

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*

- ✓ Reassessment document is accessed in the CA's *Assessment Queue*

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

- LTC Screening Document (Required for all Reassessments)
- PCA Service Agreement per eligibility determination
- DD Screening Document per eligibility determination
- ✓ Close Reassessment by Selecting Appropriate Disposition
 - 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:
 - MnCHOICES *Community Support Plan (CSP) Worksheet* (DHS-6791A)
 - MnCHOICES *Community Support Plan (CSP)* (DHS-6791B)
 - MnCHOICES *Assessment Report*
 - MnCHOICES *Eligibility Summary*
 - MnCHOICES *Planning Summary*
 - MnCHOICES *PCA (Provider) Report*
- ✓ If there **is not** a CM, but person will continue to receive publicly funded LTSS:
 - 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)

Reassessment Rollout Checklist

Version 1: 7/7/15

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, CDCS budgets and other county-coordinated services
- ✓ MMIS entries per lead agency protocol