CMS MDS 3.0 Software Developer/Vendor Call Agenda

Thursday, November 14, 2024
12:00 p.m. to 1:00 p.m. (ET)
Zoom Link:
https://cms.zoomgov.com/j/1612173700?pwd=1j7Kb2vgQQeiVMnmlMMLe6b5HbAIgQ.1
Dial in Option: 833-435-1820
Meeting ID: 161 217 3700
Password: 684027

Welcome ..... Kimberlie Jasmin, CMS

Welcome and thank you for joining the Minimum Data Set (MDS) Software Developer/Vendor Call. On this call we will provide information on MDS updates that will be effective October 1, 2025. We will discuss the Data Submission Specification updates, Validation Utility Tool (VUT) updates, enhancements to the iQIES submission system, and the state-required Section S items. If you do not have the agenda for this call, it may be found at https://qtso.cms.gov and click on the MDS Vendors link under the "I'm a Vendor" tab in the middle of the page. All of these updates and enhancements will be effective October 1, 2025. Please note that CMS policies related to the MDS are not the focus of the vendor calls.

If time allows, we will have an open Q & A session at the end of this call.

I will now turn it over to John Jackson.

Data Submission Specification Updates .....John Jackson, GDIT

New Specs posted! Yes, the draft MDS specs V3.10.0 have been posted on the MDS Technical Information page. These specifications go into effect on October 1, 2025. The final specifications will be posted in early 2025 with whatever Section S changes are made…and if we (the community – iQIES and vendors) find any issues with the draft specs (of course).

So, what's new? "R" you ready for this? We now have Section R – Health-Related Social Needs, with five new items. Note that Section R appears on the NC, NQ, NP and SP ISCs…and if the assessment reference date is more than a year past the admission date (366 days), then these items can be skipped.

What else is new? Uh-oh, there are new O0390s..for Therapy Services. The new O0390 has six items, A through E and Z. You might also be thinking "uh-oh, where are the O0400s and O0420"? They're gone…EXCEPT for O0400D2. Why? Well, the PDPM needs that item. Note that O0400D2 is enabled only if the new O0390D item is checked (edit -4076)!

Are you in the Mood for Section D changes? The frequency items (D0150A2, D0150B2, …) now have the dash as an allowed value. As a result, the Section D edits have changed. Check out the new edits -4082 through -4092.

Other changes of note:

- A2000 has been removed from the NPE.
- I7900 was added to the NQ, ND, NP, SP, and SD.
- A1250 items have been removed from MDS.

Living in the OSA (Should I have said Rocking instead?). Item A1110B has been updated in iQIES to accept the dash as an allowed value for the OSA, as it has been in the MDS ISCs.

VERY IMPORTANT NOTE: As of October 1, 2025, iQIES WILL NOT ACCEPT OSA assessments with target date on or after October 1, 2025. iQIES will continue to process assessments with target dates on or earlier than September 30, 2025.

Please review the Item Change and Edit Change Reports in the draft specs to see all the changes. As always, please continue to monitor the MDS Technical Information page for any further updates.

State Required Section S Items..... Ellen Berry, CMS

This year we are starting the automation process for States to submit their Section S items to CMS. We hope we will have the items finalized by the end of this year so we can have the final data specs posted between mid-January to mid-February. I don't want to commit to that date just because we don't know (1) if there will be changes and (2) if there are, what extent of those changes will be. States have been given a deadline of December 13, 2024 for implementation on October 1, 2025.

iQIES Submission System & Validation Utility Tool (VUT) Updates ..... Liz Kowal, ICF

On October 1, 2025, the iQIES submission processing system and VUT will process records with a target date on or after 10/01/2025 using version 3.10.1 of the MDS Data Specifications.

iQIES will continue to process records with a target date prior to October 1, 2025, using the appropriate set of data specifications in effect for the target date of the submitted record.

Please note that we will not process OSA records in the VUT effective October 1, 2025.

Stay tune for when the MDS VUT will be available for vendor testing in 2025.

Inactive User Policy..... Kimberlie Jasmin, CMS

iQIES implemented an inactive user policy earlier in the year to align with CMS security policies. This security policy required the deactivation of user roles for inactive accounts. Inactive users will receive an email indicating that they will need to login into iQIES to keep their user roles and account active. If

inactive users do not log in within ten days their iQIES roles will be revoked and they will not be able to access the system. For more information, click on this link: https://qtso.cms.gov/news-and-updates/iqies-will-implement-inactive-user-policy-0.

Discussion of Submitted Q & A's ..... Kimberlie Jasmin, CMS

No questions were submitted prior to this software developer/vendor call.

Open Q and A Session ..... Kimberlie Jasmin, CMS

Q1: Are we supposed to be seeing a summary of the RAI changes?

A1: The link below is the page for the RAI manual and item sets:

https://www.cms.gov/medicare/quality/nursing-home-improvement/resident-assessment-instrument-manual

Q2: Do you have a time frame for when PBJ is moving to iQIES?

A2: No. CMS have not made any announcement about PBJ moving into iQIES.

Q3: Is there a way to submit assessments/batches electronically from a vendor system to iQIES without user intervention? Or is it a user-driven process only? Is there a process to upload directly from the vendor, like from our software without the user needing to log into iQIES separately and a way, then for those validation reports to come back through our software?

A3: CMS have not yet implemented a method for vendors to submit assessments/batches electronically to iQIES without user intervention. It is a future goal, and we are aware that you are looking for this, but CMS just don't know when and we do have to revisit this occasionally, with our workload. We will make a note that more of you are asking for it.

Q4: Have you considered re-releasing the full specs with the errata included?

A4: CMS must follow Federal requirements, Section 504 and 508, so it takes us well over a week to create 508-compliant data specs every single time. It is very time consuming and costly for taxpayers. So, we do not plan to release full data specs every single time we have an errata. Our goal is to not have an errata. So, please review the data specs thoroughly. Submit your questions, your comments, and your concerns sooner, not later.

Q5: We had some challenges this year with additional items that states can require on quarterly and other types of assessments. Is there a similar policy where they have a certain timeline? I guess, notify either CMS or vendors when questions are going to be enabled? I know vendors need some time and some notice to be able to activate those within our systems. And so, if there was some type of a cutoff date or and just communication of that we would appreciate that.

A5: This is the first time that we automated the “Additional Items required by States” within iQIES behind the scenes. So, we will do a lessons learned and move forward and hopefully, next year it will be smoother for the next round of additional items. We have a deadline around August 14th, and we would like receive feedback. Would that give you enough time for vendors to implement? My gut tells me yes.

Q6: I have a notation, probably, for John Jackson. That rule edits -4075 and -4078 are not complete. Edit -4075 mentions “ABCD”. But you only provided us “ABC”, and rule edit -4078 just leaves it on as equal to and does not indicate what the equal to should be.

A6: Thank you for calling my attention because you're right that needs to be fixed. When we generate the PDFs from the Access database, it may occasionally chop off things a little bit here and there, and usually we see those and deal with them as part of the 508 process as they go from being a word file to being a PDF. It looks correct in my database, but I will bet you it's in the PDF where the issue is. I'll make a note of that and make sure that the next go around, that doesn't get chopped off. Thank you for reporting these things.

Q7: If there's a difference between the database file and another document, the database file is probably the correct one?

A7: Yes, because the database is the source for all the PDFs. We have an excellent person that does the 508 check for everything. But you may have noticed there's quite a few PDFs in there. So, if you notice these things that we didn't see, please let us know. And I can make a note to say, check this specifically for this version of the specs, because it's quite possible it could happen again. So, thank you for that.

Q8: I have a question related to the user interface for MDS submission in iQIES is that going to be inactivated or sunset in some manner in 2025.

A8: Yes, it will be sunset in 2025 like the OSA, so they will be able to still use the user interface for records with target dates of 9/30/2025 and earlier. But they will not be able to submit with target dates of 10/1/25 and later.

Q9: There was an article or an answer piece in McKnight’s that generated some volume for us from users. There was a concern that the process that they're familiar with for our software, which is that XML download and upload process you mentioned was somehow going to be unavailable. And we'd have to, you know, structure a new connection. So, if that continues and it's just the actual coding interface that's going away. That helps us understand. Will vendors be required to have a direct connection to perform the submissions for them into iQIES?

A9: No. The user interface that I'm speaking about is where a person manually logs into iQIES and they manually code within iQIES and they click the submit button. Usually, vendors are uploading an XML file and are not using that user interface. The XML upload process will continue and anybody who connects to iQIES that has an XML file can submit via that way. It can be a vendor, or it could be the

provider that uses vendor software, but they do their own submissions. It could be that corporate does the submissions. Does that make sense?

Q10: Is there a way for us to send a dummy test file without a user driven process, because what we always have to do is run a test using a real MDS patient assessment?

A10: The Validation Utility Tool (VUT) allows you to test your file to make sure it passes edits. It doesn't have all the system edits, but it does have all the data spec edits.

Q11: Can I ask what API you are looking into? Are you looking into FHIR?

A11: CMS is looking into FHIR. Whether we fully adopt FHIR, I am not sure but there are some areas where FHIR can't be applied for patient assessments. I'm not going to say we're going to be a hundred percent FHIR. There will be some type of API, but I cannot confirm today. We have an administration change coming up and priorities or direction can change.

Closing Comments ..... Kimberlie Jasmin, CMS

Thank you to our speakers for their awesome presentations and to all participants for joining the call today to keep up to date on the future changes to MDS. We hope you have found the information presented and important resources helpful. The minutes will be posted on the MDS Vendor page on the QTSO website at: https://qtso.cms.gov/vendors/minimum-data-set-mds-vendors.

Note: You can also register on the QTSO website to Vendor Newsletters via email at: https://qtso.cms.gov/vendors/registration. If you have additional questions, please send them to the CMS mailbox at IQIES@cms.hhs.gov.

Important Resources

QTSO Website
https://qtso.cms.gov
https://qtso.cms.gov/vendors
https://qtso.cms.gov/vendors/minimum-data-set-mds-vendors
https://qtso.cms.gov/software/iqies/news
https://qtso.cms.gov/software/iqies/reference-manuals
https://qtso.cms.gov/software/iqies/training

iQIES Website
https://iqies.cms.gov/
https://iqies.cms.gov/vut
https://iqies.cms.gov/known-issues
https://iqies.cms.gov/iqies/help

HARP User Account Training
https://www.youtube.com/watch?v=G1zj8JqxWg4

CMS.gov – MDS Technical Information
https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/NursingHomeQualityInits/NHQIMDS30TechnicalInformation

CMS.gov – MDS RAI Manual
https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/NursingHomeQualityInits/MDS30RAIManual

CMS.gov – MDS Patient Driven Payment Model (PDPM)
https://www.cms.gov/Medicare/Medicare-Fee-for-Service-Payment/SNFPPS/PDPM

E-mail MDS PDPM
pdpm@cms.hhs.gov

E-mail MDS Technical Issues
IQIES@cms.hhs.gov

Open Door Forums
https://www.cms.gov/outreach-and-education/outreach/opendoorforums/odf_snfltc