



Reassessment Rollout Guidance Document

Purpose of document: The purpose of this document is to provide guidance to counties and tribes when preparing for the rollout of conducting MnCHOICES Reassessments for persons currently receiving long term services and supports (LTSS).

A. County/Tribe Responsible for Reassessment		
Days from Service Agreement End Date	Tasks	System Or Protocol Used
<p>Approximately 100-90 days</p>	<p>Data Review</p> <ol style="list-style-type: none"> 1. Review report(s) to identify recipients needing Reassessments 2. Organize data according to lead agency’s internal process in order to complete preparatory tasks and ensure a certified assessor (CA) is assigned in a timely way 	<ul style="list-style-type: none"> • DHS Recipient List Report located in the MN-ITs Mailbox, 15th of the month • Lead agency internal lists and reports • Contracted case management lists
<p>Approximately 100-80 days</p> <p><i>To do initial entry of person into MnCHOICES prior to recipient’s first Reassessment in MnCHOICES</i></p>	<p>Create Reassessment in MnCHOICES</p> <ol style="list-style-type: none"> 1. Conduct person search in MnCHOICES <ol style="list-style-type: none"> a. If person is found in MnCHOICES, go to step #2 b. If person is not found in MnCHOICES, create person in MnCHOICES 2. When the case manager (CM) is not the certified assessor (CA) <ol style="list-style-type: none"> a. A MnCHOICES Intake needs to be created <ol style="list-style-type: none"> i. MnCHOICES Intake is used to enter information about the recipient prior to their first Reassessment in MnCHOICES ii. Use the <i>Case Manager’s Recipient Information Form</i> to provide the information to create a MnCHOICES Intake for current LTSS recipients in preparation for the first Reassessment. (NOTE: The case manager (CM) is directed to send this form to the certified assessor (CA) at least 60 days prior to the end of the service agreement) b. Select <i>Abandoned</i> Disposition to close the MnCHOICES Intake <i>Note: The Intake data will appear in the Person Information domain when the Reassessment is created and the Intake was Abandoned</i> 3. When the case manager is the certified assessor <ol style="list-style-type: none"> a. Skip step #2 above; go to Assignment of Reassessment to certified assessor below 	<ul style="list-style-type: none"> • MnCHOICES • MnCAT Step 3, Part 1 as refresher, if needed • <i>Case Manager’s Recipient Information Form</i> (an accessible version will be coming out in the near future and will be posted to CountyLink) for recipient’s first Reassessment in MnCHOICES; • available on MnCHOICES CountyLink • Lead agency communication protocol for notification of case assignments, such as email or electronic workflow system



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A. County/Tribe Responsible for Reassessment

Days from Service Agreement End Date	Tasks	System Or Protocol Used
<p>Approximately 80-70 days</p> <p><i>To provide adequate time for adjusting workloads and scheduling Reassessments</i></p>	<p>Assignment of Reassessment to Certified Assessor</p> <ol style="list-style-type: none"> 1. From the <i>Person and Activities for [person's name]</i> screen, select <i>Add Reassessment</i> 2. Select <i>Assigner</i> in dialogue box and click <i>Create/Assign</i> 3. Assigner goes to <i>Assignment Queue</i> and assigns to certified assessor 4. Person's Reassessment document is accessed in the certified assessor's <i>Assessment Queue</i> 5. Reassessment document is accessed in the CA's <i>Assessment Queue</i> 	<ul style="list-style-type: none"> • MnCHOICES • MnCAT Step 3, Part 1 as refresher, if needed

B. Certified Assessor (CA)

Days from Service Agreement End Date	Tasks	System Or Protocol Used
<p>Approximately 80-60 days</p> <p><i>This timeline is "new" for many agencies. Adjusted timelines are needed because there is a separation of CA/CM roles with MnCHOICES</i></p>	<p>Certified Assessor receives assignment(s) and prepares for Reassessment</p> <ol style="list-style-type: none"> 1. Organize workload to accommodate Reassessment(s) 2. Review summary of information provided by case manager, found in MnCHOICES Person Information domain, including: <ul style="list-style-type: none"> • 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 • Is the person considered an accurate self-reporter • Consult with CM if additional clarification or information is needed 3. Review person's plan(s), e.g., CSP, CSSP, ISP, etc. 4. Review previous LTSS assessment(s), e.g., LTCC, DD Screening , and/or PCA Assessment <p>Recommendation: Certified assessor and case manager work in partnership.</p>	<ul style="list-style-type: none"> • MnCHOICES certified assessor's <i>Assessment Queue</i> • MMIS • SSIS • MnCHOICES • Lead agency's records system(s) • Non-electronic documents



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B. Certified Assessor (CA)		
Days from Service Agreement End Date	Tasks	System Or Protocol Used
Approximately 70-40 days	<p>Schedule Reassessment</p> <ol style="list-style-type: none"> 1. Follow lead agency protocol for scheduling appointments, obtaining interpreters, etc. 2. In <i>Assessment Queue</i>, enter the date of Reassessment in the <i>Assessment Date</i> column. Enter the first day of the next service agreement span in the <i>Result Date</i> column 3. Coordinate with case manager, as needed per person’s situation 4. Inform case manager of Reassessment date, time and location 	<ul style="list-style-type: none"> • Phone, secure email, etc. • Lead agency’s scheduling protocols
Approximately 60-30 days	<p>Conduct Reassessment</p> <ol style="list-style-type: none"> 1. Face-to-face interview 2. Document what is reported, observed and reviewed 3. Use professional judgement 4. Run eligibility 5. Discuss options with the person 6. Prior to closing the Reassessment, CA contacts the CM when: <ul style="list-style-type: none"> • The MnCHOICES <i>Eligibility Summary</i> and factors affecting the Reassessment results indicate changes in eligibility or the resources available, e.g., budgets; and/or • The MnCHOICES <i>Eligibility Summary</i> indicates the person is ineligible for a service/program they requested; and/or • The person chooses different program/service options 	<ul style="list-style-type: none"> • MnCHOICES • MMIS • Phone • Secure email



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B. Certified Assessor (CA)		
Days from Service Agreement End Date	Tasks	System Or Protocol Used
<p style="text-align: center;">Approximately 30 days</p> <p><i>This provides adequate time for the case manager to complete follow up work related to reestablishing the person's support plan</i></p>	<p>Finalize the Reassessment and Complete Required Documents</p> <ol style="list-style-type: none"> 1. Contact case manager, as needed or agreed to from previous communications 2. Complete and provide Community Support Plan (CSP) to person/legal representative, CM, and others, as appropriate prior to closing 3. Complete <i>Lead Agency Case Manager/Worker Communication Form</i> (DHS-5181), as needed and give to case manager. Case manager submits document to the financial worker 4. Complete Notice of Action (NOA), as discussed with CM/CFR and send to person 5. Enter data into MMIS per lead agency protocol: <ul style="list-style-type: none"> • LTC Screening Document (required for all Reassessments) • PCA Service Agreement per eligibility determination • DD Screening Document per eligibility determination <p>Note: For persons receiving CDCS under a disability waiver, the LTC Screening Document/DD Screening Document and the Service Agreement must be entered 35-60 days prior to the beginning of the next service agreement to assure entry into the Waiver Management System download.</p> <ol style="list-style-type: none"> 6. Close Reassessment by selecting appropriate disposition 7. If the CA is the CM, all Reassessment information is available in MnCHOICES 8. If the CA is not the CM, the CA provides the following information to the CM: <ul style="list-style-type: none"> • 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 <p>If there is not a CM but person will continue to receive publicly funded LTSS</p> <ul style="list-style-type: none"> • CA completes the CSSP, PCA Service Agreement, PCA (Provider) Report and other documents as needed for the person to receive services as outlined in their CSP 	<ul style="list-style-type: none"> • MnCHOICES • DHS – 6791B, Support Plan • DHS – 5181, Communication form • DHS – 2828, Notice of Action • Lead agency support tool, e.g., checklist • MMIS

C. Case Manager (CM)		
Days from Service Agreement End Date	Tasks	System Or Protocol Used
<p>Approximately</p> <p>3-6 months before the Reassessment</p> <p><i>Conversations with recipient to address changes in assessment protocols, if needed</i></p>	<p>In certain situations, where a person is accustomed to the case manager performing the annual assessment, the case manager should inform the person/legal representative that another professional will be conducting the Reassessment. The case manager is encouraged to provide information to the person regarding:</p> <ul style="list-style-type: none"> Information about the comprehensive assessment, e.g., completed on a computer, person-centered, evaluation for all of the programs, eligibility rules are built into the tool, everyone is evaluated with the same criteria, etc. The CA role (eligibility) versus CM role (support planning); reassures person that CA is from same system; all work for State of Minnesota through county/tribe; working together on behalf of person The process such as, “The CA will call to schedule the assessment visit”; “I will have an opportunity to discuss your needs (or provide input) with the assessor.” Length of time for the assessment varies based on the person, the assessor, and the thoroughness of the interview. 	<ul style="list-style-type: none"> During CM visits, and/or Via phone conversation, and/or Via reminder letter, and/or standardized letter created by the case manager’s lead agency
<p>At least</p> <p>60 days</p>	<p>Case Manager provides to Certified Assessor</p> <ul style="list-style-type: none"> Current support plan, e.g., CSP, CSSP, ISP, etc. Most recent LTSS assessment, e.g., LTCC, DD Screening, PCA Assessment Rule 185/DD Case Management eligibility information <i>Case Manager’s Recipient Information Form</i>, which includes the following information: <ul style="list-style-type: none"> Known issues with contacting the person to schedule a visit Known changes in person’s situations since Reassessment process was initiated Any safety issues for the CA Special accommodations needed by the person Information to support an accurate assessment of the person’s needs, situation, including person’s ability to self-report Information for OBRA completion, as needed 	<ul style="list-style-type: none"> <i>Case manager’s Recipient Information Form</i> for person’s Reassessment available on MnCHOICES County Link US mail Secure email Via MnCHOICES Interagency Contact Point

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C. Case Manager (CM)		
	Recommendation: Certified assessor and case manager work in partnership.	
Days from Service Agreement End Date	Tasks	System Or Protocol Used
Prior to scheduled Reassessment to allow for sufficient time for input	<p>Inform providers of opportunity to provide input prior to Reassessment</p> <ul style="list-style-type: none"> • Communicate the anticipated Reassessment date with direct service providers per person’s request • Instruct providers how to submit notes for the CA’s consideration prior to Reassessment 	<ul style="list-style-type: none"> • MN Statute 256B.0911, Subd 3a, (d) • Phone • US mail • Secure email
As needed, throughout the process	<p>Communicate with Certified Assessor</p> <ul style="list-style-type: none"> • Throughout the Reassessment process to support partnership on behalf of the person 	<ul style="list-style-type: none"> • Phone • Secure email • In person
No later than start of new Service Agreement span	<p>Complete the Coordinated Services & Supports Plan (CSSP)</p> <ul style="list-style-type: none"> • Receive completed assessment information and CSP from CA • Review CSP with person • Create and finalize Coordinated Services and Support Plan (CSSP) with person 	<ul style="list-style-type: none"> • CSSP DHS-6791B • Visit protocol • Reassessment checklist, available on MnCHOICES CountyLink
By the first day of new Service Agreement	<p>Complete other tasks as required or needed</p> <ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • SSIS • CL tool • Lead agency waiver finance • MMIS • Internal protocols for lead agency services • Notice of Action DHS – 2828