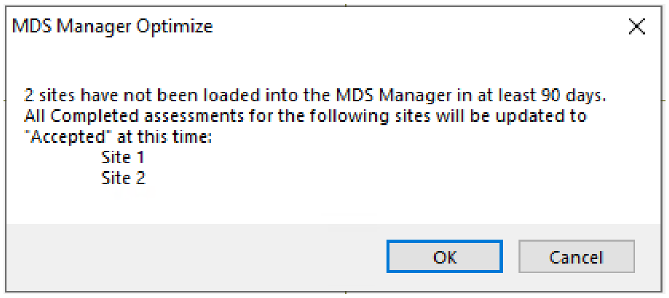
Getting Started with the MDS Manager

Getting Started

The MDS Manager is only available in ECS10. 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 all status types except "Other."
    - 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.

About & Using the MDS Manager

MDS Manager Access

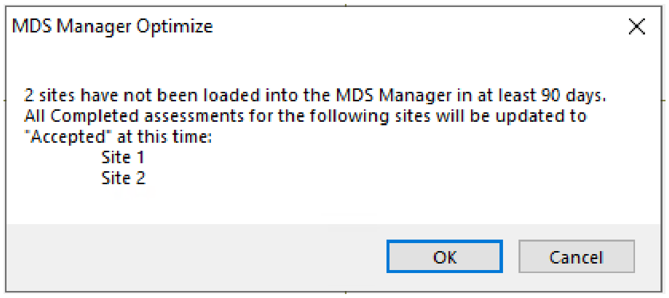
Rights

The MDS Manager right is found in the rights tree at **Write > MDS 3.0 Assessment > MDS Manager**. When a facility is converted from v9 to v10, User Group rights are automatically update for the MDS Manager as follows: any user group with full or partial rights to either Write > MDS 3.0 Assessment or View > MDS 3.0 Assessment will be updated with rights to the MDS Manager. This setting can then manually be changed as needed.

Within the MDS Manager, there are various buttons to complete MDS functions as well as Chat and Messaging functionality. These buttons will only work for users if they have rights to the individual features as setup in the user group rights tree. For example, the "Change" button will only function for a user who has rights to Write > MDS 3.0 Assessment > Change. In this way, a variety of users can be given access to the MDS Manager without raising concerns regarding their level of access.

Opening the MDS Manager

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 all status types except "Other."
    - 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:



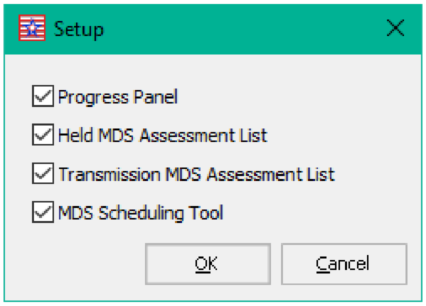
5. When you click **OK**, all completed assessments for the selected site(s) will be marked as Accepted. This may take a few moments.
6. The MDS Manager will load.

Use the Help Popup feature (the question mark in the top right corner [?]) for information about individual features. Click onto the question mark, and then click onto the button or feature you want to learn more about.

MDS Manager Features

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.
- 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.

Menu Options

- **Start** – Click **Start** to start a new MDS assessment for any client.
- **Continue** – Select an assessment from the list and click **Continue** to open the assessment and continue work on it.
- **Delete** – Select an assessment from the list and click **Delete** to remove the record.
- **View** – Select an assessment from the list and click **View** to view the MDS.
- **Incomplete** – Select an assessment from the list and click **Incomplete** to mark the record as incomplete. You will be asked to enter a reason as to why it is being marked as incomplete.
- **Restore MDS** – Click **Restore MDS**, select a client. Choose a deleted or incomplete record from the list and restore to an active status.

- **Filter** – Click onto **Filter** to narrow down the assessments which are displayed in the Held Assessments Panel. Options to select from include PPS, OBRA, Insurance (Med Replacement), Admissions, Scheduled (Quarterly/Annual), Discharges, IPA, and OSA.
- **Export** – Click onto the **Export** button to export all data within the Held Assessments Panel.
- **Print** – Click onto the **Print** button to print some of the key data within the Held Assessments Panel.

Transmit Manager Panel

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

Transmit Manager: 9 | Change | Correct | Delete | View | Transmit | Filter | Accept All | Export | Print

Name	MDS	Target Date	Complete Date	V0200B2	V0200C2	Transmit Date	Status	Z0100	Z0150	Z0200	Trans Count
Doo, Scrappy D	Admission - Not PPS	09/26/2016	09/26/2016	09/26/2016	09/26/2016	10/10/2016	Completed	PA160	PA160	PA160	0
Edwards, Jack C	Not OBRA - Not PPS - PPS Discharge	07/08/2020	07/22/2020	/ /	/ /	08/05/2020	Completed	-	-	-	0
Edwards, Mary J	Not OBRA - Not PPS - DC-RA (PPS Discharge)	07/21/2020	07/30/2020	/ /	/ /	08/13/2020	Completed	-	-	-	0
Adams, John	Not OBRA - Not PPS - PPS Discharge	07/22/2020	07/31/2020	/ /	/ /	08/14/2020	Completed	-	-	-	0
Edwards, Jack C	Not OBRA - 5 day	07/27/2020	08/07/2020	/ /	/ /	08/21/2020	Completed	KFFA1	-	SSA10	0
Einstein, Albert	Not OBRA - Not PPS - PPS Discharge	07/22/2020	08/11/2020	/ /	/ /	08/25/2020	Completed	-	-	-	0
Einstein, Albert	Not OBRA - 5 day	08/11/2020	08/14/2020	/ /	/ /	08/28/2020	Completed	OHNC1	-	CB210	0
Adams, John	Not OBRA - 5 day	08/10/2020	08/21/2020	/ /	/ /	09/04/2020	Completed	CIRE1	-	CA110	0
Edwards, Mary J	Admission - Not PPS (5 day)	09/04/2020	09/15/2020	09/16/2020	09/16/2020	09/30/2020	Completed	LDQD1	-	SSC60	0

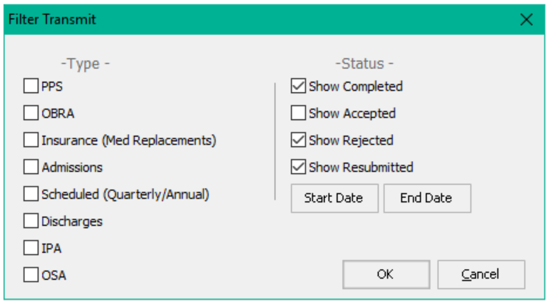
Features

- 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.

Menu Options

- **Change –** Select an assessment from the list and click **Change** to open the assessment via "Change Assessment" mode. This would be utilized to adjust assessments that have been submitted into ECS but rejected by CMS. Or to adjust an MDS prior to batching it into a transmission file.
- **Correct –** Select an assessment from the list and click onto **Correct** to create a correction record for that assessment.
- **Delete** – Select an assessment from the list and click **Delete** to remove the record.
- **View** – Select an assessment from the list and click **View** to view the MDS.
- **Transmit –** Click **Transmit** to open the Electronic Transmission screen and create a batch file. You do not select assessments from the list prior to clicking onto Transmit.
- **Filter** - 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.
- **Accept All** - 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.
- **Export –** Click onto the **Export** button to export all data within the Transmit Manager Panel.
- **Print –** Click onto the **Print** button to print some of the key data within the Transmit Manager Panel.

Scheduling Tool Panel

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.

Menu Options

- **Start** - 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.
- **End Date** - 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.
- **Export** – Click onto the **Export** button to export all data within the Scheduling Tool Panel.
- **Print** – Click onto the **Print** button to print all data within the Scheduling Tool Panel.