

## "NEW ASSESSMENT RELEASE NOTES"

**Scope:** TIPS – New Assessment

**Version:** n/a

**Date:** 12/11/2012



### What's New?

- The Assessment form itself has changed greatly in layout and functionality.
- The User must answer "all" the questions provided before saving.
- Verbiage and other statement changes are in place.

### Outstanding Issues

Ref. #	Problem / Symptoms / Enhancements	Workarounds / Notes
Bug 317	DOB: The DOB is being pulled from the Move-In form not from STAR which only shows an "Age" dialog box	The DOB will eventually populate the dialog box but requires the move-in first. This is an old bug.
Bug 340	Calendars not the same on assessment page	Functionality is not compromised – This is an effort to correct
n/a	When opening an "old" assessment (No "2012" label), you will not see the Base Level selection	This is not an issue but rather a programming limitation. All 2012 labeled will carry that selection forward.

## Documentation Updates / Training Items / General Information

### ASSESSMENT "NEW" FORM INFORMATION

**Date of Birth:**

**Review Date Range From:** 07/27/2012

**Assessment Tool:** 2012 - Charge by Level

**Review Type:** Initial

**When will the next assessment be due:** 08/26/2012

**Print** [Print](#)

**Code Status:** DNR

**Weight:** 100 Lbs

**Height:** 6 Feet

**Diagnosis Types:**

Primary: Alzheimer's

Second: -- Select Secondary Diagnosis --

Third: -- Select Third Diagnosis --

Fourth: -- Select Fourth Diagnosis --

Fifth: -- Select Fifth Diagnosis --

Sixth: -- Select Sixth Diagnosis --

Seventh: --

**Admitting Diagnosis Notes:**

test

**Allergies:**

**Fig. 1**

If 2012 precedes the Charge by type, it is a "new" assessment form you will be working with.

Weight and DOB information are only pulled after the Move-In form is completed. It has always worked this way.

The Code Status selection works as before, you need to select one before saving or you will be flagged that it is required. Also, Weight and Height are also required before saving

Diagnosis drop-down lists (60 items) are now available. Only the Primary Diagnosis is required to "save" the assessment. No two drop-down selections can have duplicate diagnosis. The User will be flagged and the entry will be corrected automatically by the program.

Please refer to the details available at the bottom of this document.

## ASSESSMENTS “SAVED” BUT NOT “FINALIZED”

Date of Birth:	<input type="text"/>
Review Date Range	From: <input type="text" value="07/11/2012"/> To: Not Finalize
Assessment Tool	2012 - Charge by Levels
Review Type:	Initial
When will the next assessment be due:	08/10/2012
Print	Print

Fig. 2

The Review Type will say “Initial” upon a “New” Assessment. The “next assessment due date” will adjust to 30-days in the future automatically when the assessment is opened. This is a requirement.

This new calendar tool allows the User to select when the “actual” assessment was performed as opposed to the date it was entered into the system. This cannot be a future date but rather a past date only. The “next assessment due date” will change accordingly and is based on review type. Ex. 30, 90, 180 days



Date of Birth:	<input type="text"/>
Review Date Range	From: <input type="text" value="07/13/2012"/> To: <input type="text" value="07/27/2012"/>
Assessment Tool	2012 - Charge by Levels
Review Type:	Initial
When will the next assessment be due:	08/12/2012
Activate	Activate
Activate Billing On	<input type="text" value="07/27/2012"/>
Print	Print

Fig. 2a

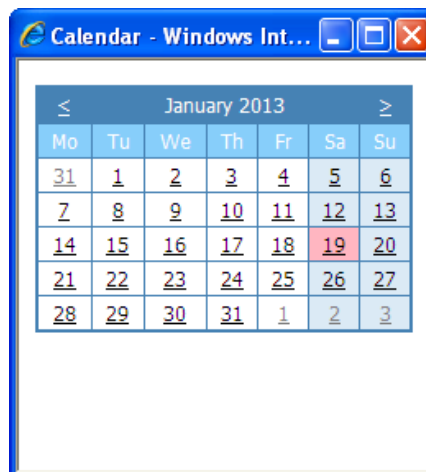
Example: Date Range from when assessment was started and completed. In this example the User selected 7/13 as the start date but was entering / finalizing on 7/27.

## ASSESSMENTS “REVIEW TYPE DROP-DOWN”

Date of Birth:	<input type="text"/>
Review Type:	Change
Assessment Tool	2012 - Charge by Levels
Review Start Date	<input type="text" value="07/23/2012"/>
When will the next assessment be due:	<input type="text" value="01/19/2013"/>
Select Date:	

Fig. 3

Selecting “Change” from this drop-down works as it did before, you are provided a calendar tool that will allow you to manually change the “next assessment due date”.



Date of Birth:	<input type="text"/>
Review Type:	Change <input type="button" value="v"/>
Assessment Tool	Initial <input type="button" value="v"/> Charge by Levels <input type="button" value="v"/>
Review Start Date	Change <input type="button" value="v"/>
When will the next assessment be due:	30 day <input type="button" value="v"/> 90 Day <input type="button" value="v"/> 180 day <input type="button" value="v"/>
Select Date:	<input type="button" value="Calendar"/>

Selecting 30, 60 or 90 days from the list will also automatically change the “next assessment due date” as it has done in the past. The date will be adjusted accordingly.

Fig. 4

There are 12 sections to complete on this assessment. Answer Yes or No to each question. You will be required to add service plan notes in the **add notes** section for every **Yes answer**. You will not be able to finalize the assessment if you do not add notes. For all items marked **NURSE**, the nurse should be consulted prior to accepting the potential resident. For items marked **RDO**, the **RDO** must be consulted prior to accepting the resident.

The above statement directs the User how to proceed with filling out the assessment. To further clarify, the following Rules are broken down in bullet points with more detail.

- If you click YES to “any” of the selections where there is a “notes” field, you **MUST** provide Notes before you Save. If you do not, a message box will notify you of the sections requiring Note information.
- You can put Notes on any NO question but are not required to do so.
- The Base Level will change as needed depending on what you select in each section. For example: If you select YES as a base level it is anticipated you will not be selecting items that have points associated to them. However, if you select something with points, the Base Level will “automatically” change to NO and your Points will start adding be it Charge by Points or Charge by Level. (See Table Pg. 5 below for expected results upon selections)
- You can “Save” an assessment without it being completed but you cannot Finalize it if there are incomplete sections.

## OLD vs. NEW ASSESSMENTS

- When “Old” (pre-July 2012) assessments are opened up, the data will be shown as it was entered at that time with the assessment form used at that time.
- Old assessments used checkboxes (see Fig.5 below) and allowed multiple selections for adding points/levels.
- New assessment use radial buttons (see Fig. 6 below) which only allow for one selection under each section. Due to this change, the assessment appears longer.
- When an existing tenant assessment is due and you select “New” (see Fig. 7 below), any Notes from prior assessments will be ported /extracted and put into the New Assessment form. They can be edited, deleted, etc.
- YES / NO category selections will not carry over from “Old” assessment forms, you will be required to reselect that information but the Notes will.
- YES / NO category selections will not carry over from a “New” assessment form. Ex. Going forward any “New” assessment based from a New Assessment form will also require you to reselect that information but the Notes will carry forward.
- Points will not carry over as a re-selection of assessment items are now required.

- The Assessment List differentiates the “New” assessment form from the “Old” with a 2012 preceding the stamp. All new assessments will carry that label moving forward.

Assessment	Status
2012 - Charge by Levels Finalized Active - (03/22/2012) Level 0 - 0 Points 03/22/2012 - 03/22/2012	New
2012 - Charge by Levels Finalized Level 0 - 0 Points 09/13/2011 - 09/13/2011	
Charged By Levels Finalized Level 0 - 0 Points 02/28/2011 - 02/28/2011	
2012 - Charge by Levels Finalized Level 0 - 0 Points 07/16/2012 - 07/16/2012	

- As before Charge by Level is 1-9 Points :: Level 1, 10-19 :: Level 2, 20-29 :: Level 3, 30-39 :: Level 4, 40-49 :: Level 5 etc.
- You cannot “Finalize” a “New” assessment without answering all the questions YES or NO. Likewise, you are required to add Notes to any YES questions answered whether there are points associated to them or not. If you have not met these requirements you will be flagged with a message upon saving the assessment prompting you to go back and provide that information. Fig. 8. For a quick find, use the CTRL-F key to pull up a web page search function. Fig. 8a & Tables 1a. – 1c. below
- There are now 128 potential questions to answer vs. the 139 potential questions with the “Old” assessment.

**MEDICATION ASSISTANCE** (Enter service plan here.)  
[add notes](#)

☐ No ☒ Yes Do you take any medications, prescription or over-the-counter, including vitamins or nutritional?

Select All That Apply 0 points

☒ Are you able to manage your medications independently, including storage, set-up, taking, re-ordering or do you have someone who manages your medications for you? 0points

☐ Do you need 1-2 reminders per day ONLY in order to safely take your medications? (You are able to order, store, set-up, and take your medications without assistance or supervision. You need reminders only.) Not available in all states. 2points

☐ Do you need 3-4 reminders per day ONLY in order to safely take your medications? (You are able to order, store, set-up, and take your medications without assistance or supervision. You need reminders only.) Not available in all states. 3points

☐ Do you need 5-6 reminders per day ONLY in order to safely take your medications? (You are able to order, store, set-up, and take your medications without assistance or supervision. You need reminders only.) Not available in all states. 4points

☐ Do you need 7 or more reminders per day ONLY in order to safely take your medications? (You are able to order, store, set-up, and take your medications without assistance or supervision. You need reminders only.) Not available in all states. 5points

Fig. 5

**MEDICATION ASSISTANCE** (Enter service plan here.)  
[add notes](#)

☐ No ☒ Yes Do you take any medications, prescription or over-the-counter, including vitamins or nutritional?

\*\*\*Please Select an item below if this Service applies to the Resident! 0 points

sd

☐ Are you able to manage your medications independently, including storage, set-up, taking, re-ordering or do you have someone who manages your medications for you? 0points

☒ Do you need 1-2 reminders per day ONLY in order to safely take your medications? (You are able to order, store, set-up, and take your medications without assistance or supervision. You need reminders only.) Not available in all states. 2points

☐ Do you need 3-4 reminders per day ONLY in order to safely take your medications? (You are able to order, store, set-up, and take your medications without assistance or supervision. You need reminders only.) Not available in all states. 3points

☐ Do you need 5-6 reminders per day ONLY in order to safely take your medications? (You are able to order, store, set-up, and take your medications without assistance or supervision. You need reminders only.) Not available in all states. 4points

☐ Do you need 7 or more reminders per day ONLY in order to safely take your medications? (You are able to order, store, set-up, and take your medications without assistance or supervision. You need reminders only.) Not available in a" states. 5points

Fig. 6

104	Letha Keel	<a href="#">+ 2012 - Charge by Levels Finalized Active - (03/22/2012)</a> <a href="#">Level 0 - 0 Points</a> <a href="#">03/22/2012 - 03/22/2012</a>	<a href="#">New</a>
-----	------------	--	---------------------

Fig. 7

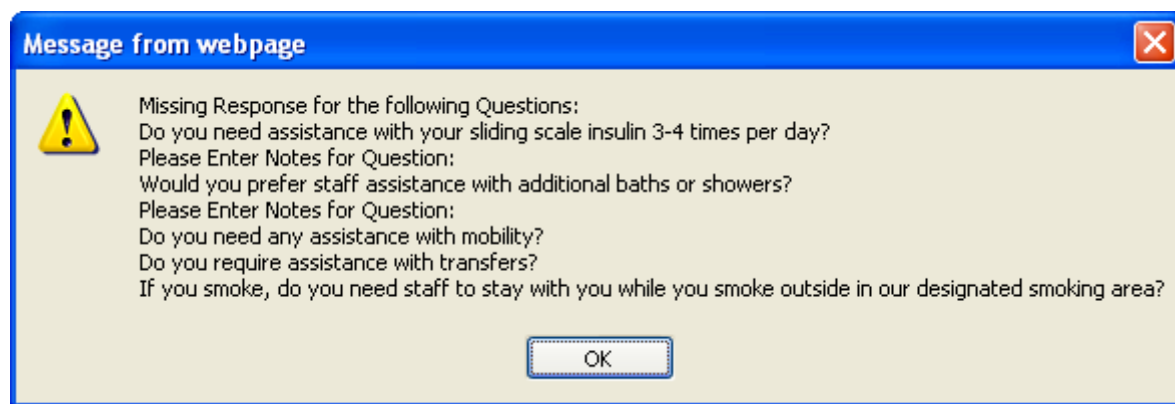


Fig. 8

X Find:  Previous Next Options ▾ 1 match

0 Points :: Level 0

☒ No ☐ Yes Do you need assistance with administration or supervision for medicated lotions, creams, ointments, or patches? 1 points

☒ No ☐ Yes Do you need assistance with administration or supervision for eye, ear, or nose drops or nasal sprays? 1 points

[remove notes : notes for this service will be discarded](#)

Fig. 8a

## OTHER ASSESSMENT FORM CHANGES

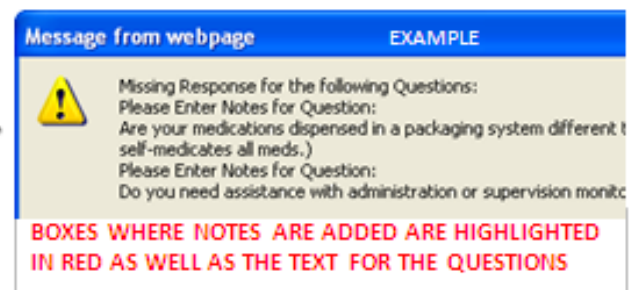
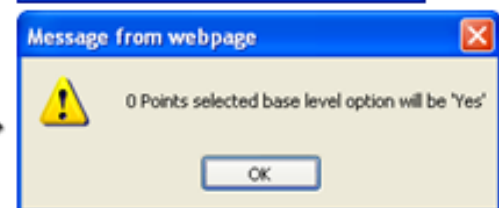
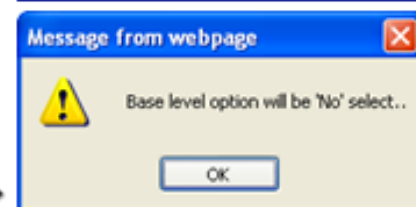
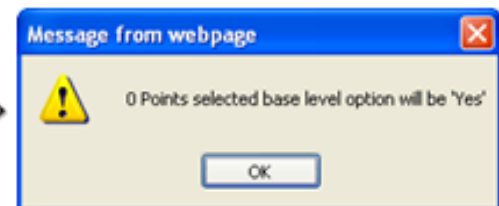
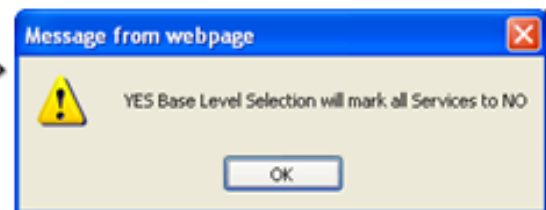
Changes to main categories and sub-categories are required as well as for the Base Level selection. Items to change include the following:

- Radial Button selections left unselected require the User to make a selection (Base Level “NO”)
- Checkboxes replaced by radial buttons (Medication Assistance, Treatments, Bathing, Dressing & Grooming, Mobility Transfer Export, Special Services)
- Some category/sub-category checkboxes changed to Yes/No questions (Medication Assistance, Treatments, Bathing, Bathroom Assistance, Dining Services, Orientation/Behavior/Safety, Pet Care, Lifestyle Habits, Special Services)
- New Category(s) – Safety Questions
- Diagnosis – This section will provide the User with seven drop-down list of 60 commonly used diagnosis. Up to 7 will be selectable with the 1<sup>st</sup> selection being the primary diagnosis.

[Top of the Document](#)

- Base Levels Information:

SELECTING A BASE LEVEL			
SELECT BASE LEVEL		RESULT	NOTES
YES		ALL "NO" QUESTIONS ARE SELECTED - USER IS MESSAGED	ANY NOTE INFORMATION WILL <u>NOT</u> BE CLEARED
NO		NOTHING IS SELECTED - USER TO ANSWER QUESTIONS. ANY QUESTION ALREADY SELECTED WILL BE CLEARED	ANY NOTE INFORMATION WILL <u>NOT</u> BE CLEARED
USER DOES <u>NOT</u> SELECT BASE LEVEL BUT SELECTS YES OR NO QUESTIONS TO START			
ANY POINT QUESTIONS SELECTED?	BASE LEVEL DEFAULTS TO:	RESULT	NOTES
YES	NO	NO MESSAGE	ANY NOTE INFORMATION WILL <u>NOT</u> BE CLEARED
NO	YES WHEN SAVING	USER IS MESSAGED	ANY NOTE INFORMATION WILL <u>NOT</u> BE CLEARED
SAVING OR FINALIZING AN ASSESSMENT WITHOUT SELECTING BASE LEVEL			
ANY POINT QUESTIONS SELECTED?	BASE LEVEL DEFAULTS TO:	RESULT	NOTES
YES	NO	USER IS MESSAGED	ANY NOTE INFORMATION WILL <u>NOT</u> BE CLEARED
NO	YES	USER IS MESSAGED THE BASE LEVEL IS YES - THEY MUST ANSWER EVERY QUESTION	ANY NOTE INFORMATION "WILL" BE CLEARED
ANY YES QUESTIONS WITHOUT NOTES	N/A	USER IS MESSAGED	USER IS MESSAGED THAT THEY NEED TO PROVIDE NOTES FOR THE YES QUESTION POINTS





## ADMITTING DIAGNOSIS NOTES FIELD - ASSESSMENT TOOL ADDITION

The New Assessment will now provide an additional notes field for Admitting Diagnosis. The field will work the following ways:

- If a new assessment is created for a new tenant at move-in, the field will provide room for more details regarding the selections from the Diagnosis Types drop-down menu. Also, if the diagnosis you seek is not in the list, it can be added within the Admitting Diagnosis Notes to help keep track. Fig. 8
- If a new assessment is created for an existing tenant, the field will be populated (as shown below) by pulling the diagnosis notes from the past assessment form. If information is available within the field, the User should now select from the drop-down list and populate the diagnosis from Primary on down. Once selected, the User should remove those diagnoses from the Admitting Diagnosis Notes area and leave items that are not available in the drop-down before saving. Fig. 10

Date of Birth:	09/21/1961	Code Status:	CPR
Review Start Date	07/27/2012	Weight:	225 Lbs
Assessment Tool	2012 - Charge by Levels	Height:	5 Feet 11 Inches
Review Type:	180 day		
When will the next assessment be due:	01/23/2013		

Selected Options:

<b>Diagnosis Types:</b>	<b>Admitting Diagnosis Notes:</b>
Primary : Cardiac Dysrhythmias	Blind in left eye, Diverticulosis, Gout
Second : Deep Vein Thrombosis (DVT)-Blood Clots	
Third : Depression	
Fourth : Edema	
Fifth : Asthma	<b>Allergies:</b>
Sixth :	Seasonal
Seventh :	

Fig. 9

Date of Birth:	09/21/1961	Code Status:	CPR
Review Start Date	07/27/2012	Weight:	225 Lbs
Assessment Tool	2012 - Charge by Levels	Height:	5 Feet 11 Inches
Review Type:	180 day		
When will the next assessment be due:	01/23/2013		

Selected Options:

<b>Diagnosis Types:</b>	<b>Admitting Diagnosis Notes:</b>
Primary : Schizophrenia	paranoid Schizophrenia, chronic gingivitis, nicotine dependence, non specific skin erupt, hyperlipidemia, HTN, DM type 11
Second : Hyperlipidemia	glucoses intolerance, anxiety
Third : Hypertension (HTN)-High Blood Pressure	
Fourth : Diabetes (non-insulin dependent)	<b>Allergies:</b>
Fifth : Anxiety Disorder	ranitidine, haldo, thorazine, PCN
Sixth :	

Fig. 10