

# Survey Report - 802 Matrix

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## User Group Rights to Survey Reports

The 802 may be accessed via a Write or a View option. In the Write option, a user has the capability to adjust the setups of the report, make changes to each of the resident's rows of information, print, and view the report. In the View option, a user can only print or view the report. They are unable to make any setup changes or changes to a resident's information.

To grant or remove access to view the 802, follow the steps below:

1. Click onto American Data - ECS > Setup > Security > User Group.
2. Double click into a user group to access the **Properties** screen.
3. In the **Rights** tree, follow the path **View > Report > Survey** to grant access to view resident information (with a **green** checkmark) or remove access (giving a **red** checkmark).

To grant or remove access to write in the 802, follow the steps below:

1. Click onto American Data - ECS > Setup > Security > User Group.
2. Double click into a user group to access the **Properties** screen.
3. In the **Rights** tree, follow the path **Write > Survey > 802** to grant access to change resident information (with a **green** checkmark) or remove access (giving a **red** checkmark).

To grant or remove access to setup the survey report, follow the steps below:

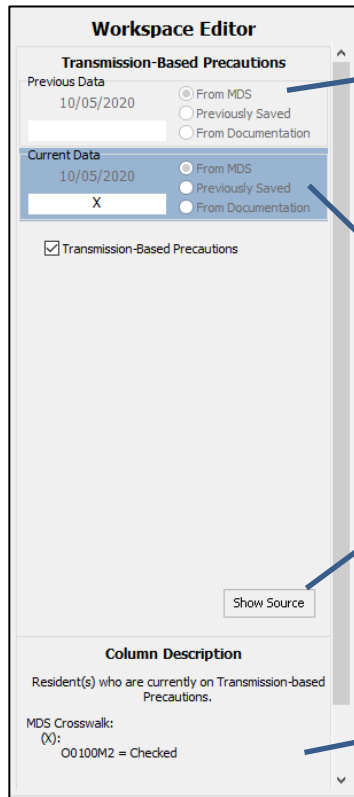
1. Click onto American Data - ECS > Setup > Security > User Group.
2. Double click into a user group to access the **Properties** screen.
3. In the **Rights** tree, follow the path **Setup > MDS 3.0 > 802** to grant access to make changes to the column setups (with a **green** checkmark) or remove access (giving a **red** checkmark).

It is important to be sure any easy access buttons are linked to the appropriate version of the survey report (whether the Write or View version), dependent on the user group needing access. For example, an MDS Coordinator or DON would need the capability to adjust, whereas a floor nurse may only need access to print it and therefore could be given the View option.

## Write/Update the 802 Report

Information can be pulled to the 802 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 **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.
  - It is VERY important to click the Refresh button to bring in updated data. We recommend completing this at least once a week when in survey window or monthly when not.
4. An Audit Results screen will appear to show any errors as well as questions that need to be coded manually. Click **Close**. (To see these audit results again, click on the Errors button at the top of the screen.)
5. The survey 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 most recent MDS in view mode.
  - The "Sort" button can be used to sort the residents by Resident Name, 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 with differing information or the report is edited and saved.



When a report has been refreshed and there is new data that populates, the previous data will be displayed here.

When a report has been refreshed and there is new data that populates, the new data will display here. It will also state where it is coming from (MDS, previously saved, from documentation) and the date.

To view the MDS or documentation, click onto Show Source. This will not work with "Previously Saved" X's.

To see the column description as well as the 802 crosswalk, look in the lower portion of the workspace editor.

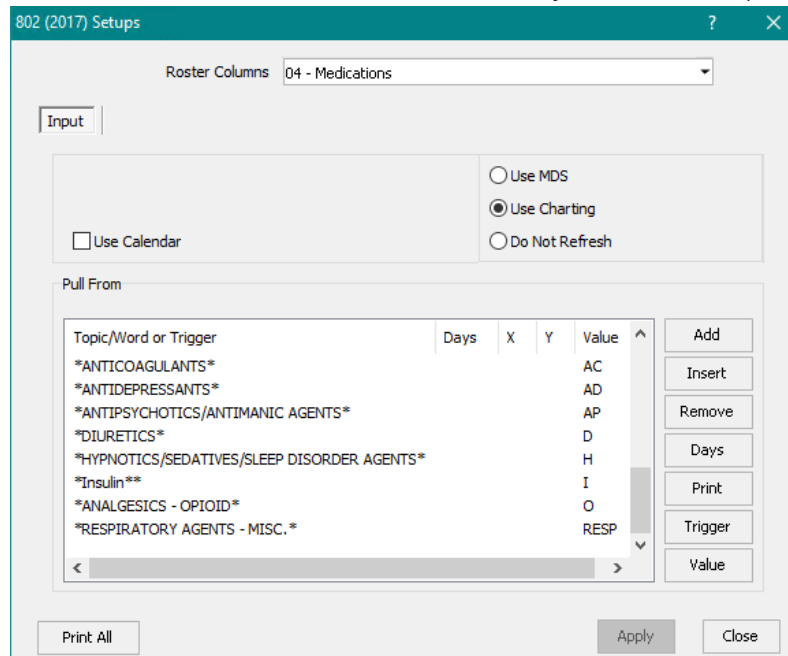
## Adjust Setups of 802

1. From the MDS/Resident Care Coordinator Access screen, click **802 Roster/Sample Matrix**
2. Click onto the Setup button, which loads the column setup options.
3. In the top portion, click onto the Roster Columns dropdown menu to select a column to be adjusted.
4. Each question will have three options to select from:
  - **Use MDS** - will populate the field based on the answers coded on the MDS. This option will be grayed out for columns that must be manually coded as no question that meets the column's parameters exists on the MDS. This option is the most consistent one as it does not need to ever be updated, whereas if the location something is charted changes, then the user needs to remember to also update the survey report setups. This option will gray out all other options on this screen, as this is hard coded.

- **Use Charting** - will populate the field based on whatever word(s) are added into the Topic/Word or Trigger box below. If the radio button has Use Charting selected, there must be items filled in below or this field will not know how/when to populate. Utilize the Add button to select word(s) from within the documenting topics. Set the number of days if needed and place a checkmark in Use Calendar if wanting to look at the calendar for this information (i.e., primary payer source). This option must be kept up manually and adjusted if the location of the documentation changes.
  - **Do Not Refresh** - This will stop the column from pulling in any new information based on the MDS or charting. This may be used in a situation where a facility would rather manually keep something updated than have it populate from MDS assessments or from documentation. A column set to "Do Not Refresh" will only be updated when manually changed by a user.
5. The option selected will determine whether information is added into the "Pull From" location of the screen.
- In the 802, note that several columns populate a different value depending on the requirements for that column. Make sure that when adding in documentation, you also check the column description for any **Value** setups that are needed and apply the appropriate one to each piece of charting being added into the "Pull From" location.
6. As changes are made, click onto **Apply** to save.

In American Data’s default system, all questions are setup to populate from the MDS, except for the ones below. The ones below are setup differently as they are payer sources, which change frequently, or are required to be manually coded as they are not found on the MDS.

- **802 Report “Use Charting” or “Do Not Refresh” Setups:**
  - **00 [Room Number]** > Use Charting > Use Calendar checked > Face Sheet/Rooms/SNF ROOM > 1 day.
  - **01 [Date of Admission if in the past 30 days]** > Use Charting > Use Calendar checked > Face Sheet/NH Status/ADMISSION DATE and READMISSION DATE > 30 days.
  - **04 [Medications]** > Use Charting > Medi-Span drug category for the following with the corresponding value setup: Antianxiety agents (AA), Amebicides (ABX), Aminoglycosides (ABX), Anthelmintics (ABX), Anti-infective agents - misc. (ABX), Antimycobacterial agents (ABX), Cephalosporins (ABX), Fluoroquinolones (ABX), Macrolides (ABX), Penicillins (ABX), Sulfonamides (ABX), Tetracyclines (ABX), Antibiotics - topical (ABX), Ophthalmic anti-infectives (ABX), Otic anti-infectives (ABX), Anticoagulants (AC), Antidepressants (AD), Antipsychotics/Antimanic agents (AP), Diuretics (D), Hypnotics/Sedatives/Sleep disorder agents (H), Insulin (I), Analgesics - Opioid (O), and Respiratory Agents - misc. (RESP). (See photo below).
  - **12 [Dialysis]** > Use MDS. However, In facility and Offsite would be coded manually by the user.
  - **19 [Infections]** > Use MDS. However, Sepsis, Scabies, Gastroenteritis, COVID, and Other must be documented manually unless set to pull from charting.



The screenshot shows the '802 (2017) Setups' window with 'Roster Columns' set to '04 - Medications'. The 'Input' section has 'Use Calendar' checked and 'Use Charting' selected. The 'Pull From' table lists various drug categories and their corresponding values.

Topic/Word or Trigger	Days	X	Y	Value
*ANTICOAGULANTS*				AC
*ANTIDEPRESSANTS*				AD
*ANTIPSYCHOTICS/ANTIMANIC AGENTS*				AP
*DIURETICS*				D
*HYPNOTICS/SEDATIVES/SLEEP DISORDER AGENTS*				H
*Insulin**				I
*ANALGESICS - OPIOID*				O
*RESPIRATORY AGENTS - MISC.*				RESP

## View/Print Survey Report – 802 Matrix

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

8. From the MDS/Resident Care Coordinator Access screen, click **802 Roster/Sample Matrix**.
9. You are then presented with the **Name Selection** screen. Select name(s) that the survey report should be displayed for. Click **OK**.
10. The report will load.
  - The Sort button can be used to sort the residents by Resident Name, or Resident Room.
  - The last column of the report will display when each name was last refreshed, and which user refreshed it for that resident.
11. Click **Print** to print the report.
12. Click **Exit** to return to the Access menu.