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| **Part 1: Resources**  |
| **Subject** | **Checklist** | **Comments/Notes** |
| **Training** **Database Access** | * [**https://login.pointclickcare.com/**](https://login.pointclickcare.com/)

**Username: csctrain.mdsrn96****Password: Hello123** |  |
| **EHR Support** | * Resources available- Guides and Solutions
* FAQS: Submitting Tickets, Calling the Hotline, New User Request and Process, After Hours Support.
* Link to [Frequently Asked Questions](https://cfc.freshdesk.com/support/solutions/folders/156088)
 |  |
| **Part 2: MDS Management and Data Entry** |
| **Subject** | **Checklist** | **Comments/Notes** |
| **MDS Work Flow** | * Review Infographic of MDS work flow from MDS Supplemental PCC guide
* Link to: [MDS Supplemental PCC Guide](https://cfc.freshdesk.com/a/solutions/articles/4000189909)
 |  |
| **Care****Management** **Portals** | * Communications
* Dashboard
* MDS
* Hospital Tracking
* UDA
 |  |
| **MDS-UDA** | * Instructions for when to use/how to use
* Open New
* Edit an In Progress
* Save/Sign/Lock
* Strike Out/Close
* Editing/Adding/Cancelling Schedules
* Link to [MDS: UDA Guide](https://cfc.freshdesk.com/support/solutions/articles/4000007336-mds-uda-guide)
* Link to [Triggered UDA’s document](https://cfc.freshdesk.com/a/solutions/categories/4000000349/folders/4000014425?view=all)
 |  |
| **Care Plan Review** | * Set Care Plan Review Date
* Mark Complete when all departments have signed
 |  |
| **MDS Portal:****Tools for helping determine ARD Date** | * PDPM Dashboard: Allows you to manage MDS assessments for Medicare A or payers following PDPM rules
* Scheduled: Manage MDS Schedules
* Scheduler View
* Display Filter Options
* Resident Name
* Scheduler Links

Red - The MDS is past due.Black - The MDS is due within 30 days.Grey - The MDS is not due within the selected filter options.* Scheduler Options
* ARD Planner Helps you select the best Assessment Reference Date for Medicare and Managed Care payers
 |  |
| **MDS Portal:****In Progress** | **In Progress** Allows you to manage In Progress MDS records and see unsigned MDS sections for each MDS record. |  |
| **MDS 3.0 Data Entry** | * Minimum Data Set (MDS 3.0) Summary Screen
* Creating MDS 3.0 Records: Resident Chart/Portal
* Creating MDS Records for RUG-IV Payers
* MDS Scheduler
* Completing MDS 3.0 Sections
* Managing MDS 3.0 Errors and Warnings
* Acknowledging MDS 3.0 Responses
* Verifying MDS 3.0 Data (Pointright)
* Managing MDS Validations
* MDS 3.0 Sections
 |  |
| **Completing the MDS 3.0 for MDS Coordinators** | * After all, MDS responses are acknowledged and signed. Certify the MDS is complete from the MDS Summary screen.
* After certifying the MDS is complete, you can complete the Care Areas and Care Plan Decisions, if required, and lock the MDS.
* When the MDS is locked, it can be submitted or exported as required via batch creation, or simply maintained in the resident's chart.
 |  |
| **MDS Portal** **3.0 Batches****Creating and Managing MDS Submission Batches**  | **3.0 Batches**Allows you to manage MDS submission batches and access CMS Reports.* Create a MDS Batch: Batches are automatically numbered when the batch is created.
* Monitor Status of Batch Submission
* *Open*
* *Submission in Progress*
* *Results Pending*
* *Accepted*
* *Review Required* (warnings, messages, or rejected records)
* Correct rejected MDS Records

**Export Ready** Shows MDS records that are locked and ready for submission to CMS.**Exported** Shows submitted or exported MDS records**Accepted:** Shows MDS records marked as Accepted.**Completed** Shows MDS records with a status of Completed. For example, MDS records completed for Managed Care that must not be submitted to CMS. |  |
| **MDS Portal****Batch 3.0** **CMS Report 802** | **RESIDENT MATRIX CMS-802*** Refresh Data
* Add New Residents
* Remove Discharged Residents
* Edit/Reset individual residents
* Printable View
* Reset All
* Color Legend
* Edit History
 |  |
| **Clinical Dashboard** | * ADT in the last \_\_days
* Daily Summary
* Incomplete Admission
* Care Plan Reviews & Care Plan Goals Overdue
* Antibiotic Medication Ordered in last \_days
* Psychotropic Medication Ordered in last \_days
* Diagnosis Notification
* Clinical Alerts
* COT Alerts
* MDS Batch Submission Status
* Current CMI
 |  |
| **MDS 3.0 Data Reports** | *MDS Coding and Look Back Reports** Assessment Warnings Report
* Audit Report
* Look Back Documentation Report
* Assessment History
* Resident Response Analyzer Report
* Resident Response Comparison Report
* Resident Response List Report
* MDS Validation Report

*MDS Record Reports** MDS Form
* Assessment Report

*MDS Scheduling Reports** MDS 3.0 Assessment History Report
* Assessment Schedule Cancellations Report
* Target ARD List Report

*MDS Scoring Reports** Outcome Summary Report
* Assessment Scoring Report
* Kardex Report
 |  |
| **Other Reports Commonly Used by MDSC** | * Resident List Report “New”
* Missing Entries
* Immunizations
* Administration Record
* Care Plan Report
* Intervention/Task Scheduling
* Order Listing Report
* Diagnosis Report \*NEW\*
* Case Mix – Detail
* Care plan/Task Item Listing
* 24 Hour Summary/Progress Notes \*New\*/Shift Report
* Midnight Census and Daily Census
* Admission Record (Face sheet)
* Transfer/Discharge Record
 |  |
|  |

**Employee Name & Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Employee Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Trainer Name and Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Trainer Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Appendix A: Disciplines Responsible for MDS Sections and CAA Areas** |

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| **Discipline** | **MDS Section(s)** | **CAA** |
| Dietary | K | 12, 13, 14 |
| Recreation | F, A (A1005 & A1010) | 7, 10 |
| Social Services | B (0700& 0800), C and D, A (PASSR), Q, S (0160, 0171a, 0171b, S6500) | CAA – 2, 7 (if needed), 8, 20 |
| Therapy  | O (auto-populated) MDS Verifies and Signs | None |
| MDS | All Remaining Sections and Questions | 1, 3, 4, 5, 6, 9, 11, 14, 16, 17, 18, 19 |

 |
| **Appendix B:****List of other resource links:** | * [Modifications and inactivation’s - Creating a MDS Correction or Inactivation](https://cfc.freshdesk.com/support/solutions/articles/4000186360-mds-modifying-or-inactivating-mds-3-0-records)
* [IDT MDS Process and UDA v3](https://cfc.freshdesk.com/support/solutions/articles/4000187288-idt-mds-process-and-uda-v3)
* [CAA Area Assignment by Discipline](https://cfc.freshdesk.com/support/solutions/articles/4000187142-care-area-assessment-caa-assignment-by-discipline)
* [Clearing PCC UDA Scheduled](https://cfc.freshdesk.com/support/solutions/articles/4000187286-clearing-scheduled-uda)
* [IDT Team MDS Section Responsibility Outline](https://cfc.freshdesk.com/support/solutions/articles/4000175823-mds-section-responsibility-and-caa-responsibility)
* [Instructions for Scanning documents into PCC](https://cfc.freshdesk.com/support/solutions/articles/4000187284-instructions-for-scanning-documents-into-pcc)
* [Care Plan Closed Automatically if Return Not Anticipated](https://cfc.freshdesk.com/support/solutions/articles/4000187283-care-plan-closed-automatically-if-return-not-anticipated)
* [MDS Auto Submission](https://cfc.freshdesk.com/a/solutions/articles/4000186316)
* [MBI Format](https://cfc.freshdesk.com/support/solutions/articles/4000186319-mbi-fomat)
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| **Appendix C: Pointright** | * [Submitting MDS Data to Pointright](https://cfc.freshdesk.com/a/solutions/articles/4000113632)
* [PointRight General Navigation Guide](https://cfc.freshdesk.com/support/solutions/articles/4000162773-point-right-general-navigation-guide)
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