



# Legislative Report

## MnCHOICES Benchmarks

Annual data report

Disability Services Division

February 2021

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# Contents

- I. Executive summary 4
  - MnCHOICES benchmark project background 4
  - Current status 4
  - Data 5
  - Conclusions 5
- II. Legislation 6
- III. Introduction 7
- IV. MnCHOICES benchmark project background 8
- VI. Current Status 10
  - Blue Ribbon Commission proposal 11
  - COVID-19 impacts to project 11
  - MnCHOICES revision project 12
- VII. Annual data report 13
  - 1. Number of people assessed using MnCHOICES 13
  - 2. Average minimum/maximum time from in-person assessment to final paperwork mailed to person 15
  - 3. Number of times the initial assessment and eligibility determination process exceeds 60 days 16
  - 4. Time it takes to do an in-person interview 18
  - 5. Number of people with multiple assessments during a calendar year 19
  - 6. Number of days waiting on financial eligibility determination 20
- VIII. Conclusion 22

# I. Executive summary

This is the second report issued by the Department of Human Services (DHS) in accordance with Minnesota Laws 2019, First Special Session, article 5, section 47 requiring DHS to work with lead agencies to develop a set of measurable benchmarks relating to the long-term care consultation (LTCC) assessment and eligibility process. The [first report](#) was issued in February 2020.

This second report serves as the annual data report and introduces the process DHS used to develop a set of measurable benchmarks for lead agencies (counties, tribal nations and managed-care organizations) responsible for conducting LTCC services. The report provides an update on the status of the benchmarks project and provides preliminary data on each performance measure. It also includes conclusions about next steps and plans for ongoing reporting of data.

## MnCHOICES benchmark project background

DHS began working with the DHS Office of Continuous Improvement in July 2019 on a collaborative project with county representatives. The goal of the project was to identify potential opportunities for performance measures (benchmarks), collect data and complete an initial analysis of data.

DHS worked collaboratively with lead agencies to determine which measures they found most useful, their preferred method of tracking data and other related items. DHS and lead agencies mutually agreed on the following six measures:

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 initial 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

## Current status

Data collection on four of the six measures began January 2020.

- Measure four required a technical build to the MnCHOICES Assessment to record the total in-person interview time for initial assessments and reassessments (effective March 16, 2020).
- Measure five is an annual measure; 2019 data is provided for the purposes of this report.

A proposal by the Blue Ribbon Commission and included in their final report on Sept. 24, 2020 addressed how the assessment and eligibility process is delegated to counties and tribal nations and implemented in various ways depending on each individual county's or tribal nation's processes. These differences in agency practices create variations in determining eligibility, length of time to complete the processes and inconsistent experiences for the people asking for help. The Blue Ribbon Commission proposal recommends process

improvement plans be completed with select counties and tribal nations to identify opportunities for efficiencies and streamlining.

The COVID-19 pandemic caused disruptions to the MnCHOICES benchmarks project and the data collected. Regulatory flexibilities were put in place to give counties the ability to meet the needs of the people in their communities and maintain safety while balancing shifting priorities. This had an effect on how counties completed assessment and eligibility work, therefore influencing the benchmark data.

At the time of this report, DHS and MNIT are working with a vendor, FEI Systems, on the MnCHOICES Revision project. This project started because the current version of MnCHOICES will lose vendor support for software critical to the application. However, it has provided an opportunity to address other technology and business needs, including more efficient assessment and support planning processes for lead agencies.

## Data

Data on 2020 measures are broken down into quarters based on calendar year.

- Quarter one: January 2020 through March 2020
- Quarter two: April 2020 through June 2020
- Quarter three: July 2020 through September 2020

In some cases, additional county-level data is provided to illustrate the wide range among counties throughout the state. However, no individual county names are listed.

## Conclusions

The MnCHOICES benchmark project has provided many learning opportunities for DHS and county partners. The process map created as a first step in the project is a valuable tool, providing a deeper understanding of the assessment and eligibility process, identifying approximately 50 steps from start to finish. This process map was used to kick off the partnership with the vendor working on the MnCHOICES Revision project. DHS remains committed to identifying further efficiencies in the assessment and eligibility process, and working with lead agency partners to assist with further improvements at an agency level.

Due to the timing of the launch of the revised MnCHOICES system (which will bring additional efficiencies), as well as the impacts of COVID-19 on assessment and eligibility policies and procedures, it is recommended that the benchmarks project be put on hold until after the launch of the revised system, targeted for the end of 2021. DHS can continue to collect data during this provisional time; however as it is not an accurate reflection of normal policy and lead agency workflow; it should not be used as a standard or point of reference against which efficiency measures should be compared.

## II. Legislation

Minnesota Statutes section 256B.0911, subdivision 5 (c) 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 provides preliminary data on a set of measurable benchmarks intended to create efficiencies in county functions related to the MnCHOICES assessment and eligibility process.

The report includes the following four sections:

- MnCHOICES benchmark project background: Overview of the project to identify opportunities for process efficiencies (benchmarks), implement a data-collection method and complete initial analysis of data.
- Current status: Summary of the six selected performance measures and update on COVID-19 related effects on measures.
- Annual data report: Provides the data collected from January 2020–September 2020.
- Conclusion: Next steps for benchmarks project and ongoing reporting of data.

# IV. MnCHOICES benchmark project background

Minnesota Statutes section 256B.0911, subdivision 5 (c) requires DHS to work with lead agencies responsible for conducting LTCC 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 objective of the project was to identify performance measures (benchmarks), then collect and complete an initial analysis of data. This project focused on establishing performance measures, but was not intended to implement process efficiencies. In order to determine the areas for improvement, DHS and the Office of Continuous Improvement:

- Worked with a group of 11 assessors across the state to complete an end-to-end process flow of the assessment and eligibility process
- Identified potential performance measures and rated 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.
- Sent a survey to all lead agency supervisors to gather their feedback on areas that were selected for ongoing measurement and provide priority ranking for additional measurements

Based on survey response, the team selected six areas for benchmark measurement. The measures are outlined below, along with the goal or purpose of each.

**Table 1: Performance measures and goals/purpose**

Measure	Goal/Purpose
1. Number of people assessed using MnCHOICES	<ul style="list-style-type: none"> <li>• This data is important to collect to have an understanding of the overall volume of MnCHOICES assessments completed and the number of people who have participated in a MnCHOICES assessment</li> </ul>
2. Average minimum/maximum time from in-person assessment to final paperwork mailed to person	<ul style="list-style-type: none"> <li>• Data will help determine if people are receiving timely access as required by state statute and policy</li> <li>• Data will help identify specific situations that take longer and determine what could potentially reduce barriers</li> </ul>
3. Number of times the initial assessment and eligibility determination process exceeds 60 days	<ul style="list-style-type: none"> <li>• In order to inform future policy decisions, it is important to know how often the initial assessment and eligibility determination process exceeds the maximum allotted 60 days</li> </ul>

Measure	Goal/Purpose
4. Time it takes to do an in-person interview <ol style="list-style-type: none"> <li>a. Initial assessment</li> <li>b. Reassessment</li> </ol>	<ul style="list-style-type: none"> <li>• Tracking this measure statewide for every assessment will provide more reliable, concrete data to inform decision making at a local, policy and legislative level</li> <li>• Previously, this data was available through anecdotal reporting only</li> </ul>
5. Number of people with multiple assessments during a calendar year	<ul style="list-style-type: none"> <li>• In order to reduce unnecessary assessments as well as inform future policy decisions, it is important to have data on the number of people with multiple assessments during a calendar year</li> <li>• Data will allow DHS to identify individual lead agencies where unnecessary multiple assessments are occurring and offer technical assistance to those agencies</li> </ul>
6. Number of days waiting on financial eligibility determination	<ul style="list-style-type: none"> <li>• The assessment and eligibility process involves more than just the MnCHOICES assessment; it also relies on financial eligibility being determined timely; this measure shows the number of days it takes to determine health care eligibility</li> </ul>

## VI. Current Status

After reaching agreement on the six performance measures, DHS’s next step was to implement a data collection method. The data sources used for the benchmark measures include:

- MnCHOICES Assessment
- MnCHOICES Support Plan
- Medicaid Management Information System (MMIS)
- MAXIS: a computer system used by state and county workers to determine eligibility for public assistance and health care

Data collection for measures 1–3 and measure 6 began in January 2020. For measure 4, a field had to be built into the MnCHOICES Assessment application to record the total in-person interview time for initial assessments and reassessments (effective March 16, 2020).

Measure 5 can only be analyzed on an annual basis. In order to know the number of people who had multiple assessments within a calendar year, the full year of data must be available. For reporting purposes, CY2019 data has been included in this report.

**Table 2: Performance measures, data sources and date of data collection start**

Number	Measure	Data source(s)	Date of data collection start
1.	Number of people assessed using MnCHOICES	MnCHOICES Assessment	1/1/2020
2.	Average minimum/maximum time from in-person assessment to final paperwork mailed to person	MnCHOICES Assessment MnCHOICES Support Plan	1/1/2020
3.	Number of times the assessment and eligibility determination process exceeds 60 days	MMIS	1/1/2020
4.	Time it takes to do an in-person interview c. Initial assessment d. Reassessment	MnCHOICES Assessment	3/16/2020

Number	Measure	Data source(s)	Date of data collection start
5.	Number of people with multiple assessments during a calendar year	MnCHOICES Assessment MMIS	1/1/2019
6.	Number of days waiting on financial eligibility determination	MAXIS	1/1/2020

## Blue Ribbon Commission proposal

The Minnesota legislature and Governor Tim Walz created the Blue Ribbon Commission on Health and Human Services in 2019. The goal was to develop an action plan for transforming the health and human services system.

One of the strategies in the commission’s [final report](#) (issued on Sept. 24, 2020) related to the LTSS assessment and eligibility process. Because the LTSS assessment and eligibility process is delegated to counties and tribal nations, it is implemented in various ways depending on each individual county’s or tribal nation’s processes. These differences in agency practices create variations in determining eligibility, length of time to complete the processes, and inconsistent experiences for the people asking for help.

Through the Blue Ribbon Commission strategy, DHS would create and implement a process improvement plan with counties and tribal nations across the state building on the process mapping done through this benchmarks project. Using these findings, DHS would work with pilot counties to implement changes and streamline the LTSS process across the state. As part of this work, DHS would incorporate feedback from people who have had a MnCHOICES assessment, and work with counties and tribal nations on identifying efficiencies in their agency-specific processes while identifying best practices. The work would also include producing a guide for families and people requesting assessment that provides a clear explanation of the process and spans the assessment and eligibility process.

## COVID-19 impacts to project

The COVID-19 pandemic caused disruptions to the MnCHOICES benchmarks project and the data collected. On March 20, 2020, the governor announced Executive Order 20-12, [Preserving Access to Human Services Programs During the COVID-19 Peacetime Emergency](#). DHS put regulatory flexibilities in place, including the ability for initial assessments and reassessments to be done on the phone or by other electronic communication instead of in-person. Because measure four was implemented on March 16, 2020, data collected on this measure now reflects the time it takes to do a phone or video interview instead of an in-person interview.

Second, due to the COVID-19 pandemic there were additional demands on county and tribal nations to ensure the health, safety and well-being of their residents. Therefore, shifting priorities within counties and tribal nations affected some of the other measures. For example, some counties redeployed staff to help with their

pandemic response. This potentially had a negative effect on the remaining timeline measures as counties were working with reduced staff capacity.

In addition, there are differences in some of the data points from CY2019 to CY2020 that likely are a result of COVID-19 but it is not possible to correlate direct causation. One example is the total number of initial assessments. When comparing the first three quarters of 2019 to the first three quarters of 2020, there is a decrease of 14%. Because there has not been significant variation from year to year prior to COVID-19, it is plausible to conclude that the COVID-19 pandemic affected the number of people reaching out for initial assessments.

## **MnCHOICES revision project**

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. DHS and the Minnesota IT Services (MNIT) team selected a vendor, FEI Systems, to collaborate on the MnCHOICES Revision project and provide a “software as a service” platform for the MnCHOICES application. The contract was executed on Sept. 14, 2020 and work began with FEI Systems on Sept. 21, 2020. This move to a vendor-hosted platform eliminated the need for DHS to maintain a custom-built application for MnCHOICES. This will increase stability and intuitive navigation of the application. The goal of the revision includes (but is not limited to) the following:

- Greater support for person-centered assessment and practice
- Elimination of duplicate/repetitive questions
- More efficient intake process
- Access to information (reports)
- Need for reassessment workflow support
- Business content management capability
- Versioning ability
- Improved application response times

DHS started our fast-paced requirements sessions with FEI Systems to sort and gather the needed details to begin building the new MnCHOICES application. The work kicked off with a walkthrough of the process map created for the benchmarks project, with specific attention to the pain points identified by the lead agency participants that were unique to the MnCHOICES process. As we continue our working sessions with the vendor, we will be sending surveys to lead agencies requesting feedback about workflow and features of the new application. Lead agency perspective is critical to ensure we create a tool that is effective and efficient for both the users and the people we serve. We will include external partners in testing and input of the new application during User Acceptance Testing (UAT). We anticipate that we will begin UAT in summer 2021. Following UAT, we will continue preparations for a full application launch expected before the end of 2021.

# VII. Annual data report

Data for measures 1–3 and measure 6 are reflective of January 2020–September 2020. Measure 4 began data collection on March 16, 2020. Because this coincided with the COVID-19 flexibilities put in place in March 2020, this measure now reflects the time it takes to do a phone or video interview instead of an in-person interview.

The quarterly breakdowns depicted in the charts below include the following months:

- Quarter one: January 2020 through March 2020
- Quarter two: April 2020 through June 2020
- Quarter three: July 2020 through September 2020

Measure 5 can only be analyzed on an annual basis. In order to know the number of people who had multiple assessments within a calendar year, the full year of data must be available. CY2019 data is used in this report to allow for a full year of data to be analyzed.

In some cases, additional county-level data is provided to illustrate the wide range among counties throughout the state. In these visualizations, the county names are pseudonymized in order to not identify the specific agency referenced. The intention for including these additional data visualizations is to help display the wide variation throughout the state, not to identify individual county practices.

## 1. Number of people assessed using MnCHOICES

Figure 1: Number of people assessed using MnCHOICES

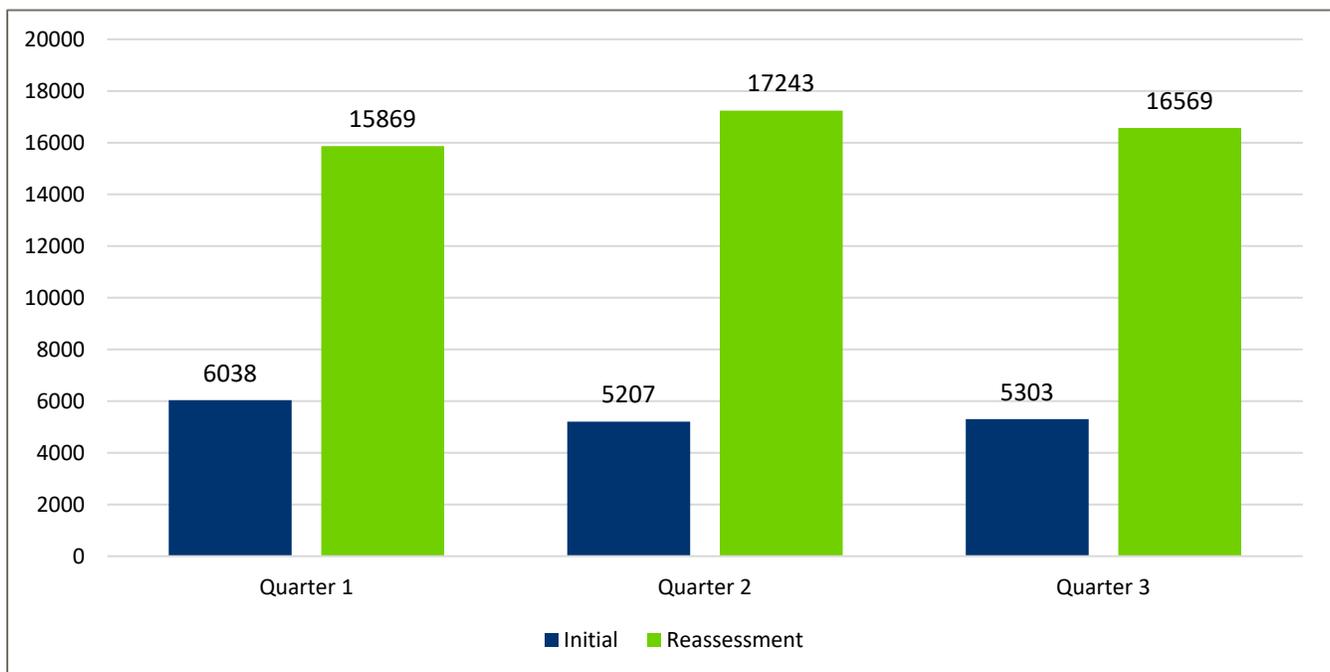
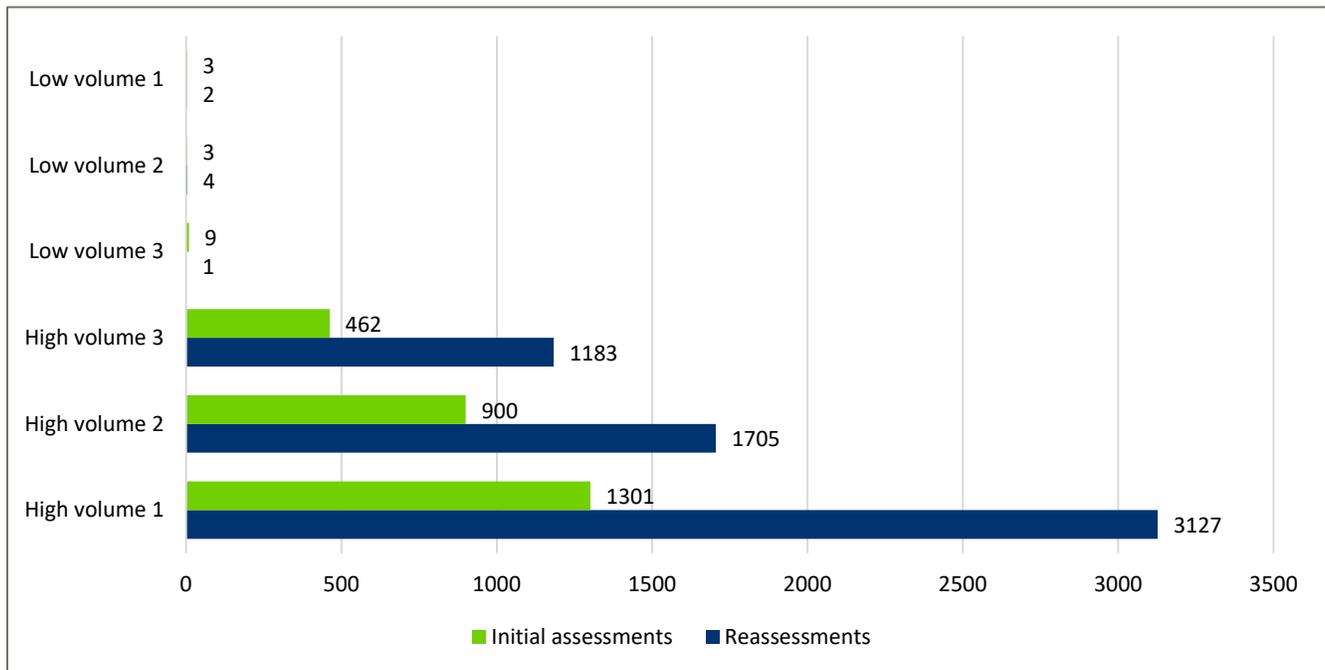


Figure 1 shows the number of people assessed using MnCHOICES. In the first three quarters of calendar year 2020, there were 16,548 initial assessment completed statewide. Compared to 2019 data for the same period,

initial assessments have decreased approximately 14% in the first three quarters of calendar year 2020. This could be partially attributed to assessments completed later in quarter three that were not yet closed and complete in the MnCHOICES system by the end of the reporting period. However, COVID-19 related affects should be considered as a probable reason for the significant decrease in initial assessments.

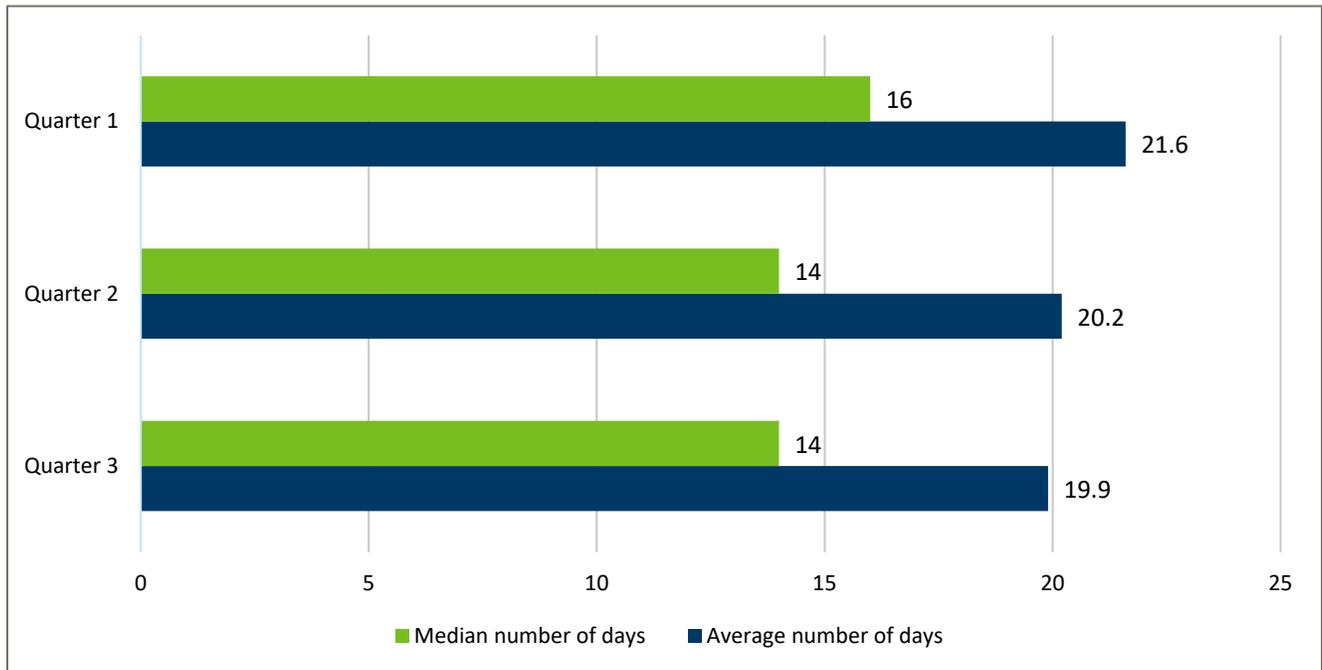
There is wide variation in the number of initial assessments and reassessments counties across the state perform on a quarterly basis. This variation is important to note as county procedures and practices may vary depending on the agency size and structure. The chart below illustrates the range of assessments completed in the three highest and three lowest volume counties in quarter 1:

**Figure 2: Variation between high volume and low volume counties in initial and reassessments**



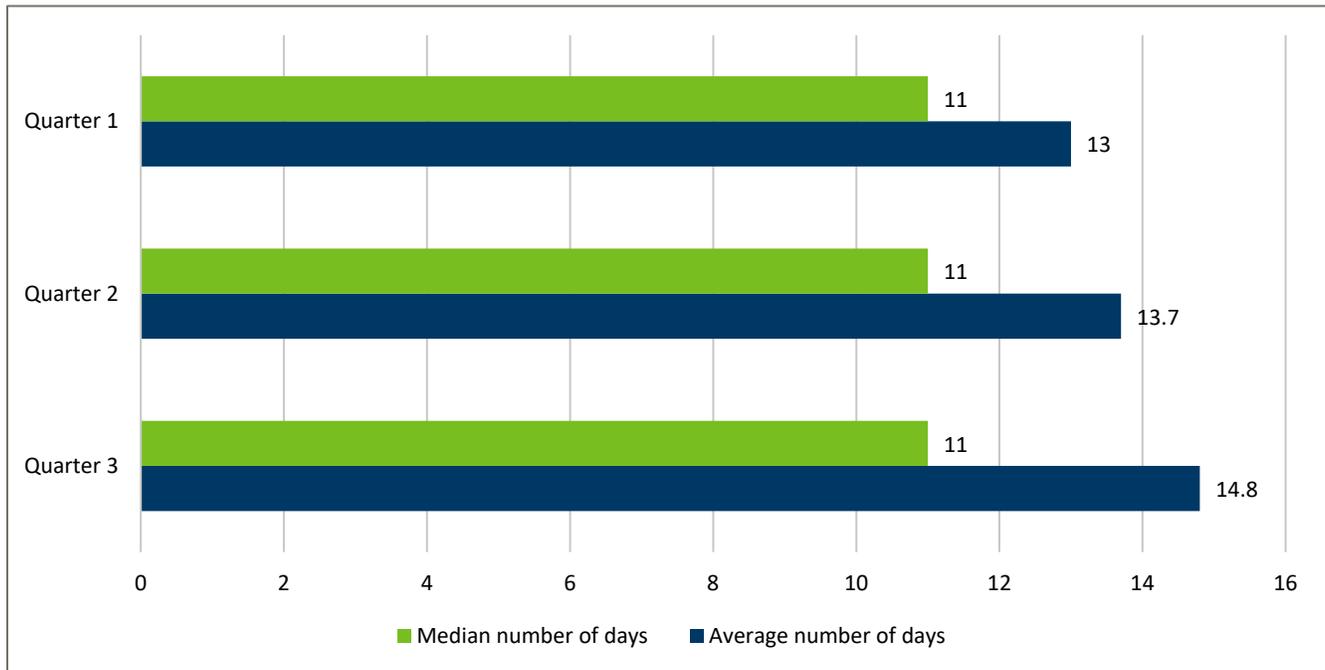
## 2. Average minimum/maximum time from in-person assessment to final paperwork mailed to person

Figure 3: Median and average number of days from assessment to final paperwork mailed for initial assessments



\* Dates over 426 days were removed for purposes of data analysis. The final paperwork is only valid for one year; if the final paperwork wasn't sent within the year, the assessment and corresponding documents are no longer valid. Lead agencies have a span of 60 days prior to the end of the validation period to complete the updated assessment.

**Figure 4: Median and average number of days from assessment to final paperwork mailed for reassessments**



\* Dates over 426 days were removed for purposes of data analysis. The final paperwork is only valid for one year; if the final paperwork wasn't sent within the year, the assessment and corresponding documents are no longer valid. Lead agencies have a span of 60 days prior to the end of the validation period to complete the updated assessment.

For this measure, the final paperwork is defined as the person's Community Support Plan (CSP). This document is a written summary completed for everyone who has an assessment, regardless of whether the person is eligible for Minnesota Health Care Programs (MHCP) or chooses to receive publicly-funded home and community-based services or state plan services. This document provides a summary of what the assessor discovered through the assessment process and identifies next steps based on the person's needs.

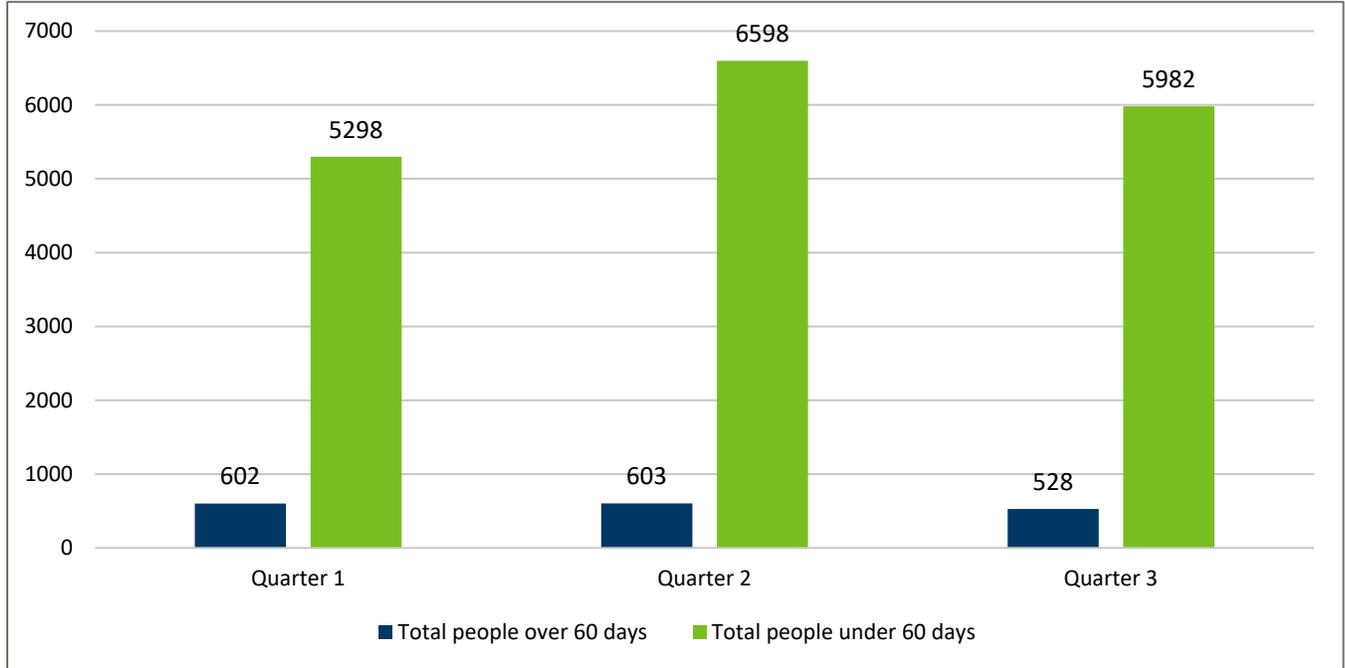
In the first three quarters of 2020, the time from initial assessment to the final paperwork (CSP) mailed averaged 20.5 days. The median number of days was 14.6. For reassessments, the average was 13.8 days, while the median number of days was 11. MN law allows for 60 days from the time of the assessment to the time the Coordinated Services and Supports Plan (CSSP) is provided to the person (a CSSP is only completed if the person is eligible for and chooses to receive publicly funded home and community-based services and/or state plan services).

### **3. Number of times the initial assessment and eligibility determination process exceeds 60 days**

In 2013, the Minnesota Legislature authorized a way for lead agencies to update and reestablish a person's program eligibility when there is a delay in accessing programs because the person's administrative eligibility determination(s) are pending. The law also allows for an eligibility update to extend the time an agency can determine a person's program eligibility without another in-person assessment. The chart below illustrates the

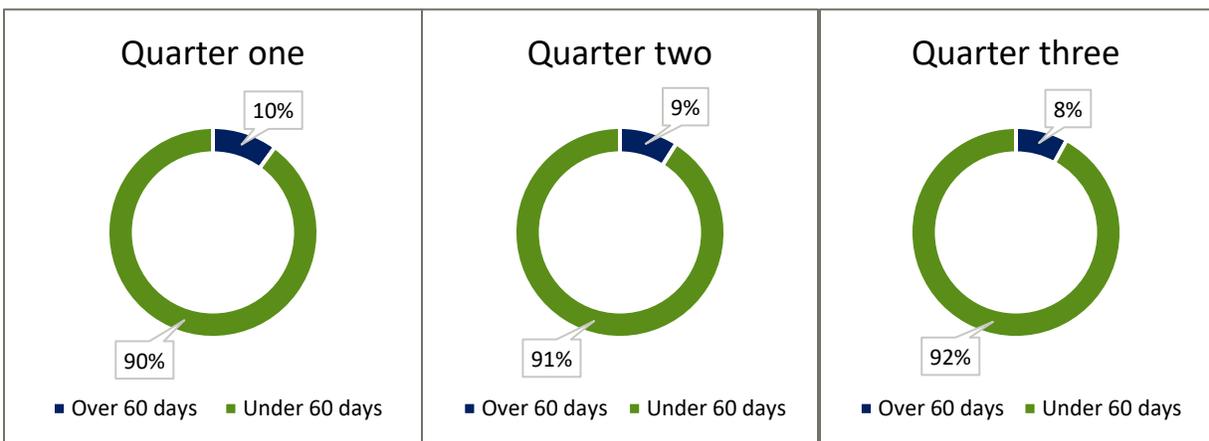
number of people where the initial eligibility determination took over 60 days and the number of people where the initial determination took under 60 days.

**Figure 5: Total number of people where the assessment and eligibility process took over 60 days or under 60 days**



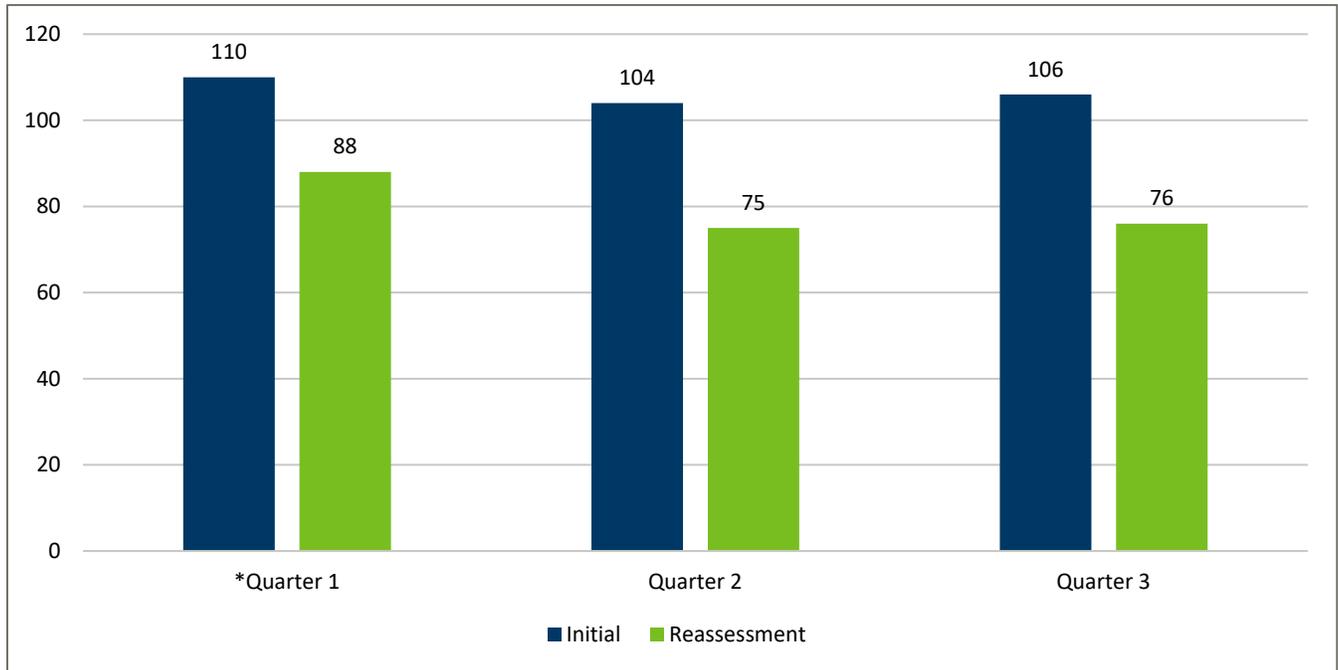
The charts below illustrate the percent of assessments over and under 60 days, by quarter. On average, 9% of people had their eligibility determination take over 60 days.

**Figure 6: Percentage of people where the assessment and eligibility process took over 60 days or under 60 days**



## 4. Time it takes to do an in-person interview

Figure 7: Average time spent in the assessment interview for initial assessments and reassessments



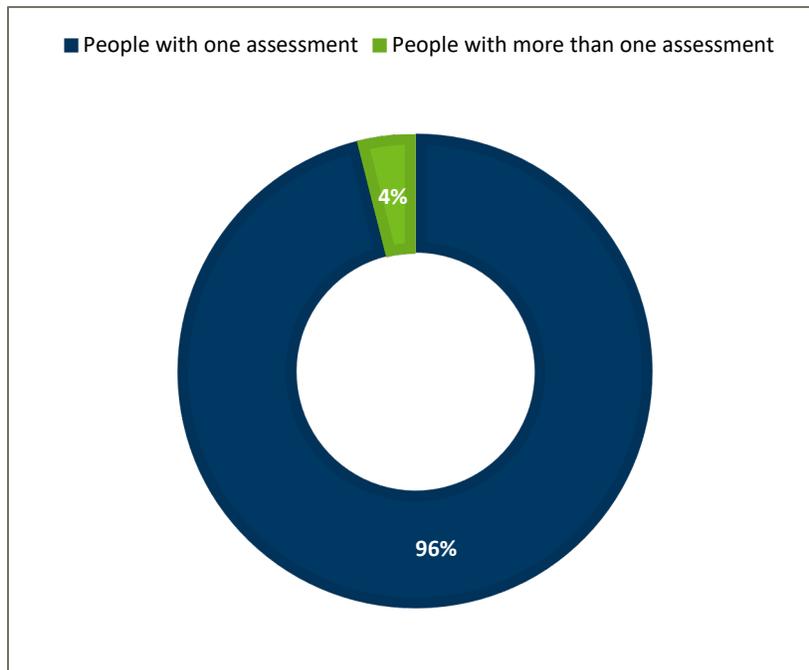
\*Quarter 1 data for this measure is from March 16, 2020 through March 30, 2020.

\*\*A COVID-19 related policy allowing assessments to be completed remotely was implemented on March 20, 2020. Therefore, the data above is reflective of phone or video based assessments and not in-person assessments.

Overall, in the first three quarters of 2020, initial assessment interviews took an average of 107 minutes and reassessment interviews took an average of 80 minutes. The MnCHOICES assessment is a comprehensive, holistic assessment that incorporates state and federal requirements for person-centered planning. The assessment is tailored to the person being interviewed and the time it takes is driven by the person. Considering the comprehensive nature and taking into account individual peoples' needs, DHS considers this as appropriate amount of time for the assessment interview. Although Minnesota Statutes section 256B.0911, subdivision 5 (c) requires DHS work to achieve "quarterly improvement in the average time per assessment," we feel the assessment is taking the right amount of time on average. There is, however, room for improvement and efficiencies in other areas relating to assessment and eligibility determinations. DHS will continue to work with counties and tribal nations to make progress in these other identified areas.

## 5. Number of people with multiple assessments during a calendar year

Figure 8: Percent of people with multiple assessments in CY2019

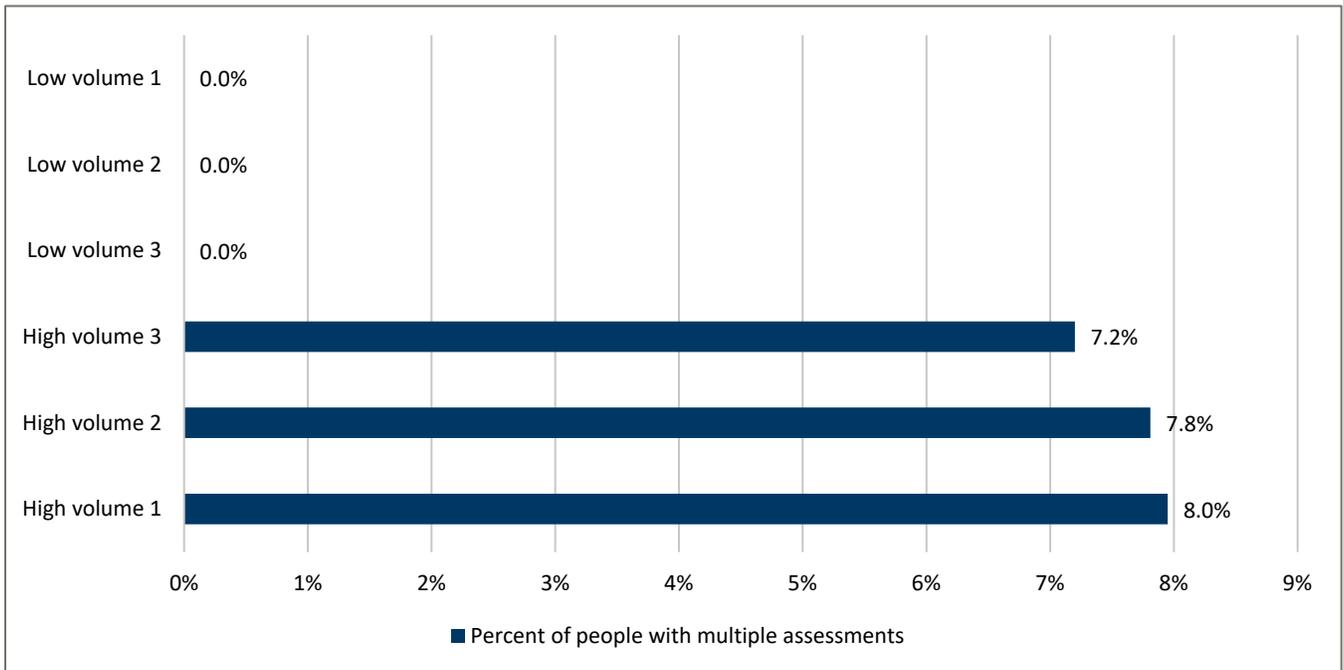


In CY2019, 82,182 people had a MnCHOICES assessment. Of those people, 3,212 people had more than one assessment in the calendar year. A “multiple assessment” is defined as when a person has an additional assessment in the calendar year in addition to their scheduled annual reassessment. This typically occurs for one of three reasons:

1. The person experiences a significant, potentially long-term change in need for services and supports before the anticipated annual reassessment. Potential reasons include an emerging need or risk, a major health event or a worsening health condition.
2. The person turns 65 years old and is on a Brain Injury (BI), Community Alternative Care (CAC) or Community Access for Disability Inclusion (CADI) waiver.
3. The person experiences an institutional stay such as a nursing facility or an intensive residential treatment service (IRTS).

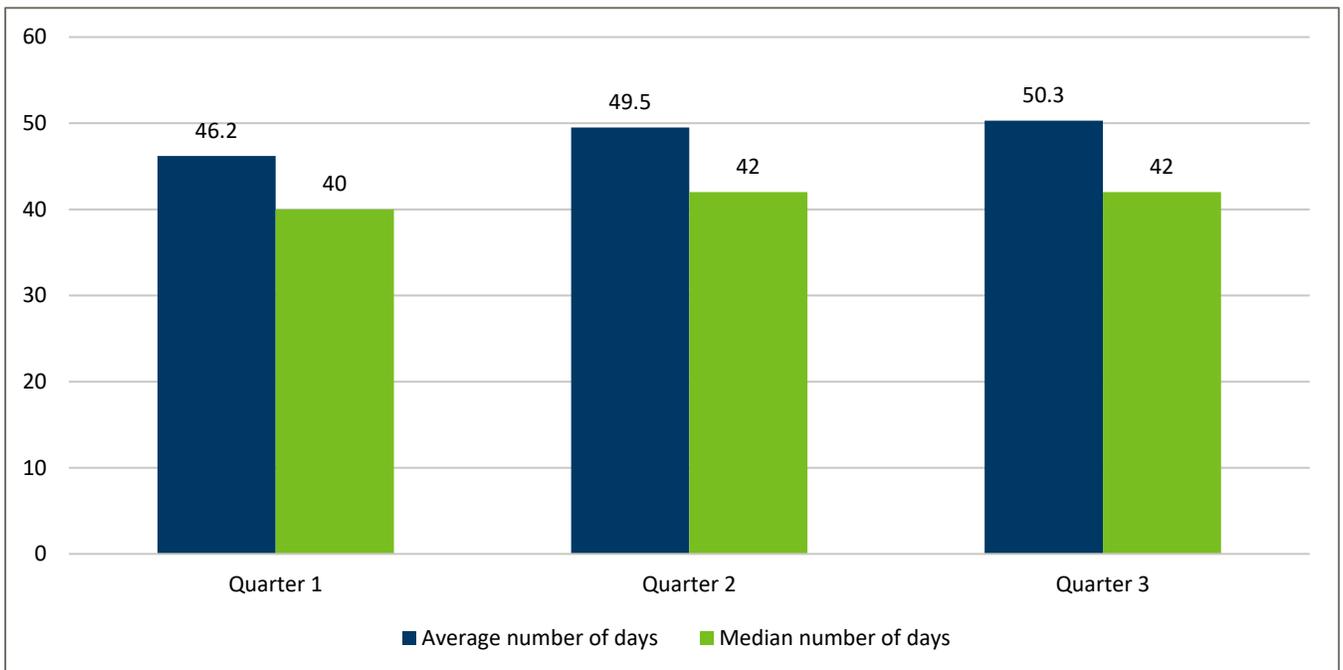
Across the state, there is some variation among counties where multiple assessments were completed for a person in CY2019. The chart below shows the top and bottom three counties based on a percentage of their total people assessed. The bottom three counties had zero people who received a multiple assessment and the high volume counties had an average of 7.7% of people who received a multiple assessment.

**Figure 9: High volume and low volume counties: percent of people with multiple assessments in CY2019**



## 6. Number of days waiting on financial eligibility determination

**Figure 10: Average number of days and median number of days waiting on financial eligibility determination**

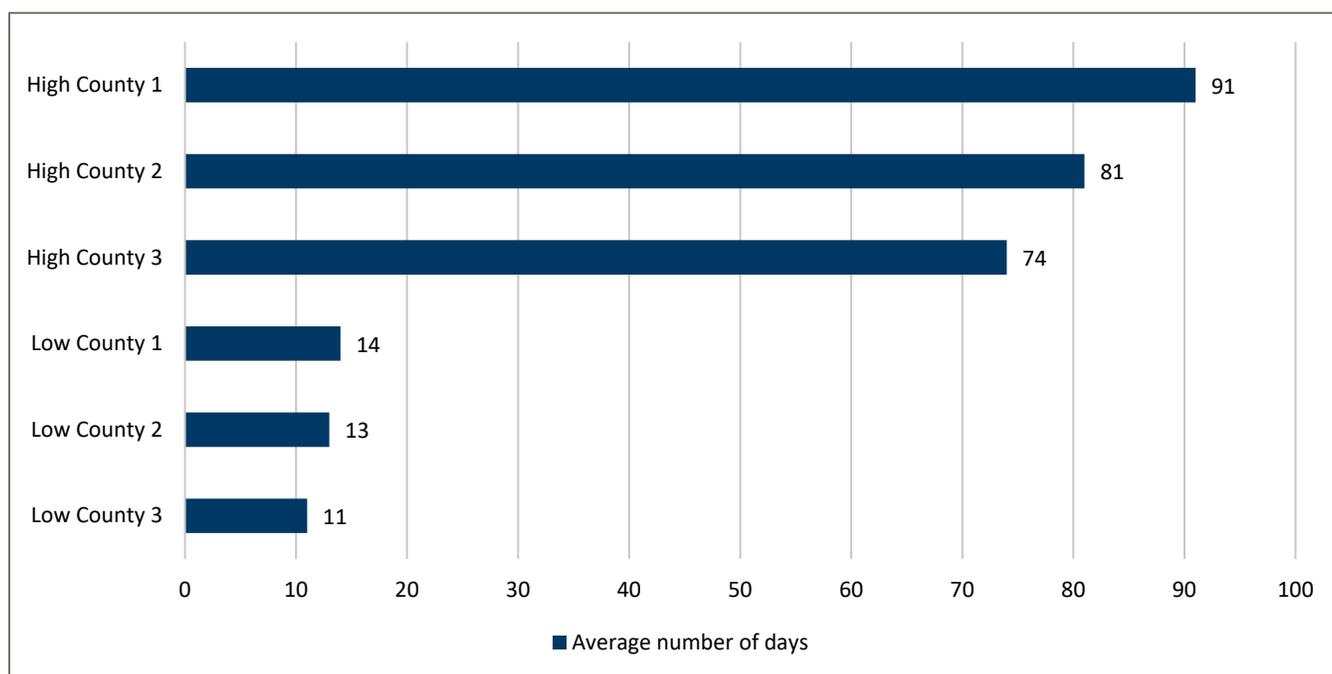


\*This measure depicts the Medical Assistance (MA) application to MA approval dates for waiver recipients.

The MnCHOICES assessment determines if a person meets *functional* eligibility for publically-funded programs. Needs identified during the assessment interview are entered into the MnCHOICES application. Rules are run in the system to determine if the person meets different levels of eligibility. Besides being functionally eligible, there are two other eligibility factors that must be met; the person must be certified disabled and must meet financial eligibility requirements.

In order to be eligible for a Home and Community-Based Services (HCBS) waiver program, the person has to be approved for a certain type of Medical Assistance. Determining financial eligibility is a task that is typically handled by an economic assistance or financial assistance department at the lead agency that is the person's county of financial responsibility. There is a variation among lead agencies in how long this process takes on average.

**Figure 11: Average number of days waiting on financial eligibility determination; top and bottom counties**



## VIII. Conclusion

The MnCHOICES benchmarks project has provided an opportunity for DHS to examine the end-to-end process for determining LTSS eligibility for Minnesotans. Valuable work has been completed, including the creation of a process map showing approximately 50 steps from start to finish. Many of these steps are outside of the 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. In addition, the process mapping activity also found many variations in county processes that add to the number of steps and time involved in determining eligibility for long-term services and supports. Further efficiencies are attainable at the local level to assure effective workflows and improve assessment quality.

Because of the impact of COVID-19, the data collected for the performance measures is no longer an accurate reflection of lead agency workflow and timeliness. Regulatory flexibilities have been put in place at both the state and federal level to allow Minnesota's lead agencies to continue to provide essential programs and services to people who receive services safely and without undue delay during the COVID-19 pandemic. Many of the waivers and modifications will stay in effect for an extended time, at least 60 days after the end of the peacetime emergency. This timeline will likely coincide with the upcoming launch of the revised MnCHOICES system, anticipated by the end of 2021. The launch of the revised MnCHOICES will result in a learning curve requiring additional training and testing by lead agencies.

Due to the COVID-19-related effects, and the timing of the revised MnCHOICES, it is recommended that the benchmarks project be paused. Once the revised system is launched, and lead agencies are well-versed in the system, DHS could resume data collection to set appropriate benchmarks. DHS can continue to collect data during this provisional time — however, as it is not an accurate reflection of normal policy and lead agency workflow, it should not be used as a standard or point of reference against future measures.