

# Monitoring the interRAI LTCF assessment status of residents

## Information for Aged Residential Care Facility Managers

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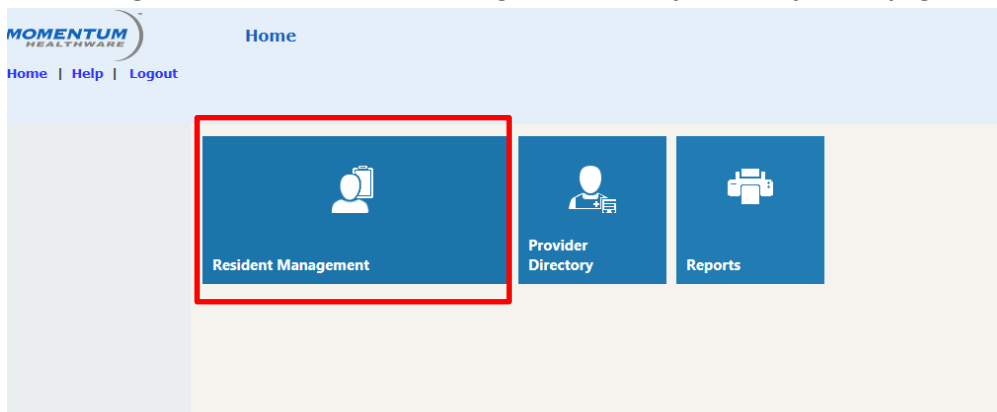
### What is the *To Do Dashboard*?

The *To Do Dashboard* allows you to create a list of your current residents who have either a first LTCF assessment or LTCF re-assessment due.

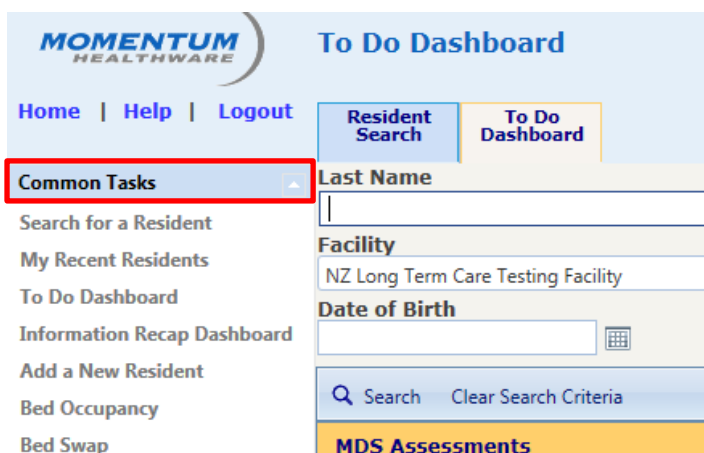
- The due date for a first assessment is based on the date the resident was admitted to interRAI (due in 21 days from this date)
- The due date for a re-assessment is based on the assessment reference date (ARD) for the last completed LTCF assessment (due within 6 months from previous assessment)

### How do I create a *To Do Dashboard* for my residents?

1. Login and select '*Resident Management*' from your facility home page.



2. Then find the '*Common Tasks*' menu on the left side of your screen.



3. Under the '*Common Tasks*' menu, click on '*To Do Dashboard*'.

4. Ensure you have selected 'Active' in the 'Record Status' from the drop down box.  
 This will exclude inactive and deceased residents from the list of residents displayed.

Primary ID	Last Name	First Name	Assessment	Expected ARD	Status
HGW4444	Fairfax	Betty	LTCF Assessment version 9.1	20-09-2014	Upcoming in 13 Days
RES0002	Resident	Two	LTCF Assessment version 9.1	31-08-2014	Past Due by 7 Days
DDD8777	Nadya	Test119.0024	LTCF Assessment version 9.1	25-08-2014	Past Due by 13 Days
DMX1212	Davidoff	Max	LTCF Assessment version 9.1	17-08-2014	Past Due by 21 Days

**Note:** Inactive records are records for residents not yet admitted to a bed in your facility, or residents discharged home or to other facilities.

- Ensure any resident no longer in your facility has been discharged from interRAI so they have the correct record status.
- Your local NASC office is responsible for moving records to where they need to be.
- You will keep the records of deceased residents.

5. Click on 'Search' to see all residents with due or overdue assessments.

- The 'Dashboard' will list residents by NHI ('Primary ID'), 'Last Name' and 'First Name', 'Assessment', 'Expected due date' and 'Status'.

**To Do Dashboard**

Resident Search | To Do Dashboard

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Record Status: Active Provider: All

Facility: NZ Long Term Care Testing Facility Identifier Description: NHI Identifier Value: \_\_\_\_\_ Gender: All

Date of Birth: \_\_\_\_\_ Address: \_\_\_\_\_ Unit: All

**Q Search** Clear Search Criteria

MDS Assessments							
75 Past Due 1 Upcoming							
Primary ID	Last Name	First Name	Assessment	Expected ARD	Status		
HGW4444	Fairfax	Betty	LTCF Assessment version 9.1	20-09-2014	Upcoming in 13 Days		
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DMX1212	Davidoff	Max	LTCF Assessment version 9.1	17-08-2014	Past Due by 21 Days		

The list of residents' assessments can then be accessed directly by clicking on the folder to the left of the resident NHI ('Primary ID') or double clicking the resident's name.

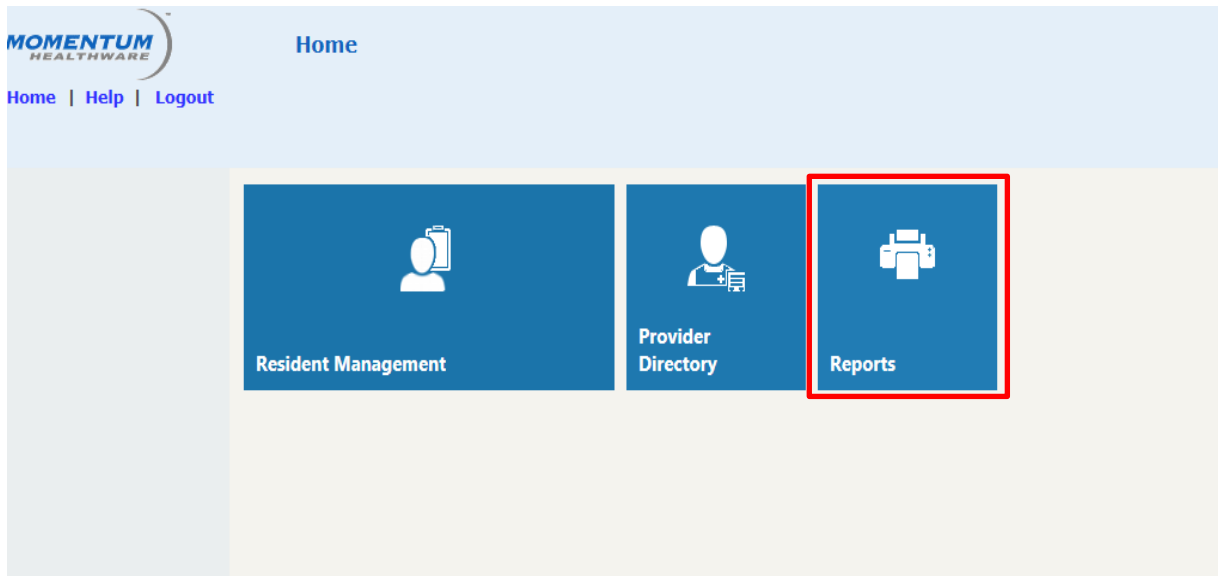
- Twenty residents are listed per page.
- Assessments that are overdue are written in **red**. If an assessment is not yet due it will be in **black** type and will indicate when it is due.
- The due date of an assessment is based on either the admission date (date the record became active) OR the last assessment date.

## Resident Listing – Assessments due

The 'Assessments Due' report displays a resident's previous assessment information and when the next assessment is due.

It provides facility and nurse managers with an overview of upcoming assessment activity and can be listed by 'Resident' (resident's name), 'Provider' (the Registered Nurse completing assessments), 'Unit' and 'Room' the resident is staying in.

### 1. To create this report, login and click on the 'Reports' icon from your facility home page



### 2. Select 'Resident Listing Assessments Due'.

Select Report			
Report Name	Report Category	Description	
	(All) <input type="button" value="v"/>		
Audit Report By Client	Integrated Report	Audit Report By Client	
Audit Report By User	Integrated Report	Audit Report By User	
Bed Occupancy Report LTC	Integrated Report	Bed Occupancy Report LTC	
Birthday Report LTC	Integrated Report	Birthday Report LTC	
Birthday Report Selected Date Range LTC	Integrated Report	Birthday Report Selected Date Range LTC	
Chart Access	Integrated Report	Chart Access Report	
InterRAI CAP Trending by Resident	Integrated Report	interRAI CAP Trend Analysis By Resident	
InterRAI Outcome Analysis by Resident	Integrated Report	interRAI Outcome Trend Analysis By Resident	
Level of Care Report	Integrated Report	The report will display all Level of Care information for LTC clients.	
Religion Report LTC	Integrated Report	Religion Report LTC	
Resident Listing Assessments Due	Integrated Report	Resident Listing Assessments Due	
Resident Listing Report LTC	Integrated Report	Resident Listing Report LTC	
Resident Listing Report w/ Attending Physician LTC by Room	Integrated Report	Resident Listing Report w/ Attending Physician LTC By Room	
Resident Listing Report w/ Provider LTC by Resident	Integrated Report	Resident Listing Report w/ Provider LTC by Resident	
Resident Listing Report w/ Provider LTC by Room	Integrated Report	Resident Listing Report w/ Provider LTC by Room	
To Do List Report LTC	Integrated Report	To Do List Report LTC	
Weight and BMI by resident	Integrated Report	Resident Listing Weight BMI	
Wound Management Report	Integrated Report	Wound Management Report	

3. Ensure the record status is set to 'Active' and click on 'View Report'

Report Criteria - Resident Listing Assessments Due

Return

Last Name First Name Record Status Provider  
 Facility Identifier Description Identifier Value Unit  
 LTC Training Practice office NHI All All

View Report

The report looks like this:

**Resident Listing  
Residential Training 2**

Unit	Room	Primary ID	Resident	Date/Type of Last Assessment	# Days Since Last	Next MDS Assessment Due
Marsden	Room A-bed 1	CAW1946	Fairfax, Jane Elizabeth (Mrs.)	30/10/2013 LTCF Assessment version 9.1: First assessment	131	27/04/2014 LTCF Assessment version 9.1
Marsden	Room A-bed 2	JEN3187	FAIRFAX, Jane Elizabeth (Mrs.)	N/A	N/A	29/03/2014 LTCF Assessment version 9.1
Marsden	Room B-bed 1	RCL3295	Fairfax, Jane Elizabeth (Mrs.)	N/A	N/A	29/03/2014 LTCF Assessment version 9.1
Marsden	Room B-bed 1	CKC1702	Fairfax, Jane Elizabeth (Mrs.)	N/A	N/A	29/03/2014 LTCF Assessment version 9.1
Marsden	Room C-bed 3	MPN2008	Fairfax, Jane Elizabeth (Mrs.)	N/A	N/A	29/03/2014 LTCF Assessment version 9.1
Marsden	Room C-bed 3	JLH1960	Fairfax, Jane Elizabeth (Mrs.)	N/A	N/A	29/03/2014 LTCF Assessment version 9.1
					N/A	29/03/2014

**Note:** This is an example of a report – it refers to Fairfax, Jane Elizabeth, a fictional case study resident from the training facility. Your report will list 'active' residents admitted to beds in interRAI for your facility.

## Incomplete assessments

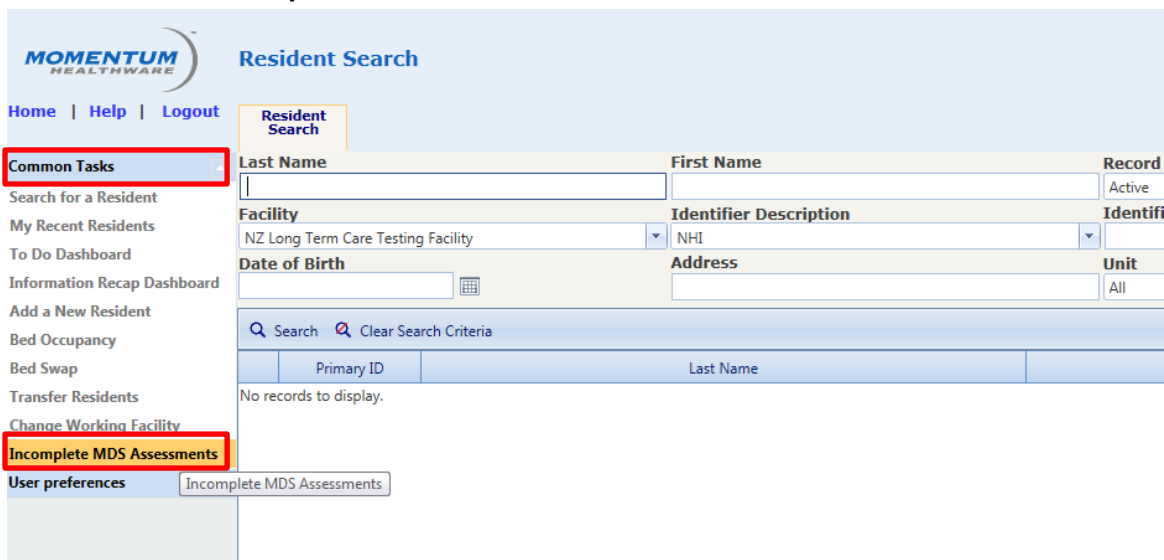
'*Incomplete MDS Assessments*' displays a list of residents for whom an assessment has been started but is incomplete or in draft. It also displays the sections of the assessment that are yet to be completed.

A completed assessment ensures that the resident's health record is signed off by the assessing nurse and is closed off from changes being made. Searching for '*Incomplete Assessments*' will allow the assessor to complete any outstanding assessments and/or delete any assessments opened in error.

**Note:** Blank (uncoded) draft assessments created in error can **be deleted by the interRAI Educator who trained your RN.**

To find all incomplete assessments at your facility:

1. Under the '*Common Tasks*' menu on the left of your screen click on '*Incomplete MDS Assessments*' on the left side of your screen.



The screenshot shows the Momentum Healthware Resident Search interface. On the left sidebar, the 'Common Tasks' menu is highlighted in red, and the 'Incomplete MDS Assessments' option is also highlighted in red. The main search area is titled 'Resident Search' and contains several search criteria: Last Name, First Name, Facility (set to 'NZ Long Term Care Testing Facility'), Identifier Description (set to 'NHI'), Date of Birth, and Address. Below the search criteria is a search bar with a magnifying glass icon and a 'Clear Search Criteria' button. The search results area is currently empty, displaying 'No records to display.'

- Nurses, Clinical Managers and Clinical Leads can view the progress of assessments for residents in their facility from the '*Incomplete MDS Assessments*' report.
- They can check for completeness of assessments before running other reports.

## 2. Ensure you have selected 'Active' in the 'Record Status' drop down box

This will exclude inactive and deceased residents from the list of residents displayed.

**Note:** Inactive records are records for residents not yet admitted to a bed in your facility or residents discharged home or to other facilities. Ensure any resident no longer in your facility has been discharged from interRAI so they have the correct record status.

## 3. Click on 'View Assessments'.

**MOMENTUM HEALTHWARE** Incomplete MDS Assessments

Home | Help | Logout

Resident Search | Incomplete MDS Assessments

**Common Tasks**

Search for a Resident  
My Recent Residents  
To Do Dashboard  
Information Recap Dashboard  
Add a New Resident  
Bed Occupancy  
Bed Swap  
Transfer Residents  
Change Working Facility  
Incomplete MDS Assessments

User preferences

Last Name: [ ] First Name: [ ] Record Status: Active Provider: All  
Facility: NZ Long Term Care Testing Facility Identifier Description: NHI Identifier Value: [ ] Gender: All  
Date of Birth: [ ] Address: [ ] Unit: All

View Assessments

Primary ID	Last Name	First Name	Assessment	Reference Date	Last Modified Date	Incomplete Section
No records to display.						

The screen will show the residents with assessments awaiting completion with the 'Assessment', 'Reference Date', 'Last Modified Date', 'Incomplete Section', and a tick box indicating if the assessment is 'Ready to be Marked Complete'.

**Incomplete MDS Assessments**

Resident Search | Incomplete MDS Assessments

Last Name: [ ] First Name: [ ] Record Status: Active Provider: All  
Facility: NZ Long Term Care Testing Facility Identifier Description: NHI Identifier Value: [ ] Gender: All  
Date of Birth: [ ] Address: [ ] Unit: All

View Assessments

Primary ID	Last Name	First Name	Assessment	Reference Date	Last Modified Date	Incomplete Sections	Ready to be Marked Complete
ZZZ1098	118.0204 LTC	test	LTCF Assessment version 9.1	14-11-1961	11-02-2014	A,B,C,D,E,F,G,H,I,J,K,L,M,N,O...	<input type="checkbox"/>
ZZZ1098	118.0204 LTC	test	LTCF Assessment version 9.1	11-02-2014	11-02-2014	A,B,C,D,E,F,G,H,I,J,K,L,M,N,O...	<input type="checkbox"/>
ZZZ1098	118.0204 LTC	test	LTCF Assessment version 9.1	12-08-2014	12-08-2014	A,B,C,D,E,F,G,H,I,J,K,L,M,N,O...	<input type="checkbox"/>

Records can then be accessed directly by clicking on the folder to the left of the resident NHI ('Primary ID') or by double clicking the resident's name.

To identify the RN who started the assessment but did not mark it complete, click on 'Section S' from the LTCF summary view.

Reference Date: 08/12/2014

w Zealand customisation Momentum Healthware 2011 [CODE FOR LAST 3 DAYS UNLESS OTHERWISE]

K. Oral and nutritional status	✓ complete
L. Skin condition	✓ complete
M. Activity pursuit	✓ complete
N. Medications	✓ complete
O. Treatments and procedures	✓ complete
P. Responsibility and directives	✓ complete
Q. Discharge potential	✓ complete
R. Discharge - COMPLETE AT DISCHARGE ONLY	✓ complete
Assessment Summary	✓ complete
S. Assessment information	

## Where can I get further support or Training on these and other reports?

You can contact the interRAI Education and Support team at any time about any issues or concerns – they are there to help.

Please also contact us for information regarding the next Managers Training Workshop scheduled in your area.

**Email:** [interRAI@dhbss.health.nz](mailto:interRAI@dhbss.health.nz)

**Phone:** 0800 10 80 44

For more information about interRAI in general a copy of the managers workbook and updates for trained nurses, please visit the website: [www.interrai.co.nz](http://www.interrai.co.nz).