|  |
| --- |
| **Part 1 Resources and PCC Basics** |
| **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)
 |  |
| **Navigation:** | * Facility Access
* Help
* Secure Conversations
* Resident Search
* Home
 |  |
| **Care****Management** **Portals** | * Communications
* Dashboard
* MDS
* Hospital Tracking
* UDA
 |  |
| **Weights & Vitals Portal** | * Filters
* Exceptions- How to review and address
 |  |
| **eMAR** | * View eMAR/eTAR
 |  |
| **POC** | * View POC
 |  |
| **Hospital Transfer** | * eInteract Change in Condition/ Transfer Workflow
* High Risk Residents for re-hospitalizations
* Hospital Tracking Care Management module
 |  |
| **Resident Clinical Chart** | * Editing Resident Demographics
* Current Vitals
* Resident Header
 |  |
| **Resident Clinical Chart: Resident Dashboard** | * Proceed to Care Plan RAPs & CAAs
* Scores MDS and UDA
* Vital Signs (Most Recent and Graphs)
* Orders: Diet, Medication Listing, Advanced Directives
* Scheduled Events
 |  |
| **Resident Clinical Chart: Profile** | * Contacts
* Medical Professionals Assign PCP
* Medical Professionals add others
* External Facilities
 |  |
| **Resident Chart: Census** | * Viewing History of Census Activity (room changes, transfers, discharges, readmits).
 |  |
| **Resident Chart: Medical Diagnosis** | * View a diagnosis
* Add a diagnosis when ICD-10 code available
* Strike out a diagnosis
* Ranking
* Diagnosis Sheets
 |  |
| **Resident Chart: Allergy** | * Add an allergy (drug, food, environmental, substance)
* Strike out an incorrect entry
* Resolve an allergy
 |  |
| **Resident Chart: Immunizations** | * Immunization Documentation
* Historical/Consented etc.
* CVX Code
* Results
* Strike out/Edit an Incorrect Entry
 |  |
| **Resident Chart: Orders** | * View orders (filters)
* Types of Orders (pharmacy, diet, lab, diagnostic, other)
* Order Template(s)
* Batch Order Set(s)
 |  |
| **Resident Chart: Weights/Vitals** | * View Vitals
* Exceptions/Warnings Clearing
* Graphs for reviewing Baseline Accuracy
 |  |
| **Resident Chart: Results** | * View Laboratory/Radiology Results
 |  |
| **Resident Chart: MDS** | * Review current and historical MDS
 |  |
| **Resident Chart: Assessments** | * Filter
* Next Assessment Due
* Discipline Responsible:
* Explain SPN from UDA’s
 |  |
| **Resident Chart: Prog Note** | * View All
* Filters: date ranges, Custom etc.
 |  |
| **Resident Chart: Care Plan** | * View/ Navigate the Care plan
* Activate a Care Plan
* View/Accept/Decline triggered Items
* Edit/Resolve/Cancel Focus, Goals, Interventions, and Tasks
* Link to: [Care Plans and Tasks Guide](https://cfc.freshdesk.com/support/solutions/articles/4000171354-pcc-care-plans-and-tasks)
 |  |
| **Tasks** | * New Tasks
* Triggered Tasks
* Show/Resolved Cancelled
* Customizing/Scheduling
* Resolve/Cancel a Task
* Documentation History
 |  |
| **Misc** | * [View and Upload documents](https://cfc.freshdesk.com/a/solutions/articles/4000187284)
 |  |
| **ADT** | * Link to: [Quick ADT Guide](https://cfc.freshdesk.com/a/solutions/articles/4000187136) Admissions/Transfer/Discharge/Room Change
* Link to: [Admission/Readmission Checklist](https://cfc.freshdesk.com/a/solutions/articles/4000145164)
* Link to: [Discharge Reconciliation Checklist](https://cfc.freshdesk.com/a/solutions/articles/4000145168)
 |  |
| **UDA Portal** | Scheduled* Filters 0 Days, Unit, Floor
* Color coding, Black, Gray, Red
* Expand Filter

In Progress* Finding your in-progress UDAs to complete/sign/strike out

Completed* View completed UDA's

Managing the Portal* Ensuring Timely Documentation
* Reviewing due/overdue assessments for appropriate assessments, removing assessments that are not needed, and updating schedules as needed
 |  |
| **Order Portal** | Order Search* Filters
 |  |
|  |
| **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)
 |  |
| **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:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

|  |  |  |
| --- | --- | --- |
| **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](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)
 |
| **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)
 |