

1

Simple and Easy: Winning in PDPM Payment and Regulatory Strategies

Untangle Your MDS 3.0 Data Processes

MDS Data Formulation & Documentation

Central Documentation Form Instructions

Note: This form is printable, and meant for use by Administrators and MDS Managers

- Date the form each time you edit or change information.
- Staff name and title.
- MDS Submission Deadline – when does data need to be documented or completed to the MDS office.
- RAI Manual Date – Record date that RAI Manual instructions were given to staff coding the Section.
- Training Notes - Specific orientation and training documentation with dates.
- Updates – record when coding updates are given to the staff member.
- Open column for facility specific data or administrative approvals of changes.
- This master form should be in the MDS office – (managed by the MDS manager) and in the Administrator’s office to demonstrate regulatory compliance.

| Documentation | Staff Name/Title | MDS Submission Deadline | Date RAI Manual Provided | Training Notes & Dates | Recorded Updates | Additional Notes |
|---------------|------------------|-------------------------|--------------------------|------------------------|------------------|------------------|
| Scheduling | | | | | | |
| | | | | | | |

continued

| Documentation | Staff Name/Title | MDS Submission Deadline | Date RAI Manual Provided | Training Notes & Dates | Recorded Updates | Additional Notes |
|---------------------------------------------|------------------|-------------------------|--------------------------|------------------------|------------------|------------------|
| Section A Identification Information | | | | | | |
| | | | | | | |
| | | | | | | |
| Section B Hearing, Speech, and Vision | | | | | | |
| | | | | | | |
| Section C Cognitive Patterns | | | | | | |
| | | | | | | |
| | | | | | | |
| Interview | | | | | | |
| Section D Mood | | | | | | |
| Interview | | | | | | |
| Section E Behavior | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

continued

| Documentation | Staff Name/Title | MDS Submission Deadline | Date RAI Manual Provided | Training Notes & Dates | Recorded Updates | Additional Notes |
|---------------------------------------------------------------------|------------------|-------------------------|--------------------------|------------------------|------------------|------------------|
| Section F Preferences for Customary Routine and Activities | | | | | | |
| | | | | | | |
| | | | | | | |
| Interview | | | | | | |
| Section G Functional Status | | | | | | |
| | | | | | | |
| | | | | | | |
| Section G Functional Abilities and Goals | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| Section H Bladder and Bowel | | | | | | |
| | | | | | | |
| | | | | | | |
| Section I Active Diagnoses | | | | | | |
| | | | | | | |
| | | | | | | |

continued

| Documentation | Staff Name/Title | MDS Submission Deadline | Date RAI Manual Provided | Training Notes & Dates | Recorded Updates | Additional Notes |
|---------------------------------------------------|------------------|-------------------------|--------------------------|------------------------|------------------|------------------|
| Section J Health Conditions | | | | | | |
| | | | | | | |
| | | | | | | |
| Interview | | | | | | |
| Section K Swallowing/ Nutritional Status | | | | | | |
| | | | | | | |
| | | | | | | |
| Section L Oral/Dental Status | | | | | | |
| Section M Skin Conditions | | | | | | |
| | | | | | | |
| Section N Medications | | | | | | |
| | | | | | | |
| | | | | | | |

continued

| Documentation | Staff Name/Title | MDS Submission Deadline | Date RAI Manual Provided | Training Notes & Dates | Recorded Updates | Additional Notes |
|-----------------------------------------------------------------|------------------|-------------------------|--------------------------|------------------------|------------------|------------------|
| Section O Special Treatments | | | | | | |
| | | | | | | |
| | | | | | | |
| Section P Restraints and Alarms | | | | | | |
| Section Q Participation in Assessment and Goal Setting | | | | | | |
| | | | | | | |
| | | | | | | |
| Interview | | | | | | |
| Section Z Assessment Administration Z-100 | | | | | | |

| Documentation | Staff Name/Title | MDS Submission Deadline | Date RAI Manual Provided | Training Notes & Dates | Recorded Updates | Additional Notes |
|---------------|------------------|-------------------------|--------------------------|------------------------|------------------|------------------|
| Z400 | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Administrator: _____
 Signature

 Date

MDS Manager: _____
 Signature

 Date