision within next 60 days</p>	<p>eligibility information provided from the Rule 185 determination and the phone interview.</p> <ol style="list-style-type: none"> b) Re-run Eligibility Summary, and complete required documents, including the DD Screening document and follow normal MnCHOICES protocols c) Discuss with person any changes to the results & support planning options now available to them. d) Update CSP to reflect person’s choices and plan for services. e) Close-Complete MnCHOICES EU assessment document by the 60th day following the phone-based interview. <p>B. Determination is NOT completed during this time frame</p> <ol style="list-style-type: none"> a) Review with the person the in-person assessment responses and capture any changes or clarifications learned during the phone-based assessment interview. b) Inform person you are waiting for the Rule 185 Determination results, and convey timelines for what to expect when results are received. c) Leave MnCHOICES EU assessment document open up to 60 days in anticipation of learning Rule 185

Document, tool, or system	Process steps for MnCHOICES following Rule 185 Determination	
		<p>determination status.</p> <p>d) Close MnCHOICES EU assessment on or before 60th day based on status communication.</p>
	<p>3. Results of Rule 185 eligibility are determined and communicated after the most recent MnCHOICES assessment (either an in-person or phone-based Eligibility Update) is Closed as Complete and an Eligibility Update is not an option.</p> <p><i>NOTE: Persons accessing a DD Waiver require an in-person assessment within past 30 days of start – conduct an in-person MnCHOICES assessment</i></p>	<p>a. An in-person assessment is conducted with person and their team:</p> <ul style="list-style-type: none"> i. New assessment; or ii. Reassessment if the person is receiving a LTSS program/service that resulted from prior MnCHOICES assessment). <p>b. Follow process steps for completing a MnCHOICES assessment, incorporating results of the Rule 185 determination</p> <p>c. Run Eligibility Summary and discuss results that now reflect options made available to person due to their DD eligibility, such as DD Waiver, SILS, and DT& H services if provided by the county as a county-paid service. Discuss any changes with current services impacted by new results.</p> <p>d. Ensure person has informed choice among their updated services and support options</p> <p>e. Create MnCHOICES generated LTC SD and DD SD</p> <p>f. Close as Complete the MnCHOICES assessment on or before 60th day of the in-person visit.</p>
<p>CSP Worksheet [DHS-6791A NCR order]</p>	<ul style="list-style-type: none"> • Indicate topics discussed with person • Indicate additional referrals needed and/or follow up items 	
<p>CSP [DHS-6791B]</p>	<ul style="list-style-type: none"> • Update person’s CSP incorporating changes resulting from the updated eligibility and service planning 	

Document, tool, or system	Process steps for MnCHOICES following Rule 185 Determination
	discussion. [As needed, review DHS-6791C instructions] <ul style="list-style-type: none"> • Provide a copy to the person’s DD Case Manager for further development of the CSSP
MMIS	<ol style="list-style-type: none"> 1. Enter MnCHOICES generated LTC SD into MMIS 2. Enter MnCHOICES generated DD SD into MMIS (reference codebook as needed) 3. A PCA SA is completed if this is a new service option for the person. For people receiving PCA as a result of a previous assessment, the SA is still valid unless person is eligible for and chooses a waiver, or there is a change in the person’s PCA hours

Additional resources:

[Community Based Services Manual \(CBSM\)](#)

[DD Screening Document Codebook](#)

[Forms for LTSS Assessment, Eligibility, and Support Planning](#)

For assistance resolving issues with MnCHOICES or DD processes, first check with your:

- MnCHOICES Mentor
- Supervisor
- Members of your Multidisciplinary Team

If your agency is not able to answer your question(s), have your Mentor submit your question(s) to the SSIS/MnCHOICES Help Desk.