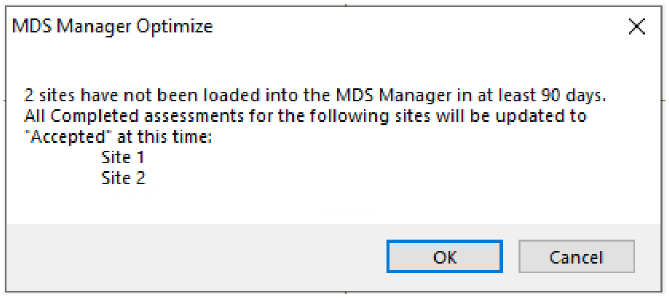
Getting Started with the MDS Manager

Getting Started

The first time you open the Manager, you will need to clear out any old, incomplete assessments, as well as the backlog of MDS assessments that have previously been transmitted and accepted by CMS. This will essentially create a "clean slate" for you to begin using the MDS Manager to track which assessments need to be transmitted to CMS and subsequently mark that they have been accepted.

Opening the MDS Manager for the First Time

1. Click American Data – ECS > Write > MDS 3.0 Assessment > MDS Manager or use an Easy Access button titled "MDS Manager" setup for this purpose.
2. The Client Filter screen will be displayed. It is designed to select the appropriate MDS records for you without manually selecting client names.
   - This will default to your currently selected site(s) and service(s).
   - There will be check marks in the statuses of Active, Inactive, and Hold.
   - Making changes to the Status selections could cause you to miss assessments that are in progress or need to be transmitted.
3. Click OK to accept the default filters.
4. ECS will check when, if ever, the manager was opened before the selected site(s). If it has been longer than 90 days, a message will appear:



5. When you click OK, all completed assessments for the selected site(s) will be marked as Accepted. This may take a few moments.
6. The MDS Manager will load.

MDS Manager Screen Description

The Manager is made up of several menu options across the top, as well as four informational panels.

- Progress Panel – Displays the total number of assessments that are currently being worked on. The progress bar consists of three color coded categories:
  - 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 yet 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" within the Manager.
- Held Assessments Panel – Lists all the assessments that are currently in progress. Menu options allow you to manage and work on these assessments as needed.
  - When the Manager is first opened, you may find old, unwanted records on the Held Assessments list, in addition to the ones you are currently working on. Any unwanted assessments should be dealt with prior to using the Manager on a regular basis.
- Transmit Manager Panel – By default, this lists all assessments that have been completed, but have not yet been marked as "Accepted."
  - When the Manager is first opened, this panel will be blank. It will begin to populate as records are completed.
- Scheduling Tool Panel – By default, this lists all residents who have upcoming due OBRA assessments.
  - When the Manager is first opened, you may notice several residents populating into here that should not. This would mean that they did not have a Discharge Assessment completed to "stop" their stay. Currently, the only way to stop them from displaying would be to complete a Discharge MDS record.

Removing Unwanted Records from the Held Assessments Panel

Check for old, unwanted assessments that for some reason have never been completed, deleted, or marked as incomplete. These should be removed before implementing the MDS Manager.

1. The records are listed alphabetically by client. Start by sorting the list into "Target Date" order. To do this, click on the **Target Date** column heading. Assessments without a date will be listed first, followed by the oldest assessments and ending with the most recent.
2. Review the list for any assessments that should be removed. This may include records for fake/practice clients, or any other records that for some reason were never completed. Determine what should happen to each unwanted record. Note that double clicking on a resident's name displays his/her entire MDS history.
   a. Records for fake/practice clients can be deleted, or you can choose to move the fake client into the "Other" Locate status they do not appear on the MDS Manager at all. Only American Data staff can move fake/practice clients into Other. Please contact the Clinical Department so we may complete this task for you.

Adding the MDS Manager to Easy Access

The MDS Manager should be added as an Easy Access button to the MDS Coordinator's Easy Access screen.

1. On the Toolbar, click onto the **Setup** icon.
2. Find the location of the MDS Coordinator's Access screen. This will most likely be in a section called Clinical Access, or it may be in the MDS 3.0 section.
3. Double click into the topic to display the words inside.
4. Copy and past an existing access button and open the Word Properties.
    a. In the Options tab, rename the Short Name to be "MDS Manager."
    b. In the Options tab, remove any Actions listed in the Actions area.
    c. In the Word Control tab, remove any topic listed in the GoTo Topics/Word area.
    d. In the Options tab, select the Add button to the right of the Actions box, click onto "Pick Menu." Open **Write** > **MDS 3.0 Assessment**, select **MDS Manager**, and click **OK**. Change the "When to Run" option to "On Click" and click **OK**.
    e. Click **OK** to save setups for the MDS Manager access button.
5. Move buttons around to position the MDS Manager button into the desired location.
6. You may choose to delete some access buttons now, or later; that complete functions that may now be done via the MDS Manager. Buttons which could be deleted include Start, Continue, Change, Delete, View, Transmit, Incomplete, and Restore.