Updated CMS Survey Documents

The following link is for the survey materials utilized in Long-Term Care Facilities: https://www.cms.gov/Medicare/Provider-Enrollment-and-Certification/GuidanceforLawsAndRegulations/Nursing-Homes. This webpage includes links to the updated 802, updated LTC Survey Pathways, and updated Survey Resources. Each of these items were updated as of 11/25/2020.

Prior to following steps below to update documents within your system, make sure that you have saved all three picture files associated with this webinar.

Updated 802 Matrix

The update to the 802 is only in field 20. The following items have been added: sepsis (SEP), scabies (SCA), gastroenteritis (GI) such as norovirus, SARS-CoV-2 suspected or confirmed (COVID), and other (O) with a description. The footer has been updated to 11/2020.

The new items are not found on the MDS, so will appear in the Errors list and will need to be coded manually. The other option would be to adjust this field to "Use Charting." This is an option, but then all Infection types will need to populate from charting, rather than the MDS.

Entrance Conference Worksheet

The Entrance Conference Worksheet documents have been updated to include additional COVID-19 language. To swap out the reports in your system with the updated ones, follow the steps below:

1. Navigate to **American Data – ECS > Setup > Report > Report Maker**.
2. Click onto the **Open** icon.
3. Find the report titled "Surveyor – Entrance Conf Worksheet (1)" and click **OK.**
4. Double click into the field which displays the current worksheet. The **Field Properties** box will appear.
5. Click onto the picture to the right-hand side of **Find Picture**. This will open an "Open File" screen which allows you to navigate to where you saved page 1 of the Entrance Conference worksheet. Select the image, click **Open**. Click **Close** to update the field with the new picture.
6. Click **Save**.
7. Click onto the **Open** icon.
8. Find the report titled "Surveyor – Entrance Conf Worksheet (2)" and click **OK.**
9. Double click into the field which displays the current worksheet. The **Field Properties** box will appear.
10. Click onto the picture to the right-hand side of **Find Picture**. This will open an "Open File" screen which allows you to navigate to where you saved page 2 of the Entrance

Conference worksheet. Select the image, click **Open**. Click **Close** to update the field with the new picture.

11. Click **Save**.

EHR Information Sheet

The EHR Information sheet is to be given to the survey team so that they are educated on where to find the requested data within the EHR. One additional bullet point has been added for COVID-19 Test Results. There are several setups that may need to complete within your system to accommodate this change.

Step 1 – Update the documenting screen (Lab/X-Ray Results)

1. Click onto the **Setup** icon on your Toolbar tab.
2. Navigate to the Nurse Charting/Nursing/ AL Charting section.
3. Find a **Lab/X-Ray Results** topic.
4. Within here, determine the best location for adding a COVID-19 word, as well as potential new result words (positive, negative).
5. Find a word like the one you need (e.g., DIGOXIN LEVEL), right click onto the word, select **Copy/Auto-Set**. Click **Paste** into a blank cell. When promoted, click onto **Auto Set**. If you receive a warning that there is nothing to auto-set, then click **OK.**

Lab Result		
LAB RESULTS:	**RESULT TYPE:**	slip (create attachment)
COVID-19	**VALUE:**	(Normal)
DIGOXIN LEVEL	**UNITS:**	(High)
INR (results from lab)	**REFERENCE VALUE(S):**	(Low)
INR (results in-house)	***ABNORMAL***	(Negative)
LITHIUM		(Positive)
PHENOBARBITAL	**SCANNED LAB RESULTS:**	
PHENYTOIN (DILANTIN)	Browse for document	
PT (PROTIME)		
TEGRETOL		
TSH		
WBC		
Sodium		
Potassium		
Chloride		
OTHER:		

Step 2 – Create the View Task

1. Click onto the green **View** icon on your Toolbar tab.
2. When prompted to select names, ensure none are selected and click **OK**.
3. Click onto **Topic**. Navigate to the section(s)/topic(s) in which the COVID-19 result word was added into. Select the COVID-19 word, click **OK**.
4. Click onto **Control** and remove the checkmarks in "Use Start Date" and "Isolate." Click **OK.**
5. Click onto **Tasks** and **Save**. Enter in the name of the task and click **OK**.
6. Select the Site/Service(s) who should have rights and click **OK.** Select user groups who should have rights (make sure to include the surveyor user group as they will need access to this) and click **OK.**
7. Click **Close** and **Exit.**

Step 3 – Update the EHR Report

1. Click onto the **Open** icon.
2. Find the report titled "Surveyor – EHR Information and click **OK.**

3. Double click into the field which displays the current worksheet. The **Field Properties** box will appear.
4. Click onto the picture to the right-hand side of **Find Picture**. This will open an "Open File" screen which allows you to navigate to where you saved the Entrance Conference Worksheet – EHR. Select the image, click **Open**. Click **Close** to update the field with the new picture.
5. Right click onto the text field to the right of Hospice and select **Copy**.
6. Right click below that field and select **Paste.**
7. Double click into the new text field and change the word "Hospice" to instead be "COVID-19 Test Results." Click **Close** to save the text. Move the field into position so it is lined up with COVID-19 Test Results on the picture of the report.
8. Click **Save**.

Surveyor Access Screen

In 2017, we sent out brand new access screens for surveyors. These access screens are simply short cuts and did not come linked up. In addition, they are not linked to the surveyor user group in your system. At that time, we had recommended that facilities review each button and determine that it is linked appropriately. Although switching to this access screen was not a requirement, it was created for ease of use for the survey team. In addition, it matches with their EHR Information Sheet. Each of their requests listed matches with a button on the access screen.

If your facility had not implemented this access screen, but you are interested in now doing so, please follow the instructions in the supplemental handout - *Surveyor Implementation Guide (2017)*. If your facility has already implemented this screen, you will just need to follow the below steps to update your screen for the new requirement.

1. Click onto the **Setup** icon on your Toolbar tab.
2. Navigate to the Clinical Access tab.
3. Find the Surveyor (2017) topic (or it may be that it has been renamed to something different). Double click into this topic.
4. Right click onto an existing button and select **Copy** and paste into a blank space.
5. Right click onto the newly pasted button and select **Properties**. Change the **Short Name** to "COVID-19 Results."
6. In the **Actions** area, click onto the existing action and select **Remove**. Then click onto **Add** > **Pick Task(s)** > Place the dot in **View** > Highlight the view task you created earlier > Click **OK** > Place a checkmark in **Name Selection** and **Control** > Click **OK** > Click **OK**.