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| **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 |  |
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| **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:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **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) |