

COLUMN HEADING	COLUMN DEFINITIONS/INSTRUCTIONS
ACTION	<p>When you receive the spreadsheet for review and approval, this column has one of two values, as follow:</p> <ul style="list-style-type: none"> • [BLANK] means we received the data from the lead agency in the previous on-boarding effort. • "NEW" means we found a new record in MnA or MnSP (added to legacy system after September 13, 2020). (You <u>must</u> select an action code: A, C, or D.) <p>If you need to add, change or delete records, make needed changes to the information. Use the following action codes to designate what to do with the record:</p> <ul style="list-style-type: none"> • Leave the action code [BLANK] if you wish to make no changes to the information. • A (add) means the record did <u>not</u> exist, and you wish to add a user to a particular location and all related information. (You may make necessary changes when you add a record.) • C (change) means the record exists, and you wish to make changes to the information. • D (delete) means the record exists, and you wish to remove the record and all related information.
* GRANT_ACCESS	<p>This column must be populated for to indicate whether the user (for whom you are requesting access) needs access to the system. Enter your answer using the following 2 options:</p> <ul style="list-style-type: none"> • Y (Yes): Requires access to MnCHOICES. • N (No): This person no longer needs access to MnCHOICES for assessment and support planning work. <p>This column is defaulted to "Y".</p> <p>NOTE: If the same user exists in the onboarding spreadsheet more than once for the same location, determine which row has the correct and most complete information. Mark that row as "Y" and mark the other row as "N". (You should delete the other entry.)</p>
* ORG_NAME	This column must be populated with the name of the lead agency you work on behalf of.
* LOCATION_NAME	This column must be populated with your location or whom the person is employed by.
* PW_X_NUMBER	<p>State ID: This column must be populated with either your PW ID or your X1#, if the agency staff has one.</p> <p>NOTE: If the user does not have a PW ID or X1#, the user cannot be loaded.</p>
* FIRST_NAME	This column must be populated with the user's first name.

MIDDLE_NAME	<p>This column may be populated with the user's middle name.</p> <p>NOTE: Please avoid unnecessary punctuation, such as a period after a middle initial.</p>
* LAST_NAME	<p>This column must be populated with the user's last name.</p>
* GENDER	<p>This column must be populated with one of the following values:</p> <ul style="list-style-type: none"> • Female • Male • Non Binary • Unknown/Not Answered • Other <p>This column is defaulted to "Unknown/Not Answered".</p>
* JOB_TITLE	<p>This column must be populated with the user's job title. Please mark your single selection using the drop down menu containing these options:</p> <ul style="list-style-type: none"> • Assessor • Care Coordinator • Case Aid • Case Consultation • Case Manager • Mentor • Planning Analyst • Supervisor • Other <p>NOTE: If you select "Other" and you later update the user's record online, a subsequent entry (Other Description) is required.</p>
* SUPERVISOR_PW	<p>State ID: This column must be populated with the PW ID or X1# of the user's supervisor. This column will tie staff to their supervisor for the supervisors use in the revised MnCHOICES application.</p>
FAX_PHONE_NUMBER	<p>This column may be populated with the user's fax phone number. (10 digits only; spreadsheet is formatted)</p>

MOBILE_PHONE	<p>This column may be populated with the user's mobile phone number. (10 digits only; spreadsheet is formatted)</p> <p>NOTE: If you select Mobile as the user's Primary Phone, Mobile Phone is required.</p>
TTY_PHONE	<p>This column may be populated with the user's TTY phone number. (10 digits only; spreadsheet is formatted)</p> <p>NOTE: If you select TTY as the user's Primary Phone, TTY Phone is required.</p>
* OFFICE_PHONE	<p>This column must be populated with the user's most recent office phone number. (10 digits only; spreadsheet is formatted)</p> <p>NOTE: If you select Office as the user's Primary Phone, Office Phone is required.</p>
OFFICE_EXT	<p>This column may be populated with the user's office telephone number extension. (digits only)</p>
* PRIMARY_PHONE	<p>This column must be populated with the phone type that is the primary phone type for the user. Mark your selection using the drop down menu containing these options:</p> <ul style="list-style-type: none"> • Office • Mobile • TTY <p>This column is defaulted to "Office".</p>
TEXT_PHONE	<p>This column may be populated with the phone type to text to. Please mark your selection using the drop down menu containing these options:</p> <ul style="list-style-type: none"> • Office • Mobile • TTY • [BLANK] <p>This column is defaulted to blank, as it is optional.</p>

* EMAIL_ADDRESS	This column must be populated with the user's primary email address. (use lower case)
* STAFF_ROLE_CONSULT	Consultation provider: Staff in this role are providers that provide consultation services to a person and needs very limited access. (reserved for a future release)
* STAFF_ROLE_CERT_ASSESS	Certified assessor: Staff in this role are a professional who meets the statutory education/experience requirements and are MnCAT certified to complete MnCHOICES Assessments. Tip: for assessors completing support plans for state plan services, add the case manager role. <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. This column is defaulted to N (No).
* STAFF_ROLE_CC	Care Coordinator MSHO/MS+ : Staff in this role create/complete the HRA and associated support plan. Tip: To complete MnCHOICES Assessment add certified assessor role. Y (yes) - Grant role and related privileges. <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. This column is defaulted to N (No).
TRAINLINK_ID	For certified assessors only: This column must be populated with the Certified Assessor's TrainLink Unique Key used when the assessor logs into TrainLink. NOTE: If you select STAFF_ROLE_CERT_ASSESS = Y, TrainLink ID is required to access certain Certified Assessor functionality.
* STAFF_ROLE_CC_SNBC	Care Coordinator SNBC: Staff in this role create/complete the HRA and associated support plan. <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. This column is defaulted to N (No).

<p>* STAFF_ROLE_CASE_MANAGER</p>	<p>Case manager: Staff in this role complete support plans for MnCHOICES assessments and state plan services. This staff role is NOT for use with SNBC or MSHO/MSC+.</p> <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. <p>This column is defaulted to N (No).</p>
<p>* STAFF_ROLE_SUPPORT_STAFF</p>	<p>Support staff: Staff in this role assist with assessment and support plan work (i.e. case aide, intake).</p> <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. <p>This column is defaulted to N (No).</p>
<p>* STAFF_ROLE_RATE_STAFF</p>	<p>Rates staff: Staff in this role create service lines and calculate rates for framework rates. They do not create and complete support plans.</p> <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. <p>This column is defaulted to N (No).</p>
<p>* STAFF_ROLE_AGENCY_REPORTS</p>	<p>Agency reports: Staff in this role are agency staff who generate canned and unique reports for their agency.</p> <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. <p>This column is defaulted to N (No).</p>
<p>* STAFF_ROLE_MICP</p>	<p>MnCHOICES Interagency Contact Point (MICP): This role is used by lead agencies for case coordination between lead agencies. A best practice will be developed as part of launch.</p> <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. <p>This column is defaulted to N (No).</p>
<p>* STAFF_ROLE_SECURITY</p>	<p>Lead agency security admin/liaison: This role is used for user access management (adding, updating and managing users for all locations). This role is able to update organization information as well.</p> <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. <p>This column is defaulted to N (No).</p>

<p>* STAFF_ROLE_LEAD_SUPERVISOR</p>	<p>Lead agency supervisor: Staff in this role have full access for all forms as well as have the ability to assign locations and staff to a person across delegate and contracted case management agencies.</p> <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. <p>This column is defaulted to N (No).</p>
<p>* STAFF_ROLE_DELEGATE_SUPERVISOR</p>	<p>Delegate supervisor: A delegate is a contracted relationship with an MCO. Staff in this role include manage care coordinators for managed care contracts. The supervisor/mentor can add, discharge or transfer assignments to other locations. This role allows for updates of location information to reduce having to send the location information to lead agency supervisors to update.</p> <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. <p>This column is defaulted to N (No).</p>
<p>* STAFF_ROLE_CASE_MGMT_SUPERVISOR</p>	<p>Contracted case management supervisor: This role is a contracted relationship between a case management agency and a county. Staff in this role manage contracted case managers and provide similar abilities to monitor support staff as other supervisors. However, this role can ONLY view and print MnCHOICES assessments and the health risk assessments. This role allows for updates of location information to reduce having to send it to the lead agency supervisor to update.</p> <ul style="list-style-type: none"> • Y (yes) - Grant role and related privileges. • N (no) - Role not needed for job. <p>This column is defaulted to N (No).</p>
<p>DATA_PRIVACY_COMPLETE</p>	<p>This column describes whether the user's data privacy training (required annually) is complete.</p> <ul style="list-style-type: none"> • [Blank] - This means the user must perform required training before access granting access to the system. After the user completes the required course work type the word "DONE" in the blank field. to indicate they have finished the required courses. • Complete - This means the user's obligation to perform required training is current and complete. <p>NOTE: If the required training is incomplete, the user will not receive access to the Revised MnCHOICES system.</p>