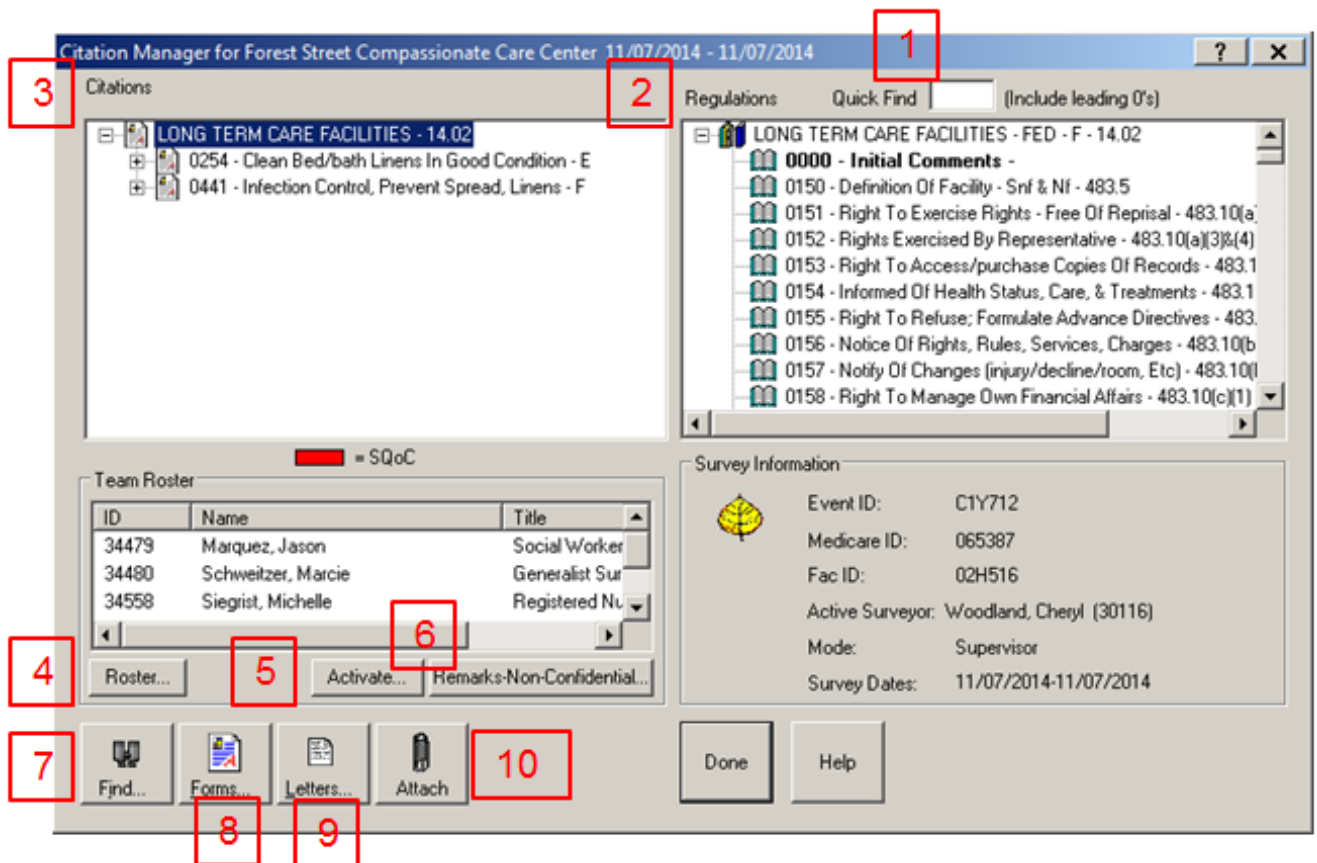


Citation Manager



1. Quick Find

- Enter tag # to search for tag

2. Regulations

- To cite a deficiency, select the tag you want to cite and drag it to the Citations section, double-click the tag, or right-click and select Add Citation. Citation Properties automatically opens.
- Condition-level tags are displayed in green and marked (Condition) in both the Regulations and Citations sections. (Visible in HHA Providers)
- Right-click a tag to view Regulation Text, Interpretive Guidelines, Custom Help, or to edit Content Library Tag Text.

3. Citations

- Lists cited deficiencies
- NH - SQoC (Substandard Quality of Care) tags are shown in red in the Citations section.
- Right-click citation to work in Supervisor mode, Delete citation, view Citation Properties, enter Correction Dates, re-order the citations list, enter POC Text, view Former Cites, and to copy the text from one citation to any other citation from the current survey
 - The Former Cites window lists the surveys, providers, surveyors, and scope/severity code for each time that this tag has been cited.

4. Roster

- Displays Team Roster where you can assign team Leader.
- Use Update button in Team Roster to open Staff Availability List and select surveyors for the survey team. The list of staff members is filtered by the Work Unit setting in the current My Selections set.

5. Activate

- Click to make the selected team member the active surveyor.

6. Remarks Non-Confidential

- You can view/enter/edit remarks for the selected surveyor, or, if you are in Supervisor mode, for all team members.
- You can also right-click a team member in the Team node in Tree view and select Remarks – Non-Confidential, or right-click the Team node and select Team Remarks – Non-Confidential to view/enter/edit remarks for, respectively, the selected surveyor or all team members.

7. Find

- You can search for text in citations, interpretive guidelines, and regulations.

8. Forms

- Opens the Select Forms to print window for printing the CMS-2567, CMS-2567B, CMS-670, CMS-1539, S/S Grid and Quick Reports. Also has buttons for 670 and 1539 Entry, and for CLIA, CMS 1557 print and entry.

9. Letters

- Generate New Letter or View Letter History

10. Attach

- Attach supplemental materials in electronic format.

Citation Properties

The screenshot shows a Windows-style dialog box titled "Citation Properties for Tag #0155". It contains several fields and controls, some of which are highlighted with red boxes and numbers:

- 1**: Points to the "Severity/Scope (A-L)" label.
- 2**: Points to the "Past Noncompliance" checkbox.
- 3**: Points to the "Correction Date" dropdown menu.
- 4**: Points to the "Citation Category" label.
- 6**: Points to the "POC Detail" section header.

The dialog box includes the following elements:

- Buttons**: "OK", "Cancel", and "Help" at the bottom.
- Fields**:
 - "Severity/Scope (A-L)" with a small icon and a "Grid" button.
 - "Correction Date" with a dropdown menu showing "/ /".
 - "Citation Category" with a list box containing "D-Follow-up/Revisit" and "I-Recertification".
 - "Past Noncompliance" checkbox.
 - "POC Detail" section with:
 - "POC Received from Facility" dropdown menu showing "/ /".
 - "Set All Tags to These POC Dates" button.
 - "Facility POC Complete (x5)" dropdown menu showing "/ /".
 - "SA POC Accepted" dropdown menu showing "/ /".

1. Severity/Scope - Select if required.

2. NH only - Select the Past Noncompliance indicator if applicable.

- This indicator is available when the Exit date for an NH survey is on or after 11/01/2005. If you select this indicator for a citation on a standard survey, the Correction Date field is displayed and enabled.
- You can cite Past Noncompliance (PNC) tags on a survey as well as current noncompliance tags. PNC citations are allowed on revisits.

3. Correction Date.

- This field appears only for follow-up surveys, however it will appear if you select Past Noncompliance for a citation on a standard NH survey.
- For Transplant Hospitals, Correction Date is entered at the transplant type level in the Citation Dates by Transplant Type window.

4. Citation Category

- Select or deselect as appropriate.
- All categories are selected by default, so you must deselect any that do not apply. For a combined survey, be sure that all categories to which the tag applies are selected.

5. Buildings (not in image)

- This field is displayed only for LSC surveys. Only buildings associated with the regulation set that the tag belongs to can be selected.

6. POC Detail

- If applicable, provide tag-level POC dates.
- **NH** - This section is disabled if the PNC indicator is selected.
- These dates are automatically entered by ePOC for surveys posted to ASPEN Web: ePOC.

7. Transplant Types (Transplant Hospitals only)

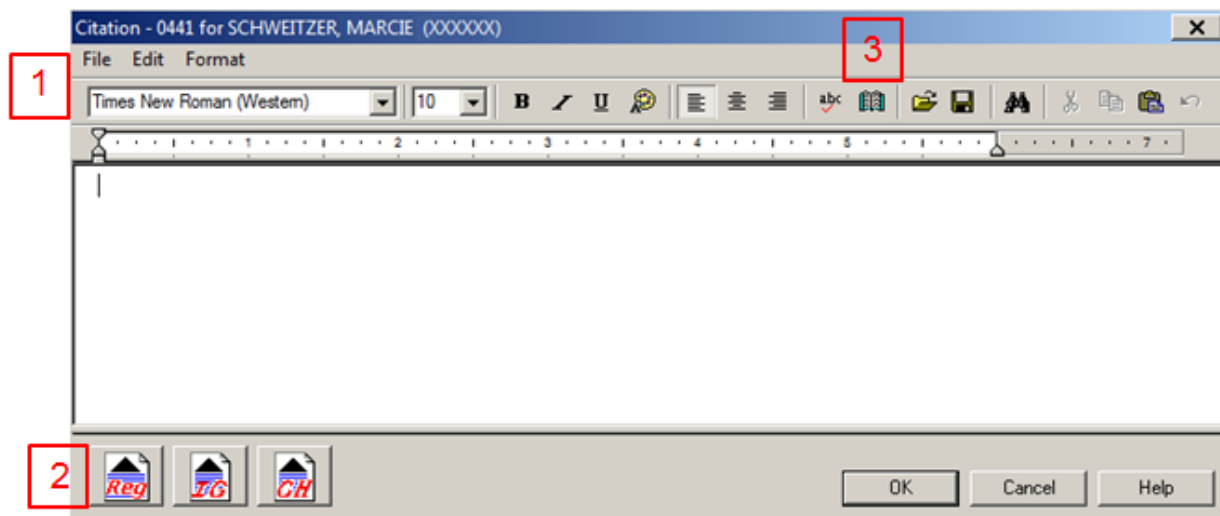
- For Transplant Hospitals, click the Transplant Types button and in the Select Transplant Types window, select the transplant types (programs) to associate with the citation.
- The number on the button indicates how many types are currently selected.

8. Update Dates (Transplant Hospitals only)

- Select Update Dates in the Select Transplant Types window to enter Completion (X5) and Correction dates for each transplant type associated with the citation.

9. Click OK and enter citation text in the Citation notepad.

Citation Notepad



1. Toolbar and Menus

- Standard word processor icons in toolbar and in menus

2. Buttons

- Select Reg, IG, and CH buttons to view Regulation Text, Interpretive Guidelines, and Custom Help

3. Content Library icon

- Opens the Content Library Tag Text window
 - The Content Library feature allows you to create and maintain predefined regulation-specific tag text that is accessible from both ACO and ACTS. Add entries to the Content Library in the Citation Manager notepad once, and then use it again whenever needed in citations. You can export and import a Content Library, and transfer Content Library entries to new regulation sets.