

CASE MIX INTERIM REPORTING

Latest Assessment Roster Report

For MA Nursing Facilities

Posted February 1, 2010

In preparation for the implementation of MDS 3.0 in October 2010, the Office of Long Term Living (OLTL) is considering changes to the Case-Mix Reimbursement System. The changes are necessary in order to be compatible with MDS 3.0. Since these decisions are not final, two reports will be issued for the February 1, 2010 Picture Date and ~~af~~any subsequent Picture Dates until final decisions have been made:

- **Basic CMI Report:** This is the standard CMI Report listing MA and non-MA residents, Assessment Reference Date (ARD) of the latest Admission, Annual or Significant Change assessment and the RUG/CMI values identified using the RUG-III v. 5.01 44-group system with PA Normalized Nursing Only CMIs. The signed Certification Page must be mailed to Myers and Stauffer LC. This report is generated in the same way CMI Reports have been created for the last 12 years as described in the Resident Data Reporting Manual.
- **Latest Assessment Roster Report (LARR):** This report will list the Resident Name, Social Security Number, ARD, AT1 and Assessment Type. The residents will be listed as MA or non-MA. The assessment selected will be the latest assessment (AA8a = 01 - 05, 10, 00; AA8b = 1 - 5, 7, 8) available for the resident. The signed Certification Page must be mailed to Myers and Stauffer LC. This roster may be used in the future to generate CMI Reports using the latest assessment.

The LARR will be posted to your MDS directory just as the Basic CMI Report is posted. The file will be identified as, e.g., LARR-Feb2010-1234567890123-20100301-143654.htm, designating the report, picture date, provider number, date of creation and time of creation in military time.

The LARR should be reviewed carefully for three (3) things:

- Are the correct residents appearing on the report compared to the census of the residents on the Picture Date?
- Is the resident's MA for MA Case-Mix status correct for the Picture Date?
- Is the correct assessment for the resident appearing on the report for the Picture Date?

Corrective actions are the same as those followed for the Basic CMI Report detailed in the Resident Data Reporting Manual available in the Bulletins Section of the MDS Welcome Page.

Two differences from the Basic CMI Report Resident List may be noted:

- More residents may appear on the LARR due to the use of all types of assessments rather than just three comprehensive types. For example, a resident who only had a Medicare 5-day assessment (AA8a = 00; AA8b = 1) completed will appear on the LARR but will not appear on the Basic CMI Report.
- A resident may appear in the Valid section of the Basic CMI Report but appear on the Non-Valid section of the LARR. This might occur when an Annual assessment was

completed in August 2009, but the quarterly due in November 2009 was not submitted. For purposes of selecting the latest assessment for inclusion on the LARR, an assessment is considered Valid if the ARD is within four (4) months prior to the Picture Date. For the Picture Date of February 1, 2010, an assessment with an ARD between October 1, 2009 and February 1, 2010 will be considered valid.

A LARR Certification Page similar to that created with the Basic CMI Report will be included. After the facility is certain the LARR is accurate, this page should be signed by the Nursing Home Administrator/Acting Administrator and mailed to Myers and Stauffer LC within five (5) business days of the Picture Date deadline.

The Myers and Stauffer Helpdesk (717-541-5809) is available for questions from vendors and providers concerning MDS 2.0 technical information, CMI Reports and LARR Reports.