

MPATH Care Management Module Organizational Change Management Project, Email Communication for 2/9/2021

Subject Line for Email: MedCompass Training Update and Naming Conventions

Dear Region Staff and Providers:

MedCompass training is well under-way and implementation is right around the corner on Tuesday February 16! We held 7 trainings last week for state staff, case managers, and providers and trained over 300 users on the new system. Staff and providers report the training is really helpful. Jodi Mackay from COR said, *"I enjoyed the training and I was glad we had something so detailed and thorough...My best advice to others is to welcome this change. Those that are more hesitant with change and technology seemed very nervous about this training and that gets in the way of understanding the system and learning. I really do feel this system is user-friendly and will help the work flow and keep everyone on the same page."*

We appreciate you taking the time to prepare for MedCompass implementation. If you haven't attended training yet, here are a few tips about how you can contribute to a successful training experience:

- Answer important emails and return phone calls before the training
- Eliminate distractions by putting your cell phone on silent and logging out of your email and other programs
- Take your own notes during the training session to refer back to after the training is over
- Ask questions during the training if you are unsure how to complete a task
- Avoid multitasking. Concentrate on the training at hand
- Use post-implementation supports, including the recorded training videos and Office Hours

### **MedCompass Naming Conventions**

You can use the document center in MedCompass to upload documents. We've developed naming convention guidelines to ensure documents in MedCompass are named consistently. This document will also be available as a resource in MedCompass (see example below). Please review and save the attached file for more detail.

- **Care Plan Naming:**  
Fiscal Year, member last name, PSP and type (Initial, Annual, Review/Revision, Exit)  
Example: FY21 BenetarPSPAnnual
- **Cost Plan Naming:**  
Fiscal Year, member last name.  
Example: FY21 Benetar
- **Action Plan Naming:**  
Fiscal Year, member last name, PSP and type, Objective Description as entered on Care Plan  
Example: FY21 BenetarPSPAnnual Community Orientation
- **Documents:**  
Any documents uploaded must include date in YYYY.MM.DD format followed by member's name, followed by document description.

Example: 2020.11.10 Benetar Psychological Report

- Shared Calendar Appointments:

Provider Agency Name, checking out AssessmentName, Assessment Type (Initial, Annual, Review/Revision, Exit) YYYY, Start Time – End Time.

Example: Aware, checking out PSPInitial2021

## **Onboarding for Guardians, Advocates, and Self-Direct Employers**

On January 19, 2021, an email was sent out to all Case Managers regarding their roles in coordinating and validating access to MedCompass for Guardians, Self Direct Employers, and Advocates. Case Managers will submit MedCompass access forms and any necessary documentation, including valid releases of information to their Regional AA to obtain MedCompass access for Guardians, Self Direct Employers and Advocates. Recorded Trainings and training manuals will be available to support Guardians, Self Direct Employers and Advocates with the transition to MedCompass. Additionally, DDP has identified Regional staff that will be available to support Guardians, Self Direct Employers and Advocates with any assistance they need in navigating MedCompass:

Region I - Bonnie Markle, Quality Improvement Specialist, [bmarkle@mt.gov](mailto:bmarkle@mt.gov), 808-7089

Region II - Karla Gilles, Quality Improvement Specialist, [Karla.Gilles@mt.gov](mailto:Karla.Gilles@mt.gov), 454-6097

Region III - Troy Kelly, Quality Improvement Specialist, [TroyKelly@mt.gov](mailto:TroyKelly@mt.gov), 655-7680

Region IV - Marie Amundson, Case Management Supervisor, [maamundson@mt.gov](mailto:maamundson@mt.gov), 444-1485

Region V - Jennifer Conners, Quality Improvement Specialist, [jconners@mt.gov](mailto:jconners@mt.gov), 329-5430

The original email and detailed process is posted to the website. You can access it here:

<https://dphhs.mt.gov/Portals/85/dsd/documents/DDP/MedCompass%20Care%20Management%20System/GuardianSelfDirectEmployerandAdvocateAccessToMedCompass.pdf>  
[[nam12.safelinks.protection.outlook.com](#)] [[nam12.safelinks.protection.outlook.com](#)]

## **Overview of Upcoming Milestones and Dates**

As a reminder, here are important upcoming milestones to prepare us for go – live for February 16, 2021:

Milestone	Dates
Complete User Acceptance Testing (Validation)	Completed
Initial draft of the User Security Configuration Spreadsheet verified by providers	Completed
Focus on System Readiness, completion of critical issues	Now-Go-Live
MedCompass Request Access Forms to be completed for Guardians/Self-Direct Employers/Advocates requesting access to members information in MedCompass	Completed

Milestone	Dates
Last Day for Entering New DDP/Part C/FES Members into AWACS	Completed
Second draft of the User Security Configuration Spreadsheet verified by providers	Completed
Last Day for AWACS Changes and Additions (ICP, EI, etc.)	Completed
Notifications sent to Guardians/Self-Direct Employers/Advocates to active their accounts	Completed
Conduct ServiceNOW Training	February 11, 2021
Conduct Training	February 1-February 12, 2021
Release 1 Implementation	February 16, 2021
Office Hours	February 16, 2021-TBD

Remember to check the MedCompass website for up to date information about the MedCompass project: <https://dphhs.mt.gov/dsd/developmentaldisabilities/medcompasscaremanagementsystem/organizationalchangemanagementmaterials> [nam1 2.safelinks.protection.outlook.com] [nam1 2.safelinks.protection.outlook.com].

## Q&A Corner

Question	Answer
<p>I have reviewed my caseload in Medcompass; there are numerous errors, people who aren't eligible for services, a deceased person, people on other people's caseloads and a person I have never heard of.</p> <p>Do I need to do anything before we go live so that I am starting with a correct caseload?</p>	<p>The view you see in MedCompass is the testing environment and not MedCompass production environment. No one has access to MedCompass production yet. We know UAT caseloads are not accurate. We aren't sure if CM supervisors will have access to production prior to go-live or not.</p>
<p>Is this the only training we will receive before go live?</p>	<p>We will be posting a clean recording of the end to end training in CDS. We will also be posting recorded segments of individual processes for easier access.</p>
<p>Will PSP's, Healthcare Checklists, Smull Assessments be available for April's PSP's on February 16<sup>th</sup>?</p>	<p>We have requested that Case Managers open the assessments during the week of February 15<sup>th</sup>, by the end of the week at the latest.</p>
<p>When will the Help Manual be available?</p>	<p>The written training manuals will be available in MedCompass on February 16<sup>th</sup>.</p>
<p>Our management staff has all signed up for the MPATH trainings and have received their login credentials. We have not had our direct care staff sign up for anything, as we weren't sure if this</p>	<p>By the end of the day on February 12<sup>th</sup>, we expect that users who were not registered for training, will be sent their ICAP log in credentials. Users who registered for the</p>

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Question	Answer
<p>training was appropriate given their access and job duties. Will they still receive all their login information and will it be closer to the “go live” date?</p>	<p>training and therefore have access to the training portal, will maintain access to the training portal for some time after go-live. Access to MedCompass production will be given on February 16<sup>th</sup>.</p>
<p>How long will we have access to the training portal? Is it possible to adjust the training portal so it looks like what a direct care staff would have access to?</p>	<p>There are several different issues that may be impacting a user’s ability to log in, including users using saved passwords in their browser or the activation process not being fully completed.</p>
<p>I registered for training and have tried and am still not able to get into my account. I had started and got as far as setting up the password but when I tried to use it I am told it is incorrect? Then I tried to reset it and it states I have no security questions assigned to reset or the account has been locked?</p>	<p>Additionally, If the user is locked out for failed logins the account is locked for 30 minutes – the password reset function does not work until after that time. If you email the helpdesk for a password reset you should not attempt to reset the password via self-service prior to receiving a reply.</p>

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If you have a question, please email [mtdphscaremgmt@pubknow.com](mailto:mtdphscaremgmt@pubknow.com) and I will answer it in an upcoming email.

Thanks!  
Lindsey

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