



Legislative Report

MnCHOICES Benchmarks

Disability Services Division

February 2020

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I. Executive summary

This report provides information about the process the Department of Human Services is using to develop a set of measurable benchmarks for lead agencies responsible for conducting long-term consultation services. The intended outcome of the project is to identify further efficiencies in the assessment and eligibility-determination process, an end-to-end process that not only determines eligibility for home and community-based services, but also:

- Allows for discovery of the person's goals, interests and preferences
- Captures important data for ongoing service planning and evaluation
- Allows for calculation of service rates
- Gathers feedback from people about their experience with long-term services and supports.

The report includes a summary of the process of assessment and eligibility determination for LTSS, an overview of changes that have been made to create efficiencies, as well as the development of the revision of MnCHOICES, previously referred to as MnCHOICES 2.0. The report also provides an overview of a project with the DHS Office of Continuous Improvement to identify potential opportunities for process efficiencies (benchmarks) and conclusions about next steps and plans for ongoing reporting of data.

Overview of assessment and eligibility process

The MnCHOICES Assessment and Support Plan applications are part of a large, multiyear, transformational effort by DHS to modernize long-term services and supports for people with disabilities and older adults in Minnesota. DHS had several reasons to update the long-term services and supports assessment process, including:

- Eliminating the need for multiple assessments for people to access appropriate supports and services
- Supporting a person-centered approach in assessment and support planning
- Providing better access to assessment data for programmatic and budgetary decisions.

When MnCHOICES first launched with lead agencies in 2013, there was a significant learning curve involved with completing assessments in a web-based application instead of using legacy paper assessments. The in-person assessment interview, however, is just one component of many that make up the process for determining eligibility for long-term services and supports. Lead agency assessors report that 1.5 to 2 hours for this step is most typical. Most steps involved in the eligibility process for LTSS have not changed with the transition to MnCHOICES.

Current status

DHS has been in a continuous cycle of evaluation and process improvement since the launch of MnCHOICES. DHS, in collaboration with lead agencies, has continued to create efficiencies in the MnCHOICES assessment process for lead agencies and people who receive assessments. Lessons DHS has learned along the way are being incorporated into the next iteration of the Assessment. DHS has started an RFP process to seek new vendors and technology solutions that might better meet the needs of MnCHOICES users. While we continue to work in the current MnCHOICES system until we launch the revision, Minnesota IT Services (MNIT) is working on enhancements and regular releases to improve the current system.

Benchmarks continuous improvement project

To identify opportunities for additional process efficiencies (benchmarks) in the MnCHOICES assessment and eligibility process, DHS is working with its Office of Continuous Improvement on a collaborative project with lead agencies. The DHS Office of Continuous Improvement is made up of dedicated experts who lead and support continuous improvement efforts across the agency. The objectives of the continuous improvement project are to:

- Identify potential opportunities for performance measures (benchmarks)
- Collect data
- Complete an initial analysis of data by April 2020.

DHS will collaborate with lead agencies throughout this project to identify benchmarks and process improvements.

Conclusions

The MnCHOICES Assessment and Support Plan applications benefit the person by providing access to a single, comprehensive assessment and support plan that utilizes a holistic discovery of the person rather than focusing only on the health and safety aspects of a person's life. DHS is committed to ongoing work to create efficiencies in the assessment and eligibility process for LTSS. This work will continue in collaboration with lead agencies, the Minnesota Association of County Social Services Administrators, the Local Public Health Association, the Association of Minnesota Counties and the longstanding County-State Workgroup.

Our redesign of the MnCHOICES assessment and support planning tool will address many of the issues that have been identified, increase efficiencies and improve the experience for both the person and the assessor. Improvements to the financial eligibility processes would also be a big step in streamlining the process; DHS has convened a stakeholder work group of county and advocacy groups to recommend improvements to the enrollment and renewal processes for the TEFRA option. Because

the enrollment and renewal processes for the TEFRA option are similar to those for people requesting home and community based services, changes recommended by this group will also serve to inform improvements for people enrolled in the home and community-based services waiver programs.

The assessment and eligibility process for LTSS is an end-to-end process that includes approximately 50 steps from start to finish. Many of these steps are supporting activities that have always been a part of the LTSS assessment and eligibility process, even with the use of legacy assessment tools. In order to identify potential process efficiencies in the assessment and eligibility process, DHS is working with its Office of Continuous Improvement on a collaborative project with lead agencies. At the time of this report, DHS is working to implement a data-collection method with plans to complete initial analysis of data by April 2020. DHS will report progress and data to the Legislature via annual reports.

II. Legislation

Minnesota Laws 2019, First Special Session, article 5, section 47 requires the Department of Human Services to submit a report to the legislature:

(c) The commissioner shall work with lead agencies responsible for conducting long-term consultation services to develop a set of measurable benchmarks sufficient to demonstrate quarterly improvement in the average time per assessment and other mutually agreed upon measures of increasing efficiency. The commissioner shall collect data on these benchmarks and provide to the lead agencies and the chairs and ranking minority members of the legislative committees with jurisdiction over human services an annual trend analysis of the data in order to demonstrate the commissioner's compliance with the requirements of this subdivision.

III. Introduction

This report reviews the process of developing a set of measurable benchmarks to create efficiencies in county functions relating to MnCHOICES assessment and support planning, as required by Minnesota Laws 2019, Special Session, article 5, section 47.

The report includes the following four sections:

- MnCHOICES background: Overview of the MnCHOICES assessment and eligibility process
- Current status: Overview of policy, program and technical changes made to create efficiencies and development of the revision of MnCHOICES (previously referred to as MnCHOICES 2.0)
- Benchmarks: Overview of the current project with the DHS Office of Continuous Improvement to identify opportunities for process efficiencies (benchmarks), implement a data-collection method and complete initial analysis of data
- Conclusion: Next steps for benchmarks project and ongoing reporting of data.

IV. MnCHOICES background

MnCHOICES is a web-based comprehensive assessment and data-collection application that was first launched on Nov. 4, 2013. The implementation of MnCHOICES is a large, multiyear, transformational effort for the state of Minnesota. It is a system wide adaptive change to create an electronic infrastructure that not only determines eligibility more efficiently and accurately but also collects data to be used for ongoing planning and evaluation at the local and federal level. It integrates support planning, rate setting and a feedback mechanism. The electronic infrastructure of MnCHOICES sets the foundation for future reforms to LTSS, including alternative payment strategies and resource allocation (for example, individualized budgeting).

MnCHOICES replaces three separate assessment tools – the Developmental Disability Screening, Long-Term Care Consultation and Personal Care Assistance Assessment – with one comprehensive assessment. These three assessments are often referred to as legacy documents. Legacy assessments were fragmented, duplicative and inefficient for the person to get access to the right services. For example, before MnCHOICES the process could have involved three separate assessments and, in some cases, three separate visits by different people to determine appropriate eligibility. MnCHOICES takes a person-centered approach with a focus on discovery of the person’s goals, interests and preferences and not just health and safety matters. It allows people to make informed choices on all aspects of their lives. For the MnCHOICES assessment, DHS took the same eligibility questions and rules from legacy assessments and transitioned them into an electronic system. This was an intentional decision as these eligibility questions had previously undergone extensive validity testing, which was performed on the items in the LTCC that drive assessment results and place people into categories of need. These categories were initially developed for nursing homes. This testing was done within the nursing home setting. Those assessment eligibility items were then brought into the legacy LTCC and used with a community-based population that has similar needs. Use of these eligibility questions and rules allows time for data analysis and additional testing of consolidated questions that will alleviate redundancy. The next iteration of the assessment will include further consolidation of questions but does not result in inadvertent changes to how categories of need eligibility established.

The MnCHOICES application also includes support planning, rates for services and an evaluation tool. DHS uses the LTSS Improvement Tool to gather feedback from people who receive long-term services and supports. This feedback helps DHS standardize measurements of quality and outcomes for people. It also allows DHS to measure how well our services help to achieve outcomes that are important to people. DHS and lead agencies are able to identify system and program wide opportunities to improve services and provide individual remediation when needed.

The MnCHOICES Assessment and Support Plan benefit the person by providing access to a single, comprehensive assessment and support plan that paints a picture of the whole person rather than focusing only on the health and safety aspects of a person's life.

Below are some additional ways that MnCHOICES benefits people and families:

- Ensuring a person-centered approach by tailoring services to a person's needs, values and priorities in the context of their local communities
- Increasing understanding of service options so people can make informed choices about what matters to them, such as work or where to live
- Promoting equity across populations and geographic areas
- Providing access to programs and services in a consistent, coordinated and timely manner.

Steps involved in the MnCHOICES process

The assessment and eligibility-determination process includes more than an interview with the person. It is an end-to-end process that includes significant time communicating with the person, preparing information for the interview on the front end, coordinating with the case manager, consulting with other professionals about support planning, documenting eligibility, coordinating service with financial eligibility and making referrals throughout the process. Assessors spend most of their time on these supporting activities. These supporting activities have always been a part of the LTSS assessment and eligibility process, even with the use of legacy assessment tools.

Minnesota uses time studies to capture these assessment and eligibility-determination process activities. Time studies are Minnesota's federally approved method of allocating local administrative costs to federal programs, including but not limited to Medical Assistance. DHS bases the allocation on a random moment sampling of social services and public health staff. The results provide a basis for estimated time spent in activities related to Medicaid, non-Medicaid and general administrative activities. Before implementation of the random moment time study payment methodology in 2013, however, providers were not reimbursed in the same way. The random moment time study consolidated multiple payment methodologies to reflect the shift from stand-alone assessments for each program/service to a unified assessment process and to ensure that federal match is claimed appropriately.

The Reform 2020 initiative was also a driver in the implementation of the random moment time study payment methodology. Reform 2020 is a set of broader reform initiatives to promote independence, increase community integration and reduce reliance on institutional care for Minnesota's older adults and people with disabilities. Part of these reform efforts was the recognition that the assessment and eligibility process is not exclusively the in-person assessment but rather includes an array of activities. DHS determined that in order to improve navigation throughout the process and ensure access to the right services at the right time, the assessment and eligibility process should be reimbursed more

holistically, including all related activities. Because DHS introduced the random moment time study payment methodology around the same time as the launch of MnCHOICES, a common misconception is that these supporting activities were unique to the MnCHOICES assessment.

In October 2019, the DHS Office of Continuous Improvement led a process mapping with 11 lead agency assessors and two MnCHOICES subject matter experts. DHS selected the lead agency representatives through a formal appointment-request process. DHS solicited county participation from the Minnesota Association of County Social Service Administrators and included representation from the Local Public Health Association of Minnesota. The goal of the process mapping was to:

- Demonstrate visually how the assessment and eligibility process currently happens
- Display the flow of the work process
- Identify how many people/roles are a part of the assessment and eligibility process
- Help to identify where there are unnecessary steps, rework or confusion in the process.

The process mapping project identified approximately 49 steps involved in the end-to-end assessment and eligibility process. Some key learnings of the process mapping project include:

- The in-person MnCHOICES Assessment interview is one component of many that make up the process for determining eligibility for long-term services and supports.
- Time spent in the in-person interview portion of the initial assessment and eligibility process ranges from 1.5 hours to 3 hours. Lead agency assessors report that 1.5 to 2 hours is most typical.
- There is variation in time and steps involved from initial assessments to reassessments, with reassessments typically involving less time.
- There are variations in county processes that contribute to the number of steps and time involved in determining eligibility for long-term services and supports.
- Many of the pain points identified in the process were related to steps required to determine eligibility that are outside of the actual MnCHOICES assessment, for example:
 - Wait time and ongoing follow-up related to determination of financial eligibility. For example, it can take up to 30 days to receive necessary financial eligibility paperwork.
 - Obtaining necessary medical documentation and diagnostic information.

In addition to providing a visual demonstration of the workflow and timeline, mapping the end-to-end assessment process provided the foundation for identifying and selecting appropriate benchmarks for the process. The process map highlighted key process “customers” (stakeholders) and “activities” that, in turn, help identify potential benchmarks using the results-based accountability framework for performance measurement.

V. Current status

DHS has been in a continuous cycle of evaluation and process improvement in collaboration with lead agencies, which has resulted in efficiencies, additional training and guidance to counties, and development of the next iteration of the assessment based on what we learned (for which we have started an RFP process). There has been a learning curve that is leveling out and the outcomes are promising.

Since the launch of MnCHOICES in 2014, the percentage of assessments lead agencies (counties and tribal nations) have completed on legacy forms has decreased significantly. Most agencies have reported that they are fully implemented in MnCHOICES. DHS has allowed the option to use legacy assessments as an interim alternative to ensure timely reassessments for people when an agency is working to build assessor capacity. In those cases, lead agencies may use case managers or nurses to assist with conducting reassessments temporarily. The chart below shows the progression of the use of MnCHOICES by counties and tribal nations.

Table 1: Percent of assessments completed via MnCHOICES or legacy by state fiscal year

State fiscal year	MnCHOICES	Legacy
2014	6%	94%
2015	27%	73%
2016	52%	48%
2017	70%	30%
2018	74%	26%

Efficiencies completed or in progress

DHS has continued work to create efficiencies in the MnCHOICES assessment process for lead agencies and for people who receive assessments. This work has been done collaboratively with lead agencies, the Minnesota Association of County Social Services Administrators, the Local Public Health Association, the Association of Minnesota Counties and the longstanding County-State Workgroup. The

goal of this work is to streamline the assessment process to shorten overall assessment and eligibility determination time and to reduce the number of assessments that might be required while maintaining a person-centered process that:

- Reflects state and federal policy
- Supports informed choice
- Assures services are adjusted to a person's changing needs.

DHS has made progress in a number of areas, including policy and process changes, system changes and training for lead agency assessors. DHS has reduced the number of required questions in the assessment and has reorganized the assessment for a more conversational interview to promote shorter in-person assessment times. In conjunction with these changes, DHS has trained lead agencies in how to conduct more effective interviews.

DHS is implementing policy and programmatic changes that will reduce the number of multiple in-person assessments a person requires in one year by removing the requirement for an in-person assessment when changes occur before the annual reassessment. A review of CY2018 data has shown that this change would result in a decrease in in-person assessments of approximately 13% statewide. In addition to this policy change, DHS has made a number of other policy changes affecting the Developmental Disabilities Waiver in the past year to contribute to increased efficiency in the assessment process. Some examples include:

- Allowing case managers to enter a guardianship status change as an administrative action instead of requiring an in-person visit. (In FY 2017, there were 806 in-person assessments because of a guardianship status change.)
- Removal of the requirement for an in-person visit after a change in County of Financial Responsibility (CFR) for DD Waiver services. This supports alignment with other LTSS programs.
- Allowing an eligibility update assessment interview by phone for updating eligibility status for people opening to the DD Waiver. This supports alignment with other LTSS programs.

While we continue to work in the current MnCHOICES system until the revision is launched, MNIT is working on enhancements and regular releases to improve the current system. This includes server upgrades to ensure stability, improve performance and to upgrade to supported versions of software. MNIT will develop software enhancements to improve end user response times, improve the reliability of offline assessments when they are brought online and to improve workflow processes to enhance the user experience.

For more detailed information on efficiencies completed, see the January 2019 legislative report on the MnCHOICES random moment time study evaluation:

<https://edocs.dhs.state.mn.us/lfserver/Public/DHS-7816A-ENG>

MnCHOICES Revision

The current version of MnCHOICES will lose vendor support for software critical to the application (Microsoft Silverlight). Updating the application to address that loss provides an opportunity to address other technology and business needs:

- Greater support for person-centered assessment and practice
- Elimination of duplicate/repetitive questions
- Shorter assessment times
- Data issues that are causing rework and a lack of trust in the system
- Delay in launching the MnCHOICES tool with managed care organizations because of a variety of technology and business issues, including instability and the lack of suitable role-based security/access permissions
- Alleviation of disruption of work schedules
- Less delay in access to services
- More efficient intake process
- Access to information (reports)
- Need for reassessment workflow support
- Business content management capability
- Versioning ability
- Improved application response times.

DHS began the design of the MnCHOICES revision by conducting a statewide business process review with lead agencies. DHS continues to involve lead agencies in the development of the revision. A lead agency planning team consisting of county, managed care organization and tribal nation members has assisted with the development of the revision, including the development of a built-in guidance manual. The guidance manual will provide real-time assistance for assessors, resulting in increased consistency and standardization.

As a part of the revision process, MnCHOICES and MNIT teams have collected requirements in a request for proposal that was publicly posted on Dec. 5, 2019, titled the Assessment and Support Planning System for Long Term Services and Supports Professionals. The RFP outlines the request to receive proposals from qualified responders to deliver a user-friendly assessment and support-planning system for long term services and supports professionals. Responses are due Jan. 31, 2020. DHS will have more information about vendors that can provide technology and service solutions once we review the RFP proposals. The criteria to be used in the evaluation process to select a vendor are statement of understanding, proposed work plan, cost, vendor financial stability, relevant responder experience, accessibility, vendor presentations and responsiveness to DHS needs.

In order to ensure accuracy and effectiveness through the transition to the MnCHOICES revision, DHS worked with a contractor to conduct inter-rater reliability and validity testing of the proposed revised content. The contractor conducted field testing, comparing the proposed revised MnCHOICES assessment results to the current assessment and provided recommendations for modifications of the revised content. We will conduct additional rounds of validity testing before and after the launch of the MnCHOICES revision, followed by annual validity and reliability testing.

VI. Benchmarks

Minnesota Law 2019, First Special Session, article 5, section 47 requires DHS to work with lead agencies responsible for conducting long-term consultation services to develop a set of measurable benchmarks sufficient to demonstrate quarterly improvement in the average time per assessment and other mutually agreed upon measures of increasing efficiency.

At the time this law was enacted, DHS did not have the necessary data to set a baseline and measure appropriate benchmarks. DHS determined the first step in this process was to collaborate with lead agencies to obtain this preliminary data.

DHS began working with the DHS Office of Continuous Improvement in July 2019 to complete this work. The Office of Continuous Improvement is made up of dedicated experts who lead and support continuous improvement efforts across the agency. The objective of the project is to identify performance measures (benchmarks), collect and complete an initial analysis of data by April 2020. DHS will be working collaboratively with lead agencies throughout this project to identify benchmarks and process improvements. This collaboration began with the process mapping project (described in Section IV A of this report.) The timelines/milestones for this project are outlined in the figure below.

Figure 2: Timelines/milestones for MnCHOICES benchmarks continuous improvement project



The process for determining the specific benchmark measures and process improvements began with mapping the assessment and eligibility process. Next, DHS and its Office of Continuous Improvement identified the customers (stakeholders) of the process, their need, and the elements that are critical to quality (see Table 2 below).

Table 2: Assessment and eligibility process customers, needs and quality elements

Stakeholders	What do our stakeholders need?	Elements critical to quality
Assessors/lead agencies	Completed assessment, financial eligibility determination, supporting documentation from doctors (and other service providers), admin/technical support, up-to-date policy and assessment changes communicated clearly, appropriate staffing and training, reliable technology, financial resources	The in- person assessment interview is completed efficiently; time spent is dependent on a person’s individual needs and preferences
Person/individual	Simplified process (now bogged down by complicated forms), assistance with daily living/benefits	Receive timely access to assessments and eligibility determinations. Receive CSP/CSSP within 60 days of assessment.
Providers	Documentation from assessment to develop plan of care	Clear and accurate documentation before services start or are renewed

The next step in the continuous improvement process was to identify potential performance measures and to rate the potential measures based on key criteria. This process was based on the results based accountability framework and helped DHS and project partners identify which performance measures were the strongest indicators of performance and the most realistic to capture.

Once the measures were rated using the results based accountability framework, DHS engaged lead agency partners to solicit feedback on which measures they found most useful, their preferred method of tracking data and other related items. Lead agencies gave feedback via a survey sent to all lead agency supervisors. Based on survey response, the mutually agreed upon benchmarks include the following:

1. Number of people assessed
2. Average minimum/maximum time from in-person assessment to final paperwork mailed to person
3. Number of times the assessment and eligibility determination process exceeds 60 days
4. Time it takes to do an in-person interview
 - a. Initial assessment
 - b. Reassessment
5. Number of people with multiple assessments during a calendar year
6. Number of days waiting on financial eligibility determination

Lead agencies identified additional measures as important for measurement, but because of the level of effort needed to collect this data, DHS and lead agencies determined that it was not feasible to track all of the measures at this time. Because statewide measurement was not feasible, DHS is considering other options, such as implementing a future pilot with select lead agencies to track additional measures.

In order to capture data on “time it takes to do an in-person interview” (number four in benchmark list above), DHS had to implement a data-collection method. In making a decision on the most appropriate mechanism for data collection, DHS determined the method of tracking data must be:

- Consistent; data is needed on all completed assessments
- Reliable
- Set up for long-term reporting
- Designed to allow for data analysis on a regular basis
- Practical for assessors to use.

Based on these requirements, DHS decided this information would be tracked in the MnCHOICES Assessment application. This update will be added to the application in March 2020, allowing for adequate time for development work and testing in the application. To prepare lead agencies for the addition of this newly required assessment field, DHS will develop a training and communication plan to ensure all assessors statewide have a shared understanding of the benchmark measure and how to track the in-person interview time accurately and consistently.

VII. Conclusion

The MnCHOICES Assessment and Support Plan applications are part of a large, multiyear, transformational effort by DHS to modernize long-term services and supports for people with disabilities and older adults in Minnesota. Through these early rollout years, DHS has been learning along with our partners about the MnCHOICES assessment and eligibility process, and all the steps it entails, including external factors such as eligibility determination. As a result, DHS has worked (and continues to work) with lead agencies to create efficiencies for assessors and people who receive assessments. The goal of this work is to streamline the assessment process and reduce the number of in-person assessments while maintaining a person-centered process and informed choice, and ensuring services adjust to a person's changing needs.

DHS is working on a revision of the MnCHOICES application that will create further efficiencies in the assessment and eligibility process. The purpose of the redesign is to:

- Update the technical platform
- Focus the scope of the assessment
- Integrate and standardize policy
- Consolidate duplicate or similar assessment items.

As a part of the revision process, MnCHOICES and MNIT teams have collected requirements in a request for proposal, which was posted on December 5th, 2019. DHS will have more information about vendors that can provide technology and service solutions once the RFP proposals are reviewed. DHS will complete further reliability and validity testing before and after the launch of the revision, followed by annual validity and reliability testing.

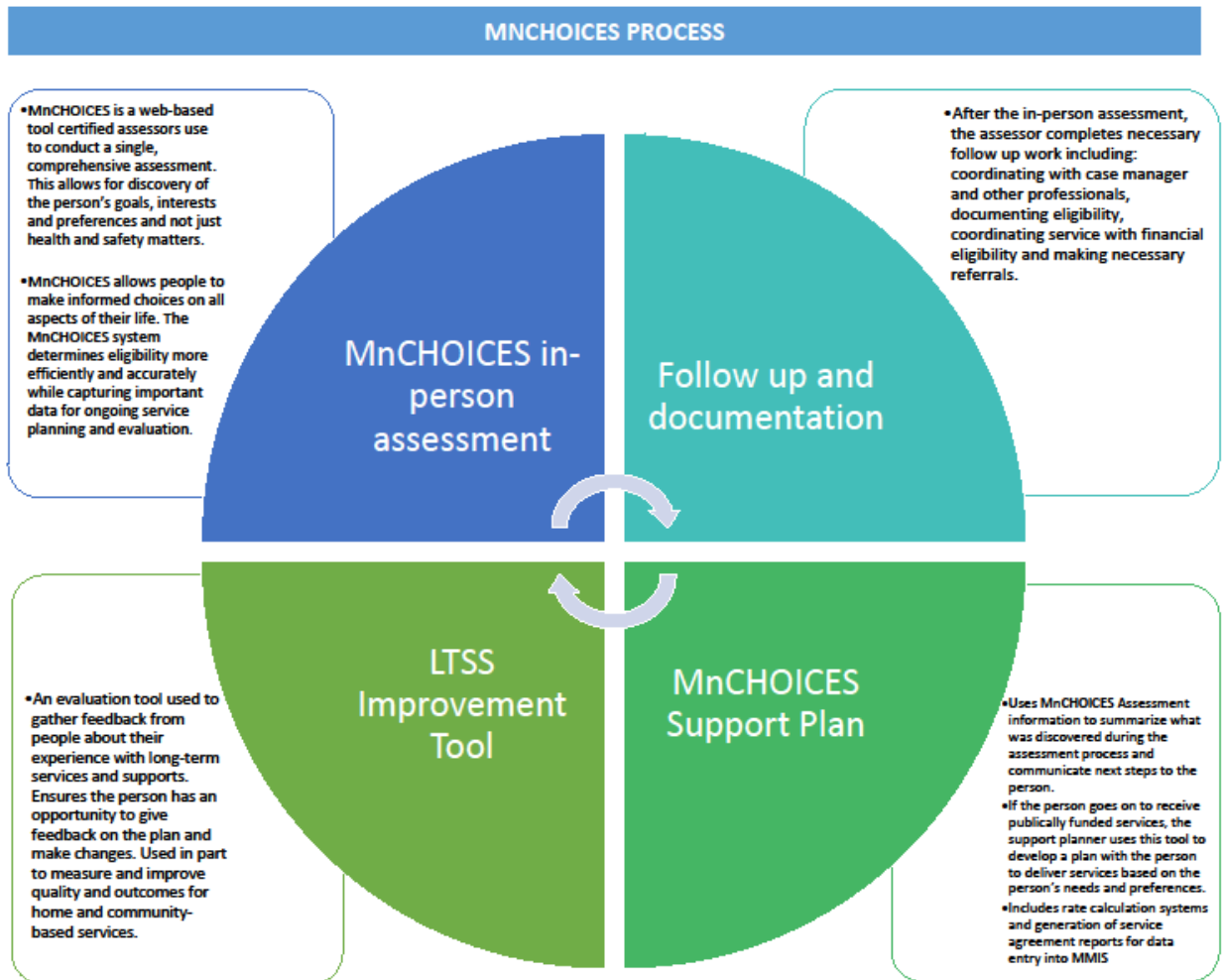
The assessment and eligibility process for LTSS is an end-to-end process that includes approximately 50 steps from start to finish. Many of these steps are outside of the actual MnCHOICES in-person assessment interview process. These supporting activities have always been a part of the LTSS assessment and eligibility process, even with the use of legacy assessment tools. Data has shown that assessors spend most of their time on these supporting activities. DHS is interested in looking further into tasks related to eligibility determination that are outside of the MnCHOICES assessment process and will continue work with lead agencies and other stakeholders to explore further opportunities for efficiencies.

In order to identify opportunities for additional process efficiencies in the MnCHOICES assessment and eligibility process, DHS is working with the Office of Continuous Improvement on a collaborative project with lead agencies. At the time of writing this report, DHS was working to implement a data collection method with plans to complete initial analysis of data by April 2020. DHS will report progress and data to the legislature via annual reports. To implement a more comprehensive data collection strategy, DHS will require further resources. There are also constraints on additional tracking because of time commitments with lead agency staff, which we will take into account when selecting additional efficiency measures.

VIII. Appendix A: Lead agencies represented in process mapping activity

Lead agency
Aitkin County
Beltrami County
Carlton County
Carver County
Itasca County
Morrison County
Ottertail County
Ramsey County
Southwest Health and Human Services
Swift County
Yellow Medicine County

Appendix B: MnCHOICES visual



Appendix C: MnCHOICES assessment and eligibility process map

The MnCHOICES Benchmarks Project Team completed as-is mapping of the initial assessment process on Oct. 11, 2019. This project was completed in conjunction with the representatives listed in Appendix A of this report. The as-is process has been documented using an integrated flow chart format in addition to a narrative description. To view the process map, visit [MnCHOICES assessment and eligibility process map \(PDF\)](#). Right click to save this large file to your computer for easier reading.

If you are using a screenreader to read this report, visit [MnCHOICES assessment and eligibility process map](#) for a detailed text description of the process map.