UDS-PRO® System
EDUCATIONAL RESOURCES
Uniform Data System
for Medical Rehabilitation
UDSmr offers subscribers and nonsubscribers a large array of educational services and products:

- **Workshops** (pages 1–4)
- **Certification** (page 5)
- **Consultations** (pages 6–7)
- **Resources** (pages 8–12)
- **Subscriptions** (page 13)
- **Association speakers** (page 13)

Each resource is described in this booklet, along with a reference that indicates the resource's suitability for all levels of rehabilitation professionals. UDSmr offers flexible scheduling, custom workshops, and consultations. Please contact us for more information about custom engagements.

**Contact information:**

**Main number:** 716-817-7800  
**Website:** www.udsmr.org  
**E-mail:** info@udsmr.org  
**Clinical support:** 716-817-7844, clinicalsupport@udsmr.org  
**Technical support:** 716-817-7834, techsupport@udsmr.org  
**Client services:** 716-817-7872, clientservices@udsmr.org  
**Chart audit/consultations:**
  - Kevin Gibson  
  - Co-manager of Education, Training, and Consultation  
  - 716-817-7822  
  - kgibson@udsmr.org
  - Carol Harper  
  - Co-manager of Education, Training, and Consultation  
  - 716-817-7823  
  - charper@udsmr.org

**Workshops:**

- Carole Stickels  
  - Education, Training, and Consultation Coordinator  
  - 716-817-7815  
  - cstickels@udsmr.org

Offerings, contact hours, and availability are subject to change. Please contact UDSmr for information.

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**PPS Coordinators Boot Camp**  
This 2-day workshop provides attendees with in-depth exposure to the regulations and policies surrounding the IRF PPS. This highly interactive, intensive seminar, which illustrates the roles and responsibilities of the PPS coordinator, includes a review of IRF PPS regulations and an overview of IRF-PAI coding and rating guidelines. Discussions of best practices and operational issues focus on descriptions of sample job responsibilities, successful IRF PPS implementation stories, and interdepartmental education. Each attendee takes home a comprehensive notebook of resources plus many ideas for enhancing day-to-day facility operations.  

**Suitable for:**  
- PPS coordinators, including nurses or therapists acting in this role

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**Rehabilitation Nursing: Documenting the Evidence and Supporting the Burden of Care**  
This workshop provides in-depth exposure to the CMS regulations and medical necessity requirements that serve as a foundation for the roles and responsibilities of rehabilitation nursing. Discussion includes documentation components that demonstrate rehabilitation nursing and illustrates how accurate rating of FIM® items provides support for the patient’s need for rehabilitation nursing. A review of FIM® item documentation is included.  

**Suitable for:**  
- Clinicians/nurses  
- PPS coordinators  
- Nurse managers  
- Program directors

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**NEW! Pre-Admission Process: Success Is in the Details**  
This workshop provides a comprehensive review of the pre-admission screening process. It emphasizes the importance of your pre-admission team, explains how to select the right person for the pre-screening position, and identifies the rehabilitation physician's responsibilities in this process. It also includes a review of Medicare's pre-screen requirements and provides examples of pre-screen documentation.  

**Suitable for:**  
- Clinicians/nurses  
- PPS coordinators  
- Managers/executives  
- Admission coordinators

*Most workshops are available as a live event or webinar.*
**Program Director Training: Becoming the CEO of Your Rehab Program**

This 2-day workshop is designed for those who are new to the program director’s role and those program directors/administrators who are looking to identify opportunities for improvement so that they can refocus their efforts on the key success factors that impact their program. The workshop focuses on managing key program components and identifying the key success factors for building and maintaining a successful rehabilitation program. Participants learn how to identify and avoid potential pitfalls and how to build relationships with key team members and hospital management. Topics include census development, marketing, admissions, compliance, managing the payment process, and the role of the medical director. Participants also learn how to utilize UDSmr® on-demand reports and PEM reports to identify program opportunities.

* Suitable for:
  - Program directors
  - Administrators

**Perfecting Your FIM® Accuracy**

This workshop helps clinicians understand how to accurately complete the function modifiers and FIM® items on the IRF-PAI. It contains many helpful hints, rating considerations, and patient scenarios.

* Suitable for:
  - Clinicians/nurses
  - Therapists
  - PPS coordinators
  - Program directors

**Building Blocks for Achieving Quality Outcomes: An In-depth Look at FIM® Ratings and Facility-Specific Opportunities for Improvement**

This workshop begins with an analysis of sample facility data and credentialing reports. This instruction can be carried over to your facility-specific reports to provide your staff members a clear picture of problematic areas related to FIM® ratings and their impact on your facility’s outcomes. Each FIM® item is part of a focused educational module that helps improve FIM® knowledge and documentation.

As an on-site session, this workshop has two options for delivery. The first option includes a review of your facility’s data and 8–10 modules, presented during a single day, that focus on the FIM® items most in need of improvement at your facility. The second option includes a review of your facility’s data and a presentation of all 18 FIM® items over 2 days.

* Suitable for:
  - Clinicians/nurses
  - Therapists
  - PPS coordinators
  - Program directors

**Conquering IRF PPS Coding**

This workshop provides attendees with their own facility’s on-demand Etiologic Diagnosis to IGC Report for the most recent 12 months. Participants review the report as the presenter identifies the most prominent etiologic diagnoses and comorbid conditions recorded for each IGC. The workshop includes a review of specific auditing tools and procedures needed to code accurately. Common coding errors, best practices, and interdisciplinary roles are addressed to ensure that the responsibility and accountability for coding are assigned appropriately to maximize each facility’s coding potential.

* Suitable for:
  - Medical record coders
  - PPS coordinators
  - Rehabilitation physicians
  - Therapists
  - Nurses
  - Program directors
  - HIM directors

**IRF-PAI vs. UB-04 Coding: Closing the Communication Gap**

This coding workshop is presented by a medical record coder (an independent contractor of UDSmr®) with the intent of closing the gap between IRF-PAI coding and UB-04 coding. It emphasizes the importance of developing a line of communication between the rehabilitation department and the medical records department to ensure that both the IRF-PAI and the UB-04 represent each case appropriately. The workshop includes scenarios that illustrate the differences in coding and outcomes when these forms are completed accurately.

* Suitable for:
  - HIM directors
  - Medical record coders
  - PPS coordinators
  - Program directors
  - Case managers
  - Rehabilitation physicians

**Documenting the IRF Admission: The Physician’s Role**

Rehabilitation physicians have struggled to identify the appropriate level and specificity of documentation required by CMS to confirm that a patient’s admission to an acute inpatient rehabilitation unit is reasonable and necessary for the treatment of the patient’s condition. The workshop includes a review and discussion of the 2010 Medicare Benefit Policy Manual criteria for acute inpatient rehabilitation admissions, and it provides direction and recommendations for how rehabilitation physicians can successfully manage and document cases in the IRF environment to comply with the new physician responsibilities.

* Suitable for:
  - Rehabilitation physicians
  - PPS coordinators
  - Healthcare executives
  - Administrators
  - Program directors

* Most workshops are available as a live event or webinar.
Building Patient Volume While Managing Compliance
This session focuses on enhancing the referral development process, building census, and maintaining compliance. It also explains how to maintain the referral development effort when team members are functioning in dual roles.

Suitable for:
- Program directors
- Admission coordinators
- Marketing/business development managers and representatives

UDS-PRO® Software Workshop
This subscribers-only workshop explains the how, the why, and the when of UDS-PRO® software data entry and data transmission to CMS. Attendees learn how to extract data from the UDS-PRO® software and how to use Microsoft® Excel, Microsoft® Access 2000, and Crystal Reports to analyze facility outcomes. This workshop is designed for users of either software (desktop or Internet).

Suitable for:
- Staff responsible for data entry/analysis
- PPS coordinators
- Program directors

UDS-PRO® Data: How to Interpret It Statistically and Apply It Clinically
This subscribers-only workshop provides attendees with the knowledge they need to quickly and accurately assess their facility's UDS-PRO® data. It also helps them identify statistically and clinically significant outcomes and teaches them how this information can help them manage their rehabilitation programs. The report portion of the workshop answers specific questions regarding program outcomes and report interpretation. This workshop is presented by both a clinical expert and a statistical expert. Hands-on group exercises accompany the presentation.

Suitable for:
- PPS coordinators
- Program directors
- Administrators

Certification

PPS Coordinator Certification Program
Our new PPS Coordinator Certification Program recognizes the knowledge and competency of individuals regarding IRF PPS guidelines and standards in the inpatient rehabilitation industry. By completing the certification preparation course and passing the UDSmr® PPS Coordinator Certification Exam, a PPS coordinator demonstrates a higher understanding of the required guidelines and standards.

The certification course is a 3-day workshop:
- Day 1: This review day focuses on topics from the PPS Coordinators Boot Camp.
- Days 2 and 3: This portion focuses on a demonstration of how to accurately complete an IRF-PAI form and an intense review of documentation in a medical record to determine its compliance with the Medicare Benefit Policy Manual.

Benefits include:
- Establishing expertise in IRF PPS regulations and outcomes management
- Developing leadership in complying with Medicare IRF regulations
- Optimizing compliance and reimbursement

Prerequisites:
1. Completion of the UDSmr® PPS Coordinators Boot Camp (post-January 1, 2010, implementation of the Medicare Benefit Policy Manual) or, in the absence of Boot Camp attendance, basic knowledge demonstrated through a competency test
   All candidates who fail their first attempt at passing the competency exam must attend a Boot Camp before registering for the certification course.
2. A grade of 88.8% or higher (32 of 36 correct) on a licensed FIM® mastery test
3. Six months' clinical experience in an inpatient rehabilitation facility

Certification requirements:
1. Attendance at the UDSmr® PPS Coordinator Certification Course
2. A grade of 85% or higher on the UDSmr® PPS Coordinator Certification Exam, taken at a later date

Recommendations:
- Basic UDS-PRO® software training, including on-demand reporting features
- Participation in the Perfecting Your FIM® Accuracy webinar series
- Participation in the Conquering IRF PPS Coding webinar series

Regulations:
- The competency exam for demonstrating basic knowledge (in lieu of attending the Boot Camp) will be delivered online. The fee for this exam is $125. Proctoring guidelines will be enforced. The passing grade for the competency exam is 90%.
- The registration fee for the certification course and certification exam is $799.
- The certification exam will be delivered online. Proctoring guidelines will be enforced.
- Any attendee who fails the first attempt to pass the certification exam may retake the exam after a 14-day waiting period. The retesting fee is $99.
- Certification is valid for 2 years. After 2 years, renewal examinations will be provided online for $99. A review book will be sold separately.
- Certification will be revoked for those who do not renew in a timely fashion or who fail the renewal exam. For those whose certification is revoked, attendance at the certification course will be required prior to the renewal attempt.

This is an individual certification. All candidates who take the exam will own the title for 2 full years and will carry the title with them in the event of a change in employment.

To learn more about this certification, call 716-817-7815.

*Most workshops are available as a live event or webinar.*
Consultations*

IRF Chart Audits
Trained and experienced clinicians will examine your facility’s medical records to determine how well your IRF documentation supports the Medicare Benefit Policy Manual changes, IRF-PAI coding, and your documentation requirements.

Our reviews are offered on-site or off-site and provide a variety of scope and depth:

- **Full chart audit:** This audit focuses on impairment group codes, FIM® ratings, comorbidity conditions, and documentation that supports the Medicare Benefit Policy Manual criteria.
- **Full chart audit, including a review of your facility’s UB-04 coding:** In addition to conducting the full chart audit described above, a medical record coder will review your facility’s records to ensure that the appropriate ICD-9-CM codes have been recorded on the UB-04 for the principal diagnosis, admission diagnosis, and primary secondary diagnosis. The coder will also determine whether the correct discharge disposition has been recorded and whether any scored comorbid conditions on the IRF-PAI are listed among the top eight diagnoses on the UB-04. Findings and recommendations will be provided to ensure accurate coding of both the IRF-PAI and the UB-04.

**Medicare Benefit Policy Manual audit:** This comprehensive review focuses on all the requirements outlined in the Medicare Benefit Policy Manual, including pre-admission assessments, post-admission physician evaluations, H&Ps, individualized plans of care, team conferences, and clinical assessments.

- **Financial risk analysis:** UDSm will identify your facility’s risk factors, determine the impact associated with each risk, and identify opportunities for revenue enhancement.
- **Physician documentation review:** A rehabilitation physician will review a sample of your facility’s medical records to identify areas of vulnerability and opportunity related to physician requirements.

CARF Survey Preparation
A current CARF® survey will help your facility prepare for an initial survey, a reaccreditation survey, or a correction of deficits. Each CARF standard will be thoroughly reviewed with appropriate staff members of your organization. This process includes a comprehensive review of the current standards. The consultation focuses on ensuring that your staff members understand the intent of the standards and that proper documentation is in place to demonstrate conformity.

Physician Consultations
UDSm offers three types of physician consultations:

- **Documentation review:** An experienced rehabilitation physician will conduct an in-depth review of all rehabilitation physician documentation in your medical records, including your facility’s pre-admission screening tools, the post-admission physician evaluation/H&P, the plan of care, team conferences, daily progress notes, and physician discharge summaries. After conducting the review, the rehabilitation physician will make recommendations for improving your physicians’ clinical practices.

- **One-on-one consultation:** An experienced rehabilitation physician will shadow your facility’s medical director and physicians in the inpatient rehabilitation setting and provide education about their responsibilities. Topics include the Medicare Benefit Policy Manual rules and regulations, compliance with all PPS physician responsibilities, and physician documentation strategies.

- **Physician workshop:** This lecture focuses on the Medicare Benefit Policy Manual changes, including those related to the physician’s documentation responsibilities. Topics include the 60% rule, CMGs, documentation that supports CMS’s guidelines for the patient’s admission and continued stay, impairment group coding, etiologic diagnoses, comorbid conditions, and complications. Particular attention is given to areas of need identified by the documentation review. This highly interactive workshop is followed by a Q&A period.

All three physician consultation opportunities are available as standalone sessions. They also can be combined as part of a dynamic, multi-faceted program that helps ensure efficient compliance with CMS’s regulations.

Consultations*

On-site PPS Coordinator Consultation
UDSm provides a personalized, one-on-one consultation with your facility’s PPS coordinator to ensure that your facility is following CMS’s guidelines and that its processes are appropriate and efficient. Whether your PPS coordinator is new to the role or has years of experience, UDSm will customize your on-site consultation to meet your facility’s needs and will set target dates to assist your organization with this position.

**Observing/shadowing day-to-day operations and identifying the PPS coordinator’s role:**

- Review/develop job description
- The referral/admission process
- Data collection and IRF-PAI completion
- ICD and etiologic diagnosis
- FIM® ratings
- Comorbid conditions
- Complications
- Transmitting data—process and timeliness
- Communicating with:
  - Physicians
  - Clinical staff
  - Medical records department
  - Billing department

**Data analysis and reports:**

- FIM® Change Report
- Scoring Report
- Frequency of FIM® Ratings Report
- LOS Efficiency Report
- Etiologic Diagnosis by Impairment Group Code Report

**Monitoring compliance:**

- The 60% rule
- The 3-hour therapy guideline
- Medicare Benefit Policy Manual documentation requirements

Education:

- Policies and procedures
- Rules and regulations
- FIM® ratings (accuracy and documentation)
- Coding

Appeals Management
Do you know what to do when you receive a request for a medical record or a payment denial notice? Preparing yourself for these requests can be difficult, but it is essential. Knowing the following information is key:

- **Who will get these requests?**
- **Who will be in charge?**
- **Who needs to be informed and involved?**
- **What are the risks—financial, legal, staffing, etc.?**
- **What information needs to be provided, in what format, and by when?**

Our highly experienced appeals team will assist you at all levels of the appeals process.

Custom Consultations
Our training and consultation services are the most expertly performed in the industry, and our tools and programs are designed to guide every aspect of staff training, documentation, and Medicare compliance. Examples of our custom consultations are listed below. Contact us for a proposal based on your facility’s specific needs.

- **Rehabilitation nursing:** Our consultants will observe and assess your facility’s interdisciplinary team process and will identify areas of opportunity for improvement.

- **Program management:** Our consultants will observe and assess your facility’s interdisciplinary team process, its compliance with CMS’s regulations, and its efforts to build patient census. They also will identify related risks, strengths, and areas of opportunity.

* Any of UDSm’s chart audits or consultations can be combined with our workshops for a dynamic educational experience.
The IRF-PAI Training Video
Available in DVD format, this 63-minute video includes a review of all 18 FIM® items and the function modifiers. Scenarios for actual patients are incorporated throughout the video to illustrate proper IRF-PAI rating.

Suitable for:
- Clinicians/nurses
- PPS coordinators
- Program directors
- Students
- Nursing assistants
- Clinical technicians

Unlicensed Personnel Module
This module illustrates the importance of unlicensed personnel (UP) to the rehabilitation team. The FIM® items are grouped to outline tasks that must be observed and reported to a clinician to obtain accurate ratings for all 18 items. Available in CD-ROM format, this module includes a presentation, a facilitator’s guide, and a certificate of completion.

Suitable for:
- Students
- Nursing assistants
- Clinical technicians

Interdisciplinary IRF Documentation Forms
These interdisciplinary templates comply with the CMS documentation requirements that became effective for patients discharged on or after January 1, 2010. They are available as Adobe® PDF files or as customizable Microsoft® Word documents. The following forms are included in this packet:
- Pre-Admission Screening Form
- Post-Admission Physician Evaluation Form (PAPE/H&P)
- Interdisciplinary Admission Evaluation Form
- Bedside Swallow Evaluation
- Individualized Plan of Care Form
- Weekly Team Conference Form
- Physician Progress Note Form
- Physician Discharge Summary Form

Suitable for:
- Clinicians/nurses
- PPS coordinators
- Physicians

UDSMr® IRF-PAI Flow Sheet
Use this documentation form to track interdisciplinary FIM® ratings and to assist your facility with IRF PPS compliance. The flow sheet is available as a standard PDF file or a customizable Microsoft® Word document.

Suitable for:
- Clinicians/nurses
- PPS coordinators

The Rehabilitation Physician’s Guide to IRF Documentation
This resource provides physicians with the up-to-date information they need to provide documentation that both supports the Medicare Benefit Policy Manual’s “reasonable and necessary” criteria and justifies a continued rehabilitation stay. This collection of templates and examples can be used for written or dictated documentation systems. The guide includes documentation tools that will help physicians choose the correct IGC and etiologic diagnosis at admission, track complications throughout the rehabilitation stay, and record special coding considerations for more complicated cases. A reference section with website addresses for important CMS documents is also provided in this all-in-one, user-friendly guide.

This guide comes packaged with the rehabilitation physician documentation review template. (See below.)

Suitable for:
- Rehabilitation physicians

Rehabilitation Physician Documentation Review Template
You can use this audit tool, which has been piloted by our rehabilitation physician consultants and subscribing IRFs, to monitor your rehabilitation physicians’ compliance with documentation requirements and to identify educational opportunities. This user-friendly tool, available as a PDF form, is designed to automatically calculate a score for each rehabilitation physician as the review is conducted.

Suitable for:
- Clinicians
- PPS coordinators
- Rehabilitation physicians
**FIM® Level Definitions for the IRF-PAI Poster**

This guide provides a good view of the general descriptions of the FIM® instrument’s levels of function and their ratings.

**Suitable for:**
- Clinicians/nurses
- PPS coordinators
- Managers/executives

**Impairment Group Cards**

These laminated cards assist clinicians who select IGCs for the IRF PPS. Clinicians can keep these cards at their fingertips for easy reference. Each pack includes 25 cards.

**Suitable for:**
- Clinicians/nurses
- PPS coordinators
- Coders
- Rehabilitation physicians
- Managers/executives

**Resources**

**Guide to Documenting Rehabilitation Nursing**

This guide is designed to educate rehabilitation nurses about their role in the IRF PPS and to explain how nurses can provide accurate, defensible documentation that can be used to complete the IRF-PAI. It promotes documentation that complies with CMS’s medical necessity requirements, that justifies the patient’s inpatient rehabilitation admission, and that supports the patient’s stay as “reasonable and necessary” regarding the 24-hour provision of rehabilitation nursing.

This resource is available as an Adobe® PDF file and as a customizable Microsoft® Word document with nursing evaluations and flow sheets.

**Suitable for:**
- Clinicians/nurses
- PPS coordinators
- Managers/executives

**FIM® Reusable Scoring Cards for the UDS-PRO® System**

These reusable tools help the busy clinician who is performing assessments on the rehabilitation unit.

**Suitable for:**
- Clinicians/nurses
- PPS coordinators
- Rehabilitation physicians

**IRF-PAI Mouse Pad**

Always at your fingertips, this mouse pad displays the generic UDS-PRO® decision tree.

**Suitable for:**
- Clinicians/nurses
- PPS coordinators
- Medical record coders
- Rehabilitation physicians
- Managers/executives

**IRF-PAI Impairment Group Coding Tutorial**

This tutorial was designed to enhance the understanding of correct IGC selection and rationales for the IRF-PAI. This interactive CD-ROM, which offers 125 multiple-choice questions plus printable rationales and scoring, is ideal for clinicians, medical record coders, PPS coordinators, and others who select IGCs for the IRF-PAI. The tutorial is a self-study item that staff members can work through at their own pace.

**Suitable for:**
- Clinicians/nurses
- PPS coordinators
- Medical record coders

**IRF-PAI Rating Tutorial**

This tutorial is designed to enhance the clinician’s understanding of correct FIM® ratings and rationales for the IRF-PAI. This interactive CD-ROM, which offers 180 questions (plus answers and rationales) for the 18 FIM® items, is ideal for preparing clinicians to take the UDSmr® credentialing exam. The tutorial is a self-study item that clinicians can work through at their own pace.

**Suitable for:**
- Clinicians/nurses
- PPS coordinators
Clinical Support Subscriptions (nonsubscribers only)

Nonsubscribing facilities now have the option to turn to UDSmr with their questions about FIM® ratings and impairment group codes. Our staff members’ source knowledge of the IRF-PAI is why CMS selected UDSmr to develop The IRF-PAI Training Manual for the inpatient rehabilitation field.

Association/Conference Speakers

UDSmr is available to speak at association meetings and conferences on a wide range of topics, including:

- Program management
- Patient census management
- Rehabilitation nursing
- Outcomes management
- Medicare Benefit Policy Manual rules and regulations
- Documentation
- Appeals management

Presentation topics can be customized to the needs of the sponsoring organization.

Resources

The UDSPRO Central™ website gives UDSmr’s subscribers access to numerous free resources. These resources, which are updated as needed, include:

UDS® Pre-Admission Screening Form
This document complies with the CMS documentation requirements that became effective for patients discharged on or after January 1, 2010.

Motor FIM® Step Table
This Adobe® PDF file provides a simple chart that helps clinicians rate the FIM® items Grooming, Bathing, Dressing—Upper Body, Dressing—Lower Body, and Toileting. It also provides definitions and helpful hints for these five items.

Cognitive Step Table
This Adobe® PDF file provides a simple chart that helps clinicians rate the FIM® items Comprehension, Expression, Social Interaction, Problem Solving, and Memory. It also provides definitions and helpful hints for these five items.

Community Outing Scenario
This document follows a patient on a pre-discharge community outing, allowing the reader to rate several FIM® items throughout the trip.

Reverse ADL Scenario
This document presents a patient’s nightly routine, which the reader can use to rate several FIM® items.

Bladder/Bowel Guidelines
These helpful guidelines will help you rate the FIM® items Bladder Management and Bowel Management for patients who use adaptive equipment.

Complications Tracking Form
Use this template to track and correctly document complications that arise during the course of a patient’s rehabilitation stay.

FAQ
Do you have a question about UDSmr, a clinical issue, or a service we provide? Our list of frequently asked questions provides the answers!

FIM® Scenarios
This document’s basic FIM® scenarios can aid your efforts to provide FIM® education and training to your clinicians.

FIM® Self-Assessment
This self-assessment is designed to test the basic learner’s knowledge of the FIM® instrument.

Helpful Hints
This document contains helpful hints for rating the 18 FIM® items on the IRF-PAI.

IRF-PAI Rating Scenarios
This booklet contains matching exercises, answers, and rationales for each IRF-PAI item.

IRF-PAI Sample Flow Sheet
This one-page sample of our interdisciplinary flow sheet illustrates the IRF-PAI’s documentation requirements.

RIC-to-CMG Conversion Chart
This Adobe® PDF file shows the conversion of UDSmr® impairment group codes to RICs and CMGs based on the latest final rule from CMS.

Stroke Case Study
Designed for the advanced learner, this document provides your facility with a sample stroke case study that follows a patient through the first 3 days of the patient’s admission to inpatient rehabilitation.