

672 & 802

View/Print Survey Reports - 672

Information can be pulled into the 672 Survey Report from the most recently submitted MDS as well as from charting within ECS.

1. From the MDS/Resident Care Coordinator Access screen, click **672 Census & Condition**.
2. Click the **Name(s)** button, highlight the resident name(s), and click **OK**.
3. Click **Refresh** first if you plan to make changes or viewing the information and verifying it. After clicking Refresh, red boxes will appear for any information that has changed.
4. An Audit Results screen will appear to show any errors and show questions that need to be coded manually. Click **Close**. (To see these audit results again, click on the Errors button.)
5. The report will load.
 - The information in these reports is pulling directly from either the last submitted MDS assessment for each resident OR directly from charting (if setup manually).
 - To manually change the report, double-click on the desired cell containing the information to be changed. On the 672, double-clicking on a cell will enter or remove the X in the cell.
 - Utilize the Workspace Editor on the right-hand side of the screen to see where the current data is populating from vs. any prior data. Column Description will detail the specifications for that column as well as the MDS crosswalk as to where that data is found. To see the information that is populating into that cell, click onto **Show Source**. This will either load a view screen (for charted data) or the MDS.
6. Click **Print** to print the report. This will load the form which is requested by surveyors. Click **Print Trigger List** to see which residents fall into each category.
7. Click **Exit** to return to the Access menu. A message will appear: "Save Changes?" Choose **Yes**, **No**, or **Cancel**. If **Yes** is chosen, the current answers will remain until Refresh is clicked onto or the report is manually edited and saved.

View/Print Survey Reports - 802

Information can be pulled to the 802 Survey Report from the most recently submitted ECS as well as from charting within ECS.

1. From the MDS/Resident Care Coordinator Access screen, click **802 Roster/Sample Matrix**.
2. Click the **Name(s)** button, highlight the resident name(s), and click **OK**.

3. Click **Refresh** first if you plan to make changes or viewing the information and verifying it. After clicking Refresh, red boxes will appear for any information that has changed.
4. An Audit Results screen will appear to show any errors and show questions that need to be coded manually. Click **Close**. (To see these audit results again, click on the Errors button.)
5. The report will load.
 - The information in these reports is pulling directly from either the last submitted MDS assessment for each resident OR directly from charting (if setup manually).
 - To manually change the report, single-click on the desired cell containing the information to be changed. The Workspace Editor on the right-hand side of the screen will load. In here, check or uncheck boxes to make manual changes to that field.
 - Utilize the Workspace Editor on the right-hand side of the screen to see where the current data is populating from vs. any prior data. Column Description will detail the specifications for that column as well as the MDS crosswalk as to where that data is found. To see the information that is populating into that cell, click onto **Show Source**. This will either load a view screen (for charted data) or the MDS.
 - On the 802, the Sort button can be used to sort the residents by Resident Name, Resident Number, or Resident Room.
6. Click **Print** to print the report.
7. Click **Exit** to return to the Access menu. A message will appear: "Save Changes?" Choose **Yes**, **No**, or **Cancel**. If Yes is chosen, the current answers will remain until another MDS assessment is submitted or the report is edited and saved.