PDPM Analyzer

Webinar September 12th, 2019

PDPM Analyzer Overview

The PDPM Analyzer is a tool designed to allow users to analyze the HIPPS Codes related to PDPM. The PDPM Analyzer will display each day of the resident's Medicare (A) stay, the HIPPS codes associated with those days, the Modifier codes, the rates for each component of the HIPPS Code, the variable per diem adjustment factors for the individual components, the total rates for each component, the average for each day, the total reimbursement rate for each day and for the entire stay. There is an average daily rate as well as a Summary of all residents for the entire facility.

Assessments for Medicare Advantage (A) residents will appear on the PDPM Analyzer if users calculate a PDPM HIPPS Code for them on the MDS.

Users will only see completed assessments on the PDPM Analyzer that have a HIPPS Code associated with them. Users will not see RUGs, nor will they see Held assessments.

The PDPM Analyzer is going to derive data directly from the MDS and populate Start and End Dates based on a combination of the MDS and the charting of ending words for Medicare stays (Non-Covered Days, Discharged Days, payer changes, etc.). The Accounts Receivable module will calculate reimbursement rates based on the HIPPS Codes on the PDPM Analyzer, rather than write-backs/entries, which is different under PDPM.

The variable per diem adjustment factors *will* be applied to the rates displayed within the PDPM Analyzer so users can get an idea of reimbursement for each resident.

Additional adjustments done by Medicare, to include VBP and 2% Sequestration, will only be factored into the calculating screens when using our Accounts Receivable module.

Using the PDPM Analyzer

In the 10.0.8 and 9.0.9.8 updates that provided the PDPM Analyzer, access buttons were sent along with the PDPM HIPPS Code topic. These buttons should be copied and pasted into the appropriate access screens so that the PDPM Analyzer can be utilized via access navigation.

If users are not utilizing an access button, go to **American Data – ECS>View>PDPM Analyzer**.

1. On the Name Selection screen, filter for **Active** Names and the appropriate Site/Service.
    a. This may need to include Inactive names once users begin to review the PDPM Analyzer for prior periods, but that is not necessary at this time.
2. Click **Select All** to select all residents or select individual name(s) to view.
3. Click **OK**.
4. Click **Go**.

5. When the screen displays, the details for the first name in the list will be displayed in the Rate Details area on the right side of the screen and the first name will be highlighted on the left.

PDPM Analyzer Screen

The PDPM Analyzer screen is broken down into two areas; the Medicare Stay on the left and associated Rate Details on the right.

Medicare Stay

The left side of the screen, called the **Medicare Stay**, will display the dates of a Medicare Stay for the resident. There may be multiple lines here.
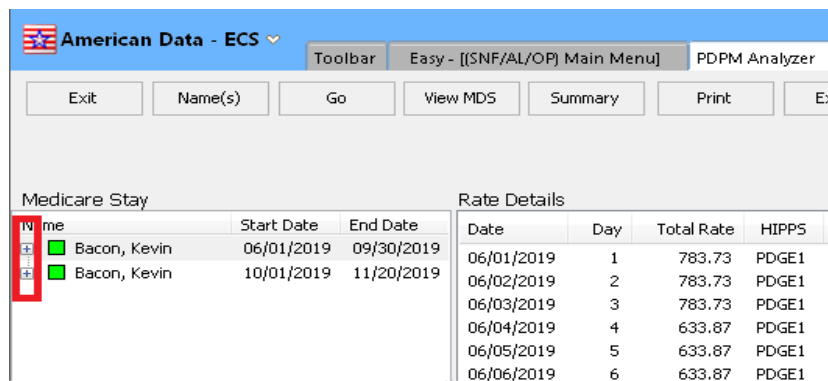
The Start Date will be the start of their Medicare Stay and the End Date will be last day of their stay.

- These dates are populated by dates found in Section A of the MDS.

Users will see one line per stay, rather than one line per assessment.
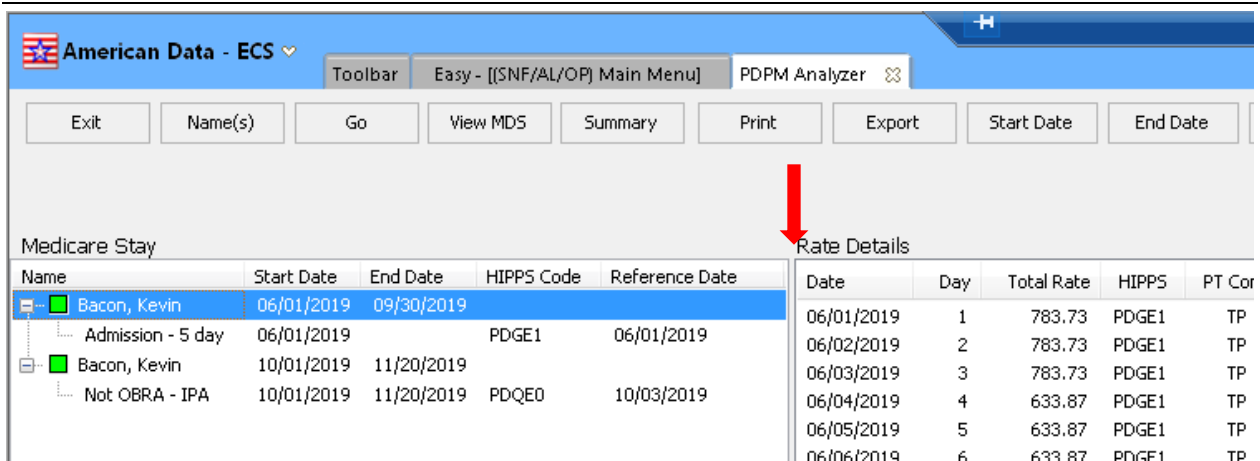
- If users have submitted an MDS with HIPPS Codes that have Start Dates prior to 10/01/2019, they will automatically see a 09/30/2019 end date.
- Users will also see a separate line related to the HIPPS Code that is generated on the IPA for 10/01/2019.

To see additional details related to the **Medicare Stay** area on the left, users may expand each line by clicking on the **+** next to the resident's name. This will display each assessment associated with that stay.

Users may click and drag the line that separates the **Medicare Stay** panel from the **Rate Details** panel to display additional information. Additional information visible will include the HIPPS Code for that MDS and the Assessment Reference Date for each MDS.

Rate Details

The **Rate Details** area will display each date of the stay in the first column, which day of the stay it is, the Total Rate for that day, the actual HIPPS Code, the base rate for each component, the adjustment factor for each component, and the adjusted rate for each component. The Total Rate in column 3 is the sum of all the Adjusted Rate columns together.

By default, the first person in the list will be highlighted. To see the rate details for another name, click a name/stay on the left.

- The **Date** column shows each individual date of the stay.
- The **Day** column shows which day of the stay is counted.
  - An X in the Day column indicates a Non-Billable day. This could be because it is a Non-Covered Day, a Discharged Day, or a change in payer. No rates are associated with this day.
  - If users see multiple X's at the end of a stay and no End Date in the Medicare Stay area on the left, this is because charting was updated to reflect an Occupancy Status of Discharged or payer change for example, but the PPS Discharge Assessment has not yet been completed.
  - Medicare Replacement plans do not require a Discharge Assessment to be completed. Users will not see an End Date for Medicare Replacement names (although users will see X on the right when they chart an Occupancy Status of Discharged or a new Payer Source.)
- The **Total Rate** column displays the reimbursement total (if rates have been entered in Charge Master.)
- The **Average Rate** column (coming in the next update) displays the average daily rate.
- The **HIPPS** column will display the HIPPS Code and Modifier Code combined.
- The columns to the right will then display 4 columns for each **component** of the HIPPS Code:
  - The **Component** column will display the actual component.
  - The **Rate** column will display the full rate for that component.
  - The **Adj**. column will display the adjustment factor based on what day of their stay they are on.
  - The **Adj. Rate** column will display the adjusted rate. If the Adj. column is something other than 1.00, the Adj. Rate will be different than the Rate column.

If there is no End Date for the stay, ECS will continue to count out 100 days.

Summary

The Summary area of the PDPM Analyzer will display the Start and End date for each resident, the total days for each stay, and the total rate and average rate for each stay. If a name is displayed multiple times on the Rate Details screen, due to multiple stays, they will be displayed multiple times on the Summary as well. The Summary will provide a Grand Total of days for the selected names, rates, and an average of the total rates.

Summary

Name	Start Date	End Date	Total Days	Total Rate	Average Rate
Adams, John	10/08/2019	/ /	100	54564.35	545.64
Adams, Suzanne C	10/03/2019	11/14/2019	41	23611.24	575.88
Bacon, Kevin	06/01/2019	09/30/2019	100	52722.22	527.22
Bacon, Kevin	10/01/2019	11/19/2019	50	33346.81	666.94
Banderas, Antonio	10/13/2019	/ /	100	67775.32	677.75
Barrymore, Drew	01/04/2020	/ /	100	53036.60	530.37
Edwards, Jack C	10/01/2019	/ /	64	32636.77	509.95
Hancock, John	10/08/2019	/ /	100	55457.20	554.57
Morris, Luke J	10/01/2019	/ /	100	52906.10	529.06
Nixon, Dwight A	09/23/2019	09/30/2019	6	4080.36	680.06
Nixon, Dwight A	10/01/2019	/ /	58	32737.22	564.43
Wetzel, Justin D	05/11/2020	/ /	0	0.00	0.00
Yankee, David H	10/16/2019	/ /	100	54593.66	545.94
Zeik, Sharon B	10/01/2019	/ /	100	66384.00	663.84
Zirbel, Brooke E	10/01/2019	/ /	0	0.00	0.00
Total			1019	583851.85	
Average					572.97

Toolbar

- The **Exit** button will exit users out of the PDPM Analyzer screen.
- The **Names** button will allow users to choose different names to display.
- The **Go** button will run the PDPM Analyzer after names are selected. If a different name is selected, the user must then click Go to refresh the screen.
- The **View MDS** button will allow users to see the MDSs that are associated with the name/stay that they have selected on the left side of the PDPM Analyzer.
- The **Summary** button will take users to the Summary view which displays a summary of dates, days, and dollars for the entire list of names selected. There is also a grand total. This button is only visible when users are on the Details screen.
- The **Details** button will return users to the Rate Details area when they are on the Summary screen. It toggles between Summary and Details depending on what screen they are on.
- The **Print** button will allow users to print the PDPM Analyzer results. Users may print the details or the summary.
    - If users are on the Details page, when they click the Print button, ECS will print the Rate Details for the name that is selected on the Medicare Stay area on the right. Printing the Rate Details may only be done for one name at a time.
    - If users are on the Summary page, when they click the Print button, ECS will print the entire Summary page.
- The **Export** button will allow you to export the PDPM Analyzer results to Excel. Users may export the details or the Summary.
    - If users are on the Details page, when they click Export, ECS will export the Rate Details for the name that is selected on the Medicare Stay area on the right. The file will default to be called PDPM Analyzer. Users may change this name and select the location of where they would like to save the file. The file will default to a Microsoft Excel file format. Exporting the Rate Details may only be done for one name at a time.
    - If users are on the Summary page, when they click Export, ECS will export the entire Summary page. The file will default to be called PDPM Analyzer. Users may change this name and select the location of where they would like to save the file. The file will default to Microsoft Excel file format.
- The **Start Date** button allows users to narrow down the Rate Details area to start on a certain date.
- The **End Date** button allows users to stop the Rate Details area on a certain date. The Start Date and End Date buttons can be used to project reimbursement if a resident were to drop Medicare on a certain day or to see anticipated reimbursement for a period of time.
- The **Horizontal** button will change the display of the screen so that the Medicare stay with the names panel will appear on the top and the Rate Details area will appear on the bottom (rather than split between left/right). Once users click the Horizontal button it will switch to Vertical so they can toggle between views.
- The **Full** button will hide the left panel of names and allow users to see the entire right side of the screen for the selected name. Once the Full button has been selected, it will switch to Split to allow users to return to the split screen.

Since the PDPM Analyzer is tied to the actual MDS, and billing will be tied to the PDPM Analyzer, rather than entries; users will not be able to manually edit entries to change a HIPPS Code.

PDPM Analyzer Setups Required

Setups for the PDPM Analyzer are contained in various places throughout ECS. A combination of Site Settings, User Group Rights, and Rates play a role in utilizing the PDPM Analyzer.

Site Settings

There is a new tab in Site Settings called PDPM Analyzer. This tab is visible only when users select a Site in Site Settings, but not if they select a Service. This tab is used to set up information that is required for correct HIPPS Code write-backs from the MDS, as well as for proper rate adjustment calculations.

If users utilize the Accounts Receivable module of ECS or they keep up their census in ECS, users will want to manually update the PDPM tab's "Select Calendar Event for PDPM Analyzer" area to accurately reflect the words that are charted in the Status topic to reflect non-billable days.

1. Go to **American Data-ECS>Setup>Settings>Site Settings**.
2. Select the appropriate **Site** from the drop-down list.
3. Click the **PDPM** Tab.
4. Click the **Add** button.
5. Click the **Face Sheet** tab and double-click the **NH Status topic** (or the topic that may be named a bit differently but is the equivalent of where users chart the Occupancy Status words).
6. Navigate to the **Occupancy Status** column.
7. Select the words that indicate a day is not billable to a Medicare type payer. Click on the first one, hold the **Ctrl** key on your keyboard, and continue to select words.
   a. Typically, users should select all Occupancy Status words <u>except In-house</u>. Non-Covered (if you have it) and Discharged should be selected.
   b. Continue to select all payer sources that may also stop a Medicare (A) type stay including Medicaid, Medicaid MCO, Self-Pay, etc.
   c. If a facility has Insurances or Managed Care plans that currently reimburse based on Federal RUGs, users would not want to select them until they are certain that these Insurances would not reimburse on HIPPS Codes after 10/01/2019.
8. Click **OK**.
9. Click **Apply**.
   a. If users have multiple sites in their database that have a SNF, they will want to use the "Copy from Site" button. Setups will not automatically be sent for all sites that users may have in their database.
      i. Once users have completed the steps above, select the next **Site**, click the **Copy from Site** button.
      ii. Select the **Site** that users have the updated setups.
      iii. Click **OK**.
      iv. Click **Yes** on the message asking if you are sure?
      v. Repeat this for each Site that has a SNF.
10. Click **OK** on the Site Settings tab when finished.

Note: All of the other PDPM setups included in the Write-back Setup area on this tab should have been included in the update. If your database's Site ID did not match with our default, the Writeback Setup area may not be linked up correctly. Click the **Writeback Setup** button to make sure you don't see Unknown or blank boxes in here. ***Please contact our Clinical or Financial Department for assistance if you see "Unknown" or blanks here.***
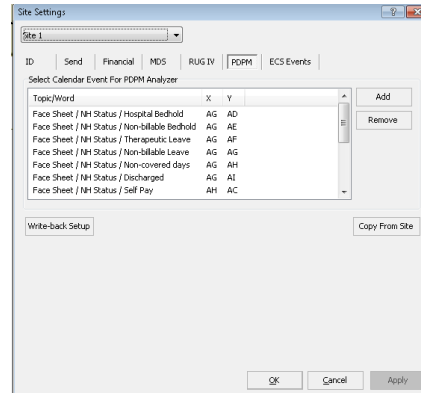
Access Buttons for linking to the PDPM Analyzer

An access button linked to the PDPM Analyzer will be helpful to many staff in your organization. American Data recommends at minimum placing one on the MDS Coordinator's Main Access Screen, as well as on the appropriate billing screens within the Financial Access tab. For example, on the Medicare (A) Billing Access Screen.

1. Click the **Setup** icon on your toolbar.
2. Click the **MDS** (or may be called MDS 3.0) tab.
3. **Double-click** on the **PDPM HIPPS Code** topic.
4. Scroll all the way to the right and down a bit until you see access buttons.
5. **Right-click** on the **PDPM Analyzer** button and select **Copy**.
6. Click the **Financial Access** tab.
7. Double-click on your **Medicare (A) Billing** topic.
8. **Right-click** in a blank space and choose **Paste**.
9. Click the **x** on the Setup Topics/Words tab to close the setup screen.

Follow these instructions for pasting an access button linked to the PDPM Analyzer onto any appropriate access screen.

User Group Rights

In the update for version 10.0.8 and 9.0.9.8, a utility was run so that any users who have rights to **View>MDS 3.0 Assessment>View MDS** would also be given access to View>PDPM Analyzer. Facilities may remove access to PDPM Analyzer in the user group settings if they choose by adjusting a particular user group's rights.

To adjust the User Group Rights for PDPM Analyzer

1. Go to **American Data – ECS>Setup>Security>User Group**.
2. Double-click the User Group that you'd like to adjust rights for.

3. Click the **>** next to **View**.
4. **Check** or **un-check** the option for **PDPM Analyzer** here.
5. Click **OK**.

Regarding User Group rights, if the Accounts Receivable staff do not already have rights to **View>MDS**, it is recommended that they have these rights as well. They will absolutely need rights to PDPM Analyzer, as this will be part of their month end billing cycle. These rights will give them access to View MDS, but not to start or change an MDS.

To adjust the User Group Rights for View MDS

1. Go to **American Data – ECS>Setup>Security>User Group**.
2. Double-click the User Group that you'd like to adjust rights for.
3. Click the **>** next to **View**.
4. Click the > next to **MDS 3.0 Assessment**.
5. Place a green checkmark in the **View MDS** and **View Status** items.
6. Click **OK**.

To adjust the User Group Rights for Charge Master Tasks
Charge Master tasks were included in the update to allow all clients to enter PDPM rates into ECS.

1. Go to **American Data – ECS>Setup>Security>User Group**.
2. Double-click the User Group that you'd like to adjust rights for.
3. Click the **>** next to **Setup**.
4. Place a green checkmark in the **Charge Master** item.
5. Click **OK**.

Rates
Rates must be entered in the Charge Master for users to see the rate information on the PDPM Analyzer.

Please see the handouts specific to entering rates for additional information.

Troubleshooting the PDPM Analyzer
If users are not seeing what they expect on the PDPM Analyzer there are some troubleshooting tips to follow:

If you are seeing different PDPM HIPPS Codes than you think you should see:
Select the resident's name and click the **View MDS** button on the toolbar. The View MDS button will display the MDSs that are appearing on the PDPM Analyzer. Each one will open in its own tab so that users may look at the details of the MDS.

If you have entered rates but are not seeing them on the PDPM Analyzer:
This may mean that the Site Settings setups that were merged over in the April update did not match with setups in your database. Please check your Site Settings>PDPM tab>Writeback Setups button to make sure this information is filled in and does not say "unknown" or is not blank.

If you are seeing X on the Rate Details area rather than Billable Days:

This means that the PDPM Analyzer thinks this is a non-billable day. This is based on the charting in the Status Topic and works based on the Site Settings for Non-Covered days. Check the Calendar reports to confirm this resident does not have the wrong payer source charted, or a Non-Covered Day, or Discharge Day charted.