

jRAVEN USER GUIDE

Version 1.3.0

10/01/2015



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Introduction

The Resident Assessment Instrument (RAI) and the Minimum Data Set (MDS) were developed by the Centers for Medicare & Medicaid Services (CMS).

jRAVEN (Resident Assessment Validation and Entry) is a free, Java-based application that provides an option for facilities to collect and maintain Facility, Resident, and MDS Assessment information for subsequent submission to the appropriate state and/or national data repository.

jRAVEN displays the MDS assessment instrument similar to the paper version of the form.

Once data collection is completed facilities are able to export their data from the application and submit it to the appropriate state and/or national data repository.

The version of jRAVEN is displayed on several windows in the application. In this document, the version number is not displayed on the screen prints, but rather is documented in the text as 1.X.X.

Installation

System Configuration

jRAVEN has been designed as a stand-alone application. A standalone installation is used on an independent user workstation.

jRAVEN may also be used in a network configuration. A network installation is intended to be used for a group of users with a designated database server in a separate location.

Hardware/Software Specifications

The QTSO home page lists the CMS websites for the System Requirements:

<https://www.qtso.com/index.php>

jRAVEN 1.3.0 shall support the latest Minimum System Requirements.

Installing the application

To begin using the application, navigate to the QIES Technical Support Office (QTSO) website or the Centers for Medicare & Medicaid Services website.

CMS Website: <https://www.qtso.com/cmslinks.html>

QTSO Website: <https://www.qtso.com/ravendownload.html>

Open the Installation Guide PDF and follow the instructions as documented.

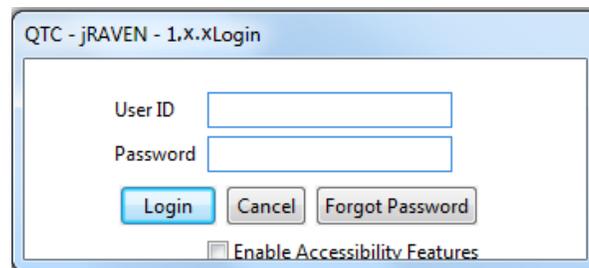
Functionality

jRAVEN software provides the following functionality:

- Facility Setup/Maintenance
- User Setup/Maintenance
- Resident Setup/Maintenance
- Assessment Data Entry
- Reporting
- Importing/Exporting
- Supports Grouper/RUGS configuration

Accessibility

Selecting the Enable Accessibility Features checkbox at the bottom of the login screen will turn on accessibility features for users requiring assistive technology (e.g. screen readers). The box will remain checked or unchecked until changed by the user.



If the user chooses to use the accessibility features, the Accessibility  icon will display in the tool bar on screens within jRAVEN. The user can either click on the icon or use ALT+J to open the accessibility screens. These informational pop up screens explain the layout of the open screen and provide shortcut key-board combinations to move the cursor around the page. For example, ALT+1 on the Facility screen will move the cursor to the beginning of the facility data entry section. When the cursor is on an arrow beside a field, the space bar will expand/collapse a section of data.

Note: When using key combinations such as ALT+1, the numbers across the top of the keyboard should be used rather than the numeric keypad.

Screen Layout

jRAVEN contains the following familiar Windows features:

Title bar - (displays the name of the software: jRAVEN)

Menu bar - Drop down lists on the menu bar contain command selections based on user roles and the open screen. Utilizing the Alt key on the keyboard will place the cursor in the menu bar. By using the arrow keys on the keyboard, users can navigate through the selections on the menu bar. For example: On the Assessment Search screen, if the cursor is on the File menu item, pressing the right directional arrow will move the cursor to the Administration menu item. Pressing the up and/or down directional arrows will navigate through the drop down menu list.

Tool bar - Each screen contains a tool bar that displays various buttons and icons to assist the user. Holding the mouse over the icons will display the name of the functionality. The availability of the icons will vary depending upon user type and which screen is displayed.

Screen tabs - Tabs for any open screens will display (e.g. Facility, Resident, and User). An asterisk (*) next to the name on the tab means there are changes that need to be saved.

Screen Size Control

Various screens are divided into multiple sections. For example, the Resident screen is divided into search, summary, and detail sections.

Each section can be collapsed by use of the arrow to the left of the section title. Clicking on the arrow a second time will expand the section.

The sections may also be resized if needed by placing the cursor over the line that separates the sections. The cursor will create an arrow. Click and drag the line to either the right or left depending on which area the user wants to expand. Columns in the Summary section can be resized by clicking and dragging on the line between headings.

Field Types

Text

Text fields allow data to be entered manually that adheres to the submission rules (length, special characters, etc.) for the specific field. The First Name field is an example of a text field.

A screenshot of a text input field. The label "First Name (A0500A)" is on the left, followed by a blue question mark icon. To the right is a rectangular text input box with a blue border.

Date

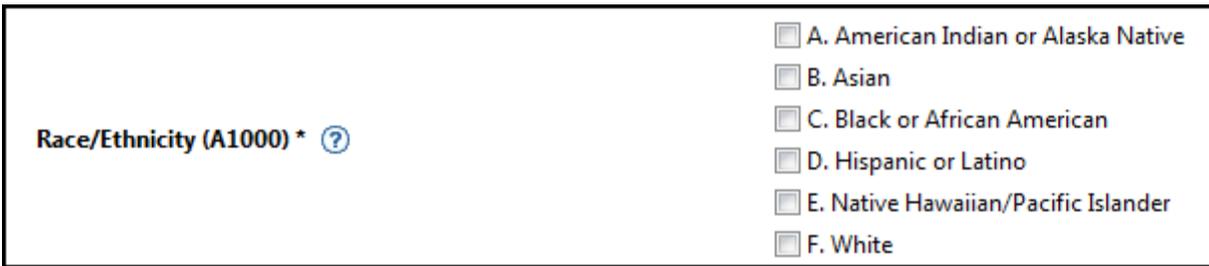
Date fields are formatted for the entry of a valid date. The date may be entered manually or by clicking on the calendar next to the date field and selecting a date. The calendar icon will be disabled if the enable accessibility feature is selected. Valid format must be in MM-DD-YYYY format where MM = 01-12, DD = 01-29, 30, or 31 depending on the month, and YYYY = the four digit year. Some date fields allow other data to be entered and accepted based on the submission rules. The Birthdate field is an example of a date field.

A screenshot of a date input field. The label "Birthdate (A0900)*" is on the left, followed by a blue question mark icon. To the right is a date input box containing "--" and a calendar icon.

Checkbox

Checkboxes allow the selection of “yes” answers simply by checking the box next to the appropriate value. Double clicking the check box will mark the response as “not assessed”.

Clicking it a third time will uncheck the box for a selection of “no”. The Race/Ethnicity field is an example of a checkbox.

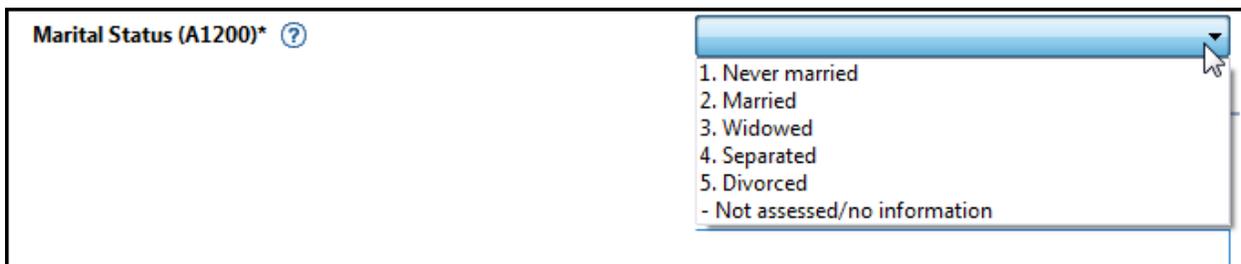


Race/Ethnicity (A1000)* ?

- A. American Indian or Alaska Native
- B. Asian
- C. Black or African American
- D. Hispanic or Latino
- E. Native Hawaiian/Pacific Islander
- F. White

Dropdown List

Dropdown lists contain allowable answers to a specific field. To answer a dropdown question, tab to the field and use the arrow keys on the keyboard to navigate through the answer options. Once the appropriate answer is displayed, use the Tab key to move to the next question. A mouse may also be used to select an answer in a dropdown list. Click the arrow on the right side of the field to expand the list. Click the desired answer. Click the mouse on the next question. The Delete key on the keyboard can be used to clear the field. The Marital Status field is an example of a dropdown list.



Marital Status (A1200)* ?

- 1. Never married
- 2. Married
- 3. Widowed
- 4. Separated
- 5. Divorced
- Not assessed/no information

Data Entry Tips

Key points regarding data entry:

For optimization of the skip patterns and/or edits, it is recommended that assessment data be entered in the order the questions appear on the screen.

Enter data in each field and use the “Tab” key on the keyboard to navigate from field to field. This allows skip patterns and edits to be appropriately applied and helps ensure all fields are addressed.

Some fields require use of additional keys. For example, checkbox fields use the “Tab” and “Shift+ Tab” key to scroll through the available responses. Once the desired response is highlighted, pressing the spacebar will make the selection. Press the “Tab” key to move to the next field and “Shift + Tab” to go to the previous selection. The mouse may also be used to move to a field and make a selection.

Order of data entry:

- Create a [facility](#)
- Create a [user](#)
- Create a [resident](#)
- Create an [assessment](#)
- [Export](#) the assessment

Edits

Data integrity edits are applied as information is entered into jRAVEN. These edits are unique messages in place to assist users with the accurate completion of data entry. Some will present a pop up message and must be addressed when displayed in order to proceed. Some edits may not appear until the entry is saved and/or validated.

The following types of edits may occur in jRAVEN:

- Errors – This type of edit lets the user know information entered is incorrect or missing. It must be corrected or entered before the information will be saved.
- Warnings – This type of edit lets the user know information entered is incorrect or missing. A warning does not need to be corrected before submission. This decision is left up to the individual performing data entry.
- Informational – This type of edit gives the user general information about the assessment.

Using the Application

Access

Once jRAVEN has been installed, access the program using one of the following methods.

Start menu – click the  icon in the start menu.

Desktop – double click the  icon found on the desktop.

Directory – navigate to the directory where jRAVEN is installed, double click the jRAVEN.exe file.

The jRAVEN splash screen displays momentarily and contains the CMS logo.



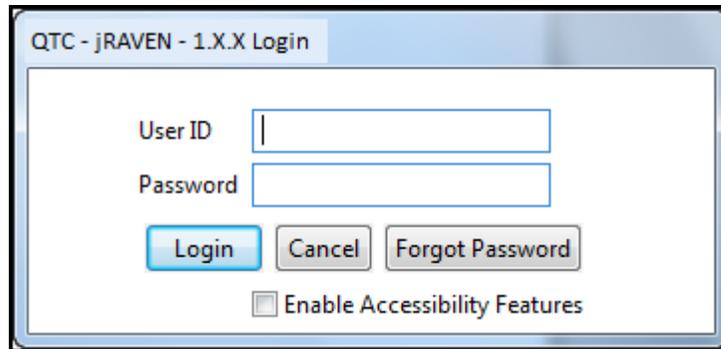
The Welcome to jRAVEN screen displays while the program is loading. This may take a few minutes and requires no response from the user.



When jRAVEN is completely loaded the Login screen displays.

Login

The title bar of the login screen displays the name (jRAVEN) and version number.



Complete the following steps to login to jRAVEN:

NOTE: For initial login, more detailed instructions can be found in the installation guide. Use of the default jraven password will not be available after the initial login is complete. The default jraven user may not be used to create residents or assessments.

1. Enter the User ID assigned by the System Administrator.
2. Enter the Password.

If this is the first time logging in for the user, enter the User ID assigned by the System Administrator in the User ID field as well as the Password field. These are case sensitive.

3. Click Login.

If this is the first time logging in for this user, the Change Password screen displays. The password rules are as follows:

- The new password and the confirm new password must match.
- The new password must be at least 8 characters long.
- The new password must be no more than 20 characters long.
- The new password must not contain any space.
- The new password must not contain the User ID, First Name, Last Name, or Email.
- The new password must not begin with a number.
- The new password can only contain a maximum of 3 repetitive characters.
- The new password must contain at least one for each of the following type of characters:
 - i. Upper-case Character: A-Z
 - ii. Lower-case Character: a-z
 - iii. Number: 0-9
 - iv. Special Character: &~`!-@# \$ % ^ * () _ + = { } [] \ | : ; " ' < > , . ? /

- The new password must not match any of the user's most recent 6 passwords.
- The new password will be set to expire in 60 days.

Change Password

The new password and the confirm new password must match.
 The new password must be at least 8 characters long.
 The new password must be no more than 20 characters long.
 The new password must not contain any space.
 The new password must not contain the User ID, First Name, Last Name, or Email.
 The new password must not begin with a number.
 The new password can only contain a maximum of 3 repetitive characters.
 The new password must contain at least one for each of the following type of characters:
 Upper-case Character: A-Z
 Lower-case Character: a-z
 Number: 0-9
 Special Character: &~!-@#\$\$%^*0_+={}|~\;''<>.,?/
 The new password must not match any of the user's most recent 6 passwords.
 The new password will be set to expire in 60 days.

New Password

Confirm New Password

4. Enter a new password in the New Password and Confirm New Password fields. The password is case sensitive and must match in both fields.
5. Click Continue to complete the login process. Click Cancel to not change the password and return to the login screen.
6. After selecting continue the Security Questions screen displays. Response to six of the ten listed security questions is required. The security questions are as follows:
 - a. What city were you born in?
 - b. What year did you graduate from high school?
 - c. What is your favorite sport?
 - d. What was the make of your first car?
 - e. What was the color of your first car?
 - f. What is your mother's maiden name?
 - g. What was the name of your first pet?
 - h. What size shoe do you wear?
 - i. What is your favorite season of the year?
 - j. What is your favorite movie?

Security Questions

To enable the OK button, a minimum of 6 answers are required.

What city were you born in?

What year did you graduate from high school?

What is your favorite sport?

What was the make of your first car?

What was the color of your first car?

What is your mother's maiden name?

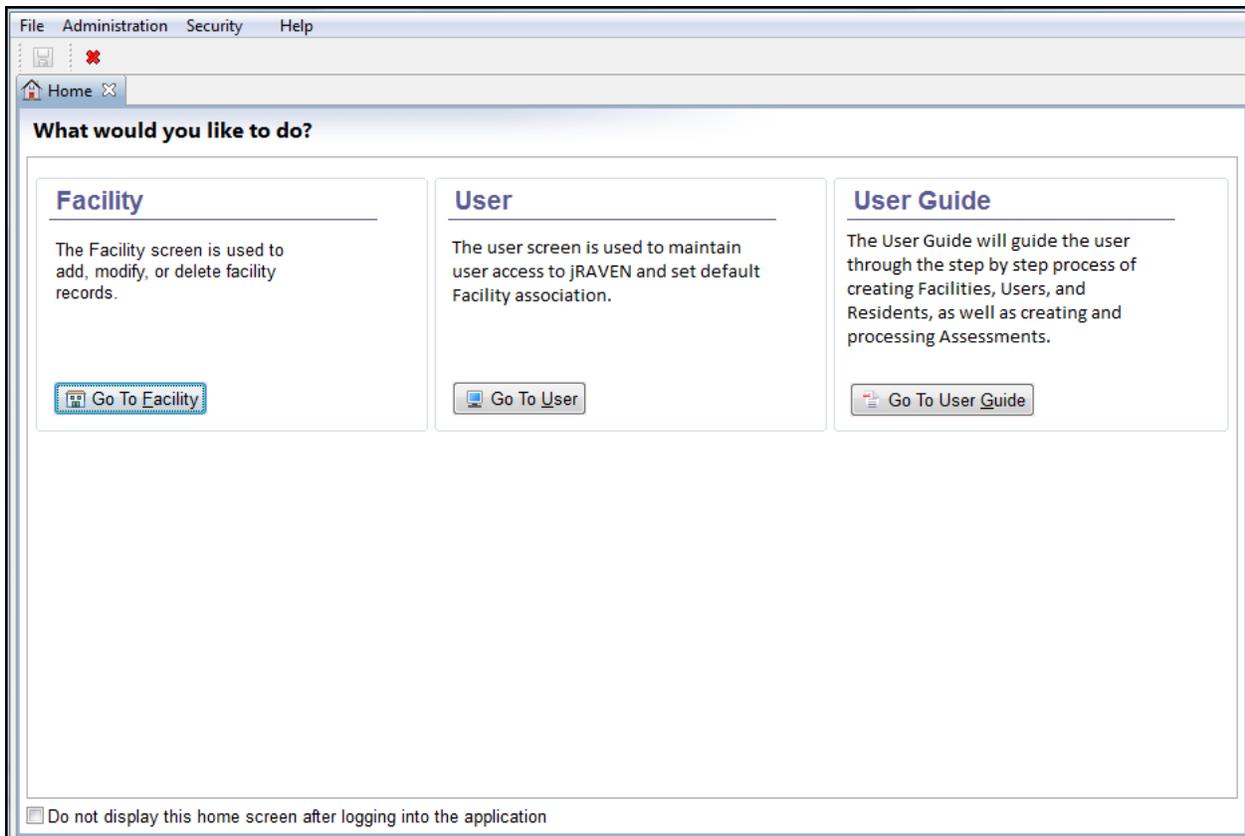
What was the name of your first pet?

What size shoe do you wear?

What is your favorite season of the year?

What is your favorite movie?

7. Click OK. The OK button will not activate until the user enters a minimum of six answers and tabs off the sixth field.
8. The jRAVEN Welcome screen displays.



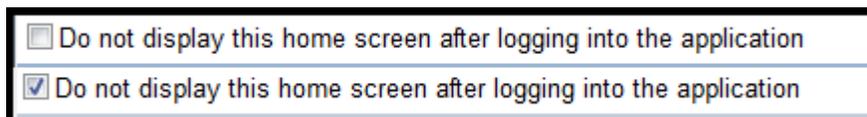
Once the user has successfully logged in, additional facilities, users, residents and assessment information may be added, based on [user roles](#).

Home Screen

The first screen to be displayed is the jRAVEN Application Welcome screen. This screen will, by default, contain the Home Screen which is based on the User's assigned User ID.

Home screen Default

At the bottom of the Home Screen, there is one 'Do not display...' check box. By default the check box will be unchecked (top illustration), indicating that the user would like to display the Home Screen each time they successfully log into the application.



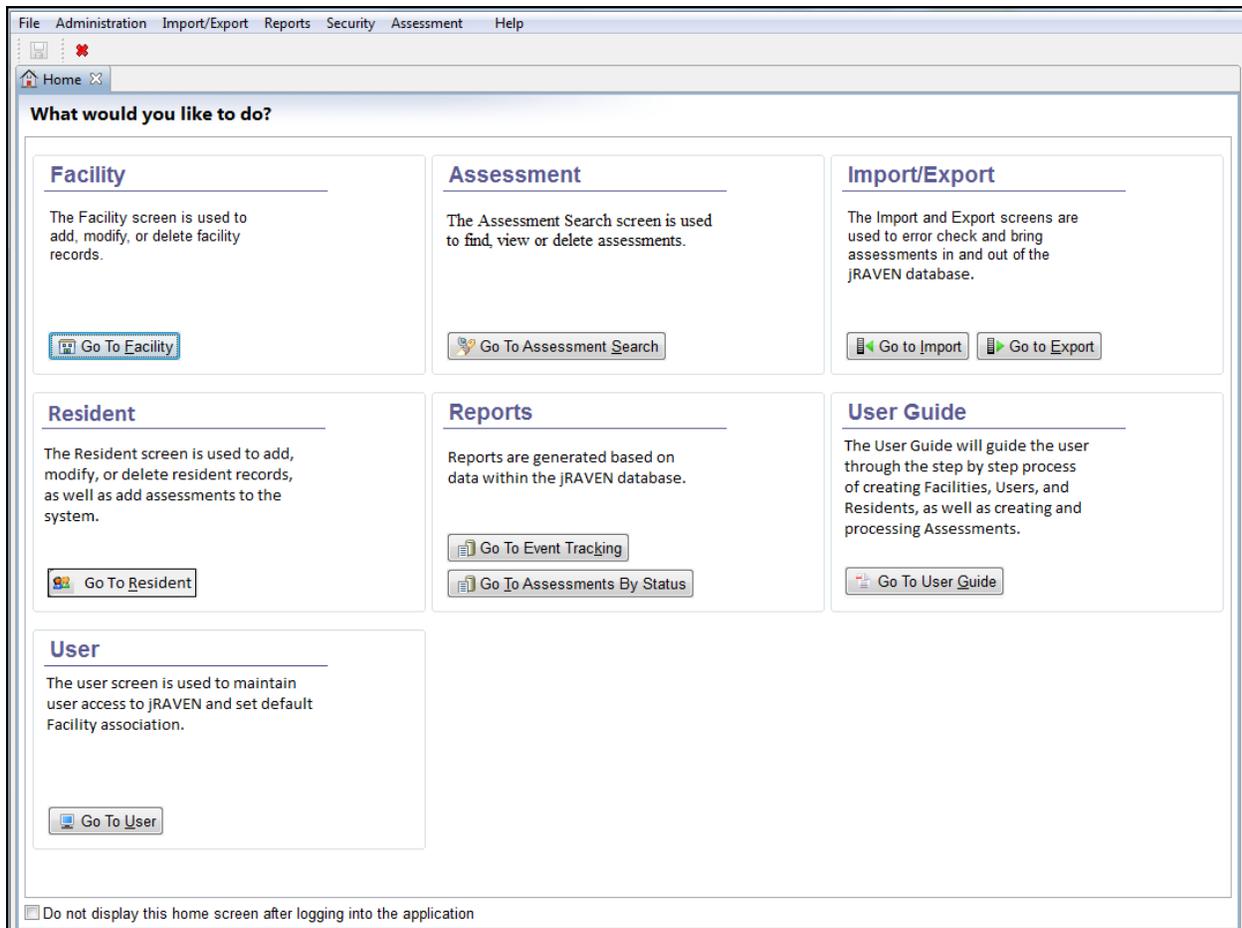
The User may check the check box (second row of illustration) to indicate that they would NOT like to display the Home Screen each time they successfully login. If the User wishes to uncheck this option they can navigate to the Help menu and select Home Screen. This will return the user to the Home Screen where settings may be changed if desired.

Available links Per User Type

System Administrator

The System Administrator will have access to the following:

1. The Menu items and their drop down options: File, Administration, Import/Export, Reports, Security, Assessment, and Help.
2. The “Go To” action buttons:
 - a. Facility - The Facility Screen is used to add, modify, or delete Facility records.
 - b. Assessment - The Assessment Search screen is used to find, view or delete assessments.
 - c. Import/Export - The Import and Export screens are used to error check and bring assessments in and out of the jRAVEN database.
 - d. Resident - The Resident screen is used to add, modify, or delete resident records, as well as add assessments to the system.
 - e. Reports - Reports are generated based on data within the User Tool database.
 - f. User Guide - The User Guide will guide the user through the step by step process of creating Facilities, Users, and Residents, as well as creating and processing Assessments.
 - g. User - The User screen is used to maintain user access to jRAVEN and set default Facility association.



Default User

The Default User will have access to the following:

1. The Menu items and their drop down options: File, Administration, Security, and Help.
2. The “Go To” action buttons:
 - a. Facility – The Facility screen is used to add, modify, or delete facility records.
 - b. User – The user screen is used to maintain user access to jRAVEN and set default facility association.
 - c. User Guide – The User Guide will guide the user through the step by step process of creating Facilities, Users, and Residents, as well as creating and processing Assessments.

Data Entry User

The Data Entry User will have access to the following:

1. The Menu items and their drop down options: File, Administration, Reports, Security, Assessment, and Help.

2. The “Go To” action buttons:
 - a. Facility - The Facility screen is used to modify existing Facility records.
 - b. Resident - The Resident screen is used to add or modify resident records, as well as add Assessments to the system.
 - c. Assessment - The Assessment Search screen is used to find, view or delete Assessments.
 - d. Reports - Reports are generated based on data within the jRAVEN database.
 - e. User Guide - The User Guide will guide the user through the step by step process of creating Facilities, Users, and Residents, as well as creating and processing Assessments.

View Only User

The View Only User will have access to the following:

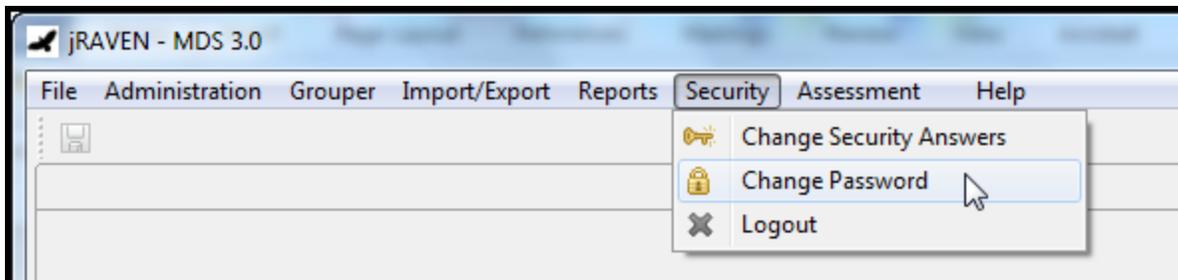
1. The Menu items and their drop down options: File, Reports, Security, Assessment, and Help.
2. The “Go To” action buttons:
 - a. Assessment - The Assessment Search screen is used to find and view Assessments.
 - b. Reports - Reports are generated based on data within the jRAVEN database.
 - c. User Guide - The User Guide will guide the user through the step by step process of creating Facilities, Users, and Residents, as well as creating and processing Assessments.

Passwords

User passwords may be changed at any time.

Complete the following steps to change a password:

1. Login to jRAVEN
2. Select the Change Password option from the Security drop down on the toolbar.

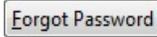


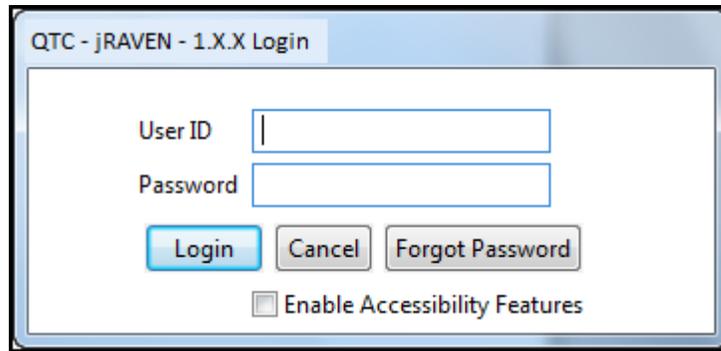
3. The Change Password screen displays. Password rules are as follows:
 - a. The new password and the confirmed new password must match.
 - b. The new password must be at least 8 characters long.

- c. The new password must be no more than 20 characters long.
- d. The new password must not contain any space.
- e. The new password must not contain the User ID, First Name, Last Name, or Email.
- f. The new password must not begin with a number.
- g. The new password can only contain a maximum of 3 repetitive characters.
- h. The new password must contain at least one for each of the following type of characters:
 - i. Upper-case Character: A-Z
 - ii. Lower-case Character: a-z
 - iii. Number: 0-9
 - iv. Special Character: &~`!-@#\$\$%^*()_+={}[]\|;'"<>.,?/
- i. The new password must not match any of the user's most recent 6 passwords.
- j. The new password will be set to expire in 60 days.

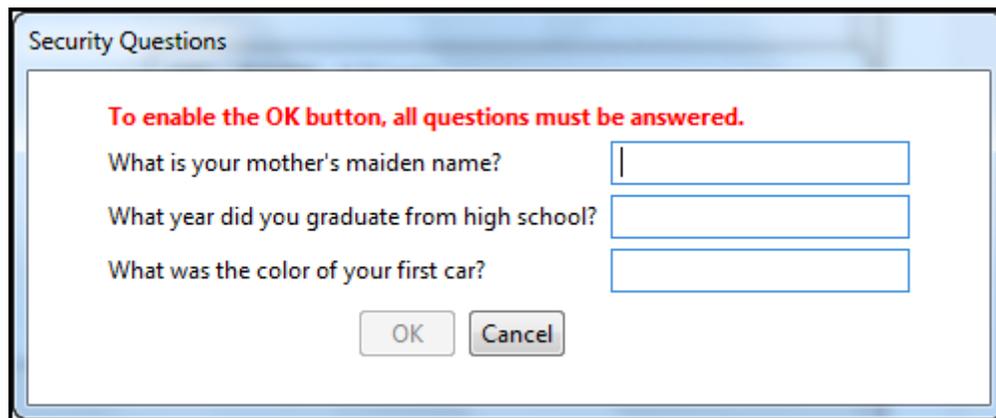
- 4. Enter the current password in the Password box.
- 5. Enter a new password in the New Password box.
- 6. Enter the new password again in the Confirm New Password box.
- 7. Click Change Password. Click Cancel to not change the password.

Forgot Password

On the login screen, enter the User ID and click the Forgot Password  button.



Three randomly selected Security Questions will display.

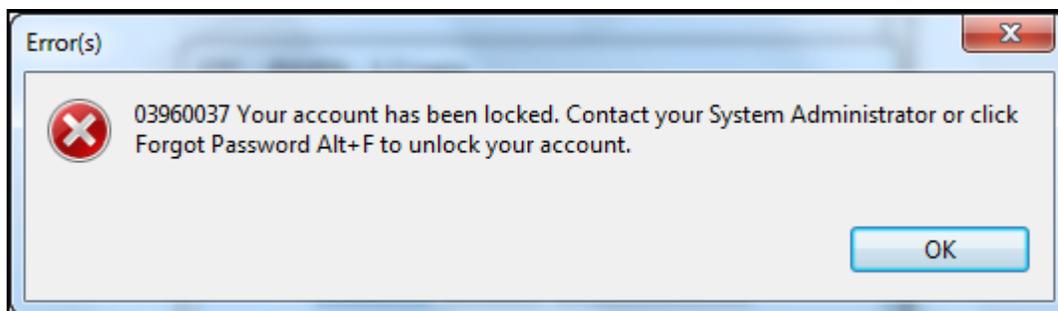


Answer the security questions correctly. Click OK to continue to the Change Password screen. Click Cancel to return to the login screen.

User Account Locked

The following message will display if a user account becomes locked:

- 03960037 Your account has been locked. Contact your System Administrator or click Forgot Password Alt+F to unlock your account. Select OK to close the message.



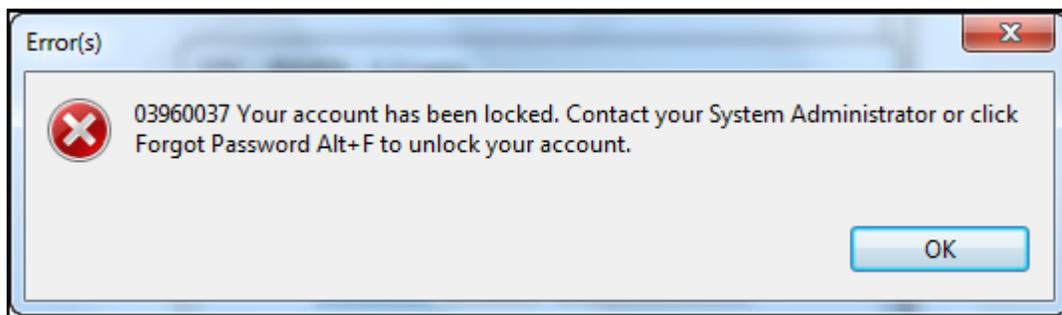
Follow the instructions for 'Forgot Password' to unlock the account. Security questions must be answered and a new password must be created to continue or the System Administrator can reset the account using the following steps:

1. The System Administrator must log in.
2. On the User screen, select the user that has a locked account (displays in bold in the User Summary section).
3. Check the 'Reset Password/Unlock The Account' checkbox
4. Click the Save  icon. The user account is unlocked with the password reset to the user name.

System Administrator Account Locked

If a System Administrator account becomes locked, the same message will display.

- 03960037 Your account has been locked. Contact your System Administrator or click Forgot Password Alt+F to unlock your account. Select OK to close the message.



Follow the instructions for 'Forgot Password' to unlock the account.

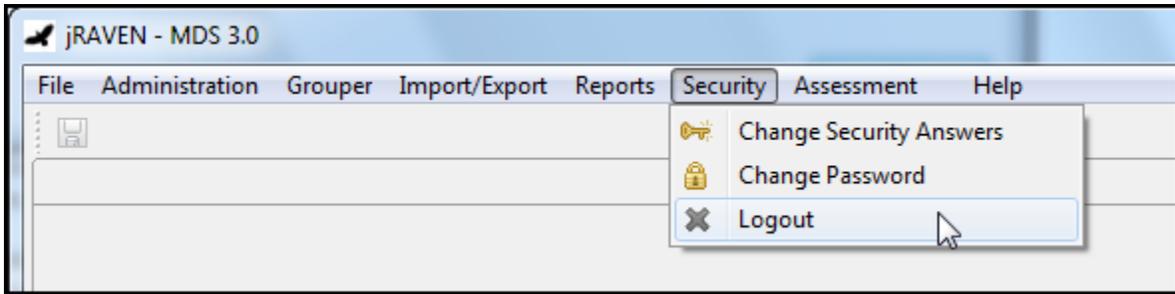
NOTE: Security questions must be answered and a new password must be created to continue.

A second System Administrator may log in and reset the account by following the steps as described above.

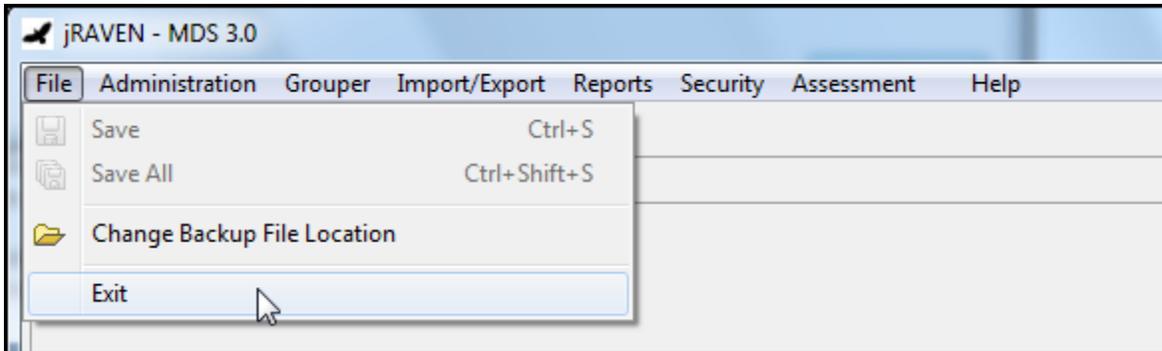
If the account cannot be unlocked using one of these options, contact the Help Desk for assistance. The Help Desk can utilize a secure password reset tool to unlock a system administrator account.

Logout

To log out and return to the login screen, select the Logout option from the Security drop down on the toolbar.



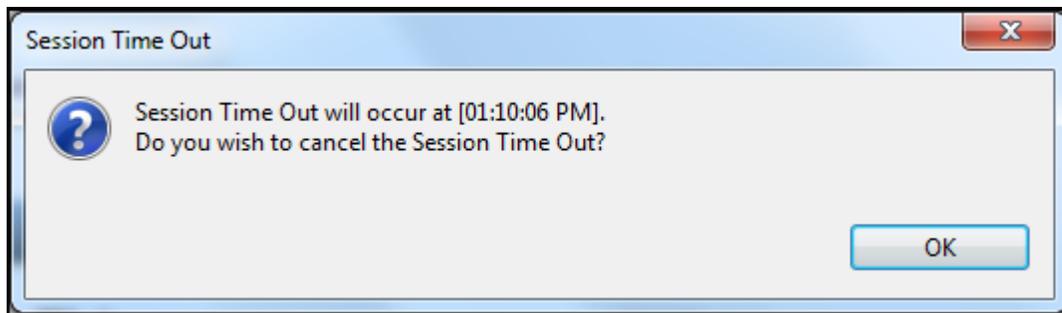
To close jRAVEN, select the Exit option from File drop down on the tool bar.



jRAVEN can also be closed by selecting the red X  icon in the top right corner of the screen.

Session Time Out

To assist with keeping data secure in jRAVEN, if at any time during data entry there is no activity by the user for ten minutes, a warning will be issued that the system will time out in five minutes.



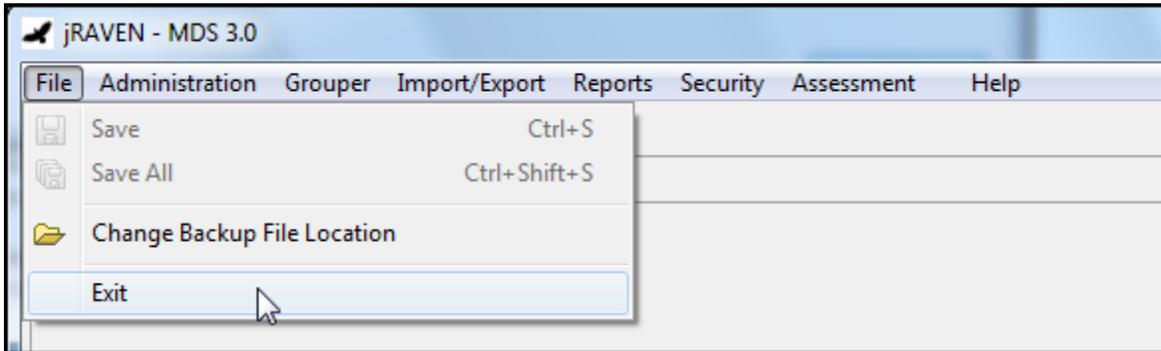
To continue with the session, the user may click OK. If the user does not click OK, jRAVEN will close and return to the log in screen after 15 minutes of inactivity.

Database Backup

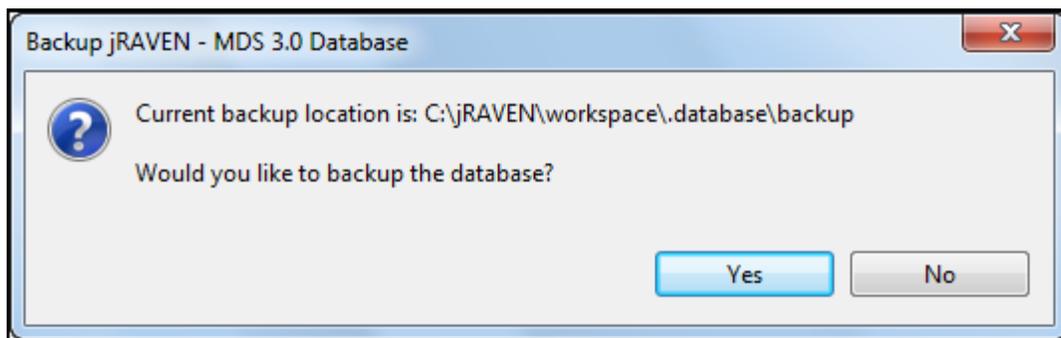
jRAVEN creates a backup of the database when the application is closed following an active session.

Complete the following steps to close and backup data:

1. Select the Exit option from the File drop down on the toolbar.



2. The Backup jRAVEN Database message displays. The current backup location is displayed.



3. Choose one of the following options.
4. Click Yes to back up the database and close jRAVEN.
5. Click No to close jRAVEN without backing up the database.

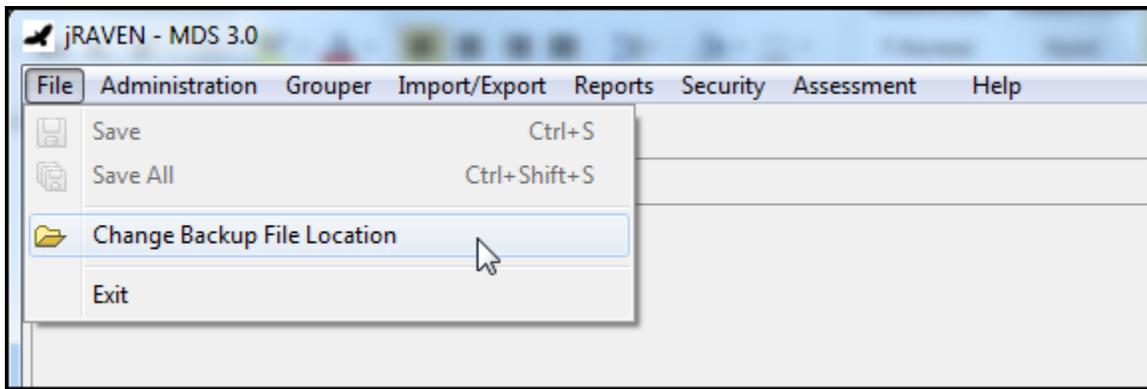
If a backup has not occurred in the last seven days, jRAVEN will automatically backup the database when the application is closed.

Changing the Backup File Location

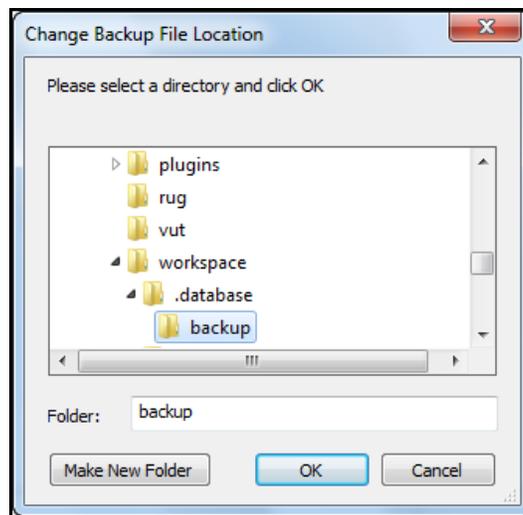
The default location for the backup database is located in a database/backup folder where the application is installed. Only System Administrators may change the location where the backup will be stored.

Complete the following steps to change the location where the backup will be stored:

1. Select the Change Backup File Location option from the File drop down on the toolbar.



2. The Change Backup File Location window displays with the current backup location highlighted.



3. Select the desired backup location.
4. Choose one of the following options.
5. Click OK to set the location and close the screen.
6. Click Cancel to close the window without changing the location of the backup files.

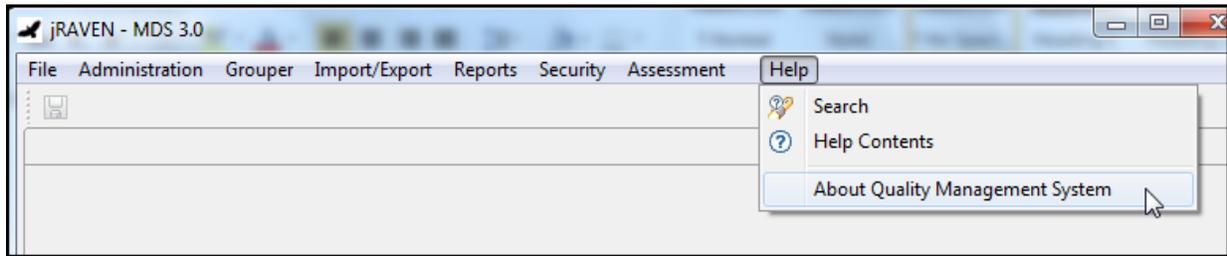
Restore Data

In the event of data loss, System Administrator users may perform a restore from a prior database backup.

A database restore requires the assistance of the QIES help desk (1-800-339-9313 or help@qtso.com).

Version Verification

Information about the version of jRAVEN currently installed can be found by selecting 'About Quality Management System' from the Help menu.

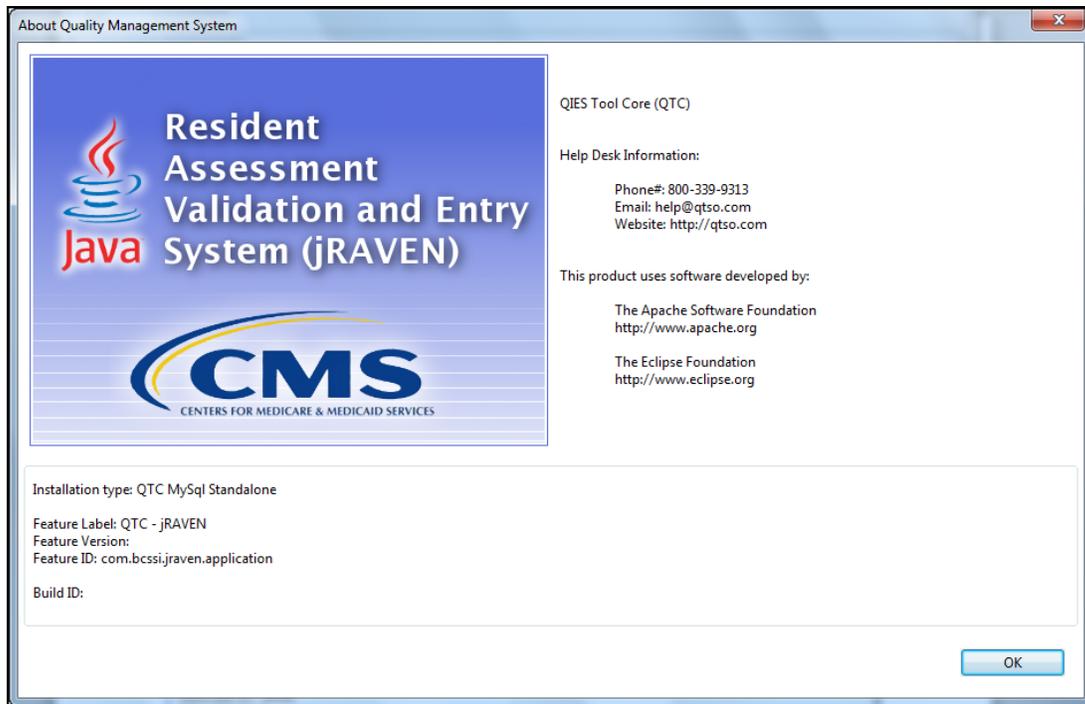


Feature Label (jRAVEN) and Feature Version (1.x.x) display in the lower left side of the screen as follows:

- **Installation type: QTC MySQL Standalone or Client**
- **Feature Label: QTC - jRAVEN**
- **Feature Version: X.X**
- **Feature ID: com.bcssi.jraven.application**
- **Build ID: #**

Help Desk Information displays on the right side of the screen as follows:

- **QIES Tool Core (QTC)**
- **Help Desk Information:**
- **Phone#: 800-339-9313**
- **Email: help@qtso.com**
- **Website: http://qtso.com**
- **This product uses software developed by:**
- **The Apache Software Foundation**
- **http://www.apache.org**
- **The Eclipse Foundation**
- **http://www.eclipse.org**



When the jRAVEN application is accessed and the computer running jRAVEN has an internet connection, the application will compare the version currently installed with the version available on the QJES Technical Support Office (QTSO) website. If a new version of jRAVEN is available, a message will display directing the user to the QTSO website to download the latest version.

Facility Setup

For optimization of the skip patterns and/or edits, it is recommended that data be entered in the order the questions appear on the screen. Entering data out of order can cause unexpected results.

The Facility Screen allows users, based on their [user roles](#), to setup and modify facilities. The term “facility” refers to a nursing home or swing bed.

The screen displays in two columns:

Facility Summary (on the left)

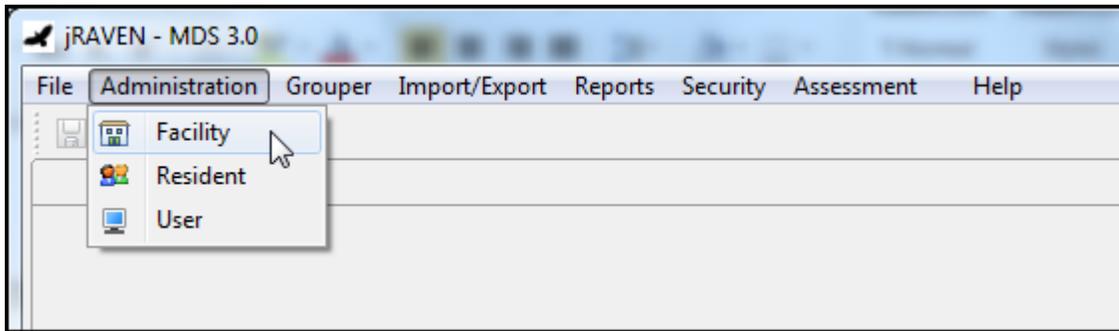
Facility (on the right)

All facility data entry is done in this section.

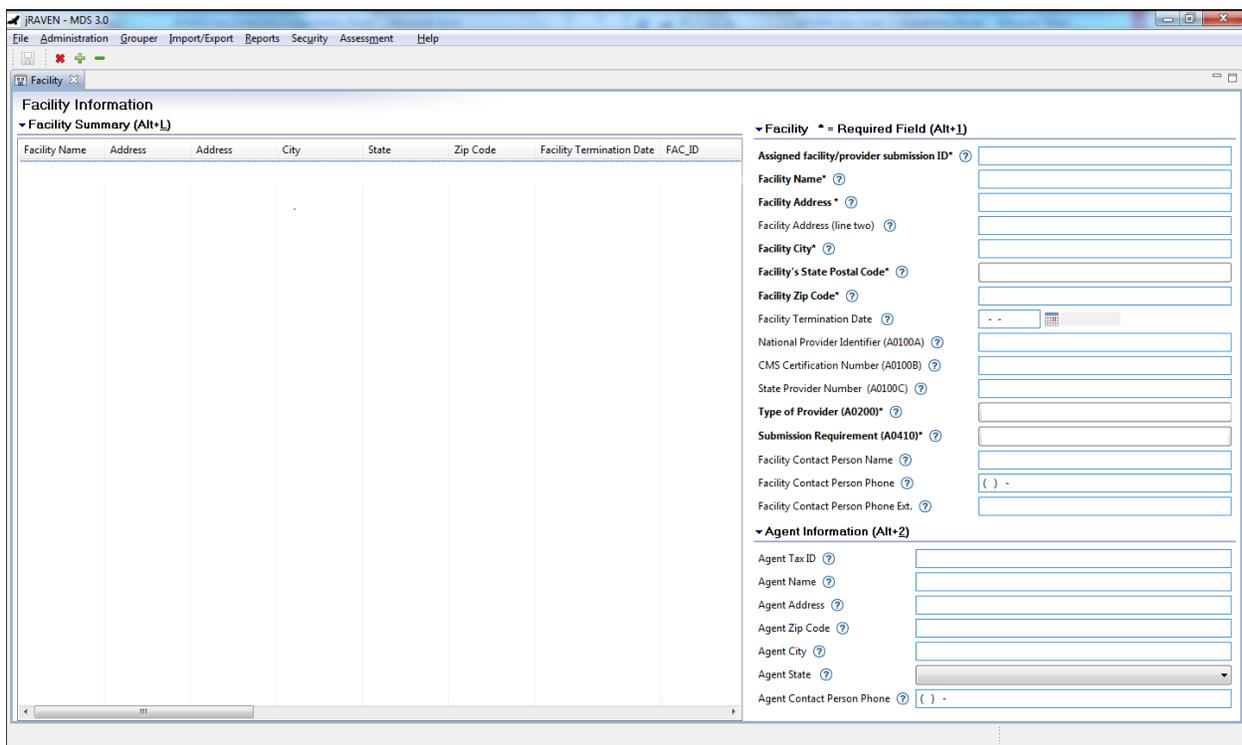
Add Facility

Complete the following steps to create a new facility:

1. Select the Facility option from the Administration drop down on the toolbar.



2. The Facility Screen displays:



3. Enter facility information into the appropriate fields. Required fields display on the screen in bold type with an asterisk. The required fields are as follows:

- a. Assigned facility/provider submission ID*
- b. Facility Name*
- c. Facility Address *
- d. Facility City*
- e. Facility's State Postal Code*
- f. Facility Zip Code*
- g. Type of Provider (A0200)*
- h. Submission Requirement (A0410)*

4. After facility information has been entered, click the Save  icon. Saved facility information will display in the Facility Summary section on the left side of the screen.
5. To add additional facilities, click the New  icon. Enter data and click the Save  icon.

NOTE: A0410 - Submission requirement is selected on the Facility Screen and applies to all assessments associated with the Facility. A0410 may be modified for an individual assessment when the assessment is added. For assistance with A0410, refer to the [SUB_REQ Values](#) section of this document.

Modify a Facility

Complete the following steps to modify an existing facility.

1. Locate and highlight the facility in the summary section.
2. Make the appropriate changes on the right side of the screen.
3. Click the Save  icon.

Delete Facility

Complete the following steps to delete a facility:

1. Locate and highlight the facility in the summary section.
2. Click the Delete  icon.
3. Deletions cannot be made if residents have already been created under the facility.

User Setup

There must always be at least one active System Administrator. It is highly recommended that there be two System Administrators.

For optimization of the skip patterns and/or edits, it is recommended that data be entered in the order the questions appear on the screen. Entering data out of order can cause unexpected results.

The User screen allows users, based on [user roles](#), to setup new users and modify users.

The screen displays in two columns:

User Summary (on the left)

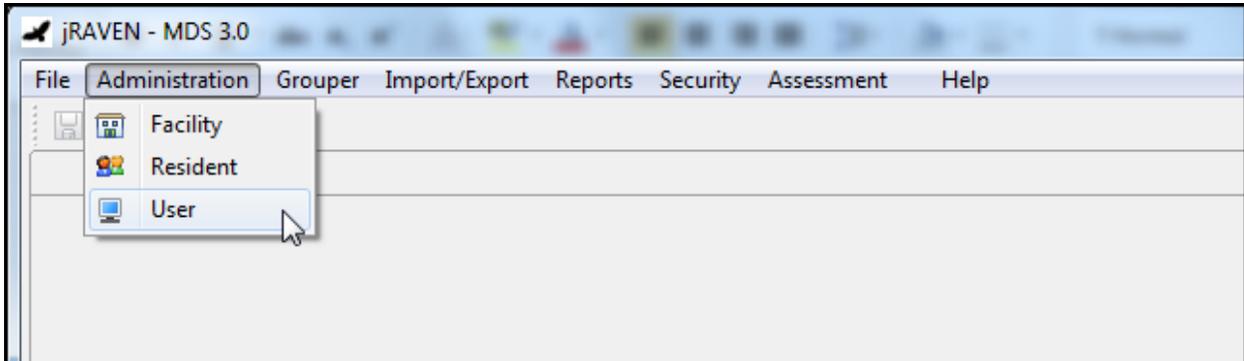
User Detail (on the right)

All user data entry is done in this section.

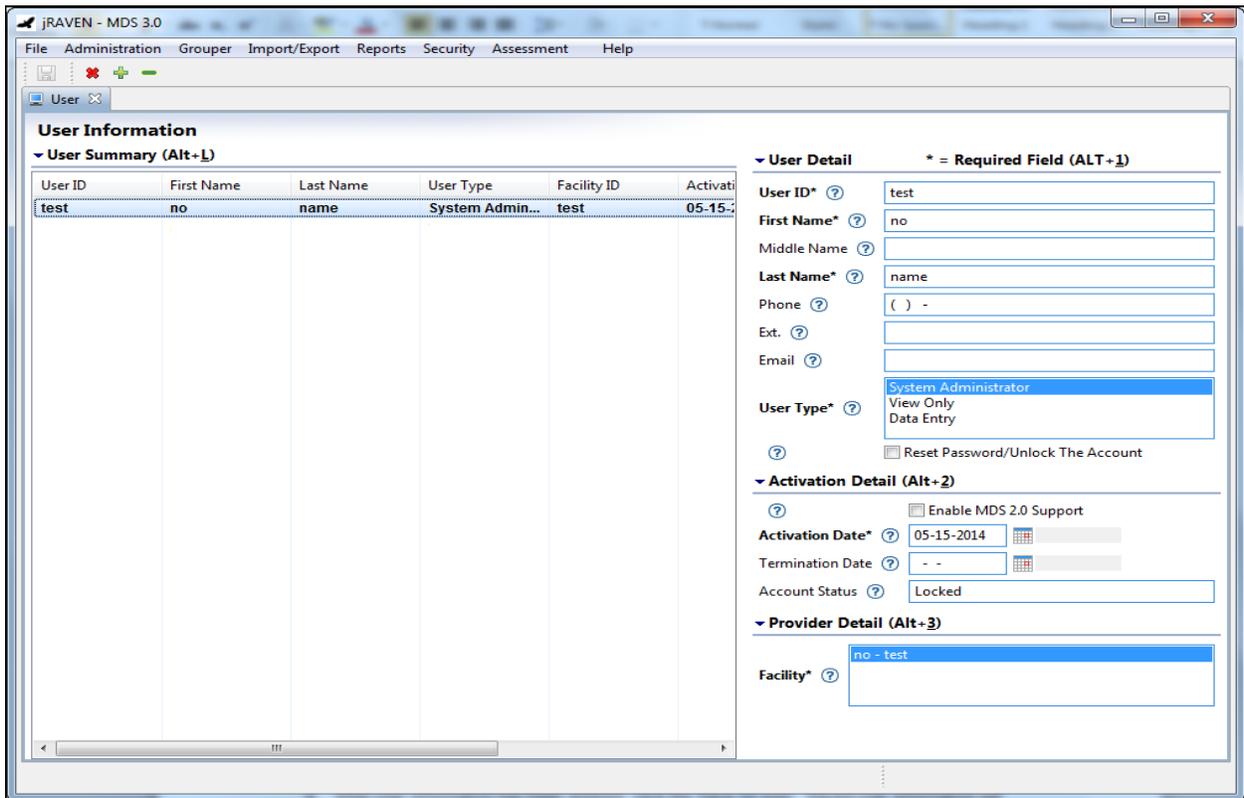
Add a User

Complete the following steps to add a new user:

1. Select the User option from the Administration drop down on the toolbar.



2. The User Information screen displays.



3. Enter user information into the appropriate fields. Required fields display on the screen in bold type with an asterisk. The required fields are as follows:
 - a. User ID*
 - b. First Name*
 - c. Last Name*
 - d. User Type*

- e. Activation Date*
 - f. Facility*
4. After user information has been entered, click the Save  icon. Saved user information will display in the User Summary section on the left side of the screen.
 5. To add additional users, click the New  icon. Enter data and click the Save  icon.

Modify an existing user

Complete the following steps to modify an existing user:

1. Locate and highlight the user in the summary section.
2. Make the appropriate changes on the right side of the screen.
3. Click the Save  icon.

Delete a user

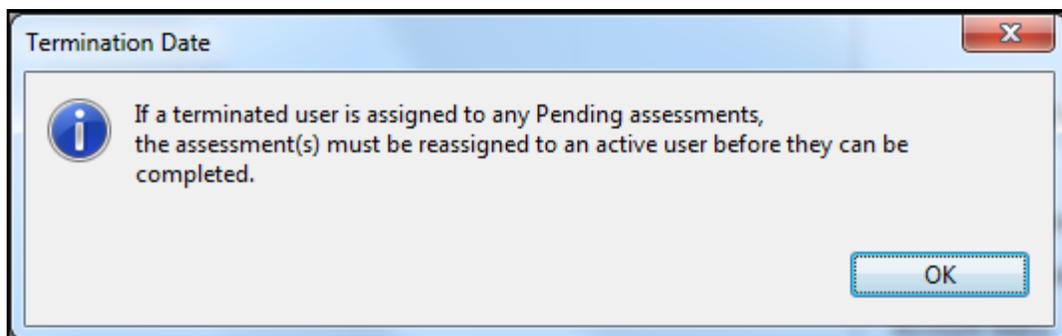
Complete the following steps to delete a user:

1. Locate and highlight the user in the summary section.
2. Click the Delete  icon.

Deletions cannot be made if user has updated records.

Termination Date

A Termination Date should only be entered if an active user is no longer valid (e.g., no longer works for the facility). If a Termination Date is entered for a user with pending assessments, a Termination Date message box displays advising pending assessments should be reassigned to an active user.



If there is only one System Administrator and that person needs to terminate his/her position, another System Administrator must be set up prior to enter the Termination Date for the existing System Administrator.

User Types

User types available in jRAVEN include System Administrator, Data Entry and View Only. To enhance security of data in the application, each user type has a different level of access.

The following table provides a summary of the different user-types and their associated roles within the jRAVEN tool. An “X” is a process that a particular role performs, unless otherwise specified.

Authorization Rights for User-Types

Users/Actions	System Administrator	Data Entry	View only
Assessments - Add/Edit/Delete	Add/Edit/Delete	Add/Edit	N/A
Calculate RUGs	X	X	N/A
Create Inactivation Requests	X	N/A	N/A
Create Modification Requests	X	N/A	N/A
Export Files	X	N/A	N/A
Import Files	X	N/A	N/A
Maintain Facility Information	Add/Edit	Edit Existing records	N/A
Maintain Resident Information	Add/Edit/Hide/Unhide/ Delete	Add/Edit	N/A
Maintain User Information	Add/Edit/Delete	N/A	N/A
Perform Data Entry for all jRAVEN forms	X	X	N/A
Print Assessments (Report)	X	X	X
Set Submission Requirement (Sub_Req)	X	N/A	N/A
Modify Submission Requirement (Sub_Req)	X	X	N/A
View Assessment Data Entry Report	X	X	X

Users/Actions	System Administrator	Data Entry	View only
View Assessments entered by any user	X	X	X
View Event Tracking Report	X	N/A	N/A
View Hidden Residents/Assessments	X	N/A	N/A
View User List	X	N/A	N/A

Users logged in under the Default User ID will only be able to add facilities and users. After successfully adding at least one System Administrator and at least one facility, the user must log out of the application and log in with the newly created User ID.

Resident Setup

For optimization of the skip patterns and/or edits, it is recommended that data be entered in the order the questions appear on the screen. Entering data out of order can cause unexpected results.

The Resident screen allows users, based on [user roles](#), to add, edit, delete and search for residents.

The screen displays in 3 parts:

Search Criteria (top of the screen)

Resident Summary (on the left)

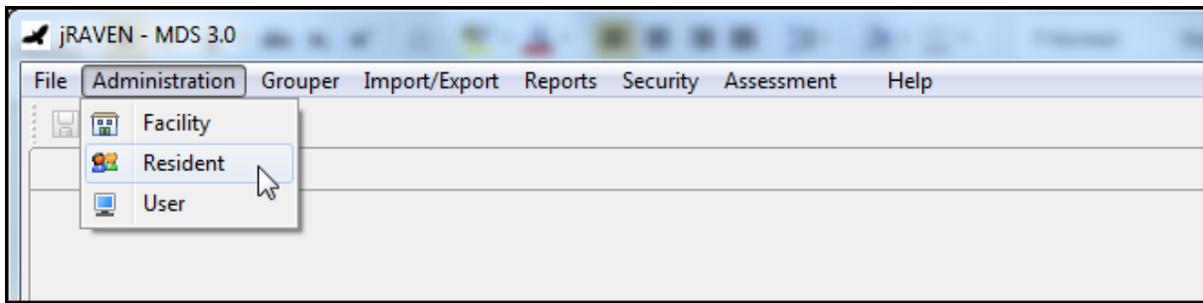
Resident (on the right)

All resident data entry is done in this section.

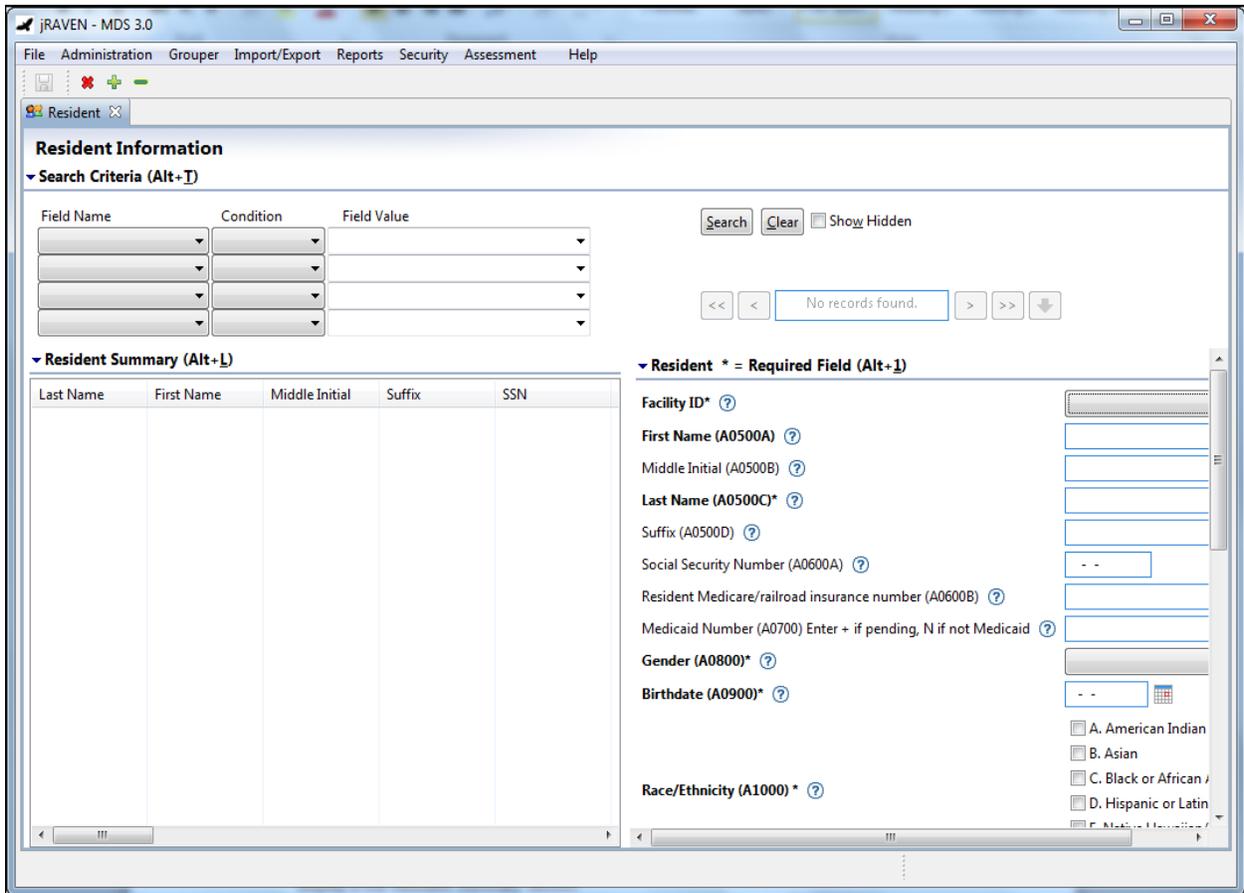
Add Resident

Complete the following steps to add a new resident:

1. Select the Resident option from the Administration drop down on the toolbar.



2. The Resident Information screen displays.



3. Enter resident information into the appropriate fields. Required fields display on the screen in bold type with an asterisk. The required fields are as follows:

- a. Facility ID*
- b. First Name (A0500A)*
- c. Last Name (A0500C)*
- d. Gender (A0800)*
- e. Birthdate (A0900)*
- f. Race/Ethnicity (A1000) *

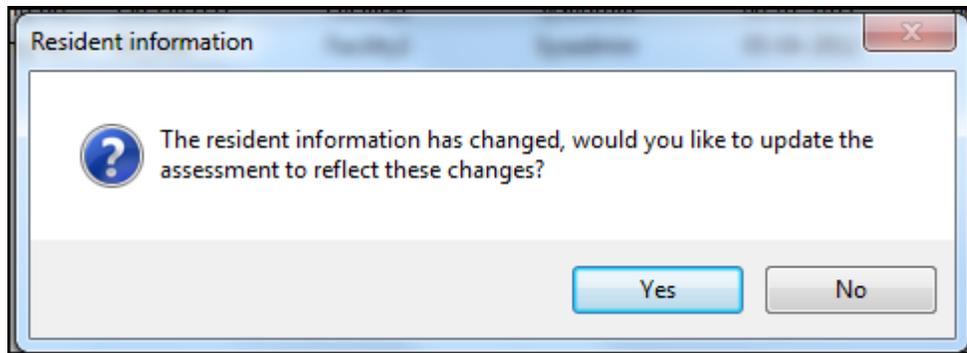
- g. Interpreter needed? (A1100A)*
 - h. Marital Status (A1200)*
4. After user information has been entered, click the Save  icon. Saved resident information will display in the Resident Summary section.
 5. To add additional residents, click the New  icon or the Add Resident  button. Enter data and click the Save  icon.

Modify Resident

Complete the following steps to modify an existing resident:

1. Locate and highlight the resident in the summary section.
2. Make the appropriate changes on the right side of the screen.
3. Click the Save  icon.

NOTE: When creating a correction record, inactivation record, or reset and editing an exported assessment, the following message will display on the Assessment Search screen if provider type, resident first name, resident last name, birth date, gender, SSN, or Race have changed. The user will have the option to update the assessment to reflect the changes made on the Resident screen.



Delete Resident

Complete the following steps to delete a resident:

1. Locate and highlight the resident in the summary section.
2. Click the Delete  icon or the Delete Resident  button.

Deletions cannot be made if one or more assessments have been created for the resident.

Hide Resident Record

The Hide Resident Record field of the Resident column allows Users to hide records that no longer need to be accessed by selecting the Yes, hide record option.



For example, when a Resident is no longer in the Facility and all associated Assessments have been Exported, the User can hide the Resident record.

Search for a Resident

The Search section is at the top of the Resident Information screen.



To retrieve all existing Resident records, click the Search button. If more than 100 Residents exist you can use the arrow keys below the search button to browse page by page or the bold down arrow key to display all Residents.

Complete the following steps to retrieve one or more records based on search criteria:

1. Select criteria from the Field Name and Condition list.
2. Enter a Field Value.
3. Click the Search button.
4. Click the Clear button to remove search criteria.

Selecting the box next to Show Hidden will include records marked 'Yes, Hide Record' in the Resident column. The user can then select 'No, do not hide record' on the Hide Resident Record field if they wish to unhide the Resident.

A System Administrator may see duplicate Residents listed in the Resident Summary section if a Resident has been at multiple facilities and the System Administrator has access to all of those facilities.

NOTE: You may experience increased wait time when searching for a large number of Residents due to database encryption.

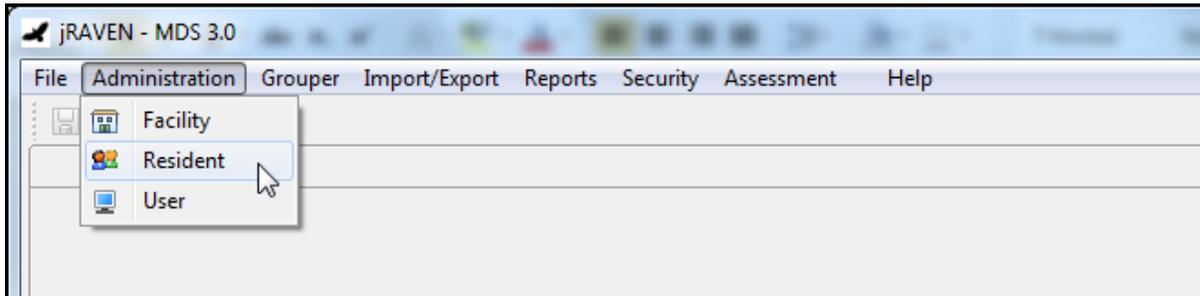
Assessments

For optimization of the skip patterns and/or edits, it is recommended that data be entered in the order the questions appear on the screen. Entering data out of order can cause unexpected results.

Create a MDS 3.0 Assessment

Complete the following steps to create an Assessment:

1. Log in to jRAVEN.
2. Select the Resident option from the Administration drop down on the toolbar.



3. Search for a resident or add a new resident.
4. In the Resident Summary section, double click on a resident or highlight a resident (click on it) and click the Add Assessment button at the bottom of the Resident column.
5. The Add Assessment screen displays.

Assessment

Add Assessment for resident First Name Last Name

* = Required

All enabled questions must be answered to continue.

Date of Admission/Reentry (A1600)*

Federal OBRA Reason (A0310A)*

PPS Assessment (A0310B)*

PPS OMRA (A0310C)*

Swing bed clinical change? (A0310D)*

First since most recent admission/entry? (A0310E)*

Entry/Discharge reporting (A0310F)*

Discharge Date (A2000)*

Assessment Reference Date (observation end date) (A2300)*

Planned/Unplanned Discharge (A0310G)*

Submission Requirement (A0410)* 2 Unit is not Medicare nor Medicaid certified but MDS data is required by the State.

Assessment Date*

Assessor ID*

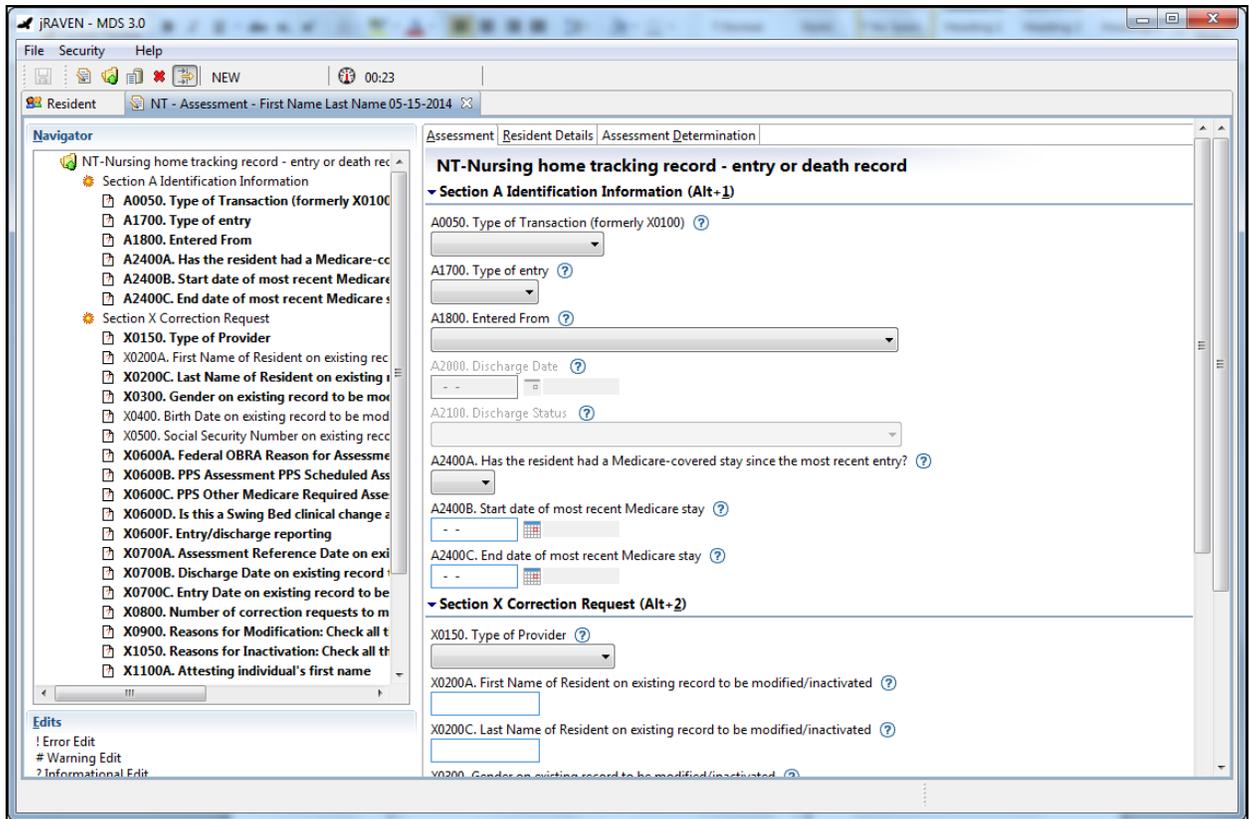
Assessment Type (calculated field)

< Back Next > Finish Cancel

6. Enter the information in the fields as appropriate. Required fields are shown in bold type with an asterisk. When all of the required data has been entered, the assessment type to be completed is calculated and displays in the Assessment Type field.

NOTE: Only item A0410 can be modified at a later time. None of the other items on the Add Assessment screen may be modified after successfully adding the assessment.

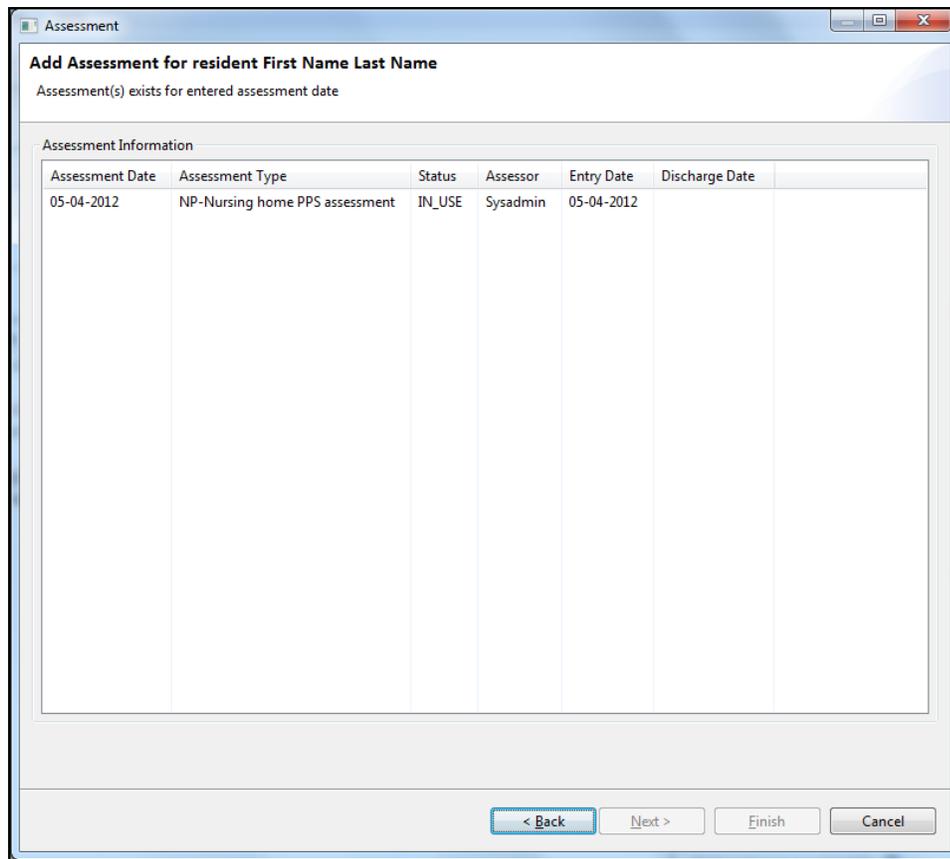
7. Click Finish to continue to the Assessment screen seen below.



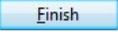
NOTE: Errors and/or warning messages, if applicable, will display in a pop up window before opening the Assessment screen.

- Click the OK  button to return to the Add Assessment screen to make any necessary changes.
- Click the Cancel  button to return to the Resident Information screen.

If the Next  button enables instead of the Finish button, the information entered on the Add Assessment screen duplicates an already entered assessment. The following screen would then display with a list of duplicate assessments.

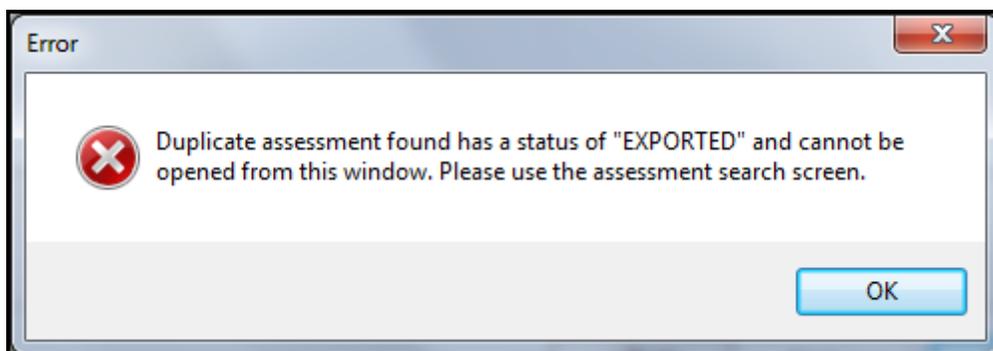


To proceed, highlight the assessment.

- Click the Finish  button to continue with data entry of that assessment.
- Click Cancel  to return to the Resident screen.

If the assessment is already in an EXPORTED status, the following message will display:

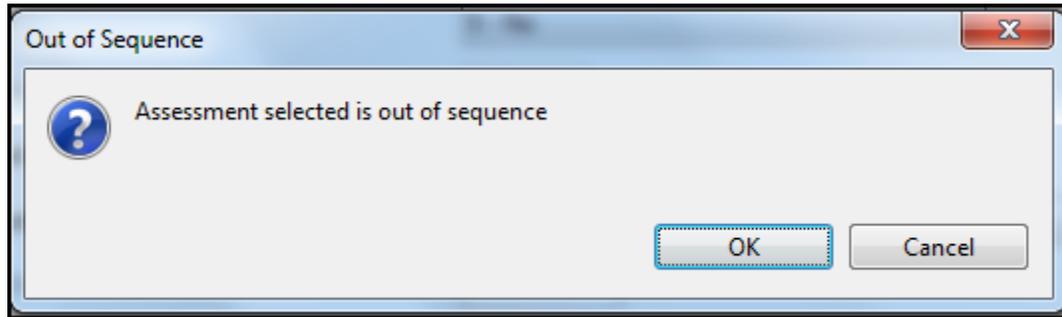
- Error – Duplicate assessment found has a status of “EXPORTED” and cannot be opened from this window. Please use the assessment search screen.



- Click OK . The user will need to navigate to the [Assessment Search](#) screen to modify the assessment.

If an assessment is out of sequence, the following warning message will display:

- Out of Sequence – Assessment selected is out of sequence.



- Click OK  to ignore the message and proceed with creating the assessment
- Click Cancel , to return to the Add/Edit Assessment window and modify that information.

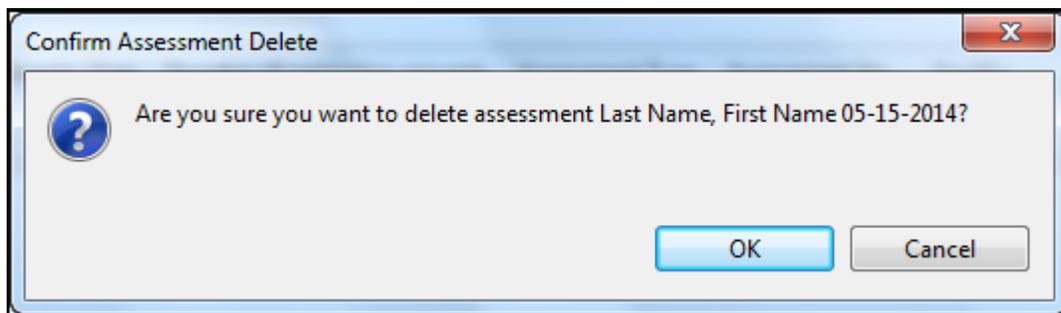
Delete an Assessment

Only a user with a System Administrator role may delete an assessment. Assessments with a status of EXPORTED cannot be deleted.

Complete the following steps to delete an assessment:

1. Search for the desired assessment (see [Search](#) section).
2. Click once on the desired assessment.
3. Click the Delete Assessment button at the bottom of the Assessment Search screen to delete the selected assessment.

The Confirm Assessment Delete message displays.

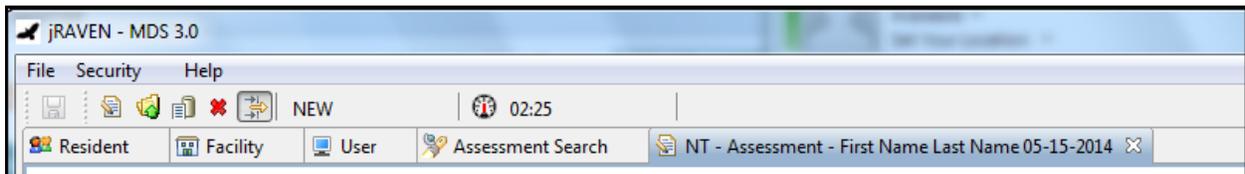


4. Click OK to delete the assessment. Click Cancel to close the message and not delete the assessment.

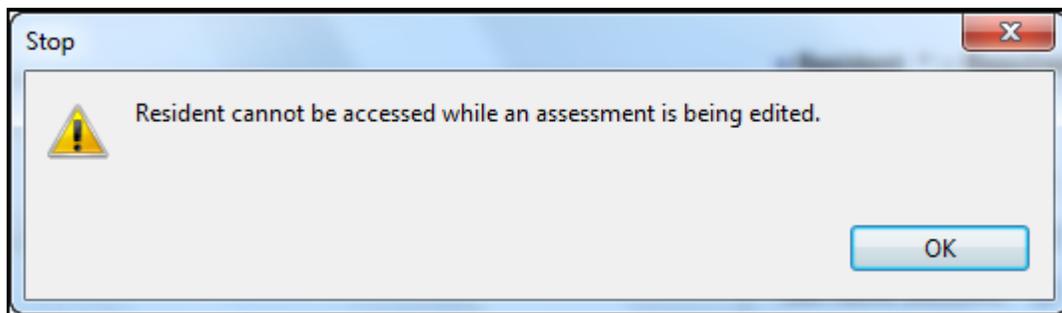
Assessment Screen Navigation

Screen Tabs

Tabs for any open screens (e.g. Facility, Resident, User, Home and Assessment Search) will display below the toolbar at the top of the screen.



When the Assessment screen is active, no other screen may be accessed. If a user tries to view one of the other screens an error message displays.



Click OK to close the error and return to the Assessment screen.

The Assessment tab displays the assessment type, resident name and assessment date.

Navigator

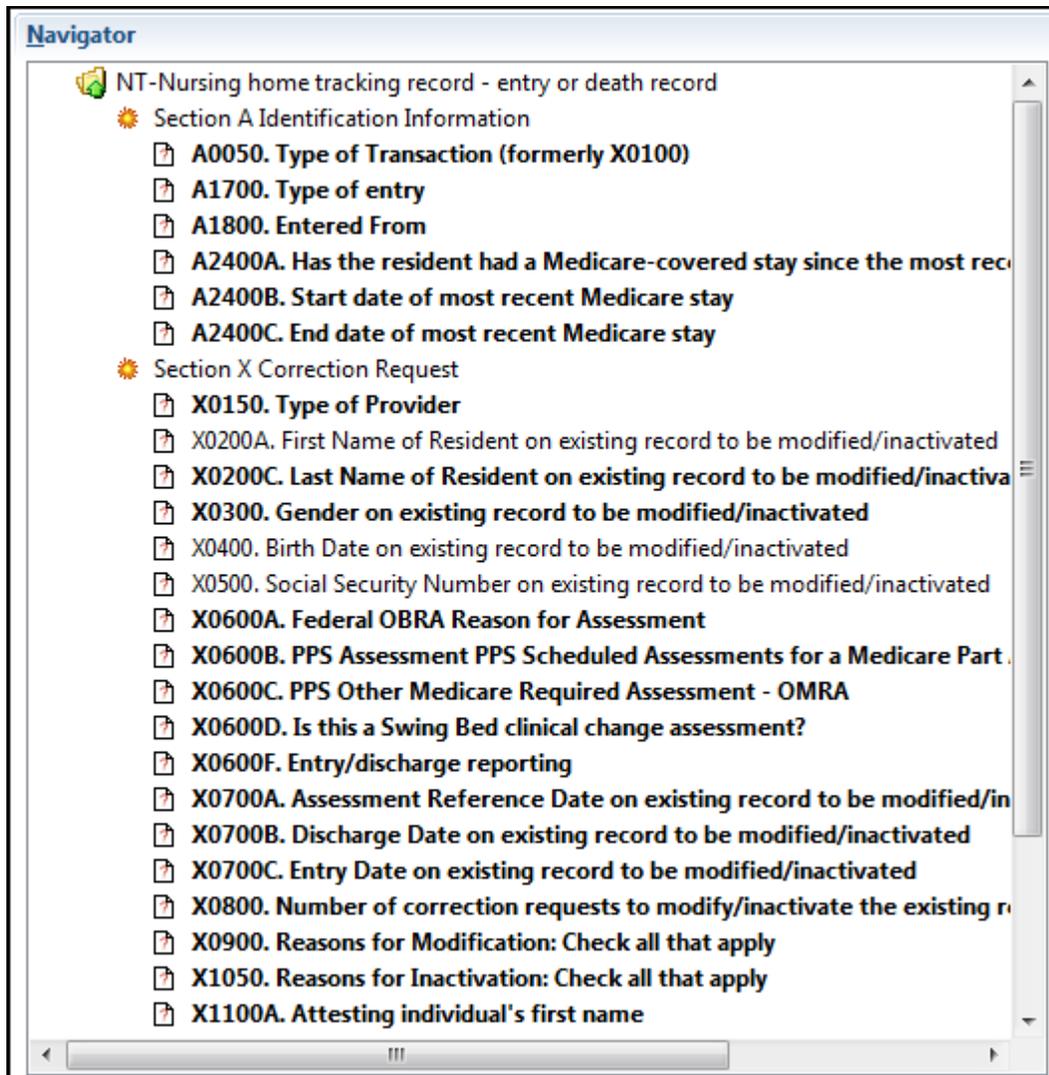
The Navigator is located in the top left corner of the assessment screen.

Items included in an assessment display in a collapsible "tree" format.

As questions are answered, they are removed from the tree.

The Show/Hide Answered Questions  icon in the toolbar at the top of the screen will also change the display of the tree.

Clicking on an item in the tree will directly place the cursor in the selected field inside the assessment.



Edits

Edits are located in the bottom left corner of the assessment screen.

Errors, warnings and information edits are found in the data display.

Clicking on an edit message will move the cursor to the appropriate field within the assessment.

Some errors will present a pop up message and must be addressed when displayed in order to proceed.

Edits

! Error Edit
Warning Edit
? Informational Edit

! [-3676]:Invalid value for this item. [^(H0100Z)
! [-3676]:Invalid value for this item. [^(K0510B2)
! [-3819]:If the following items in Column 1 are active, they must not equal [^]: K0510A1 and
! [-3676]:Invalid value for this item. [^(J1800)
! [-3676]:Invalid value for this item. [^(K0510A2)
! [-3676]:Invalid value for this item. [^(O0300A)
! [-3523]:a) If B0100=[0], then all active items from E0100A through E0300 must not equal ['
! [-3676]:Invalid value for this item. [^(H0100C)
! [-3676]:Invalid value for this item. [^(H0100D)
! [-3676]:Invalid value for this item. [^(H0100A)

Print Error Report

Assessment Tab

Assessment data is entered under the Assessment tab located on the top right side of the assessment screen.

Assessment Resident Details Assessment Determination

NT-Nursing home tracking record - entry or death record

▼ Section A Identification Information (Alt+1)

A0050. Type of Transaction (formerly X0100) ?

A1700. Type of entry ?

A1800. Entered From ?

A2000. Discharge Date ?
 - -

A2100. Discharge Status ?

A2400A. Has the resident had a Medicare-covered stay since the most recent entry? ?

A2400B. Start date of most recent Medicare stay ?
 - -

A2400C. End date of most recent Medicare stay ?
 - -

Resident Details Tab

The Resident Details tab is located on the top right side of the assessment screen.

Resident data is displayed in a view only, non-editable, format.

Assessment	Resident Details	Assessment Determination	
Resident Details			
Last Name	<input type="text" value="Last Name"/>	First Name	<input type="text" value="First Name"/>
Middle Initial	<input type="text"/>	Suffix	<input type="text"/>
SSN	<input type="text"/>	Medicare/railroad number	<input type="text"/>
Medicaid No.	<input type="text"/>	Birthdate	<input type="text" value="11-27-1984"/>
Race	<input type="text" value="F. White"/>	Gender	<input type="text" value="Female"/>
Interpreter needed?	<input type="text" value="No"/>	Preferred Language	<input type="text"/>
Hide Resident Record	<input type="text" value="No,do NOT hide record"/>	Marital Status	<input type="text" value="2. Married"/>
Unique Resident ID Code (if state provides)	<input type="text"/>	Facility Specific Resident ID	<input type="text"/>
Unit	<input type="text"/>	Medical Record Number	<input type="text"/>
Room Number	<input type="text"/>	Preferred Name	<input type="text"/>
Lifetime occupation	<input type="text"/>	Facility document ID	<input type="text"/>
Res. Facility ID	<input type="text" value="no - test"/>		

Assessment Determination Tab

The Assessment Determination tab is located on the top right side of the assessment screen.

Add Assessment screen data is displayed in a view only, non-editable, format.

Assessment	Resident Details	Assessment Determination	
Assessment Determination			
Date of Admission/Reentry (A1600)	<input type="text" value="05-15-2014"/>	Federal OBRA Reason (A0310A)	<input type="text" value="99 - None of the above (formerly)"/>
PPS Assessment (A0310B)	<input type="text" value="99 - None of the above (formerly)"/>	PPS OMRA (A0310C)	<input type="text" value="0 - No"/>
Swing bed clinical change? (A0310D)	<input type="text"/>	First since most recent admission/entry? (A0310E)	<input type="text" value="0 - No"/>
Entry/Discharge reporting (A0310F)	<input type="text" value="01 - Entry record"/>	Discharge Date (A2000)	<input type="text"/>
Assessment Reference Date (observation end date) (A2300)	<input type="text"/>	Planned/Unplanned Discharge (A0310G)	<input type="text"/>
Submission Requirement (A0410)	<input type="text" value="2 Unit is not Medicare nor Medic"/>	Assessment Date	<input type="text" value="05-15-2014"/>

Entering Assessment Data

For optimization of the skip patterns and/or edits, it is recommended that data be entered in the order the questions appear on the screen.

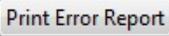
Enter applicable data into the assessment. Required fields will appear bold in the [Navigator](#) portion of the screen.

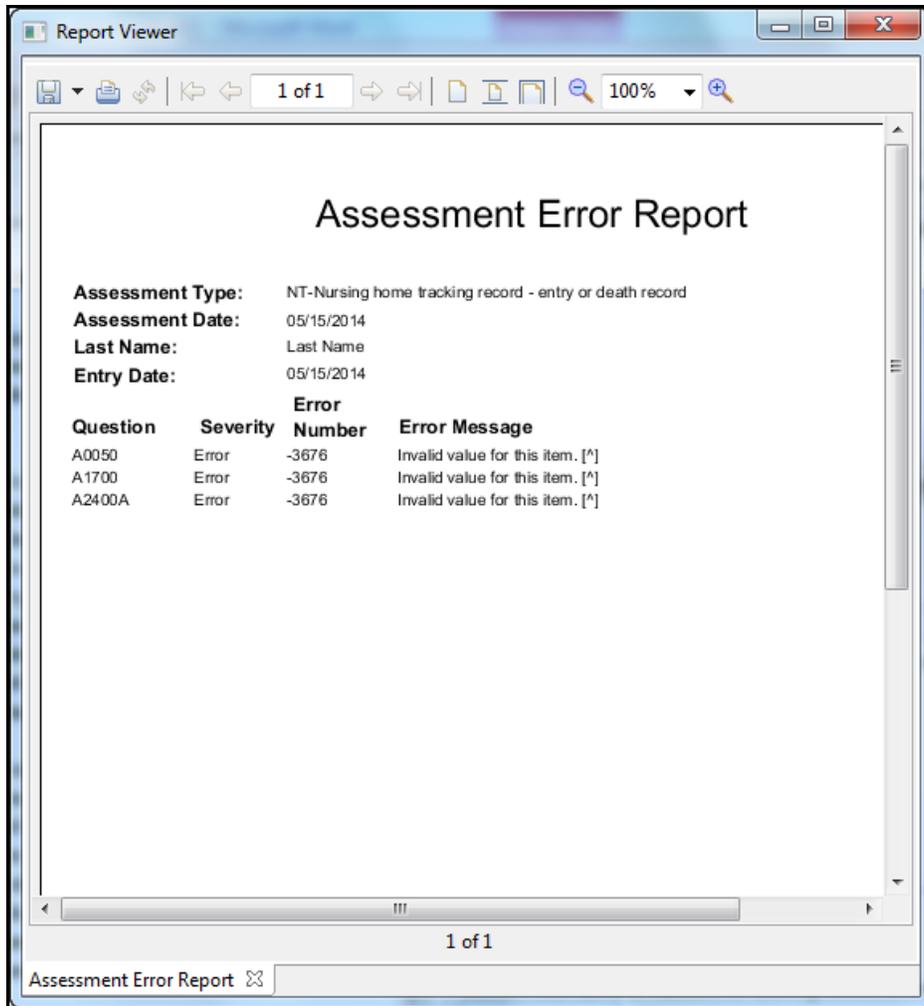
Click the Save and Validate  icon when finished which will validate the assessment and execute the RUG section at the bottom of the assessment. The RUG values are stored in the appropriate fields in Section Z.

Close the assessment.

Edits in an Assessment

Error edits must be corrected before the assessment can be exported. Warning edits provide only a warning. It is up to the user to enter the data appropriately.

Errors, warnings and informational edits found on the data, display in the lower left of the screen. To print the list of edits, click the Print Error Report  button in the Edits section or the Print Assessment Error Report  icon on the toolbar. The Report Viewer displays.

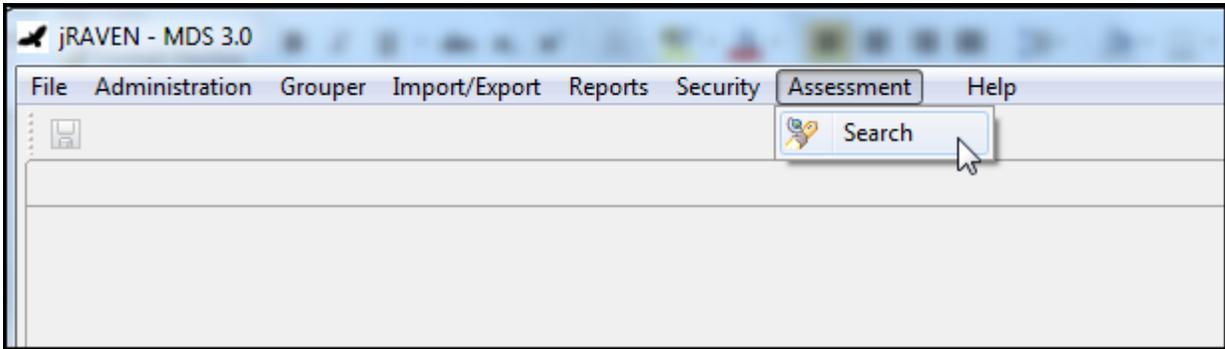


Some edits will present a pop up message and must be addressed when displayed in order to proceed. These edits will not display in the edits listing in the lower left portion of the screen.

Search for an Assessment

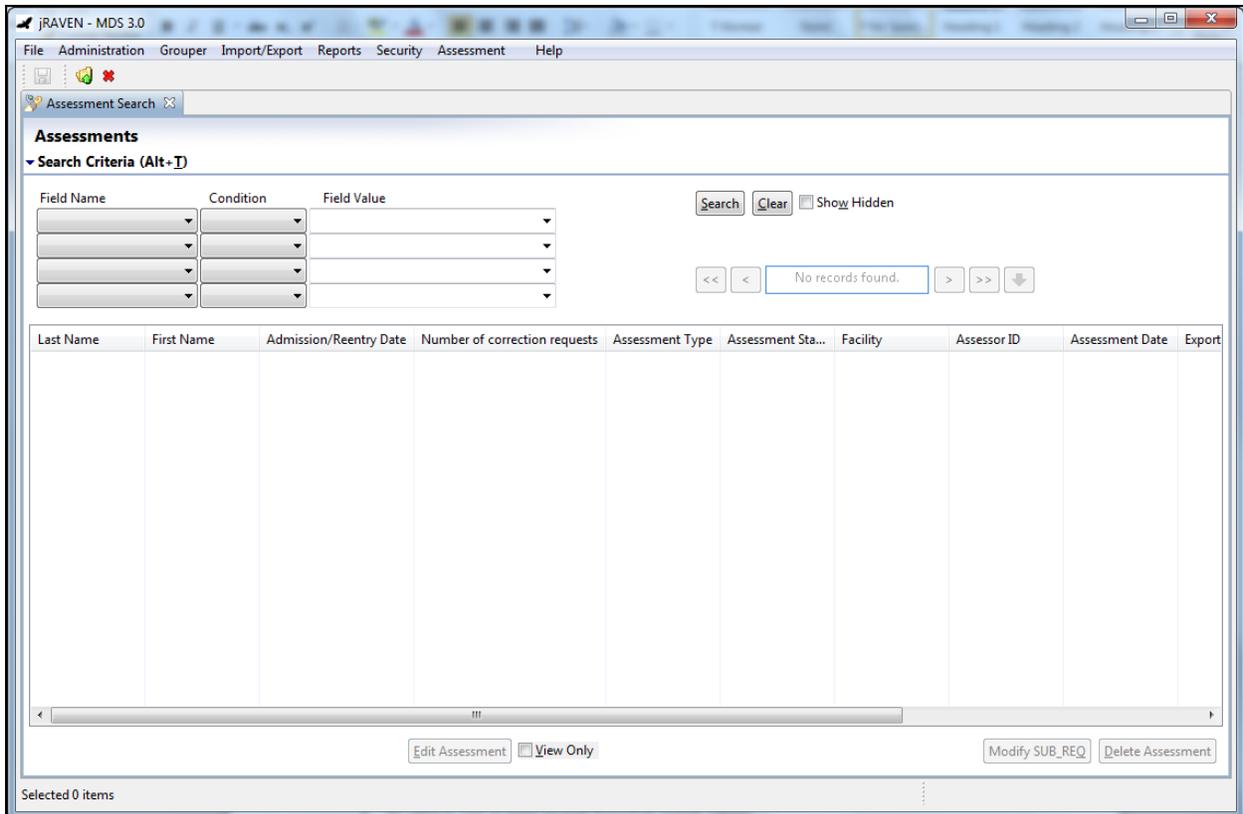
Complete the following steps to search for an assessment:

1. Select the Search option from the Assessment drop down on the toolbar.



The Assessment Search screen displays and contains the following columns:

- Last Name
- First Name
- Admission/Reentry Date
- Number of correction requests
- Assessment Type
- Assessment Status
- Facility
- Assessor ID
- Assessment Date
- Export Date
- Target Date



2. To retrieve all existing assessment records, click the Search button.
3. To retrieve one or more records based on search criteria:
 - a. Select criteria from the Field Name and Condition list.
 - b. Enter a Field Value.
 - c. Click the Search button.
 - d. Click the Clear button to remove search criteria.

Selecting the box next to Show Hidden Show Hidden will include records marked Yes, Hide Record on the Resident screen.

NOTE: You may experience increased wait time when searching for a large number of Assessments due to database encryption.

View Only

Complete the following steps to open an assessment in view only mode:

1. Search for the desired assessment (see [Search](#) section).
2. Click the View Only View Only checkbox at the bottom of the screen.
3. Double click on the desired assessment or click once on the desired assessment and click the View Assessment button at the bottom of the screen.
4. The Assessment screen opens in view only mode.

An assessment in view only mode cannot be modified. If this assessment is closed and the user tries to open another assessment from the Search screen, it will be displayed as view only also. The user will need to uncheck the View Only checkbox to make changes to an assessment.

Status of IN_USE, DATA_ENTRY, Completed or EXPORT_READY

Complete the following steps to edit an existing assessment with a status of IN_USE, DATA_ENTRY, COMPLETED or EXPORT_READY:

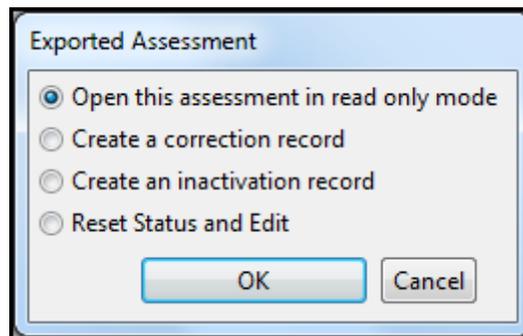
1. Search for the desired assessment (see [Search](#) section).
2. Double click on the desired assessment or click once on the desired assessment and click the Edit Assessment button at the bottom of the page.
3. The Assessment screen opens for editing.
4. Edit the assessment if applicable.
5. If changes are made, click the Save and Validate  icon on the toolbar.

6. Close the assessment.

Status of EXPORTED

Complete the following steps to edit an existing assessment with a status of EXPORTED. Only a user with a System Administrator role may edit an assessment that has been exported:

1. Search for the desired assessment (see [Search](#) section).
2. Double click on the desired assessment or click once on the desired assessment and click the Edit Assessment button at the bottom of the page.
3. The Exported Assessment message box displays.



4. The user will now have the following options:
 - a. Open this assessment in read only mode – Assessment opens and displays all previously selected answers in a view only, non-editable, format. This selection checks the View Only checkbox at the bottom of the Assessment Search screen. All other assessments will be view only until this box is unchecked.
 - b. Create a correction record –Assessment wizard and assessment opens to display all previously selected answers. The reason for assessment can be changed only if the item subset code isn't changed as a result of the corrections. The target date of the assessment can be changed during a correction. If the change in target date results in a different version of data specifications multiple previously answered fields may need to be answered again to comply with the different data specifications.
 - c. Create an inactivation record – The Inactivation Assessment opens. Enter required fields and validate. Once saved, the Assessment Type will be changed to XX-Inactivation record-nursing home or swing bed.
 - d. Reset Status and Edit –Assessment opens and displays all previously selected answers in an editable format.

5. Edit the assessment if applicable.
6. If changes are made, click the Save and Validate  icon on the toolbar.
7. Close the assessment.

Auto-Save Feature

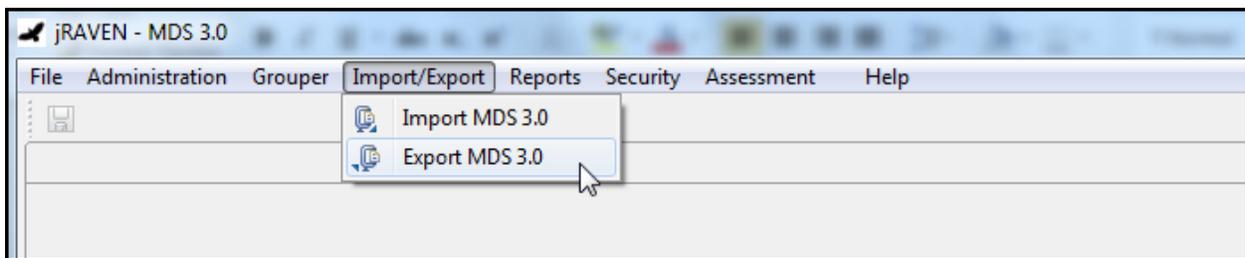
jRAVEN will automatically save updates to information/data within an assessment before the tool times out. This auto-save feature will save all valid and invalid data entered into the assessment. The information will still need to be saved and validated before the assessment can be exported.

Export

The Export Assessments screen allows the user to determine what data is exported.

Complete the following steps to export an assessment:

1. Select the Export option from the Import/Export drop down on the toolbar.



2. The Export Assessments screen displays.
3. Select one of the two Export Types
 - a. 'New Export' (Assessments marked as "Export Ready")

Export Assessments

Export Type
Previous Exports (Assessments marked as "Export Ready" or "Exported")

Submission Type
Product Submission

Export Path
Browse...

Export Name
Test .ZIP (XML)

Export Description
1 assessments.

Previous Exports

Description	Location	Date
1 assessments.		2014-05-15

Previously Exported Assessments

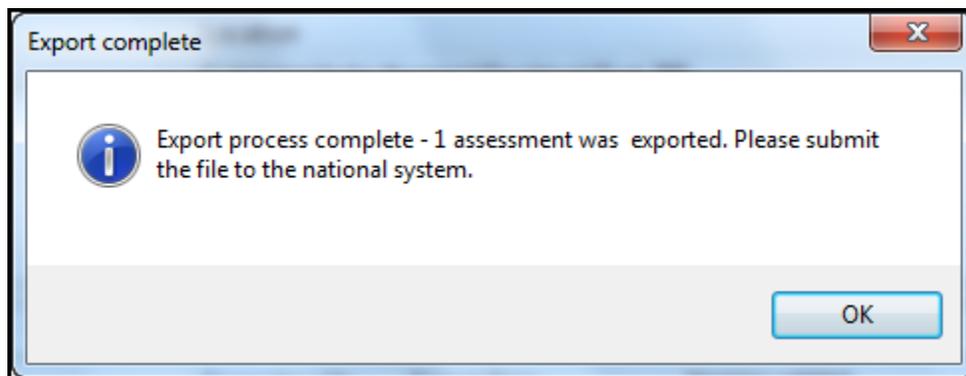
Name	ISC Type	Correction Nu...	Target Date	Z0100A HIPPS	Status
<input type="checkbox"/> Last Name, First Name	NT-Nursing home track...	00	2014-05-15		EXPORTED

Select All Clear Selection Print Assessment List Error Check Export

4. Select the Submission Type 'Product Submission'
5. Select the Export Path. This field is required. This is the location where the exported files will be stored. Click on the Browse button to navigate to the location where the files will be exported to.
6. Select the Export Name. This field is required. Enter a unique file name for the export.
7. Select the Export Description. This field can be used to document details regarding the export.
8. If this is a New Export type, select the checkbox next to the Resident Name to be included in the Export. A list of assessments available to be exported is displayed. A minimum of one selection is required. The assessments must be in "Exported" status to display in this list.

If this is a Previous Export type, select/highlight a Previous Export. A list of assessments available to be exported will be displayed. A minimum of one selection is required. The assessments must be in "Export Ready" or "Exported" status to display in this list.

- a. The Select All button will select all assessments displayed in the list to be included in the export file.
 - b. The Clear Selection button will unselect all assessments previously selected.
9. If desired, select the Print Assessment List button to print a list of assessments included in the file to be exported.
10. Select the Error Check button to validate and/or check for errors on all previously selected assessments. Error results display in a new screen.
- a. Select the Save to File button to save the error report (.txt)
 - b. Click the Close icon in the top right corner to close the report.
11. Select the Export button to export selected assessments for submission.
12. The Export complete message displays to notify the user the process is complete. The location of the exported files displays in parenthesis at the end of the message. The files are ready for submission to the national database.



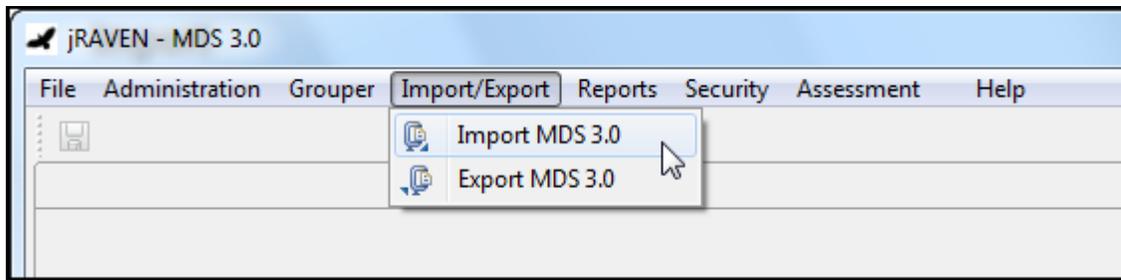
Import

The Import Assessments screen allows the user to determine how data is imported.

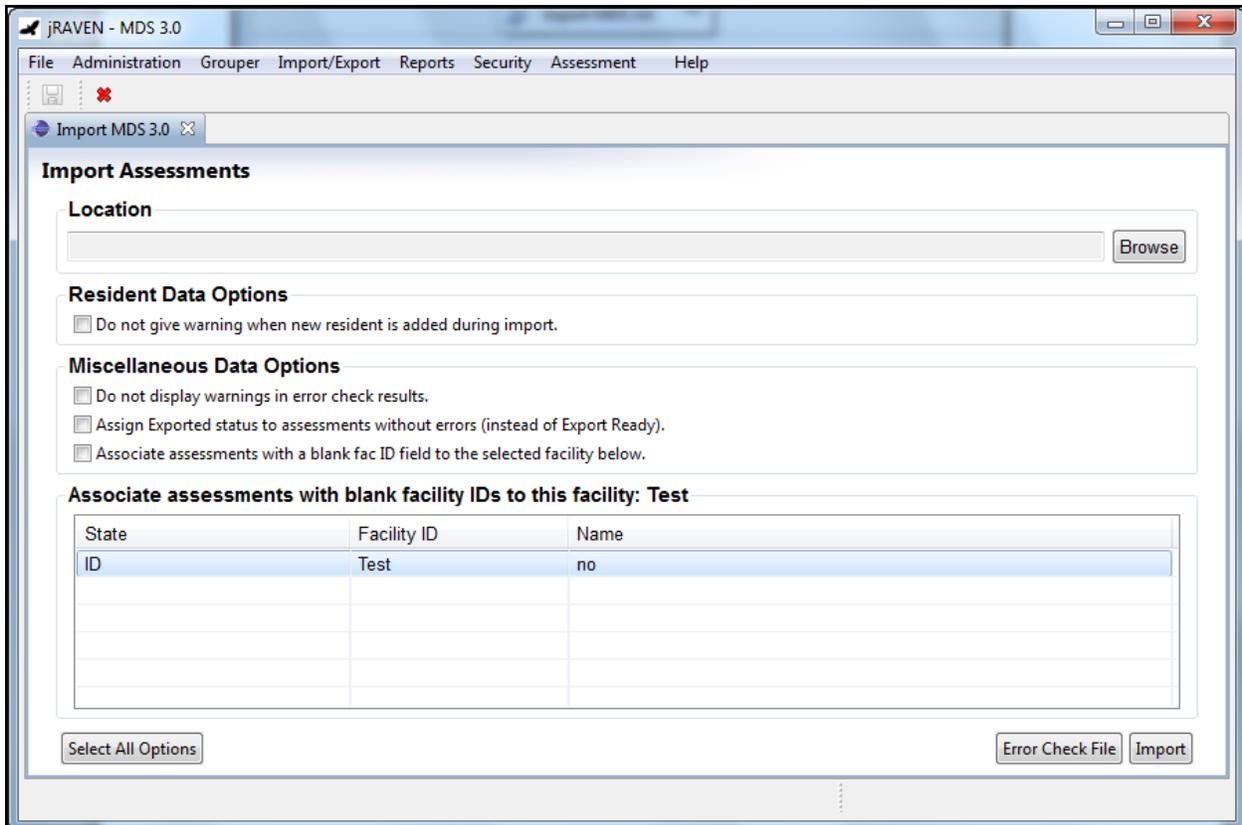
NOTE: You may experience increased wait time when importing large number of assessments due to database encryption.

Complete the following steps to import an assessment:

1. Select the Import option from the Import/Export drop down on the toolbar.



2. The Import Assessment screen displays.



3. Select the Location. Click on the Browse button to navigate to the location of the files to be imported.

Set Preferences

Resident Data Options Checkbox



Do not give warning when new resident is added during import. Selecting this box turns off the warning message usually displayed when a new resident is imported.

Miscellaneous Data Options Checkboxes

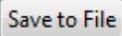
Miscellaneous Data Options

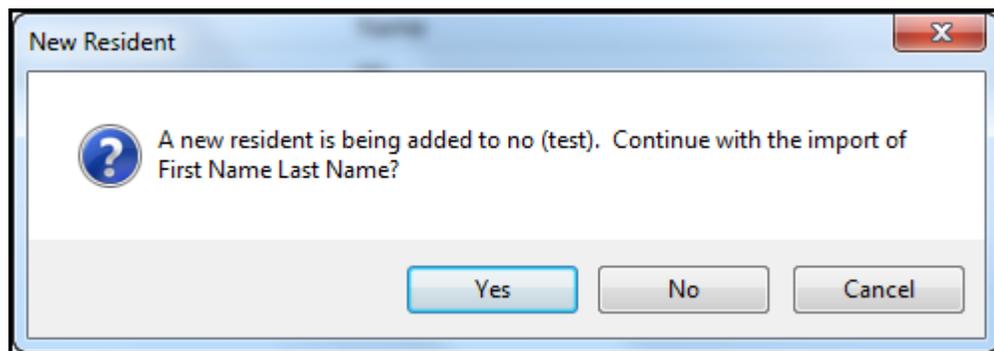
- Do not display warnings in error check results.
- Assign Exported status to assessments without errors (instead of Export Ready).
- Associate assessments with a blank fac ID field to the selected facility below.

Do not display warnings in error check results. Removes warning messages from the error check results report that displays after importing data. Only fatal errors are included in the report.

Assign Exported status to assessments without errors (instead of Export Ready); sets the status of imported assessments to Exported, if the record does not have errors.

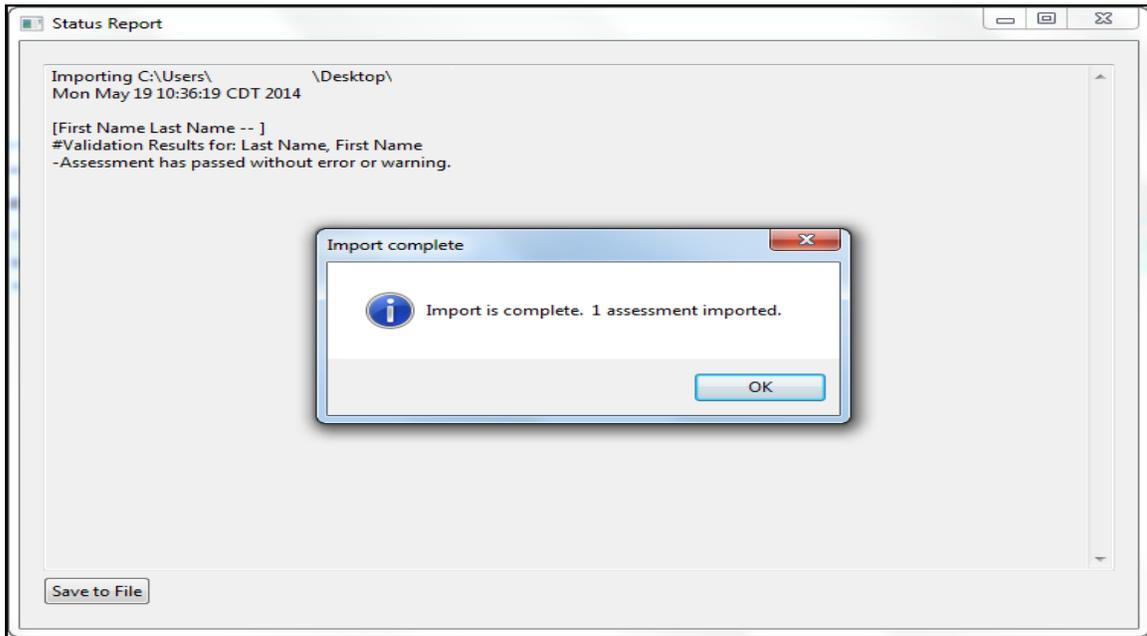
Associate assessments with a blank facility ID field to the selected facility below. Links assessments that are imported without a Facility ID to the facility highlighted in the Associate assessments with blank facility IDs to this facility section.

- Click the Select All Options  button to check or uncheck all checkboxes.
 - Select the Error Check button to validate and/or check for errors on all assessments to be imported. Error results display in a new screen. Select the Save to File  button to save the error report (.txt). Click the Close  icon in the top right corner to close the report.
4. Click the Import  button to import selected assessments into jRAVEN.
 5. A New Resident message displays. This message allows you to choose if you want to continue with the import of the new resident.

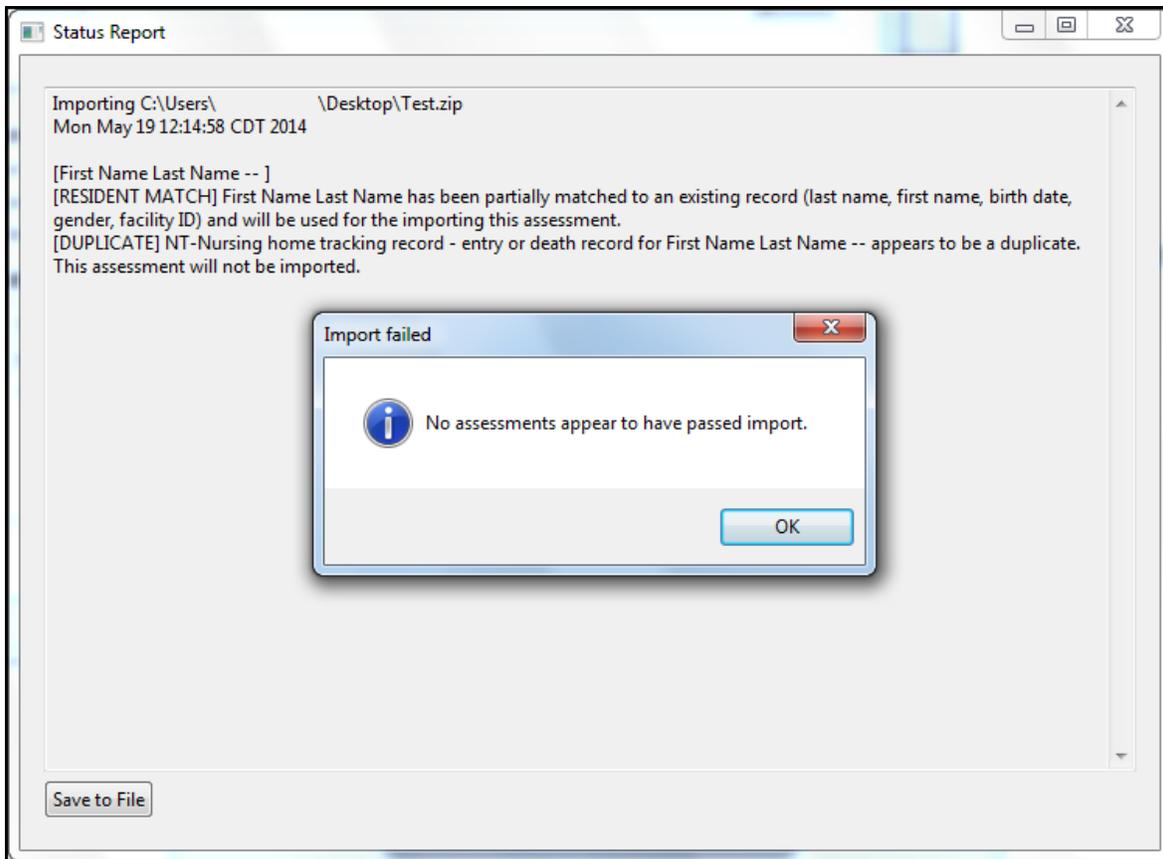


6. Click Yes to continue with the import of the assessment.
7. Click No or Cancel to stop the import process.

- An Import complete message displays as well as a Status Report for all assessments included in the import.



- If no files are successfully imported, the Import failed message box displays along with a Status Report.



10. Click the OK  button on the Import Complete box to view the Status Report.

Reports

jRAVEN reports allow System Administrators to preview and print Assessment information, as well as detail and summary information for both Facilities and Residents.

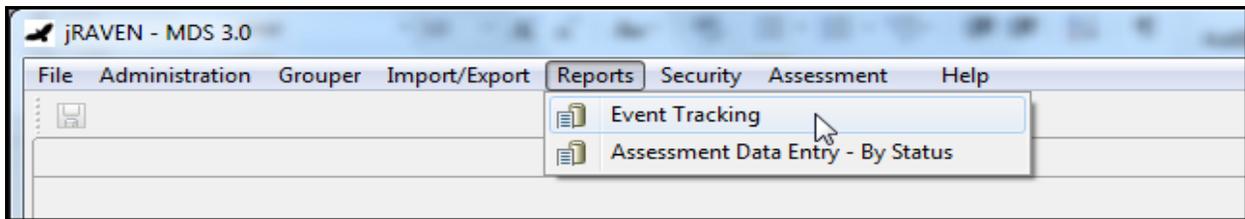
Available jRAVEN Reports are:

- Event Tracking
- Assessment Data Entry – By Status

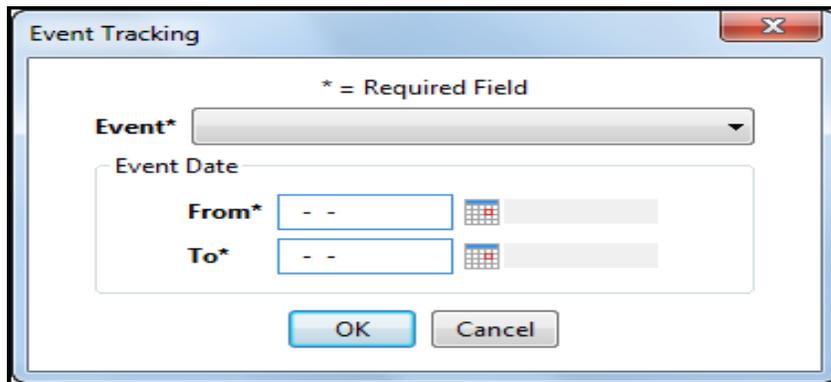
Event Tracking

Complete the following steps to run the Event Tracking report:

1. Select Event Tracking from the Reports drop down on the toolbar.



2. The parameter screen displays.



3. Complete the following required fields which are bold and marked with an asterisk (*):

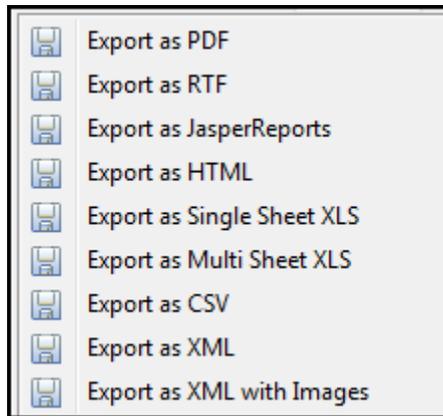
- a. **Event***
- b. **From***
- c. **To***

4. Select the OK  button to generate the report or the Cancel  button to close the parameter screen.

5. The Report Viewer screen opens displaying the generated report.

- a. To print the report, click the Print  icon on the Report Viewer screen.
- b. To save the report, click the Save  icon on the Report Viewer screen.
- c. To export a report, click the arrow next to the Save  icon. Available export values display below:

- Export as PDF
- Export as RTF
- Export as Jasper Reports
- Export as HTML
- Export as Single Sheet XLS
- Export as Multi Sheet XLS
- Export as CSV
- Export as XML
- Export as XML with Images

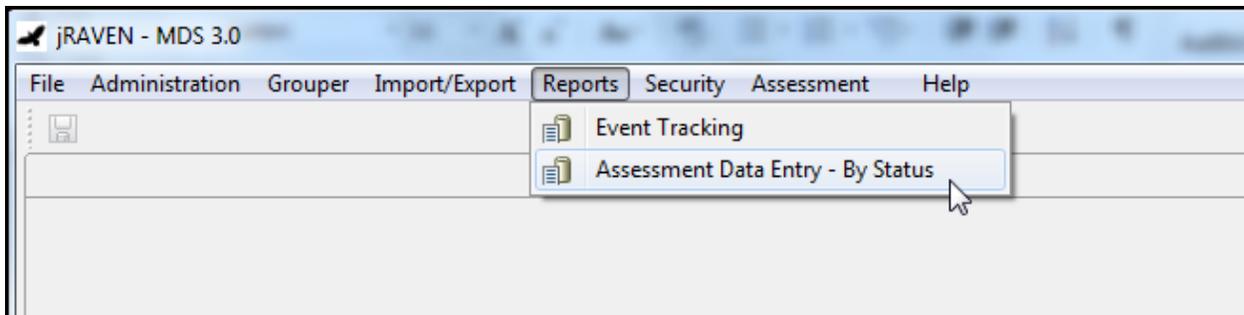


- d. Select an export type.
- e. Select a location to save the report and click Save.

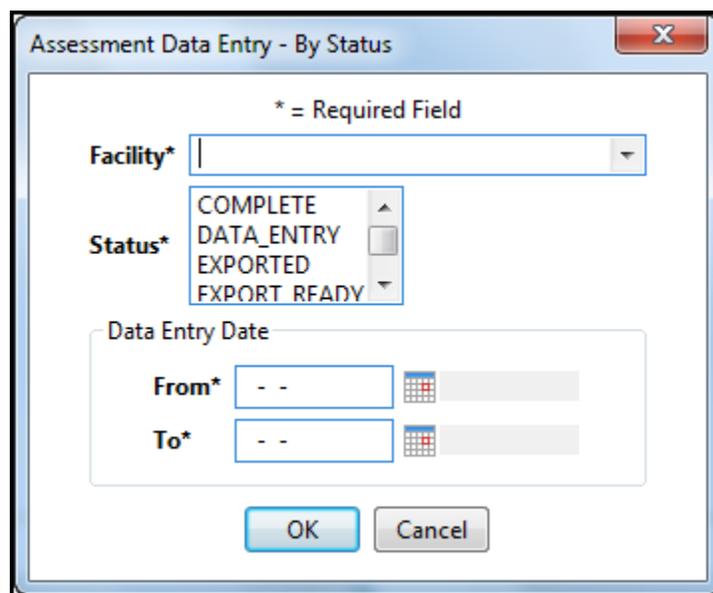
Assessment Data Entry – By Status

Complete the following steps to run the Assessment Data Entry – By Status report:

- 1. Select Assessment Data Entry – By Status from the Reports drop down on the toolbar.



- 2. The parameter screen displays.



3. Complete the following required fields which are bold and marked with an asterisk (*):

- **Facility***
- **Status***
- **From***
- **To***

4. To select all statuses, hold the SHIFT button while you select or scroll through the list. To select a few statuses, hold the CTRL button while you select what you need. The available status options are below:

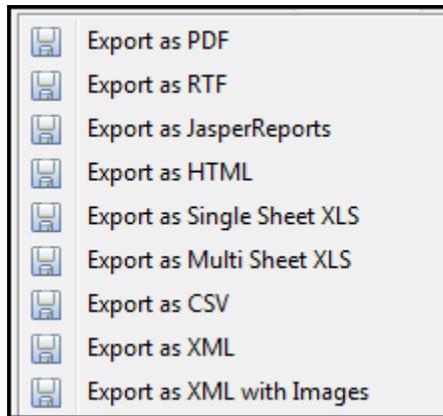
- IN_USE
- DATA_ENTRY
- COMPLETED
- EXPORT_READY
- EXPORTED

5. Select the OK  button to generate the report or the Cancel  button to close the parameter screen.

6. The Report Viewer screen opens displaying the generated report.

- To print the report, click the Print  icon on the Report Viewer screen.
- To save the report, click the Save  icon on the Report Viewer screen.
- To export the report, click the down arrow next to the Save  icon. Available export values display below:

- Export as PDF
- Export as RTF
- Export as Jasper Reports
- Export as HTML
- Export as Single Sheet XLS
- Export as Multi Sheet XLS
- Export as CSV
- Export as XML
- Export as XML with Images



- d. Select an export type.
- e. Select a location to save the report and click Save.

Help

Help Documents

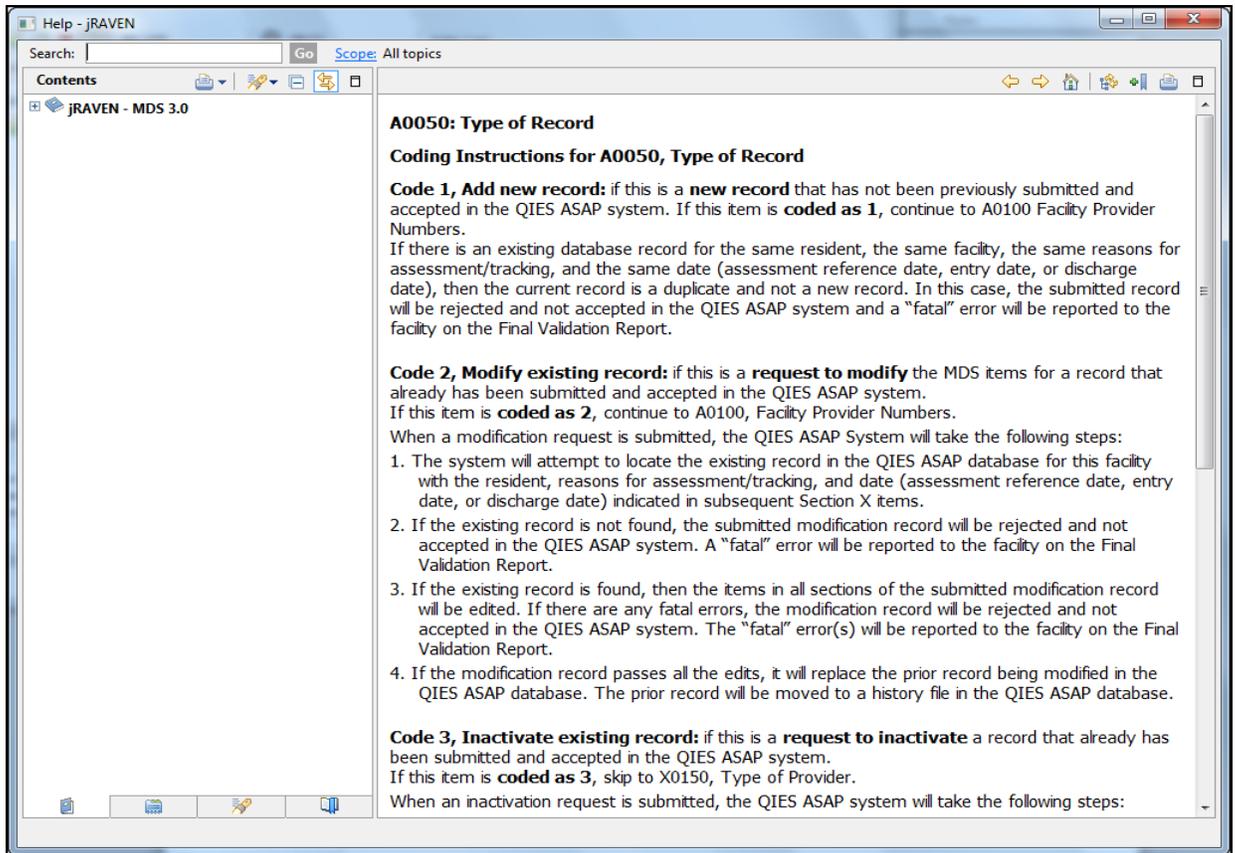
Help documents are available for all questions. The help documents in jRAVEN originate from the RAI Training Manual but are NOT meant to replace the manual.

Accessing Help Documents – Option 1

While performing data entry, the help documents can be accessed by clicking on the Help  icon to the right of each question. The help icon is a circle with a question mark inside.

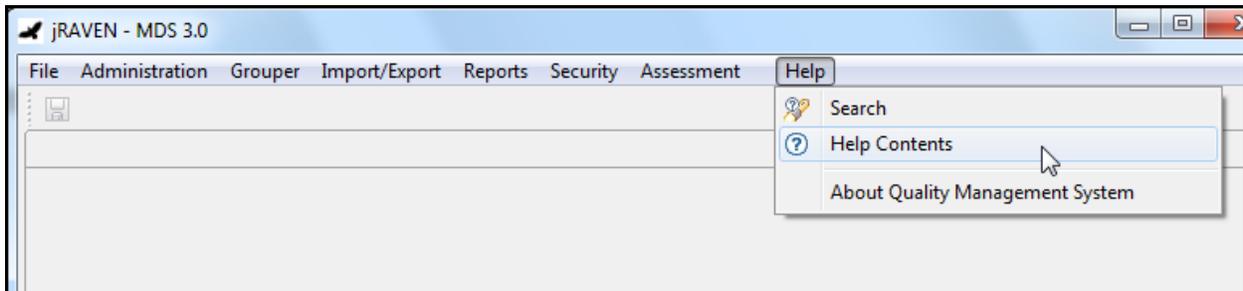
After clicking on the icon, a help screen will open and display the information from the RAI Manual relevant to the specific field. The following sections can be present depending on which field is selected:

- Item Rationale
- Definitions
- Steps for Assessment
- Coding Instructions
- Coding Tips and Special Populations

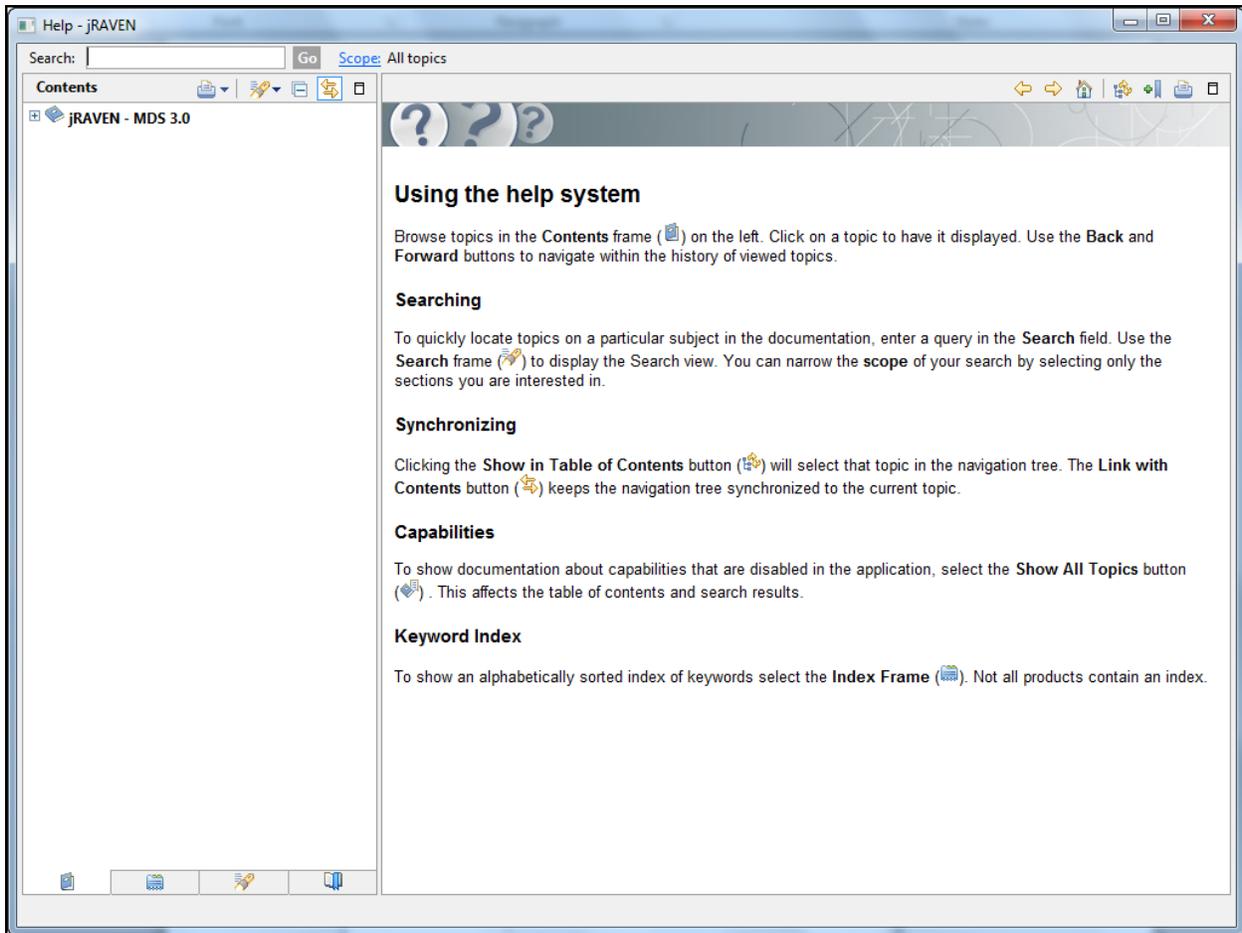


Accessing Help Documents – Option 2

The help documents can also be accessed by selecting Help Contents from the Help drop down on the toolbar. They are available any time a user is logged in to jRAVEN.



The Help screen opens.



Clicking the bold jRAVEN – MDS 3.0 heading will display all help documents for the most current version of jRAVEN.

Clicking the plus sign in the navigator on the left side of the screen will expand to display more versions of the help documents.

QIES Help Desk

The QIES Help Desk is available for technical support and assistance with problems or questions that may arise regarding the jRAVEN software.

QIES Help Desk contact information: 1-800-339-9313 or help@qtso.com

SUB_REQ VALUES

A0410 - Submission Requirement (sub_req value) is set within the [Facility Screen](#) and applies to all assessments associated with the Facility.

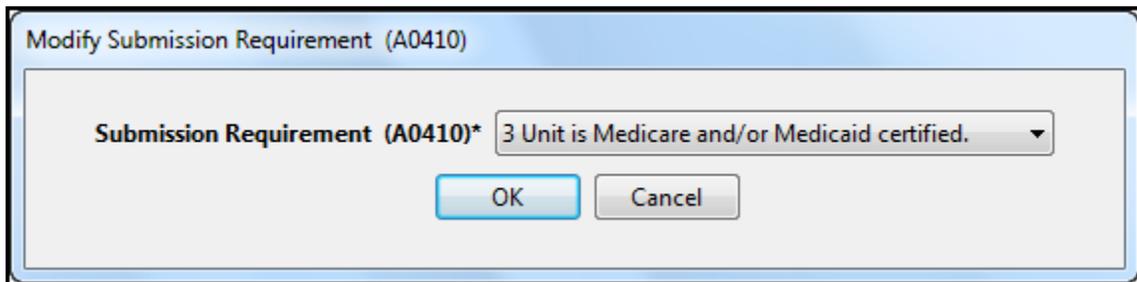
When first creating an assessment, the field may be modified within the Add Assessment window:

NOTE:

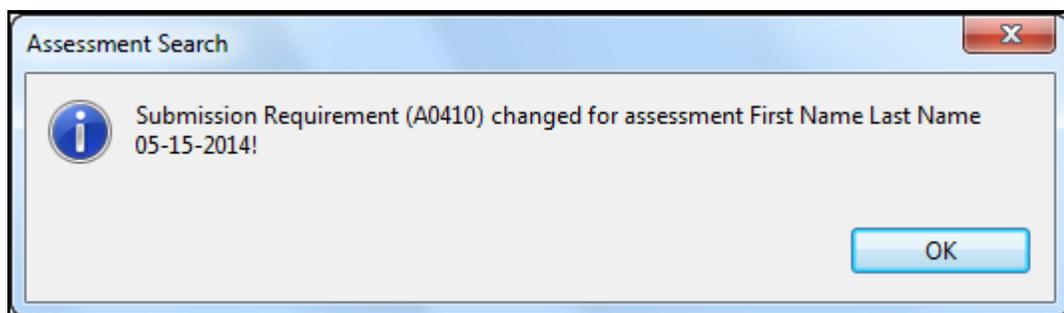
- If A0410 is equal to 2 or 3, the assessment **MUST** be submitted to the MDS Submission System.
- If A0410 is equal to 1, the assessment is **NOT** submitted to the MDS Submission System.
- The user must be logged in as a System Administrator or Data Entry user type to modify A0410.

Once an assessment has been created, complete the following steps to modify the Sub_Req:

1. From the Assessment Search Screen, find the assessment you would like to modify ([Search for an Assessment](#)).
2. Click the assessment to be modified.
3. Click Modify SUB_REQ  in the lower right corner of the search window.
4. The Modify Submission Requirement (A0410) window displays.



5. Select the appropriate SUB_REQ for the assessment. Click OK, to change the value and proceed. Click Cancel, to close the window and leave the submission requirement unchanged.
6. Once a change has been made, the Submission Requirement change confirmation message will appear:



NOTE: The Modify SUB_REQ button is only available for records that have NOT been exported. If an exported record is highlighted, the Modify SUB_REQ button is disabled (grayed out).

RUGS / Grouper configuration:

The purpose of the Grouper Configuration screen is to control what parameters are passed to the RUG groupers for specific Section Z fields in applicable MDS 3.0 assessments. The parameters are unique to the currently selected facility. Each combination of parameters is stored as a grouper configuration record with begin & end dates for that specific set of parameters. The set of grouper configuration records must span the timeframe beginning October 1, 2010 and ending December 31, 2020.

For MDS 3.0 Medicare RUG calculations (stored in MDS 3.0 items Z0100 and Z0150), the RUG-IV grouper Version 1.03 must be used with the number of groups set to 66 and the Calculation Method set to index maximizing. These are the default settings. However, the user must specify a Case Mix Index (CMI) set for use with Medicare RUGs, in accordance with the designation (rural or urban) of the currently selected facility.

NOTE: The Case Mix Index Set field defaults to “E01 Medicare SNF PPS 66 Group Rural”. Facilities will need to modify the setting as applicable.

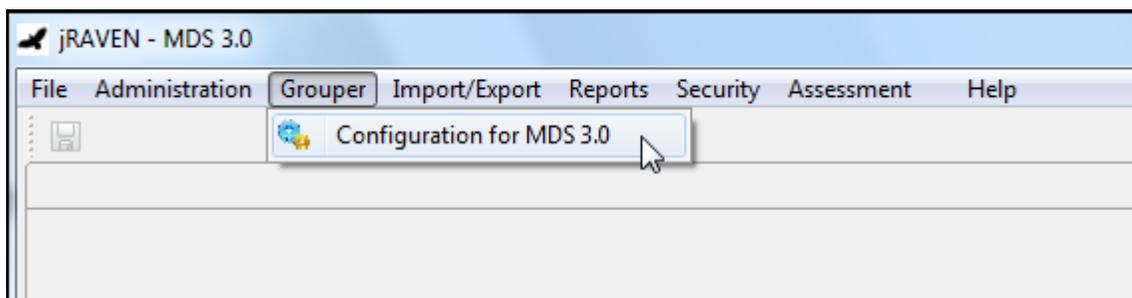
For MDS 3.0 State RUG calculations, the user must identify which MDS 3.0 items (Z0200 and Z0250) are active for the state where the currently selected facility is located. The state should also provide guidance on which RUG grouper to use (III or IV), and the parameters to be selected. By default, no configuration records are provided, therefore, Z0200 and Z0250 will be blank for MDS 3.0 assessments until State RUG Options are configured.

For additional information on RUG-IV parameters and their meaning, please read the RUG-IV DLL user documentation provided on the CMS web site.

MDS 3.0 Grouper

To View/Edit the Grouper Configuration select Configuration for MDS 3.0 from the Grouper menu to add/modify RUG settings.

NOTE: The assessment must be closed before accessing the RUGS menu.



The Grouper configuration window displays and contains the following fields:

- Medicare Rug Options or State/Medicaid Rug Options
- Z drop-down
- Facility
- RUG Version

- Logic Version
- RUG Model
- Calculation Method
- Date
- Case Mix Index Set
- Rehab Type

The screenshot shows the 'Grouper Configuration' window in jRAVEN - MDS 3.0. The window title is 'Grouper MDS 3.0'. The main configuration area includes several sections:

- Medicare RUG Options:** A drop-down menu currently set to 'Z0200'.
- Facility:** A drop-down menu set to 'no - test'.
- RUG Version:** A drop-down menu set to 'IV'.
- Logic Version:** A drop-down menu set to '1.03'.
- RUG Model:** A drop-down menu set to '66 Group'.
- Calculation Method:** A drop-down menu set to 'Index Maximizing'.
- Date:** Two date pickers: 'Begin Date' set to '10-01-2010' and 'End Date' set to '09-30-2011'.
- Case Mix Index Set:** A drop-down menu set to 'E01 - Medicare SNF PPS 66 Group'.
- Rehab Type:** A drop-down menu set to 'MCARE'.

Below the configuration fields is a table with the following data:

Model	Calc Method	CMI Set	Begin Date	End Date	Version
66 Group	Index Maximizing	E01 - Medicare SNF PPS 66 Grou...	10-01-2010	09-30-2011	IV
66 Group	Index Maximizing	E03 - Medicare SNF PPS 66 Grou...	10-01-2011	09-30-2013	IV
66 Group	Index Maximizing	E03 - Medicare SNF PPS 66 Grou...	10-01-2013	01-01-2099	IV

At the bottom of the window, there are buttons for 'Update RUG Options', 'Add', 'Delete', 'Edit CMI Sets', 'Restore Defaults', and 'Validate'. A note at the bottom states: 'NOTE: Begin Date and End Date are Assessment Reference Dates.'

Choose a RUG Option from the drop-down. This drop-down allows the user to switch between the grouper configuration options for Medicare RUGs (MDS 3.0 items Z0100 and Z0150) and State/Medicaid RUGs (MDS 3.0 items Z0200 and Z0250). Choose one of the options to make the appropriate configuration settings selections. The screen will refresh to display the configuration records currently in effect for the RUG Option drop-down value selected.

Z drop-down: For Medicare RUG Options, the Z drop-down is disabled, as Medicare RUG values are always placed in MDS 3.0 items Z0100 and Z0150. However, if State/Medicaid RUG Options is selected, the Z drop-down field is enabled and contains the available Section Z item values (Z0200 and Z0250). The user must select a Z item so jRAVEN can associate State RUG configuration options with the specified Section Z field.

Select a Facility drop-down: The drop-down list reflects all facilities in the jRAVEN database. jRAVEN supports multiple facilities and each custom configuration is facility specific.

RUG Version drop-down: For Medicare RUG Options, this value should always be IV, since RUG-IV is required for the Z0100 and Z0150 calculations. However, for State/Medicaid RUG Options, the user can specify RUG-III or RUG-IV, depending on the requirements set forth by the state where the currently-selected facility is located.

Logic Version drop-down: The Logic Version of the RUG calculator. Currently, only one version is available for each RUG version. The Logic Version is automatically populated, depending on the RUG version that is selected.

RUG Model drop-down: The grouping models available for the currently-selected RUG version.

Case Mix Index Set drop-down: The CMI set used during RUG calculation. Default, as well as custom CMI sets, display according to the selected RUG model. For Medicare RUG Options, the user **MUST** set this value based on whether the currently selected facility is classified as rural or urban.

Calculation Method: The method used for RUG calculations.

Date: Set beginning & ending date range for the current set of parameters. The date range determines which records will handle different target dates. For example, a target date of 10-15-2011 would use the parameters in the grouper configuration record that contains 10-15-2011 within its range.

NOTE: Configuration records for Medicare RUG Options cannot have overlapping date ranges. For State/Medicaid RUG Options, overlapping date ranges are not allowed for records associated with a specific Z value.

Rehab Type: The rehabilitation type parameter to be used with the currently selected RUG Version.

NOTE: For Medicare RUG Options, Rehab Type options are MCARE and MCAR2. For State/Medicaid RUG Options the Rehab Type is Other.

The Update RUG Options will update the information selected in these drop-down menus. When updating the default record set, an option set with an italicized font is shown in the table. The italicized font indicates it is not an added record, but rather an updated version of the default record. (A single record must always be present, so if the default option set does not meet the user's needs, it must first be updated with additionally-needed option sets added later.)

Add a new option set

To add a new option set complete the following:

1. Select Edit CMI Sets.
2. Click New Set

NOTE: The record being added cannot have a start or end date overlapping existing records for the facility.

delete an existing option set

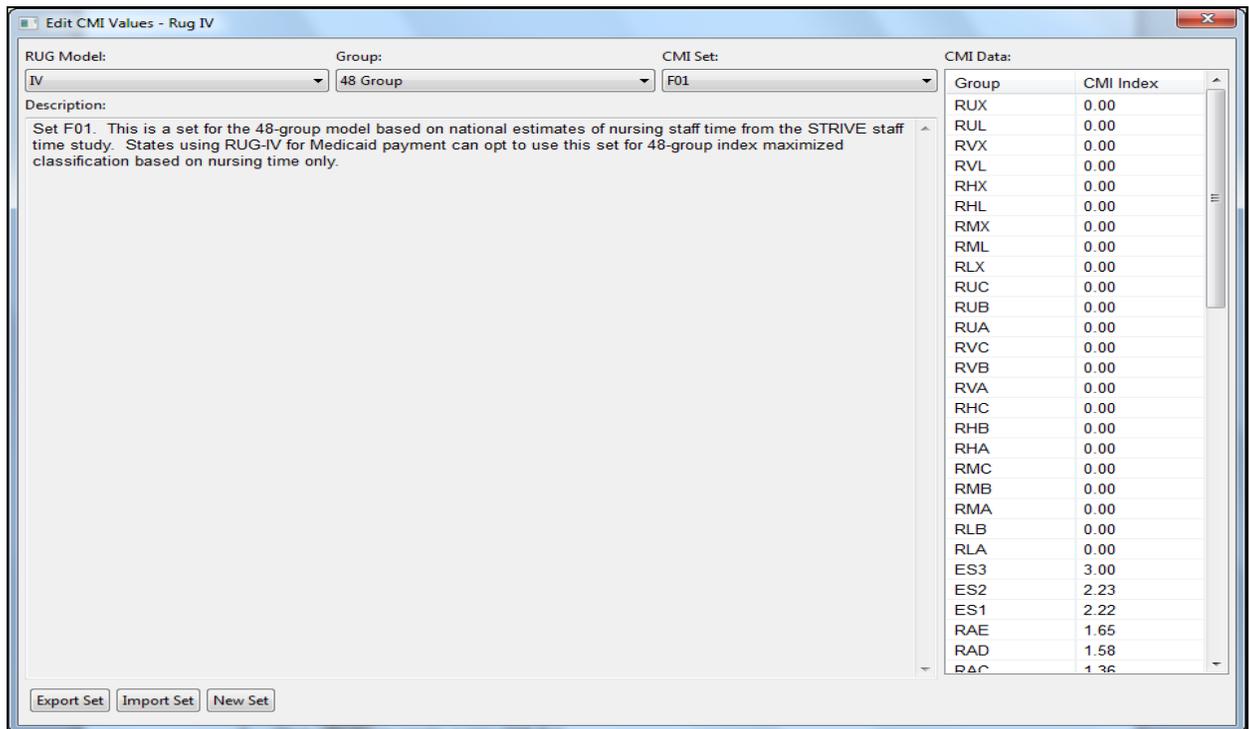
To delete an existing option set complete the following:

1. Select the record.
2. Click Delete .

NOTE: If the record is an updated default option set, the default option set will be restored. If the record was added, it will be removed from the list.

add a custom CMI set

1. Select the RUG Version in the drop-down on the form.
2. Click Edit CMI Sets .
3. The Edit CMI Values window displays and contains the following fields:
 - RUG Model
 - Group
 - CMI Set
 - CMI Data



4. Click New Set to create a new CMI Set. The following New Set screen will open.

The image shows a 'New Set' dialog box with the following fields:

- From set:** A dropdown menu.
- Name of set:** A text input field.
- Description:** A large text area for notes.
- Save:** A button at the bottom left.

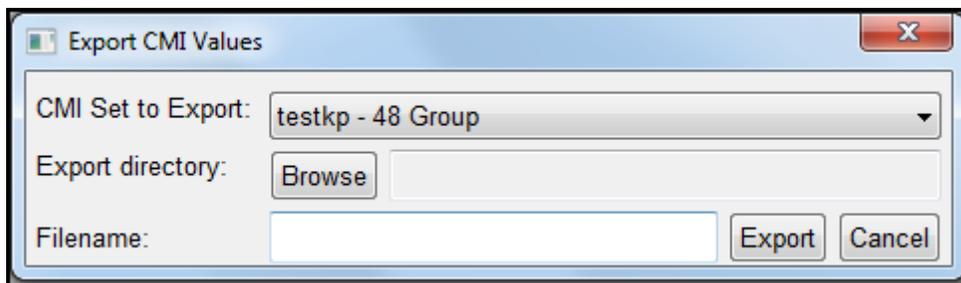
- a. **From Set:** For ease of use, a new set can be based off existing sets. The drop-down box allows the user to choose from each existing set for the appropriate RUG version.
 - b. **Name of Set:** The custom name of the set being created. For processing purposes, this name may only be alphanumeric (letters and numbers).
 - c. **Description:** Allows the user to add any notes or a general description of the new set.
5. Once the appropriate fields are filled out, click  to save the information and close the New Set window and return to the Edit CMI Values window.

Import/Export CMI sets

The Import and Export features were designed to import and export custom CMI sets only and will not export hard coded sets.

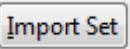
Complete the following steps to Export a custom CMI set:

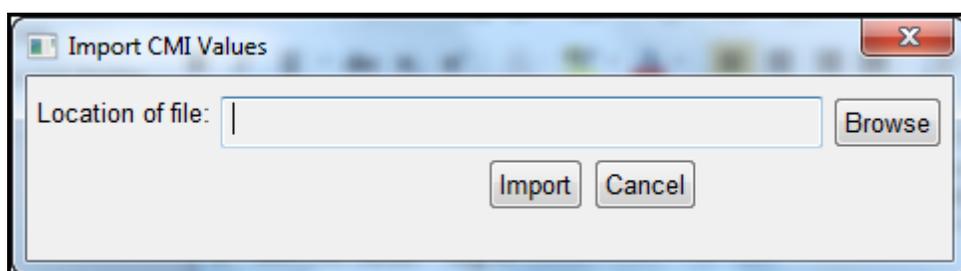
1. Select Edit CMI Sets .
2. Select Export Set .



3. Chose the custom CMI set to export.
4. Select the directory to save the CMI set and name the file. A file will be created with the custom set.

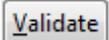
Complete the following steps to Import a new CMI set:

1. Select Edit CMI Sets .
2. Select Import Set .



3. Choose the location of the CMI set to import. The file's contents will be added to the system and become available to use.

The Restore Defaults button  will set the selected facility's grouper configuration to the default settings. Only the selected RUG option screen is affected. On the State/Medicaid RUG option screen, selecting the restore button will remove all grouper configurations for the selected facility.

The Validate button  will analyze the date ranges of the option sets shown in the table. Any gaps will be reported. A good configuration is one that has all possible dates covered from 10-01-2010 onward to 12-31-2020 (always assign your last option set with an end date of 12-31-2020.)