

# **The UDSPRO Central™ User Guide**

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**Uniform Data System**

*Now part of Netsmart*

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# Getting Started

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## Minimum system requirements

To operate the UDSPRO Central™ software optimally, you must meet or exceed the following system requirements:

- One of the following:
  - PC with an Intel® Core™ i5 processor or comparable processor
  - Mac with an Apple® M1 Max processor or comparable processor
- 4 GB of RAM
- 1280 x 800 resolution
- One of the following operating systems:
  - Windows® 10 or later
  - Mac OS® Catalina or later
  - iOS 16 or later
- Latest version of Adobe® Reader® software

Only the latest versions of the following Internet browsers are supported:

- Microsoft® Internet Explorer\*
- Microsoft® Edge
- Mozilla® Firefox®
- Google Chrome™
- Apple® Safari®
- Mobile Safari®

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\* Enterprise Mode is **not** supported.

## Reading topics

The UDSPRO Central™ Help files contain a wealth of information related to the features and functions of the UDSPRO Central™ website and the UDS-PROi® software. This section explains the tools used in the Help files.

Two major tools help structure each topic:

1. Boldface
2. Notes

### Boldface

Boldface indicates a button you should click, a drop-down field you should open, a selection you should make, and similar items. Basically, if it's in **bold**, you should probably click it! For example, the instructions for deleting a case record might say, "Click the **Forms** menu, and then click the **Case Listing** button." In this case, you should click the Forms menu and then click the Case Listing button.

### Notes

Notes appear against a gray background (as in this example). They call your attention to particular aspects of the UDSPRO Central™ website or UDS-PROi® software.



## Logging in to the UDSPRO Central™ website

Before you attempt to log in to the UDSPRO Central™ website, make sure that your PC, monitor, and printer are on, and verify that your Internet connection is active.

### To log in to the UDSPRO Central™ website:

1. Open one of the recommended Internet browsers.
2. Enter **https://udsmrweb.med.buffalo.edu/udsprocentral** in the **Address** field. The UDSPRO Central™ Software Logon Information window will appear.
3. Enter your facility code in the **Facility Code** field.
4. Enter your username in the **Username** field.
5. Enter your password in the **Password** field.

If you forgot your password, enter your facility code and username in the fields provided, and then click the **Login** button. Your password will be emailed to the address associated with your username. When you receive the email, click the **OK** button, enter your password in the field provided, and continue with the login process.

6. Click the **Login** button. The UDSPRO Central™ Software window will appear.

## **Navigating the UDSPRO Central™ website**

The UDSPRO Central™ website is divided into two areas: the *navigation area* and the *information area*.

### **The Navigation Area**

The controls in the left column of the website constitute the navigation area. The following controls appear in this area:

- Home
- Admin
- Reports
- Data Management
- Subscriber Tools
- Clinical
- News
- Our Facility News

Clicking one of these will take you to a particular part of the website or make more options available.

### **The Information Area**

The area to the right of the navigation area is the information area. Selecting menu options will cause new windows to appear in this area. You can use these windows to view reports, read facility-specific news, and so on. You can also use these windows to enter patient data into the UDS-PROi® software, import and export cases, and so on.

## Obtaining help for the UDSPRO Central™ website

There are three major forms of UDSPRO Central™ help at your disposal:

1. The UDSPRO Central™ Help manual
2. *The UDS-PRO® Bulletin*
3. The Technical Support Department at UDSMR

### The UDSPRO Central™ Help manual

The UDSPRO Central™ Help manual contains instructions for using the website. You won't have much trouble finding it; in fact, you're using it right now!

### The UDS-PRO® Bulletin

*The UDS-PRO® Bulletin* is published periodically to provide subscribers with the latest news. It contains updates regarding new reports, software releases, upcoming features, and much more.

To subscribe to *The UDS-PRO® Bulletin*, send email to [udsmr\\_info@ntst.com](mailto:udsmr_info@ntst.com). Include your name, your facility code, and a brief description of your request in your correspondence.

### UDSMR's Technical Support Department

UDSMR's Technical Support Department is your live contact for help with the UDSPRO Central™ website and the UDS-PROi® software. You can contact the Technical Support Department by phone or email:

- **Phone:** Call 716-817-7834.
- **Email:** Send email to [udsmr\\_techsupport@ntst.com](mailto:udsmr_techsupport@ntst.com). Include your name, your facility code, and a brief description of your request in all correspondence.

## **Accessing UDSMR's website**

You can visit UDSMR's website directly from the UDSPRO Central™ website. UDSMR's website contains a wealth of information regarding upcoming events, educational opportunities, and much more.

To access UDSMR's website, click the UDSMR® logo that appears below the navigation area.

## Viewing announcements

The UDSPRO Central™ home page contains links to announcements from UDSMR. This area contains important information related to the website and the UDS-PROi® software, including announcements about scheduled outages.

### To view announcements:

1. Click the **Home** button. The Announcements area in the body of the page will display a list of links to any recently posted announcements.
2. Click the link to the announcement you want to read. The announcement details will appear on a new page. To print the announcement, click the **Print This Article** button.

## Logging out of the UDSPRO Central™ website

When you are finished using the site, be sure to log out! Closing the website properly prevents unauthorized personnel from gaining access to the website and your facility's patient records.

### To log out of the UDSPRO Central™ website:

1. Click the control in the upper right corner of the web page (the one with your name). A menu will appear.
2. Click **Sign out**. A confirmation dialog will appear.
3. Click the **OK** button to close the confirmation dialog. The UDSPRO Central™ Software Logon Information window will appear.
4. Click the **X** in the upper right corner of the login window to close it.

## **Managing Facilities**

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### **About facilities**

The UDSPRO Central™ website allows administrators to manage facility records for use at their sites. A facility record consists of a facility's name, its facility code, and other identifying information, including its address, Medicare Provider Number, and CMS-assigned Unique Facility ID Code. Multiple facilities can be accessed from a single UDS-PROi® database, and multiple user accounts can be assigned to each facility. Users with access to a facility can log in to the UDSPRO Central™ website and store information related to preadmission and patient data at the facility. System administrators can manage facility information and associated global records, as well as the facility's contact information, which UDSMR uses when contacting the facility. Separate contacts handle correspondence related to software, clinical issues, and so on.

## Editing facilities

Facility and corporate administrators can edit identifying information for facilities that have been created for their sites.

### To edit a facility:

1. Click the **Admin** button in the navigation area.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Make any necessary changes to the fields in the Facility area.

Field	Description
Name <sup>†</sup>	Facility name
Description	Facility description
Address <sup>†</sup>	Facility address
City <sup>†</sup>	City in which the facility is located
State <sup>†</sup>	State in which the facility is located, selected from the drop-down field
Zip Code <sup>†</sup>	Facility zip code
Medicare Provider # <sup>†</sup>	Facility Medicare Provider Number
Medicaid Provider #	Facility Medicaid Provider Number
Contact Person Name <sup>†</sup>	Name of the person at the facility responsible for contact with UDSMR
Contact Person Phone Number <sup>†</sup>	Phone number of facility contact
Ext.	Extension of facility contact's phone number

5. Make any necessary changes to the fields in the Intermediary area.

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<sup>†</sup> This field is required.



Field	Description
Name	Fiscal intermediary name
Federal Tax ID (EIN)	Federal Tax ID for corporations
Address	Fiscal intermediary address
City	City in which the fiscal intermediary is located
State	State in which the fiscal intermediary is located, selected from the drop-down field
Zip Code	Fiscal intermediary zip code
Contact Person Name	Name of contact person at fiscal intermediary
Contact Person Phone Number	Phone number of fiscal intermediary
Ext.	Extension of fiscal intermediary's phone number

6. Make any necessary changes to the fields in the PPS area.

Field	Description
CMS Assigned Unique Facility ID Code <sup>†</sup>	Facility code assigned by CMS
Medicare Cost Reporting Period	The first month of your facility's twelve-month Medicare cost reporting period
Facility Fiscal Year Start Date	The first month of your facility's annual fiscal year
Facility MAC/Fiscal Intermediary	The name of your facility's MAC or FI
Facility Type	Your facility's type, whether urban, rural, or critical access hospital

7. Click the **Save** button to save your changes. An information dialog will appear.
8. Click the **OK** button to close the information dialog.
9. Click the **Close** button to close the Facility Setup window.

## Managing PPS records

You can use the UDS-PROi<sup>®</sup> software to manage FPP information for your facility. This information includes CMS-assigned information such as your facility's wage index, LIP, and facility type. The UDS-PROi<sup>®</sup> software will update the FPP value for each case record in your database based upon the PPS records stored in your facility setup module.

When you create a new PPS record, the UDS-PROi<sup>®</sup> software will automatically provide your record with the CMS-assigned standard payment conversion factor (SPCF), rural adjustment value, and labor share value appropriate to the effective (starting) date for your PPS record:

Effective Date	SPCF	Rural Adjustment	Labor Share
01/01/2002	\$11,838	1.1914	0.72395
10/01/2002	\$12,193	1.1914	0.72395
10/01/2003	\$12,525	1.1914	0.72526
10/01/2004	\$12,958	1.1914	0.72359
10/01/2005	\$12,762	1.213	0.75865
10/01/2006	\$12,981	1.213	0.75612
10/01/2007	\$13,451	1.213	0.75818
04/01/2008	\$13,034	1.213	0.75818
10/01/2008	\$12,958	1.213	0.75464
10/01/2009	\$13,661	1.184	0.75779
04/01/2010	\$13,627	1.184	0.75779
10/01/2010	\$13,860	1.184	0.75271
10/01/2011	\$14,076	1.184	0.70199
10/01/2012	\$14,343	1.184	0.69981
10/01/2013	\$14,846	1.149	0.69494
10/01/2014	\$15,198	1.149	0.69294
10/01/2015	\$15,478	1.149	0.710

Your facility's wage index, LIP, and facility type are assigned by the Centers for Medicare and Medicaid Services. UDSMR has no access to this information.

A PPS record is valid from its effective date until today's date unless a PPS record with a later effective date exists, in which case the earlier PPS record is valid from its effective date until one day before the effective date of the later PPS record. The UDS-PROi<sup>®</sup> software compares each case's discharge date to the effective dates of all defined PPS records. If a facility defines a PPS record with an effective date of October 1, 2014, and a second PPS record with an effective date of October 1, 2015, the first PPS record will be valid for all discharges from October 1, 2014, until September 30, 2015.

### To manage PPS records:

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.

3. Select a facility from the **Facilities** drop-down field.
4. Click the **FPP** button in the PPS area. The FPP Information dialog will appear.
5. Make any necessary changes to your facility's PPS record information.
  - **To add a PPS record:**
    1. Click the **Add** button. The Add/Edit FPP Information dialog will appear.
    2. Select the record's effective date from the **Effective Date** calendar field, or enter it manually. The UDS-PROi<sup>®</sup> software will populate the SPCF, rural adjustment, and labor share fields with appropriate values from the final rule that applies to the effective date you entered.
    3. Enter your facility's wage index in the **Wage Index** field.
    4. Enter your facility's low-income patient ratio in the **LIP** field.
    5. Verify your facility's type (rural, urban, or hold harmless). If you need to switch types, select an option from the **Facility Type** drop-down field.
    6. Verify the standard payment conversion factor figure in the **SPCF** field.
    7. Verify the labor share figure in the **Labor Share** field.
    8. Enter your facility's teaching status adjustors.
      - **If your facility qualifies as a teaching facility:**
        1. Select **Yes** from the **Teaching** drop-down field.
        2. Enter your full-time equivalent adjustor in the **FTE** field.
        3. Enter your facility's census adjustor in the **Census** field.
      - If your facility does not qualify as a teaching facility, select **No** from the **Teaching** drop-down field.
  - 9. Click the **Save** button. An information dialog will appear.
  - 10. Click the **OK** button to close the information dialog.
  - 11. Click the **Close** button to close the Add/Edit FPP Information dialog.
- **To edit a PPS record:**
  1. Click the **Effective Date** link for the PPS record you want to edit. The Add/Edit FPP Information dialog will appear.
  2. Make any necessary changes to the PPS record.
  3. Click the **Save** button to save the record. An information dialog will appear.
  4. Click the **OK** button to close the information dialog.
  5. Click the **Close** button to close the Add/Edit FPP Information dialog.
- **To delete a PPS record:**
  1. Select the **Select** radio button to the left of the PPS record you want to delete.

2. Click the **Delete** button. A confirmation dialog will appear.
3. Click the **Yes** button to close the confirmation dialog. An information dialog will appear, indicating that the record has been deleted.
4. Click the **OK** button to close the information dialog.
6. Click the **Close** button to close the FPP Information dialog.
7. Click the **Close** button to close the Facility Setup window.

## Recalculating FPPs

The PPS area in the Facility Setup module contains a Calculate FPP button. You can use this feature to recalculate the federal prospective payments (FPPs) for patient records with CMGs at your facility. This feature is especially useful if you use the FPP button to change your facility's FPP information.

**Warning!** If you do not select any checkboxes in the Case Listing Selection Criteria area, the UDS-PROi® software will recalculate FPPs for all case records. If you do not select the Assessment Date Range checkbox in the Pre-admission Listing Selection Criteria area, the UDS-PROi® software will recalculate FPPs for all preadmission records.

### To recalculate FPPs:

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Click the **Calculate FPP** button in the PPS area. The Calculate FPP dialog will appear.
4. Select the records you want to recalculate.
  - **To select case records based on discharge date:**
    1. Select the **Discharge Date Range** checkbox.
    2. Enter a starting date or an ending date (or both) in the appropriate fields.
  - **To select case records based on admission date:**
    1. Select the **Update cases not discharged in the following admission date range** checkbox.
    2. Enter a starting date or an ending date (or both) in the appropriate fields. All cases admitted during the selected time frame (but not discharged) will be included in the recalculation.
  - **To select preadmission records based on preadmission assessment date:**
    1. Select the **Assessment Date Range** checkbox.
    2. Enter a starting date or an ending date (or both) in the appropriate fields.
5. Click the **Calculate** button. After the UDS-PROi® software recalculates the FPPs for the selected patient records, an information dialog will appear. This window displays the following information:
  - The number of records in the facility's database
  - The number of records updated
  - The number of records that do not have CMGs
  - The number of records that have one of the five "special CMGs"
6. Click the **OK** button to close the information dialog.
7. Click the **Close** button to close the Calculate FPP dialog.

8. Click the **Close** button to close the Facility Setup window.

The FPP calculation process takes time. If you have selected a large number of records for recalculation, expect a significant delay. Do not attempt to interrupt this process! If you feel that the recalculation process is taking too long, please contact UDSMR's technical support department at 716-817-7834 or [udsmr\\_techsupport@ntst.com](mailto:udsmr_techsupport@ntst.com).

## Managing cost records

The UDS-PROi<sup>®</sup> software allows you to define cost records for your facilities. A cost record typically contains a set of average costs that are used as a template if precise case costs are unavailable or impractical to enter for your facility. They provide you with a rough estimate of the total cost for a case.

You can use one or more of the following three methods to define a cost record:

1. Impairment group code (IGC)
2. Case-mix group (CMG)
3. Rehabilitation impairment code (RIC)

The RIC method is the most general, and the CMG method is the most specific. Each method allows you to define costs for an exhaustive list of subrecords. For example, defining a cost record by RIC allows you to set average costs for one or more of each of the twenty-one RICs.

You can define up to three methods for each cost record, but you can use only one of these methods to assign costs to a particular case record.

In addition to five user-defined custom fields, each cost method allows you to define cost averages for the following thirteen fields:

1. Acute Rehab
2. Supplies
3. Lab
4. OT
5. PT
6. Speech
7. RT
8. RT Supplies
9. Radiology
10. Durable Medical Equipment
11. RX
12. Indirect
13. Nonallocated

Finally, each cost record has an *effective date*. A cost record is valid from its effective date until today's date **unless** a cost record with a later effective date exists, in which case the older cost record is valid from its effective date until one day before the effective date of the newer cost record. When you assign a cost method to a case, the UDS-PROi<sup>®</sup> software compares the case's admission date to the effective dates of all defined cost records. If a facility defines a cost record with an effective date of January 1, 2001, and a second cost record with an effective date of January 1, 2002, the first cost record will be valid for all patients admitted between January 1, 2001, and December 31, 2001.

**To manage cost information for your facility:**

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Click the **Cost** button in the Settings area. The Facility Cost Information dialog will appear.
5. Enter your facility's cost record information.

- **To add a new cost template:**

1. Click the **Add Cost** button. The Add Effective Date dialog will appear.
2. Select the cost record's effective date from the **Effective Date** calendar field or enter it manually.
3. Click the **Save** button to close the Add Effective Date dialog.
4. Define the template costs.

- **To define costs by IGC:**

1. Select the **Impairment Group** radio button in the Cost Method area.
2. Enter the values you want to use in the fields provided.

- **To define costs by RIC:**

1. Select the **RIC** radio button in the Cost Method area.
2. Enter the values you want to use in the fields provided.

- **To define costs by CMG:**

1. Select the **CMG** radio button in the Cost Method area.
2. Enter the values you want to use in the fields provided.

- **To copy a cost template to a new template:**

1. Click the **Add Cost** button. The Add Effective Date dialog will appear.
2. Select the cost record's effective date from the **Effective Date** calendar field or enter it manually.
3. Click the **Save** button to close the Add Effective Date dialog.
4. Click the **Copy From** button. The Copy from Effective Date dialog will appear.
5. Select the effective date of the cost record you want to copy from the **Effective Date** drop-down field.
6. Click the **Save** button to close the Copy from Effective Date dialog.

- **To copy a cost template to an existing template:**

1. Select the effective date of the PPS record you want to overwrite from the **Effective Date** drop-down field.



2. Click the **Copy From** button. The Copy from Effective Date dialog will appear.
  3. Select the effective date of the cost record you want to copy from the **Effective Date** drop-down field.
  4. Click the **Save** button to close the Copy from Effective Date dialog.
- **To edit a cost template:**
    1. Select the effective date of the cost record you want to edit from the **Effective Date** drop-down field.
    2. Make any necessary changes to the template costs.
      - **To define costs by IGC:**
        1. Select the **Impairment Group** radio button in the Cost Method area.
        2. Enter the values you want to use in the fields provided.
      - **To define costs by RIC:**
        1. Select the **RIC** radio button in the Cost Method area.
        2. Enter the values you want to use in the fields provided.
      - **To define costs by CMG:**
        1. Select the **CMG** radio button in the Cost Method area.
        2. Enter the values you want to use in the fields provided.
  - **To delete a cost template:**
    1. Select the effective date of the cost record you want to delete from the **Effective Date** drop-down field.
    2. Click the **Delete Cost** button. A confirmation dialog will appear.
    3. Click the **Yes** button to close the confirmation dialog. After the record has been deleted, an information dialog will appear.
    4. Click the **OK** button to close the information dialog.
6. Click the **Save** button. An information dialog will appear.
  7. Click the **OK** button to close the information dialog.
  8. Click the **Close** button to close the Facility Cost Information dialog.
  9. Click the **Close** button to close the Facility Setup window.

## Managing custom fields

The UDS-PROi<sup>®</sup> software provides custom fields that facility administrators can use at their facilities. These fields are available in the following areas of the UDS-PROi<sup>®</sup> software:

- Case listing
- Preadmission listing
- Admission assessment
- Discharge assessment
- PAI fields (fields 116D to 116H and 117M to 117Q in the Cost tab of an open case record)
- UDSMR<sup>®</sup> reserved fields in the Identification tab of an open case record
- Interim/follow-up assessment
- Patient satisfaction survey
- Audit Denial Tracking System (Documentation, Appeal, QIC, ALJ, DAB, and FDC tabs)

The UDSMR<sup>®</sup> reserved fields are the only custom fields that transfer to UDSMR. You are limited to five custom fields for the PAI entities. You may create any number of custom fields for the other entities.

### To add a Boolean field:

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Click the **Custom Fields** button in the Settings area. The Custom Fields dialog will appear.
5. Select a custom field location from the **Entity** drop-down field. The options in this field correspond to the items that appear in the list at the beginning of this section.
6. Click the **Add** button. The Add/Edit Custom Fields dialog will appear.
7. Enter the field's name in the **Field Caption** field.
8. Select **BOOLEAN** from the **Data Type** drop-down field.
9. Select the field's default value (**Yes** or **No**) from the **Default Value** drop-down field. To leave the default value blank, select the blank line from the drop-down field.
10. Enter a description for the field in the **Description** field.
11. Select a show/hide status for the field.
  - To hide the field from view, select the **Do Not Show This Field** checkbox.
  - To leave the field on display for all users, clear the **Do Not Show This Field** checkbox.
12. Click the **Save** button. An information dialog will appear.
13. Click the **OK** button to close the information dialog.

14. Click the **Close** button to close the Add/Edit Custom Fields dialog.
15. Click the **Close** button to close the Custom Fields dialog.
16. Click the **Close** button to close the Facility Setup window.

**To add a date field:**

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Click the **Custom Fields** button in the Settings area. The Custom Fields dialog will appear.
5. Select a custom field location from the **Entity** drop-down field. The options in this field correspond to the items that appear in the list at the beginning of this section.
6. Click the **Add** button. The Add/Edit Custom Fields dialog will appear.
7. Enter the field's name in the **Field Caption** field.
8. Select **DATE** from the **Data Type** drop-down field.
9. Enter the field's default value in the **Default Value** field. To leave the default value blank, leave this field blank.
10. Enter a description for the field in the **Description** field.
11. Select a show/hide status for the field.
  - To hide the field from view, select the **Do Not Show This Field** checkbox.
  - To leave the field on display for all users, clear the **Do Not Show This Field** checkbox.
12. Click the **Save** button. An information dialog will appear.
13. Click the **OK** button to close the information dialog.
14. Click the **Close** button to close the Add/Edit Custom Fields dialog.
15. Click the **Close** button to close the Custom Fields dialog.
16. Click the **Close** button to close the Facility Setup window.

**To add a decimal field:**

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Click the **Custom Fields** button in the Settings area. The Custom Fields dialog will appear.
5. Select a custom field location from the **Entity** drop-down field. The options in this field correspond to the items that appear in the list at the beginning of this section.
6. Click the **Add** button. The Add/Edit Custom Fields dialog will appear.
7. Enter the field's name in the **Field Caption** field.

8. Select **DECIMAL** from the **Data Type** drop-down field.
9. Enter the field's maximum length in the **Max Length** field.
10. Enter the field's default value in the **Default Value** field. To leave the default value blank, leave this field blank.
11. Enter a description for the field in the **Description** field.
12. Select a show/hide status for the field.
  - To hide the field from view, select the **Do Not Show This Field** checkbox.
  - To leave the field on display for all users, clear the **Do Not Show This Field** checkbox.
13. Click the **Save** button. An information dialog will appear.
14. Click the **OK** button to close the information dialog.
15. Click the **Close** button to close the Add/Edit Custom Fields dialog.
16. Click the **Close** button to close the Custom Fields dialog.
17. Click the **Close** button to close the Facility Setup window.

**To add an integer field:**

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Click the **Custom Fields** button in the Settings area. The Custom Fields dialog will appear.
5. Select a custom field location from the **Entity** drop-down field. The options in this field correspond to the items that appear in the list at the beginning of this section.
6. Click the **Add** button. The Add/Edit Custom Fields dialog will appear.
7. Enter the field's name in the **Field Caption** field.
8. Select **INTEGER** from the **Data Type** drop-down field.
9. Enter the field's maximum length in the **Max Length** field.
10. Enter the field's default value in the **Default Value** field. To leave the default value blank, leave this field blank.
11. Enter a description for the field in the **Description** field.
12. Select a show/hide status for the field.
  - To hide the field from view, select the **Do Not Show This Field** checkbox.
  - To leave the field on display for all users, clear the **Do Not Show This Field** checkbox.
13. Click the **Save** button. An information dialog will appear.
14. Click the **OK** button to close the information dialog.
15. Click the **Close** button to close the Add/Edit Custom Fields dialog.

16. Click the **Close** button to close the Custom Fields dialog.
17. Click the **Close** button to close the Facility Setup window.

**To add a combo box field:**

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Click the **Custom Fields** button in the Settings area. The Custom Fields dialog will appear.
5. Select a custom field location from the **Entity** drop-down field. The options in this field correspond to the items that appear in the list at the beginning of this section.
6. Click the **Add** button. The Add/Edit Custom Fields dialog will appear.
7. Enter the field's name in the **Field Caption** field.
8. Select **TEXT** from the **Data Type** drop-down field.
9. Select **Combo Box** from the **Display Type** drop-down field.
10. Select a list from the **List** drop-down field. If you have not yet created any lists, or if you want to make changes to a list before selecting it for use with the custom field, follow the directions below.

- **To add a list:**

1. Click the **Create List** button. The Add/Edit List dialog will appear.
2. Click the **Add List** button.
3. Enter a name for the list in the **List Name** field.
4. Enter an item code in the **List Item Code** field.
5. Enter a description for the item in the **List Item** field.
6. Click the **Save** button to save the item. An information dialog will appear.
7. Click the **OK** button to close the information dialog.
8. Repeat steps 4–7 for each item you want to add to the list.
9. Click the **Close** button to close the Add/Edit List dialog.

- **To edit a list:**

1. Click the **Create List** button. The Add/Edit List dialog will appear.
2. Select a list from the **List Name** drop-down field.
3. Click the **Edit List** button.
4. Make any necessary changes to the list.

- **To rename the list:**

1. Enter the new name in the **List Name** field.

2. Click the **Update List** button. An information dialog will appear.
3. Click the **OK** button to close the information dialog.
- **To add an item to the list:**
  1. Enter an item code in the **List Item Code** field.
  2. Enter a description for the item in the **List Item** field.
  3. Click the **Save** button to save the item. An information dialog will appear.
  4. Click the **OK** button to close the information dialog.
- **To remove an item from the list:**
  1. Select the radio button in the **Select** column that corresponds to the item you want to delete.
  2. Click the **Delete Item** button. A confirmation dialog will appear.
  3. Click the **Yes** button to confirm the deletion and close the confirmation dialog. After the item has been deleted, an information dialog will appear.
  4. Click the **OK** button to close the information dialog.
5. Click the **Close** button to close the Add/Edit List dialog.
- **To delete a list:**
  1. Click the **Create List** button. The Add/Edit List dialog will appear.
  2. Select a list from the **List Name** drop-down field.
  3. Click the **Delete List** button. A confirmation dialog will appear.
  4. Click the **Yes** button to confirm the deletion and close the confirmation dialog. An information dialog will appear.
  5. Click the **OK** button to close the information dialog.
  6. Click the **Close** button to close the Add/Edit List dialog.
11. Enter a description for the field in the **Description** field.
12. Select a show/hide status for the field.
  - To hide the field from view, select the **Do Not Show This Field** checkbox.
  - To leave the field on display for all users, clear the **Do Not Show This Field** checkbox.
13. Click the **Save** button. An information dialog will appear.
14. Click the **OK** button to close the information dialog.
15. Click the **Close** button to close the Add/Edit Custom Fields dialog.
16. Click the **Close** button to close the Custom Fields dialog.
17. Click the **Close** button to close the Facility Setup window.

**To add a text box field:**

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Click the **Custom Fields** button in the Settings area. The Custom Fields dialog will appear.
5. Select a custom field location from the **Entity** drop-down field. The options in this field correspond to the items that appear in the list at the beginning of this section.
6. Click the **Add** button. The Add/Edit Custom Fields dialog will appear.
7. Enter the field's name in the **Field Caption** field.
8. Select **TEXT** from the **Data Type** drop-down field.
9. Select **Text Box** from the **Display Type** drop-down field.
10. Enter the field's maximum length in the **Max Length** field.
11. Enter the field's default value in the **Default Value** field. To leave the default value blank, leave this field blank.
12. Enter a description for the field in the **Description** field.
13. Select a show/hide status for the field.
  - To hide the field from view, select the **Do Not Show This Field** checkbox.
  - To leave the field on display for all users, clear the **Do Not Show This Field** checkbox.
14. Click the **Save** button. An information dialog will appear.
15. Click the **OK** button to close the information dialog.
16. Click the **Close** button to close the Add/Edit Custom Fields dialog.
17. Click the **Close** button to close the Custom Fields dialog.
18. Click the **Close** button to close the Facility Setup window.

**To edit a custom field:**

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Click the **Custom Fields** button in the Settings area. The Custom Fields dialog will appear.
5. Select a custom field location from the **Entity** drop-down field. The options in this field correspond to the items that appear in the list at the beginning of this section.
6. Click once on the link in the **Field Caption** column that corresponds to the custom field you want to edit. The Add/Edit Custom Fields dialog will appear.
7. Make any necessary changes to the custom field.
  - To change the field's name, enter the new name in the **Field Caption** field.

- To change the field's type, select a type from the **Data Type** drop-down field. (For detailed instructions on combo box fields and lists, see the instructions for adding a combo box field.)
  - To change the field's maximum length, enter a number in the **Maximum Length** field. (This field is available only for decimal fields, integer fields, and text box fields.)
  - To change the field's default value, enter a value in the **Default Value** field, or select a value from the **Default Value** drop-down field.
  - To change the field's description, enter the new description in the **Description** field.
  - To hide the field from view, select the **Do Not Show This Field** checkbox.
  - To leave the field on display for all users, clear the **Do Not Show This Field** checkbox.
8. Click the **Save** button. An information dialog will appear.
  9. Click the **OK** button to close the information dialog.
  10. Click the **Close** button to close the Add/Edit Custom Fields dialog.
  11. Click the **Close** button to close the Custom Fields dialog.
  12. Click the **Close** button to close the Facility Setup window.

You will be unable to edit most characteristics of a custom field that is currently populated in your UDS-PROi® database.

**To delete a custom field:**

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Click the **Custom Fields** button in the Settings area. The Custom Fields dialog will appear.
5. Select a custom field location from the **Entity** drop-down field. The options in this field correspond to the items that appear in the list at the beginning of this section.
6. Select the radio button in the **Select** column that corresponds to the custom field you want to delete.
7. Click the **Delete** button. A confirmation dialog will appear.
8. Click the **Yes** button to delete the custom field and close the confirmation dialog. After the field has been deleted, an information dialog will appear.
9. Click the **OK** button to close the information dialog.
10. Click the **Close** button to close the Custom Fields dialog.
11. Click the **Close** button to close the Facility Setup window.

You cannot delete a custom field that is currently populated in your UDS-PROi® database.



## Setting password restrictions

As an administrator, you can set default password restrictions that apply to all users at your facility.

These are default restrictions. You can customize restrictions for each user at the user setup level.

### To set password restrictions:

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Use the options in the Settings area to set the password restrictions you want.
  - To force users to change their password each time they log in, select the **User should be forced to change password on next login** checkbox.
  - To specify the life span of each password, enter a number in the **Number of days before password will automatically expire** field.
  - To ensure that passwords never expire, enter **0** in the **Number of days before password will automatically expire** field.
  - To give advance warning of an expiring password, enter a number in the **Number of days prior to password expiration** field.
  - To avoid giving advance warning of an expiring password, enter **0** in the **Number of days prior to password expiration** field.
5. Click the **Save** button to save your changes. An information dialog will appear.
6. Click the **OK** button to close the information dialog.
7. Click the **Close** button to close the Facility Setup window.

## Customizing layouts

The UDS-PROi® software allows administrators to customize the default layouts of the Pre-admission Listing and Case Listing windows for all users at their facilities.

These are default restrictions. You can customize layouts for each user at the user setup level.

### To customize the default layout:

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility from the **Facilities** drop-down field.
4. Click the **Customize Layout** button in the Settings area. The Customize Layout dialog will appear.
5. Select a facility code from the **Facility** drop-down field.
6. Select a listing window from the **Screen** drop-down field.
7. Customize the list of fields on display.
  - **To add a field to view:**
    1. Click once on a field in the All Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
    2. Click the **Add** button. The selected field will appear in the Selected Fields display window.
  - **To move a field's position:**
    1. Click once on the field you want to move in the Selected Fields display window.
    2. Use the **Move Up** and **Move Down** buttons to move the field in relation to the other fields in the Selected Fields display window.
  - **To remove a field from view:**
    1. Click once on a field in the Selected Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
    2. Click the **Remove** button. The selected field will disappear from the Selected Fields display window.
8. Click the **Sort Options** button. The Sort Options dialog will appear.
9. Select a primary sorting field from the **Sort Items By** drop-down field.
10. Select a sorting option for the primary sorting field.
  - To sort the list in ascending order, select the **Asc** radio button.
  - To sort the list in descending order, select the **Desc** radio button.
11. Select up to two additional sorting fields from the **Then By** drop-down fields.

12. Select a sorting option for each field you selected in step 11.
13. Click the **Save** button. An information dialog will appear.
14. Click the **OK** button to close the information dialog.
15. Click the **Close** button to close the Sort Options dialog.
16. Click the **Close** button to close the Customize Layout dialog.
17. Click the **Close** button to close the Facility Setup window.

## Updating informatics data

The UDS-PROi<sup>®</sup> software gives you access to regional and national informatics data. You can use this data to compare your facility's results by CMG with those of other facilities from your region and across the nation.

### To update informatics data:

1. Click the **Admin** button.
2. Click the **Facility Setup** button. The Facility Setup window will appear.
3. Select a facility code from the **Facilities** drop-down field.
4. Click the **Update Informatics Data** button in the Settings area. After the update process is complete, an information dialog will appear.
5. Click the **OK** button to close the information dialog.
6. Click the **Close** button to close the Facility Setup window.

## Updating facility contact information

The UDSPRO Central™ website allows you to manage your facility contact information directly via the Internet.

### To update your facility's contact information:

1. Click the **Admin** button.
2. Click the **Facility Contacts** button. The Facility Contacts window will appear.
3. Click the arrow buttons to the left of each information area to expand and collapse the areas, or click the **Display All** button to expand and collapse them,
4. Make any necessary changes to your facility's information.
5. When you are finished, click the **Submit Facility Changes** button to save your changes. To cancel your changes, click the **No Changes** button instead.

## **Managing User Accounts**

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### **About user accounts**

Each UDSPRO Central™ user requires a user account to access the website. A UDSPRO Central™ user account consists of a username and a password. Each account is assigned to a group, given a number of associated privileges that determine the user's rights on the website, and granted access to one or more facilities.

## Understanding privileges and groups

Each user account has a number of privileges (permissions) and a group affiliation associated with it. You can select privileges separately for each user account, or you can assign predefined privileges by selecting a group for the account.

### Privileges

The Privileges dialog contains a number of checkboxes that you can use to set privileges for the open user account. These privileges are listed in ten separate areas that are keyed to the modules available to Internet users of the UDSPRO Central™ website:

1. Internet Setup
2. Forms
3. Reports
4. Communication
5. Database
6. On Demand Reporting
7. Published Reports
8. Subscriber Tools
9. Setup
10. Credentialing

The privileges associated with each of these ten areas are explained below.

### Internet Setup

The Internet Setup area contains the Facility Setup privilege, which is related to one task: registering and editing facilities for UDS-PROi® software users.

Privilege	Description
Facility Setup	Right to edit facility information; customize user passwords, settings, and layouts; and recalculate FPPs for patient records

## Forms

The Forms area contains privileges related to managing preadmission and case records.

Privilege	Description
Pre-admission Listing	Right to view and edit preadmission data in the Pre-admission Listing window <ul style="list-style-type: none"> <li>• None (no radio button selected): No rights</li> <li>• View: Right to view preadmission data in the Pre-admission Listing window</li> <li>• Read-only (R/O): Read-only access to view both preadmission data and individual preadmission records</li> <li>• Read/write (R/W): Full read and write access to view and edit both preadmission data and individual preadmission records, plus the right to send preadmission email notifications</li> </ul>
Pre-admission Signature	Right to sign off on a preadmission record <ul style="list-style-type: none"> <li>• None (no checkbox selected): No rights</li> <li>• Screener: Right to sign off as a preadmission screener</li> <li>• Physician: Right to sign off as a physician</li> </ul>
Case Listing	Right to view and edit case data in the Case Listing window <ul style="list-style-type: none"> <li>• None (no radio button selected): No rights</li> <li>• View: Right to view case data in the Case Listing window</li> <li>• Read-only (R/O): Read-only access to view both case data and individual case records</li> <li>• Read/write (R/W): Full read and write access to view and edit both case data and individual case records</li> </ul>
Locking	Right to lock and unlock case records in the Case Listing window
IRF-PAI Signature	Right to electronically sign a case record
Manage Audit Denials	Right to view and edit audit denial data <ul style="list-style-type: none"> <li>• None (no radio button selected): No rights</li> <li>• View: Right to view audit denial data</li> <li>• Read-only (R/O): Read-only access to view audit denial data</li> <li>• Read/write (R/W): Full read and write access to view and edit audit denial data</li> </ul>
Demographic Import	Right to import patient demographic profiles into the UDS-PROi <sup>®</sup> software
FPP Calculator	Right to use the FPP Calculator to determine expected payment for a case, to view the FPP field in the Case Listing window, and to view the FPP field in the Patient Assessment Information window



Patient Satisfaction Survey	Right to use the Patient Satisfaction Survey module in the case listing to save patient satisfaction data
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### Reports

The Reports area contains privileges related to creating real-time reports based on patient data stored in the facility’s UDS-PROi® database.

Privilege	Description
Software Reports	Right to access and use the UDS-PROi® Software Reports module <ul style="list-style-type: none"> <li>• None (no checkbox selected): No rights</li> <li>• User: Right to access and use user reports</li> <li>• Executive: Right to access and use executive reports</li> </ul>
Scheduler Report	Right to access and use the Scheduler Report module, which allows the user to view Medicare cases by due date criteria
Profile Report	Right to generate a Section GG Profile Report or a FIM® Profile Report for a patient or a group of patients
Copy Patient Data	Right to copy patient data from the facility’s UDS-PROi® database for external reporting

### Communication

The Communication area contains privileges related to two tasks:

1. Preparing data for transmission to CMS
2. Rebuilding CMS transmission files

Privilege	Description
Prepare CMS File	Right to prepare data for transmission to CMS
Manage CMS Files	Right to rebuild a file previously prepared for transmission to CMS

### Database

The Database area contains privileges related to importing and exporting data stored in the facility’s UDS-PROi® database.

Privilege	Description
Import	Right to import data into the UDS-PROi® software <ul style="list-style-type: none"> <li>• None (no checkbox selected): No rights</li> <li>• Pre-admission Listing: Right to import data into the preadmission listing</li> <li>• Case Listing: Right to import data into the case listing</li> <li>• Patient Satisfaction Survey: Right to import patient satisfaction survey data into the case listing</li> </ul>

Privilege	Description
Export	<p>Right to export data from the UDS-PROi<sup>®</sup> software</p> <ul style="list-style-type: none"> <li>• None (no checkbox selected): No rights</li> <li>• CMG: Right to export CMG data</li> <li>• Pre-admission Listing: Right to export preadmission listing data</li> <li>• Case Listing: Right to export case listing data</li> <li>• Patient Satisfaction Survey: Right to export patient satisfaction data from the case listing</li> <li>• Dynamic Case Listing: Right to access the dynamic case listing export feature, which allows you to select data for inclusion in a case listing data export file</li> </ul>

### On Demand Reporting

The On Demand Reporting area contains privileges related to accessing on-demand reports, which compare your facility’s real-time data with national and regional benchmarks.

Privilege	Description
Access to On Demand	<p>Right to access on-demand reports</p> <ul style="list-style-type: none"> <li>• Management Reports: Right to access management-level on-demand reports</li> <li>• Corporate Information: Right to access corporate-level on-demand reports</li> </ul>

### Published Reports

The Published Reports area contains privileges related to accessing published quarterly reports, which compare your facility’s quarterly data with national and regional benchmarks.

Privilege	Description
Access to Published Reports	<p>Right to access published quarterly reports</p> <ul style="list-style-type: none"> <li>• Management Reports: Right to access management-level published quarterly reports</li> </ul>

### Subscriber Tools

The Subscriber Tools area contains a single privilege that governs a user’s ability to update a facility’s contact information.

Privilege	Description
Facility Contacts	Right to update facility contact information

### Setup

The Setup area contains privileges related to one task: managing user accounts.

Privilege	Description
User Setup	Right to create, edit, and delete user accounts

### Credentialing

The Credentialing area contains privileges related to one task: accessing administrative credentialing information.

Privilege	Description
Access to Credentialing Information	Right to access administrative credentialing information

By default, accounts affiliated with the Administrator group have the View User Sessions privilege. You cannot change this privilege manually for any account.

### Groups

You can use groups to assign a predefined set of privileges to a user account. There are fourteen available groups:

1. None
2. Clinician
3. PPS Coordinator
4. Billing
5. Administrator
6. Outcomes Report User
7. Physician
8. Pre-admission Screener
9. Clinician II
10. PPS Coordinator II
11. Billing II
12. Physician II
13. Pre-admission Screener II
14. Other

The privileges associated with each of these fourteen groups are explained below.

### None

A user account that belongs to the *None* group has no privileges. The user of this account will be able to execute only the following tasks:

- Change the account's password.
- Use the BMI Calculator.
- Visit UDSMR's website.

### **Clinician**

A user account that belongs to the *Clinician* group has the following privileges:

- Read/write privileges for the preadmission listing
- Read/write privileges for the case listing
- Demographic Import
- FPP Calculator
- Patient Satisfaction Survey
- User rights for the Software Reports module
- Scheduler Report
- Profile Report
- All export privileges in the Database area

### **PPS Coordinator**

A user account that belongs to the *PPS Coordinator* group has the following privileges:

- Read/write privileges for the preadmission listing
- Read/write privileges for the case listing
- Locking privileges for the case listing
- Demographic Import
- FPP Calculator
- Patient Satisfaction Survey
- All privileges in the Reports area
- All privileges in the Communication area
- All export privileges in the Database area

### **Billing**

A user account that belongs to the *Billing* group has the following privileges:

- View privileges for the preadmission listing
- Read-only privileges for the case listing
- FPP Calculator
- User rights for the Software Reports module
- Scheduler Report

- CMG Export

### **Administrator**

A user account that belongs to the *Administrator* group has all privileges. These include executive rights for the Software Reports module, read/write privileges for the preadmission listing, physician and preadmission screener privileges for signing off on preadmission records, read/write privileges for the case listing, locking and signing privileges for the case listing, and administrative rights to the credentialing module.

### **Outcomes Report User**

A user account that belongs to the *Outcomes Report User* group has the following privileges:

- Access to on-demand reports, including management reports
- All privileges in the Published Reports area

### **Physician**

A user account that belongs to the *Physician* group has the following privileges:

- Read/write privileges for the preadmission listing
- The physician privilege for preadmission signatures
- Read-only privileges for the case listing
- Read-only privileges for managing audit denial data
- User and executive rights for the Software Reports module
- Scheduler Report
- Profile Report
- Access to on-demand reports, including management reports
- All privileges in the Published Reports area

### **Pre-admission Screener**

A user account that belongs to the *Pre-admission Screener* group has the following privileges:

- Read/write privileges for the preadmission listing
- The screener privilege for preadmission signatures
- Read/write privileges for the case listing
- Read-only privileges for managing audit denial data
- Demographic Import
- FPP Calculator
- Patient Satisfaction Survey
- User and executive rights for the Software Reports module
- Scheduler Report

- Profile Report
- Import privileges for the preadmission listing
- Export privileges for the preadmission listing
- Export privileges for the dynamic export module
- Access to on-demand reports, including management reports
- All privileges in the Published Reports area

### **Clinician II**

A user account that belongs to the *Clinician II* group has all the privileges assigned to the Clinician group, plus the IRF-PAI signing privilege for the case listing.

### **PPS Coordinator II**

A user account that belongs to the *PPS Coordinator II* group has all the privileges assigned to the PPS Coordinator group, plus the IRF-PAI signing privilege for the case listing.

### **Billing II**

A user account that belongs to the *Billing II* group has all the privileges assigned to the Billing group, plus the IRF-PAI signing privilege for the case listing.

### **Physician II**

A user account that belongs to the *Physician II* group has all the privileges assigned to the Physician group, plus the IRF-PAI signing privilege for the case listing.

### **Pre-admission Screener II**

A user account that belongs to the *Pre-admission Screener II* group has all the privileges assigned to the Pre-admission Screener group, plus the IRF-PAI signing privilege for the case listing.

### **Other**

A user account that belongs to the *Other* group has custom privileges. You can use this group to assign custom privileges to a user account. To grant only the User Setup privilege to a user, for example, select **Other** from the **Group** drop-down field, and then select the **User Setup** checkbox.

## Creating user accounts

You can use the UDSPRO Central™ website to create user accounts for staff members at your facility. You can customize each account's password and associated expiration settings, privileges, facility access, and listing window layout.

### To create a user account:

1. Click the **Admin** button.
2. Click the **User Setup** button. The User Setup window will appear.
3. Click the **Add New User** button. The Add/Edit User window will appear. Each required field is marked with an asterisk.
4. Enter a username for the account in the **User Name** field. The username must consist of three to twenty alphanumeric characters. Usernames are not case-sensitive, so "UdSmR" and "udsmr" both allow access to the same account.
5. Enter the user's real name in the **Real Name** field.
6. Enter a password for the account in the **Password** field. This case-sensitive field must consist of eight to fifteen alphanumeric characters and must contain at least three of the following:
  - A lowercase letter
  - An uppercase letter
  - A digit (0–9)
  - A special character: ` ~ ! @ # \$ % ^ & \* ( [ { } ] ) - \_ = + ; : , \ / ? | "
 A password cannot match any of the last six passwords for the user account.
7. Reenter the password in the **Confirm Password** field.
8. Enter the user's title in the **Title** field.
9. Enter the user's phone number in the **Phone Number** field. Include the area code. If the user has a unique extension, enter the extension in the **Ext.** field.
10. Enter the user's email address in the **Email** field.
11. Select the **Active** checkbox.
12. If you would like the user to receive UDSPRO Central™ updates via email, select the **Send me UDSPRO Central™ updates via e-mail** checkbox.
13. Set the password restrictions you want.
  - To force the user to change the account password each time the user logs in, select the **User should be forced to change password on next login** checkbox.
  - To specify the life span of the account password, enter a number in the **Number of days before password will automatically expire** field.
  - To ensure that the password never expires, enter **0** in the **Number of days before password will automatically expire** field.

- To give advance warning of an expiring password, enter a number in the **Number of days prior to password expiration** field.
  - To avoid giving advance warning of an expiring password, enter **0** in the **Number of days prior to password expiration** field.
14. Click the **Add Facility** button. The Privileges dialog will appear.
  15. Select a facility from the **Facility Code** drop-down field.
  16. Assign privileges to the user account for the selected facility.
    - To assign predefined privileges to the account, select a template from the **Group** drop-down field.
    - To assign privileges manually, select **99 – Other** from the **Group** drop-down field, and then select privileges for the account.
  17. Click the **Save** button to save your changes and close the Privileges dialog.
    - **To revoke access to a facility:**
      1. Click the **Remove** link in the Remove Facility column for the facility you want to remove. A confirmation dialog will appear.
      2. Click the **Remove** button to confirm your selection, remove the facility, and close the confirmation dialog.
- Each account must have at least one facility assigned to it.
18. Click the **Edit** link in the Layout column for the selected facility. The Customize Layout dialog will appear.
  19. Customize the default layout and sorting options for the account.
    - **To customize the layout:**
      1. Select a listing window from the **Screen** drop-down field.
      2. Customize the list of fields on display.
        - **To add a field to view:**
          1. Click once on a field in the All Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
          2. Click the **Add** button. The selected field will appear in the Selected Fields display window.
        - **To move a field's position:**
          1. Click once on the field you want to move in the Selected Fields display window.
          2. Use the **Move Up** and **Move Down** buttons to move the field in relation to the other fields in the Selected Fields display window.



- **To remove a field from view:**
  1. Click once on a field in the Selected Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows<sup>®</sup> application.)
  2. Click the **Remove** button. The selected field will disappear from the Selected Fields display window.
- **To change the sorting options:**
  1. Select a listing window from the **Screen** drop-down field.
  2. Click the **Sort Options** button. The Sort Options dialog will appear.
  3. Select a primary sorting field from the **Sort Items By** drop-down field.
  4. Select a sorting option for the primary sorting field.
    - To sort the list in ascending order, select the **Asc** radio button.
    - To sort the list in descending order, select the **Desc** radio button.
  5. Select up to two additional sorting fields from the **Then By** drop-down fields.
  6. Select a sorting option for each field you selected in step 5.
  7. Click the **Save** button. An information dialog will appear.
  8. Click the **OK** button to close the information dialog.
  9. Click the **Close** button to close the Sort Options dialog.
- 20. Click the **Save** button. An information dialog will appear.
- 21. Click the **OK** button to close the information dialog.
- 22. Click the **Close** button to close the Customize Layout dialog.
- 23. Click the **Close** button to close the Add/Edit User window.
- 24. Click the **Close** button to close the User Setup window.

## Editing user accounts

You can use the UDSPRO Central™ website to edit user accounts for staff members at your facility. You can customize each account's password and associated expiration settings, privileges, facility access, and listing window layout.

### To create a user account:

1. Click the **Admin** button.
2. Click the **User Setup** button. The User Setup window will appear.
3. Click the link in the **User Name** column that corresponds to the account you want to edit. The Add/Edit User window will appear. Each required field is marked with an asterisk.
4. Make any necessary changes to the account.
  - To change the user account's password, enter the new password in the **Password** field and then reenter it in the **Confirm Password** field. This case-sensitive field must consist of eight to fifteen alphanumeric characters and must contain at least three of the following:
    1. A lowercase letter
    2. An uppercase letter
    3. A digit (0–9)
    4. A special character: ` ~ ! @ # \$ % ^ & \* ( [ { } ] ) - \_ = + ; : , \ / ? | "

A password cannot match any of the last six passwords for the user account.
  - To force the user to change the account password each time the user logs in, select the **User should be forced to change password on next login** checkbox.
  - To specify the life span of the account password, enter a number in the **Number of days before password will automatically expire** field.
  - To ensure that the password never expires, enter **0** in the **Number of days before password will automatically expire** field.
  - To give advance warning of an expiring password, enter a number in the **Number of days prior to password expiration** field.
  - To avoid giving advance warning of an expiring password, enter **0** in the **Number of days prior to password expiration** field.
  - **To grant access to a facility:**
    1. Click the **Add Facility** button. The Privileges dialog will appear.
    2. Select a facility from the **Facility Code** drop-down field.
    3. Assign privileges to the user account for the selected facility.
      - To assign predefined privileges to the account, select a template from the **Group** drop-down field.

- To assign privileges manually, select **99 – Other** from the **Group** drop-down field and then select privileges for the account.
- 4. Click the **Save** button to save your changes and close the Privileges dialog.
- **To revoke access to a facility:**
  1. Click the **Remove** link in the Remove Facility column for the facility you want to remove. A confirmation dialog will appear.
  2. Click the **Remove** button to confirm your selection, remove the facility, and close the confirmation dialog.

Each account must have at least one facility assigned to it.

- **To edit the user’s privileges for a particular facility:**
  1. Click the **Edit** link in the Privileges column for the facility. The Privileges dialog will appear.
  2. Assign privileges to the user account for the selected facility.
    - To assign predefined privileges to the account, select a template from the **Group** drop-down field.
    - To assign privileges manually, select **99 – Other** from the **Group** drop-down field and then select privileges for the account.
  3. Click the **Save** button to save your changes and close the Privileges dialog.
- **To customize the account’s listing window layout:**
  1. Click the **Edit** link that appears in the Layout column of the facility you want to edit. The Customize Layout dialog will appear.
  2. Select a listing window from the **Screen** drop-down field.
  3. Customize the list of fields on display.
    - **To add a field to view:**
      1. Click once on a field in the All Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
      2. Click the **Add** button. The selected field will appear in the Selected Fields display window.
    - **To move a field’s position:**
      1. Click once on the field you want to move in the Selected Fields display window.
      2. Use the **Move Up** and **Move Down** buttons to move the field in relation to the other fields in the Selected Fields display window.

- **To remove a field from view:**
  1. Click once on a field in the Selected Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
  2. Click the **Remove** button. The selected field will disappear from the Selected Fields display window.
- 4. Click the **Save** button. An information dialog will appear.
- 5. Click the **OK** button to close the information dialog.
- 6. Click the **Close** button to close the Customize Layout dialog.
- **To change the account's listing window sorting options:**
  1. Click the **Edit** link that appears in the Layout column of the facility you want to edit. The Customize Layout dialog will appear.
  2. Select a listing window from the **Screen** drop-down field.
  3. Click the **Sort Options** button. The Sort Options dialog will appear.
  4. Select a primary sorting field from the **Sort Items By** drop-down field.
  5. Select a sorting option for the primary sorting field.
    - To sort the list in ascending order, select the **Asc** radio button.
    - To sort the list in descending order, select the **Desc** radio button.
  6. Select up to two additional sorting fields from the **Then By** drop-down fields.
  7. Select a sorting option for each field you selected in step 6.
  8. Click the **Save** button. An information dialog will appear.
  9. Click the **OK** button to close the information dialog.
  10. Click the **Close** button to close the Sort Options dialog.
  11. Click the **Close** button to close the Customize Layout dialog.
- 5. Click the **Save** button to save the changes to the account. An information dialog will appear.
- 6. Click the **OK** button to close the information dialog.
- 7. Click the **Close** button to close the Add/Edit User window.
- 8. Click the **Close** button to close the User Setup window.

## Changing passwords

You can use the UDSPRO Central™ website to change the password for each user account at your facility.

### To change a user account's password:

1. Click the **Admin** button.
2. Click the **User Setup** button. The User Setup window will appear.
3. Click the link in the **User Name** column of the account you want to edit. The Add/Edit User window will appear.
4. Enter a password for the account in the **Password** field. This case-sensitive field must consist of eight to fifteen alphanumeric characters and must contain at least three of the following:
  - A lowercase letter
  - An uppercase letter
  - A digit (0–9)
  - A special character: ` ~ ! @ # \$ % ^ & \* ( [ { } ] ) - \_ = + ; : , \ / ? | "A password cannot match any of the last six passwords for the user account.
5. Reenter the password in the **Confirm Password** field.
6. Click the **Save** button. An information dialog will appear.
7. Click the **OK** button to close the information dialog.
8. Click the **Close** button to close the Add/Edit User window.
9. Click the **Close** button to close the User Setup window.

## Setting password restrictions

UDSPRO Central™ administrators can set password restrictions for user accounts at their facilities.

User-level password restrictions take precedence over facility-level password restrictions.

### To set password restrictions for a user account:

1. Click the **Admin** button.
2. Click the **User Setup** button. The User Setup window will appear.
3. Click the link in the **User Name** column of the account you want to edit. The Add/Edit User window will appear.
4. Set the password restrictions you want.
  - To force the user to change the account password each time the user logs in, select the **User should be forced to change password on next login** checkbox.
  - To set the number of days before the password expires, enter a number in the **Number of days before password will automatically expire** field.
  - To ensure that the password never expires, enter **0** in the **Number of days before password will automatically expire** field.
  - To give advance warning of an expiring password, enter a number in the **Number of days prior to password expiration** field.
  - To avoid giving advance warning of an expiring password, enter **0** in the **Number of days prior to password expiration** field.
5. Click the **Save** button to save your changes. An information dialog will appear.
6. Click the **OK** button to close the information dialog.
7. Click the **Close** button to close the Add/Edit User window.
8. Click the **Close** button to close the User Setup window.

## Granting and revoking facility access

You can use the UDSPRO Central™ website to change the facility access for each user account.

### To change facility access for a user account:

1. Click the **Admin** button.
2. Click the **User Setup** button. The User Setup window will appear.
3. Click the link in the **User Name** column of the account you want to edit. The Add/Edit User window will appear.
4. Make any necessary changes to the account.
  - **To grant access to a facility:**
    1. Click the **Add Facility** button. The Privileges dialog will appear.
    2. Select a facility from the **Facility Code** drop-down field.
    3. Assign privileges to the user account for the selected facility.
      - To assign predefined privileges to the account, select a template from the **Group** drop-down field.
      - To assign privileges manually, select **99 – Other** from the **Group** drop-down field and then select privileges for the account.
    4. Click the **Save** button to save your changes and close the Privileges dialog.
  - **To revoke access to a facility:**
    1. Click the **Remove** link in the Remove Facility column for the facility you want to remove. A confirmation dialog will appear.
    2. Click the **Remove** button to confirm your selection, remove the facility, and close the confirmation dialog.

Each account must have at least one facility assigned to it.

- **To edit the user's privileges for a particular facility:**
    1. Click the **Edit** link in the Privileges column for a facility. The Privileges dialog will appear.
    2. Assign privileges to the user account for the selected facility.
      - To assign predefined privileges to the account, select a template from the **Group** drop-down field.
      - To assign privileges manually, select **99 – Other** from the **Group** drop-down field and then select privileges for the account.
    3. Click the **Save** button to save your changes and close the Privileges dialog.
5. Click the **Save** button to save your changes. An information dialog will appear.
  6. Click the **OK** button to close the information dialog.
  7. Click the **Close** button to close the Add/Edit User window.

8. Click the **Close** button to close the User Setup window.



## Customizing layouts

The UDS-PROi® software allows administrators to customize the layouts of the Pre-admission Listing and Case Listing windows for each user at their facilities.

User-level layout settings take precedence over facility-level layout settings.

### To customize the layout for a user account:

1. Click the **Admin** button.
2. Click the **User Setup** button. The User Setup window will appear.
3. Click the link in the **User Name** column of the account you want to edit. The Add/Edit User window will appear.
4. Click the **Edit** link that appears in the Layout column of the facility you want to edit. The Customize Layout dialog will appear.
5. Select a listing window from the **Screen** drop-down field.
6. Make any necessary changes to the account.
  - **To add a field to view:**
    1. Click once on a field in the All Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
    2. Click the **Add** button. The selected field will appear in the Selected Fields display window.
  - **To move a field's position:**
    1. Click once on the field you want to move in the Selected Fields display window.
    2. Use the **Move Up** and **Move Down** buttons to move the field in relation to the other fields in the Selected Fields display window.
  - **To remove a field from view:**
    1. Click once on a field in the Selected Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
    2. Click the **Remove** button. The selected field will disappear from the Selected Fields display window.
  - **To change the account's listing window sorting options:**
    1. Click the **Sort Options** button. The Sort Options dialog will appear.
    2. Select a primary sorting field from the **Sort Items By** drop-down field.
    3. Select a sorting option for the primary sorting field.
      - To sort the list in ascending order, select the **Asc** radio button.
      - To sort the list in descending order, select the **Desc** radio button.

4. Select up to two additional sorting fields from the **Then By** drop-down fields.
5. Select a sorting option for each field you selected in step 4.
6. Click the **Save** button. An information dialog will appear.
7. Click the **OK** button to close the information dialog.
8. Click the **Close** button to close the Sort Options dialog.
7. Click the **Save** button. An information dialog will appear.
8. Click the **OK** button to close the information dialog.
9. Click the **Close** button to close the Customize Layout dialog.
10. Click the **Close** button to close the Add/Edit User window.
11. Click the **Close** button to close the User Setup window.

## Unlocking user accounts

You can use the UDSPRO Central™ website to unlock accounts of users who have been locked out of the website after failing a certain number of login attempts.

### To unlock a user account:

1. Click the **Admin** button.
2. Click the **User Setup** button. The User Setup window will appear.
3. Click the link in the **User Name** column of the account you want to edit. The Add/Edit User window will appear.
4. Clear the **Locked** checkbox.
5. Click the **Save** button to save your changes. An information dialog will appear.
6. Click the **OK** button to close the information dialog.
7. Click the **Close** button to close the Add/Edit User window.
8. Click the **Close** button to close the User Setup window.

If you want to lock a user out of the system for an extended period, inactivate the account. For instructions, see page 54.

## Inactivating user accounts

You can use the UDSPRO Central™ website to inactivate user accounts for your facility. An inactivated account cannot be used to enter the UDSPRO Central™ website, but it is not deleted.

Inactivation is a live event. If you inactivate a user account currently logged into the UDSPRO Central™ website, the user will be informed of the inactivation and logged out of the site.

### To inactivate a user account:

1. Click the **Admin** button.
2. Click the **User Setup** button. The User Setup window will appear.
3. Click the link in the **User Name** column of the account you want to edit. The Add/Edit User window will appear.
4. Clear the **Active** checkbox.
5. Click the **Save** button to save your changes. An information dialog will appear.
6. Click the **OK** button to close the information dialog.
7. Click the **Close** button to close the Add/Edit User window.
8. Click the **Close** button to close the User Setup window.

To activate a user account, follow these instructions, but select the **Active** checkbox rather than clear it.

## Deleting user accounts

You can use the administrative features of the UDSPRO Central™ website to delete user accounts at your facility.

### To delete a user account:

1. Click the **Admin** button.
2. Click the **User Setup** button. The User Setup window will appear.
3. Click the link in the **User Name** column of the account you want to delete. The Add/Edit User window will appear.
4. Click the **Delete User** button. A confirmation dialog will appear.
5. Click the **Yes** button to confirm your selection, delete the user, and close the confirmation dialog. An information dialog will appear.
6. Click the **OK** button to close the information dialog.
7. Click the **Cancel** button to close the Add/Edit User window.
8. Click the **Close** button to close the User Setup window.

## Viewing logs

UDSPRO Central™ administrators can view log files that contain information related to user connectivity, user activity, and module usage, and case alteration.

Only a user whose account belongs to the Administrator group has this privilege.

### To view a log file:

1. Click the **Admin** button.
2. Click the **Audit Log** button. The Audit Log window will appear.
3. Select a log from the **Audit Level** drop-down field. Four logs are available:
  - **User Connectivity:** Information related to users logging in and out of the UDSPRO Central™ website
  - **User Activity:** The number of times a user accessed a particular module during each session
  - **Module Usage:** Detailed information regarding the access of any import, export, or report module
  - **Case Alteration:** A full list of alterations made to the preadmission and case listings
  - **User Account Alteration:** Detailed information about events related to security, including failed login attempts and changes to user accounts
4. Select a facility code from the **Facility** drop-down field. (To view the log for all facilities, select **All Facilities**.)
5. Enter a username in the **User Name** field. (To view the log for all users, leave this field blank.)
6. Use the **Date From** and **Date To** fields to limit the dates used to generate the log file. (To view the entire log, leave these fields blank.)
7. Click the **Search** button. The results of the search will appear in the display window.
8. When you are finished, click the **Close** button to close the Audit Log window.

## Viewing user sessions

The UDS-PROi<sup>®</sup> software allows you to view certain login information for each user at your facility.

Only a user whose account belongs to the Administrator group has this privilege.

### To view user sessions:

1. Click the **Admin** button.
2. Click the **User Sessions** button. The View User Sessions window will appear.
3. Use the features of the View User Session window to view the login information for users at your facility. Click the column headings to sort the list in ascending or descending order.
4. When you are finished, click the **Close** button to close the View User Sessions window.

## **Managing Filters**

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### **About filters**

Most of the display areas in the UDS-PROi<sup>®</sup> software can be filtered. A filter restricts the information on display. The restriction is based on the conditions defined in the filter. For example, you can define a filter that displays only discharged cases, another that displays only open (i.e., nondischarged) cases, and a third that displays Medicare-only cases. Applying one of these filters will restrict the information on display. Because filters allow you to view a subset of your data, they are especially useful if your database is very large.



## Creating filters

Most of the display areas in the UDS-PROi® software can be filtered. You can use the software's filtering features to limit the information on display.

### To create a filter:

1. Click the **Filter** button. The Filter dialog will appear.
2. Select the blank entry from the **Filter Name** drop-down field. The fields in the Available Fields display window will become active.
3. Define the fields you want to use in the filter.
  - **To add a field to the filter:**
    1. Click a field in the Available Fields display window.
    2. Select a logical operator from the drop-down field between the display windows.
    3. Enter one or more values in the fields below the drop-down field.
      - If you selected the IS NULL or IS NOT NULL operator in step 2, you will be unable to enter any values.
      - If you selected a field that has set values associated with it, such as Primary Pay Source, a selection button (...) will appear next to the field. Click the selection button, select the radio button that corresponds to your choice in the Lookup dialog that appears, and then click the **Select** button to close the Lookup dialog.
    4. Click the > button. The selected field and condition will appear in the display window on the right side of the Filter dialog.
      - **To overwrite a field filter:**
        1. Filter on the field a second time.
        2. Enter a new value for the filtered field.
        3. Click the > button. A confirmation dialog will appear.
        4. Click the **Yes** button to close the confirmation dialog and overwrite the field filter.
      - **To create an OR filter for a field:**
        1. Filter on the field a second time.
        2. Enter an additional value for the filtered field.
        3. Click the > button. A confirmation dialog will appear.
        4. Click the **No** button to close the confirmation dialog and add the condition to the field filter.
  - **To delete a field from the filter:**
    1. Click the field you want to delete.

2. Click the > button. The selected field and condition will be removed from the display window.
4. Repeat step 3 until you have defined the filter.
5. Close the filter.
  - **To close and save the filter:**
    1. Click the **Save Filter** button. The Filter Name dialog will appear.
    2. Enter a name for the filter in the **Filter Name** field.
    3. Click the **OK** button to close the Filter Name dialog. The filtered results will appear in the display window, and the filter drop-down field will display the name of the saved filter.
  - To close the filter without saving, click the **Run Filter** button. The Filter dialog will close, the filtered results will appear in the display window, and the filter drop-down field will be blank.
  - **To discard your changes:**
    1. Click the **Close** button. A confirmation dialog will appear.
    2. Click the **Yes** button to close the confirmation dialog and the Filter dialog.

## Editing filters

Most of the display areas in the UDS-PROi® software can be filtered. You can use the software's filtering features to edit a filter you created previously.

### To edit a filter:

1. Click the **Filter** button. The Filter dialog will appear.
2. Select the name of the filter you want to edit from the **Filter Name** drop-down field. The fields in the Available Fields display window will become active, and the conditions defined for the filter will appear in the display window to the right of the Filter dialog.
3. Make any necessary changes to the filter.
  - **To add a field to the filter:**
    1. Click a field in the Available Fields display window.
    2. Select a logical operator from the drop-down field between the display windows.
    3. Enter one or more values in the fields below the drop-down field.
      - If you selected the IS NULL or IS NOT NULL operator in step 2, you will be unable to enter any values.
      - If you selected a field that has set values associated with it, such as Primary Pay Source, a selection button (...) will appear next to the field. Click the selection button, select the radio button that corresponds to your choice in the Lookup dialog that appears, and then click the **Select** button to close the Lookup dialog.
  - 4. Click the > button. The selected field and condition will appear in the display window on the right side of the Filter dialog.
    - **To overwrite a field filter:**
      1. Filter on the field a second time.
      2. Enter a new value for the filtered field.
      3. Click the > button. A confirmation dialog will appear.
      4. Click the **Yes** button to close the confirmation dialog and overwrite the field filter.
    - **To create an OR filter for a field:**
      1. Filter on the field a second time.
      2. Enter an additional value for the filtered field.
      3. Click the > button. A confirmation dialog will appear.
      4. Click the **No** button to close the confirmation dialog and add the condition to the field filter.
- **To delete a field from the filter:**
  1. Click the field you want to delete.

2. Click the > button. The selected field and condition will be removed from the display window.
4. Repeat step 3 until you have defined the filter.
5. Close the filter.
  - **To close and save the filter with the same name:**
    1. Click the **Save Filter** button. An information dialog will appear.
    2. Click the **Yes** button to close the information dialog and the Filter dialog. The filtered results will appear in the display window, and the filter drop-down field will display the name of the saved filter.
  - **To close and save the filter with a new name:**
    1. Click the **Save Filter** button. An information dialog will appear.
    2. Click the **No** button to close the information dialog. The Filter Name dialog will appear.
    3. Enter a name for the filter in the **Filter Name** field.
    4. Click the **OK** button to close the Filter Name dialog and the Filter dialog. The filtered results will appear in the display window, and the filter drop-down field will display the name of the saved filter.
  - **To close the filter without saving:**
    1. Click the **Run Filter** button. An information dialog will appear.
    2. Click the **No** button. The Filter dialog will close, the filtered results will appear in the display window, and the filter drop-down field will be blank.
  - **To discard your changes:**
    1. Click the **Close** button. A confirmation dialog will appear.
    2. Click the **Yes** button to close the confirmation dialog and the Filter dialog.

## Selecting filters

Most of the display areas in the UDS-PROi® software can be filtered. You can select a filter to limit the information on display.

To select a saved filter, select it from the drop-down field. The filtered results will appear in the display window, and the drop-down field will display the name of the selected filter.

To display all unfiltered results, select **ALL** (or the equivalent) from the drop-down field. The unfiltered results will appear in the display window, and the drop-down field will display the name of the unfiltered selection.

## Setting a default filter

Most of the display areas in the UDS-PROi® software contain a filter area. You can select a default filter for each such area. The default filter will be applied immediately each time you open the listing. Although filters are valid for all users at a facility, a selected filter is valid as the default filter only for the user who chooses it.

### To set a default filter:

1. Click the **Filter** button. The Filter dialog will appear.
2. Select a filter from the **Filter Name** drop-down field.
3. Select the **Default Filter** checkbox.
4. Click the **Save Filter** button. An information dialog will appear.
5. Click the **Yes** button to save your changes, close the information dialog, and close the Filter dialog. The filtered results will appear in the display window, and the drop-down field will display the name of the new default filter.

## Deleting filters

Most of the display areas in the UDS-PROi® software can be filtered. You can delete a filter you previously created.

Deleting a filter removes the filter for all users at your facility. If you delete the active filter, the filter drop-down field will default to **ALL** (or the equivalent). Note that you can delete only user-defined filters; you cannot delete the default filters that come installed with the UDS-PROi® software.

### To delete a saved filter:

1. Click the **Filter** button. The Filter dialog will appear.
2. Select a filter from the **Filter Name** drop-down field.
3. Click the **Delete Filter** button. A confirmation dialog will appear.
4. Click the **Yes** button to close the dialog. An information dialog will appear.
5. Click the **OK** button to close the information dialog.
6. Click the **Close** button to close the Filter dialog.

## **Managing Preadmission Records**

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### **About preadmission records**

You can use the UDS-PROi<sup>®</sup> software to build a preadmission listing database, which puts all of your preadmission patient information at your fingertips for easy access and editing. This information includes the patient's admission date, demographics, and FIM<sup>®</sup> ratings, as well as notes provided by caregivers. Once you admit a patient to your facility, the patient's preadmission data will transfer to a new case record.



## Viewing the preadmission listing

The Pre-admission Listing window contains a list of all preadmission records for your facility.

### To view the preadmission listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
  - Records of patients who have been admitted to your facility will be highlighted in green.
  - Records of patients who have been denied admission to your facility will be highlighted in tan.
  - Records of patients who have not yet been admitted to your facility or denied admission to your facility will be highlighted in white.

## Customizing the preadmission listing

The Pre-admission Listing window contains a list of all preadmission records for your facility. By default, this window displays a limited number of fields for each record. You can customize the listing by selecting and arranging the fields on display. The new settings will be active for you each time you log in to the UDSPRO Central™ website.

### To customize the preadmission listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click the **Customize Layout** button. The Customize Layout dialog will appear.
6. Select a facility code from the **Facility** drop-down field.
7. Customize the list of fields on display.
  - **To add a field to view:**
    1. Click once on a field in the All Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
    2. Click the **Add** button. The selected field will appear in the Selected Fields display window.
  - **To move a field's position:**
    1. Click once on the field you want to move in the Selected Fields display window.
    2. Use the **Move Up** and **Move Down** buttons to move the field in relation to the other fields in the Selected Fields display window.
  - **To remove a field from view:**
    1. Click once on a field in the Selected Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
    2. Click the **Remove** button. The selected field will disappear from the Selected Fields display window.
8. Click the **Sort Options** button. The Sort Options dialog will appear.
9. Select a primary sorting field from the **Sort Items By** drop-down field.
10. Select a sorting option for the primary sorting field.
  - To sort the list in ascending order, select the **Asc** radio button.
  - To sort the list in descending order, select the **Desc** radio button.
11. Select up to two additional sorting fields from the **Then By** drop-down fields.

12. Select a sorting option for each field you selected in step 11.
13. Click the **Save** button to save your changes. An information dialog will appear.
14. Click the **OK** button to close the information dialog.
15. Click the **Close** button to close the Sort Options dialog.
16. Click the **Close** button to close the Customize Layout dialog.
17. Click the **Close** button to close the Pre-admission Listing window.


## Viewing preadmission records

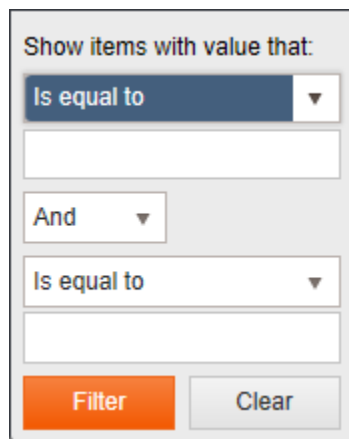
The Pre-admission Listing window contains a list of all preadmission records for your facility. You can use the features of this window to view records in more detail.

### To view preadmission records:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click the link in the **First Name** column that corresponds to the record you want to view. The Pre-admission Information window will appear.

- **To search a particular column:**

1. Click the blue filter icon  to the right of the name of the column whose data you want to search. A filter dialog will appear.




The image shows a filter dialog box with the following elements:

- Header: "Show items with value that:"
- Operator dropdown: "Is equal to" (with a downward arrow)
- Input field: An empty text box for entering a value.
- Logic dropdown: "And" (with a downward arrow)
- Operator dropdown: "Is equal to" (with a downward arrow)
- Input field: An empty text box for entering a second value.
- Buttons: "Filter" (orange) and "Clear" (grey).

2. Use the fields in this dialog to configure the criteria the software will use to find matching records.
3. Click the **Filter** button.

- **To clear the search results for a filtered column:**

1. Click the white filter icon  that appears to the right of the column whose data you filtered on. A filter dialog will appear.
2. Click the **Clear** button.
6. Use the available tabs to navigate the preadmission record.
7. When you are finished viewing the preadmission record, click the **Close** button to close the Pre-admission Patient Information window.
8. Click the **Close** button to close the Pre-admission Listing window.

## Creating preadmission records

You must conduct a preadmission screening evaluation of each Medicare patient admitted to your IRF. The screening must evaluate the patient's condition and need for inpatient rehabilitation therapy and medical treatment. Licensed or certified clinicians must conduct this assessment within the forty-eight-hour window immediately prior to the patient's rehabilitation admission and must file it in the medical record. The rehabilitation physician is responsible for documenting his concurrence with the findings of the preadmission screen before the patient's admission to rehabilitation.

A preadmission assessment/consultation helps determine whether a patient's admission is reasonable and necessary and whether the potential exists for the patient to benefit from an intensive, coordinated inpatient rehabilitation program. Documentation must support CMS's nine preadmission criteria:

1. Prior level of function
2. Expected level of improvement
3. Expected length of time necessary to achieve that level of improvement
4. Evaluation of the patient's risk for clinical complications
5. Conditions that caused the need for rehabilitation
6. Treatments needed
7. Expected frequency and duration of the treatment in the IRF
8. Anticipated discharge destination
9. Anticipated postdischarge treatments

You can enter preadmission assessment information directly into the UDS-PROi<sup>®</sup> software. Once you have entered the information, you can edit or delete it as needed.

Deleting a preadmission assessment will have no effect on subsequent admission, interim, discharge, or follow-up assessments for that record.

### To create a preadmission record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click the **Add** button. The Pre-admission Patient Information window will appear. It will be open to the Patient Info tab.
6. Enter the patient's information in the four available sections: Patient Information, Coverage Information, Physician/Referral Information, and Contact Information.

- **To insert a demographic profile into the preadmission record:**

1. Click the **Demographics** button in the Patient Information area. The Demographics Insert dialog will appear. If you entered any information in the Patient Identification

- Number field, the software will display demographic information from any existing preadmission record with the same Patient Identification Number field and partial matches at the beginning of the Social Security Number and Patient Medical Number fields. If you did not enter any information in the Patient Identification Number field, the software will display only imported demographic profiles and demographic information from existing preadmission records whose Social Security Number and Patient Medicare Number fields match the beginning characters of those fields in the open preadmission record.
2. Select the radio button in the **Select** column that corresponds to the demographic profile you want to import.
  3. Click the **Insert/Update Information** button. The Demographics Insert dialog will close, and the information contained in the selected profile will be populated to the open preadmission record, overwriting the existing information as necessary.
7. Click the **Prior Living/Functional Status** tab.
  8. Enter the patient's information in the two available sections: Prior Living Situation and Prior Level of Function.
  9. Click the **Diagnosis** tab.
  10. Enter the patient's diagnosis information in the three available sections: Rehabilitation Diagnosis, Special Rehabilitation Needs, and Precautions.
- For information about selecting etiologic diagnosis codes from a list of suggested codes, see page 166. For information about selecting and validating comorbid conditions, see page 170.
11. Click the **Medical Info** tab.
  12. Enter the patient's medical information in the three available sections: Past Medical, Social, Family History; Vitals; and Meds/Labs/Diagnostics.
  13. Click the **FIM<sup>®</sup> Status** tab.
  14. Select the assessment you want to perform.
    - To perform a full FIM<sup>®</sup> assessment, clear the **FIM<sup>®</sup> Screen** checkbox in the FIM<sup>®</sup> Instrument section. (If this checkbox is already selected, a confirmation dialog will appear. Click the **Yes** button to confirm your selection and close the confirmation dialog. The software will then delete the FIM<sup>®</sup> information in the record.)
    - **To perform a FIM<sup>®</sup> screen:**
      1. Select the **FIM<sup>®</sup> Screen** checkbox in the FIM<sup>®</sup> Instrument section. A confirmation dialog will appear.
      2. Click the **Yes** button to confirm your selection and close the confirmation dialog. The FIM<sup>®</sup> screen uses nine items—Eating; Grooming; Toileting; Bowel Management; Transfers: Bed, Chair, Wheelchair; Transfers: Toilet; Locomotion: Walk, Wheelchair; Expression; and Memory—to generate a projected CMG, an expected LOS, and a projected FPP for a preadmission record.

15. Enter the patient's FIM<sup>®</sup> ratings, function modifier ratings, and modes in the available fields in the FIM<sup>®</sup> Instrument section.
  - If the FIM<sup>®</sup> Screen checkbox is selected, the software will use the Mini-FIM<sup>™</sup> items (marked with a dagger) to calculate a total motor score, motor score index, total cognition score, and total FIM<sup>®</sup> score. It also will use the AlphaFIM<sup>®</sup> items (marked with an asterisk) to project a thirteen-item FIM<sup>®</sup> rating, a five-item FIM<sup>®</sup> cognitive rating, and the amount of help the patient will need to complete activities of daily living.
  - If the FIM<sup>®</sup> Screen checkbox is not selected, the software will use the FIM<sup>®</sup> ratings to calculate a total motor score, motor score index, total cognition score, and total FIM<sup>®</sup> score.
16. Enter information about the patient's functional status in the fields in the Current Functional Status section.
17. Click the **Goals and Plan** tab.
18. Use the fields in this tab to record information about the patient's goals, rehabilitation plan, therapy requirements, estimated length of stay, estimated admission date, etc.
19. Click the **Custom** tab.
20. Complete any custom fields used by your facility. (Custom fields are defined at the facility level by facility administrators.)
21. Click the **Notes** tab.
22. Enter notes in the fields provided.
  - **To add a note:**
    1. Click the **Add** button. The Pre-admission Notes dialog will appear.
    2. Enter the note's date in the **Entry Date** field.
    3. Enter the note's author in the **Author** field.
    4. Enter the note in the **Notes** field.
 

Because of the way each note is stored, a note may not contain any special characters. These characters include commas and apostrophes.
    5. Click the **Save** button. An information dialog will appear.
    6. Click the **OK** button to close the information dialog.
    7. Click the **Close** button to close the Pre-admission Notes dialog.
  - **To modify a note:**
    1. Click the link in the **Entry Date** column that corresponds to the note you want to edit. The Pre-admission Notes dialog will appear.
    2. Make any necessary changes to the note record.
    3. Click the **Save** button. An information dialog will appear.
    4. Click the **OK** button to close the information dialog.

5. Click the **Close** button to close the Pre-admission Notes dialog.
- **To delete a note:**
  1. Select the radio button in the **Select** column that corresponds to the note you want to delete.
  2. Click the **Delete** button. A confirmation dialog will appear.
  3. Click the **Yes** button to close the confirmation dialog and delete the note. An information dialog will appear.
  4. Click the **OK** button to close the information dialog.
23. Click the **Save** button. After the record has been saved, an information dialog will appear.
24. Click the **OK** button to close the information dialog.
25. Click the **Close** button to close the Pre-admission Patient Information window.
26. Click the **Close** button to close the Pre-admission Listing window.



## Editing preadmission records

The Pre-admission Listing window contains a list of all preadmission records for your facility. You can use the UDS-PROi® software to edit preadmission records for patients at your facility.

### To edit a preadmission record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click the link in the **First Name** column that corresponds to the record you want to edit. The Pre-admission Patient Information window will appear. It will be open to the Patient Info tab.
6. Make any necessary changes to the patient information fields in the four available sections: Patient Information, Coverage Information, Physician/Referral Information, and Contact Information.

- **To insert a demographic profile into the preadmission record:**

1. Click the **Demographics** button in the Patient Information area. The Demographics Insert dialog will appear. If you entered any information in the Patient Identification Number field, the software will display demographic information from any existing preadmission record with the same Patient Identification Number field and partial matches at the beginning of the Social Security Number and Patient Medical Number fields. If you did not enter any information in the Patient Identification Number field, the software will display only imported demographic profiles and demographic information from existing preadmission records whose Social Security Number and Patient Medicare Number fields match the beginning characters of those fields in the open preadmission record.
2. Select the radio button in the **Select** column that corresponds to the demographic profile you want to import.
3. Click the **Insert/Update Information** button. The Demographics Insert dialog will close, and the information contained in the selected profile will be populated to the open preadmission record, overwriting the existing information as necessary.
7. Click the **Prior Living/Functional Status** tab.
8. Make any necessary changes to the fields in the two available sections: Prior Living Situation and Prior Level of Function.
9. Click the **Diagnosis** tab.
10. Make any necessary changes to the diagnosis fields in the three available sections: Rehabilitation Diagnosis, Special Rehabilitation Needs, and Precautions.
 

For information about selecting etiologic diagnosis codes from a list of suggested codes, see page 166. For information about selecting and validating comorbid conditions, see page 170.
11. Click the **Medical Info** tab.

12. Make any necessary changes to the medical information fields in the three available sections: Past Medical, Social, Family History; Vitals; and Meds/Labs/Diagnostics.
13. Click the **FIM® Status** tab.
14. Select the assessment you want to perform.
  - To perform a full FIM® assessment, clear the **FIM® Screen** checkbox in the FIM® Instrument section. (If this checkbox is already selected, a confirmation dialog will appear. Click the **Yes** button to confirm your selection and close the confirmation dialog. The software will then delete the FIM® information in the record.)
  - **To perform a FIM® screen:**
    1. Select the **FIM® Screen** checkbox in the FIM® Instrument section. A confirmation dialog will appear.
    2. Click the **Yes** button to confirm your selection and close the confirmation dialog. The FIM® screen uses nine items—Eating; Grooming; Toileting; Bowel Management; Transfers: Bed, Chair, Wheelchair; Transfers: Toilet; Locomotion: Walk, Wheelchair; Expression; and Memory—to generate a projected CMG, an expected LOS, and a projected FPP for a preadmission record.
15. Make any necessary changes to the FIM® ratings, function modifier ratings, and modes in the fields in the FIM® Instrument section.
  - If the FIM® Screen checkbox is selected, the software will use the Mini-FIM™ items (marked with a dagger) to calculate a total motor score, motor score index, total cognition score, and total FIM® score. It also will use the AlphaFIM® items (marked with an asterisk) to project a thirteen-item FIM® rating, a five-item FIM® cognitive rating, and the amount of help the patient will need to complete activities of daily living.
  - If the FIM® Screen checkbox is not selected, the software will use the FIM® ratings to calculate a total motor score, motor score index, total cognition score, and total FIM® score.
16. Make any necessary changes to the functional status fields in the Current Functional Status section.
17. Click the **Goals and Plan** tab.
18. Make any necessary changes to the patient’s goals, rehabilitation plan, therapy requirements, estimated length of stay, estimated admission date, etc.
19. Click the **Custom** tab.
20. Make any necessary changes to any custom fields used by your facility. (Custom fields are defined at the facility level by facility administrators.)
21. Click the **Notes** tab.
22. Make any necessary changes to the notes in the record.
  - **To add a note:**
    1. Click the **Add** button. The Pre-admission Notes dialog will appear.

2. Enter the note's date in the **Entry Date** field.
3. Enter the note's author in the **Author** field.
4. Enter the note in the **Notes** field.

Because of the way each note is stored, a note may not contain any special characters. These characters include commas and apostrophes.

5. Click the **Save** button. An information dialog will appear.
6. Click the **OK** button to close the information dialog.
7. Click the **Close** button to close the Pre-admission Notes dialog.

- **To modify a note:**

1. Click the link in the **Entry Date** column that corresponds to the note you want to edit. The Pre-admission Notes dialog will appear.
2. Make any necessary changes to the note record.
3. Click the **Save** button. An information dialog will appear.
4. Click the **OK** button to close the information dialog.
5. Click the **Close** button to close the Pre-admission Notes dialog.

- **To delete a note:**

1. Select the radio button in the **Select** column that corresponds to the note you want to delete.
2. Click the **Delete** button. A confirmation dialog will appear.
3. Click the **Yes** button to close the confirmation dialog and delete the note. An information dialog will appear.
4. Click the **OK** button to close the information dialog.

23. Click the **Save** button. After the record has been saved, an information dialog will appear.
24. Click the **OK** button to close the information dialog.
25. Click the **Close** button to close the Pre-admission Patient Information window.
26. Click the **Close** button to close the Pre-admission Listing window.

## Deleting preadmission records

The Pre-admission Listing window contains a list of all preadmission records for your facility. You can use the UDS-PROi<sup>®</sup> software to delete preadmission records from the UDS-PROi<sup>®</sup> database.

You cannot delete a preadmission record for an admitted patient unless you first delete the case record.

### To delete a preadmission record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to delete.
6. Click the **Delete** button. A confirmation dialog will appear.
7. Click the **Yes** button close the confirmation dialog and delete the record. An information dialog will appear.
8. Click the **OK** button to close the information dialog. The deleted record will disappear from the display window.
9. Click the **Close** button to close the Pre-admission Listing window.

## Generating the pre-admit document

You can use the UDS-PROi<sup>®</sup> software to view and print the pre-admit document, which presents a formatted version of a patient's preadmission information.

### To generate the pre-admit document from the preadmission listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to report on. (To report on multiple records, select the checkbox in the **Select** column for each record you want to include in the report.)
6. Click the **Pre-admit Document** button. The Pre-admit Document dialog will appear.
  - To include custom fields in the pre-admit document, select the **With Custom Fields** checkbox.
  - To include note fields in the pre-admit document, select the **With Notes** checkbox.
7. Click the **Print** button. The pre-admit document will appear in a separate window.

### To generate the pre-admit document from an open preadmission record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click the link in the **First Name** column that corresponds to the record you want to report on. The Pre-admission Patient Information window will appear.
6. Click the **Pre-admit Document** button. The Pre-admit Document dialog will appear.
  - To include custom fields in the pre-admit document, select the **With Custom Fields** checkbox.
  - To include note fields in the pre-admit document, select the **With Notes** checkbox.
7. Click the **Print** button. The pre-admit document will appear in a separate window.

### To print a generated report:

1. Open the **File** menu in Adobe Reader.
2. Click the **Print** button. The Print dialog will appear.
3. Configure your printer options.
4. Click the **Print** button.

**To save a generated report:**

1. Open the **File** menu.
2. Select **Save As**, and then click the **PDF** button. The Save As dialog will appear.
3. Select a folder on your network.
4. Enter a name for the exported report file in the **File name** field.
5. Select an export format from the **Save as type** drop-down field.
6. Click the **Save** button.

**To close a generated report:**

1. Click the **X** in the upper right corner of the Adobe Reader window.
2. Click the **Close** button to close the Pre-admission Listing window. (If you generated the pre-admit document from an open preadmission record, click the **Close** button first to close the Pre-admission Patient Information window, and then click the **Close** button to close the Pre-admission Listing window.)

## Reassessing patients

You must conduct a preadmission screening evaluation of each Medicare patient admitted to your IRF. The screening must evaluate the patient's condition and need for inpatient rehabilitation therapy and medical treatment. Licensed or certified clinicians must conduct this assessment within the forty-eight-hour window immediately prior to the patient's rehabilitation admission and must file it in the medical record. If more than forty-eight hours have passed since the preadmission assessment, a licensed or certified clinician must reassess the patient.

### To reassess a patient:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click the link in the **First Name** column that corresponds to the record of the patient you want to reassess. The Pre-admission Patient Information window will appear. It will be open to the Patient Info tab.
6. Click the **Reassess** tab.
7. Select the reassessment date from the **Reassessment Date** calendar field, or enter it manually.
8. Enter the time of the assessment in the **Reassessment Time** field.
9. Record the changes to the patient's medical status in the **Medical Status Changes** field.
10. Record the changes to the patient's functional status in the **Functional Status Changes** field.
11. Record the physician's updated review and admission determination in the **Physician's Updated Review and Admission Determination** field.
12. Use the other tabs and fields if you want to make additional changes. For more information, see page 75.
13. Click the **Save** button. After the record has been saved, an information dialog will appear.
14. Click the **OK** button to close the information dialog.
15. Click the **Close** button to close the Pre-admission Patient Information window.
16. Click the **Close** button to close the Pre-admission Listing window.

## Signing preadmission records

CMS requires that a preadmission screener and a rehabilitation physician sign, date, and time the preadmission screen prior to the patient's admission to rehabilitation. The UDS-PROi<sup>®</sup> software allows IRFs to meet this requirement by requiring the username and password of the account that will be used to sign the record. The software assigns the date and time automatically when the record is signed.

A user does not have to be logged in to the UDS-PROi<sup>®</sup> software to sign a preadmission record. The software will prompt the logged-in user for the username and password of the user who will sign the record, even if the logged-in user has the required signing privileges. The user who is signing the record should enter the user account information. For security reasons, users should not share their passwords with **anyone**.

### To sign a preadmission record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central<sup>™</sup> page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click the link in the **First Name** column that corresponds to the record you want to edit. The Pre-admission Patient Information window will appear. It will be open to the Patient Info tab.
6. Click the **Sign** button. The Pre-admission Signature dialog will appear.
7. Enter the username and password of the signee's account in the **Username** and **Password** fields, respectively.
8. If the user account signing the preadmission record has rights to sign off on the preadmission screen as a physician, the Physician's Review and Admission Determination field will become active. If this happens, the physician should document his review of, and his agreement with, the results of the preadmission screen in the **Physician's Review and Admission Determination** field. The software will transfer the text in this field to field 154 on the Goals and Plan tab.
9. Enter any comments in the **Comments** field.
10. Click the **Save** button to close the Pre-admission Signature dialog.
11. Click the **Save** button. After the record has been saved, an information dialog will appear.
12. Click the **OK** button to close the information dialog.
13. Click the **Close** button to close the Pre-admission Patient Information window.
14. Click the **Close** button to close the Pre-admission Listing window.



## Admitting patients

Once you have admitted a patient to your facility, you can transfer the patient's preadmission record data to a new case record. The UDS-PROi<sup>®</sup> software automatically creates a case record when you admit the patient from the preadmission listing, saving you the need to manually enter the patient data into your case listing. You also can use the software to track the reasons patients were refused admission to your IRF, even adding your own custom fields for admission denials and discharge destinations.

Once you have admitted a patient, you will be unable to delete the patient's preadmission record without first deleting the patient's case record.

### To admit a patient from the preadmission listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to admit.
6. Click the **Admit** button. The Admit Patient dialog will appear.
  - If the physician has not yet signed off on the preadmission record, a dialog will appear, asking whether you want to continue with the process of admitting this patient. To continue, click the **Yes** button. (To cancel, click the **No** button.)
  - If a preadmission screener has not yet signed off on the preadmission record, a dialog will appear, asking whether you want to continue with the process of admitting this patient. To continue, click the **Yes** button. (To cancel, click the **No** button.)
  - If the patient's preadmission assessment occurred more than forty-eight hours ago, a dialog will appear, asking whether you want to continue with the process of admitting this patient. To continue, click the **Yes** button. (To cancel, click the **No** button.)
7. Select a site from the **Site** drop-down field. (If the Unit drop-down field appears, select a unit as well.)
8. Enter the patient's identification code in the **Patient ID** field.
9. Select the patient's admission date from the **Admission Date** calendar field, or enter it manually.
10. Click the **Admit Patient** button. The information in the admitted preadmission record will be copied to your case listing as an admitted case record, and the software will highlight the row that contains the preadmission record in green in the Pre-admission Listing window.
11. Click the **Close** button to close the Pre-admission Listing window.

### To admit a patient from an open preadmission record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.

3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click once on the link in the **First Name** column that corresponds to the record you want to admit. The Pre-admission Patient Information window will appear.
6. Click the **Admit** button. The Admit Patient dialog will appear.
  - If the physician has not yet signed off on the preadmission record, a dialog will appear, asking whether you want to continue with the process of admitting this patient. To continue, click the **Yes** button. (To cancel, click the **No** button.)
  - If a preadmission screener has not yet signed off on the preadmission record, a dialog will appear, asking whether you want to continue with the process of admitting this patient. To continue, click the **Yes** button. (To cancel, click the **No** button.)
  - If the patient's preadmission assessment occurred more than forty-eight hours ago, a dialog will appear, asking whether you want to continue with the process of admitting this patient. To continue, click the **Yes** button. (To cancel, click the **No** button.)
7. Select a site from the **Site** drop-down field. (If the Unit drop-down field appears, select a unit as well.)
8. Enter the patient's identification code in the **Patient ID** field.
9. Select the patient's admission date from the **Admission Date** calendar field, or enter it manually.
10. Click the **Admit Patient** button. The information in the admitted preadmission record will be copied to your case listing as an admitted case record.
11. Click the **Close** button to close the Pre-admission Patient Information window. The software will highlight the row that contains the preadmission record in green in the Pre-admission Listing window.
12. Click the **Close** button to close the Pre-admission Listing window.

**To deny admission to a patient from the preadmission listing:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to deny admission to.
6. Click the **Do Not Admit** button. The Do Not Admit Patient dialog will appear.
7. Select the reason for the admission denial from the **Reason** drop-down field. If you select **09 – Other**, record the reason in the **Reason – Other** field.
8. Select the patient's discharge destination from the **Discharge Destination** drop-down field. (This field is optional.) If you select **11 – Other**, record the discharge destination in the

**Discharge Destination – Other** field. This field is **not** optional if you selected 11 – Other from the Discharge Destination drop-down field.

9. Select the patient’s impairment group code from the **Impairment Group** drop-down field. By default, this field will match the information in the patient’s preadmission record. If you change the field, the corresponding information in the patient’s preadmission record will change to match your selection.
10. Click the **Save** button to close the Do Not Admit Patient dialog. The software will highlight the row that contains the preadmission record in tan in the Pre-admission Listing window.
11. Click the **Close** button to close the Pre-admission Listing window.

**To deny admission to a patient from an open preadmission record:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click once on the link in the **First Name** column that corresponds to the record you want to deny admission to. The Pre-admission Patient Information window will appear.
6. Click the **Do Not Admit** button. The Do Not Admit Patient dialog will appear.
7. Select the reason for the admission denial from the **Reason** drop-down field. If you select **09 – Other**, enter a description of the reason in the **Reason – Other** field.
8. Select the patient’s discharge destination from the **Discharge Destination** drop-down field. (This field is optional.) If you select **11 – Other**, enter a description of the discharge destination in the **Discharge Destination – Other** field. This field is **not** optional if you have selected 11 – Other from the Discharge Destination drop-down field.
9. Select the patient’s impairment group code from the **Impairment Group** drop-down field. By default, this field will match the information in the patient’s preadmission record. If you change the field, the corresponding information in the patient’s preadmission record will change to match your selection.
10. Click the **Save** button to close the Do Not Admit Patient dialog.
11. Click the **Close** button to close the Pre-admission Patient Information window. The software will highlight the row that contains the preadmission record in tan in the Pre-admission Listing window.
12. Click the **Close** button to close the Pre-admission Listing window.

**To customize the list of admission denial reasons:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page. (Because admission denial codes are facility-specific, you must repeat these steps if you want to add the same admission denial code for multiple facilities.)
2. Click the **Data Management** button.
3. Click the **Forms** button.

4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Select the checkbox in the **Select** column of any nonadmitted patient.
6. Click the **Do Not Admit** button. The Do Not Admit dialog will appear.
7. Click the **List** button to the right of the Reason drop-down field. The Reason for Non-admit dialog will appear.
8. Make any necessary changes to the list of codes.

- **To add an admission denial code:**

1. Enter a two-digit code in the **List Item Code** field. (The default list is nine codes long, so you must use a code higher than nine.)
2. Enter a description for the code in the **List Item** field.
3. Click the **Save** button. An information dialog will appear.
4. Click the **OK** button to close the information dialog.

- **To delete an admission denial code:**

1. Select the radio button in the **Select** column to the left of the code you want to delete.
2. Click the **Delete Item** button. A confirmation dialog will appear.
3. Click the **Yes** button to confirm your selection and close the confirmation dialog. After the software deletes the code, an information dialog will appear.
4. Click the **OK** button to close the information dialog.

You cannot delete an admission denial code that is currently being used by any preadmission record.

9. Click the **Close** button to close the Reason for Non-admit dialog.
10. Click the **Cancel** button to close the Do Not Admit Patient dialog.
11. Click the **Close** button to close the Pre-admission Listing window.

**To customize the list of discharge destinations:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page. (Because discharge destination codes are facility-specific, you must repeat these steps if you want to add the same discharge destination code for multiple facilities.)
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Select the checkbox in the **Select** column of any nonadmitted patient.
6. Click the **Do Not Admit** button. The Do Not Admit dialog will appear.
7. Click the **List** button to the right of the Discharge Destination drop-down field. The Discharge Destination dialog will appear.

8. Make any necessary changes to the list of codes.

- **To add a discharge destination code:**

1. Enter a two-digit code in the **List Item Code** field. (The default list is eleven codes long, so you must use a code higher than eleven.)
2. Enter a description for the code in the **List Item** field.
3. Click the **Save** button. An information dialog will appear.
4. Click the **OK** button to close the information dialog.

- **To delete a discharge destination code:**

1. Select the radio button in the **Select** column to the left of the code you want to delete.
2. Click the **Delete Item** button. A confirmation dialog will appear.
3. Click the **Yes** button to confirm your selection and close the confirmation dialog. After the software deletes the code, an information dialog will appear.
4. Click the **OK** button to close the information dialog.

You cannot delete a discharge destination code that is currently being used by any preadmission record.

9. Click the **Close** button to close the Discharge Destination dialog.

10. Click the **Cancel** button to close the Do Not Admit Patient dialog.

11. Click the **Close** button to close the Pre-admission Listing window.

**To clear a previously denied patient for admission:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to clear for admission.
6. Click the **Do Not Admit** button. The Do Not Admit Patient dialog will appear.
7. Click the **Clear** button. A confirmation dialog will appear.
8. Click the **Yes** button to confirm your selection and close the confirmation dialog. The software will highlight the row that contains the preadmission record in white in the Pre-admission Listing window.
9. Click the **Close** button to close the Pre-admission Listing window.

## Sending email notifications

The UDS-PROi<sup>®</sup> software allows a user with read and write access to the preadmission listing to send an email request to another user who needs to complete a particular action in the preadmission listing, such as reassessing a patient or signing off on a patient's admission to the facility. The notification, which contains a subject, a body, and a selected priority, contains links the recipient can use to access the UDS-PROi<sup>®</sup> software or the UDS-PRO<sup>®</sup> Portal. When the recipient logs in to the system and accesses the preadmission listing, the software will display a new "My To Do List" filter. Once the task is completed, the recipient can mark the task complete, which will send a confirmation email to the user who made the request.

**Warning!** This feature is not a closed system, and the email it sends is not secure. **In accordance with HIPAA, we recommend that you do not enter any PHI into the subject or body of any e-mail notification.** If you have questions, consult your facility's policies and procedures.

### To send an email notification to a user:

1. Click the **Data Management** button in the navigation menu.
2. Click the **Forms** button.
3. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
4. Select the checkbox in the **Select** column that corresponds to the record you want to send an email notification about and then click the **E-mail** button, or click the link in the **First Name** column for the record and then click the **E-mail** button after the software opens the preadmission record. (If you use the checkboxes, you can select multiple records at once, in which case the software will send one email for each record.) In either case, the Send E-mail dialog will appear.
5. Select a recipient from the list of real names and email addresses in the **To** drop-down field. The list is sorted alphabetically by email address. (If a user account does not have a real name associated with it, the software will display *[Blank]* for the user's real name.)
6. Select a template from the **Template** drop-down field.
  - **To create a new template:**
    1. Click the **List** button to the right of the Template drop-down field. The Edit Subject/Body Templates dialog will appear.
    2. Enter text into the **Subject** and **Body** fields.
    3. Click the **Save** button. An information dialog will appear.
    4. Click the **OK** button to close the information dialog.
    5. Click the **Close** button to close the Edit Subject/Body Templates dialog. If you want to use the template for this message, select it from the **Template** drop-down field.
  - **To base a new template on an existing template:**
    1. Click the **List** button to the right of the Template drop-down field. The Edit Subject/Body Templates dialog will appear.

2. Select a template from the **Template** drop-down field. The dialog will display the subject and body of the selected template. The Subject field will be gray (inactive).
  3. Select the blank line from the **Template** drop-down field. The Subject field will become white (active).
  4. Change the text in the **Subject** field.
  5. Make any necessary changes to the text in the **Body** field.
  6. Click the **Save** button. An information dialog will appear.
  7. Click the **OK** button to close the information dialog.
  8. Click the **Close** button to close the Edit Subject/Body Templates dialog. If you want to use the template for this message, select it from the **Template** drop-down field.
- **To edit an existing template:**
    1. Click the **List** button to the right of the Template drop-down field. The Edit Subject/Body Templates dialog will appear.
    2. Select a template from the **Template** drop-down field.
    3. Make any necessary changes to the text in the **Body** field.
    4. Click the **Save** button. An information dialog will appear.
    5. Click the **OK** button to close the information dialog.
    6. Click the **Close** button to close the Edit Subject/Body Templates dialog. If you want to use the template for this message, select it from the **Template** drop-down field.
  - **To delete a template:**
    1. Click the **List** button to the right of the Template drop-down field. The Edit Subject/Body Templates dialog will appear.
    2. Select a template from the **Template** drop-down field.
    3. Click the **Delete** button. A confirmation dialog will appear.
    4. Click the **OK** button to confirm your selection and delete the template. An information dialog will appear.
    5. Click the **OK** button to close the information dialog.
    6. Click the **Close** button to close the Edit Subject/Body Templates dialog.
7. Select a priority for the email (**High**, **Normal**, or **Low**) from the **Priority** drop-down field.
  8. Make any necessary changes to the text in the **Body** field.
  9. Click the **Send** button to send the email and close the Send E-mail dialog.

**If you receive an email notification from the system:**

1. Log in to the system. (You can use the links in the email you received.)
2. Click the **Data Management** button in the navigation menu.
3. Click the **Forms** button.

4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear, the My To Do List filter will be selected from the filter field, and the software will display a list of your pending requests. The following information will appear in the list for each record:
  - A Select checkbox
  - The Patient ID field
  - The patient's last name
  - The patient's first name
  - The patient's assessment date
  - The patient's projected admission date
  - The number of emails you have received regarding the record
  - The highest priority associated with the emails you have received
  - The date and time of the most recent email (if the priority of each email is the same) or the highest-priority email

To sort the requests in ascending order by column, click any column header other than the Select header. To sort the requests in descending order, click the column header again.

5. If you want to see a list of requests, click the link in the **# of E-mails** column. The Pre-admission Notification dialog will appear.
  - To print the contents of the emails, click the **Print** button, configure your printer options, and click the **Print** button. (If you logged in to the UDS-PRO<sup>®</sup> Portal, this option is not currently available.)
  - To save the contents of the emails to a rich-text format (RTF) file, click the **Save to File** button, click the **Download** button in the Download dialog, and then save the file to your network.
  - To close the Pre-admission Notification dialog, click the **Close** button or the **X** in the upper right corner of the dialog.
6. Click the link in the **First Name** column for the record you want to edit.
7. Complete the task (reassess the patient, sign the record, etc.).
8. Close the record. You will return to the Pre-admission Listing window, and the My To Do List filter will be selected from the filter list.
9. Select the checkbox in the **Select** column for the record you edited.
10. Click the **Task Complete** button. If you do not have any pending tasks for any preadmission records, the software will display your default preadmission listing view the next time you open the Pre-admission Listing window.



## **Managing Case Records**

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### **About case records**

You can use the UDS-PROi<sup>®</sup> software to build a case listing database, which puts all of your postadmission patient information at your fingertips for easy access and editing. This information includes the patient's admission date, demographics, and FIM<sup>®</sup> ratings, as well as notes provided by caregivers.

## Viewing the case listing

The Case Listing window contains a list of all case records for your facility.

### To view the case listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.

## Customizing the case listing

The Case Listing window contains a list of all case records for your facility. By default, this window displays a limited number of fields for each record. You can customize the listing by selecting and arranging the fields on display. The new settings will be active for you each time you log in to the UDSPRO Central™ website.

### To customize the case listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the **Customize Layout** button. The Customize Layout dialog will appear.
6. Select a facility code from the **Facility** drop-down field.
7. Customize the list of fields on display.
  - **To add a field to view:**
    1. Click once on a field in the All Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
    2. Click the **Add** button. The selected field will appear in the Selected Fields display window.
  - **To move a field's position:**
    1. Click once on the field you want to move in the Selected Fields display window.
    2. Use the **Move Up** and **Move Down** buttons to move the field in relation to the other fields in the Selected Fields display window.
  - **To remove a field from view:**
    1. Click once on a field in the Selected Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
    2. Click the **Remove** button. The selected field will disappear from the Selected Fields display window.
8. Click the **Sort Options** button. The Sort Options dialog will appear.
9. Select a primary sorting field from the **Sort Items By** drop-down field.
10. Select a sorting option for the primary sorting field.
  - To sort the list in ascending order, select the **Asc** radio button.
  - To sort the list in descending order, select the **Desc** radio button.
11. Select up to two additional sorting fields from the **Then By** drop-down fields.

12. Select a sorting option for each field you selected in step 11.
13. Click the **Save** button to save your changes. An information dialog will appear.
14. Click the **OK** button to close the information dialog.
15. Click the **Close** button to close the Sort Options dialog.
16. Click the **Close** button to close the Customize Layout dialog.
17. Click the **Close** button to close the Case Listing window.


## Viewing case records

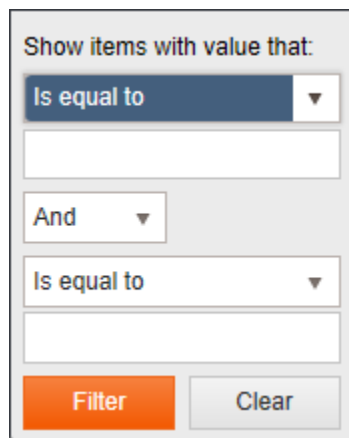
The Case Listing window contains a list of all case records for your facility. You can use the features of this window to view records in more detail.

### To view case records:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to view. The Patient Assessment Information window will appear.


- **To search a particular column:**

1. Click the blue filter icon  to the right of the name of the column whose data you want to search. A filter dialog will appear.



The image shows a filter dialog box with the following elements:

- Title: "Show items with value that:"
- Operator 1: "Is equal to" (dropdown menu)
- Field 1: An empty text input field.
- Operator 2: "And" (dropdown menu)
- Operator 3: "Is equal to" (dropdown menu)
- Field 2: An empty text input field.
- Buttons: "Filter" (orange) and "Clear" (grey).

2. Use the fields in this dialog to configure the criteria the software will use to find matching records.
  3. Click the **Filter** button.
- **To clear the search results for a filtered column:**
    1. Click the white filter icon  that appears to the right of the column whose data you filtered on. A filter dialog will appear.
    2. Click the **Clear** button.
6. Use the available tabs to navigate the case record.
  7. When you are finished viewing the case record, click the **Close** button to close the Patient Assessment Information window.
  8. Click the **Close** button to close the Case Listing window.

## Creating case records

The Case Listing window contains a list of all case records for your facility. You can use the UDS-PROi<sup>®</sup> software to create case records for new patients at your facility.

### To create a new case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the **Add** button. The Patient Assessment Information window will appear. It will be open to the Identification tab.
6. Enter the patient's identification in the fields provided.
  - **To insert a demographic profile into the case record:**
    1. Click the **Demographics** button in the Identification Information area. The Demographics Insert dialog will appear. If you entered any information in the Patient Identification Number field, the software will display demographic information from any existing case record with the same Patient Identification Number field and partial matches at the beginning of the Social Security Number and Patient Medical Number fields. If you did not enter any information in the Patient Identification Number field, the software will display only imported demographic profiles and demographic information from existing case records whose Social Security Number and Patient Medicare Number fields match the beginning characters of those fields in the open case record.
    2. Select the radio button in the **Select** column that corresponds to the demographic profile you want to import.
    3. Click the **Insert/Update Information** button. The Demographics Insert dialog will close, and the information contained in the selected profile will be populated to the open case record, overwriting the existing information as necessary.
7. Click the **Pre-Admit** tab.
8. Enter the patient's preadmission assessment in the fields provided.
  - To perform a Mini-FIM™ assessment, select the **Perform Mini-FIM™ Assessment** checkbox. The Mini-FIM™ assessment tool uses seven items—Eating; Toileting; Bowel Management; Transfers: Bed, Chair, Wheelchair; Locomotion: Walk, Wheelchair; Expression; and Memory—to generate a projected CMG, an expected LOS, and an FPP for a preadmission record.
9. Click the **Admission** tab.

10. Enter the patient's medical information in the fields provided.

For information about selecting etiologic diagnosis codes from a list of suggested codes, see page 168. For information about selecting, validating, and prioritizing comorbid conditions, see page 173.

11. Click the **FIM<sup>®</sup> Instrument** tab.

12. Enter the patient's admission assessment information in the fields provided.

13. Click the **Therapy Info** tab.

14. Enter the minutes of therapy the patient received from each discipline for the first two weeks of the stay in the fields provided. (If the patient did not receive any therapy during the second week of the stay, select the **No Therapy Week 2** checkbox.)

15. Click the **QI Functional** tab.

16. Enter the patient's quality indicator information in the fields provided.

17. Click the **QI Medical** tab.

18. Enter the patient's quality indicator information in the fields provided.

19. Click the **Cost** tab.

20. Complete any cost fields used by your facility. (Cost fields are defined at the facility level by facility administrators.)

21. Click the **Notes** tab.

22. Enter notes in the fields provided.

- **To add a note:**

1. Click the **Add** button. The PAI Notes dialog will appear.
2. Enter the note's date in the **Entry Date** field.
3. Enter the note's author in the **Author** field.
4. Enter the note in the **Notes** field.

Because of the way each note is stored, a note may not contain any special characters. These characters include commas and apostrophes.

5. Click the **Save** button. An information dialog will appear.
6. Click the **OK** button to close the information dialog.
7. Click the **Close** button to close the PAI Notes dialog.

- **To modify a note:**

1. Click the link in the **Entry Date** column that corresponds to the note you want to edit. The PAI Notes dialog will appear.
2. Make any necessary changes to the note record.
3. Click the **Save** button. An information dialog will appear.
4. Click the **OK** button to close the information dialog.

5. Click the **Close** button to close the PAI Notes dialog.
- **To delete a note:**
  1. Select the radio button in the **Select** column that corresponds to the note you want to delete.
  2. Click the **Delete** button. A confirmation dialog will appear.
  3. Click the **Yes** button to close the confirmation dialog and delete the note. An information dialog will appear.
  4. Click the **OK** button to close the information dialog.
23. Click the **Save** button. After the record has been saved, an information dialog will appear.
24. Click the **OK** button to close the information dialog.
25. Click the **Close** button to close the Patient Assessment Information window.
26. Click the **Close** button to close the Case Listing window.



## Editing case records

The Case Listing window contains a list of all case records for your facility. You can use the UDS-PROi<sup>®</sup> software to edit case records for patients at your facility.

### To edit a case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear. It will be open to the Identification tab.
6. Make any necessary changes to the patient's identification information.
  - **To insert a demographic profile into the case record:**
    1. Click the **Demographics** button in the Identification Information area. The Demographics Insert dialog will appear. If you entered any information in the Patient Identification Number field, the software will display demographic information from any existing case record with the same Patient Identification Number field and partial matches at the beginning of the Social Security Number and Patient Medical Number fields; if you did not enter any information in the Patient Identification Number field, the software will display only imported demographic profiles and demographic information from existing case records whose Social Security Number and Patient Medicare Number fields match the beginning characters of those fields in the open case record.
    2. Select the radio button in the **Select** column that corresponds to the demographic profile you want to import.
    3. Click the **Insert/Update Information** button. The Demographics Insert dialog will close, and the information contained in the selected profile will be populated to the open case record, overwriting the existing information as necessary.
7. Click the **Pre-Admit** tab.
8. Make any necessary changes to the patient's preadmission assessment.
  - To perform a Mini-FIM™ assessment, select the **Perform Mini-FIM™ Assessment** checkbox. The Mini-FIM™ assessment tool uses seven items—Eating; Toileting; Bowel Management; Transfers: Bed, Chair, Wheelchair; Locomotion: Walk, Wheelchair; Expression; and Memory—to generate a projected CMG, an expected LOS, and an FPP for a preadmission record.
9. Click the **Admission** tab.

10. Make any necessary changes to the patient's medical information.

For information about selecting etiologic diagnosis codes from a list of suggested codes, see page 168. For information about selecting, validating, and prioritizing comorbid conditions, see page 173.

11. Click the **FIM® Instrument** tab.

12. Make any necessary changes to the patient's admission assessment information.

13. Click the **Therapy Info** tab.

14. Make any necessary changes to the minutes of therapy the patient received from each discipline for the first two weeks of the stay. (If the patient did not receive any therapy during the second week of the stay, select the **No Therapy Week 2** checkbox.)

15. Click the **QI Functional** tab.

16. Make any necessary changes to the patient's quality indicator information.

17. Click the **QI Medical** tab.

18. Enter the patient's quality indicator information in the fields provided.

19. Click the **Cost** tab.

20. Make any necessary changes to any cost fields used by your facility. (Cost fields are defined at the facility level by facility administrators.)

21. Click the **Notes** tab.

22. Make any necessary changes to the notes.

- **To add a note:**

1. Click the **Add** button. The PAI Notes dialog will appear.
2. Enter the note's date in the **Entry Date** field.
3. Enter the note's author in the **Author** field.
4. Enter the note in the **Notes** field.

Because of the way each note is stored, a note may not contain any special characters. These characters include commas and apostrophes.

5. Click the **Save** button. An information dialog will appear.
6. Click the **OK** button to close the information dialog.
7. Click the **Close** button to close the PAI Notes dialog.

- **To modify a note:**

1. Click the link in the **Entry Date** column that corresponds to the note you want to edit. The PAI Notes dialog will appear.
2. Make any necessary changes to the note record.
3. Click the **Save** button. An information dialog will appear.
4. Click the **OK** button to close the information dialog.

5. Click the **Close** button to close the PAI Notes dialog.
- **To delete a note:**
  1. Select the radio button in the **Select** column that corresponds to the note you want to delete.
  2. Click the **Delete** button. A confirmation dialog will appear.
  3. Click the **Yes** button to close the confirmation dialog and delete the note. An information dialog will appear.
  4. Click the **OK** button to close the information dialog.
23. Click the **Save** button. After the record has been saved, an information dialog will appear.
24. Click the **OK** button to close the information dialog.
25. Click the **Close** button to close the Patient Assessment Information window.
26. Click the **Close** button to close the Case Listing window.

## Deleting case records

The Case Listing window contains a list of all case records for your facility. You can use the UDS-PROi® software to delete case records from the UDS-PROi® database.

We recommend that you delete only your test data submission cases. If you delete live cases, be sure to archive your case records.

### To delete a case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to delete.
6. Click the **Delete** button. A confirmation dialog will appear.
7. Click the **Yes** button close the confirmation dialog and delete the record. An information dialog will appear.
8. Click the **OK** button to close the information dialog. The deleted record will disappear from the display window.
9. Click the **Close** button to close the Case Listing window.

## Managing preadmission assessments

Although not required by CMS, preadmission assessments are still useful for your facility. A preadmission assessment establishes a patient's baseline functional status prior to the patient's admission to an IRF. You can enter preadmission assessment information directly into the UDS-PROi<sup>®</sup> software. Once you have entered the information, you can edit or delete it as needed.

Deleting a preadmission assessment will have no effect on subsequent admission, interim, discharge, or follow-up assessments for that record.

### To create a preadmission assessment:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear.
6. Click the **Pre-Admit** tab.
7. Select the patient's assessment date from the **Pre-admission Assessment Date** calendar field, or enter it manually.
8. Select the patient's projected admission date from the **Projected Admit Date** calendar field, or enter it manually.
9. Select the patient's impairment group from the **Impairment Group** drop-down field.
10. Enter the patient's preadmission assessment information in the fields in the Function Modifiers area and the FIM<sup>®</sup> Instrument area.
  - To perform a Mini-FIM™ assessment, select the **Perform Mini-FIM™ Assessment** checkbox. The Mini-FIM™ assessment tool uses seven items—Eating; Toileting; Bowel Management; Transfers: Bed, Chair, Wheelchair; Locomotion: Walk, Wheelchair; Expression; and Memory—to generate a projected CMG, an expected LOS, and an FPP for a preadmission record.
11. Complete any custom fields used by your facility. (Custom fields are defined at the facility level by facility administrators.)
12. Click the **Save** button. After the record has been saved, an information dialog will appear.
13. Click the **OK** button to close the information dialog.
14. Click the **Close** button to close the Patient Assessment Information window.
15. Click the **Close** button to close the Case Listing window.

### To edit a preadmission assessment:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.

3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear.
6. Click the **Pre-Admit** tab.
7. Select the patient's assessment date from the **Pre-admission Assessment Date** calendar field, or enter it manually.
8. Select the patient's projected admission date from the **Projected Admit Date** calendar field, or enter it manually.
9. Select the patient's impairment group from the **Impairment Group** drop-down field.
10. Make any necessary changes to the preadmission assessment information in the fields in the Function Modifiers area and the FIM<sup>®</sup> Instrument area.
  - To perform a Mini-FIM<sup>™</sup> assessment, select the **Perform Mini-FIM<sup>™</sup> Assessment** checkbox. The Mini-FIM<sup>™</sup> assessment tool uses seven items—Eating; Toileting; Bowel Management; Transfers: Bed, Chair, Wheelchair; Locomotion: Walk, Wheelchair; Expression; and Memory—to generate a projected CMG, an expected LOS, and an FPP for a preadmission record.
11. Complete any custom fields used by your facility. (Custom fields are defined at the facility level by facility administrators.)
12. Click the **Save** button. After the record has been saved, an information dialog will appear.
13. Click the **OK** button to close the information dialog.
14. Click the **Close** button to close the Patient Assessment Information window.
15. Click the **Close** button to close the Case Listing window.

**To view a preadmission assessment:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central<sup>™</sup> page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to view.
6. Click the **View Assessments** button. The View Assessments dialog will appear.
7. View the information in the preadmission assessment row. The software will display the following information for each assessment:
  - The reason for the assessment (i.e., the assessment type)
  - ARD (assessment reference date)
  - Impairment group

- Total FIM<sup>®</sup> motor rating
  - Total FIM<sup>®</sup> cognitive rating
  - Total FIM<sup>®</sup> rating
  - CMS Status
  - UDSMR<sup>®</sup> Status
8. When you are finished, click the **Close** button to close the View Assessments dialog.
  9. Click the **Close** button to close the Case Listing window.

**To delete a preadmission assessment:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to edit.
6. Click the **View Assessments** button. The View Assessments dialog will appear.
7. Select the radio button in the **Select** column that corresponds to the preadmission assessment.
8. Click the **Delete Assessment** button. A confirmation dialog will appear.
9. Click the **Yes** button to close the confirmation dialog. An information dialog will appear.
10. Click the **OK** button to close the information dialog.
11. Click the **Close** button to close the View Assessments dialog.
12. Click the **Close** button to close the Case Listing window.

## Managing admission assessments

Required by CMS, the admission assessment establishes a patient's baseline functional status at the time of the patient's admission to an IRF. Once you have created a case record, you can enter admission assessment information directly into the UDS-PROi<sup>®</sup> software. Once you have entered the information, you can edit and view it as needed.

You cannot delete an admission assessment.

### To create an admission assessment:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear.
6. Click the **Admission** tab.
7. Enter the patient's admission information in the fields provided.

For information about selecting etiologic diagnosis codes from a list of suggested codes, see page 168. For information about selecting, validating, and prioritizing comorbid conditions, see page 173.

8. Click the **FIM<sup>®</sup> Instrument** tab.
9. Enter the patient's admission assessment information in the fields in the Function Modifiers area and the FIM<sup>®</sup> Instrument area.
10. Click the **Save** button. After the record has been saved, an information dialog will appear.
11. Click the **OK** button to close the information dialog.
12. Click the **Close** button to close the Patient Assessment Information window.
13. Click the **Close** button to close the Case Listing window.

### To edit an admission assessment:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear.
6. Click the **Admission** tab.
7. Make any necessary changes to the patient's admission information.
8. Click the **FIM<sup>®</sup> Instrument** tab.



9. Make any necessary changes to the admission assessment information in the Function Modifiers area and the FIM<sup>®</sup> Instrument area.
10. Click the **Save** button. After the record has been saved, an information dialog will appear.
11. Click the **OK** button to close the information dialog.
12. Click the **Close** button to close the Patient Assessment Information window.
13. Click the **Close** button to close the Case Listing window.

**To view an admission assessment:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central<sup>™</sup> page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to view.
6. Click the **View Assessments** button. The View Assessments dialog will appear.
7. View the information in the admission assessment row. The software will display the following information for each assessment:
  - The reason for the assessment (i.e., the assessment type)
  - ARD (assessment reference date)
  - Impairment group
  - Total FIM<sup>®</sup> motor rating
  - Total FIM<sup>®</sup> cognitive rating
  - Total FIM<sup>®</sup> rating
  - CMS Status
  - UDSMR<sup>®</sup> Status
8. When you are finished, click the **Close** button to close the View Assessments dialog.
9. Click the **Close** button to close the Case Listing window.

## Managing interim assessments

Although not required by CMS, interim assessments are still useful for your facility. An interim assessment monitors a patient's progress throughout the patient's rehabilitation stay. You can enter interim assessment information directly into the UDS-PROi<sup>®</sup> software. Once you have entered the information, you can edit, view, or delete it as needed.

A case record may have more than one interim assessment. Deleting an interim assessment will have no effect on other assessments for that record.

### To create an interim assessment:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to edit.
6. Click the **Add/Edit Interim/Follow-Up Assessment** button. The Patient Assessment Information window will appear. It will be open to the Interim/Follow-Up tab.
7. Click the **Add** button on the Interim/Follow-Up Toolbar.
8. Select **2 – Interim** from the **Assessment Type** drop-down field.
9. Select an assessment reference date from the **Assessment Reference Date** calendar field, or enter it manually.
10. Enter the patient's interim assessment information in the fields in the Function Modifiers area and the FIM<sup>®</sup> Instrument area.

For information about selecting and validating comorbid conditions, see page 173.

11. Enter the patient's pain level in the **Pain** field.
12. Complete any custom fields used by your facility. (Custom fields are defined at the facility level by facility administrators.)
13. Click the **Save** button on the Interim/Follow-Up toolbar. After the record has been saved, an information dialog will appear.
14. Click the **OK** button to close the information dialog.
15. Click the **Close** button to close the Patient Assessment Information window.
16. Click the **Close** button to close the Case Listing window.

### To edit an interim assessment:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.

5. Select the checkbox in the **Select** column that corresponds to the record you want to edit.
6. Click the **Add/Edit Interim/Follow-Up Assessment** button. The Patient Assessment Information window will appear. It will be open to the Interim/Follow-Up tab.
7. Make any necessary changes to the interim assessment record.
  - To change the assessment reference date, select an assessment reference date from the **Assessment Reference Date** calendar field, or enter it manually.
  - To edit the patient's interim assessment information, change the interim assessment information in the fields in the Function Modifiers area and the FIM<sup>®</sup> Instrument area.
  - To edit the patient's pain level, enter a new value in the **Pain** field.
  - To edit custom fields, change the values of the fields in the Assessment Custom area.
8. Click the **Save** button on the Interim/Follow-Up toolbar. After the record has been saved, an information dialog will appear.
9. Click the **OK** button to close the information dialog.
10. Click the **Close** button to close the Patient Assessment Information window.
11. Click the **Close** button to close the Case Listing window.

**To view an interim assessment:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to view.
6. Click the **View Assessments** button. The View Assessments dialog will appear.
7. View the information in the appropriate interim assessment row. The software will display the following information for each assessment:
  - The reason for the assessment (i.e., the assessment type)
  - ARD (assessment reference date)
  - Impairment group
  - Total FIM<sup>®</sup> motor rating
  - Total FIM<sup>®</sup> cognitive rating
  - Total FIM<sup>®</sup> rating
  - CMS Status
  - UDSMR<sup>®</sup> Status
8. When you are finished, click the **Close** button to close the View Assessments dialog.
9. Click the **Close** button to close the Case Listing window.

**To delete an interim assessment:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to edit.
6. Click the **View Assessments** button. The View Assessments dialog will appear.
7. Select the **Select** radio button that corresponds to the interim assessment you want to delete.
8. Click the **Delete Assessment** button. A confirmation dialog will appear.
9. Click the **Yes** button to close the confirmation dialog. An information dialog will appear.
10. Click the **OK** button to close the information dialog.
11. Click the **Close** button to close the View Assessments dialog.
12. Click the **Close** button to close the Case Listing window.

## Managing interrupted stays

A patient may experience an acute medical problem or condition that necessitates a transfer out of the rehabilitation facility for a short period of time (three calendar days or less). After the acute medical problem or condition has resolved, the patient returns to the rehabilitation facility. Such a break is known as an interrupted stay. You can enter interrupted stay information directly into the UDS-PROi® software, allowing you to track the number and frequency of program interruptions.

The UDS-PROi® software provides space for three interrupted stays. If a case has more than three interrupted stays, add the extra days to the third interrupted stay.

### To enter an interrupted stay:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear.
6. Click the **Discharge** tab.
7. Select **1 – Yes** from the **Program Interruptions** drop-down field.
8. Select the starting date of the interrupted stay from the first blank **Interruption Date** calendar field, or enter it manually.
9. Select the return date of the interrupted stay from the first blank **Return Date** calendar field, or enter it manually.
10. Click the **Save** button. After the record has been saved, an information dialog will appear.
11. Click the **OK** button to close the information dialog.
12. Click the **Close** button to close the Patient Assessment Information window.
13. Click the **Close** button to close the Case Listing window.

### To edit an interrupted stay:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear.
6. Click the **Discharge** tab.

7. Make any necessary changes to the interrupted stay dates.
  - To change the interruption date, select the starting date of the interrupted stay from the **Interruption Date** calendar field, or enter it manually.
  - To change the return date, select the return date of the interrupted stay from the **Return Date** calendar field, or enter it manually.
8. Click the **Save** button. After the record has been saved, an information dialog will appear.
9. Click the **OK** button to close the information dialog.
10. Click the **Close** button to close the Patient Assessment Information window.
11. Click the **Close** button to close the Case Listing window.

**To delete an interrupted stay:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear.
6. Click the **Discharge** tab.
7. Click once in the **Interruption Date** field of the interrupted stay you want to delete.
8. Press the **Delete** key on your keyboard.
9. Click once in the **Return Date** field of the interrupted stay you want to delete.
10. Press the **Delete** key on your keyboard.
11. Repeat steps 7–10 for each interrupted stay you want to delete. (If you delete all the interrupted stays for a case, select **2 – No** from the **Program Interruptions** drop-down field.)
12. Click the **Save** button. After the record has been saved, an information dialog will appear.
13. Click the **OK** button to close the information dialog.
14. Click the **Close** button to close the Patient Assessment Information window.
15. Click the **Close** button to close the Case Listing window.

## Managing discharge assessments

Required by CMS, the discharge assessment establishes a patient's baseline functional status at the time of the patient's discharge from an IRF. Once you have created a case record, you can enter discharge assessment information directly into the UDS-PROi<sup>®</sup> software. Once you have entered the information, you can edit and view it as needed.

You cannot delete a discharge assessment.

### To create a discharge assessment:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear.
6. Click the **FIM<sup>®</sup> Instrument** tab.
7. Enter the patient's discharge assessment information in the fields in the Function Modifiers area and the FIM<sup>®</sup> Instrument area.
8. Click the **Discharge** tab.
9. Select the patient's discharge date from the **Discharge Date** calendar field, or enter it manually.
10. Enter the patient's discharge information in the fields provided.
11. Click the **Save** button. After the record has been saved, an information dialog will appear.
12. Click the **OK** button to close the information dialog.
13. Click the **Close** button to close the Patient Assessment Information window.
14. Click the **Close** button to close the Case Listing window.

### To edit a discharge assessment:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear.
6. Click the **FIM<sup>®</sup> Instrument** tab.
7. Make any necessary changes to the patient's discharge assessment information.
8. Click the **Discharge** tab.

9. Make any necessary changes to the patient's discharge assessment information.
  - To change the patient's discharge date, select the patient's discharge date from the **Discharge Date** calendar field, or enter it manually.
  - To change additional discharge information, change the discharge information in the fields provided.
10. Click the **Save** button. After the record has been saved, an information dialog will appear.
11. Click the **OK** button to close the information dialog.
12. Click the **Close** button to close the Patient Assessment Information window.
13. Click the **Close** button to close the Case Listing window.

**To view a discharge assessment:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to view.
6. Click the **View Assessments** button. The View Assessments dialog will appear.
7. View the information in the discharge assessment row. The software will display the following information for each assessment:
  - The reason for the assessment (i.e., the assessment type)
  - ARD (assessment reference date)
  - Impairment group
  - Total FIM® motor rating
  - Total FIM® cognitive rating
  - Total FIM® rating
  - CMS Status
  - UDSMR® Status
8. When you are finished, click the **Close** button to close the View Assessments dialog.
9. Click the **Close** button to close the Case Listing window.



## Managing follow-up assessments

Although not required by CMS, follow-up assessments are still useful for your facility. Follow-up assessments measure the post-rehabilitation progress of discharged patients and can help your facility meet accreditation standards. Administered 80 to 180 days after discharge, follow-up assessments can provide insight into your program's effectiveness—for example, they can illustrate whether your patients make gains or experience setbacks after discharge. You can enter follow-up assessment information directly into the UDS-PROi® software. Once you have entered the information, you can edit, view, or delete it as needed.

A case record may have more than one follow-up assessment. Deleting a follow-up assessment will have no effect on other assessments for that record.

### To create a follow-up assessment:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to edit.
6. Click the **Add/Edit Interim/Follow-Up Assessment** button. The Patient Assessment Information window will appear. It will be open to the Interim/Follow-Up tab.
7. Click the **Add** button on the Interim/Follow-Up toolbar.
8. Select **4 – Follow-Up** from the **Assessment Type** drop-down field.
9. Select an assessment reference date from the **Assessment Reference Date** calendar field, or enter it manually.
10. Enter the patient's follow-up assessment information in the fields in Function Modifiers area and the FIM® Instrument area.
11. Enter the patient's follow-up information in the fields in the Follow-Up Information Only area.

For information about selecting and validating comorbid conditions, see page 173.

12. Enter the patient's pain level in the **Pain** field.
13. Complete any custom fields used by your facility. (Custom fields are defined at the facility level by facility administrators.)
14. Click the **Save** button on the Interim/Follow-Up toolbar. After the record has been saved, an information dialog will appear.
15. Click the **OK** button to close the information dialog.
16. Click the **Close** button to close the Patient Assessment Information window.
17. Click the **Close** button to close the Case Listing window.

**To edit a follow-up assessment:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to edit.
6. Click the **Add/Edit Interim/Follow-Up Assessment** button. The Patient Assessment Information window will appear. It will be open to the Interim/Follow-Up tab.
7. Make any necessary changes to the follow-up assessment record.
  - To change the assessment reference date, select an assessment reference date from the **Assessment Reference Date** calendar field, or enter it manually.
  - To edit the patient's follow-up assessment information, change the follow-up assessment information in the fields in the Function Modifiers area and the FIM® Instrument area.
  - To edit the patient's follow-up information, change the follow-up information in the fields in the Follow-Up Information Only area.
  - To edit the patient's diagnoses, enter the ICD codes in item A22, or click the **ICD Codes** button to select them.
  - To edit the patient's pain level, enter a new value in the **Pain** field.
  - To edit custom fields, change the fields in the Assessment Custom area.
8. Click the **Save** button on the Interim/Follow-Up toolbar. After the record has been saved, an information dialog will appear.
9. Click the **OK** button to close the information dialog.
10. Click the **Close** button to close the Patient Assessment Information window.
11. Click the **Close** button to close the Case Listing window.

**To view a follow-up assessment:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to view.
6. Click the **View Assessments** button. The View Assessments dialog will appear.
7. View the information in the appropriate follow-up assessment row. The software will display the following information for each assessment:
  - The reason for the assessment (i.e., the assessment type)

- ARD (assessment reference date)
  - Impairment group
  - Total FIM<sup>®</sup> motor rating
  - Total FIM<sup>®</sup> cognitive rating
  - Total FIM<sup>®</sup> rating
  - CMS Status
  - UDSMR<sup>®</sup> Status
8. When you are finished, click the **Close** button to close the View Assessments dialog.
  9. Click the **Close** button to close the Case Listing window.

**To delete a follow-up assessment:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central<sup>™</sup> page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to edit.
6. Click the **View Assessments** button. The View Assessments dialog will appear.
7. Select the **Select** radio button that corresponds to the follow-up assessment you want to delete.
8. Click the **Delete Assessment** button. A confirmation dialog will appear.
9. Click the **Yes** button to close the confirmation dialog. An information dialog will appear.
10. Click the **OK** button to close the information dialog.
11. Click the **Close** button to close the View Assessments dialog.
12. Click the **Close** button to close the Case Listing window.

## Using the FIM<sup>®</sup> Track module

You can use the UDS-PROi<sup>®</sup> software's FIM<sup>®</sup> Track module to record FIM<sup>®</sup> ratings for the three-day assessment period at admission and discharge. The module determines the most dependent rating for the admission assessment period and allows you to select the most representative set of ratings for the discharge assessment period. The selected ratings are then brought into the patient record, saving you the need to determine which ratings to enter into the fields in the FIM<sup>®</sup> Instrument tab. By using the FIM<sup>®</sup> Track module, you can take the guesswork out of rating patients at admission and discharge.

### To access the FIM<sup>®</sup> Track – Admission module:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central<sup>™</sup> page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear. It will be open to the Identification tab.
6. Click the **FIM<sup>®</sup> Instrument** tab.
7. Click the **FIM<sup>®</sup> Track – Admission** button. The FIM<sup>®</sup> Track – Admission dialog will appear.

### To access the FIM<sup>®</sup> Track – Discharge module:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central<sup>™</sup> page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear. It will be open to the Identification tab.
6. Click the **FIM<sup>®</sup> Instrument** tab.
7. Click the **FIM<sup>®</sup> Track – Discharge** button. The FIM<sup>®</sup> Track – Discharge dialog will appear.

### To enter admission assessment ratings for a patient:

1. Open the FIM<sup>®</sup> Track – Admission dialog.
2. Select the radio button (**8 hour shifts** or **12 hour shifts**) that corresponds to the length of each shift at your facility.

If you select the twelve-hour option after entering data for the third shift, a confirmation dialog will appear, warning you that all third-shift values will be erased. Click the **Yes** button to confirm your selection and close the confirmation dialog.

3. Enter the individual item ratings for each shift across each of the three twenty-four-hour periods provided. The software will populate the lowest rating for each item into the **Total** column at the far right of the dialog.
  - To record the ratings for Bladder Frequency of Accidents and Bowel Frequency of Accidents, enter the number of accidents the patient has each day in the field provided.
  - Be sure to select the appropriate modes from the **Anticipated Discharge Location Mode**, **Comprehension Mode**, and **Expression Mode** drop-down fields.
4. Click the **Calculate** button to calculate the CMG, ELOS, and FPP for the case.
  - You cannot calculate CMG and ELOS values unless (1) all FIM<sup>®</sup> items and modes have been completed and (2) a birth date and admission impairment group have been entered for the case.
  - FPP information will not appear unless you have set up your facility's PPS information. In addition, the FPP value will be blank if the module cannot calculate the CMG and ELOS values.
5. Click the **Save** button to save the ratings. An information dialog will appear.
6. Click the **OK** button to close the information dialog.
7. Click the **Close** button to close the FIM<sup>®</sup> Track – Admission dialog.

**To enter discharge assessment ratings for a patient:**

1. Open the FIM<sup>®</sup> Track – Discharge dialog.
2. Select the radio button (**8 hour shifts** or **12 hour shifts**) that corresponds to the length of each shift at your facility.

If you select the twelve-hour option after entering data for the third shift, a confirmation dialog will appear, warning you that all third-shift values will be erased. Click the **Yes** button to confirm your selection and close the warning dialog.

3. Select the patient's anticipated discharge date from the **Anticipated Discharge Date** calendar field, or enter it manually. (If the case record contains an actual discharge date, this date will be used to populate the Anticipated Discharge Date field each time the FIM<sup>®</sup> Track – Discharge dialog is opened.)
4. Enter the individual item ratings for each shift across each of the three twenty-four-hour periods provided. The software will populate the lowest rating for each item into the **Total** column at the far right of each period.
  - To record the ratings for Bladder Frequency of Accidents and Bowel Frequency of Accidents, enter the number of accidents the patient has each day in the field provided.
  - Be sure to select the appropriate modes from the **Discharge Locomotion Mode**, **Comprehension Mode**, and **Expression Mode** drop-down fields.
5. Click the **Save** button to save the ratings. An information dialog will appear.
6. Click the **OK** button to close the information dialog.
7. Click the **Close** button to close the FIM<sup>®</sup> Track – Discharge dialog.

**To select admission ratings for a patient:**

1. Open the FIM<sup>®</sup> Track – Admission dialog.
2. Click the **Select Total** button. The software will populate the information in the Total column to the admission fields in the FIM<sup>®</sup> Instrument tab, and the FIM<sup>®</sup> Track – Admission dialog will close.

**To select discharge ratings for a patient:**

1. Open the FIM<sup>®</sup> Track – Discharge dialog.
2. Click the **Select Total** button that corresponds to the twenty-four-hour period you want to use for the patient's discharge assessment. The software will populate the information in the selected Total column to the discharge fields in the FIM<sup>®</sup> Instrument tab, and the FIM<sup>®</sup> Track – Discharge dialog will close.

**To generate an admission FIM<sup>®</sup> Track report:**

1. Open the FIM<sup>®</sup> Track – Admission dialog.
2. Click the **Report** button. The Report Type dialog will appear.
3. Select a file format from the drop-down field. Five formats are available:
  - Adobe<sup>®</sup> Acrobat<sup>®</sup> (PDF file)
  - Microsoft<sup>®</sup> Excel
  - Microsoft<sup>®</sup> Word
  - Comma-separated value (CSV)
  - XML
4. Click the **OK** button. The FIM<sup>®</sup> Track – Admission Report will open in a new window.

**To generate a discharge FIM<sup>®</sup> Track report:**

1. Open the FIM<sup>®</sup> Track – Discharge dialog.
2. Click the **Report** button. The Report Type dialog will appear.
3. Select a file format from the drop-down field. Five formats are available:
  - Adobe<sup>®</sup> Acrobat<sup>®</sup> (PDF file)
  - Microsoft<sup>®</sup> Excel
  - Microsoft<sup>®</sup> Word
  - Comma-separated value (CSV)
  - XML
4. Click the **OK** button. The FIM<sup>®</sup> Track – Discharge Report will open in a new window.

**To print a generated report:**

1. Click the print icon. A printer dialog will appear.
2. Configure your printer options.

3. Click the **Print** button.

**To save a generated report:**

1. Click the save icon. The Save As dialog will appear.
2. Select a folder on your network.
3. Enter a name for the exported report file in the **File name** field.
4. Select an export format from the **Save as type** drop-down field.
5. Click the **Save** button. An information dialog will appear.
6. Click the **OK** button to close the information dialog.

**To close a generated report:**

1. Click the **X** in the upper right corner of the report window.
2. Click the **Close** button to close the FIM<sup>®</sup> Track dialog.
3. Click the **Close** button to close the Case Listing window.
4. Click the **Close** button to close the FIM<sup>®</sup> Track dialog.

## Viewing informatics data

You can use the UDS-PROi<sup>®</sup> software to view real-time informatics data, which compares your facility's data with regional and national benchmark data by CMG.

Before you can view informatics data, you must update your facility's informatics data.

### To view informatics for a case:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to view. The Patient Assessment Information window will appear.
6. Click the **Informatics** tab.
7. Select a facility discharge time frame from the **Facility Time Period** drop-down field. The selection is keyed to discharge dates. If you select Last 90 Days, for example, your facility's data will include every discharge in the last ninety days with the same CMG as the open case record.
8. Select a regional/national benchmark comparison time frame from the **Nation/Region Time Period** drop-down field. The Year option includes all data from the previous four quarters.
9. Click the **Refresh** button. The information in the Current View area will change to reflect the new comparison ranges. (If you did not select a new facility discharge time frame or a new regional/national benchmark comparison time frame, you do not need to click the Refresh button.)
10. Review the comparison data provided in the Informatics tab.
11. Use the scroll bar to scroll to the bottom of the Informatics tab. The Current Case FIM<sup>®</sup> Scores by RCMG grid will appear.
  - **To view the grid as a graph:**
    1. Click the **Graph View** button. The Current Case FIM<sup>®</sup> Scores by RCMG graph will appear. By default, the graph displays four sets of case-specific information, three sets of facility data, three sets of regional data, and three sets of national data.
    2. Use the thirteen checkboxes to the right of the graph to select the data elements you want to include in the graph.
    3. Select the data element you want to use as a sorting standard from the **Sort** drop-down field. The FIM<sup>®</sup> items in the graph will be sorted according to their ratings for the selected sorting standard. The items will appear from left to right in increasing value. (The thirteen motor items will appear before the five cognitive items.)
    4. Click the **Update** button to refresh the graph with the options you selected in steps 2 and 3.
    5. If you want to switch back to grid view, click the **Grid View** button.



12. When you are finished viewing informatics data, click the **Close** button to close the Patient Assessment Information window.
13. Click the **Close** button to close the Case Listing window.

**To view the informatics data in report form:**

1. Follow the directions above to open the case record and configure the Current Case FIM<sup>®</sup> Scores by RCMG information in graph or grid form.
2. Click the **Generate Report** button. The Report Type dialog will appear.
3. Select a file format from the drop-down field. Five formats are available:
  - Adobe<sup>®</sup> Acrobat<sup>®</sup> (PDF file)
  - Microsoft<sup>®</sup> Excel
  - Microsoft<sup>®</sup> Word
  - Comma-separated value (CSV)
  - XML
4. Click the **OK** button. The report will open in a separate window.

**To print a generated report:**

1. Click the print icon. A printer dialog will appear.
2. Configure your printer options.
3. Click the **Print** button.

**To save a generated report:**

1. Click the save icon. The Save As dialog will appear.
2. Select a folder on your network.
3. Enter a name for the exported report file in the **File name** field.
4. Select an export format from the **Save as type** drop-down field.
5. Click the **Save** button. An information dialog will appear.
6. Click the **OK** button to close the information dialog.

**To close a generated report:**

1. Click the **X** in the upper right corner of the report window.
2. Click the **Close** button to close the Patient Assessment Information window.
3. Click the **Close** button to close the Case Listing window.

## Locking and unlocking case records

The Case Listing window contains a list of all case records for your facility. The UDS-PROi® software allows you to lock and unlock these records. Users can't edit locked case records. You can lock records at any time, for any reason. For example, you might lock a record prior to review or after discharge.

You must lock a record before you transmit it to CMS.

### To lock a case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear. The information in the Lockdown Status column on the case listing appears in color-coded cells: **red** for **locked** records and **green** for **unlocked** records.
5. Select the checkbox in the **Select** column that corresponds to the record you want to lock.
6. Click the **Lock/Unlock** button.
7. Click the **Close** button to close the Case Listing window.

You also can use the Lock/Unlock button in the Patient Assessment Information window to toggle the case's Lockdown Status.

### To unlock a case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear. The information in the Lockdown Status column on the case listing appears in color-coded cells: **red** for **locked** records, **green** for **unlocked** records.
5. Select the checkbox in the **Select** column that corresponds to the record you want to unlock.
6. Click the **Lock/Unlock** button.
7. Click the **Close** button to close the Case Listing window.

You also can use the Lock/Unlock button in the Patient Assessment Information window to toggle the case's Lockdown Status.

## Understanding errors and transmission criteria

Each case record has a CMS Status and a UDSMR<sup>®</sup> Status. These fields determine whether a case record is ready for transmission to CMS or UDSMR, respectively.

- A record that is ready for transmission to CMS will indicate “CMS” in the CMS Status column. This means that all CMS-required fields are complete and free of error.
- A record that is ready for transmission to UDSMR will indicate “UDSMR” in the UDSMR<sup>®</sup> Status column. This means that all UDSMR-required fields are complete and free of errors.
- A record that is not ready for transmission to either destination will indicate “Error” in the relevant status column. This means that the required fields are either incomplete or in error.

The CMS Status also includes a Non-Med value. This value covers all non-Medicare cases (i.e., all cases that have a non-Medicare Primary Payment Source and a non-Medicare Secondary Payment Source). You do not need to transmit such cases to CMS.

A record can be locked regardless of error status, but it cannot be transmitted unless the following conditions are met:

1. The record is locked (applies to CMS transmissions only).
2. The record is not in error.

You do not have to transmit cases to UDSMR, but UDSMR will not accept data for a case with a UDSMR<sup>®</sup> Status of Error.

## Generating the Error Report

The Case Listing window contains a list of all case records for your facility. You can use the UDS-PROi® software to generate a report on the errors present in a case record. This report generates a list of all missing fields required by CMS or UDSMR. You can use this report to help you ready a case record for transmission.

### To generate the report from the case listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to report on.
6. Click the **Error Report** button. The Check Patient Data dialog will appear.

### To generate the report from an open case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to report on. The Patient Assessment Information window will appear.
6. Click the **Error Report** button. The Check Patient Data dialog will appear.

### To print a generated report:

1. Click the **Print** button. A printer dialog will appear.
2. Configure your printer options.
3. Click the **Print** button.

### To close a generated report:

1. Click the **Close** button to close the Check Patient Data dialog.
2. Click the **Close** button to close the Case Listing window.

If you generated the Error Report from an open case record, click the **Close** button to close the Patient Assessment Information window, and then click the **Close** button to close the Case Listing window.

## Signing the IRF-PAI

CMS requires that a rehabilitation physician sign, date, and time the IRF-PAI as a means of authenticating the collected information. The UDS-PROi<sup>®</sup> software allows IRFs to meet this requirement by requiring the username and password of the account that will be used to sign the record. The software assigns the date and time automatically when the record is signed.

A user does not have to be logged in to the UDS-PROi<sup>®</sup> software to sign the IRF-PAI. The software will prompt the logged-in user for the username and password of the user who will sign the record, even if the logged-in user has the required signing privileges. The user who is signing the record should enter the user account information. For security reasons, users should not share their passwords with **anyone**.

### To sign the IRF-PAI for a case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear. It will be open to the Identification tab.
6. Click the **Sign IRF-PAI** button. The PAI Signature dialog will appear.
7. Enter the username and password of the signee's account in the **Username** and **Password** fields, respectively.
8. Click the **Save** button to close the PAI Signature dialog.
9. Click the **Save** button. After the record has been saved, an information dialog will appear.
10. Click the **OK** button to close the information dialog.
11. Click the **Close** button to close the Patient Assessment Information window.
12. Click the **Close** button to close the Case Listing window.

## Generating the Patient Assessment Instrument Report

The Case Listing window contains a list of all case records for your facility. You can use the UDS-PROi® software to view a formatted version of a patient's IRF-PAI information. After you generate this report, you can print and save it for many uses, including staff meetings and QA reviews.

### To generate the report from the case listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to report on.
6. Generate the report.

- **To generate the report with the default header and footer:**

1. Click the **IRF-PAI Report** button. The Report Type dialog will appear.
2. Select a file format from the drop-down field. Five formats are available:
  - Adobe® Acrobat® (PDF file)
  - Microsoft® Excel
  - Microsoft® Word
  - Comma-separated value (CSV)
  - XML
3. Click the **OK** button. The IRF-PAI Report will open in a separate window.

- **To generate the report with a customized header and footer:**

1. Select the **Change header/footer** checkbox.
2. Click the **IRF-PAI Report** button. The Report Type dialog will appear.
3. Select a file format from the drop-down field. Five formats are available:
  - Adobe® Acrobat® (PDF file)
  - Microsoft® Excel
  - Microsoft® Word
  - Comma-separated value (CSV)
  - XML
4. Click the **OK** button. The IRF-PAI Report dialog will appear.
5. Customize the header and footer.

- **To select fields for the report header:**
  1. Click the **Header** button. The Report Header dialog will appear.
  2. Make your selections.
    - **To select a field for inclusion in the header:**
      1. Select a table from the **Table Name** drop-down field.
      2. Click once in the Available Fields display window on the field you want to select.
      3. Click the > button. The selected field will appear in the Selected Fields display window.
      4. Repeat steps 1–3 for each field you want to include in the report header.
    - **To select all the fields from a table for inclusion in the header:**
      1. Select a table from the **Table Name** drop-down field.
      2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
      3. Repeat steps 1 and 2 for each table whose fields you want to include in the report header.
    - **To exclude a selected field:**
      1. Click once on a field in the Selected Fields display window.
      2. Click the < button.
    - To exclude all selected fields, click the << button.
  3. Click the **Select** button.
- To enter text directly into the report header, type the text directly into the **Header** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report header; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the header when the report is generated.
- **To select fields for the report footer:**
  1. Click the **Footer** button. The Report Footer dialog will appear.
  2. Make your selections.
    - **To select a field for inclusion in the footer:**
      1. Select a table from the **Table Name** drop-down field.
      2. Click once in the Available Fields display window on the field you want to select.
      3. Click the > button. The selected field will appear in the Selected Fields display window.

4. Repeat steps 1–3 for each field you want to include in the report footer.
- **To select a table for inclusion in the footer:**
    1. Select a table from the **Table Name** drop-down field.
    2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
    3. Repeat steps 1 and 2 for each table whose fields you want to include in the report footer.
  - **To exclude a selected field:**
    1. Click once on a field in the Selected Fields display window.
    2. Click the < button.
  - To exclude all selected fields, click the << button.
3. Click the **Select** button.
- To enter text directly into the report footer, type the text directly into the **Footer** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report footer; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the footer when the report is generated.
  - **To save your header and footer selections:**
    1. Click the **Save** button. An information dialog will appear.
    2. Click the **OK** button to close the information dialog.
6. Click the **Generate Report** button. The Patient Assessment Instrument Report will appear in a separate window.

**To generate the report from an open case record:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to report on. The Patient Assessment Information window will appear.
6. Generate the report.
  - **To generate the report with the default header and footer:**
    1. Click the **IRF-PAI Report** button. The Report Type dialog will appear.
    2. Select a file format from the drop-down field. Five formats are available:
      - Adobe® Acrobat® (PDF file)



- Microsoft® Excel
  - Microsoft® Word
  - Comma-separated value (CSV)
  - XML
3. Click the **OK** button. The IRF-PAI Report will open in a separate window.
- **To generate the report with a customized header and footer:**
    1. Select the **Change header/footer** checkbox.
    2. Click the **IRF-PAI Report** button. The Report Type dialog will appear.
    3. Select a file format from the drop-down field. Five formats are available:
      - Adobe® Acrobat® (PDF file)
      - Microsoft® Excel
      - Microsoft® Word
      - Comma-separated value (CSV)
      - XML
    4. Click the **OK** button. The IRF-PAI Report dialog will appear.
    5. Customize the header and footer.
      - **To select fields for the report header:**
        1. Click the **Header** button. The Report Header dialog will appear.
        2. Make your selections.
          - **To select a field for inclusion in the header:**
            1. Select a table from the **Table Name** drop-down field.
            2. Click once in the Available Fields display window on the field you want to select.
            3. Click the > button. The selected field will appear in the Selected Fields display window.
            4. Repeat steps 1–3 for each field you want to include in the report header.
          - **To select all the fields from a table for inclusion in the header:**
            1. Select a table from the **Table Name** drop-down field.
            2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
            3. Repeat steps 1 and 2 for each table whose fields you want to include in the report header.

- **To exclude a selected field:**
  1. Click once on a field in the Selected Fields display window.
  2. Click the < button.
- To exclude all selected fields, click the << button.
- 3. Click the **Select** button.
- To enter text directly into the report header, type the text directly into the **Header** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report header; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the header when the report is generated.
- **To select fields for the report footer:**
  1. Click the **Footer** button. The Report Footer dialog will appear.
  2. Make your selections.
    - **To select a field for inclusion in the footer:**
      1. Select a table from the **Table Name** drop-down field.
      2. Click once in the Available Fields display window on the field you want to select.
      3. Click the > button. The selected field will appear in the Selected Fields display window.
      4. Repeat steps 1–3 for each field you want to include in the report footer.
    - **To select a table for inclusion in the footer:**
      1. Select a table from the **Table Name** drop-down field.
      2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
      3. Repeat steps 1 and 2 for each table whose fields you want to include in the report footer.
    - **To exclude a selected field:**
      1. Click once on a field in the Selected Fields display window.
      2. Click the < button.
    - To exclude all selected fields, click the << button.
  3. Click the **Select** button.
- To enter text directly into the report footer, type the text directly into the **Footer** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report footer; any text contained within the parameter

indicators will be treated as a parameter, and the software will insert the parameter's value into the footer when the report is generated.

- **To save your header and footer selections:**

1. Click the **Save** button. An information dialog will appear.
2. Click the **OK** button to close the information dialog.
6. Click the **Generate Report** button. The Patient Assessment Instrument Report will appear in a separate window.

**To print a generated report:**

1. Click the print icon. A printer dialog will appear.
2. Configure your printer options.
3. Click the **Print** button.

**To save a generated report:**

1. Click the save icon. The Save As dialog will appear.
2. Select a folder on your network.
3. Enter a name for the exported report file in the **File name** field.
4. Select an export format from the **Save as type** drop-down field.
5. Click the **Save** button. An information dialog will appear.
6. Click the **OK** button to close the information dialog.

**To close a generated report:**

1. Click the **X** in the upper right corner of the report window.
2. Click the **Close** button to close the Case Listing window.

If you generated the IRF-PAI Report from an open case record, click the **Close** button to close the Patient Assessment Information window, and then click the **Close** button to close the Case Listing window.

**To change the header and footer without generating the report:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the **Change header/footer** checkbox.
6. Select any checkbox in the **Select** column.
7. Click the **IRF-PAI Report** button. The Report Type dialog will appear.

8. Select a file format from the drop-down field. Five formats are available:
  - Adobe® Acrobat® (PDF file)
  - Microsoft® Excel
  - Microsoft® Word
  - Comma-separated value (CSV)
  - XML
9. Click the **OK** button. The IRF-PAI Report dialog will appear.
10. Customize the header and footer.
  - **To select fields for the report header:**
    1. Click the **Header** button. The Report Header dialog will appear.
    2. Make your selections.
      - **To select a field for inclusion in the header:**
        1. Select a table from the **Table Name** drop-down field.
        2. Click once in the Available Fields display window on the field you want to select.
        3. Click the > button. The selected field will appear in the Selected Fields display window.
        4. Repeat steps 1–3 for each field you want to include in the report header.
      - **To select a table for inclusion in the header:**
        1. Select a table from the **Table Name** drop-down field.
        2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
        3. Repeat steps 1 and 2 for each table whose fields you want to include in the report header.
      - **To exclude a selected field:**
        1. Click once on a field in the Selected Fields display window.
        2. Click the < button.
      - To exclude all selected fields, click the << button.
    3. Click the **Select** button.
    - To enter text directly into the report header, type the text directly into the **Header** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report header; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the header when the report is generated.

- **To select fields for the report footer:**
    1. Click the **Footer** button. The Report Footer dialog will appear.
    2. Make your selections.
      - **To select a field for inclusion in the footer:**
        1. Select a table from the **Table Name** drop-down field.
        2. Click once in the Available Fields display window on the field you want to select.
        3. Click the > button. The selected field will appear in the Selected Fields display window.
        4. Repeat steps 1–3 for each field you want to include in the report footer.
      - **To select a table for inclusion in the footer:**
        1. Select a table from the **Table Name** drop-down field.
        2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
        3. Repeat steps 1 and 2 for each table whose fields you want to include in the report footer.
      - **To exclude a selected field:**
        1. Click once on a field in the Selected Fields display window.
        2. Click the < button.
      - To exclude all selected fields, click the << button.
    3. Click the **Select** button.
  - To enter text directly into the report footer, type the text directly into the **Footer** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report footer; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the footer when the report is generated.
11. Click the **Save** button. An information dialog will appear.
  12. Click the **OK** button to close the information dialog.
  13. Click the **Close** button to close the IRF-PAI Report dialog.
  14. Click the **Close** button to close the Case Listing window.

## Generating the pre-admit document

You can use the UDS-PROi<sup>®</sup> software to view and print the pre-admit document, which presents a formatted version of a patient's preadmission information.

### To generate the pre-admit document from the case listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to report on. To report on multiple records, select the checkbox in the **Select** column for each record you want to include in the report.
6. Click the **Pre-admit Document** button. The Pre-admit Document dialog will appear. (If one or more of the selected records do not have an associated preadmission record, an information dialog will appear. Click the **OK** button to close the dialog.)
  - To include custom fields in the pre-admit document, select the **With Custom Fields** checkbox.
  - To include note fields in the pre-admit document, select the **With Notes** checkbox.
7. Click the **Print** button. The pre-admit document will appear in a separate window.

### To generate the pre-admit document from an open case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to report on. The Patient Assessment Information window will appear.
6. Click the **Pre-admit Document** button. The Pre-admit Document dialog will appear. (If the open case record does not have an associated preadmission record, an information dialog will appear. Click the **OK** button to close the information dialog. You will be unable to generate a pre-admit document for this record.)
  - To include custom fields in the pre-admit document, select the **With Custom Fields** checkbox.
  - To include note fields in the pre-admit document, select the **With Notes** checkbox.
7. Click the **Print** button. The pre-admit document will appear in a separate window.

### To print a generated report:

1. Open the **File** menu in Adobe Reader.
2. Click the **Print** button. The Print dialog will appear.

3. Configure your printer options.
4. Click the **Print** button.

**To save a generated report:**

1. Open the **File** menu.
2. Select **Save As**, and then click the **PDF** button. The Save As dialog will appear.
3. Select a folder on your network.
4. Enter a name for the exported report file in the **File name** field.
5. Select an export format from the **Save as type** drop-down field.
6. Click the **Save** button.

**To close a generated report:**

1. Click the **X** in the upper right corner of the Adobe Reader window.
2. Click the **Close** button to close the Case Listing window.

If you generated the pre-admit document from an open case record, click the **Close** button to close the Patient Assessment Information window, and then click the **Close** button to close the Case Listing window.

## Inactivating case records

You must inactivate a record in the UDS-PROi<sup>®</sup> software if you plan to change any of the following fields after you have submitted the record to CMS:

- First Name
- Last Name
- Birth Date
- Social Security Number
- Gender
- Facility Medicare Provider Number (also known as the CMS Certification Number, or “CCN”)
- State Abbreviation (from the software’s facility setup module)
- Admission Date
- Discharge Date

Before making the changes, you should inactivate the previously submitted record and then transmit it to CMS for inactivation.

### To inactivate a case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central<sup>™</sup> page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to inactivate.
6. Click the **Inactivate CMS** button. The Inactivation File dialog will appear.
7. Verify that the CMS correction number is correct, and then click the **OK** button to close the Inactivation File dialog. (You can enter a new number if needed.) The Download dialog will appear.
8. Click the **Download** button to download a CMS export file containing the inactivated record.
9. Save the file to your network.
10. Click the **Close** button to close the Download dialog.
11. Click the **Close** button to close the Case Listing window.
12. Use the CMSNet system to transmit the CMS export file from step 8 to CMS for inactivation.

Check your final verification report to ensure that CMS received the record. CMS will delete from its database any inactivated record it receives. You can then edit the case record, prepare a CMS export file that contains the edited record, and use the CMSNet system to submit the new data to CMS, as explained on pages 99 and 240.



## **Managing Audit Denial Records**

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### **About audit denial records**

You can use the UDS-PROi<sup>®</sup> software to build an audit denial listing database, which puts all of your audit denial information at your fingertips for easy access and editing. This information includes important dates, reasons for the decisions rendered at each stage of the appeals process, and the name of the person responsible for following up on any denial. You can use this information to track denials through the Medicare appeals process.

## Viewing the audit denial listing

The Audit Denial Tracking System window contains a list of all audit denial records for your facility.

### To view the audit denial listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.

The rows are color-coded by date. If today's date is later than any reminder date associated with the record, the row will be highlighted in orange.

## Customizing the audit denial listing

The Audit Denial Tracking System window contains a list of all audit denial records for your facility. By default, this window displays a limited number of fields for each record. You can customize the listing by selecting and arranging the fields on display. The new settings will be active for you each time you log in to the UDSPRO Central™ website.

### To customize the audit denial listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.
5. Click the **Customize Layout** button. The Customize Layout dialog will appear.
6. Select a facility code from the **Facility** drop-down field.
7. Customize the list of fields on display.
  - **To add a field to view:**
    1. Click once on a field in the All Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
    2. Click the **Add** button. The selected field will appear in the Selected Fields display window.
  - **To move a field's position:**
    1. Click once on a field in the Selected Fields display window.
    2. Use the **Move Up** and **Move Down** buttons to move the field in relation to the other fields in the Selected Fields display window.
  - **To remove a field from view:**
    1. Click once on a field in the Selected Fields display window. (To select multiple fields, use the **Ctrl** and **Shift** keys on your keyboard as you would in any Windows® application.)
    2. Click the **Remove** button. The selected field will disappear from the Selected Fields display window.
8. Click the **Sort Options** button. The Sort Options dialog will appear.
9. Select a primary sorting field from the **Sort Items By** drop-down field.
10. Select a sorting option for the primary sorting field.
  - To sort the list in ascending order, select the **Asc** radio button.
  - To sort the list in descending order, select the **Desc** radio button.
11. Select up to two additional sorting fields from the **Then By** drop-down fields.

12. Select a sorting option for each field you selected in step 11.
13. Click the **Save** button to save your changes. An information dialog will appear.
14. Click the **OK** button to close the information dialog.
15. Click the **Close** button to close the Sort Options dialog.
16. Click the **Close** button to close the Customize Layout dialog.
17. Click the **Close** button to close the Audit Denial Tracking System window.


## Viewing audit denial records

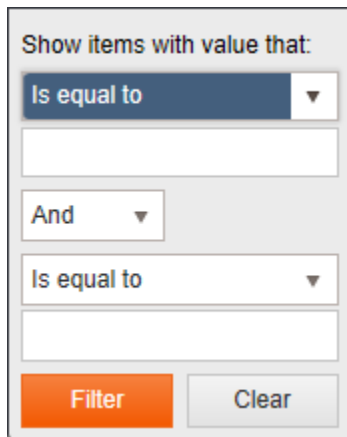
The Audit Denial Tracking System window contains a list of all audit denial records for your facility. You can use the features of this window to view records in more detail.

### To view audit denial records:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to view. The software will open the audit denial record.

- **To search a particular column:**


1. Click the blue filter icon  to the right of the name of the column whose data you want to search. A filter dialog will appear.



The image shows a filter dialog box titled "Show items with value that:". It contains two rows of filter criteria. The first row has a dropdown menu set to "Is equal to" and an empty text input field. The second row has a dropdown menu set to "And", followed by another dropdown menu set to "Is equal to" and another empty text input field. At the bottom of the dialog are two buttons: "Filter" (orange) and "Clear" (grey).

2. Use the fields in this dialog to configure the criteria the software will use to find matching records.
3. Click the **Filter** button.

- **To clear the search results for a filtered column:**

1. Click the white filter icon  that appears to the right of the column whose data you filtered on. A filter dialog will appear.
2. Click the **Clear** button.
6. Use the available tabs to navigate the audit denial record.
7. When you are finished viewing the audit denial record, click the **Close** button to close the open record.
8. Click the **Close** button to close the Audit Denial Tracking System window.

## Creating audit denial records

The Audit Denial Tracking System window contains a list of all audit denial records for your facility. You can use the UDS-PROi<sup>®</sup> software to create audit denial records for case records that are under audit by your fiscal intermediary or Medicare administrative contractor.

### To create a new audit denial record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central<sup>™</sup> page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to select.
6. Click the **Audit Denial** button. The Audit Denial – Start Appeal dialog will appear.
7. Select the organization that made the initial request from the **Request Made By** drop-down field.
8. Select the date of the request letter from the **Request Letter Date** calendar field, or enter it manually.
9. Enter the number of days your facility has been given to respond in the **Days to Respond** field.
10. Select the due date of your facility's response from the **Due Date** calendar field, or enter it manually.

If you leave this field blank, the UDS-PROi<sup>®</sup> software will use the information in the Request Letter Date field and the Days to Respond field to calculate it.
11. Click the **Start Appeal** button. The software will create an audit denial record for the case. When the record has been completed, an information dialog will appear.
12. Click the **OK** button to close the information dialog. The Audit Denial – Start Appeal dialog will close, the Case Listing window will close, and the Audit Denial Tracking System window will appear.


## Editing audit denial records

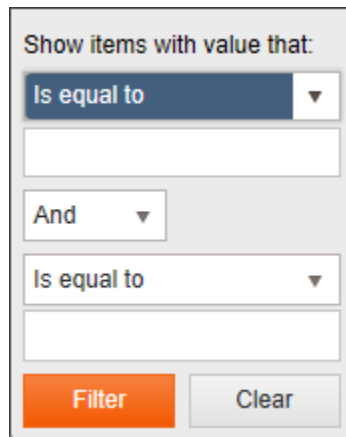
The Audit Denial Tracking System window contains a list of all audit denial records for your facility. You can use the UDS-PROi® software to edit audit denial records for your cases.

### To make changes to the fields in a particular stage of an audit denial record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The software will open the audit denial record.

- **To search a particular column:**


1. Click the blue filter icon  to the right of the name of the column whose data you want to search. A filter dialog will appear.



The image shows a filter dialog box titled "Show items with value that:". It contains two rows of filter criteria. The first row has a dropdown menu set to "Is equal to" and an empty text input field. The second row has a dropdown menu set to "And", followed by another dropdown menu set to "Is equal to" and another empty text input field. At the bottom of the dialog are two buttons: "Filter" (orange) and "Clear" (grey).

2. Use the fields in this dialog to configure the criteria the software will use to find matching records.
3. Click the **Filter** button.

- **To clear the search results for a filtered column:**

1. Click the white filter icon  that appears to the right of the column whose data you filtered on. A filter dialog will appear.
2. Click the **Clear** button.

6. Click the tab link that corresponds to the level you want to edit. Six tabs are available:

- **Documentation:** This tab contains fields related to additional documentation requests (ADRs) and medical records requests. These requests are the first step in an audit.

- **Redetermination (Appeal):** This tab contains fields related to redetermination requests, which constitute the first level of the Medicare appeals process.
- **Reconsideration (QIC):** This tab contains fields related to reconsideration requests to your facility’s qualified independent contractor (QIC), which constitute the second level of the Medicare appeals process.
- **Hearing Request (ALJ):** This tab contains fields related to the administrative law judge (ALJ) hearing process, which constitutes the third level of the Medicare appeals process.
- **Departmental Appeals Board (DAB):** This tab contains fields related to the Departmental Appeals Board (DAB). Appeals to the DAB constitute the fourth level of the Medicare appeals process.
- **Federal District Court (FDC):** This tab contains fields related to appeals handled in a federal district court. Such appeals constitute the fifth level of the Medicare appeals process.

7. Make any necessary changes to the fields available in the tab you selected.

You cannot change the outcome of the response for an ADR or any of the first four appeal levels unless you first cancel all additional steps in the appeals process. See the instructions on page 147 for more information.

8. Repeat steps 6 and 7 for each tab you want to edit.

9. When you are finished editing the audit denial record, click the **Save** button. An information dialog will appear.

10. Click the **OK** button to close the information dialog.

11. Click the **Close** button to close the open record.

12. Click the **Close** button to close the Audit Denial Tracking System window.


**To activate the next step in an appeal:**

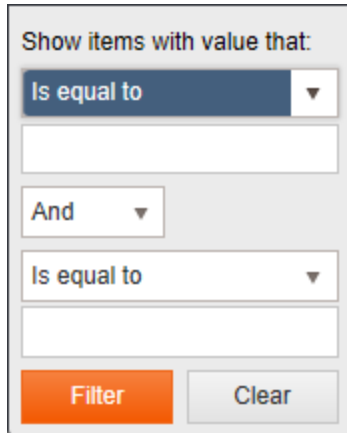
1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.



- Click the link in the **Patient ID** column that corresponds to the record you want to edit. The software will open the audit denial record to the most recent level in the appeals process.

- To search a particular column:**

- Click the blue filter icon  to the right of the name of the column whose data you want to search. A filter dialog will appear.




The image shows a filter dialog box with the following elements:

- Title: "Show items with value that:"
- Operator 1: "Is equal to" (dropdown menu)
- Field 1: An empty text input field.
- Operator 2: "And" (dropdown menu)
- Operator 3: "Is equal to" (dropdown menu)
- Field 2: An empty text input field.
- Buttons: "Filter" (orange) and "Clear" (grey).

- Use the fields in this dialog to configure the criteria the software will use to find matching records.
- Click the **Filter** button.

- To clear the search results for a filtered column:**

- Click the white filter icon  that appears to the right of the column whose data you filtered on. A filter dialog will appear.
- Click the **Clear** button.


- Click the **Activate Next Step** button. The software will add a new tab to the record for the next level in the appeals process.

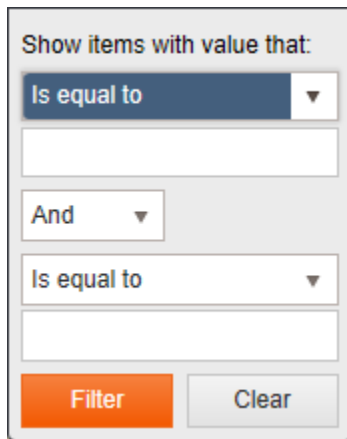
The FDC level is the last level of the Medicare appeals process. You cannot activate additional steps beyond this level.


- Complete any required fields in the new tab.
- Repeat steps 6 and 7 for each level you want to activate.
- When you are finished editing the audit denial record, click the **Save** button. An information dialog will appear.
- Click the **OK** button to close the information dialog.
- Click the **Close** button to close the open record.
- Click the **Close** button to close the Audit Denial Tracking System window.

**To cancel the most recent step in an appeal:**

- Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.

2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The software will open the audit denial record to the most recent level in the appeals process.
  - **To search a particular column:**
    1. Click the blue filter icon  to the right of the name of the column whose data you want to search. A filter dialog will appear.



2. Use the fields in this dialog to configure the criteria the software will use to find matching records.
3. Click the **Filter** button.
- **To clear the search results for a filtered column:**
  1. Click the white filter icon  that appears to the right of the column whose data you filtered on. A filter dialog will appear.
  2. Click the **Clear** button.
6. Click the **Cancel Appeal** button in the active tab. (The label on the button will vary according to the appeal level.) A confirmation dialog will appear.
7. Click the **Yes** button to confirm your selection and cancel the open appeal level. The software will remove the tab from the record, and the tab for the previous appeal level will open.
 


The ADR level is the first stage of the Medicare appeals process. You cannot cancel this level, but you can delete the audit denial record, as explained on page 157.
8. Repeat steps 6 and 7 for each level you want to cancel.
9. When you are finished editing the audit denial record, click the **Save** button. An information dialog will appear.

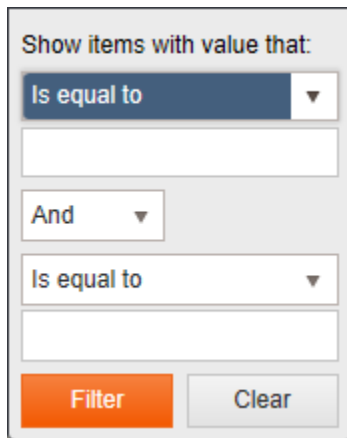
10. Click the **OK** button to close the information dialog.
11. Click the **Close** button to close the open record.
12. Click the **Close** button to close the Audit Denial Tracking System window.

**To end the appeals process at the most recent step:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The software will open the audit denial record to the most recent level in the appeals process.

- **To search a particular column:**

1. Click the blue filter icon  to the right of the name of the column whose data you want to search. A filter dialog will appear.




The image shows a filter dialog box with the following elements:

- Title: "Show items with value that:"
- Operator 1: "Is equal to" (dropdown menu)
- Input field 1: An empty text box for the search value.
- Operator 2: "And" (dropdown menu)
- Operator 3: "Is equal to" (dropdown menu)
- Input field 2: An empty text box for the search value.
- Buttons: "Filter" (orange) and "Clear" (grey).

2. Use the fields in this dialog to configure the criteria the software will use to find matching records.
3. Click the **Filter** button.

- **To clear the search results for a filtered column:**

1. Click the white filter icon  that appears to the right of the column whose data you filtered on. A filter dialog will appear.
2. Click the **Clear** button.

6. Select the **End the appeals process at this point** checkbox.
7. Click the **Save** button. An information dialog will appear.
8. Click the **OK** button to close the information dialog.

9. Click the **Close** button to close the open record.
10. Click the **Close** button to close the Audit Denial Tracking System window.

As part of this module, you can create custom lists of facility contacts and reasons for denial decisions. This task is typically performed only as needed rather than every time you access the module. The instructions below explain how to edit both lists.

**To edit the list of facility contacts:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.
5. Click any link in the **Patient ID** column. The software will open the audit denial record.
6. Click the **List** button to the right of the Facility Contact Person for This Level of Appeal drop-down field. The ADTS – Facility Contact Person dialog will appear.
7. Make any necessary changes to the contact list.
  - **To add a contact:**
    1. Enter the name of the contact in the **Real Name** field.
    2. Click the **Save** button. An information dialog will appear.
    3. Click the **OK** button to close the information dialog.
  - **To delete a contact:**
    1. Select the radio button in the **Select** column that corresponds to the contact name you want to delete.
    2. Click the **Delete Item** button. A confirmation dialog will appear.
    3. Click the **Yes** button to confirm your selection and close the confirmation dialog. After the software deletes the contact, an information dialog will appear.
    4. Click the **OK** button to close the information dialog.

You cannot delete a contact that is currently being used by any audit denial record.

8. Click the **Close** button to close the ADTS – Facility Contact Person dialog.
9. Click the **Close** button to close the open audit denial record.
10. Click the **Close** button to close the Audit Denial Tracking System window.

The list of contacts is not tab-specific. Contacts created in one tab apply to all tabs and records for the selected facility.

**To edit the list of reasons for decisions supplied by a requester:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.

3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.
5. Click any link in the **Patient ID** column. The software will open the audit denial record.
6. Click the **List** button to the right of the Reason for Decision Supplied by Requester checklist. The ADTS – Reason for Decision Supplied by Requester dialog will appear.
7. Make any necessary changes to the list.
  - **To add a reason to the list:**
    1. Enter a code for the reason in the **List Item Code** field.
    2. Enter a description for the reason in the **List Item** field.
    3. Click the **Save** button. An information dialog will appear.
    4. Click the **OK** button to close the information dialog.
  - **To delete a reason from the list:**
    1. Select the radio button in the **Select** column that corresponds to the reason you want to delete.
    2. Click the **Delete Item** button. A confirmation dialog will appear.
    3. Click the **Yes** button to confirm your selection and close the confirmation dialog. After the software deletes the reason, an information dialog will appear.
    4. Click the **OK** button to close the information dialog.
8. Click the **Close** button to close the ADTS – Reason for Decision Supplied by Requester dialog.
9. Click the **Close** button to close the open audit denial record.
10. Click the **Close** button to close the Audit Denial Tracking System window.

You cannot delete a reason that is currently being used by any audit denial record.

The list of reasons is not tab-specific. Reasons created in one tab apply to all tabs and records for the selected facility.

### Tabs and fields

Each tab in an open audit denial record has a number of different fields. The following list includes information about the fields, grouped by tab.

#### Documentation (ADR)

Field #	Field Name	Description
120	Request Made By <sup>‡</sup>	The entity that made the initial request

<sup>‡</sup> This is a required field.

Field #	Field Name	Description
121	FI/RAC	The name of the fiscal intermediary, Medicare administrative contractor, or recovery audit contractor that made the initial request
122	Audit Type	The type of audit, whether LCD, probe, pre-payment, post-payment, or other
123	Request Letter Date <sup>‡</sup>	The date of the request letter
124	Days to Respond <sup>‡</sup>	The number of days given to the facility to respond (typically 30 or 45)
125	Due Date <sup>‡</sup>	The date on which the facility's response is due to the requester (calculated by the software from the Request Letter Date field and the Days to Respond field or entered manually)
126	Facility Reminder Due Date	A user-entered field that determines when the software will begin reminding the user of the due date
127	Date of Payment Reduction	The date on which the payment reduction will take effect
128	Date Response Submitted	The date on which the facility submitted the response
129	Facility Contact Person for This Payment Denial	The name of the contact person for this record's appeal level at your facility
130	Date of Response Letter	The date of the letter announcing the requester's response
131	Outcome of the Response	The requester's response (denied or approved)
132	Reason for Decision Supplied by Requester	The reason or reasons for the requester's decision, chosen from a list of checkboxes (not available if the outcome of the response is favorable)
133	Claim Amount	The amount of the initial claim
134	Amount Denied	The amount denied by the requester
135	Final Reimbursement	The final reimbursement amount (valid only if the appeal has ended)
136	End the appeal process at this point	A checkbox used to terminate the appeals process for the open record

**Redetermination (Appeal)**

Field #	Field Name	Description
130	Date of Previous Response	The date of the response from the ADR, as recorded in field 130 on the Documentation (ADR) tab
137	Days to Appeal <sup>‡</sup>	The number of days given to the facility to appeal the previous decision (typically 120)
138	Due Date <sup>‡</sup>	The date the appeal request is due (calculated by the software or entered manually)

Field #	Field Name	Description
139	Facility Reminder Due Date	A user-entered field that determines when the software will begin reminding the user of the due date for the appeal
140	Date Appeal Submitted	The date on which the facility submitted the appeal
141	Facility Contact Person for This Level of Appeal	The name of the contact person for this record's appeal level at your facility
142	Date of Response Letter	The date of the letter announcing the deciding entity's decision
143	Outcome of the Response	The deciding entity's response (denied or approved)
144	Reason for Decision Supplied by Requester	The reason or reasons for the decision, chosen from a list of checkboxes (not available if the outcome of the decision is favorable)
145	Claim Amount	The amount of the claim, carried forward from field 133 on the Documentation (ADR) tab
146	Amount Denied	The amount of the claim denied
147	Final Reimbursement	The final reimbursement amount (valid only if the appeal has ended)
148	End the appeal process at this point	A checkbox used to terminate the appeals process for the open record

**Reconsideration (QIC)**

Field #	Field Name	Description
149	QIC Section	The qualified independent contractor (QIC) that will handle this appeal
142	Date of Previous Response	The date of the redetermination response, as recorded in field 142 on the Redetermination (Appeal) tab
150	Days to Appeal <sup>‡</sup>	The number of days given to the facility to appeal the previous decision (typically 180)
151	Due Date <sup>‡</sup>	The date the appeal request is due (calculated by the software or entered manually)
152	Facility Reminder Due Date	A user-entered field that determines when the software will begin reminding the user of the due date for the appeal
153	Date Appeal Submitted	The date on which the facility submitted the appeal
154	Facility Contact Person for This Level of Appeal	The name of the contact person for this record's appeal level at your facility
155	Date of Response Letter	The date of the letter announcing the QIC's decision
156	Outcome of the Response	The QIC's response (denied or approved)
157	Reason for Decision Supplied by Requester	The reason or reasons for the QIC's decision, chosen from a list of checkboxes (not available if the outcome of the decision is favorable)

Field #	Field Name	Description
158	Claim Amount	The amount of the claim, carried forward from field 145 on the Redetermination (Appeal) tab
159	Amount Denied	The amount of the claim denied
160	Final Reimbursement	The final reimbursement amount (valid only if the appeal has ended)
161	End the appeal process at this point	A checkbox used to terminate the appeals process for the open record

**Hearing Request (ALJ)**

Field #	Field Name	Description
162	ALJ Section	The OMHA office that will handle this hearing
155	Date of Previous Response	The date of the QIC's response, as recorded in field 155 on the Reconsideration (QIC) tab
163	Days to Appeal <sup>‡</sup>	The number of days given to the facility to request an ALJ hearing (typically 60)
164	Due Date <sup>‡</sup>	The date the hearing request is due (calculated by the software or entered manually)
165	Facility Reminder Due Date	A user-entered field that determines when the software will begin reminding the user of the due date for the hearing
166	Date Appeal Submitted	The date on which the facility submitted the request for a hearing
167A	Hearing Date	The date of the ALJ hearing
167B	Hearing Request Denied	A checkbox used to indicate that the request for a hearing was denied
168	Type of Hearing	The type of hearing approved (remote or in person)
169	Facility Contact Person for This Level of Appeal	The name of the contact person for this record's appeal level at your facility
170	Date of Response Letter	The date of the letter announcing the ALJ's decision
171	Outcome of the Response	The ALJ's decision (denied or approved)
172	Reason for Decision Supplied by Requester	The reason or reasons for the ALJ's decision, chosen from a list of checkboxes (not available if the outcome of the decision is favorable)
173	Claim Amount	The amount of the claim, carried forward from field 158 on the Reconsideration (QIC) tab
174	Amount Denied	The amount of the claim denied
175	Final Reimbursement	The final reimbursement amount (valid only if the appeal has ended)
176	End the appeal process at this point	A checkbox used to terminate the appeals process for the open record



**Departmental Appeals Board (DAB)**

Field #	Field Name	Description
177	Case Number	The case number of the appeal with the Departmental Appeals Board
170	Date of Previous Response	The date of the ALJ's decision, as recorded in field 170 on the Hearing Request (ALJ) tab
178	Days to Appeal <sup>‡</sup>	The number of days given to the facility to appeal the ALJ's decision (typically 60)
179	Due Date <sup>‡</sup>	The date the request for review is due (calculated by the software or entered manually)
180	Facility Reminder Due Date	A user-entered field that determines when the software will begin reminding the user of the due date for the request for review
181	Date Appeal Submitted	The date on which the facility submitted the request for a review
182A	Hearing Date	The date of the DAB hearing
182B	Hearing Request Denied	A checkbox used to indicate that the request for a hearing was denied
183	Type of Hearing	The type of hearing approved (remote or in person)
184	Facility Contact Person for This Level of Appeal	The name of the contact person for this record's appeal level at your facility
185	Date of Response Letter	The date of the letter announcing the DAB's decision
186	Outcome of the Response	The DAB's decision (denied or approved)
187	Reason for Decision Supplied by Requester	The reason or reasons for the DAB's decision, chosen from a list of checkboxes (not available if the ALJ decision is overturned)
188	Claim Amount	The amount of the claim, carried forward from field 173 on the Hearing Request (ALJ) tab
189	Amount Denied	The amount of the claim denied
190	Final Reimbursement	The final reimbursement amount (valid only if the appeal has ended)
191	End the appeal process at this point	A checkbox used to terminate the appeals process for the open record

**Federal District Court (FDC)**

Field #	Field Name	Description
192	Court	The court that will hear the request for review
193	Case Number	The case number provided to the facility
185	Date of Previous Response	The date of the Departmental Appeals Board's decision, as recorded in field 185 on the Departmental Appeals Board (DAB) tab

Field #	Field Name	Description
194	Days to Appeal <sup>‡</sup>	The number of days given to the facility to appeal the DAB's decision (typically 60)
195	Due Date <sup>‡</sup>	The date the request for review is due (calculated by the software or entered manually)
196	Facility Reminder Due Date	A user-entered field that determines when the software will begin reminding the user of the due date for the request for review
197	Date Appeal Submitted	The date on which the facility submitted the request for a review
198A	Hearing Date	The date of the FDC hearing
198B	Hearing Request Denied	A checkbox used to indicate that the request for a hearing was denied
199	Facility Contact Person for This Level of Appeal	The name of the contact person for this record's appeal level at your facility
200	Date of Response Letter	The date of the letter announcing the FDC's decision
201	Outcome of the Response	The FDC's decision (denied or approved)
202	Reason for Decision Supplied by Requester	The reason or reasons for the FDC's decision, chosen from a list of checkboxes (not available if the appeals council decision is overturned)
203	Claim Amount	The amount of the claim, carried forward from field 188 on the Departmental Appeals Board (DAB) tab
204	Amount Denied	The amount of the claim denied
205	Final Reimbursement	The final reimbursement amount (valid only if the appeal has ended)
206	End the appeal process at this point	A checkbox used to terminate the appeals process for the open record

## Deleting audit denial records

The Audit Denial Tracking System window contains a list of all audit denial records for your facility. You can use the UDS-PROi<sup>®</sup> software to delete audit denial records from the UDS-PROi<sup>®</sup> database.

### To delete an audit denial record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central<sup>™</sup> page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.
5. Select the checkbox in the **Select** column that corresponds to the record you want to delete.
6. Click the **Remove Appeal** button. A confirmation dialog will appear.
7. Click the **Yes** button close the confirmation dialog and delete the record. An information dialog will appear.
8. Click the **OK** button to close the information dialog. The deleted record will disappear from the display window.
9. Click the **Close** button to close the Audit Denial Tracking System window.

## Generating the Audit Denial Tracking Form

The Audit Denial Tracking System window contains a list of all audit denial records for your facility. You can use the UDS-PROi® software to view and print the Audit Denial Tracking Form, which presents a formatted version of an audit denial record.

### To generate the report from the audit denial listing:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.
5. Select the checkbox in the **Select** column that corresponds to each record you want to report on.
6. Click the **Print Report** button. The Audit Denial Print Report dialog will appear.
7. Select one or more audit denial steps from the **Audit Denial Step** drop-down field.
  - To generate the report for all audit steps, including future steps that have not yet been activated, select **All Audit Denial Levels**.
  - To generate the report for all audit steps up to each record's most recent audit level, select **Up to the Current Audit Level**.
  - To generate the report for the most recent audit step only, select **Current Audit Level Only**.
8. Click the **Generate** button. The Report Type dialog will appear.
9. Select a file format from the drop-down field. Five formats are available:
  - Adobe® Acrobat® (PDF file)
  - Microsoft® Excel
  - Microsoft® Word
  - Comma-separated value (CSV)
  - XML
10. Click the **OK** button. The Audit Denial Tracking Form will open in a new window.

### To generate the report from an open audit denial record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Audit Denial Tracking System** button. The Audit Denial Tracking System window will appear.

5. Click the link in the **Patient ID** column that corresponds to the record you want to report on. The software will open the audit denial record.
6. Click the **Print Report** button. The Audit Denial Print Report dialog will appear.
7. Select one or more audit denial steps from the **Audit Denial Step** drop-down field.
  - To generate the report for all audit steps, including future steps that have not yet been activated, select **All Audit Denial Levels**.
  - To generate the report for all audit steps up to the record's most recent audit level, select **Up to the Current Audit Level**.
  - To generate the report for the most recent audit step only, select **Current Audit Level Only**.
8. Click the **Generate** button.
9. Select a file format from the drop-down field. Five formats are available:
  - Adobe<sup>®</sup> Acrobat<sup>®</sup> (PDF file)
  - Microsoft<sup>®</sup> Excel
  - Microsoft<sup>®</sup> Word
  - Comma-separated value (CSV)
  - XML
10. Click the **OK** button. The Audit Denial Tracking Form will open in a new window.

**To print a generated report:**

1. Click the print icon. A printer dialog will appear.
2. Configure your printer options.
3. Click the **Print** button.

**To save a generated report:**

1. Click the save icon. The Save As dialog will appear.
2. Select a folder on your network.
3. Enter a name for the exported report file in the **File name** field.
4. Select an export format from the **Save as type** drop-down field.
5. Click the **Save** button. An information dialog will appear.
6. Click the **OK** button to close the information dialog.

**To close a generated report:**

1. Click the **X** in the upper right corner of the report window.
2. Click the **Close** button to close the Audit Denial Print Report dialog.

3. Click the **Close** button to close the Audit Denial Tracking System window.

If you generated the Audit Denial Tracking Form from an open audit denial record, click the **Close** button to close the open record, and then click the **Close** button to close the Audit Denial Tracking System window.

# **Working with Demographic Profiles**

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## **About demographic profiles**

A demographic profile contains information related to nine patient characteristics:

1. Social Security number
2. Name
3. Birth date
4. Gender
5. Medicare number
6. Medicaid number
7. Ethnicity
8. Zip code
9. Marital status

You can import demographic profiles for a particular facility into the UDS-PROi<sup>®</sup> software. Once you have imported the profiles, you can insert them into new and existing preadmission and case records for the selected facility.

## Importing demographic profiles into the UDS-PROi® software

A demographic profile contains information related to a particular set of patient characteristics. You can import patient demographic information from an external file into the UDS-PROi® software for a specific facility, after which any user with the proper privileges and facility access can insert the individual demographic profiles into both preadmission and case records. This feature can help your facility streamline data entry and minimize data entry error, particularly for returning patients. By placing all patient demographic information into an ever-expanding profile, you can guarantee that a particular patient's demographic information is always accurate.

Before you import any demographic information, you must format the import file so that it conforms to UDS-PROi® standards for data layout. The software reads these files in a comma-space delimited (TXT or CSV) format. To access the file specifications, log in to the UDSPRO Central™ website, click the **Subscriber Tools** button, click the **Software** button, click the **Documents** button, and then click the **Demographic Import File Specifications** PDF icon.

### To import demographic profiles into the UDS-PROi® software:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Demographic Import** button. The Demographic Import window will appear.
5. Click the **Select File** button. The Choose File to Upload dialog will appear.
6. Navigate to the drive and directory that contains your import file.
7. Click once on the file you want to import.
8. Click the **Open** button. The Choose File to Upload dialog will close, the software will preprocess the file, and the name of the file will appear in the Demographic Import area.
9. Click the **Import** button. The Import Demographics Error Report dialog will appear.
  - **To print the report:**
    1. Click the **Print** button. The Print dialog will appear.
    2. Configure your printer options.
    3. Click the **Print** button.
  - **To save the report:**
    1. Click the **Save to File** button. The Download dialog will appear.
    2. Click the **Download** button.
    3. Save the file to your network.
    4. Click the **Close** button to close the Download dialog.
10. Click the **Close** button to close the Import Demographics Error Report dialog.
11. Click the **Close** button to close the Demographic Import window.



## Inserting demographic profiles into preadmission records

A demographic profile contains information related to a particular set of patient characteristics. You can import patient demographic information from an external file into the UDS-PROi<sup>®</sup> software for a specific facility, after which any user with the proper privileges and facility access can insert the individual demographic profiles into new and existing preadmission records. This feature can help your facility streamline data entry and minimize data entry error, particularly for returning patients. By placing all patient demographic information into an ever-expanding profile, you can guarantee that a particular patient's demographic information is always accurate.

### To insert a demographic profile into a new preadmission record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click the **Add** button. The Pre-admission Patient Information window will appear.
6. Click the **Demographics** button in the Identification Information area. The Demographics Insert dialog will appear.
7. Select the radio button in the **Select** column that corresponds to the demographic profile you want to import.
8. Click the **Insert/Update Information** button. The Demographics Insert dialog will close, and the information contained in the selected profile will be populated to the open preadmission record.

### To insert a demographic profile into an existing preadmission record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click the link in the **First Name** column that corresponds to the record you want to edit. The Pre-admission Information window will appear.
6. Click the **Demographics** button in the Identification Information area. The Demographics Insert dialog will appear.
7. Select the radio button in the **Select** column that corresponds to the demographic profile you want to import.
8. Click the **Insert/Update Information** button. The Demographics Insert dialog will close, and the information contained in the selected profile will be populated to the open preadmission record.

After you insert the demographic profile for a patient, make any necessary changes to the preadmission record and then save the case.

## Inserting demographic profiles into case records

A demographic profile contains information related to a particular set of patient characteristics. You can import patient demographic information from an external file into the UDS-PROi<sup>®</sup> software for a specific facility, after which any user with the proper privileges and facility access can insert the individual demographic profiles into new and existing case records. This feature can help your facility streamline data entry and minimize data entry error, particularly for returning patients. By placing all patient demographic information into an ever-expanding profile, you can guarantee that a particular patient's demographic information is always accurate.

### To insert a demographic profile into a new case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the **Add** button. The Patient Assessment Information window will appear.
6. Click the **Demographics** button in the Identification Information area. The Demographics Insert dialog will appear.
7. Select the radio button in the **Select** column that corresponds to the demographic profile you want to import.
8. Click the **Insert/Update Information** button. The Demographics Insert dialog will close, and the information contained in the selected profile will be populated to the open case record.

### To insert a demographic profile into an existing case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The Patient Assessment Information window will appear.
6. Click the **Demographics** button in the Identification Information area. The Demographics Insert dialog will appear.
7. Select the radio button in the **Select** column that corresponds to the demographic profile you want to import.
8. Click the **Insert/Update Information** button. The Demographics Insert dialog will close, and the information contained in the selected profile will be populated to the open case record.

After you insert the demographic profile for a patient, make any necessary changes to the case record and then save the case.

## **Working with ICD-10 Codes**

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### **About ICD-10 codes**

For patients admitted or discharged on or after October 1, 2015, CMS requires ICD-10 codes for etiologic diagnosis codes and comorbid conditions. You can use the UDS-PROi<sup>®</sup> software to select ICD-10 codes for preadmission records and case records.

For patients discharged before October 1, 2015, the software will allow you to select ICD-9 codes, not ICD-10 codes. For clinical assistance with ICD-9 codes, contact UDSMR's clinical support department at 716-817-7844.

## Selecting etiologic diagnosis codes for preadmission records

The UDS-PROi® software allows you to select up to three etiologic diagnosis codes for a preadmission record.

For patients discharged before October 1, 2015, the software will allow you to select only one etiologic diagnosis code, and the code will be an ICD-9 code rather than an ICD-10 code. For clinical assistance with ICD-9 codes, contact UDSMR's clinical support department at 716-817-7844.

### To select etiologic diagnosis codes for a preadmission record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-admission Listing** button. The Pre-admission Listing window will appear.
5. Click the link in the **First Name** column that corresponds to the record you want to edit. The preadmission record will open to the Patient Info tab.
6. Click the **Diagnosis** tab.
7. Click the **Suggested ICD Codes** button. The ICD Codes Selection Form dialog will appear.
8. Use the area at the top of the dialog to filter the list of ICD codes, and then click the **Search** button to display the results.
  - To restrict the list to ICD codes from a particular tier, select a tier (A, B, C, D, or A†) from the **Tier** drop-down field. (The † character indicates a code that requires one or more additional codes to qualify as a B, C, or D tier.)
  - To restrict the list to ICD codes that begin with a particular string of characters, enter a code string in the **Code** field. If you enter A, for example, only codes that begin with A will appear in the list; if you then add a 0, only codes that begin with A0 will appear.
  - To restrict the list to ICD codes whose descriptions contain a particular string of characters, enter a search string in the **Description** field. If you enter B, for example, only codes whose descriptions contain the letter B will appear in the list; if you then enter R, only codes whose descriptions contain the letters BR in sequence will appear.
  - To restrict the list to ICD codes that are compliant with the 60% rule, select **Pass** from the **60% Rule Presumptive** drop-down field. To restrict the search results to codes that are compliant with the 60% rule when combined with other codes, select **(Possible)†** instead. (The † character indicates a code that requires one or more additional codes to be compliant with the 60% rule.) To restrict the search results to MMT fracture codes that are compliant with the 60% rule when combined with other codes, select **MMT codes** instead.
  - To restrict the list to ICD codes typically used with the selected impairment group code, select the **Only show suggested codes for <IGC>** checkbox.
  - To filter the list even further, combine these options.

9. Select the radio button in the **Select** column that corresponds to the code you want to select. (If you want to select additional codes from the Additional Codes for Tier area and the Additional Codes for Compliance area, use the checkboxes provided.)
  - **If you want to select a combination of MMT fracture codes:**
    1. Select the radio button in the **Select** column that corresponds to the MMT fracture code you want to select. The Additional Codes for Compliance area on the right side of the dialog will be replaced by a new area that includes the Add MMT Codes button.
    2. Click the **Add MMT Codes** button. The MMT Fracture Codes Selection Form dialog will appear.
    3. Use the area at the top of the dialog to search codes by fracture code type (left lower extremity, right lower extremity, upper extremity, or ribs and sternum), code, description, or a combination thereof.
    4. Use the checkboxes in the **Select** column to select the desired code or codes.
    5. Click the **Select** button to close the MMT Fracture Codes Selection Form dialog and return to the ICD Codes Selection Form dialog, which you can use to add any selected codes to the case.
10. Click the **Select** button to select the highlighted code.
11. Click the **Close** button to close the ICD Codes Selection Form dialog.
12. Click the **Save** button to save the case. After the case has been saved, an information dialog will appear.
13. Click the **OK** button to close the information dialog.
14. Click the **Close** button to close the preadmission record.
15. Click the **Close** button to close the Pre-Admission Listing window.

## Selecting etiologic diagnosis codes for case records

The UDS-PROi® software allows you to select up to three etiologic diagnosis codes for a case record.

For patients discharged before October 1, 2015, the software will allow you to select only one etiologic diagnosis code, and the code will be an ICD-9 code rather than an ICD-10 code. For clinical assistance with ICD-9 codes, contact UDSMR's clinical support department at 716-817-7844.

### To select etiologic diagnosis codes for a case record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The case record will open to the Identification tab.
6. Click the **Admission** tab.
7. Click the **Suggested ICD Codes** button. The ICD Codes Selection Form dialog will appear.
8. Use the area at the top of the dialog to filter the list of ICD codes, and then click the **Search** button to display the results.
  - To restrict the list to ICD codes from a particular tier, select a tier (A, B, C, D, or A†) from the **Tier** drop-down field. (The † character indicates a code that requires one or more additional codes to qualify as a B, C, or D tier.)
  - To restrict the list to ICD codes that begin with a particular string of characters, enter a code string in the **Code** field. If you enter A, for example, only codes that begin with A will appear in the list; if you then add a 0, only codes that begin with A0 will appear.
  - To restrict the list to ICD codes whose descriptions contain a particular string of characters, enter a search string in the **Description** field. If you enter B, for example, only codes whose descriptions contain the letter B will appear in the list; if you then enter R, only codes whose descriptions contain the letters BR in sequence will appear.
  - To restrict the list to ICD codes that are compliant with the 60% rule, select **Pass** from the **60% Rule Presumptive** drop-down field. To restrict the search results to codes that are compliant with the 60% rule when combined with other codes, select **(Possible)†** instead. (The † character indicates a code that requires one or more additional codes to be compliant with the 60% rule.) To restrict the search results to MMT fracture codes that are compliant with the 60% rule when combined with other codes, select **MMT codes** instead.
  - To restrict the list to ICD codes typically used with the selected impairment group code, select the **Only show suggested codes for <IGC>** checkbox.
  - To filter the list even further, combine these options.

9. Select the radio button in the **Select** column that corresponds to the code you want to select. (If you want to select additional codes from the Additional Codes for Tier area and the Additional Codes for Compliance area, use the checkboxes provided.)
  - **If you want to select a combination of MMT fracture codes:**
    1. Select the radio button in the **Select** column that corresponds to the MMT fracture code you want to select. The Additional Codes for Compliance area on the right side of the dialog will be replaced by a new area that includes the Add MMT Codes button.
    2. Click the **Add MMT Codes** button. The MMT Fracture Codes Selection Form dialog will appear.
    3. Use the area at the top of the dialog to search codes by fracture code type (left lower extremity, right lower extremity, upper extremity, or ribs and sternum), code, description, or a combination thereof.
    4. Use the checkboxes in the **Select** column to select the desired code or codes.
    5. Click the **Select** button to close the MMT Fracture Codes Selection Form dialog and return to the ICD Codes Selection Form dialog, which you can use to add any selected codes to the case.
10. Click the **Select** button to select the highlighted code.
11. Click the **Close** button to close the ICD Codes Selection Form dialog.
12. Click the **Save** button to save the case. After the case has been saved, an information dialog will appear.
13. Click the **OK** button to close the information dialog.
14. Click the **Close** button to close the case record.
15. Click the **Close** button to close the Case Listing window.

## Selecting comorbid conditions for preadmission records

The UDS-PROi® software allows you to select up to four ICD-10 codes as comorbid conditions for a preadmission record.

For patients discharged before October 1, 2015, the software will only allow you to select ICD-9 codes, not ICD-10 codes.

### To select comorbid conditions for a preadmission record:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-Admission Listing** button. The Pre-Admission Listing window will appear.
5. Click the link in the **First Name** column that corresponds to the record you want to edit. The preadmission record will open to the Patient Info tab.
6. Click the **Diagnosis** tab.
7. Click the **ICD Codes** button. The ICD Codes Selection Form dialog will appear.
8. Use the area at the top of the dialog to filter the list of ICD codes, and then click the **Search** button to display the results.
  - To restrict the list to ICD codes from a particular tier, select a tier (A, B, C, D, or A†) from the **Tier** drop-down field. (The † character indicates a code that requires one or more additional codes to qualify as a B, C, or D tier.)
  - To restrict the list to ICD codes that begin with a particular string of characters, enter a code string in the **Code** field. If you enter A, for example, only codes that begin with A will appear in the list; if you then add a 0, only codes that begin with A0 will appear.
  - To restrict the list to ICD codes whose descriptions contain a particular string of characters, enter a search string in the **Description** field. If you enter B, for example, only codes whose descriptions contain the letter B will appear in the list; if you then enter R, only codes whose descriptions contain the letters BR in sequence will appear.
  - To restrict the list to ICD codes that are compliant with the 60% rule, select **Pass** from the **60% Rule Presumptive** drop-down field. To restrict the search results to codes that are compliant with the 60% rule when combined with other codes, select **(Possible)†** instead. (The † character indicates a code that requires one or more additional codes to be compliant with the 60% rule.) To restrict the search results to MMT fracture codes that are compliant with the 60% rule when combined with other codes, select **MMT codes** instead.
  - To filter the list even further, combine these options.



9. Select the radio button in the **Select** column that corresponds to the code you want to select. (If you want to select additional codes from the Additional Codes for Tier area and the Additional Codes for Compliance area, use the checkboxes provided.)
  - **If you want to select a combination of MMT fracture codes:**
    1. Select the radio button in the **Select** column that corresponds to the MMT fracture code you want to select. The Additional Codes for Compliance area on the right side of the dialog will be replaced by a new area that includes the Add MMT Codes button.
    2. Click the **Add MMT Codes** button. The MMT Fracture Codes Selection Form dialog will appear.
    3. Use the area at the top of the dialog to search codes by fracture code type (left lower extremity, right lower extremity, upper extremity, or ribs and sternum), code, description, or a combination thereof.
    4. Use the checkboxes in the **Select** column to select the desired code or codes.
    5. Click the **Select** button to close the MMT Fracture Codes Selection Form dialog and return to the ICD Codes Selection Form dialog, which you can use to add any selected codes to the case.
10. Click the **Select** button to record the selected code or codes.
 

If no fields are available, the software will not record the selected code, and a warning dialog will appear. Click the **OK** button to close the warning window.
11. Repeat steps 8–10 to select additional codes.
12. When you are finished selecting codes, click the **Close** button to close the ICD Codes Selection Form dialog. The selected codes will appear in the next available fields for field 72.
13. Click the **Save** button to save the case. After the case has been saved, an information dialog will appear.
14. Click the **OK** button to close the information dialog.
15. Click the **Close** button to close the preadmission record.
16. Click the **Close** button to close the Pre-Admission Listing window.

**To validate selected ICD codes:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Pre-Admission Listing** button. The Pre-Admission Listing window will appear.
5. Click the link in the **First Name** column that corresponds to the record you want to edit. The preadmission record will open to the Patient Info tab.
6. Click the **Diagnosis** tab.

7. Click the **Validate** button. Each code that does not match an entry in the UDS-PROi® database will appear in yellow.
8. Verify the codes flagged as invalid codes.
9. Make any necessary changes to the invalid codes.
10. Click the **Save** button to save the case. After the case has been saved, an information dialog will appear.
11. Click the **OK** button to close the information dialog.
12. Click the **Close** button to close the preadmission record.
13. Click the **Close** button to close the Pre-Admission Listing window.

A yellow flag does not necessarily indicate an invalid code—it could mean that your software’s list of codes is out of date. Don’t panic when you see a yellow field, but **do** take the time to double-check the highlighted ICD code.

## Selecting comorbid conditions for case records

The UDS-PROi® software allows you to select up to fifty-five comorbid conditions for a case record. You can record up to twenty-five such conditions in item 24 on the IRF-PAI, and you can record an additional thirty comorbid conditions for the case. You can use the software to prioritize these conditions, in which case the software will automatically select the twenty-five highest-paying conditions for a case and transfer those codes to item 24 if necessary.

For patients discharged before October 1, 2015, the software will allow you to select only one codes for item 24, and the codes will be ICD-9 codes rather than ICD-10 codes. For clinical assistance with ICD-9 codes, contact UDSMR's clinical support department at 716-817-7844.

### To select ICD codes for item 24:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The case record will open to the Identification tab.
6. Click the **Admission** tab.
7. Click the **ICD Codes** button. The ICD Codes Selection Form dialog will appear.
8. Use the area at the top of the dialog to filter the list of ICD codes, and then click the **Search** button to display the results.
  - To restrict the list to ICD codes from a particular tier, select a tier (A, B, C, D, or A†) from the **Tier** drop-down field. (The † character indicates a code that requires one or more additional codes to qualify as a B, C, or D tier.)
  - To restrict the list to ICD codes that begin with a particular string of characters, enter a code string in the **Code** field. If you enter A, for example, only codes that begin with A will appear in the list; if you then add a 0, only codes that begin with A0 will appear.
  - To restrict the list to ICD codes whose descriptions contain a particular string of characters, enter a search string in the **Description** field. If you enter B, for example, only codes whose descriptions contain the letter B will appear in the list; if you then enter R, only codes whose descriptions contain the letters BR in sequence will appear.
  - To restrict the list to ICD codes that are compliant with the 60% rule, select **Pass** from the **60% Rule Presumptive** drop-down field. To restrict the search results to codes that are compliant with the 60% rule when combined with other codes, select **(Possible)†** instead. (The † character indicates a code that requires one or more additional codes to be compliant with the 60% rule.) To restrict the search results to MMT fracture codes that are compliant with the 60% rule when combined with other codes, select **MMT codes** instead.
  - To filter the list even further, combine these options.

9. Select the radio button in the **Select** column that corresponds to the code you want to select. (If you want to select additional codes from the Additional Codes for Tier area and the Additional Codes for Compliance area, use the checkboxes provided.)
  - **If you want to select a combination of MMT fracture codes:**
    1. Select the radio button in the **Select** column that corresponds to the MMT fracture code you want to select. The Additional Codes for Compliance area on the right side of the dialog will be replaced by a new area that includes the Add MMT Codes button.
    2. Click the **Add MMT Codes** button. The MMT Fracture Codes Selection Form dialog will appear.
    3. Use the area at the top of the dialog to search codes by fracture code type (left lower extremity, right lower extremity, upper extremity, or ribs and sternum), code, description, or a combination thereof.
    4. Use the checkboxes in the **Select** column to select the desired code or codes.
    5. Click the **Select** button to close the MMT Fracture Codes Selection Form dialog and return to the ICD Codes Selection Form dialog, which you can use to add any selected codes to the case.
10. Click the **Select** button to record the selected code or codes.

If no fields are available, the software will not record the selected code, and a warning dialog will appear. Click the **OK** button to close the warning window.

11. Repeat steps 8–10 to add additional codes to the fields in item 24.
12. When you are finished selecting codes, click the **Close** button to close the ICD Codes Selection Form dialog. The selected codes will appear in the next available fields for item 24.
13. Click the **Save** button to save the case. After the case has been saved, an information dialog will appear.
14. Click the **OK** button to close the information dialog.
15. Click the **Close** button to close the case record.
16. Click the **Close** button to close the Case Listing window.

You can use the UDS-PROi<sup>®</sup> software to record up to thirty additional codes. To record additional codes, click the **Advanced** button. Instructions for using this feature appear below.

#### To select additional ICD codes:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
1. Click the **Data Management** button.
2. Click the **Forms** button.
3. Click the **Case Listing** button. The Case Listing window will appear.
4. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The case record will open to the Identification tab.

5. Click the **Admission** tab.
6. Click the **Advanced** button. The Advanced Comorbid Conditions dialog will appear. It will display each code's tier and its compliance status.
7. Click the **ICD Codes** button. The ICD Codes Selection Form dialog will appear.
8. Use the area at the top of the dialog to filter the list of ICD codes, and then click the **Search** button to display the results.
  - To restrict the list to ICD codes from a particular tier, select a tier (A, B, C, D, or A†) from the **Tier** drop-down field. (The † character indicates a code that requires one or more additional codes to qualify as a B, C, or D tier.)
  - To restrict the list to ICD codes that begin with a particular string of characters, enter a code string in the **Code** field. If you enter A, for example, only codes that begin with A will appear in the list; if you then add a 0, only codes that begin with A0 will appear.
  - To restrict the list to ICD codes whose descriptions contain a particular string of characters, enter a search string in the **Description** field. If you enter B, for example, only codes whose descriptions contain the letter B will appear in the list; if you then enter R, only codes whose descriptions contain the letters BR in sequence will appear.
  - To restrict the list to ICD codes that are compliant with the 60% rule, select **Pass** from the **60% Rule Presumptive** drop-down field. To restrict the search results to codes that are compliant with the 60% rule when combined with other codes, select **(Possible)†** instead. (The † character indicates a code that requires one or more additional codes to be compliant with the 60% rule.) To restrict the search results to MMT fracture codes that are compliant with the 60% rule when combined with other codes, select **MMT codes** instead.
  - To filter the list even further, combine these options.
9. Select the radio button in the **Select** column that corresponds to the code you want to select. (If you want to select additional codes from the Additional Codes for Tier area and the Additional Codes for Compliance area, use the checkboxes provided.)
  - **If you want to select a combination of MMT fracture codes:**
    1. Select the radio button in the **Select** column that corresponds to the MMT fracture code you want to select. The Additional Codes for Compliance area on the right side of the dialog will be replaced by a new area that includes the Add MMT Codes button.
    2. Click the **Add MMT Codes** button. The MMT Fracture Codes Selection Form dialog will appear.
    3. Use the area at the top of the dialog to search codes by fracture code type (left lower extremity, right lower extremity, upper extremity, or ribs and sternum), code, description, or a combination thereof.
    4. Use the checkboxes in the **Select** column to select the desired code or codes.

5. Click the **Select** button to close the MMT Fracture Codes Selection Form dialog and return to the ICD Codes Selection Form dialog, which you can use to add any selected codes to the case.
10. Click the **Select** button to record the selected codes.
 

If no fields are available, the software will not record the selected code, and a warning dialog will appear. Click the **OK** button to close the warning window.
11. Repeat steps 9–11 to add additional codes.
12. When you are finished, click the **Close** button to close the ICD Codes Selection Form dialog.
13. Click the **Accept** button to close the Advanced Comorbid Conditions dialog.
14. Click the **Save** button to save the case. After the case has been saved, an information dialog will appear.
15. Click the **OK** button to close the information dialog.
16. Click the **Close** button to close the case record.
17. Click the **Close** button to close the Case Listing window.

**To validate selected ICD codes:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **Case Listing** button. The Case Listing window will appear.
5. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The case record will open to the Identification tab.
6. Click the **Admission** tab.
7. Click the **Validate** button. Each code that does not match an entry in the UDS-PROi® database will appear in yellow.
  - **To validate additional codes not on display:**
    1. Click the **Advanced** button. The Advanced Comorbid Conditions dialog will appear. It will display each code's tier and its compliance status.
    2. Click the dialog's **Validate** button.
    3. Verify the codes flagged as invalid codes.
    4. Make any necessary changes to the invalid codes.
    5. Click the **Accept** button to close the Advanced Comorbid Conditions dialog.
    6. Skip steps 8 and 9 below, and proceed to step 10.
8. Verify the codes flagged as invalid codes.
9. Make any necessary changes to the invalid codes.

10. Click the **Save** button to save the case. After the case has been saved, an information dialog will appear.
11. Click the **OK** button to close the information dialog.
12. Click the **Close** button to close the case record.
13. Click the **Close** button to close the Case Listing window.

A yellow flag does not necessarily indicate an invalid code—it could mean that your software’s list of codes is out of date. Don’t panic when you see a yellow field, but **do** take the time to double-check the highlighted ICD code.

#### **To prioritize comorbid conditions:**

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
1. Click the **Data Management** button.
2. Click the **Forms** button.
3. Click the **Case Listing** button. The Case Listing window will appear.
4. Click the link in the **Patient ID** column that corresponds to the record you want to edit. The case record will open to the Identification tab.
5. Click the **Admission** tab.
6. Click the **Advanced** button. The Advanced Comorbid Conditions dialog will appear.
7. Click the **Prioritize** button. The software will automatically sort the twenty-five highest-paying comorbid conditions for the case into fields 24A to 24Y.
8. Click the **Accept** button to close the Advanced Comorbid Conditions dialog. The prioritized codes will replace the codes in fields 24A to 24Y.
9. Click the **Save** button to save the case. After the case has been saved, an information dialog will appear.
10. Click the **OK** button to close the information dialog.
11. Click the **Close** button to close the case record.
12. Click the **Close** button to close the Case Listing window.

The prioritization feature will streamline your data entry for ICD code fields, but your staff should keep the relevant IRF PPS requirements in mind when using this feature. For rules regarding comorbid conditions, refer to *The IRF-PAI Training Manual*. Also, please note that the prioritization feature sorts first on tier, then on presumptive eligibility compliance for the 60% rule; you should be familiar with the presumptively compliant codes identified by the 60% rule and should make sure that those codes appear in the twenty-five fields assigned to each case. For a list of presumptively qualifying codes, visit [www.cms.gov](http://www.cms.gov).

## Using Calculators

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### Using the BMI Calculator

The UDS-PROi<sup>®</sup> software includes a BMI calculator, which you can use to calculate a patient's body mass index (BMI). This figure is especially helpful when you are considering whether to assign a patient a comorbid condition for morbid obesity.

#### To use the BMI calculator:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **BMI Calculator** button. The BMI Calculator dialog will appear.
5. Select the patient's height in feet and inches from the **Feet** and **Inches** drop-down fields, respectively.
6. Enter the patient's weight in pounds in the **Weight** field.
7. Click the **Calculate** link. The patient's BMI will appear in the BMI field.
8. Click the **Close Window** link to close the BMI Calculator dialog.



## Using the FPP Calculator

The UDS-PROi<sup>®</sup> software includes a Federal Prospective Payment (FPP) calculator. This module uses your CMS-specific facility information to create an expected payment for a particular CMG.

Before using the FPP calculator, you must create at least one PPS record for your facility in the Facility Setup module. If you have not created any PPS records, you will be unable to use the FPP calculator. If your facility's PPS information changes, you can use the Facility Setup module to change the FPPs for records at your facility.

### To calculate an FPP for a CMG at your facility:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Forms** button.
4. Click the **FPP Calculator** button. The FPP Calculator window will appear.
5. Select a facility code from the **Facility** drop-down field in the FPP Calculator window.
6. Enter the CMG for which you want payment information in the **CMG** field.
7. Click the **Calculate FPP** button. The total adjusted FPP value will appear, indicating the amount of reimbursement your facility can expect to receive from CMS for the indicated CMG.

If you have supplied incorrect PPS information for your facility, the Total Adjusted FPP field will be inaccurate. Verify your information with CMS before you use the FPP calculator. UDSMR cannot verify this information for you.

8. Click the **Close** button to close the FPP Calculator window.

# Importing Data

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## Importing preadmission listing data

The preadmission record import module allows you to accomplish the following tasks:

1. Load preadmission data from an external file into the UDS-PROi® software.
2. View record errors and warnings for imported records.
3. Import loaded preadmission data directly into your UDS-PROi® preadmission listing.

This feature is especially useful if you use third-party software to collect data (e.g., preadmission data) that you want to import into the UDS-PROi® software. It is also useful if you employ a hybrid installation of the UDS-PRO® desktop-based software and the UDS-PROi® software.

Before you import preadmission listing data, you must format the import file so that it conforms to UDS-PROi® standards for data layout. The software reads files in a comma-space delimited (TXT or CSV) format. To access the file specifications, log in to the UDSPRO Central™ website, click the **Subscriber Tools** button, click the **Software** button, click the **Documents** button, and then click the **Pre-Admission Case File Specifications** PDF icon.

### To import preadmission listing data:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Database** button.
4. Click the **Import** button.
5. Click the **Pre-admission Listing Records** button. The Import Data – Pre-admission Listing Records window will appear.
6. Select a facility code from the **Facility** drop-down field.
7. Click the **Select File** button. The Choose File to Upload dialog will appear.
8. Navigate to the drive and directory that contains your import file.
9. Click once on the file you want to import.
10. Click the **Open** button. The Choose File to Upload dialog will close, and the name of the selected file will appear in the Import File Information area.
11. Click the **Pre-process** button. The UDS-PROi® software will begin validating the contents of the import file. When the process is complete, the preadmission records contained in the file will appear in the grid.
12. Generate the Pre-admission Import Error Report, which displays any errors or warnings in the loaded preadmission records. Examples include a field that exceeds its allowed length and a numeric field (such as Social Security Number) that contains nondigit characters.
  - **To generate the report:**
    1. Click the **Run Import Reports** button. The Import Report Selection dialog will appear.

2. Select a report (**Import Detail Report** or **Import Summary Report**) from the radio buttons. The *Pre-admission Import Detail Report* contains specific information on each record that is in error. The *Pre-admission Import Summary Report* contains information on the number of errors and warning for the loaded preadmission records.
  3. Click the **OK** button. The Pre-admission Import Error Report dialog will appear.
  - **To print a generated report:**
    1. Click the **Print** button. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **Print** button.
  - **To save a generated report:**
    1. Click the **Save to File** button The Download dialog will appear.
    2. Click the **Download** button.
    3. Save the file to your network.
    4. Click the **Close** button to close the Download dialog.
  - **To close a generated report:**
    1. Click the **Close** button to close the Pre-admission Import Error Report dialog.
    2. Click the **Cancel** button to close the Import Report Selection dialog.
13. Select the records you want to import.
- To select a single record, select the checkbox in the leftmost column that corresponds to the record you want to import.
  - To select multiple records, use the checkboxes in the leftmost column to select the records you want to import.
  - To select all records, select the checkbox at the top of the leftmost column.
14. Select or clear the **Ignore Record Change Date** checkbox.
- To overwrite data in existing records with matching data from duplicate records, select the **Ignore Record Change Date** checkbox in the Import Data Parameters area. Doing so will cause the software to overwrite data in a duplicate record even if the information contained in the stored record is newer than the data in the imported record.
  - To prevent the software from overwriting data in existing record with data from duplicate records, clear the **Ignore Record Change Date** checkbox in the Import Data Parameters area. Doing so will prevent you from replacing more recent data with older data for a duplicate record.
15. Click the **Import** button. The record of each successfully imported preadmission record will change to **IMPORTED**, and an information will appear, indicating the results of the import

process. This window indicates the number of cases selected for import, imported, and failed, both for the current process and since you last preprocessed an import file.

**Important!** Any attempt to import a preadmission record with a Duplicate Case Status of Yes will fail if the preadmission record in the database has already been admitted to a facility. In addition, if you select more than fifty records to import, your job will not be processed immediately; instead, it will be scheduled for off-peak hours, and a scheduling dialog will appear instead of the information dialog. Click the **OK** button to close the scheduling dialog, enter your email address in the next dialog that appears, and then click the **OK** button. The Import Data – Pre-admission Listing window will close, and the Import Schedule window will appear.

16. Click the **OK** button to close the information dialog.
17. Click the **Close** button to close the Import Data – Pre-admission Listing Records window.

## Importing case listing data

The case record import module allows you to accomplish the following tasks:

1. Load case data from an external file into the UDS-PROi® software.
2. View record errors and warnings for imported records.
3. Import loaded case data directly into your UDS-PROi® case listing.

This feature is especially useful if you use third-party software to collect data (e.g., follow-up data) that you want to import into the UDS-PROi® software. It is also useful if you employ a hybrid installation of the UDS-PRO® desktop-based software and the UDS-PROi® software.

Before you import case listing data, you must format the import file so that it conforms to UDS-PROi® standards for data layout. The software accepts TXT and CSV files in a comma-space delimited format, XML files, and ZIP files containing multiple XML files. To access the file specifications, log in to the UDSPRO Central™ website, click the **Subscriber Tools** button, click the **Software** button, click the **Documents** button, and then click the **Comprehensive Case/Assessment File Specifications** PDF icon.

### To import case listing data:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Database** button.
4. Click the **Import** button.
5. Click the **Case Listing Records** button. The Import Data – Case Listing Records window will appear.
6. Select a facility code from the **Facility** drop-down field.
7. Click the **Select File** button. The Choose File to Upload dialog will appear.
8. Navigate to the drive and directory that contains your import file.
9. Click once on the file you want to import.
10. Click the **Open** button. The Choose File to Upload dialog will close, and the name of the selected file will appear in the Import File Information area.
11. Preprocess the file.
  - To preprocess all the data in the file, click the **Pre-process** button. The UDS-PROi® software will begin validating the contents of the import file. When the process is complete, the case records contained in the file will appear in the grid.
  - To preprocess only the follow-up data in the file, click the **Pre-process (Follow-up data only)** button. The UDS-PROi® software will begin validating the contents of the follow-up data in the import file. When the process is complete, the case records contained in the file will appear in the grid, and a number of options will be selected in the Import Data Parameters area.

12. Generate the Case Listing Import Error Report, which displays any errors or warnings in the loaded case records. Examples include a field that exceeds its allowed length and a numeric field (such as Social Security Number) that contains nondigit characters.

- **To generate the report:**

1. Click the **Run Import Reports** button. The Import Report Selection dialog will appear.
2. Select a report (**Import Detail Report** or **Import Summary Report**) from the radio buttons. The *Case Listing Import Detail Report* contains specific information on each record that is in error. The *Case Listing Import Summary Report* contains information on the number of errors and warning for the loaded case records.
3. Click the **OK** button. The Case Listing Import Error Report dialog will appear.

- **To print a generated report:**

1. Click the **Print** button. A printer dialog will appear.
2. Configure your printer options.
3. Click the **Print** button.

- **To save a generated report:**

1. Click the **Save to File** button The Download dialog will appear.
2. Click the **Download** button.
3. Save the file to your network.
4. Click the **Close** button to close the Download dialog.

- **To close a generated report:**

1. Click the **Close** button to close the Case Listing Import Error Report dialog.
2. Click the **Cancel** button to close the Import Report Selection dialog.

13. Select the records you want to import.

- To select a single record, select the checkbox in the leftmost column that corresponds to the record you want to import.
- To select multiple records, use the checkboxes in the leftmost column to select the records you want to import.
- To select all records, select the checkbox at the top of the leftmost column.

14. Select the assessments you want to import from the Import Data Parameters area.

If you clicked the Pre-process (Follow-up data only) button, the Follow-up checkbox will be selected, and you will be unable to change any of the checkboxes in this area.

- To import preadmission assessments, select the **Pre-admission** checkbox.
- To import admission assessments, select the **Admission** checkbox.
- To import interim assessments, select the **Interim** checkbox.

- To import discharge assessments, select the **Discharge** checkbox.
- To import follow-up assessments, select the **Follow-up** checkbox.

15. Select or clear the **Update Patient Case Data** checkbox in the Import Data Parameters area.

If you clicked the Pre-process (Follow-up data only) button, this checkbox will be cleared, and you will be unable to change it.

- To include patient case data (such as Social Security number) with the imported records, select the **Update Patient Case Data** checkbox. For a full list of case data fields, consult the patient table listing in the comprehensive case/assessment file specifications.
- To omit patient case data from the imported records, clear the **Update Patient Case Data** checkbox.

16. Select or clear the **Update Locked Records** checkbox in the Import Data Parameters area.

- To overwrite information in locked case records, select the **Update Locked Records** checkbox.

Be very careful when using this option! If you select this checkbox, imported data will overwrite existing data in any locked case record with a Duplicate Case of Yes. You will lose the original information contained in each overwritten record.

- To prevent the software from changing information in locked case records, clear the **Update Locked Records** checkbox.

17. Select or clear the **Ignore Record Change Date** checkbox in the Import Data Parameters area.

If you clicked the Pre-process (Follow-up data only) button, this checkbox will be selected, and you will be unable to change it.

- To overwrite data in existing records with matching data from duplicate records, select the **Ignore Record Change Date** checkbox in the Import Data Parameters area. Doing so will cause the software to overwrite data in a duplicate record even if the information contained in the stored record is newer than the data in the imported record.
- To prevent the software from overwriting data in existing record with data from duplicate records, clear the **Ignore Record Change Date** checkbox in the Import Data Parameters area. Doing so will prevent you from replacing more recent data with older data for a duplicate record.

18. Select or clear the **Import Therapy Info Data** checkbox in the Import Data Parameters area.

- To include therapy data with the imported records, select the **Import Therapy Info Data** checkbox. For a full list of therapy data fields, consult the therapy table listing in the comprehensive case/assessment file specifications.
- To omit therapy data from the imported records, clear the **Import Therapy Info Data** checkbox.

19. Click the **Import** button. The record of each successfully imported case record will change to IMPORTED, and an information will appear, indicating the results of the import process.

This window indicates the number of cases selected for import, imported, and failed, both for the current process and since you last preprocessed an import file.

If you select more than fifty records to import, your job will not be processed immediately; instead, it will be scheduled for off-peak hours, and a scheduling dialog will appear instead of the information dialog. Click the **OK** button to close the scheduling dialog, enter your email address in the next dialog that appears, and then click the **OK** button. The Import Data – Case Listing window will close, and the Import Schedule window will appear.

20. Click the **OK** button to close the information dialog.
21. Click the **Close** button to close the Import Data – Case Listing Records window.



## Importing patient satisfaction survey data

The patient satisfaction survey record import module allows you to accomplish the following tasks:

1. Load patient satisfaction survey data from an external file into the UDS-PROi® software.
2. View record errors and warnings for imported records.
3. Import loaded patient satisfaction survey data directly into your UDS-PROi® case listing.

This feature is especially useful if you use third-party software to collect data that you want to import into the UDS-PROi® software. It is also useful if you employ a hybrid installation of the UDS-PRO® desktop-based software and the UDS-PROi® software.

Before you import patient satisfaction survey data, you must format the import file so that it conforms to UDS-PROi® standards for data layout. The software reads files in a comma-space delimited (TXT or CSV) format. To access the file specifications, log in to the UDSPRO Central™ website, click the **Subscriber Tools** button, click the **Software** button, click the **Documents** button, and then click the **Patient Satisfaction Survey File Specifications PDF** icon.

### To import patient satisfaction survey data:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Database** button.
4. Click the **Import** button.
5. Click the **Patient Satisfaction Survey Records** button. The Import Data – Patient Satisfaction Survey Records window will appear.
6. Select a facility code from the **Facility** drop-down field.
7. Click the **Select File** button. The Choose File to Upload dialog will appear.
8. Navigate to the drive and directory that contains your import file.
9. Click once on the file you want to import.
10. Click the **Open** button. The Choose File to Upload dialog will close, and the name of the file will appear in the Import File Information area.
11. Click the **Pre-process** button. The UDS-PROi® software will begin validating the contents of the import file. When the process is complete, the patient satisfaction survey records contained in the file will appear in the grid.
12. Generate the Patient Satisfaction Survey Records Error Report, which displays any errors or warnings in the loaded patient satisfaction survey records.
  - **To generate the report:**
    1. Click the **Run Import Reports** button. The Import Report Selection dialog will appear.

2. Select a report (**Import Detail Report** or **Import Summary Report**) from the radio buttons. The *Patient Satisfaction Survey Import Detail Report* contains specific information on each record that is in error. The *Patient Satisfaction Survey Import Summary Report* contains information on the number of errors and warning for the loaded patient satisfaction survey records.
  3. Click the **OK** button. The Patient Satisfaction Survey Records Error Report dialog will appear.
    - **To print a generated report:**
      1. Click the **Print** button. A printer dialog will appear.
      2. Configure your printer options.
      3. Click the **Print** button.
    - **To save a generated report:**
      1. Click the **Save to File** button The Download dialog will appear.
      2. Click the **Download** button.
      3. Save the file to your network.
      4. Click the **Close** button to close the Download dialog.
    - **To close a generated report:**
      1. Click the **Close** button to close the Patient Satisfaction Survey Records Error Report dialog.
      2. Click the **Cancel** button to close the Import Report Selection dialog.
13. Select the records you want to import.
- To select a single record, select the checkbox in the leftmost column that corresponds to the record you want to import.
  - To select multiple records, use the checkboxes in the leftmost column to select the records you want to import.
  - To select all records, select the checkbox at the top of the leftmost column.
14. Select or clear the **Update Locked Records** checkbox in the Import Data Parameters area.
- To overwrite information in locked case records, select the **Update Locked Records** checkbox.
- Be very careful when using this option! If you select this checkbox, imported data will overwrite existing data in any locked case record with a Duplicate Case of Yes. You will lose the original information contained in each overwritten record.
- To prevent the software from changing information in locked case records, clear the **Update Locked Records** checkbox.

15. Select or clear the **Ignore Record Change Date** checkbox in the Import Data Parameters area.
  - To overwrite data in existing records with matching data from duplicate records, select the **Ignore Record Change Date** checkbox in the Import Data Parameters area. Doing so will cause the software to overwrite data in a duplicate record even if the information contained in the stored record is newer than the data in the imported record.
  - To prevent the software from overwriting data in existing record with data from duplicate records, clear the **Ignore Record Change Date** checkbox in the Import Data Parameters area. Doing so will prevent you from replacing more recent data with older data for a duplicate record.
16. Click the **Import** button. The record of each successfully imported patient satisfaction survey record will change to IMPORTED, and an information will appear, indicating the results of the import process. This window indicates the number of cases selected for import, imported, and failed, both for the current process and since you last preprocessed an import file.

If you select more than fifty records to import, your job will not be processed immediately—instead, it will be scheduled for off-peak hours, and a scheduling dialog will appear instead of the information dialog. Click the **OK** button to close the scheduling dialog, enter your email address in the next dialog that appears, and then click the **OK** button. The Import Data – Patient Satisfaction Records Listing window will close, and the Import Schedule window will appear.
17. Click the **OK** button to close the information dialog.
18. Click the **Close** button to close the Import Data – Patient Satisfaction Survey Records window.

## Managing scheduled imports

If you select more than fifty records to import, your job will not be processed immediately. Instead, it will be scheduled for off-peak hours so as not to inconvenience other facilities who are using the software. You can view the status of scheduled imports, delete jobs scheduled to be imported, and update the email address used to notify you of the status of your scheduled imports.

### To manage scheduled imports:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Database** button.
4. Click the **Import** button.
5. Click the **Import Schedule** button. The Import Schedule window will appear.
6. Perform your import tasks.
  - To view the status of scheduled imports, select an import status from the **Status** drop-down field. Four status types are available:
    1. **Not Started:** All jobs scheduled but not yet started
    2. **Completed:** All jobs that have been scheduled and imported
    3. **In Process:** All jobs that are currently importing
    4. **All:** All jobs regardless of status
  - **To delete a scheduled import:**
    1. Select the radio button in the **Select** column that corresponds to the job you want to delete.
    2. Click the **Delete Job** button. A confirmation dialog will appear.
    3. Click the **OK** button to delete the job and close the confirmation dialog.
  - **To update an email address:**
    1. Select the radio button in the **Select** column that corresponds to the job you want to edit.
    2. Click the **Update Email** button. The Explorer User Prompt dialog will appear.
    3. Enter the new email address in the text field.
    4. Click the **OK** button to update the email address and close the dialog.
7. Click the **Close** button to close the Import Schedule window.

# Exporting Data

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## Exporting preadmission listing data

You can use the UDS-PROi<sup>®</sup> software to export preadmission listing data to a text file. You can use this file for such tasks as internal quality tracking and third-party software use.

Because the UDS-PROi<sup>®</sup> software exports data in only one format, you will need to format the exported file (by hand or by script) before you can use it in a third-party system.

### To export preadmission listing data:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Database** button.
4. Click the **Export** button.
5. Click the **Pre-admission Listing Records** button. The Export Data – Pre-admission Listing Records window will appear.
6. Select a facility code from the **Facility** drop-down field.
7. Configure the date inclusion criteria.
  - **To specify an assessment date range:**
    1. Select the **Assessment Date Range** checkbox in the Date Criteria area.
    2. Select a starting date and an ending date from the calendar fields.
  - **To specify a projected admission date range:**
    1. Select the **Projected Admission Date Range** checkbox in the Date Criteria area.
    2. Select a starting date and an ending date from the calendar fields.
  - To export all records regardless of dates, clear all checkboxes in the Date Criteria area.
8. Select an impairment group from the **Impairment Group** drop-down field. (To export all records regardless of impairment group, select **All Impairment Groups**.)
9. Click the **Create Export File** button. The Download dialog will appear.
10. Click the **Download** button.
11. Save the file to your network.
12. Click the **Close** button to close the Download dialog.
13. Click the **Close** button to close the Export Data – Pre-admission Listing Records window.

## Exporting case listing data

You can use the UDS-PROi<sup>®</sup> software to export case listing data to a text file. You can use this file for such tasks as internal quality tracking and third-party software use.

Because the UDS-PROi<sup>®</sup> software exports data in only one format, you will need to format the exported file (by hand or by script) before you can use it in a third-party system.

### To export case listing data:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Database** button.
4. Click the **Export** button.
5. Click the **Case Listing Records** button. The Export Data – Case Listing Records window will appear.
6. Select a facility code from the **Facility** drop-down field.
7. Configure the date inclusion criteria for the records you want to export.
  - **To specify an admission date range:**
    1. Select the **Admission Date Range** checkbox in the Date Criteria area.
    2. Select a starting date and an ending date from the calendar fields.
  - **To specify a discharge date range:**
    1. Select the **Discharge Date Range** checkbox in the Date Criteria area.
    2. Select a starting date and an ending date from the calendar fields.
  - To export all records regardless of dates, clear all checkboxes in the Date Criteria area.
8. Select a payment source from the **Payment Source** drop-down field. (To export all records regardless of payment source, select **00 – All Payment Sources**.)
9. Select an *aged cases* option. An *aged case* meets three criteria: (1) the case has been completed, (2) the case has been exported for transmission to CMS **or** is a non-Medicare case, and (3) the case has a UDSMR<sup>®</sup> Status of UDSMR.
  - To include aged cases in the export file, select the **Export Aged Cases** checkbox.
  - To exclude aged cases from the export file, clear the **Export Aged Cases** checkbox.
10. Select a case record export file version from the **Choose File Version** drop-down field.
11. Click the **Create Export File** button. The Download dialog will appear.
12. Click the **Download** button.
13. Save the file to your network.
14. Click the **Close** button to close the Download dialog.
15. Click the **Close** button to close the Export Data – Case Listing Records window.

## Exporting dynamic case listing data

You can dynamically export a facility's case listing data from the UDS-PROi<sup>®</sup> software. A dynamic export allows you to select particular elements for inclusion in your export file. You can then use this file, which contains data elements from selected records in your facility's database, for such tasks as internal quality tracking and third-party software use.

The central feature of the dynamic export module is the *export specification*. Think of the export specification as a template. It establishes the criteria used to select records and to export the file. The included data may change as your database grows, but the export specification itself will not change.

### To export dynamic case listing data:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Database** button.
4. Click the **Export** button.
5. Click the **Case Listing Dynamic Export** button. The Case Listing Dynamic Export window will appear.
6. Select an export specification option.
  - To create a new export specification, select the **Create New Export Specification** radio button.
  - **To import an export specification file:**
    1. Click the **Import Spec** button. The Import Specification dialog will appear.
    2. Click the **Select File** button. The Choose File to Upload dialog will appear.
    3. Navigate to the drive and directory that contains your export specification file.
    4. Click once on the file you want to import.
    5. Click the **Open** button to load the file and close the Choose File to Upload dialog.
    6. Click the **Import** button to import the file. An information dialog will appear.
    7. Click the **OK** button to close the information dialog and the Import Specification dialog.

You can use this option only if you have saved an export specification to an export specification file instead of the UDS-PROi<sup>®</sup> software. This feature allows you to share your export specifications with another facility. Once you have imported the export specification file into the UDS-PROi<sup>®</sup> software, follow the directions below for using an existing export specification.

- **To use an existing export specification:**
  1. Select the **Use Existing Export Specification** radio button.

2. Select an export specification from the drop-down field.

The UDS-PROi<sup>®</sup> software contains a built-in Flattened export specification. This specification appends assessments to the end of the patient record instead of adding separate assessment records to the export file.

- **To delete an existing export specification:**

1. Select the **Use Existing Export Specification** radio button.
2. Select an export specification from the drop-down field.
3. Click the **Remove** button. A confirmation dialog will appear.
4. Click the **Yes** button to delete the export specification and close the confirmation dialog. An information dialog will appear.
5. Click the **OK** button to close the information dialog.

You cannot delete the built-in Flattened export specification.

7. Click the **Next** button to advance to the Table & Fields window.
8. Select the fields and tables you want to export. Although all eleven tables appear in the drop-down field, not all tables can be exported at the same time. You may select any number of fields from a single table for export, however.
  - **To select a field for export:**
    1. Select a table from the drop-down field.
    2. Click once in the Tables and Fields Available display window on the field you want to export.
    3. Click the > button. The selected field will appear in the Fields to Be Exported display window.
  - **To select a table for export:**
    1. Select a table from the drop-down field.
    2. Click the >> button. All the fields in the selected table will appear in the Fields to Be Exported display window.
  - **To deselect a field:**
    1. Click once on the field in the Fields to Be Exported display window.
    2. Click the < button. The selected field will be removed from the Fields to Be Exported display window.
  - To deselect all fields, click the << button. All fields and tables will be removed from the Fields to Be Exported display window.
9. Click the **Next** button to advance to the Apply Filters window.



## 10. Make the necessary changes to the filter.

- **To filter on a single field:**
  1. Select a table from the drop-down field in the Available Fields area.
  2. Click once in the Available Fields display window on the field you want to filter.
  3. Select a logical operator from the drop-down field between the display windows.
  4. Enter one or more values in the fields below the drop-down field.
    - If you selected the IS NULL or IS NOT NULL operator in step 3, you will be unable to enter any values.
    - If you selected a field that has set values associated with it (such as Primary Pay Source), a selection button (...) will appear next to the field. Click the selection button, select the radio button that corresponds to your choice in the Lookup dialog that appears, and then click the **Select** button to close the Lookup dialog.
  5. Click the > button. The selected field and condition will appear in the Conditions display window.
    - **To overwrite a field filter:**
      1. Filter on the field a second time.
      2. Enter a new value for the filtered field.
      3. Click the > button. A confirmation dialog will appear.
      4. Click the **Yes** button to close the confirmation dialog and overwrite the field filter.
    - **To create an OR filter for a field:**
      1. Filter on the field a second time.
      2. Enter an additional value for the filtered field.
      3. Click the > button. A confirmation dialog will appear.
      4. Click the **No** button to close the confirmation dialog and add the condition to the field filter.
- **To delete a field from a filter:**
  1. Select the radio button in the Conditions display window that corresponds to the field you want to delete from the filter.
  2. Click the < button.
- To include aged cases in the export file, select the **Export Aged Cases** checkbox.
- To exclude aged cases from the export file, clear the **Export Aged Cases** checkbox.
- **To save a filter:**
  1. Click the **Add Filter** button. The Filter Name drop-down field will disappear, and the Filter Name field will appear in its place.

2. Enter a name for the filter in the **Filter Name** field.
- To use a previously saved filter, select the filter from the **Filter Name** drop-down field.

Because a filter is saved to the export specification, you must select the export specification that contains the filter if you want to use the filter during a dynamic export. If you do not save the export specification at the end of the dynamic export process, you will be unable to use the filter when you create your next dynamic export file.

- **To delete a saved filter:**
  1. Select a filter from the **Filter Name** drop-down field.
  2. Click the **Delete** button. A confirmation dialog will appear.
  3. Click the **Yes** button to delete the filter and close the confirmation dialog. An information dialog will appear.
  4. Click the **OK** button to close the information dialog.

11. Click the **Next** button to advance to the Other Options window.

12. Select a format for your export file.

- **To select a delimited file format:**
  1. Select the **Delimited** radio button.
  2. Select a field headers option.
    - To include field headers in the first row, select the **First row contains field headers** checkbox.
    - To omit field headers from the export file, clear the **First row contains field headers** checkbox.
  3. Select the character you want to use as a *field delimiter*. A field delimiter separates one field from another in a delimited file.
    - To use commas as field delimiters, select the **Comma** radio button.
    - To use tabs as field delimiters, select the **Tab** radio button.
    - To use semicolons as field delimiters, select the **Semicolon** radio button.
    - To use spaces as field delimiters, select the **Space** radio button.
    - **To use a character that does not match one of these options:**
      1. Select the **Other** radio button.
      2. Enter a character in the **Other** field.
  4. Select a *text qualifier* from the **Text Qualifier** drop-down field. Any string contained within text qualifiers is defined as a field value for the fields included in the dynamic export file.

By default, the file extension of a delimited file is TXT. If you use spaces as field delimiters, we recommend that you clear the **First row contains field headers** checkbox.

Field headers contain spaces that will cause problems in the export file if this checkbox is selected.

- **To select a CSV file format:**

1. Select the **CSV** radio button.
2. Select a *text qualifier* from the **Text Qualifier** drop-down field. Any string contained within text qualifiers is defined as a field value for the fields included in the dynamic export file.

By default, the file extension of a CSV file is CSV. Field headers are automatically included in a CSV file.

- **To select a fixed-width file format:**

1. Select the **Fixed Width** radio button.
  2. Select a field headers option.
    - To include field headers in the first row, select the **First row contains field headers** checkbox.
    - To omit field headers from the export file, clear the **First row contains field headers** checkbox.
  3. Enter a width for each field in the corresponding **Width** field.
  4. Double-click a **Padding** field.
  5. Select a *padding* for each field from the **Padding** drop-down field. Padding defines the placement of blank spaces in a field. If a field five characters wide has a value of A123, right padding will place the fifth (blank) character to the right of A123, but left padding will place the same character to the left.
13. Use the **Move Up** and **Move Down** buttons to arrange the fields as they will appear in your dynamic case listing export file.
- **To move a field up one row (and left in the export file):**
    1. Click once on the field you want to move.
    2. Click the **Move Up** button.
  - **To move a field down one row (and right in the export file):**
    1. Click once on the field you want to move.
    2. Click the **Move Down** button.
14. Define the *sort sequence* for the records in your export file. The sort sequence defines the order in which fields are used to sort the export file record listing. A field with a sort

sequence of 1 takes precedence over a field with a sort sequence of 2, which in turns takes precedence over a field with a sort sequence of 3, and so forth.

- **To define the sort sequence:**
    1. Double-click the **Sort Sequence** field that corresponds to the export field you want to use first in the sort sequence.
    2. Enter **1** in the **Sort Sequence** field.
    3. Repeat steps 1 and 2 for each field you want to use in the sort sequence. You must enter the next-highest number in the Sort Sequence field each time you repeat step 2.
15. Define the sorting method that will be used to sort the records that will be included in your export file. (By default, a field with a numbered Sort Sequence field has a Sort Type of ASC.)
- **To sort a field in ascending order:**
    1. Double-click the **Sort Order** field that corresponds to the field you want to edit.
    2. Select **ASC** from the field's **Sort Order** drop-down field.
  - **To sort a field in descending order:**
    1. Double-click the **Sort Order** field that corresponds to the field you want to edit.
    2. Select **DESC** from the field's **Sort Order** drop-down field.
16. Set the *default value* for any blank fields in your dynamic case listing export file. The default value defines the value used to fill a blank field in the export file. If you enter a default value of Blank Hospital Name for the Facility Description field, any blank Facility Description field will become "Blank Hospital Name" in the export file.
- To enter a default value for a field, enter a value in the corresponding **Default Value** field.
  - **To clear a default value for a field:**
    1. Click once in the **Default Value** field you want to delete.
    2. Press the **Backspace** or **Delete** key on your keyboard.
17. Click the **Next** button to advance to the Preview window.
18. Click the **Preview** button to preview the data that will be included in your export file. The data will be populated to the grid. Records are determined by the fields and filters selected earlier in the export process.
19. If you want to save your export specification, use the features in this window to do so now.
- **To save a new export specification to the UDS-PROi® software:**
    1. Click the **Save Spec** button. The Export Spec dialog will appear.
    2. Enter the name for the export specification in the **Export Specification Name** field.
    3. Click the **OK** button to save the export specification and close the Export Spec dialog. An information dialog will appear.

4. Click the **OK** button to close the information dialog.
- **To update a previously saved export specification and save it to the UDS-PROi® software:**
  1. Click the **Save Spec** button. A confirmation dialog will appear.
  2. Click the **Yes** button to save the changes and close the confirmation dialog. An information dialog will appear.
  3. Click the **OK** button to close the information dialog.

You can modify the built-in Flattened export specification, but you may not save your changes to the Flattened export specification itself. Instead, you must save the changes to a new export specification. The UDS-PROi® software will automatically append the word “flattened” to the name of this modified export specification, making future identification easier.

- **To save a previously saved export specification as a new export specification:**
  1. Click the **Save Spec** button. A confirmation dialog will appear.
  2. Click the **No** button to close the confirmation dialog. The Export Spec dialog will appear.
  3. Enter the name for the export specification in the **Export Specification Name** field.
  4. Click the **OK** button to save the export specification and close the Export Spec dialog. An information dialog will appear.
  5. Click the **OK** button to close the information dialog.
- **To save the export specification to an export specification file:**
  1. Click the **Export Spec** button. After the export specification file is ready, an information dialog will appear.
  2. Click the **OK** button to close the information dialog. A Download dialog will appear.
  3. Click the **Download** button.
  4. Save the file to your network.
  5. Click the **Close** button to close the Download dialog.

You cannot save the export specification to an export specification file until you save the export specification to the UDS-PROi® software. Saving the export specification to an export specification file allows you to share an export specification with another facility or another unit at your facility.

20. Click the **Export** button to create the dynamic export file. After the file is ready for download, the Download dialog will appear.
21. Click the **Download** button.
22. Save the file to your network.
23. Click the **Close** button to close the Download dialog.

24. Click the **Close** button to close the Case Listing Dynamic Export window.

## Exporting patient satisfaction survey data

You can use the UDS-PROi<sup>®</sup> software to export patient satisfaction survey data to a text file. You can use this file for such tasks as internal quality tracking and third-party software use.

Because the UDS-PROi<sup>®</sup> software exports data in only one format, you will need to format the exported file (by hand or by script) before you can use it in a third-party system.

### To export patient satisfaction survey data:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Database** button.
4. Click the **Export** button.
5. Click the **Patient Satisfaction Survey Records** button. The Export Data – Satisfaction Survey Records window will appear.
6. Select a facility code from the **Facility** drop-down field.
7. Configure the date inclusion criteria for the records you want to export.
  - **To specify an admission date range:**
    1. Select the **Admission Date Range** checkbox in the Date Criteria area.
    2. Select a starting date and an ending date from the calendar fields.
  - **To specify a discharge date range:**
    1. Select the **Discharge Date Range** checkbox in the Date Criteria area.
    2. Select a starting date and an ending date from the calendar fields.
  - To export all records regardless of dates, clear all checkboxes in the Date Criteria area.
8. Click the **Create Export File** button. The Download dialog will appear.
9. Click the **Download** button.
10. Save the file to your network.
11. Click the **Close** button to close the Download dialog.
12. Click the **Close** button to close the Export Data – Satisfaction Survey Records window.

## Exporting CMG data

You can export CMG data from the UDS-PROi® software to a text file. You can use this file for such tasks as internal quality tracking and third-party software use.

Because the UDS-PROi® software exports data in only one format, you will need to format the exported file (by hand or by script) before you can use it in a third-party system.

### To export CMG data:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Database** button.
4. Click the **Export** button.
5. Click the **CMG Export** button. The Export Data – CMG Export window will appear.
6. Select a facility code from the **Facility** drop-down field.
7. Configure the date inclusion criteria for the records you want to export.
  - **To specify a CMS export date range:**
    1. Select the **Transmission Date Range** checkbox in the Date Criteria area.
    2. Select a starting date and an ending date from the calendar fields.

The transmission date range applies to each case's CMS Export Date (the date on which the file was prepared for transmission to CMS).
  - **To specify an admission date range:**
    1. Select the **Admission Date Range** checkbox in the Date Criteria area.
    2. Select a starting date and an ending date from the calendar fields.
  - **To specify a discharge date range:**
    1. Select the **Discharge Date Range** checkbox in the Date Criteria area.
    2. Select a starting date and an ending date from the calendar fields.
  - To export all data regardless of dates, clear all checkboxes in the Date Criteria area.
8. Select a CMG export option.
  - To export only cases with associated CMGs, select the **Cases with CMG** checkbox in the Additional Criteria area.
  - To export all cases regardless of CMGs, clear the **Cases with CMG** checkbox in the Additional Criteria area.
9. Select a payment source from the **Payment Source** drop-down field. (To export all records regardless of payment source, select **00 – All Payment Sources**.)
10. Select a CMG export file version from the **Choose File Version** drop-down field.
11. Click the **Download CMG Export** button. The Download dialog will appear.



12. Click the **Download** button.
13. Save the file to your network.
14. Click the **Close** button to close the Download dialog.
15. Click the **Close** button to close the Export Data – CMG Export window.

## Copying patient data for external reporting

You can copy your facility's patient data to a new Microsoft® SQL Server database. The new tables will appear in the SQL directory on the specified server. You can open these tables using an application such as Microsoft® SQL Enterprise Manager and use them in an external reporting tool to generate custom reports for your facility. This feature allows you to run such reports while keeping your original data safe from potential corruption.

### To download your facility's database:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Database** button.
4. Click the **Copy Patient Data** button. The Copy Patient Data window will appear.
5. Click the **Download** button. A confirmation dialog will appear.
6. Click the **OK** button to close the confirmation dialog. The UDS-PROi® software will begin building your database. When the process is complete, the Download dialog will appear.
7. Click the **Download** button.
8. Save the file to your network.
9. Click the **Close** button to close the Download dialog.
10. Click the **Close** button to close the Copy Patient Data window.

### To unzip a downloaded database:

1. Navigate to the drive and directory to which you saved the database file.
2. Double-click the zip file. The file's contents will appear in Windows Explorer.
3. Click the **Extract all files** button in Windows Explorer. The Extract Compressed (Zipped) Folders dialog will appear.
4. Enter a location for the extracted files in the field provided, or click the **Browse** button and select a new location.
5. Select the **Show extracted files when complete** checkbox.
6. Click the **Extract** button.
7. Double-click the ReadMe.txt file and read it.
8. Double-click the **UDSPro\_CopyPatientData\_Setup.vbs** file.

You must already have SQL Server 2008 R2 or later installed on your system to proceed beyond this step. If you do not, you will be unable to access the downloaded database.

9. Follow the prompts to run the SQL scripts in the zip file and extract the database files. For an explanation of the prompts, see the ReadMe.txt file.

# Managing Reports

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## Generating on-demand reports

You can use the UDSPRO Central™ website to generate on-demand reports. These reports contain real-time benchmark data for your region and the nation.

### To generate an on-demand report with default parameters:

1. Click the **Reports** button.
2. Click the **On Demand Reports** button. The On Demand Reports window will appear.
3. Click the **Run a Report** button that appears to the left of the report you want to generate. (The Run a Report button looks like a green arrow.) The report will open in a new window. To change the report's parameters, use the features in the upper area of the window, and then click the **View Report** button.

### To generate an on-demand report with user-selected parameters:

1. Click the **Reports** button.
2. Click the **On Demand Reports** button. The On Demand Reports window will appear.
3. Click the **Run an Advanced Report** button that appears to the left of the report you want to generate. (The Run an Advanced Report button looks like a blue plus sign.) The report details will appear in a new window.
4. Select the parameters you want in the Report Options area. To view and set advanced options, click the **Advanced Options** button.
5. Click the **Run Report** button. The report will open in a new window. To change the report's parameters, use the features in the upper area of the window, and then click the **View Report** button.

Use the icons on the report window to print the report or export it as an Adobe® PDF file or a Microsoft® Excel file. To close a generated report, click the **X** in the upper right corner of the report window.

In addition, you can save an on-demand report as a new report. You can access saved reports quickly and easily by clicking the **Saved Reports** button in the Reports menu. Saving an on-demand report is a good idea if you generate the report often with the same parameters; in that case, you can access the report directly from the Saved Reports module with your parameters preselected rather than hunt for it each time you want to generate it.

### To save an on-demand report:

1. Click the **Reports** button.
2. Click the **On Demand Reports** button. The On Demand Reports window will appear.
3. Click the **Save a Report** button that appears to the left of the report you want to save. (The Save a Report button looks like a floppy disk.) The Modify Report window will appear.
4. Select the parameters you want in the Report Options area. To view and select advanced parameters, click the **Advanced Options** button.

5. Enter a name for the new report in the **Report Title** field.
6. Enter a description for the new report in the **Report Description** field.
7. Set the report's visibility for other users at your facility.
  - To make the saved report visible to all users at your facility, select the **Share** checkbox.
  - To hide the saved report from all users at your facility, clear the **Share** checkbox.
8. Click the **Save Report** button to save the report. An information dialog will appear.
  - To undo your changes, click the **Reset** button instead.
9. Click the **OK** button to close the information dialog.
10. If you want to generate the report now, click the **Run Report** button. The report will open in a new window. Use the icons on the report window to print the report or export it as an Adobe® PDF file or a Microsoft® Excel file. To close a generated report, click the **X** in the upper right corner of the report window.
11. When you are finished, click the **Back** button to return to the On Demand Reports window.

## Generating the Section GG Profile Report for a single patient

You can use the UDS-PROi<sup>®</sup> software to generate the Section GG Profile Report, which displays the section GG quality indicator information for a single patient in a polar graph format. You can print this profile report and export it to a number of different formats.

### To generate the Section GG Profile Report for a single patient:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Reports** button.
3. Click the **Profile Reports** button.
4. Click the **Section GG Profile** button.
5. Click the **Individual** tab.
6. If you want to use a previously saved filter, select it from the **Name** drop-down field.
7. Select a facility code from the **Facility Code** drop-down field. To report on all facilities, select **All**.
8. Enter the text you want to use as a filter in the **Last Name** field. This field searches for a partial match at the beginning of the Last Name field. If you enter *SMI*, for example, each patient whose last name begins with the string *SMI* will appear in the filtered case listing. To include all patients regardless of last name, leave this field blank.
9. Enter the text you want to use as a filter in the **First Name** field. This field searches for a partial match at the beginning of the First Name field. If you enter *JO*, for example, each patient whose first name begins with the string *JO* will appear in the filtered case listing. To include all patients regardless of first name, leave this field blank.
10. Enter the text you want to use as a filter in the **Patient ID** field. This field searches for a partial match at the beginning of the Patient ID field. If you enter *123*, for example, each patient whose identification number begins with the string *123* will appear in the filtered case listing. To include all patients regardless of identification number, leave this field blank.
11. Select an admission date from the **Admit Date** calendar field, or enter it manually. The Admit Date is a single date. If you select *January 1, 2015*, for example, only patients admitted on January 1, 2015, will appear in the filtered case listing. To include all patients regardless of admission date, leave this field blank.
12. Select a discharge date from the **Discharge Date** calendar field, or enter it manually. The Discharge Date is a single date. If you select *December 31, 2015*, for example, only patients discharged on December 31, 2015, will appear in the filtered case listing. To include all patients regardless of discharge date, leave this field blank.
13. Select a payment source from the **Pay Source** drop-down field. To include all patients regardless of payment source, leave this field blank.
14. Click the **Update** button. The filtered case record listing will appear.
  - To clear the currently filtered fields, click the **Clear** button. Doing so will deselect the filter in the Name drop-down field, which will change to display *All Cases*.

15. Select the radio button to the left of the patient record you want to report on.
16. Click the arrow icon that appears to the left of the case record you selected. The patient's assessments will appear below the record.
17. Select the assessments you want to include in the report.
  - **To select an assessment for inclusion in the report:**
    1. Select the checkbox that appears to the left of the assessment (or the goal, if the case has goals).
    2. Double-click the **Color** field in the right-most column to activate its drop-down menu.
    3. Select a color from the drop-down menu.
    4. Repeat steps 1–3 for each assessment you want to include in the report.
18. Customize the header and footer of the report.
  - **To select fields for the report header:**
    1. Click the **Header** button. The Report Header dialog will appear.
    2. Make your selections.
      - **To select a field for inclusion in the header:**
        1. Select a table from the drop-down field.
        2. Click once in the Available Fields display window on the field you want to select.
        3. Click the > button. The selected field will appear in the Selected Fields display window.
        4. Repeat steps 1–3 for each field you want to include in the report header.
      - **To select a table for inclusion in the header:**
        1. Select a table from the drop-down field.
        2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
        3. Repeat steps 1 and 2 for each table you want to include in the report header.
      - **To exclude a selected field:**
        1. Click once on a field in the Selected Fields display window.
        2. Click the < button.
      - To exclude all selected fields, click the << button.
    3. Click the **Select** button.
    - To enter text directly into the report header, type the text directly into the **Header** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report header; any text contained within the parameter indicators will be treated as a

parameter, and the software will insert the parameter's value into the header when the report is generated.

- **To select fields for the report footer:**

1. Click the **Footer** button. The Report Footer dialog will appear.
2. Make your selections.

- **To select a field for inclusion in the footer:**

1. Select a table from the drop-down field.
2. Click once in the Available Fields display window on the field you want to select.
3. Click the > button. The selected field will appear in the Selected Fields display window.
4. Repeat steps 1–3 for each field you want to include in the report footer.

- **To select a table for inclusion in the footer:**

1. Select a table from the drop-down field.
2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
3. Repeat steps 1 and 2 for each table you want to include in the report footer.

- **To exclude a selected field:**

1. Click once on a field in the Selected Fields display window.
2. Click the < button.

- To exclude all selected fields, click the << button.

3. Click the **Select** button.

- To enter text directly into the report footer, type the text directly into the **Footer** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report footer; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the footer when the report is generated.

19. If you want to save your filter, follow the instructions below.

- **To save a new filter:**

1. Click the **New** button. The Filter Name dialog will appear.
2. Enter a name for the filter in the **Filter Name** field.
3. Click the **OK** button to save the filter. The new filter will appear in the Name drop-down field.

Filters are specific to the Individual and Multiple tabs. Filters created and saved in one tab are not available in the other area. Filtered fields, the goal and goal color, and the header and footer fields are all saved with the filter.

- To save a previously saved filter after you have made changes, click the **Save** button in the Filters area.
20. If you saved your filter in the previous step and want to define it as the new default filter for the Individual tab, click the **Default** button in the Filters area, and then click the **OK** button to close the information dialog that appears.
- **To select another filter as the new default filter for the Individual tab:**
    1. Select a filter from the **Name** drop-down field.
    2. Click the **Default** button in the Filters area. An information dialog will appear.
    3. Click the **OK** button to close the information dialog.
- Selecting a filter from the Name drop-down field will cause the UDS-PROi<sup>®</sup> software to apply the filter to the case record database.
21. If you want to export assessment information to a CSV file without generating the report, follow the instructions below. These steps will save you the time the UDS-PROi<sup>®</sup> software needs to process the report. You can use the exported CSV file in a third-party software application for custom reporting and quality control.
- **To export assessment information to a CSV file:**
    1. Click the **Export** button. The Download dialog will appear.
    2. Click the **Download** button.
    3. Save the file to your network.
    4. Click the **Close** button to close the Download dialog.
22. Click the **Generate Report** button. The Report Type dialog will appear.
23. Select a file format from the drop-down field. Five formats are available:
- Adobe<sup>®</sup> Acrobat<sup>®</sup> (PDF file)
  - Microsoft<sup>®</sup> Excel
  - Microsoft<sup>®</sup> Word
  - Comma-separated value (CSV)
  - XML
24. Click the **OK** button.
25. Open the file or save it to a folder on your network.
26. When you are finished, click the **Close** button.



## Generating the Section GG Profile Report for multiple patients

You can use the UDS-PROi<sup>®</sup> software to generate the Section GG Profile Report, which displays the section GG quality indicator information for a single patient in a polar graph format. You can print this profile report and export it to a number of different formats.

### To generate the Section GG Profile Report for multiple patients:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Reports** button.
3. Click the **Profile Reports** button.
4. Click the **Section GG Profile** button.
5. Click the **Multiple** tab.
6. If you want to use a previously saved filter, select it from the **Name** drop-down field.
7. Select a facility code from the **Facility Code** drop-down field. To report on all facilities, select **All**.
8. Configure the impairment filter criteria in the Admission Impairment area.
  - **To select a particular impairment or impairment group:**
    1. Select the **Impairment Groups** radio button.
    2. Make your selections.
      - **To select a particular impairment:**
        1. Select an impairment group from the drop-down field.
        2. Select an impairment from the display window beneath the drop-down field.
        3. Click the > button. The selected impairment will appear in the right-hand display window.
      - **To select all impairments within a particular impairment group:**
        1. Select an impairment group from the drop-down field.
        2. Click the >> button. All impairments within the impairment group will appear in the right-hand display window.
      - **To deselect a particular impairment:**
        1. Click once on the impairment you want to remove from the right-hand display window.
        2. Click the < button. The impairment will disappear from the display window.
      - To deselect all impairments, click the << button.
    - To include all cases regardless of impairment, select the **All Impairments** radio button.

9. Configure the primary date filter criteria.
  - **To filter on a case record's admission date:**
    1. Select **Admit Date** from the **Primary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
  - **To filter on a case record's assessment reference date:**
    1. Select **Admission Assessment Reference Date** from the **Primary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
  - **To filter on a case record's discharge date:**
    1. Select **Discharge Date** from the **Primary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
10. Configure the secondary date filter criteria.
  - **To filter on a case record's admission date:**
    1. Select **Admit Date** from the **Secondary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
  - **To filter on a case record's assessment reference date:**
    1. Select **Admission Assessment Reference Date** from the **Secondary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
  - **To filter on a case record's discharge date:**
    1. Select **Discharge Date** from the **Secondary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
11. Select a payment source from the **Pay Source** drop-down field. To include all patients regardless of payment source, leave this field blank.
12. Configure the error status filter criteria in the Error Status area.
  - To exclude cases with a CMS Status of Error, select the **Exclude CMS Error** checkbox.
  - To include all cases regardless of CMS Status, clear the **Exclude CMS Error** checkbox.
  - To include only cases with complete admission and discharge assessments, select the **Show only records with complete admission and discharge assessments** checkbox.

- To include all cases regardless of the status of their admission and discharge assessments, clear the **Show only records with complete admission and discharge assessments** checkbox.

13. Select the assessments you want to include in the report from the Graph Contents area.

- **To select an assessment:**
  1. Select the checkbox to the left of the assessment (or the goal, for any cases with case-based goals).
  2. Click once on the corresponding **Pick** button in the right-most column. The Color dialog will appear.
  3. Click once on the color you want to use in the report.
  4. Click the **OK** button to select the color and close the Color dialog.
  5. Repeat steps 1–4 for each assessment you want to include in the report.

You can select a maximum of five assessments for inclusion in the Profile Report. The goal counts against this limit.

14. Customize the header and footer of the report.

- **To select fields for the report header:**
  1. Click the **Header** button. The Report Header dialog will appear.
  2. Make your selections.
    - **To select a field for inclusion in the header:**
      1. Select a table from the drop-down field.
      2. Click once in the Available Fields display window on the field you want to select.
      3. Click the > button. The selected field will appear in the Selected Fields display window.
      4. Repeat steps 1–3 for each field you want to include in the report header.
    - **To select a table for inclusion in the header:**
      1. Select a table from the drop-down field.
      2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
      3. Repeat steps 1 and 2 for each table you want to include in the report header.
    - **To exclude a selected field:**
      1. Click once on a field in the Selected Fields display window.
      2. Click the < button.
    - To exclude all selected fields, click the << button.
  3. Click the **Select** button.

- To enter text directly into the report header, type the text directly into the **Header** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report header; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the header when the report is generated.
  - **To select fields for the report footer:**
    1. Click the **Footer** button. The Report Footer dialog will appear.
    2. Make your selections.
      - **To select a field for inclusion in the footer:**
        1. Select a table from the drop-down field.
        2. Click once in the Available Fields display window on the field you want to select.
        3. Click the > button. The selected field will appear in the Selected Fields display window.
        4. Repeat steps 1–3 for each field you want to include in the report footer.
      - **To select a table for inclusion in the footer:**
        1. Select a table from the drop-down field.
        2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
        3. Repeat steps 1 and 2 for each table you want to include in the report footer.
      - **To exclude a selected field:**
        1. Click once on a field in the Selected Fields display window.
        2. Click the < button.
      - To exclude all selected fields, click the << button.
    3. Click the **Select** button.
  - To enter text directly into the report footer, type the text directly into the **Footer** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report footer; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the footer when the report is generated.
15. The filtered case record listing will appear. To clear the currently filtered fields, click the **Clear** button. Doing so will deselect the filter in the Name drop-down field, which will change to display *All Cases*.
16. If you want to save your filter, follow the instructions below.
- **To save a new filter:**
    1. Click the **New** button. The Filter Name dialog will appear.

2. Enter a name for the filter in the **Filter Name** field.
3. Click the **OK** button to save the filter. The new filter will appear in the Name drop-down field.

Filters are specific to the Individual and Multiple tabs. Filters created and saved in one tab are not available in the other area. Filtered fields, the goal and goal color, and the header and footer fields are all saved with the filter.

- To save a previously saved filter after you have made changes, click the **Save** button in the Filters area.
17. If you saved your filter in the previous step and want to define it as the new default filter for the Multiple tab, click the **Default** button in the Filters area, and then click the **OK** button to close the information dialog that appears.
- **To select another filter as the new default filter for the Multiple tab:**
    1. Select a filter from the **Name** drop-down field.
    2. Click the **Default** button in the Filters area. An information dialog will appear.
    3. Click the **OK** button to close the information dialog.

Selecting a filter from the Name drop-down field will cause the UDS-PROi<sup>®</sup> software to apply the filter to the case record database.

18. If you want to export assessment information to a CSV file without generating the Profile Report, follow the instructions below. These steps will save you the time the UDS-PROi<sup>®</sup> software needs to process the report. You can use the exported CSV file in a third-party software application for custom reporting and quality control.
- **To export assessment information to a CSV file:**
    1. Click the **Export** button. The Download dialog will appear.
    2. Click the **Download** button.
    3. Save the file to your network.
    4. Click the **Close** button to close the Download dialog.
19. Click the **Generate Report** button. The Report Type dialog will appear.
20. Select a file format from the drop-down field. Five formats are available:
- Adobe<sup>®</sup> Acrobat<sup>®</sup> (PDF file)
  - Microsoft<sup>®</sup> Excel
  - Microsoft<sup>®</sup> Word
  - Comma-separated value (CSV)
  - XML
21. Click the **OK** button.
22. Open the file or save it to a folder on your network.

23. When you are finished, click the **Close** button to close the Profile Report window.

## Generating the FIM® Profile Report for a single patient

You can use the UDS-PROi® software to generate the FIM® Profile Report, which displays the FIM® instrument information for a single patient in a polar graph format. You can print this profile report and export it to a number of different formats.

### To generate the FIM® Profile Report for a single patient:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Reports** button.
3. Click the **Profile Reports** button.
4. Click the **FIM® Profile** button.
5. Click the **Individual** tab.
6. If you want to use a previously saved filter, select it from the **Name** drop-down field.
7. Select a facility code from the **Facility Code** drop-down field. To report on all facilities, select **All**.
8. Enter the text you want to use as a filter in the **Last Name** field. This field searches for a partial match at the beginning of the Last Name field. If you enter *SMI*, for example, each patient whose last name begins with the string *SMI* will appear in the filtered case listing. To include all patients regardless of last name, leave this field blank.
9. Enter the text you want to use as a filter in the **First Name** field. This field searches for a partial match at the beginning of the First Name field. If you enter *JO*, for example, each patient whose first name begins with the string *JO* will appear in the filtered case listing. To include all patients regardless of first name, leave this field blank.
10. Enter the text you want to use as a filter in the **Patient ID** field. This field searches for a partial match at the beginning of the Patient ID field. If you enter *123*, for example, each patient whose identification number begins with the string *123* will appear in the filtered case listing. To include all patients regardless of identification number, leave this field blank.
11. Select an admission date from the **Admit Date** calendar field, or enter it manually. The Admit Date is a single date. If you select *January 1, 2015*, for example, only patients admitted on January 1, 2015, will appear in the filtered case listing. To include all patients regardless of admission date, leave this field blank.
12. Select a discharge date from the **Discharge Date** calendar field, or enter it manually. The Discharge Date is a single date. If you select *December 31, 2015*, for example, only patients discharged on December 31, 2015, will appear in the filtered case listing. To include all patients regardless of discharge date, leave this field blank.
13. Select a payment source from the **Pay Source** drop-down field. To include all patients regardless of payment source, leave this field blank.
14. Click the **Update** button. The filtered case record listing will appear.
  - To clear the currently filtered fields, click the **Clear** button. Doing so will deselect the filter in the Name drop-down field, which will change to display *All Cases*.

15. Select the radio button to the left of the patient record you want to report on.
16. Click the + icon that appears to the left of the case record you selected. The patient's assessments will appear below the record.
17. Select the assessments you want to include in the report.
  - **To select an assessment for inclusion in the report:**
    1. Select the checkbox that appears to the left of the assessment.
    2. Double-click the **Color** field in the right-most column to activate its drop-down menu.
    3. Select a color from the drop-down menu.
    4. Repeat steps 1–3 for each assessment you want to include in the report.
18. If you want to include a FIM<sup>®</sup> goal in the report, select a goal from the **Goal** drop-down field. Four goals are available:
  - **Case-based goal:** The *case-based goal* is entered by facility staff members in the case record's FIM<sup>®</sup> Instrument tab.
  - **50th percentile RCMG:** The *50th percentile RCMG goal* represents the median values for a particular reporting CMG (i.e., those that equal or exceed 50% of the ratings).
  - **75th percentile RCMG:** The *75th percentile RCMG goal* represents the values that equal or exceed 75% of the ratings for a particular reporting CMG.
  - **90th percentile RCMG:** The *90th percentile RCMG goal* represents the values that equal or exceed 90% of the ratings for a particular reporting CMG.
19. If you selected a goal in the previous step, select the color of the goal as you want it to appear in the report.
  - **To change the goal color:**
    1. Click the **Pick** button. The Color dialog will appear.
    2. Click once on the color you want to use in the report.
    3. Click the **OK** button to close the Color dialog.
20. Customize the header and footer of the report.
  - **To select fields for the report header:**
    1. Click the **Header** button. The Report Header dialog will appear.
    2. Make your selections.
      - **To select a field for inclusion in the header:**
        1. Select a table from the drop-down field.
        2. Click once in the Available Fields display window on the field you want to select.



3. Click the > button. The selected field will appear in the Selected Fields display window.
  4. Repeat steps 1–3 for each field you want to include in the report header.
- **To select a table for inclusion in the header:**
    1. Select a table from the drop-down field.
    2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
    3. Repeat steps 1 and 2 for each table you want to include in the report header.
  - **To exclude a selected field:**
    1. Click once on a field in the Selected Fields display window.
    2. Click the < button.
  - To exclude all selected fields, click the << button.
3. Click the **Select** button.
- To enter text directly into the report header, type the text directly into the **Header** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report header; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the header when the report is generated.
  - **To select fields for the report footer:**
    1. Click the **Footer** button. The Report Footer dialog will appear.
    2. Make your selections.
      - **To select a field for inclusion in the footer:**
        1. Select a table from the drop-down field.
        2. Click once in the Available Fields display window on the field you want to select.
        3. Click the > button. The selected field will appear in the Selected Fields display window.
        4. Repeat steps 1–3 for each field you want to include in the report footer.
      - **To select a table for inclusion in the footer:**
        1. Select a table from the drop-down field.
        2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
        3. Repeat steps 1 and 2 for each table you want to include in the report footer.
      - **To exclude a selected field:**
        1. Click once on a field in the Selected Fields display window.

2. Click the < button.
    - To exclude all selected fields, click the << button.
  3. Click the **Select** button.
    - To enter text directly into the report footer, type the text directly into the **Footer** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report footer; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the footer when the report is generated.
21. If you want to save your filter, follow the instructions below.
- **To save a new filter:**
    1. Click the **New** button. The Filter Name dialog will appear.
    2. Enter a name for the filter in the **Filter Name** field.
    3. Click the **OK** button to save the filter. The new filter will appear in the Name drop-down field.

Filters are specific to the Individual and Multiple tabs. Filters created and saved in one tab are not available in the other area. Filtered fields, the goal and goal color, and the header and footer fields are all saved with the filter.
  - To save a previously saved filter after you have made changes, click the **Save** button in the Filters area.
22. If you saved your filter in the previous step and want to define it as the new default filter for the Individual tab, click the **Default** button in the Filters area, and then click the **OK** button to close the information dialog that appears.
- **To select another filter as the new default filter for the Individual tab:**
    1. Select a filter from the **Name** drop-down field.
    2. Click the **Default** button in the Filters area. An information dialog will appear.
    3. Click the **OK** button to close the information dialog.

Selecting a filter from the Name drop-down field will cause the UDS-PROi<sup>®</sup> software to apply the filter to the case record database.
23. If you want to export assessment information to a CSV file without generating the Profile Report, follow the instructions below. These steps will save you the time the UDS-PROi<sup>®</sup> software needs to process the report. You can use the exported CSV file in a third-party software application for custom reporting and quality control.
- **To export assessment information to a CSV file:**
    1. Click the **Export** button. The Download dialog will appear.
    2. Click the **Download** button.
    3. Save the file to your network.
    4. Click the **Close** button to close the Download dialog.

24. Click the **Generate Report** button. The Report Type dialog will appear.
25. Select a file format from the drop-down field. Five formats are available:
  - Adobe® Acrobat® (PDF file)
  - Microsoft® Excel
  - Microsoft® Word
  - Comma-separated value (CSV)
  - XML
26. Click the **OK** button.
27. Open the file or save it to a folder on your network.
28. When you are finished, click the **Close** button to close the Profile Report window.

## Generating the FIM<sup>®</sup> Profile Report for multiple patients

You can use the UDS-PROi<sup>®</sup> software to generate the FIM<sup>®</sup> Profile Report, which displays the FIM<sup>®</sup> instrument information for multiple patients in a polar graph format. You can print this profile report and export it to a number of different formats.

### To generate the FIM<sup>®</sup> Profile Report for multiple patients:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central<sup>™</sup> page.
2. Click the **Reports** button.
3. Click the **Profile Reports** button.
4. Click the **FIM<sup>®</sup> Profile** button.
5. Click the **Multiple** tab.
6. If you want to use a previously saved filter, select it from the **Name** drop-down field.
7. Select a facility code from the **Facility Code** drop-down field. To report on all facilities, select **All**.
8. Configure the impairment filter criteria in the Admission Impairment area.
  - **To select a particular impairment or impairment group:**
    1. Select the **Impairment Groups** radio button.
    2. Make your selections.
      - **To select a particular impairment:**
        1. Select an impairment group from the drop-down field.
        2. Select an impairment from the display window beneath the drop-down field.
        3. Click the > button. The selected impairment will appear in the right-hand display window.
      - **To select all impairments within a particular impairment group:**
        1. Select an impairment group from the drop-down field.
        2. Click the >> button. All impairments within the impairment group will appear in the right-hand display window.
      - **To deselect a particular impairment:**
        1. Click once on the impairment you want to remove from the right-hand display window.
        2. Click the < button. The impairment will disappear from the display window.
      - To deselect all impairments, click the << button.
    - To include all cases regardless of impairment, select the **All Impairments** radio button.

9. Configure the primary date filter criteria.
  - **To filter on a case record's admission date:**
    1. Select **Admit Date** from the **Primary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
  - **To filter on a case record's assessment reference date:**
    1. Select **Admission Assessments Reference Date** from the **Primary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
  - **To filter on a case record's discharge date:**
    1. Select **Discharge Date** from the **Primary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
10. Configure the secondary date filter criteria.
  - **To filter on a case record's admission date:**
    1. Select **Admit Date** from the **Secondary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
  - **To filter on a case record's assessment reference date:**
    1. Select **Admission Assessments Reference Date** from the **Secondary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
  - **To filter on a case record's discharge date:**
    1. Select **Discharge Date** from the **Secondary Date** drop-down field.
    2. Select a starting date or an ending date (or both) from the **From** and **To** calendar fields.
11. Select a payment source from the **Pay Source** drop-down field. To include all patients regardless of payment source, leave this field blank.
12. Configure the error status filter criteria in the Error Status area.
  - To exclude cases with a CMS Status of Error, select the **Exclude CMS Error** checkbox.
  - To include all cases regardless of CMS Status, clear the **Exclude CMS Error** checkbox.
  - To exclude cases with a UDSMR<sup>®</sup> Status of Error, select the **Exclude UDSMR Error** checkbox.

- To include all cases regardless of UDSMR<sup>®</sup> Status, clear the **Exclude UDSMR Error** checkbox.

13. Select the assessments you want to include in the report from the Graph Contents area.

- **To select an assessment:**
  1. Select the checkbox to the left of the assessment.
  2. Click once on the corresponding **Pick** button in the right-most column. The Color dialog will appear.
  3. Click once on the color you want to use in the report.
  4. Click the **OK** button to select the color and close the Color dialog.
  5. Repeat steps 1–4 for each assessment you want to include in the report.

You can select a maximum of four assessments for inclusion in the Profile Report. The goal does not count against this limit.

14. If you want to include a FIM<sup>®</sup> goal in the report, select a goal from the **Goal** drop-down field. Four goals are available:

- **Case-based goal:** The *case-based goal* is entered by facility staff members in the case record's FIM<sup>®</sup> Instrument tab.
- **50th percentile RCMG:** The *50th percentile RCMG goal* represents the median values for a particular reporting CMG (i.e., those that equal or exceed 50% of the ratings).
- **75th percentile RCMG:** The *75th percentile RCMG goal* represents the values that equal or exceed 75% of the ratings for a particular reporting CMG.
- **90th percentile RCMG:** The *90th percentile RCMG goal* represents the values that equal or exceed 90% of the ratings for a particular reporting CMG.

15. If you selected a goal in the previous step, select the color of the goal as you want it to appear in the report.

- **To change the goal color:**
  1. Click the **Pick** button to the right of the goal color icon. The Color dialog will appear.
  2. Click once on the color you want to use in the report.
  3. Click the **OK** button to close the Color dialog.

16. Customize the header and footer of the report.

- **To select fields for the report header:**
  1. Click the **Header** button. The Report Header dialog will appear.
  2. Make your selections.
    - **To select a field for inclusion in the header:**
      1. Select a table from the drop-down field.

2. Click once in the Available Fields display window on the field you want to select.
  3. Click the > button. The selected field will appear in the Selected Fields display window.
  4. Repeat steps 1–3 for each field you want to include in the report header.
- **To select a table for inclusion in the header:**
    1. Select a table from the drop-down field.
    2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
    3. Repeat steps 1 and 2 for each table you want to include in the report header.
  - **To exclude a selected field:**
    1. Click once on a field in the Selected Fields display window.
    2. Click the < button.
  - To exclude all selected fields, click the << button.
3. Click the **Select** button.
- To enter text directly into the report header, type the text directly into the **Header** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report header; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the header when the report is generated.
- **To select fields for the report footer:**
    1. Click the **Footer** button. The Report Footer dialog will appear.
    2. Make your selections.
      - **To select a field for inclusion in the footer:**
        1. Select a table from the drop-down field.
        2. Click once in the Available Fields display window on the field you want to select.
        3. Click the > button. The selected field will appear in the Selected Fields display window.
        4. Repeat steps 1–3 for each field you want to include in the report footer.
      - **To select a table for inclusion in the footer:**
        1. Select a table from the drop-down field.
        2. Click the >> button. All the fields in the selected table will appear in the Selected Fields display window.
        3. Repeat steps 1 and 2 for each table you want to include in the report footer.

- **To exclude a selected field:**
    1. Click once on a field in the Selected Fields display window.
    2. Click the < button.
  - To exclude all selected fields, click the << button.
  - 3. Click the **Select** button.
  - To enter text directly into the report footer, type the text directly into the **Footer** field. Any text not contained within the parameter indicators << and >> will appear verbatim in the report footer; any text contained within the parameter indicators will be treated as a parameter, and the software will insert the parameter's value into the footer when the report is generated.
17. The filtered case record listing will appear. To clear the currently filtered fields, click the **Clear** button. Doing so will deselect the filter in the Name drop-down field, which will change to display *All Cases*.
18. If you want to save your filter, follow the instructions below.
- **To save a new filter:**
    1. Click the **New** button. The Filter Name dialog will appear.
    2. Enter a name for the filter in the **Filter Name** field.
    3. Click the **OK** button to save the filter. The new filter will appear in the Name drop-down field.
- Filters are specific to the Individual and Multiple tabs. Filters created and saved in one tab are not available in the other area. Filtered fields, the goal and goal color, and the header and footer fields are all saved with the filter.
- To save a previously saved filter after you have made changes, click the **Save** button in the Filters area.
19. If you saved your filter in the previous step and want to define it as the new default filter for the Multiple tab, click the **Default** button in the Filters area, and then click the **OK** button to close the information dialog that appears.
- **To select another filter as the new default filter for the Multiple tab:**
    1. Select a filter from the **Name** drop-down field.
    2. Click the **Default** button in the Filters area. An information dialog will appear.
    3. Click the **OK** button to close the information dialog.
- Selecting a filter from the Name drop-down field will cause the UDS-PROi<sup>®</sup> software to apply the filter to the case record database.
20. If you want to export assessment information to a CSV file without generating the Profile Report, follow the instructions below. These steps will save you the time the UDS-PROi<sup>®</sup>



software needs to process the report. You can use the exported CSV file in a third-party software application for custom reporting and quality control.

- **To export assessment information to a CSV file:**

1. Click the **Export** button. The Download dialog will appear.
2. Click the **Download** button.
3. Save the file to your network.
4. Click the **Close** button to close the Download dialog.

21. Click the **Generate Report** button. The Report Type dialog will appear.

22. Select a file format from the drop-down field. Five formats are available:

- Adobe® Acrobat® (PDF file)
- Microsoft® Excel
- Microsoft® Word
- Comma-separated value (CSV)
- XML

23. Click the **OK** button.

24. Open the file or save it to a folder on your network.

25. When you are finished, click the **Close** button to close the Profile Report window.

## Viewing published reports and report explanation guides

The UDSPRO Central™ website allows you to access several reports published periodically for your facility. You can view these reports and associated report explanation guides as PDF files. These reports include submission reports (also known as “verification reports”) for data collected by UDSMR for aggregation into the national IRF database.

### To view published reports:

1. Click the **Reports** button.
2. Click the **Published Reports (PDF)** button. The Published Reports (PDF) window will appear.
3. Click the **Run a Report** button (which looks like a green arrow) to the left of the report category you want to view. Five categories are available:
  - Quarterly reports
  - Submission reports
  - Special reports
  - Weekly CMG reports
  - Annual UDSMR® program evaluation model (PEM) reports
4. Use the links in the software to access your reports. To switch between report categories, use the links at the top of the page.

### To access the report explanation guides:

1. Click the **Reports** button.
2. Click the **Published Reports (PDF)** button. The Published Reports (PDF) window will appear.
3. Click the **Run a Report** button (which looks like a green arrow) to the left of any report category. The Published Reports window will appear.
4. Click the **Report Guides** tab.
5. Click the PDF icon to the left of the guide you want to view. The guide will open in a separate window.
6. When you are finished, click the **X** in the upper right corner of the guide window to close it.

## Generating the Scheduler Report

You can use the UDS-PROi<sup>®</sup> software to generate the Scheduler Report, which tracks the schedule status of all Medicare case records that have not yet been prepared for transmission from your facility to CMS. Once you have generated the Scheduler Report, you can print it and use it to help plan your caseloads.

**If a record is late to CMS, you will lose 25% of your reimbursement.** An admitted patient record should be encoded by the tenth day after its admission date, counting the date of admission as day 1. Similarly, a discharged patient record should be encoded by the seventh day after its discharge completion date, counting the discharge completion date as day 1; the discharge completion date falls on the fifth day after the case's discharge date, counting the date of discharge as day 1. A discharged patient record must be transmitted to CMS by the seventeenth day after its discharge date, again counting the discharge date as day 1. For examples, see the final rule.

### To generate the Scheduler Report:

1. Click the **Reports** button.
  2. Click the **Scheduler Report** button. The Scheduler Report window will appear.
  3. Select a date filter option in the Report Filter area.
    - To filter on transmission date deadlines, select the **Transmission** radio button.
    - To filter on admission encoding date deadlines, select the **Admission Encode By** radio button.
    - To filter on discharge encoding date deadlines, select the **Discharge Encoding By** radio button.
    - To include all records in your report, select the **All Records** radio button.
  4. Select the time frame options you want to use. (If you selected the All Records radio button in step 3, then the Within Timeframe checkbox and the Overdue Cases checkbox will be selected by default. Select an option from the **Days in Advance** drop-down field in the Report Criteria area. The Scheduler Report will filter on all three deadlines: transmission, admission encoding, and discharge encoding.)
    - **To view a time-limited list of records:**
      1. Select the **Within Timeframe** checkbox in the Report Filter area.
      2. Select an option from the **Days in Advance** drop-down field in the Report Criteria area.
- The time frame counts the current day as day 1. If you run the Scheduler Report on Monday and select 5 from the Days in Advance drop-down field, for example, the Scheduler Report will generate information through Friday rather than Saturday.
- To view a list of overdue records, select the **Overdue Cases** checkbox.
5. Select a facility code from the **Facility Code** drop-down field in the Report Criteria area.

6. Select the case inclusion options you want to use in the Report Criteria area.
  - To view Medicare non-MCO cases, select the **02 – Medicare Fee for Service** checkbox.
  - To view Medicare MCO cases, select the **51 – Medicare—Medicare Advantage** checkbox.
  - To view Medicare non-MCO and Medicare MCO cases, select both the **02 – Medicare Fee for Service** checkbox and the **51 – Medicare—Medicare Advantage** checkbox.
  - To include previously transmitted cases with changed Transmission to CMS Status fields, select the **Include Updated Cases** checkbox. You must retransmit a case to CMS if (1) the case has been previously transmitted and (2) one or more of its CMS-required fields have changed.
  - To include cases with a secondary pay source of Medicare, select the **Include all cases having a Medicare secondary pay source** checkbox.
7. Click the **Generate Report** button. The Scheduler Report will appear in the Cases Selected grid.

To view a printable version of a generated report, click the **View Report** button. The Scheduler Report will appear in a separate window.

**To view a printable version of a generated report:**

1. Click the **View Report** button. The Report Type dialog will appear.
2. Select a file format from the drop-down field. Five formats are available:
  - Adobe® Acrobat® (PDF file)
  - Microsoft® Excel
  - Microsoft® Word
  - Comma-separated value (CSV)
  - XML
3. Click the **OK** button.
4. Open the file or save it to a folder on your network.
5. When you are finished, click the **Close** button to close the Scheduler Report window.

## Generating blank forms

Several blank forms are available in the UDS-PROi<sup>®</sup> software. These forms do not contain patient data. You can generate these forms, print them, and use them at your facility to collect patient data.

You cannot export a blank pre-admit document.

### To generate a blank form:

1. Click the **Reports** button.
2. Click the **Software Reports** button. The Software Reports window will appear. The blank forms will appear in the Blank Forms section at the top of the page.
3. Click the **Run a Report** button that appears to the left of the report you want to generate. (The Run a Report button looks like a green arrow.) The Report Type dialog will appear.
4. Select a file format from the drop-down field. Five formats are available:
  - Adobe<sup>®</sup> Acrobat<sup>®</sup> (PDF file)
  - Microsoft<sup>®</sup> Excel
  - Microsoft<sup>®</sup> Word
  - Comma-separated value (CSV)
  - XML
5. Click the **OK** button.
6. Open the file or save it to a folder on your network.

In addition, you can save a blank form as a new report. You can access saved reports quickly and easily by clicking the **Saved Reports** button in the Reports menu. Saving a blank form is a good idea if you print the form often; in that case, you can access the form directly from the Saved Reports module rather than hunt for it each time you want to generate it.

You cannot save a blank pre-admit document as a new report.

### To save a blank form as a new report:

1. Click the **Reports** button.
2. Click the **Software Reports** button. The Software Reports window will appear. The blank forms will appear in the Blank Forms section at the top of the page.
3. Click the **Save a Report** button that appears to the left of the report you want to save. (The Save a Report button looks like a floppy disk.) The Modify Report window will appear.
4. Enter a name for the new report in the **Report Title** field.
5. Enter a description for the new report in the **Report Description** field.
6. Set the report's visibility for other users at your facility.
  - To make the saved report visible to all users at your facility, select the **Share** checkbox.
  - To hide the saved report from all users at your facility, clear the **Share** checkbox.

7. Click the **Save Report** button to save the report. An information dialog will appear. (To undo your changes, click the **Reset** button instead.)
8. Click the **OK** button to close the information dialog.
9. If you want to generate the report now, click the **Run Report** button. The Report Type dialog will appear.
10. Select a file format from the drop-down field. Five formats are available:
  - Adobe<sup>®</sup> Acrobat<sup>®</sup> (PDF file)
  - Microsoft<sup>®</sup> Excel
  - Microsoft<sup>®</sup> Word
  - Comma-separated value (CSV)
  - XML
11. Click the **OK** button.
12. Open the file or save it to a folder on your network.
13. When you are finished, click the **Back** button to return to the Software Reports window.

## Generating real-time reports

The UDS-PROi<sup>®</sup> software allows you to generate numerous real-time reports for your facility. These reports include up-to-the-minute data from your facility. Three types of reports are available:

1. Follow-up reports
2. Listing reports
3. Summary reports

Many reports are available in each of two categories: user reports and executive reports. Your account's privileges determine which category of reports you can run. (A user account with the proper privileges can generate reports from both categories.)

The UDS-PROi<sup>®</sup> software comes with a large number of real-time reports—too many to describe individually in this guide. By default, however, each real-time report includes an appendix that describes it. If you want more information about a particular report, select the appendix option from the Report Options area, generate the report, and then read the appendix.

### To generate a real-time report:

1. Click the **Reports** button.
2. Click the **Software Reports** button. The Software Reports window will appear. The real-time reports will appear below the blank forms at the top of the page.
3. Click the **Run an Advanced Report** button that appears to the left of the report you want to generate. (The Run an Advanced Report button looks like a blue plus sign.) The Modify Report window will appear.
4. Select the parameters you want in the Report Options area.
5. Click the **Run Report** button. The Report Type dialog will appear.
6. Select a file format from the drop-down field. Five formats are available:
  - Adobe<sup>®</sup> Acrobat<sup>®</sup> (PDF file)
  - Microsoft<sup>®</sup> Excel
  - Microsoft<sup>®</sup> Word
  - Comma-separated value (CSV)
  - XML
7. Click the **OK** button.
8. Open the file or save it to a folder on your network.
9. When you are finished, click the **Back** button to return to the Software Reports window.

In addition, you can save a real-time report as a new report. You can access saved reports quickly and easily by clicking the **Saved Reports** button in the Reports menu. Saving a real-time report is a good idea if you generate the report often with the same parameters; in that case, you

can access the report directly from the Saved Reports module with your parameters preselected rather than hunt for it each time you want to generate it.

**To save a real-time report:**

1. Click the **Reports** button.
2. Click the **Software Reports** button. The Software Reports window will appear. The blank forms will appear in the Blank Forms section at the top of the page.
3. Click the **Save a Report** button that appears to the left of the report you want to save. (The Save a Report button looks like a floppy disk.) The Modify Report window will appear.
4. Select the parameters you want in the Report Options area.
5. Enter a name for the new report in the **Report Title** field.
6. Enter a description for the new report in the **Report Description** field.
7. Set the report's visibility for other users at your facility.
  - To make the saved report visible to all users at your facility, select the **Share** checkbox.
  - To hide the saved report from all users at your facility, clear the **Share** checkbox.
8. Click the **Save Report** button to save the report. An information dialog will appear. (To undo your changes, click the **Reset** button instead.)
9. Click the **OK** button to close the information dialog.
10. If you want to generate the report now, click the **Run Report** button. The Report Type dialog will appear.
11. Select a file format from the drop-down field. Five formats are available:
  - Adobe® Acrobat® (PDF file)
  - Microsoft® Excel
  - Microsoft® Word
  - Comma-separated value (CSV)
  - XML
12. Click the **OK** button.
13. Open the file or save it to a folder on your network.
14. When you are finished, click the **Back** button to return to the Software Reports window.



## Generating saved reports

The UDSPRO Central™ website allows you to save reports to a special section of the site. Doing so allows you to access many frequently run reports from one location and saves you the hassle of selecting the same parameters each time you generate the report.

### To generate a saved report:

1. Click the **Reports** button.
2. Click the **Saved Reports** button. The Saved Reports window will appear.
3. Click the **Run a Report** button that appears to the left of the report you want to generate. (The Run a Report button looks like a green arrow.)

The exact steps for generating the report will vary depending on the report. For more information, read the other topics in this section.

If you want to modify a report before generating it, follow the instructions below.

### To modify a saved report:

1. Click the **Reports** button.
2. Click the **Saved Reports** button. The Saved Reports window will appear.
3. Click the **Modify a Report** button that appears to the left of the report you want to modify. (The Modify a Report button looks like a pencil icon.) The Modify Report window will appear.
4. Select the parameters you want in the Report Options area. To view advanced parameters, click the **Advanced Options** button. (This option is not enabled for all reports.)

If the saved report is a blank form, you cannot set any parameters.

5. Customize the report's title and description.
  - To change the report's title, enter the new title in the **Report Title** field.
  - To change the report's description, enter the new description in the **Report Description** field.
6. Set the report's visibility for other users at your facility.
  - To make the saved report visible to all users at your facility, select the **Share** checkbox.
  - To hide the saved report from all users at your facility, clear the **Share** checkbox.
7. Click the **Update Changes** button to save the report. A confirmation dialog will appear, asking whether you want to save changes to the existing report or to save the changes as a new report.
  - To save changes to the existing report, click the **Yes** button, and then click the **OK** button to close the information dialog that appears.
  - To save the changes as a new report, click the **No** button, and then click the **OK** button to close the information dialog that appears.

8. If you want to generate the report now, click the **Run Report** button.

The exact steps for generating the report will vary depending on the report. For more information, read the other topics in this section.

9. When you are finished, click the **Back** button to return to the Saved Reports window.

If you want to delete a report from your collection of saved reports, follow the instructions below.

**To delete a saved report:**

1. Click the **Reports** button.
2. Click the **Saved Reports** button. The Saved Reports window will appear.
3. Click the **Modify a Report** button that appears to the left of the report you want to delete. (The Modify a Report button looks like a pencil-and-paper icon.) The Modify Report window will appear.
4. Click the **Delete Report** button. A confirmation dialog will appear.
5. Click the **Yes** button to confirm your deletion of the report and close the confirmation dialog. An information dialog will appear.
6. Click the **OK** button to close the information dialog and return to the Saved Reports window.

## Generating recently generated reports

The UDSPRO Central™ website maintains a list of the twenty reports you have most recently generated. You can access these reports quickly from one location, saving you the need to search for each report.

### To generate a recently generated report:

1. Click the **Reports** button.
2. Click the **Most Recent Reports** button. The Most Recent Reports window will appear.
3. Use the available buttons to manage the reports. For detailed instructions on generating, saving, and modifying reports, see the instructions located elsewhere in this section.

In addition, you can save a recently generated report as a new report. You can access saved reports quickly and easily by clicking the **Saved Reports** button in the Reports menu. Saving a report is a good idea if you generate the report often with the same parameters; in that case, you can access the report directly from the Saved Reports module with your parameters preselected rather than hunt for it each time you want to generate it.

### To save a recently generated report:

1. Click the **Reports** button.
2. Click the **Software Reports** button. The Software Reports window will appear. The blank forms will appear in the Blank Forms section at the top of the page.
3. Click the **Save a Report** button that appears to the left of the report you want to save. (The Save a Report button looks like a floppy disk.) The Modify Report window will appear.
4. Select the parameters you want in the Report Options area.
5. Enter a name for the new report in the **Report Title** field.
6. Enter a description for the new report in the **Report Description** field.
7. Set the report's visibility for other users at your facility.
  - To make the saved report visible to all users at your facility, select the **Share** checkbox.
  - To hide the saved report from all users at your facility, clear the **Share** checkbox.
8. Click the **Save Report** button to save the report. An information dialog will appear. (To undo your changes, click the **Reset** button instead.)
9. Click the **OK** button to close the information dialog.
10. If you want to generate the report now, click the **Run Report** button.

The exact steps for generating the report will vary depending on the report. For more information, read the other topics in this section.

11. When you are finished, click the **Back** button to return to the Software Reports window.

## Viewing quarterly breakout information

You can use the UDSPRO Central™ website to view quarterly breakout information for data collected from your facility by UDSMR.

### To view quarterly breakout information:

1. Click the **Reports** button.
2. Click the **Quarterly Breakout** button. The Quarterly Breakout dialog will appear.
3. Review the information in the dialog.
4. When you are finished, click the **X** in the upper right corner of the Quarterly Breakout dialog to close it.

## Using the Report Locator

You can use the Report Locator feature to search the UDSPRO Central™ database for specific reports.

### To search for a report:

1. Click the **Reports** button.
2. Click the **Report Locator** button. The Report Locator window will appear.
3. Enter the keywords you want to search for in the field provided. To view a list of keywords, click the **Report Locator Help** link.
4. Click the **Search** button. A list of reports associated with the supplied keywords will appear.
5. Use the **Run a Report**, **Run an Advanced Report**, and **Save a Report** buttons to access the reports you want.

# Packing and Transmitting Data

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## Preparing CMS export files

You can use the UDS-PROi<sup>®</sup> software to prepare data files for transmission to CMS. These files contain information related to cases with a primary payment source of Medicare MCO or Medicare non-MCO. (You also can select cases with a secondary payment source that matches either type.) You can use these exported files to meet regulatory requirements established by the Centers for Medicare and Medicaid Services.

**Important!** This procedure merely prepares the data for transmission to CMS. Once you have prepared a file for transmission, you must use CMSNet to transmit the file to CMS. For information on using this program, visit [www.qtso.com](http://www.qtso.com).

### To prepare a CMS export file:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central<sup>™</sup> page.
2. Click the **Data Management** button.
3. Click the **Communication** button.
4. Click the **Prepare CMS Export** button. The Prepare CMS Export window will appear.
5. Select a facility code from the **Facility** drop-down field.
6. Configure the CMS Export Status criteria.
  - To restrict the export file to cases with a blank CMS Export Status, select the **Include only cases with blank CMS Export Status** checkbox.
  - To include all cases regardless of CMS Export Status, clear the **Include only cases with blank CMS Export Status** checkbox.
7. Configure the Medicare inclusion criteria.
  - To include cases with a secondary payment source of Medicare, select the **Include all cases having a Medicare secondary pay source** checkbox.
  - To exclude cases with a secondary payment source of Medicare, clear the **Include all cases having a Medicare secondary pay source** checkbox.
8. Configure the CMS/Lockdown Status inclusion criteria.
  - To view all case records with a CMS Status of CMS and a Lockdown Status of Locked, select the **All ready cases** radio button.
  - **To view all cases that meet the criteria but were discharged on or after a particular date:**
    1. Select the **Cases subsequent to** radio button.
    2. Select a date from the calendar field, or enter it manually.
9. Click the **Fill Cases** button. The UDS-PROi<sup>®</sup> software will refresh the display window so that the cases in the window match the parameters you selected in steps 5–7.

10. Select the records you want to include in the CMS export file.
  - To include a record in the export file, select the checkbox in the leftmost column that corresponds to the record you want to include.
  - To include all records, select the checkbox at the top of the leftmost column.
  - To exclude a record from the export file, clear the checkbox in the leftmost column that corresponds to the record you want to exclude.
11. Make any necessary changes to each record's *correction number*. CMS uses the *correction number* to track the number of times a record has been transmitted previously to CMS. The correction number starts at 00 (indicating that the record was never previously transmitted) and must increase by one with each new transmission of the record to CMS. For example, the first two transmissions of a record must have correction numbers of 00 and 01, and the third transmission must have a correction number of 02.
  - **To change a record's correction number:**
    1. Click once in the **Correction Number** field.
    2. Enter the new correction number.
12. Click the **Download Export File** button. The Download dialog will appear.
13. Click the **Download** button.
14. Save the file to your network.
15. Click the **Close** button to close the Download dialog. The CMS Export Detail dialog will appear. This dialog shows the status field of each exported record, which will change to show that the record was exported or re-exported, as appropriate.
16. Click the **Close** button to close the CMS Export Detail dialog. The software will update the CMS Export Status of each exported record in the grid, as appropriate.
17. Click the **Close** button to close the Prepare CMS Export window.

## Rebuilding CMS export files

The UDS-PROi<sup>®</sup> software stores all patient record information from each data file you have prepared for transmission to CMS. It saves this information in a special storage table. You can retrieve this information piece by piece from the storage table, allowing you to recreate a lost CMS export file and to build composite CMS export files (i.e., files that contain records from several stored CMS export files).

In addition, you can use the filters available in this module to view the historical data flow for each patient. This ability is particularly useful when you need to identify the correction numbers used with each preparation of a particular patient record for transmission to CMS.

**Important!** The options presented in this section will affect only the information stored in the storage table. They will not affect the actual CMS export files you have created.

### To rebuild a CMS export file:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Communication** button.
4. Click the **Manage CMS Files** button. The Manage CMS Files window will appear.
5. Select a facility code from the **Facility** drop-down field.
6. Use the filter features in the Exported Files area to limit the information in the display window.
7. Follow the instructions below, depending on the CMS export tasks you want to perform.

- **To rebuild a CMS export file:**

1. Select the checkbox to the left of the file you want to rebuild.
2. Click the arrow to the left of the file you selected in step 1. The records included in the export file will appear in the display window.
3. Select the checkbox to the left of each record shown in the expanded view.
4. Click the **Create File** button. The Download dialog will appear.
5. Click the **Download** button.
6. Save the file to your network.
7. Click the **Close** button to close the Download dialog.

- **To build a composite CMS transmission file:**

1. Select the checkbox to the left of each file from which you will extract records.
2. Click the arrow to the left of each file you selected in step 1. The records included in the export files will appear in the display window.
3. Select the checkbox to the left of each record you want to include in the composite export file.
4. Click the **Create File** button. The Download dialog will appear.



5. Click the **Download** button.
  6. Save the file to your network.
  7. Click the **Close** button to close the Download dialog.
- **To archive information from the storage table:**
    1. Select the checkbox to the left of the file you want to archive.
    2. Click the **Archive** button. A confirmation dialog will appear.
    3. Click the **Yes** button to close the confirmation dialog. The Download dialog will appear.
    4. Click the **Download** button.
    5. Save the file to your network.
    6. Click the **Close** button to close the Download dialog.

Archiving the information contained in the storage table will essentially rebuild a particular CMS export file, but it will remove the stored information from the storage table. You may archive only one file at a time.

- **To delete information from the storage table:**
  1. Select the checkbox to the left of each file you want to delete.
  2. Click the **Delete** button. A confirmation dialog will appear.
  3. Click the **Yes** button to close the confirmation dialog. After the UDS-PROi® software deletes the information from the storage table, an information dialog will appear.
  4. Click the **OK** button to close the information dialog.

**Be very careful when using this module!** This process will delete the information contained in the highlighted files from the storage table only. It will not delete this information from the actual transmission files. If you do not have a copy of the transmission files, you will lose all access to this information. You cannot delete individual patient records from the storage table.

8. Click the **Close** button to close the Manage CMS Files window.

## Creating CMG export files

You can use the UDS-PROi<sup>®</sup> software to create an export file that contains CMG information for your facility. You can print this file or import it into a third-party software system to aid or supplement your billing.

Because the UDS-PROi<sup>®</sup> software exports CMG data in only one format, you will need to format the exported file (by hand or by script) before you can use it in your third-party system.

### To create a CMG export file:

1. Select a facility code from the drop-down field at the top of the UDSPRO Central™ page.
2. Click the **Data Management** button.
3. Click the **Communication** button.
4. Click the **Prepare CMS Export** button. The Prepare CMS Export window will appear.
5. Select a facility code from the **Facility** drop-down field.
6. Configure the CMS Export Status criteria.
  - To restrict the export file to cases with a blank CMS Export Status, select the **Include only cases with blank CMS Export Status** checkbox.
  - To include all cases regardless of CMS Export Status, clear the **Include only cases with blank CMS Export Status** checkbox.
7. Configure the Medicare inclusion criteria.
  - To include cases with a secondary payment source of Medicare, select the **Include all cases having a Medicare secondary pay source** checkbox.
  - To exclude cases with a secondary payment source of Medicare, clear the **Include all cases having a Medicare secondary pay source** checkbox.
8. Configure the CMS/Lockdown Status inclusion criteria.
  - To view all case records with a CMS Status of CMS and a Lockdown Status of Locked, select the **All ready cases** radio button.
  - **To view all cases that meet the criteria but were discharged on or after a particular date:**
    1. Select the **Cases subsequent to** radio button.
    2. Select a date from the calendar field, or enter it manually.
9. Click the **Fill Cases** button. The UDS-PROi<sup>®</sup> software will refresh the display window so that the cases in the window match the parameters you selected in steps 5–7.
10. Select the records you want to include in the CMS export file.
  - To include a record in the export file, select the checkbox in the leftmost column that corresponds to the record you want to include.
  - To include all records, select the checkbox at the top of the leftmost column.

- To exclude a record from the export file, clear the checkbox in the leftmost column that corresponds to the record you want to exclude.
11. Select a CMG export file specification format from the **Choose File Version** drop-down field.
  12. Click the **Download CMG Export File** button. The Download dialog will appear.
  13. Click the **Download** button.
  14. Save the file to your network.
  15. Click the **Close** button to close the Download dialog.
  16. Click the **Close** button to close the Prepare CMS Export window.

## Viewing verification reports

You can use the UDSPRO Central™ site to confirm that your patient data files were successfully transmitted from your database to the UDSMR® national database. UDSMR produces verification reports that contain information related to the records you submitted.

### To view verification reports:

1. Click the **Reports** button.
2. Click the **Published Reports (PDF)** button. The Published Reports (PDF) window will appear.
3. Click the **Run a Report** button (which looks like a green arrow) to the left of the Submission Reports marker.
4. Use the links on the next page to access your reports. Three report types are available:
  - **Initial Report:** This report contains information about collected data, including the file's structure, the number of cases and assessments contained in the file, and the file's preload status.
  - **Final Detail Report:** This report contains information about data that has been loaded into the national database, including the file's logic check information. It also provides in-depth information about the errors contained in the loaded data.
  - **Final Summary Report:** This report contains information about data that has been loaded into the national database, including the file's logic check information. It also includes general information about the errors contained in the loaded data.

### To access the verification report explanation guide:

1. Click the **Reports** button.
2. Click the **Published Reports (PDF)** button. The Published Reports (PDF) window will appear.
3. Click the **Run a Report** button (which looks like a green arrow) to the left of any report category. The Published Reports window will appear.
4. Click the **Report Guides** tab.
5. Click the PDF icon to the left of the verification report explanation guide. The guide will open in a separate window.
6. When you are finished, click the **X** in the upper right corner of the guide window to close it.

# Accessing Subscriber Tools

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## Software-related tools

The UDSPRO Central™ website contains a number of documents related to the UDS-PROi® software, including the UDS-PRO® Report Catalog, file specifications, and instructional videos.

### To access software-related tools:

1. Click the **Subscriber Tools** button.
2. Click the **Software** button.
3. Click the button that corresponds to the category you want to view.
  - **To view the UDS-PRO® Report Catalog:**
    1. Click the **Documents** button. The Subscriber Tools: Software window will appear.
    2. Click the PDF icon that appears to the left of the UDS-PRO® System Report Catalog. The report catalog will open in a separate window.
      - **To print the catalog:**
        1. Click the printer icon. A printer dialog will appear.
        2. Configure your printer options.
        3. Click the **OK** button.
    3. When you are finished, click the **X** in the upper right corner of the report catalog window to close it.
  - **To access other software documents:**
    1. Click the **Documents** button. The Subscriber Tools: Software window will appear. The other software documents will appear in the Software Documents area.
    2. Click the PDF icon that corresponds to the file you want to view. The file will open in a separate window.
      - **To print the document:**
        1. Click the printer icon. A printer dialog will appear.
        2. Configure your printer options.
        3. Click the **OK** button.
    3. When you are finished, click the **X** in the upper right corner of the window to close it.
  - **To access file specifications:**
    1. Click the **Documents** button. The Subscriber Tools: Software window will appear. The file specifications will appear in the Software Specifications area.

2. Click the PDF icon that corresponds to the file specifications you want to view. The file specifications will open in a separate window.
  - **To print the file specifications:**
    1. Click the printer icon. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **OK** button.
  - 3. When you are finished, click the **X** in the upper right corner of the window to close it.
- **To access help documents and instructional videos:**
  1. Click the **Help/Videos** button. The Subscriber Tools: Software window will appear.
  2. Click the icon that appears to the left of the PDF file or instructional video you want to view.

If you are accessing a video, run the video directly from the UDSPRO Central™ website or save it to your network for later viewing.

## Submission dates

You can use the UDSPRO Central™ website to access UDS-PRO® System submission date information.

### To view the submission date information:

1. Click the **Subscriber Tools** button.
2. Click the **Submission Dates** button.
3. Click the PDF icon to the left of the latest data submission calendar. The calendar will open in a new window.
  - **To print the calendar:**
    1. Click the printer icon. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **OK** button.
4. When you are finished, click the **X** in the upper right corner of the calendar window to close it.

## **Contacting UDSMR**

You can use the UDSPRO Central™ website to access contact information relevant to UDSMR.

### **To access the contact information:**

1. Click the **Subscriber Tools** button.
2. Click the **Contact Us** button.



## The UDSPRO Central™ forum

The UDSPRO Central™ forum allows you to communicate with UDSMR staff members and users at other facilities.

### To access the forum:

1. Click the **Subscriber Tools** button.
2. Click the **Forum** button. The UDSPRO Central™ forum will appear in a separate window.
3. Use the links to view topics.
4. When you are finished, click the **X** in the upper right corner of the window to close the UDSPRO Central™ forum.

## Accessing Clinical Resources

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### Consultations and workshops

The UDSPRO Central™ website provides information about consultation services and upcoming workshops offered by our Education, Training, and Consultation (ETC) department.

#### To access information about consultation services and upcoming workshops:

1. Click the **Clinical** button.
2. Click the **Consultation/Workshops** button.
3. Click the PDF icon to the left of the document you want to view. The document will open in a separate window.
  - **To print the document:**
    1. Click the printer icon. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **OK** button.
4. When you are finished, click the **X** button in the upper right corner of the window to close it.

## Education and training resources

The UDSPRO Central™ website provides access to a large number of education and training resources, including free forms, video demos, and guidelines for rating Bladder Management and Bowel Management, as well as order forms you can use to order resources not available for free on the website.

### To access education and training resources:

1. Click the **Clinical** button.
2. Click the **Education and Training Resources** button. A list of resources will appear.
3. Click the icon that appears to the left of the document you want to view. The document will open in a separate window.
  - **To print any file other than a video file:**
    1. Click the printer icon. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **OK** button.
4. When you are finished, click the **X** button in the upper right corner of the window to close it.

## Documents and forms

The UDSPRO Central™ website provides access to a large number of clinical documents that you can download and use at your facility, including sample forms, decision trees, and an IRF-PAI FAQ.

### To access clinical documents and forms:

1. Click the **Clinical** button.
2. Click the **Documents/Forms** button.
3. Click the PDF icon that appears to the left of the document you want to view. The document will open in a separate window.
  - **To print a document:**
    1. Click the printer icon. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **OK** button.
4. When you are finished, click the **X** button in the upper right corner of the window to close it.

## On-demand educational webcasts

The UDSPRO Central™ website provides access to several free educational webcasts. Subscribers who have purchased a separate on-demand webcast subscription can use the site to access many additional webcasts.

### To access a webcast:

1. Click the **Clinical** button.
2. Click the **On Demand Educational Webcasts** button.
  - To view a video, click the video icon that appears to the left of it. The video will open in a separate window. To close the video, click the **X** button in the upper right corner of the window.
  - To access a supplementary PDF file, click the PDF icon that appears to the left of it. The file will open in a separate window. (To print the document, click the printer icon, configure your printer options, and then click the **OK** button.) To close the file, click the **X** button in the upper right corner of the window.

## IRF-PAI training

If you have purchased *The IRF-PAI Rating Tutorial*, you can use the UDSPRO Central™ website to access it.

To view a demo of the rating tutorial, click the **Clinical** button, click the **Education and Training Resources** button, and then click the icon to the left of the **IRF-PAI Rating Tutorial**. If you want to order this product, click the icon to the left of the **UDS-PRO® System Education Resources Order Form** and follow the instructions for completing the order form.

### To view the rating tutorial:

1. Click the **Clinical** button.
2. Click the **IRF-PAI Training** button. The IRF-PAI Rating Tutorial will begin playing.
3. Follow the instructions to complete the rating tutorial.
4. When you are finished, navigate to another section of the website.

## **CMS information**

The UDSPRO Central™ website includes a page full of information related to CMS, including the latest version of *The IRF-PAI Training Manual*, provider call transcripts, and documents related to the 60% rule, comorbid conditions, and other topics.

### **To access CMS information:**

1. Click the **Clinical** button.
2. Click the **CMS Information** button. The CMS Information window will appear.
3. Click the icon that appears to the left of the document you want to read. The document will open in a separate window.
  - **To print a document:**
    1. Click the printer icon. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **OK** button.
4. When you are finished, click the **X** button in the upper right corner of the window to close it.

## Appeals services

UDSMR offers many services related to the Medicare appeals process. You can use the UDSPRO Central™ website to learn more about these services and to access important documents related to the Medicare appeals process.

### To access appeals information:

1. Click the **Clinical** button.
2. Click the **Appeals** button. The Appeals window will appear.
3. Click the PDF icon that appears to the left of the document you want to read. The document will open in a separate window.
  - **To print a document:**
    1. Click the printer icon. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **OK** button.
4. When you are finished, click the **X** button in the upper right corner of the window to close it.



## Accessing News from UDSMR

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### Announcements

You can use the News section to view announcements from UDSMR about the UDSPRO Central™ website and the UDS-PROi® software, including information about scheduled outages.

#### To view announcements:

1. Click the **News** button.
2. Click the **Announcements** button. The Announcements window will appear.
3. Click the link of the announcement you want to read. The announcement details will appear on a new page.
  - To print the article, click the **Print This Article** button.
  - To view other announcements, use the **Next Announcement** and **Previous Announcement** links.

## eNewsletters

You can use the News section to view recent issues of the *UDS-PRO® News*, which contains information related to the UDS-PRO® System.

### To view the eNewsletters:

1. Click the **News** button.
2. Click the **eNewsletters** button. The News and Announcements window will appear. The list of newsletters will be sorted by date and headline.
3. Click the HTM icon that corresponds to the newsletter you want to read. The newsletter will appear in a new window.
  - To view archived issues, click the link at the top of the page.
  - **To print the newsletter:**
    1. Click the **Print** button. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **OK** button.
4. When you are finished, click the **Close Window** button to close the newsletter window.

## Connections

You can use the News section to view recent issues of the quarterly *Connections* newsletter, which, until 2011, provided information related to all the product lines available from UDSMR.

### To view the newsletters:

1. Click the **News** button.
2. Click the **Connections** button. The News and Announcements window will appear. The list of newsletters will be sorted by date and headline.
3. Click the PDF icon that corresponds to the newsletter you want to read. The newsletter will appear in a new window.
  - To view archived issues, click the link at the top of the page.
  - **To print the newsletter:**
    1. Click the printer icon. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **OK** button.
4. When you are finished, click the **X** in the upper right corner of the newsletter window to close it.

## **ETC News**

You can use the News section to view recent issues of the *ETC News*, which contains information related to education, training, and consultation news from UDSMR.

### **To view the ETC News:**

1. Click the **News** button.
2. Click the **ETC News** button. The News and Announcements window will appear. The list of newsletters will be sorted by date and headline.
3. Click the HTM icon that corresponds to the newsletter you want to read. The newsletter will appear in a new window.
  - To view archived issues, click the link at the top of the page.
  - **To print the newsletter:**
    1. Click the **Print** button. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **OK** button.
4. When you are finished, click the **Close Window** button to close the newsletter window.

## Bulletins

You can use the News section to view recent issues of the *UDS-PRO® Bulletin*, which contains important information about the UDSPRO Central™ website and the UDS-PROi® software.

### To view bulletins:

1. Click the **News** button.
2. Click the **UDS-PRO® Bulletin** button. The News and Announcements window will appear. The list of bulletins will be sorted by date and headline.
3. Click the PDF icon that corresponds to the bulletin you want to read. The bulletin will appear in a new window.
  - To view archived issues, click the link at the top of the page.
  - **To print the bulletin:**
    1. Click the printer icon. A printer dialog will appear.
    2. Configure your printer options.
    3. Click the **OK** button.
4. When you are finished, click the **X** in the upper right corner of the bulletin window to close it.

## Other links

You can use the News section to access links of general interest to UDS-PRO<sup>®</sup> System subscribers.

### To access the links:

1. Click the **News** button.
2. Click the **Other Links** button. The Other Links window will appear.
3. Click the link that corresponds to the page you want to access. The target page will open in a new browser window.
4. When you are finished, click the **X** in the upper right corner of the browser window to close it.

## **Managing Facility News**

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### **About the Our Facility News feature**

The Our Facility News feature allows you to post facility-specific news directly to the UDSPRO Central™ website. This information can be created, edited, deleted, and read **only** by members of your facility.

## Creating news messages

The Our Facility News feature allows you to post facility-specific news directly to the UDSPRO Central™ website. Only members of your facility can create this information.

### To create a news message:

1. Click the **Our Facility News** button. The Our Facility News dialog will appear.
2. Enter a message in the space provided. The message is limited to 1,024 characters. Use the `<u></u>`, `<i></i>`, and `<b></b>` tags to apply underlining, italics, and boldface, respectively.
3. When you are finished, click the **Save Message** button. An information dialog will appear.
4. Click the **OK** button to close the information dialog.
5. Click the **Close** button to close the Our Facility News dialog.



## Editing news messages

The Our Facility News feature allows you to post facility-specific news directly to the UDSPRO Central™ website. Only members of your facility can edit this information.

### To edit a news message:

1. Click the **Our Facility News** button. The Our Facility News dialog will appear.
2. Enter a message in the space provided. The message is limited to 1,024 characters. Use the `<u></u>`, `<i></i>`, and `<b></b>` tags to apply underlining, italics, and boldface, respectively.
  - Any text you do not delete will remain on display in the Our Facility News section of the UDSPRO Central™ website.
  - To reset the message to its saved state and start again, click the **Reset** button.
3. When you are finished, click the **Save Message** button. An information dialog will appear.
4. Click the **OK** button to close the information dialog.
5. Click the **Close** button to close the Our Facility News dialog.

## Deleting news messages

The Our Facility News feature allows you to post facility-specific news directly to the UDSPRO Central™ website. Only members of your facility can delete this information.

### To delete a news message:

1. Click the **Our Facility News** button. The Our Facility News dialog will appear.
2. Delete all the text in the message field.
3. Click the **Save Message** button. An information dialog will appear.
4. Click the **OK** button to close the information dialog.
5. Click the **Close** button to close the Our Facility News dialog.

## Reading news messages

The Our Facility News feature allows you to post facility-specific news directly to the UDSPRO Central™ website. Only members of your facility can read this information.

### To read a news message:

1. Click the **Home** button. The UDSPRO Central™ home page will appear.
2. Read the information in the Our Facility News area.

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