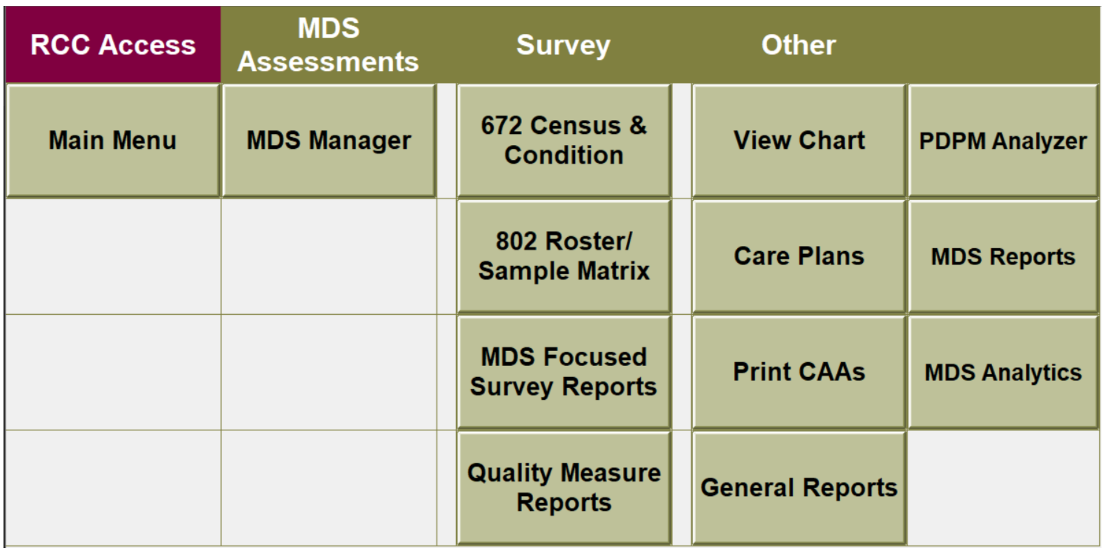
MDS/Resident Care Coordinator

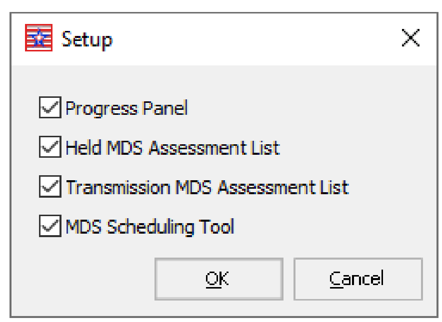
MDS Manager

1. From the MDS/Resident Care Coordinator Access screen, click MDS Manager.
2. The MDS Manager will open and display pertinent information for all residents who have had an assessment within the past 120 days.



MDS Manager Screen Description

The MDS Manager is made up of several options across the top, as well as four informational panels (Progress Panel, Held Assessments Panel, Transmit Manager Panel, & Scheduling Tool Panel).

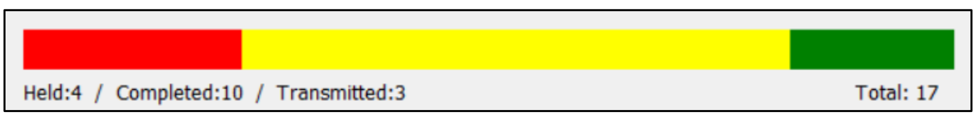


- Setup – Controls which data panels are displayed when you use the Manager. Each user can control this setting for themselves, and make changes as needed. ECS remembers your most recent setting.
- Message – Allows you to write an Internal Communication message to users that will appear in their Message list.
- Chat – This opens the Chat box to allow you to communicate with other users currently logged into ECS.
- IPA Predictor – Provides clinical decision support for IPA completion with precise feedback on whether and how much your facility will benefit regarding CMI and dollars. See supplemental IPA Tools handout for more information and detailed instructions.
- IPA Forecast – Allows you to review resident data to determine who may qualify for an IPA. It displays the resident's therapy and nursing function score for each day in the

selected date range, based on caregiver documentation. See supplemental IPA Tools handout for more information and detailed instructions.

- PPS Analyzer – This option opens the PPS PDPM Analyzer in which users can analyze all codes that are generated from a PPS assessment. The analyzer will show each HIPPS code, the total rate, average rate, and a breakdown of all components.
- OBRA Analyzer - This option opens the OBRA PDPM Analyzer in which users can analyze all codes that are generated from an OBRA assessment. The analyzer will show each HIPPS code, the total rate, average rate, and a breakdown of all components.
- MDS Analytics – This option opens the MDS Analytics reporting screen. There are new reports being added to this list frequently, but the current options consist of Length of Stay, Diagnosis Totals, Medicare Days, Nursing Components (PDPM), NTA Points (PDPM), Facility Assessment, and Certificate of Need.
- Names – Choose different names than the current selection. Used for trouble-shooting specific names or situations.
- Restore Names – If you used the "Names" button to select specific residents, the "Restore Names" button will revert the Manager back to the filter settings used when the Manager was opened.
- Refresh – Clicking Refresh updates the Manager with changes to MDS assessments that were made since the previous refresh or since the Manager was loaded – whichever is more recent. The last date and time the MDS Manager were refreshed will display to the right of Refresh.

Progress Panel

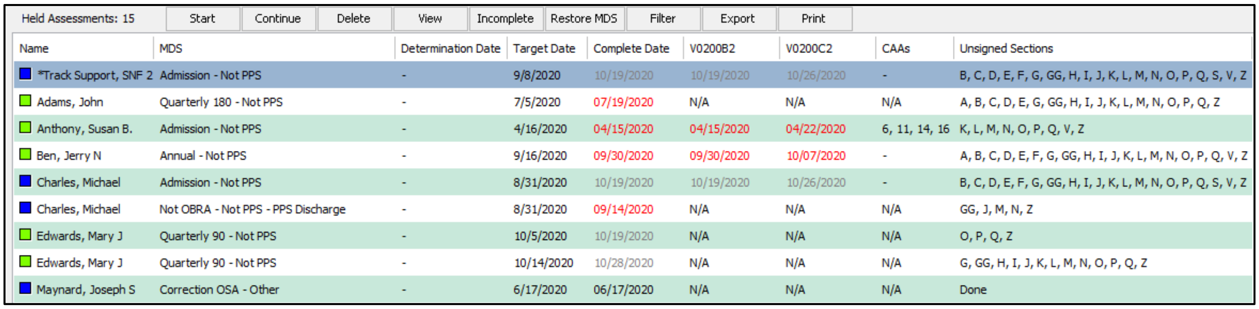


This displays the total number of assessments that are currently being worked on. The progress bar consists of three-color coded categories, described below:

- Held (red) – The number of records that have been started but have not been completed.
- Completed (yellow) – The number of records that have been completed but have not been batched (Transmission Count = 0).
- Transmitted (green) – The number of records that have been batched (Transmission Count > 0) but have not been marked as "Accepted."

Held Assessments Panel

This lists all the assessments that are currently in progress. The menu options allow you to manage and work on these assessments as needed.

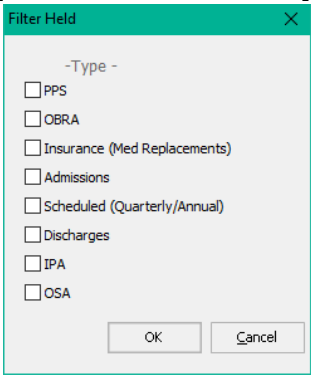


Held Assessments: 15 | Start | Continue | Delete | View | Incomplete | Restore MDS | Filter | Export | Print

Name	MDS	Determination Date	Target Date	Complete Date	V0200B2	V0200C2	CAAs	Unsigned Sections
*Track Support, SNF 2	Admission - Not PPS	-	9/8/2020	10/19/2020	10/19/2020	10/26/2020	-	B, C, D, E, F, G, GG, H, I, J, K, L, M, N, O, P, Q, S, V, Z
Adams, John	Quarterly 180 - Not PPS	-	7/5/2020	07/19/2020	N/A	N/A	N/A	A, B, C, D, E, G, GG, H, I, J, K, L, M, N, O, P, Q, Z
Anthony, Susan B.	Admission - Not PPS	-	4/16/2020	04/15/2020	04/15/2020	04/22/2020	6, 11, 14, 16	K, L, M, N, O, P, Q, V, Z
Ben, Jerry N	Annual - Not PPS	-	9/16/2020	09/30/2020	09/30/2020	10/07/2020	-	A, B, C, D, E, F, G, GG, H, I, J, K, L, M, N, O, P, Q, V, Z
Charles, Michael	Admission - Not PPS	-	8/31/2020	10/19/2020	10/19/2020	10/26/2020	-	B, C, D, E, F, G, GG, H, I, J, K, L, M, N, O, P, Q, S, V, Z
Charles, Michael	Not OBRA - Not PPS - PPS Discharge	-	8/31/2020	09/14/2020	N/A	N/A	N/A	GG, J, M, N, Z
Edwards, Mary J	Quarterly 90 - Not PPS	-	10/5/2020	10/19/2020	N/A	N/A	N/A	O, P, Q, Z
Edwards, Mary J	Quarterly 90 - Not PPS	-	10/14/2020	10/28/2020	N/A	N/A	N/A	G, GG, H, I, J, K, L, M, N, O, P, Q, Z
Maynard, Joseph S	Correction OSA - Other	-	6/17/2020	06/17/2020	N/A	N/A	N/A	Done

Features:

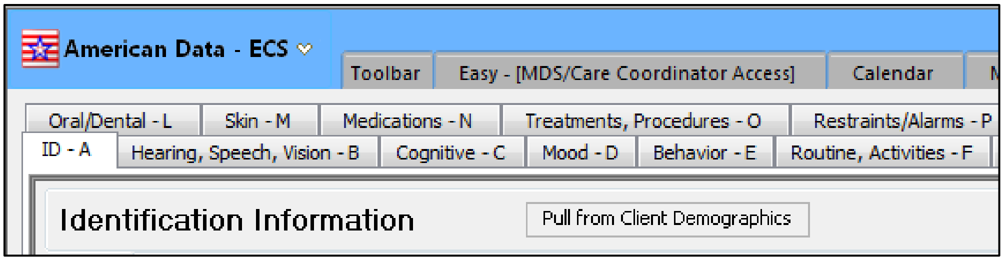
- Click a column heading to sort the listed records by that column.
- When records are deleted, marked as incomplete, or completed using the 'Submit' button on the Status screen of individual records, select the 'Refresh' button at the top of the Manager to remove those from the Held Assessments Panel.
- When you have had the MDS Manager open for a while, you can view changes or progress to assessments by selecting the 'Refresh' button at the top of the Manager.
- Double click a resident's name to display the MDS history for that person.
- The total number of records on the Held Assessment list corresponds to the red bar of the Progress Panel displayed above the Held Assessments Panel.
- The completion date, V0200B2, and V0200C2 columns will display any predicted values in gray or red (if due in the next three days, or past due). Once a date has been filled out on the MDS, it will display in black text. The MDS coordinator may adjust these dates in the Held Assessments section by double clicking onto the date needing to be adjusted. The user is then presented with a calendar to select the appropriate date. If date(s) are adjusted manually directly in the Manager, the user's initials will display behind the date.
- Click Filter to sort the list down to only specific MDS type(s).



Start an MDS

1. From within the MDS Manager, click the **Start** button.
2. Select the resident name and then click **OK**.
3. The Type of Assessment/Tracking Form screen will appear.
   - Select whether the assessment is OBRA/PPS, an Entry Record, or a Discharge/PPS Discharge/Death Record.
   - Enter the target date for the assessment and click **OK.**
4. The Assessment Type screen will appear. Code the assessment appropriately and click **OK**.
   - Transmission Status will default to the third option.
   - The option at the bottom of the screen For Medicare Replacement or Insurance Billing may be checked for those assessments that combine a non-Medicare PPS assessment type with an OBRA required assessment type, or for PPS-only assessment types for non-Medicare residents.

5. The assessment is now open and ready to complete with each section identified by tabs at the top of the screen.



- In section A, click the **Pull from Resident Demographics** button to automatically pull in data from the resident's demographics.
- Click **Collect** and ensure that the calendar is set to the appropriate assessment reference date, then click **OK** and **OK** again. The computer will gather all the appropriate documentation within the clinical record and pull it into the MDS for review. It will also display a blue highlight on the answers that are supported by documentation from the chart
- Click the section to be completed. If an answer has a blue highlight, then the computer has found supporting documentation for that answer. To view the supporting documentation, click the MDS question.
- To save the answers and move to a different section, click **Sign Section**, and select the next desired section using the tabs at the top of the screen.

6. To see the current progress on this assessment, click **Status** at any time.
   - Only the initials of the last person to sign a section will appear in the status screen; however, all signatures and dates are recorded in Section Z.
7. Click **Close** at the bottom of the screen to close the assessment and return to the MDS Manager.
   - A warning will appear: "Unsigned sections will not be saved. Are you sure you want to exit?" This warning will appear every time an assessment is closed. Be sure all the sections you have worked on are signed before you click Yes. Clicking Yes with unsigned changes may result in a loss of data.
8. Miscellaneous information:
   - Questions written in red are PPS items which directly affect the PDPM HIPPS.
   - Questions with a green dot influence the Quality Measures.
   - To display the portion of the RAI Manual that corresponds with an MDS question, click the Help icon at the top of the screen [a ? will be attached to the cursor] then click the MDS question number.
   - Users may choose to use the Notes feature as a communication tool within this assessment. This is useful when more than one person must complete questions in a section, or when an answer is chosen that conflicts with supporting documentation in the chart. Click **Note** at the bottom of the section and type in the note. To review any notes within an assessment, click **Status** and click **Notes**. Users should be trained to review assessment notes frequently.

Notes are saved with the assessment and can be called up after the assessment has been submitted.

- From the Status screen, a user can click on the picklist button to the left of each section to open that section.
- Multiple persons can be working on an assessment at the same time, but only one user can be in the same section at a time.
- More than one assessment may be open at a time. Users should confirm that they are in the intended assessment.
- Questions may be marked as unknown if a user is unable to gather the required data. There are two ways to do this depending on what type of question you are working on.
    - To mark a question as unknown where only one answer can be selected: The answers to this question will have radio buttons (dots) to mark your selection. A checkbox will appear to the left of the answers, below the MDS question box. Clicking on this checkbox will grey out the entire question and will write a dash (-) in the transmission file for this question.
    - To mark a question as unknown where a user can select multiple answers: The answers to this question will have checkboxes to mark your selection. Individual answers can be marked as unknown by clicking twice in each checkbox. The checkbox will fill in solid and will write a dash (-) in the transmission file for this item.
- To review all unknown items in the assessment, click the **Unknown** button at the bottom of the screen.
- To remove an answer from an item that is answered with radio buttons (dots), click the word next to the dot.
- Utilize the **Zoom** feature in the lower right-hand corner to zoom in on the screen. The MDS assessment will remain at that zoomed in level until it is closed out and reopened.

Continue an MDS in Progress

1. From within the MDS Manager, highlight a resident's MDS and click the **Continue** button.
2. The status screen will automatically appear. Review this screen to see which sections still need to be completed.
3. If the notes feature is being used, click **Notes** to review any notes that may have been written.
4. Click **Close** to hide the Status screen.
5. The assessment is ready to work on with each section identified by tabs at the top of the screen.
    - Click the section to be completed. If an answer has a blue highlight, then the computer has found supporting documentation for that answer. To view the supporting documentation, click the MDS question.

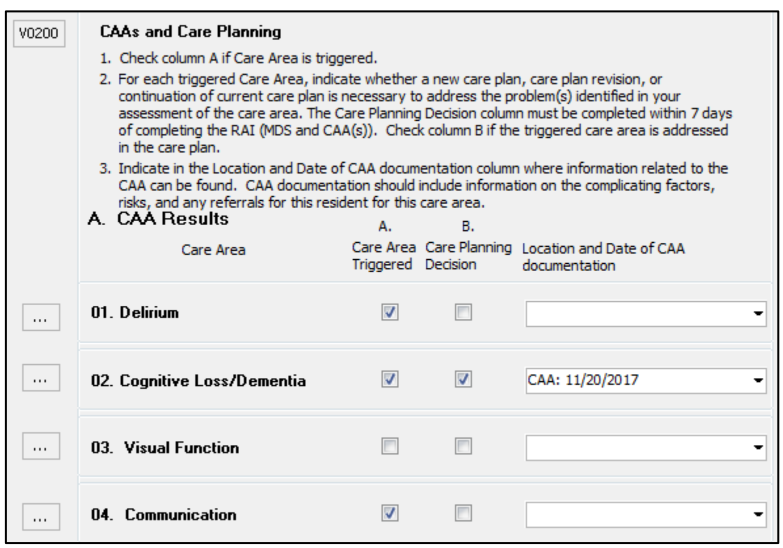
- To save the answers and move to a different section, click **Sign Section,** and select the next desired section using the tabs at the top of the screen.

6. To see the assessment's current progress, click **Status** at any time.
   - Only the initials of the last person to sign a section will appear in the status screen, however all signatures and dates are recorded in Section Z.
7. Click **Close** to close the assessment and return to the MDS Manager.
   - A warning will appear, "Unsigned sections will not be saved. Are you sure you want to exit?". This warning will appear every time an assessment is closed. Be sure all the sections you have worked on are signed before you click **Yes**. Clicking Yes with unsigned changes to the assessment may result in a loss of data.

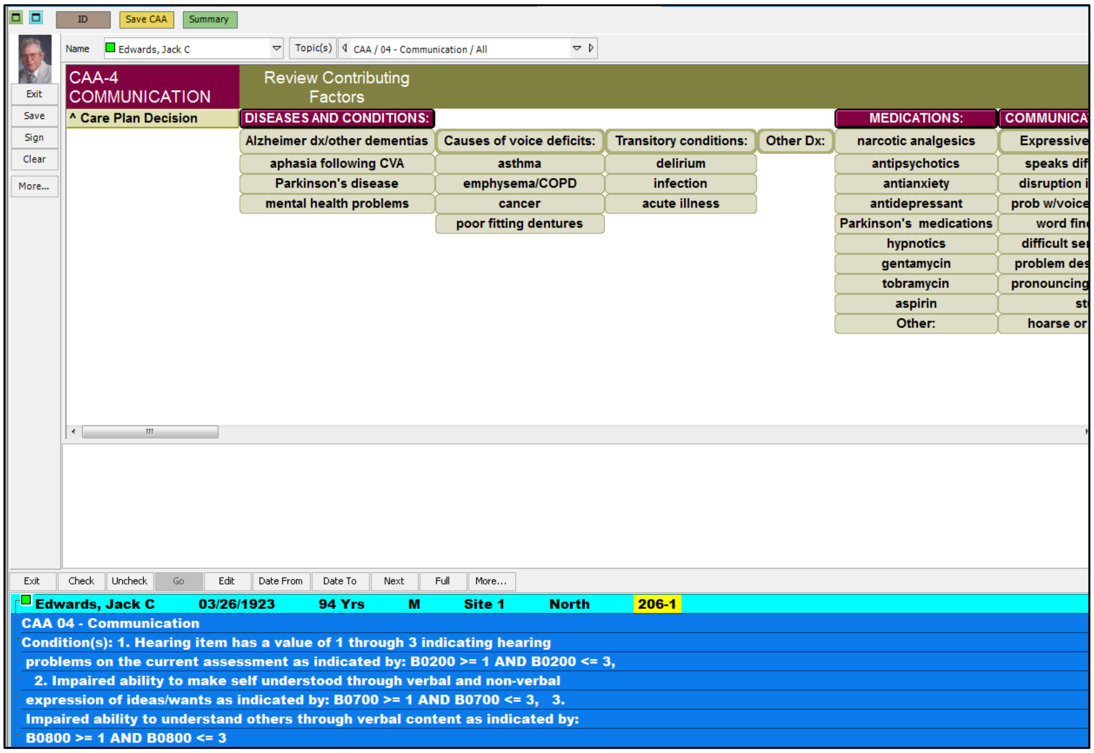
Complete a CAA

(The CAA may be completed before or after submitting the MDS, depending on your Site Settings. CAAs must be accessed through the MDS assessment form.)

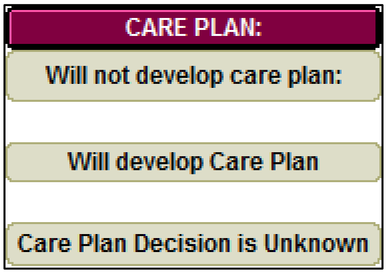
1. From within the MDS Manager, highlight a resident's MDS and click the **Continue** button.
2. The status screen will automatically appear. Select Section V and scroll down to V0200 to view which CAAs triggered.
   - Any CAAs that have triggered will display a checkmark in the box in Column A. If the CAA has already been completed, there will be a checkmark in the corresponding box in column B. The location and date of any selected supporting documentation will be displayed by clicking the drop-down arrow in the corresponding box under the Location and Date of the CAA Information column.
3. To complete a CAA, click in the corresponding picklist box ... to the left of the CAA number.
4. The CAA screen will load. This is a split screen with three main sections:
   - The top screen will contain a library of pertinent items to consider when assessing the care area. This area will be used as a guide for assessment and when writing the CAA note.
   - The middle (blank) portion of the screen is where the CAA note will be written.



- The bottom screen is a view screen used for reviewing information which may pertain to this CAA.



5. Review the entries in the view screen by clicking the small green Maximize View icon in the upper left of the screen. The information in the blue header will display the corresponding MDS questions and answers that caused this CAA to trigger. The information below the blue header contains entries from the clinical record. Review the clinical information and tag pertinent entries by clicking on the small box to the left of the desired entry to turn it green. All entries tagged green will be included as supporting documentation for this CAA. The tagged entries will automatically print with the CAA, and their location and date will appear in the CAA Summary area in Section V. Click the green Maximize View icon again to reduce the view screen to its original size.
6. Next, document the remainder of the CAA note. Complete the note by working from left to right in the Write screen. The last question words will be the Care Plan Decision and Referral. One of the Care Plan Decision words is *required* to complete the CAA Summary Form; the user **must** choose one of the following words:



7. When the CAA note is completed, click **Save**, then click the **Save CAA** icon at the top of the screen. To view a Summary of the CAA, click the **Summary** icon at the top of the screen. Click **Exit** when completed viewing the summary of your CAA.

8. If you wish to document a Care Plan, click the topic forward arrow to the right of the Topic window, or the dropdown arrow in the Topic widow, to select from the Care Plans listed:
9. When finished, click **Exit** on the left of the screen. A box may pop up warning that there are more Topics to go through. Click **Yes** to return to Section V.
10. To document a different CAA, click the picklist box to the left of it and repeat the steps outlined above. To exit out of Section V, click **Sign Section** at the bottom to save the checkmarks in column B.
11. Click **Close** to return to the Access menu.

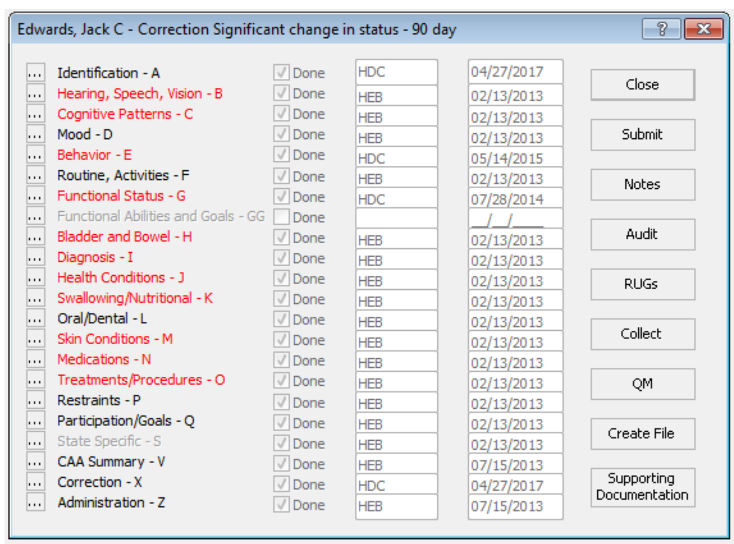
Edit a CAA

1. In a CAA Write screen, click the green maximize view icon to enlarge the CAA review screen.
2. Scroll down to review all the tagged (green highlighted and checked) entries that constitute the CAA. Uncheck any entries that you do not wish to include in the CAA.
3. The documented CAA note will appear at the bottom of the CAA review screen in green. Uncheck the box to the left of this note to remove it from the CAA. Right click the CAA note and select **Discontinue and Copy**. A box will pop up asking "Are you sure you want to DC selected entry?" Click **Yes**.
4. A copy of the CAA note will appear. Make the appropriate changes to the copied note.
5. Click **Save** and **Save CAA,** then click **Exit**.

Submit an MDS in ECS

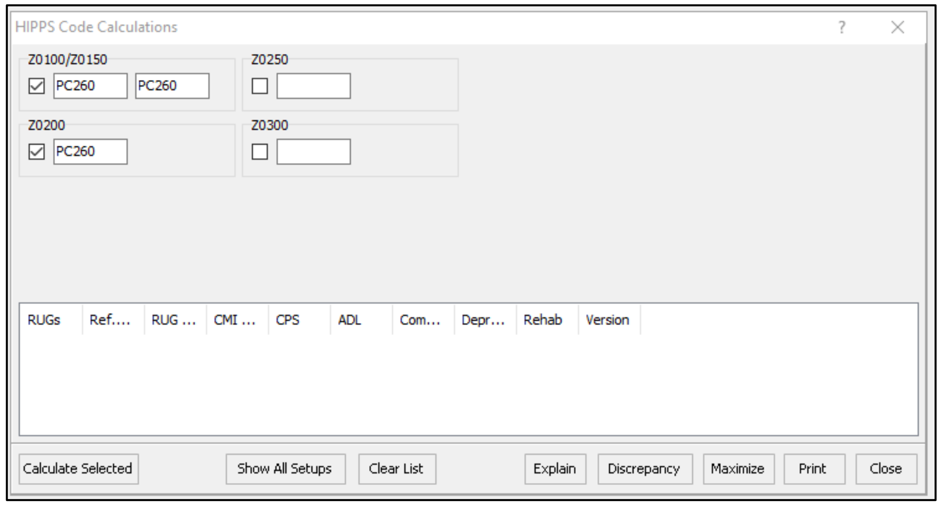
(Submitting an MDS in ECS is "closing" the assessment. THIS IS NOT TRANSMITTING THE ASSESSMENT TO THE STATE.)

1. From within the MDS Manager, highlight a resident's MDS and click the **Continue** button.
2. The status screen will automatically appear. Review the Status screen to make sure all required sections are signed.
3. If the notes feature is being used, click **Notes** to review any notes that may have been written.
4. Click **Audit** to run a check on your assessment for any possible problems. ECS will search for contraindications, blanks, fatal errors, and any MDS scrubber warnings. When the audit is complete the



results will appear. Review the results, make any necessary changes to the assessment, and click **Sign Section** to save.

5. Next, under Status click **HIPPS Code**. The HIPPS Code calculation screen will appear.



    - Assure that the desired Z items to be calculated are checked, and then click the **Calculate Selected** button at the bottom of the screen.
    - **Show All Setups** will display the site settings for calculation details for Z0100 through Z0250. These settings may be changed through the path File/Setup/Settings/Site Settings.
    - **Clear List** will clear the calculated scores from the display.
    - When a HIPPS Code is highlighted, **Explain** will display the logic for the selected scores.
    - To print HIPPS Codes along with billing information:
        - Click **Print** at the bottom of the screen and click **OK**.
        - Click **Print** again, verify your printer selection, and then click **OK**.
    - Click **Cancel** to hide the Print screen.
6. The assessment is now ready to submit. Click **Submit** (or **CAAs Done**). A box will pop up and ask, "Submit assessment and check for errors?" Click **Yes**.
    - If the computer found fatal errors, a list of the errors will display. Click **Fix Errors** to return to the assessment and make the desired changes. When errors are fixed, click **Sign Section** to save, and repeat the submission process.
    - If no fatal errors were found the assessment will submit and close upon completion. If there are fatal errors remaining, the list will be displayed again. Click **Ignore** to continue submitting the assessment; however, fatal errors in the ECS Audit may result in fatal errors upon electronic transmission.
    - During the submission process, the status bar at the bottom of the assessment screen will indicate the progress of the MDS writebacks. The MDS answers and calculated HIPPS scores will automatically write back to the MDS 3.0 tab of the chart. These writebacks are necessary for utilization of the MDS information in other areas of the clinical record.

Delete an Assessment

1. From within the MDS Manager, highlight a resident's MDS and click onto the **Delete** button.

2. A warning will appear asking Delete assessment (assessment name and date)? Click **Yes** to delete.

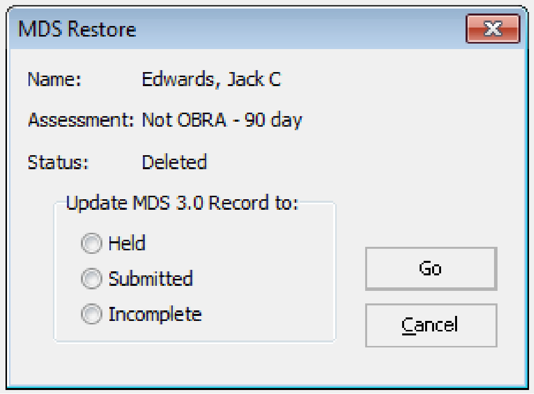
View or Print an MDS

1. From within the MDS Manager, highlight a resident's MDS and click onto the **View** button.
2. To print the assessment, click the **Print** button at the bottom of the Assessment. Verify sections to print and click **OK**.
3. The user may choose the pages/sections they wish to print by checking the appropriate boxes, then select **OK**.
4. Click **Close** to return to the Access menu.

Save an Assessment as Incomplete

1. From within the MDS Manager, highlight a resident's MDS and click onto the **Incomplete** button.
2. A box will pop up: "Please enter reason why assessment is incomplete." Type in a brief explanation and click **OK** (to cancel and keep the original status, click Cancel).
3. The Assessment is now closed, and the status is Incomplete. It can only be opened to View.
4. The reason for making the assessment incomplete may be accessed in the Notes. Open the assessment to View, click Status, then click Notes. The reason appears at the bottom of the Section Notes screen.

Recover a Deleted or Incomplete Assessment



1. From within the MDS Manager and click onto the **Restore MDS** button.
2. Select the desired resident from the name selection screen and click **OK**.
3. Select the assessment to be restored and click **OK**.
4. Select what status to save the assessment to
   - Held: Assessment in progress
   - Submitted: Closed/completed assessment
   - Incomplete: An MDS that will not be completed for submission
5. Click **Go**.

Transmit Manager Panel

By default, this panel lists all assessments that have been completed, but have not yet been marked as "Accepted."

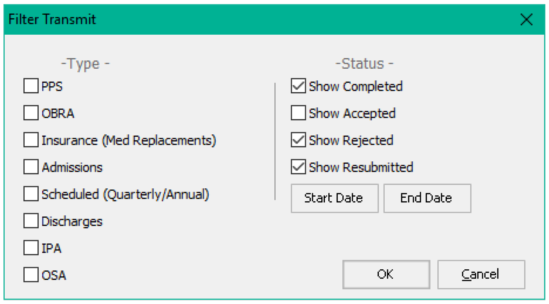
Transmit Manager: 22 | Change | Correct | Delete | View | Transmit | Filter | Accept All | Export | Print

Name	MDS	Target Date	Complete Date	V0200B2	V0200C2	Transmit Date	Status	Z0100	Z0200	Transmit
Jefferson, Thomas	Correction(I) Not OBRA - 5 day	01/22/2021	01/29/2021	/ /	/ /	02/12/2021	Completed	KGNC1	-	1
Adams, John	Not OBRA - 5 day	11/17/2020	11/30/2020	/ /	/ /	-	Accepted	CIRE1	-	1
Adams, Suzanne C	Not OBRA - Not PPS - PPS Discharge	12/29/2020	01/05/2021	/ /	/ /	-	Accepted	-	-	1
Adams, Suzanne C	Quarterly 90 - 5 day	01/22/2021	01/29/2021	/ /	/ /	-	Accepted	KIGE1	PD110	1
Doe, Jane	Quarterly 180 - Not PPS	11/30/2020	10/26/2020	/ /	/ /	-	Accepted	JEMA	SE360	1
Edwards, Mary J	Not OBRA - Not PPS (PPS Discharge)	12/02/2020	12/09/2020	/ /	/ /	-	Accepted	-	-	0
Edwards, Mary J	Not OBRA - Not PPS (5 day)	12/29/2020	01/07/2021	/ /	/ /	-	Accepted	LAQD	-	0
Edwards, Mary J	Quarterly 180 - Not PPS	01/11/2021	01/15/2021	/ /	/ /	-	Accepted	PAQD	SSC60	1
Einstein, Albert	Not OBRA - 5 day	11/29/2020	12/04/2020	/ /	/ /	-	Accepted	OHCC1	-	1

Features:

- The Transmit Manager panel displays all the MDS records that are completed but have not yet been marked as accepted by CMS. The Menu options listed right above this panel allow you to manage and work on the assessments as needed.
- You can click on a column heading to sort the listed records by that column.
- When records are deleted or marked as accepted by using the drop-down options in the Status column or the Accept All button, use the "Refresh" button at the top of the Manager to remove them from the Transmit Manager Panel.
- The **Transmit Date** column displays the last possible transmission date for the assessment. This value will appear in gray unless it is coming up in the next three days, or it is overdue; in which case the date appears in red. Once an assessment has been marked as "Accepted," the Transmit Date column clears out and displays a dash (-).
- The **Status** column is used to track the progress of batched assessments. You may mark assessments as **Accepted**, **Rejected**, or **Resubmitted** using the drop-down list. When an assessment has been marked as Accepted, it will no longer be displayed once the screen is reloaded or refreshed, unless you use Filter to display accepted records.
- Double click a resident's name to display the MDS history for that person.
- The total number of records on the Transmit Manager list corresponds to the total of the yellow and green bars of the Progress Panel displayed above the Held Assessments panel. The yellow completed assessments are the total number of records that have a transmission count of zero (0). The green Transmitted records are the total number of records with a transmission count greater than zero, but that have not been marked as Accepted. The combined total of completed and transmitted records is equal to the total number of records listed in the Transmit Manager panel.
- You can use the **Accept All** button any time you wish to mark all the listed assessments as accepted. The user will be prompted through a couple of questions to click OK, Yes, No, or Cancel on.

- The **Filter** button's primary purpose is a trouble-shooting feature. It allows you to display records for a certain date range, lets you display Accepted assessments which are not listed by default, and lets you filter for any combination of completed, held, rejected, and resubmitted assessments.



  - Example: You would like to see the past 12 months of MDS records for a specific resident:
    - Use the Names button at the top of the Manager to select just the resident you are investigating. The Manager will refresh to display only that resident.
    - Click **Filter**. Use the check boxes to select what type of assessments you wish to see. In this case, make sure there are check marks in all four check boxes.
    - Click **Start Date** to select a start date for the assessments you wish to view. Selecting a date 12 months ago will display any assessments with target dates that fall in the period between the target date and the current date.
    - Click **OK** to display the matching records.
    - When you are done reviewing the records, make sure you select **Filter** again to remove the "Show Accepted" filter.
    - You may select '**Restore Names**' at the top of the Manager to return to the usual display.

Change a Submitted Assessment (before it is accepted by the state)

(This process is used if either is true:

- The assessment has been submitted but **not yet transmitted** to the State
- The assessment has been transmitted to the State and was **rejected**)

1. From within the MDS Manager, highlight a resident's MDS and click onto the **Change** button.
2. The assessment will reopen. Make the appropriate change(s) to the assessment and click **Sign Section** to save.
3. When all necessary changes to this assessment are complete, the assessment must be resubmitted. (See Submitting an MDS in ECS)

Change an Assessment Type (before it is accepted by the state)

The Assessment type may be changed in the **Start**, **Continue** or **Change** functions. If the assessment is not yet completed, it may be more convenient to do so using the **Continue** feature.

1. From within the MDS Manager, highlight a resident's MDS and click onto the **Change** button.

2. To change the assessment type: Click the picklist box ... next to question A0310. The Assessment Type screen will appear. Click **Reset** to clear the previous selections, recode the assessment as appropriate and click **OK**.
    - Transmission Status must be set to the third choice to successfully transmit this assessment to the state.
    - On reviewing the Status screen, some sections may be highlighted in yellow. This indicates that the section has additional questions to complete for the new assessment type (for example, the assessment was changed from a quarterly to an annual assessment). Review and re-sign the affected sections.
3. In **Continue** Assessment, proceed with MDS completion as usual. In **Change** Assessment, when all necessary changes are made and the assessment is complete, the assessment must be submitted. (See Submitting an MDS in ECS)

Change a Signature (before it is accepted by the state)

1. From within the MDS Manager, highlight a resident's MDS and click onto the **Change** button.
2. To remove a signature: Click **Signatures**. A list of the assessment's signatures, sections and dates will appear. Highlight the signature(s) you wish to remove, click **Delete** and click **OK**.
3. To change a signature date: Click **Signatures**. A list of the assessment's signatures, sections and dates will appear. Highlight the signature you wish to change and click **Edit**. A calendar will appear. Set the calendar to the desired date and click **OK**. Repeat as needed. Click **OK** to close the Signatures screen and return to the assessment.
    - Note that changed and removed signatures will only be reflected in the signatures found in item Z0400 of the assessment. The Status screen will always reflect true initials and dates. The Status screen is **not** transmitted with the assessment to the state and is only accessible within ECS.
4. Select **Close** to exit the assessment.

Complete a Correction of an Assessment

(A Correction may need to be completed **if the state accepted an assessment** and the assessment needs to be modified or inactivated)

1. From within the MDS Manager, highlight a resident's MDS and click onto the **Correct** button.
2. A copy of this assessment will appear. Select the appropriate answer for A0050 (Modification or Inactivation) and sign Section A. Complete Section X and click **Sign Section** to save.
3. If you choose to modify (rather than inactivate) the assessment, select the section(s) where the correction is needed, make the appropriate change(s), and click **Sign Section** to save.

4. When all necessary changes to this assessment are complete, the Correction assessment must be submitted, and then transmitted to the state. (See Submitting an MDS in ECS)

Note: each correction assessment will have an "M" or "I" in parentheses to indicate whether the correction is an inactivation or modification.

Delete an Assessment

1. From within the MDS Manager, highlight a resident's MDS and click onto the **Delete** button.
2. A warning will appear asking Delete assessment (assessment name and date)? Click **Yes** to delete.

View or Print an MDS

1. From within the MDS Manager, highlight a resident's MDS and click onto the **View** button.
2. To print the assessment, click the **Print** button at the bottom of the Assessment. Verify sections to print and click **OK**.
3. The user may choose the pages/sections they wish to print by checking the appropriate boxes, then select **OK**.
4. Click **Close** to return to the Access menu.

Complete an MDS Electronic Transfer in ECS (Transmit an MDS)

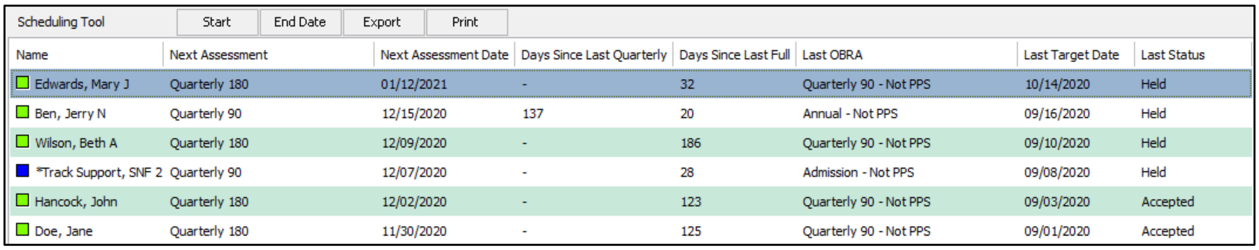
1. From the MDS Manager, click **Transmit**.
2. There are several options for generating a list of MDS assessments to transmit:
    a. Select specific residents by clicking on the **Residents** button.
    b. Select a Start and End date, for example Start 7 days prior to the electronic transfer.
    c. Put a checkmark in All Assessments (all assessment including those previously batched for transmission), or
    d. Put a checkmark in New Assessments (only those assessments that have not yet been batched for transmission. ****All Assessments or New Assessments is always selected****
3. After picking the desired combination of options, click **List**. ECS will pull up any federal assessments that meet the requirements selected in step 2. To see ALL assessment, click on Show All at the bottom of the MDS Selection Screen.
4. Pressing CTRL on the keyboard, highlight any assessments you wish to include in the transmission batch file.
    - Assessments must display as *Completed* under the Status column. Held assessments will not be batched for transmission.
5. Click **OK**.
6. Enter the file name in the Path field, followed by *.zip*. You may also use Browse to select the desired path.

7. Click **Create File**.
8. A Transmission Summary report will appear. Click **Print** and keep a copy with the corresponding validation report for your records.

The file is now ready for transmission to the state via the usual method.

Scheduling Tool

The Scheduling Tool panel assists users in determining when a resident's next OBRA MDS is due.


Scheduling Tool | Start | End Date | Export | Print

Name	Next Assessment	Next Assessment Date	Days Since Last Quarterly	Days Since Last Full	Last OBRA	Last Target Date	Last Status
Edwards, Mary J	Quarterly 180	01/12/2021	-	32	Quarterly 90 - Not PPS	10/14/2020	Held
Ben, Jerry N	Quarterly 90	12/15/2020	137	20	Annual - Not PPS	09/16/2020	Held
Wilson, Beth A	Quarterly 180	12/09/2020	-	186	Quarterly 90 - Not PPS	09/10/2020	Held
*Track Support, SNF 2	Quarterly 90	12/07/2020	-	28	Admission - Not PPS	09/08/2020	Held
Hancock, John	Quarterly 180	12/02/2020	-	123	Quarterly 90 - Not PPS	09/03/2020	Accepted
Doe, Jane	Quarterly 180	11/30/2020	-	125	Quarterly 90 - Not PPS	09/01/2020	Accepted

Features:

- The Scheduling Tool panel displays the next OBRA MDS that is due as well as the next assessment's predicted target date. Any dates displaying in red indicate that the target date is coming due in the next few days or is already past due.
- You can click on a column heading to sort the listed records by that column.
- The other columns available in the Scheduling Tool will list the days since the resident's last quarterly MDS, last full MDS, as well as the last OBRA that they have marked as either Accepted, Submitted, or still in progress (Held).
- Double click a resident's name to display the MDS history for that person.
- To start an MDS, click onto the name, and select **Start**. This will open the **Type of Assessment/Tracking** screen with the OBRA type already pre-selected. Verify the information and click **OK** to begin the MDS.
- If only wanting to see MDS' due prior to a specific date, click onto **End Date**, select the date, and click OK. Click onto **End Date** again to clear out the date.

Print the CAAs

1. From the MDS/Resident Care Coordinator Access menu, highlight a resident's name and click **Print CAAs**.
2. A list of the resident's assessments will appear. Highlight the appropriate assessment and click **OK**.
3. The report preview will appear. Click the print icon in the top left corner of the preview to send the report to your printer.

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

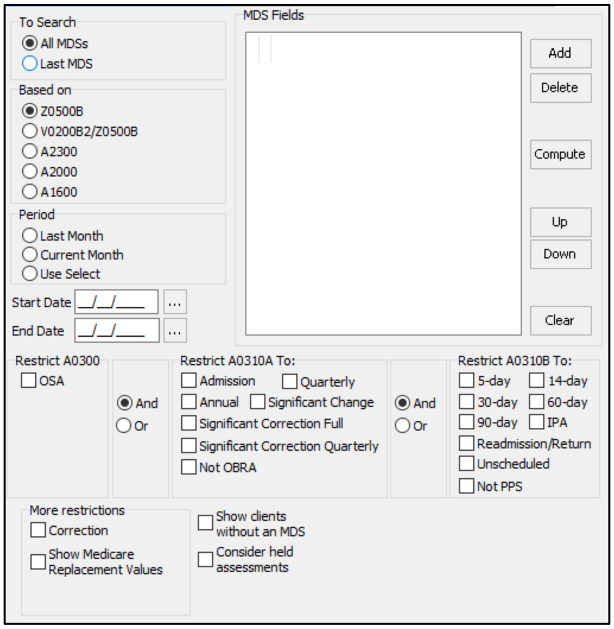
Information can be pulled to the 802 Survey Report from the most recently submitted ECS as well as from charting within ECS.

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.

MDS Reports



1. From the MDS/Resident Care Coordinator Access screen, click **MDS Reports**.
2. Click the **Add** button to display a list of all MDS items.
3. Holding Ctrl on the keyboard, highlight any fields you wish to look at, then click **OK**.
   - The items will appear in the MDS Fields box.
4. Choose any other criteria desired for the report (e.g., MDS Assessment types, date ranges, basis of dates selected).
5. Save this setup for future use by selecting the **Task** button. In Tasks, click **Save As** and enter a name for the task. Select the Sites and User groups who will have access to this report. The report will be displayed on the Task List.
6. To Load a task, click **Task**, highlight the task, and click **Load** to pull the saved information into the MDS Fields box. (This can be done instead of steps 1-5 if a task was saved previously as described above)
7. Click the **Name** button on the far right, highlight the resident name(s) for this report, and click **OK**.

8. Click the **Print** button to see the report. Click **Print** to print the results, or **OK** to go back to the MDS 3.0 Report screen. Select any desired print options at the bottom of the screen that before the report is printed.
9. Click **Export** to send the report to Excel. You will first be able to select whether all items export or only the selected items. Then you can save the report with the appropriate file type.

MDS Analytics

1. From the MDS/Resident Care Coordinator Access screen, click **MDS Analytics**.
2. In the Select Reports area, use the drop-down menu to select the desired report type.
3. In the Site/Service area, select the Site/Service combination that the user wishes to run the report for.
    - Only one Site/Service combination can be selected at a time.
    - Only Site/Service combinations with MDS tables will be displayed.
4. In the **Period** area, select the date range desired for data collection. Both a start date and end date are required.
5. Select the **Print** button over to the far right to display the report on the screen. Once the report displays, this can be printed.
6. Rather than printing, the report can be exported by selecting the **Export** button and saving the report to the desired location. Below is an example of an MDS Analytics report:

Length of Stay Report

Site 1 \ SNF Care — Date Printed: 5/14/2020

01/01/2019-12/31/2019 — User: Ceaser, Heather D

Admissions

Name	Admission Date	Reentry Date
Edwards, Jack C		12/20/2019
Hershey, Darlene	12/10/2019	
Adams, John	05/14/2019	
Jefferson, Thomas		07/17/2019
TOTAL: 4	TOTAL: 2	TOTAL: 2

Discharges

Name	Date
Adams, Suzanne C	11/14/2019
Adams, John	06/03/2019
Jefferson, Thomas	05/27/2019
Jefferson, Thomas	08/01/2019
TOTAL: 4	

Short Term Residents

Name	Length of Stay	
Adams, Suzanne C	43	
Adams, John	20	
Jefferson, Thomas	30	
Jefferson, Thomas	15	
TOTAL: 4	Days: 108	Average Short Term Length of Stay: 27.00