

# MDS (for departments)

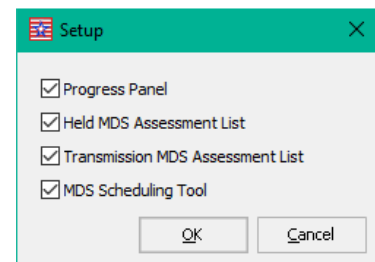
## Load the MDS Manager

1. From your **Access** screen, click **MDS Manager**.
2. Select the Site and Service you would like to manage MDS' for. Click **OK**.
3. If this is your first time loading the MDS Manager, you may need to adjust the setup so that you do not see panels which you do not need. Click onto **Setup** and uncheck **Progress Panel** and **Transmission MDS Assessment List** and click **OK**. This preferences are now saved and this step will not need to be completed in the future.



## MDS Manager Screen Description

- **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.
- **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.

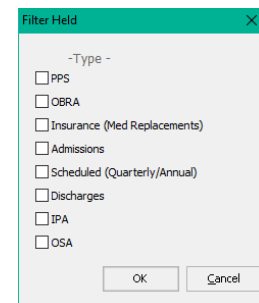
## Held Assessments Panel

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 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 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 if needed. 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).




## 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.

### Miscellaneous Information

- Questions written in red are PPS items which directly affect the RUG score.
- Questions with a green dot affect 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 on 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 specific section, or when an answer is chosen that conflicts with supporting documentation in the chart. Click **Notes** 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. Placing a checkmark in this box will grey out the entire question and will write a - 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. A grey (not black) checkmark will appear in the checkbox and will write a - in the transmission file for this item.
- To review all unknown items in the assessment, click **Unknown**.
- To remove an answer from an item that is answered with radio buttons (dots), click the word next to the dot.

## View or Print an MDS

1. From within the MDS Manager, highlight a resident's MDS and click 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 your **Access** screen.

## Complete the CAAs

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

- From within the MDS Manager, highlight a resident's MDS and click the **Continue** button.
- Select Section V from the Status screen 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 CAA Information column.

- To complete a CAA, click in the corresponding picklist box to the left of the CAA number.
- 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.

V0200 **CAAs and Care Planning**

- Check column A if Care Area is triggered.
- For each triggered Care Area, indicate whether a new care plan, care plan revision, or continuation of current care plan is necessary to address the problem(s) identified in your assessment of the care area. The Care Planning Decision column must be completed within 7 days of completing the RAI (MDS and CAA(s)). Check column B if the triggered care area is addressed in the care plan.
- Indicate in the Location and Date of CAA documentation column where information related to the CAA can be found. CAA documentation should include information on the complicating factors, risks, and any referrals for this resident for this care area.

**A. CAA Results**

| Care Area                   | A. Care Area Triggered              | B. Care Planning Decision           | Location and Date of CAA documentation |
|-----------------------------|-------------------------------------|-------------------------------------|--|
| 01. Delirium                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  |
| 02. Cognitive Loss/Dementia | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | CAA: 11/20/2017                        |
| 03. Visual Function         | <input type="checkbox"/>            | <input type="checkbox"/>            |  |
| 04. Communication           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  |

Review Contributing Factors

**CAA-4 COMMUNICATION**


**Care Plan Decision**

| DISEASES AND CONDITIONS:     |                           |                        |           | MEDICATIONS:            | COMMUNICATIONS: |
|------------------------------|---------------------------|------------------------|-----------|-------------------------|-----------------|
| Alzheimer dx/other dementias | Causes of voice deficits: | Transitory conditions: | Other Dx: | narcotic analgesics     | Expressive      |
| aphasia following CVA        | asthma                    | delirium               |           | antipsychotics          | speaks dif      |
| Parkinson's disease          | emphysema/COPD            | infection              |           | antianxiety             | disruption i    |
| mental health problems       | cancer                    | acute illness          |           | antidepressant          | prob w/voice    |
|                              | poor fitting dentures     |                        |           | Parkinson's medications | word fini       |
|                              |                           |                        |           | hypnotics               | difficult sei   |
|                              |                           |                        |           | gentamycin              | problem des     |
|                              |                           |                        |           | tobramycin              | pronouncing     |
|                              |                           |                        |           | aspirin                 | st              |
|                              |                           |                        |           | Other:                  | hoarse or       |

Edwards, Jack C 03/26/1923 94 Yrs M Site 1 North 206-1

CAA 04 - Communication

Condition(s): 1. Hearing item has a value of 1 through 3 indicating hearing problems on the current assessment as indicated by: B0200 >= 1 AND B0200 <= 3, 2. Impaired ability to make self understood through verbal and non-verbal expression of ideas/wants as indicated by: B0700 >= 1 AND B0700 <= 3, 3. Impaired ability to understand others through verbal content as indicated by: B0800 >= 1 AND B0800 <= 3

- 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.


- 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. The Care Plan Decision words are **required** to complete the CAA Summary Form; the user **must** choose one of the following words: Will not develop care plan, Will develop Care Plan, Care Plan Decision is Unknown.
- CARE PLAN:**

Will not develop care plan:

Will develop Care Plan

Care Plan Decision is Unknown
- 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 onto the **Summary** icon at the top of the screen. Click **Exit** when completed viewing the summary of your CAA.
  - 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 window, to select from the Care Plans listed:
  - 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.
  - 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.
  - Click **Close** to return to your **Access** screen.

## 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 be included 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 "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**.

## Print the CAAs

1. From your **Access** screen, click **Print CAAs**, select the resident's name, and click **OK**.

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 printer icon in the top left corner of the preview to send the report to your printer.

## View the MDS Schedule

1. From your **Access** screen, click **MDS Manager**.

| Scheduling Tool   |                 |                      |                           |                      |   |                  |             |
|-------------------|-----------------|----------------------|---------------------------|----------------------|---|------------------|-------------|
|                   | Start           | End Date             | Export                    |                      |   |                  |             |
| 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 90    | 04/08/2020           | -                         | 126                  | Admission - Not PPS (5 day)                     | 01/09/2020       | Accepted    |
| Einstein, Albert  | Quarterly 90    | 04/13/2020           | -                         | 121                  | Admission - Not PPS                             | 01/14/2020       | Accepted    |
| Yankee, David H   | Quarterly 90    | 04/13/2020           | -                         | 121                  | Admission - Not PPS                             | 01/14/2020       | Accepted    |
| Jefferson, Thomas | Quarterly 90    | 04/20/2020           | -                         | 114                  | Admission - 5 day                               | 01/21/2020       | Accepted    |
| Zeik, Sharon B    | Quarterly 90    | 04/23/2020           | -                         | 111                  | Admission - Not PPS (5 day)                     | 01/24/2020       | Accepted    |
| Smith, Carmen     | Quarterly 90    | 04/23/2020           | -                         | 111                  | Admission - Not PPS                             | 01/24/2020       | Accepted    |
| Hancock, John     | Quarterly       | 04/30/2020           | 104                       | -                    | Quarterly 270 - Not PPS (5 day) (PPS Discharge) | 01/31/2020       | Held        |
| Adams, Suzanne C  | Quarterly 180   | 05/01/2020           | 103                       | -                    | Quarterly 90 - 5 day                            | 02/01/2020       | Completed   |
| Anthony, Susan B. | Quarterly 90    | 07/01/2020           | -                         | 42                   | Admission - Not PPS (5 day)                     | 04/02/2020       | Completed   |

### 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.