Review of Non-IDD Support Planning Assessment Workflow

March 2015 Case Management Workgroup Meeting

HCBS Strategies

March 2015

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Core Design Features

- Separate Participant Record for administrative information

- Start with conversation about purpose of assessment

- Before proceeding with full assessment:
  - Verify correct people are present (substitute decision-makers)
  - Verify individual meets eligibility criteria

- Start full-assessment with person-centered components

- Flow of rest of assessment depends upon conversation

Introduction to the Assessment

- Explain purposes

- Explain how some items are mandatory and some can be opted out

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Eligibility Verification

- Can be used to collect all of the mandatory items - or

- Can collect sufficient information to determine if person is eligible (i.e., stop once participant has met one criterion)

  - Then complete rest of the items as part of the main assessment

- Propose to have items also in relevant sections of main assessment (e.g., ADL, Cognition, behavior)

  - Information would auto-populate forward (if IT allows)

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Introduction to Person-centered Module

- Training on use of PHR and set up user access

- Begin filling out information with participant

- Participant can choose to:

  - Fill out some or all as part of the assessment

  - Fill out some or all on his/her own outside of the assessment

  - Not participate in this part of the assessment

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Primary Assessment Flow

- Envision order of sections will change based upon the flow of the conversation

- Automation should:

  - Allow assessors to jump between modules used a tab or similar function

  - Quickly identify where mandatory items need to be completed

Adaptations to MnCHOICES

- Use MnCHOICES modules as the core of the tool
- Major changes include:
  - Incorporation of CARE items
  - Overhauls of self-direction and employment modules
  - Adding new sections based on stakeholder input:
    - Housing affordability (and enhanced items on accessibility)
    - Self-advocacy
    - Literacy and Comprehension
  - Grouped employment, self-direction, self-advocacy, and literacy into "Empowerment" module

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What Should We Change?

- Domains to remove/add?

- Changes to order?

- Does the proposed staging of the eligibility determination make sense? Is it necessary?

- Others?