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| **DHS Report on open forms for MnA and MnSP and person records not in revised MnCHOICES****Purpose:** For agencies who received a **report on open forms for MnA and MnSP and person records not in revised MnCHOICES**.  This information includes a method to ensure PDF’s are loaded by double checking the SW Index IDs and provides answers to commonly asked questions. * Though the deadline is September 15, do not wait until the last minute to submit your MnCHOICES Help Desk Ticket (see options to resolve below). Start sending them in as soon as they’re noticed to allow the MnCHOICES help desk adequate time to process all of the requests before the systems are retired at the end of September.

**SW Index Instructions:**Legacy applications include MnCHOICES 1.0 Assessment (MnA) and MnCHOICES 1.0 Support Plan (MnSP).1. **For Person you recently added or will be adding to revised MnCHOICES:** In the revised MnCHOICES application go to thePerson Profile, Identifier section. The MMIS ID needs to match the Report’s Person record SW Index ID (SWNDX ID). If the IDs match, the historical pdf will load in October.
2. **Past closed forms are not loading to person record:** SW Index ID in the Report tab (Legacy MnA, Legacy MnSP) for the person in does not match the MMIS ID in the revised MnCHOICES.

**How to determine if MMIS and SW Index ID match:*** Revised MnCHOICES, Person profile MMIS ID

**Screenshot of revised MnCHOICES application displaying MMIS ID under Identifiers.** **DHS Report on Person record not in MnCHOICES 1.0** (Closed Forms pdfs not loading tab) * The column SW Index ID needs to match the revised MnCHOICES MMIS ID.

**Screenshot of DHS Report on Person records not in MnCHOICES displaying the column SW Index ID.** Options to resolve: 1. **Create a list of person records with SWNDX ID and MMIS ID that do not match and submit it in the MnCHOICES Help Desk form Question Type – Technical. In the description write, “Historical data fix” and include:**
	* The Person ID in MnCHOICES Revision aka ‘System ID’ (This must be included)
	* The PERSON\_ID from the report for MnA or MnSP.
	* The MnCHOICES Help Desk will repair the issue in the legacy system so your historical records will load to the revised MnCHOICES.
2. **Option for manually attaching instead of submitting a help desk ticket if your agency has a small list of records where the SW Index does not match:**
* Go into the legacy application and use the print option to save the form as a pdf.
* Attach the forms in the person record attachments following the naming convention in the Smart Guide: Adding a person and select the attachment Category “Plans & Reports”.
* Though your agency may retain records in other systems, historical records attached in a person’s record are useful for agencies who may work with the person in the future.

Commonly asked questions:**Question 1: How do we load a person into the revised MnCHOICES application?****Answer 1:** Go to the MnCHOICES Help Center and use the Smart Guide: Adding a person.  You will use the advanced search and if the person is not found add a person. You will complete the required fields in the New Person window. We prefer you include the PMI in the advanced search.  MnCHOICES will search first for duplicate record in MnCHOICES, then check MMIS. If the person exists in MMIS you can import the person record into MnCHOICES. If the record does not exist in the database the person will be added. **Question 2: Do I need to add a deceased person to the revised MnCHOICES?** **Answer 2:** No. Your agency will not be completing assessments or support plans for this person in the future.**Question 3: We have an assessment that was not abandoned and does not have an assessor what do we do with it?****Answer 3:** The reasons why you are doing this work is to have historical data in the revised MnCHOICES for future use. If the open assessment will be abandoned it won't come over to the MnCHOICES revision. It is okay to leave it and do nothing with it. The same is true for assessments that were never started. **Question 4: We have an assessment that is assigned to a former staff and can’t close it.****Answer 4:** Submit a request to the help desk with the assessment ID(s) and the staff to reassign to.**Question 5:** We have an assessment that won’t open. Error message: “*Document cannot be viewed because there is no Assessment Date. Go to Assessment Queue to add Assessment Date*”.**Answer 5:** The assessment was not started so it can be left as is. It does not need to be loaded as a pdf to the revised MnCHOICES application. **Questions:**MnCHOICES mentors use the [MnCHOICES Help Desk Contact Form, DHS-6979](https://urldefense.com/v3/__https%3A/edocs.dhs.state.mn.us/lfserver/Public/DHS-6979-ENG__;!!CwIvYz4dIaSa!IMr5uIqXCxPrXwA1tiThI5M0nv9nWabQfKI14hpugrjcciCN6dbmtb1bI2ScYxHMztuy2dGI7anTV54dBVzZ0AZWriGU$) to submit their agency’s questions or concerns.  |