Report Name	File Name	Summary	Access	New in Release
LTCSP Reports (30 Total)				
SNF Beneficiary Protection Notification Review	BenNoticeWorksheet.pdf	Worksheet provided to the facility for the completion of the SNF beneficiary Protection Notification reviews.	LTCSP → Reports → Beneficiary Notice Worksheet	11.0
Complaint and FRI Residents	Complaint.pdf	Lists any complaints and/or facility-reported incidents entered from ACTS, during offsite prep, initial pool process, and investigations. Includes complaint/incident, resident, interview and investigation information.	LTCSP → Reports → Complaint and FRI Residents	11.0
Entrance Conference	EntranceConf.pdf	Lists information gathered during the Entrance Conference meeting.	LTCSP → Reports → Entrance Conference	11.0
Entrance Conference Worksheet (Entrance Conference Instructions)	EntranceConferenceForm.pdf	The Entrance Conference Worksheet to print/reference for the entrance conference with the facility.	LTCSP → Reports → Entrance Conference Instructions	11.0
Matrix Instructions for Providers (Facility Matrix)	Matrix_with_Instructions.pdf	Provide the matrix to the facility to identify pertinent care categories for: 1) newly admitted residents in the last 30 days who are still residing in the facility, and 2) all other residents.	LTCSP → Reports → Facility Matrix	11.0
Facility Tasks	FacTasks.pdf	Lists all Facility Tasks, any related residents, any notes and any No answer for a CE, with the potentially cited tags/severity and any notes related to a CE.	LTCSP → Reports → Facility Tasks	11.0
Immediate Jeopardy Template report	IJ_Template.pdf	A writable PDF document, which describes the requirements for IJ evidence documentation, and is used to detail/convey this preliminary information to the facility.	LTCSP → Reports → Immediate Jeopardy Template	New Report in 11.8.1
Initial Pool by Resident	InitPoolbyRes.pdf	Lists initial pool resident assignments. Lists residents with an interview reason and/or Subgroup, sorted by resident name. Includes resident unit/room number, assigned surveyor (If applicable), and associated subgroup(s).	LTCSP → Reports → Initial Pool by Resident	11.0
Initial Pool by Subgroup	InitPoolbySubGrp.pdf	Lists initial pool residents by subgroup. Lists all subgroups. Includes resident(s) listed for each subgroup, resident unit and room number, and assigned surveyor.	LTCSP → Reports → Initial Pool by Subgroup	11.0

LTCSP Reports

Report Name	File Name	Summary	Access	New in Release
Initial Pool by Surveyor	InitPoolbySvyr.pdf	Lists initial pool residents grouped by surveyor. Lists survey team members with residents/subgroups assigned to them. Includes resident unit/room number, and associated subgroups. Includes unassigned residents.	LTCSP → Reports → Initial Pool by Surveyor	11.0
Investigation Report	Investigation.pdf	Has two sections; lists residents with care areas marked for further investigation who are not included in the sample, and also lists all residents included in the sample with their corresponding investigation and care area(s).	LTCSP → Reports → Investigation Report	11.0
MDS Indicator Facility Rate Report	FacilityRate.pdf	Lists the rates of MDS Indicators alphabetically, by number and percentage of residents for each indicator. Includes all indicators even if there are no applicable residents.	LTCSP → Reports → MDS Indicator Facility Rate Report	11.0
Offsite Prep Screen Information	OffsitePrep.pdf	Report version of the Offsite Preparation screen in the LTCSP application. Includes all information from the Offsite Prep screen, including any notes/comments.	LTCSP → Reports → Offsite Prep Screen Information	11.0
RO Offsite Prep Screen Information	ROOffsitePrep.pdf	Report version of the Offsite Preparation screen in the LTCSP application, for Federal comparative surveys. Includes information from the Offsite Prep screen, including Offsite Prep data copied from the SA survey, and any notes/comments.	LTCSP → Reports → RO Offsite Prep Screen Information	11.5
Offsite Selected Residents	OffsiteSelected.pdf	Lists all residents who were preselected during the survey export process. Includes resident name, room number, and associated MDS indicators.	LTCSP → Reports → Offsite Selected Residents	11.0
Potential Citations - Opening Statement for Cited Tags	PotCiteShort.pdf	Lists cited tags and tags marked "Don't Cite" with "Moved to another tag" as the reason, with only the opening statement.	LTCSP → Reports → Potential Citations - Opening Statements for Cited Tags	11.7
Potential Citations - Cited	PotentialCite.pdf	Lists cited tags and tags marked "Don't Cite" with "Moved to another tag" as the reason, with their corresponding citation category, scope and severity level, opening statement, and any residents marked to be included with the cited tag. Also includes any applicable investigation and resident notes.	LTCSP → Reports → Potential Citations - Cited	11.0

Report Name	File Name	Summary	Access	New in Release
Potential Citations - Not Cited	PotCiteNotCited.pdf	Lists any tags marked Not Cited, or Undeclared with their corresponding scope and severity information, opening statement notes, and applicable investigation and resident notes. Also includes any residents excluded from cited tags.	LTCSP → Reports → Potential Citations - Not Cited	11.0
Initial Pool Prrocess - Resident Interview (RI Care Areas and Probes)	RI_CA_Probes.pdf	Lists all care areas available for resident interviews, including the probe text, and response options for each.	LTCSP → Reports → RI Care Areas and Probes	11.0
Initial Pool Prrocess - Resident Observation (RO Care Areas and Probes)	RO_CA_Probes.pdf	Lists all care areas available for resident observations, including the probe text, and response options for each.	LTCSP → Reports → RO Care Areas and Probes	11.0
Initial Pool Prrocess - Resident Representative Interview (RRI Care Areas and Probes)	RRI_CA_Probes.pdf	Lists all care areas available for resident representative interviews of residents marked non-interviewable. Includes the probe text, and response options for each.	LTCSP → Reports → RRI Care Areas and Probes	11.0
Residents Marked for FI by Care Area	ResMarkedbyCA.pdf	Lists residents with at least one care area marked for further investigation, including assigned surveyor, data source, and notes. Sorted alphabetically by care areas.	LTCSP → Reports → Residents Marked for FI by Care Area	11.0
Residents Marked for FI by Resident	ResMarked.pdf	Lists residents with at least one care area marked for further investigation, including assigned surveyor, data source, and notes. Sorted alphabetically by residents' last name.	LTCSP → Reports → Residents Marked for FI by Resident	11.0
Sample List Provided to the Facility	SampleToFac.pdf	Lists, alphabetically by last name, all residents included in the sample or associated with a Facility Task. Includes resident ID and name.	LTCSP → Reports → Sample List Provided to the Facility	11.0

Report Name	File Name	Summary	Access	New in Release
Surveyor Notes	SurveyorNotes.pdf	Lists any notes surveyors record in the global note pad. List is grouped by surveyor.	LTCSP → Reports → Surveyor Notes	11.0
Surveyor Workload Report - By Investigation	WorkloadbyInvst.pdf	Lists surveyor workload report, grouped by investigation.	LTCSP → Reports → Surveyor Workload Report - By Investigation	11.2
Surveyor Workload Report - By Resident	WLbyRes.pdf	Lists surveyor workload report, grouped by resident.	LTCSP → Reports → Surveyor Workload Report - By Resident	11.2
Surveyor Workload Report - By Surveyor	WLbySurveyor.pdf	Lists surveyor workload report, grouped by surveyor.	LTCSP → Reports → Surveyor Workload Report - By Surveyor	11.2
Team Meeting Notes	TeamMeeting.pdf	Lists the questions, answers and any ongoing notes from Team Meetings.	LTCSP → Reports → Team Meeting Notes	11.0
Unnecessary Medication Selected Residents	UnnecMeds.pdf	Lists residents selected for the Unnecessary Medication review. Includes reason for selection, room number, assigned surveyor, and associated notes.	LTCSP → Reports → Unnecessary Medication Selected Residents	11.0

Report Name	File Name	Summary	Access	New in Release
LTCSP Documentation Reports (confidential) in ACO/ARO (7 Total)				
Surveyor Notes	LTCSPSurveyorNotes.rpt	Lists all surveyors by name (last name, first name) and ID. Lists any notes surveyors recorded.	ACO → NH → Surveys → right-click survey → LTCSP Documentation Reports (confidential) → Surveyor Notes	New Functionality in 11.2
Team Meeting Notes	LTCSPTeamMeetingNotes.rpt	Lists the full text of the LTCSP application, including indication of date option (day1, day2, or later), values entered by the TC, and any available notes.	ACO → NH → Surveys → right-click survey → LTCSP Documentation Reports (confidential) → Team Meeting Notes	New Functionality in 11.2
Initial Pool Data	LTCSPInitialPool.rpt	Lists Care Area descriptions, RI, RRI, RO and RR responses for each Care Area, including blank responses, documentation for each Care Area, and MDS Discrepancy, if checked.	ACO → NH → Surveys → right-click survey → LTCSP Documentation Reports (confidential) → Initial Pool Data	New Functionality in 11.2
Resident Investigation Data	LTCSPInvestByInvest.rpt	Lists residents investigations. If sorted by Investigative Area (default), report is sorted by investigative area with associated residents (last name, first name) under that area. If sorted by Resident, report is sorted by resident (last name, first name), with associated investigations listed.	ACO → NH → Surveys → right-click survey → LTCSP Documentation Reports (confidential) → Resident Investigation Data	New Functionality in 11.2
Facility Task Data	LTCSPFacilityTask.rpt	Lists Facility Tasks, the surveyors (name and ID) assigned to the Facility Task, and the residents (last name, first name).	ACO → NH → Surveys → right-click survey → LTCSP Documentation Reports (confidential) → Facility Task Data	New Functionality in 11.2
Potential Citation Data	LTCSPPotentialCite.rpt	For Cited and Non-Cited Tags, displays: - Tag description and scope severity - Investigative areas and residents where CE response is No - Residents who are selected for inclusion (last name, first name, (ID) - Surveyor who performed the investigation (last name, first name (ID)) - Severity for the specific resident / CA with the description Additionally, for Non-Cited tages, the rationale for not citing is listed.	ACO → NH → Surveys → right-click survey → LTCSP Documentation Reports (confidential) → Potential Citation Data	New Functionality in 11.2
Federal Monitoring Survey Documentation Report	LTCSPFMSurvey.rpt	Available only in ARO. Lists deficiency information from SA/RO surveys. Including, initial pol, sample selection, investigation, and facility task results.	ARO → NH → Surveys → right-click survey → LTCSP Documentation Reports (confidential) → Federal Monitoring Survey	11.5