RESIDENT ASSESSMENT VALIDATION AND ENTRY SYSTEM (JRAVEN) USER GUIDE

In support of Software Version 1.7.0 (October 2019)

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INTRODUCTION

The Resident Assessment Validation and Entry System (jRAVEN) was developed by the Centers for Medicare & Medicaid Services (CMS). jRAVEN is a free Java-based software application which provides an option for facilities to collect and maintain MDS Assessment data for subsequent submission to the appropriate state and/or national data repository. jRAVEN displays the MDS Item Sets similar to the paper version of the forms.

MDS data provides survey facilities with a means to objectively measure and compare facility performance and quality, as well as support the development of improved standards. jRAVEN has the ability to import and export data in standard CMS record format, as well as enforce data integrity via rigorous edit checks against the CMS Data Specifications. The jRAVEN software application provides a data dictionary, comprehensive online help, as well as RUG and PDPM Grouper calculations.

INSTALLATION

INSTALLERS ACCESS RIGHTS

To install jRAVEN the User must be logged into the PC as a Workstation Administrator.

Users of the application MUST have read/write access to the location where the database is installed.

HARDWARE/SOFTWARE SPECIFICATIONS

The Minimum and Recommended System Requirements may be found on the QIES Technical Support Office home page: https://qtso.cms.gov

SECURITY

Making information security one of your organization's core values ensures the prevention of unauthorized viewing of Personally Identifiable Information (PII) or Protected Health Information (PHI).

It is important that providers work with their Information Technology (IT) team or other resources to build a security-minded organizational culture which enforces strong authentication and access controls, as well as limits physical access to devices (e.g., laptops, handhelds, desktops, servers, thumb drives, CDs, backups) containing PII or PHI data.

CMS recommends that providers encrypt the hard drive of any electronic device which has access to data containing PII or PHI, such as exported assessment records. Once assessments have been exported from the jRAVEN application, the data will no longer be encrypted. It is also recommended that those electronic devices which contain PII or PHI be physically secured and locked (password-protected) when not in use.

WINDOWS SETTINGS

In order to ensure the reliable operation of the jRAVEN software application, use of a supported Microsoft Windows operating system is imperative. The Font Size property must be set to "Small Fonts". This property can be found under the Settings tab of desktop properties: Start\Control Panel\Appearance and Personalization\Display\.

SYSTEM CONFIGURATION/INSTALLATION TYPE

STANDALONE

The Standalone installation is self-contained on one workstation.

NETWORK CLIENT

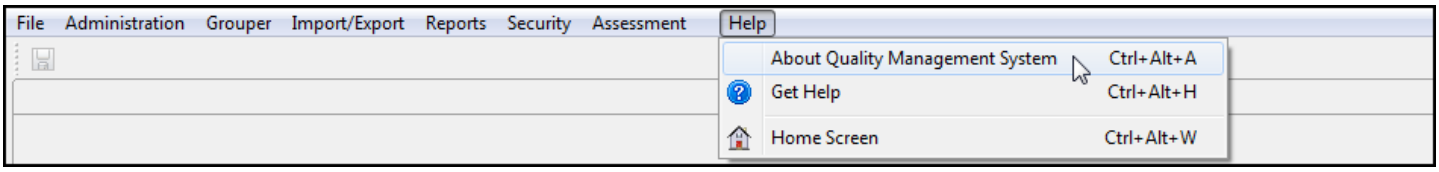
The Network Client/Server installation uses a server to support one or more individual workstations, all accessing one database by multiple computers and users.

- Servers hold the central database and must utilize the Server installation file first.
- Network Clients are placed on the users' individual workstations, which then access the database on the Server. The Network Client is installed after the Server installation has been successfully completed.

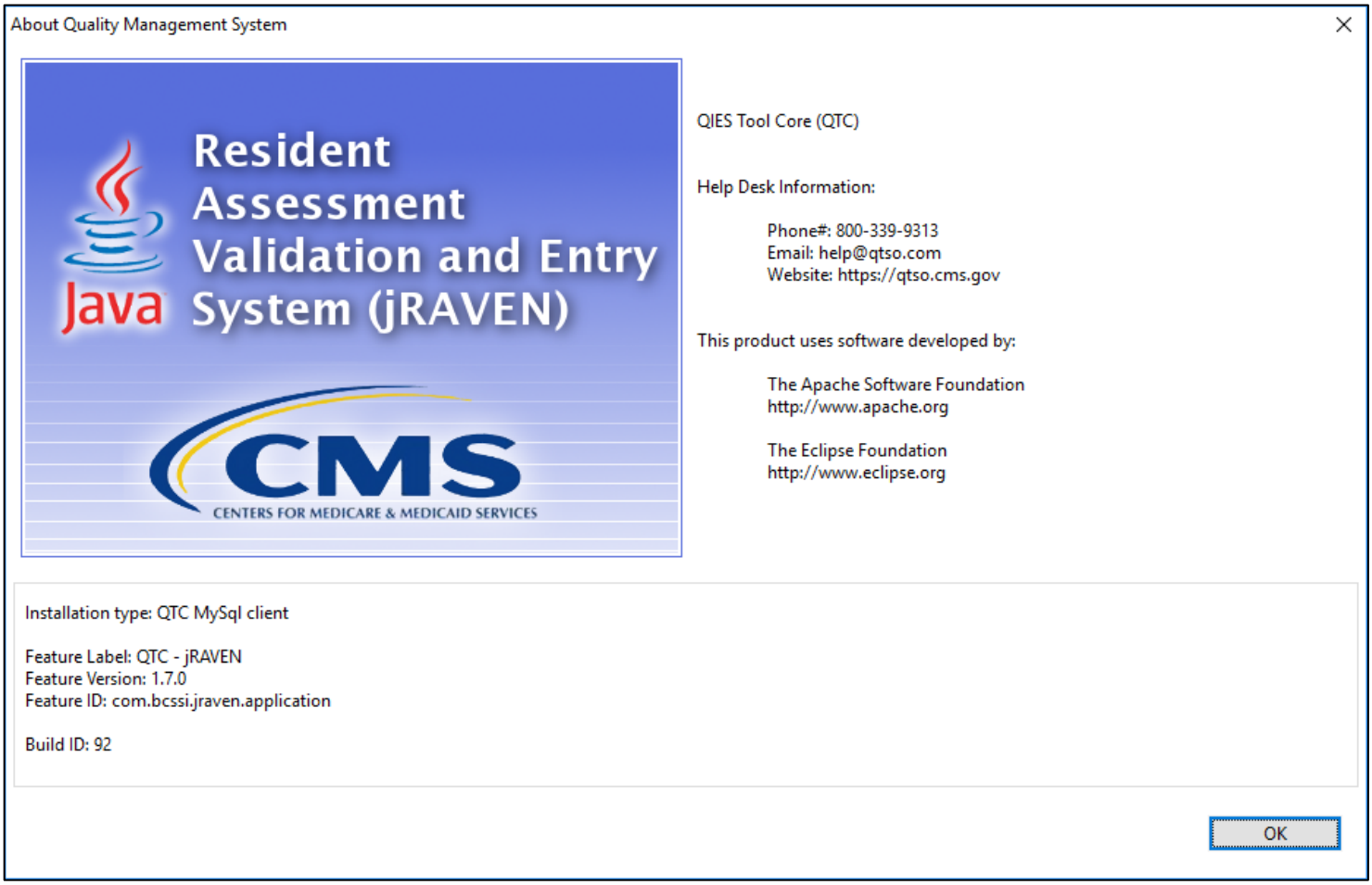
Please refer to the jRAVEN Installation Guide for assistance installing and setting up the jRAVEN application. The QIES Help Desk is available for technical support and assistance if needed, and may be contacted by phone at 800- 339-9313 or by email to help@qtso.com.

Version Verification

Information about the version of jRAVEN currently installed may be found by selecting 'About Quality Management System' from the Help drop-down on the Menu Bar.



The System Configuration/Installation Type, Feature Label, and Feature Version are displayed in the lower left side of the screen.



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 QIES 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.

GENERAL OVERVIEW

jRAVEN software provides the following functionality:

- Facility Set up/Maintenance
- User Set up/Maintenance
- Resident Set up/Maintenance
- Assessment Maintenance
- Import/Export
- Reporting

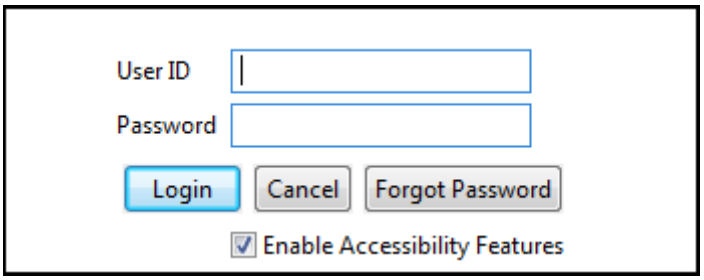
ACCESS

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

- Start Menu – Select the jRAVEN icon from the Start Menu
- Desktop – Double click the jRAVEN icon found on the desktop
- Directory – Navigate to the directory where jRAVEN is installed, double click the jRAVEN.exe

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.



SCREEN LAYOUT

TITLE BAR

Displays the name of the software application: jRAVEN.

MENU BAR

- Located just below the Title, the Menu Bar consists of drop-down lists which contain command selections dependent on user role and the screen that is currently active.
- Pressing the Alt key on the keyboard will place the cursor in the menu bar. 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 next menu item. Pressing the up and/or down directional arrows will provide navigation through the drop-down menu list.

TOOL BAR

Located just below the Menu Bar, the Tool Bar contains screen specific buttons and icons to assist the user. Hover over or "mouse over" the icons to display a description of the available functionality.

SCREEN TABS

Located just below the Tool Bar, Screen Tabs will display the open screens (e.g., Facility, Resident, User, and Assessment). An asterisk (*) will display on the tab to the left of the tab title if there are screen changes which need to be saved.

Screen And Column Size Control

The various screens available are divided into distinct functional sections. Search and Summary sections may be collapsed by a single click of the arrow located next to the section title. Clicking on the arrow a second time will expand the section.

Columns and sections may be resized if needed by hovering over the line which separates the sections or column headers. The cursor will create an arrow. Click and drag the "left-right arrow" icon to the desired width.

Field Types

Text

Text fields allow data to be entered manually. Data entered must adhere to the rules of the MDS Data Submission Specifications (length, use of special characters, etc.). The following is an example of a text field:

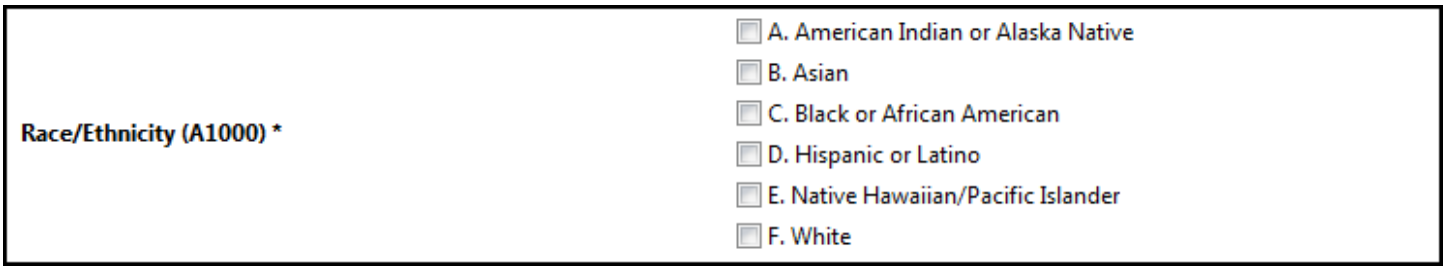
Date

Date fields are formatted for the entry of a valid date (MM-DD-YYYY) where MM = 01-12, DD = 01-31, and YYYY = the four digit year. Some date fields allow other data to be entered, such as a (-) for 'not assessed/no information.' These fields will be defined by the MDS data specifications. The following is an example of a date field:

Please Note: When the 'Enable Accessibility Features' checkbox is checked on the jRAVEN Login Screen, the calendar icon will NOT be displayed. When the 'Enable Accessibility Features' checkbox is unchecked on the jRAVEN Login Screen, there will be a calendar icon next to each date field that the user may utilize instead of manually entering a date.

Checkbox

- Checkboxes allow the selection of "yes" answers simply by clicking the box next to the appropriate value.
- Double-clicking the check box will mark the response as 'not assessed' when this is a valid response according to the data specifications.
- Clicking the check box a third time will uncheck the box for a selection of "no". The following is an example of a checkbox:



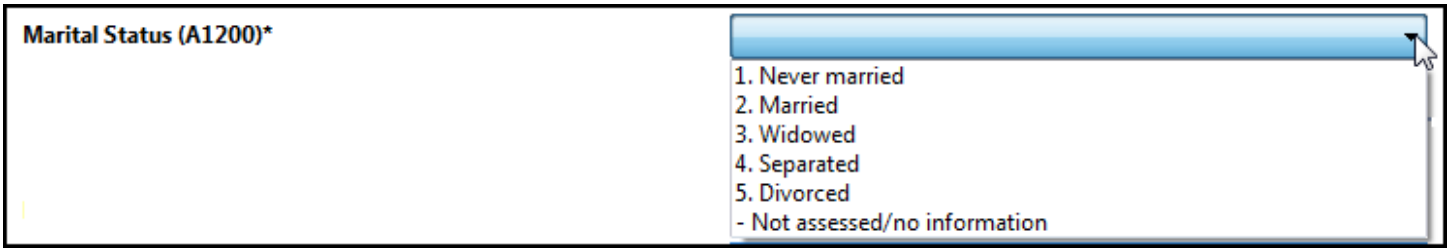
Drop-Down List

Drop-down lists contain allowable answers to a specific field.

To answer a drop-down 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 drop-down 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 following is an example of a drop-down list:



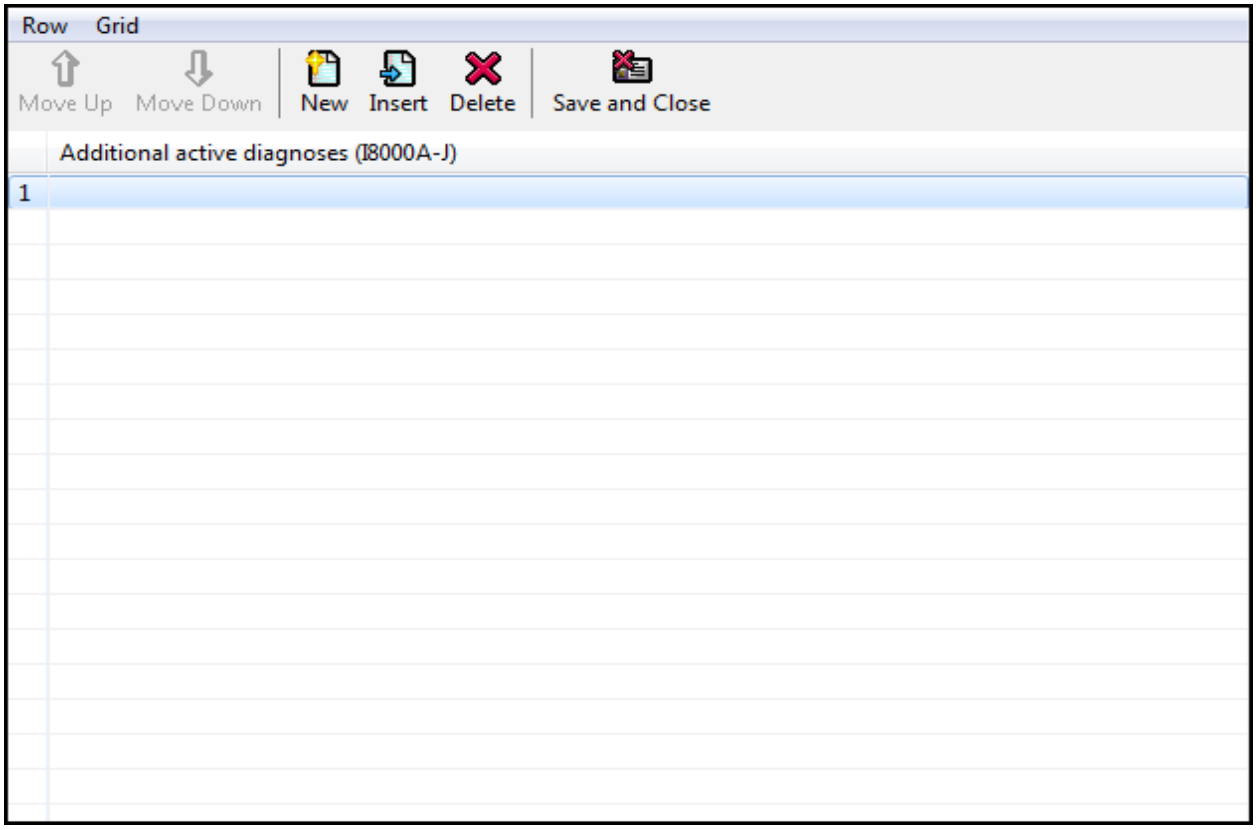
GRID

Grids should be used to enter ICD codes. Similar to text fields, grids allow data to be entered manually. Data entered must adhere to the rules of the MDS Data Submission Specifications (length, use of special characters, etc.). jRAVEN does not verify the validity of ICD-9 or ICD-10 codes and will only verify that a code has been properly formatted. For assistance with ICD coding please see the Help section of this guide.

Clicking on the grid button

will open the ICD code display window. Use the 'New' icon to add rows for additional selections or the 'Delete' icon to remove previous selections if needed.

The following is an example of the grid display window:



EDITS

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

ERRORS

This type of edit lets the user know information is missing or invalid. It must be entered or corrected before the information can be completed.

WARNINGS

This type of edit indicates there is information entered that should be verified as accurate, or serves as a reminder of how some fields should be populated.

INFORMATIONAL

This type of edit gives the user general information about the assessment.

DATA ENTRY TIPS

- For optimization of the skip patterns and/or edits, it is recommended that assessment data be entered in the order in which 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' keys 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

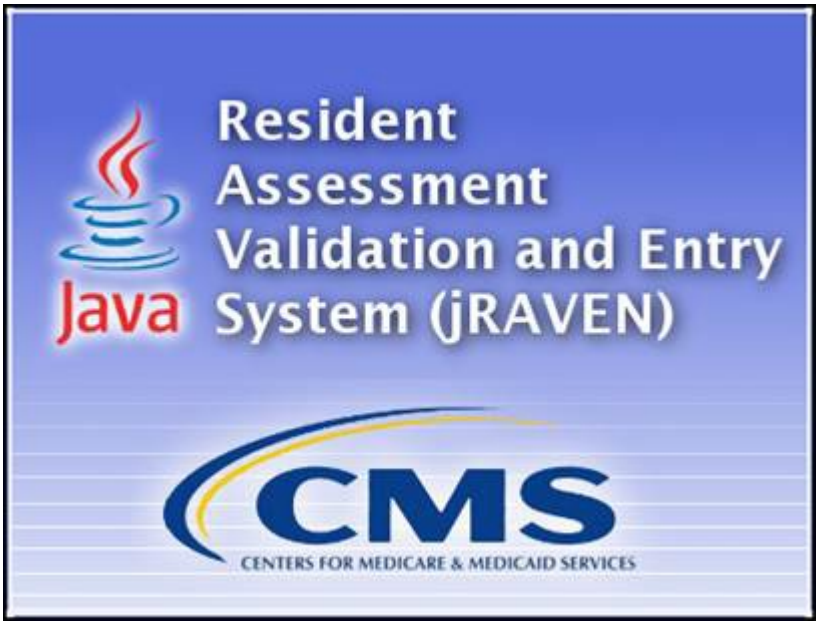
LOGIN

Please Note: The Default User account (jraven) cannot be used to create residents or assessments. For detailed instructions regarding the initial login, please consult the jRAVEN Installation Guide.

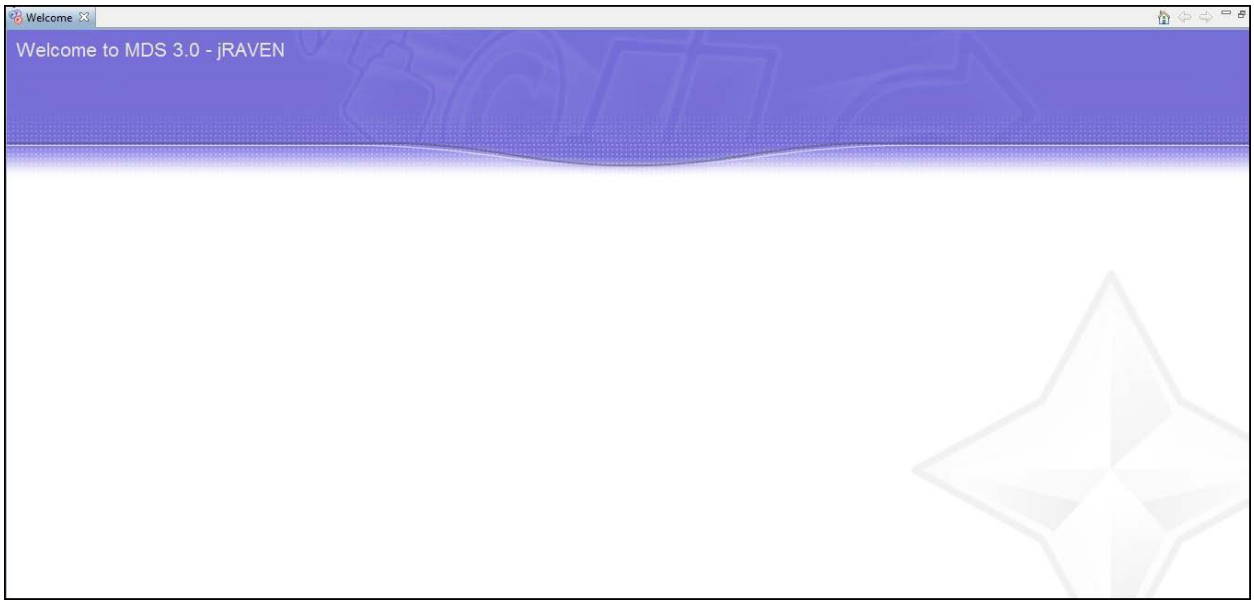
Complete the following steps to login to jRAVEN:

1. Launch the jRAVEN application from the start menu, desktop, or directory where installed.

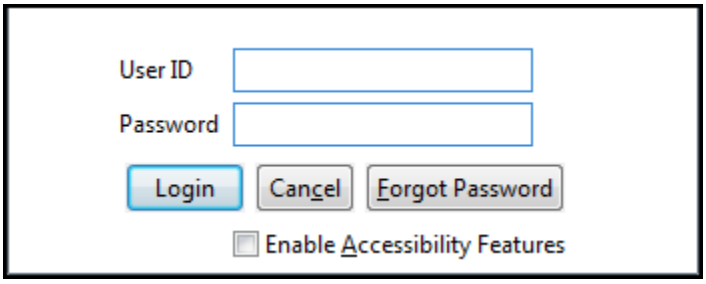
   The jRAVEN splash screen containing the CMS logo displays momentarily:



The ‘Welcome to jRAVEN’ screen will display while the program is loading. This may take a few minutes and requires no response from the user:



The ‘Login’ screen displays.

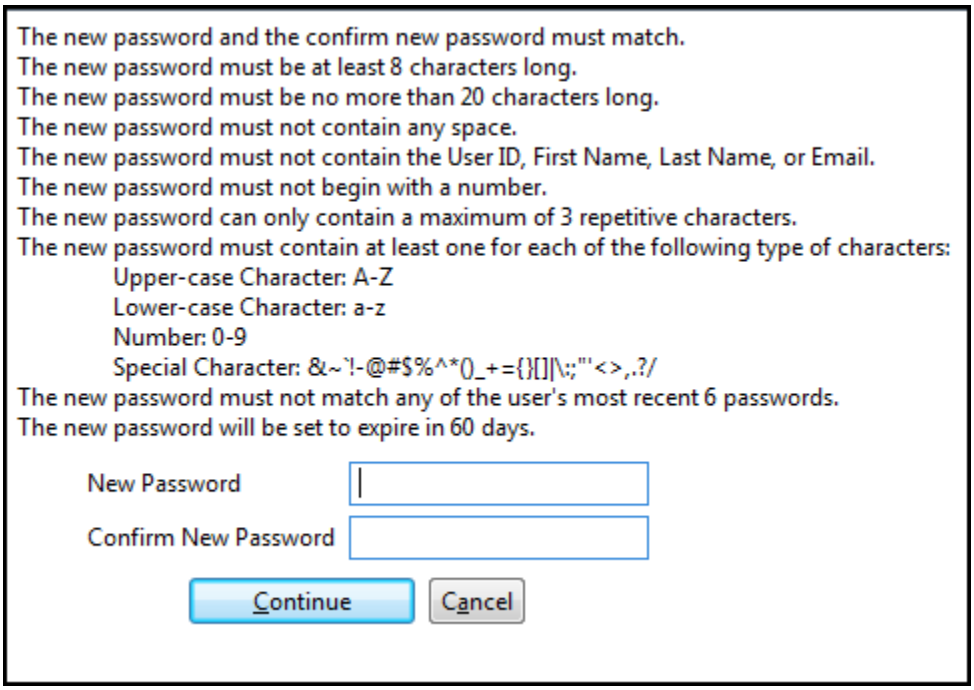


2. Enter the assigned User ID.
3. Enter the Password. When logging in for the first time, enter your assigned User ID in both the ‘User ID’ and ‘Password’ fields; these are case sensitive.
4. Click ‘Login’.

When logging in for the first time, the ‘Change Password’ screen displays 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:
  - Upper-case Character: A-Z
  - Lower-case Character: a-z
  - Number: 0-9
  - 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.

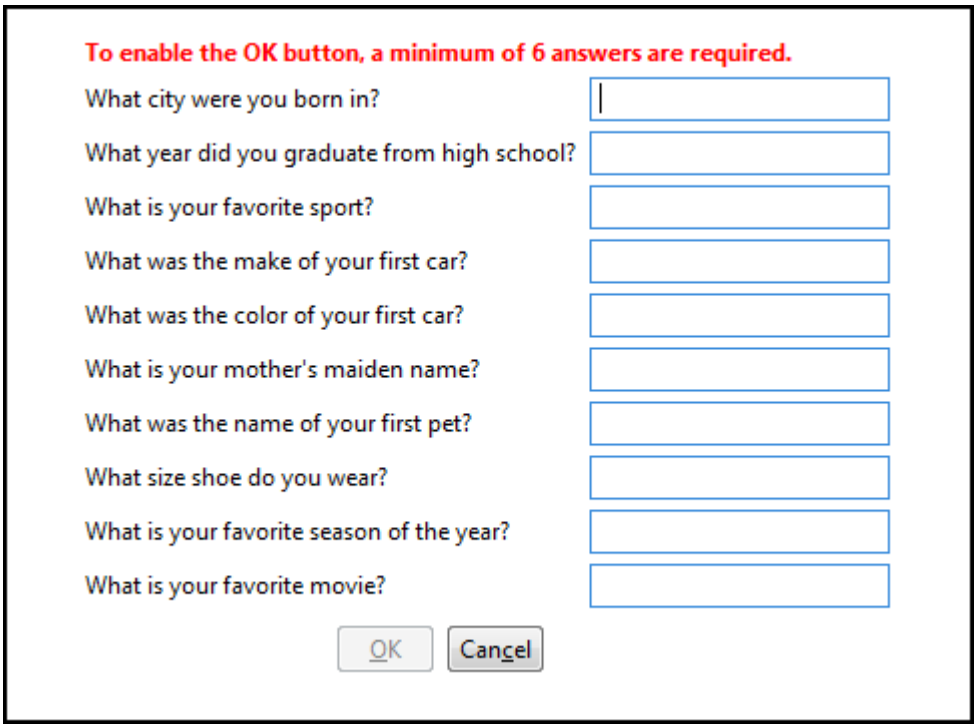


5. Enter a new password in the ‘New Password’ and ‘Confirm New Password’ fields. The password is case-sensitive and must match in both fields.
6. Select ‘Continue’ to complete the login process.

Please Note: Selecting ‘Cancel’ will display the following message: “You must change your password before accessing the system. If you do not change your password, you will be logged off the system.” Clicking ‘Cancel’ on this pop-up will take the User back to the previous ‘Change Password’ pop-up. Clicking ‘OK’ takes the User to the login screen where they must re-enter the assigned User ID in both the ‘User ID’ and ‘Password’ fields.

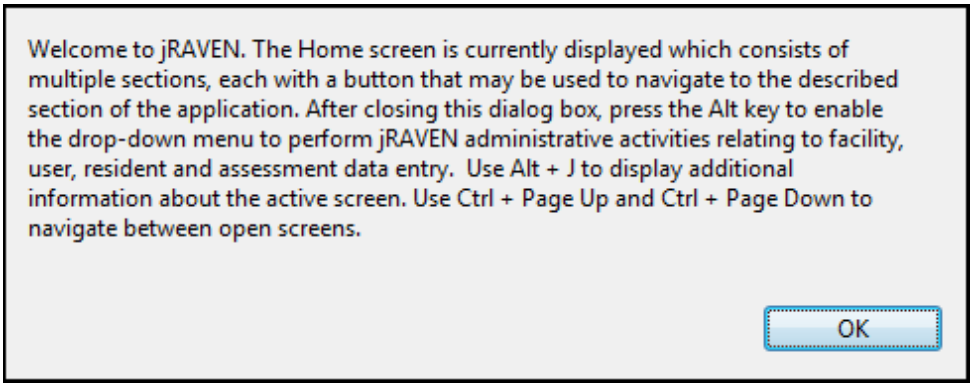
The ‘Security Questions’ screen displays the following questions:

- 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?



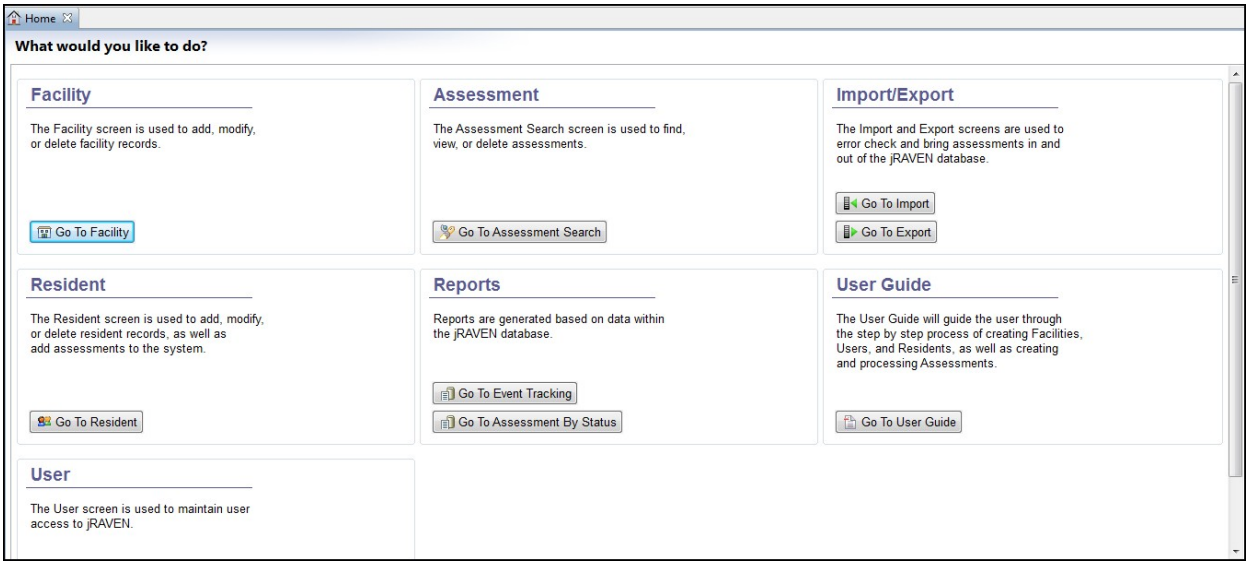
7. Complete the answers to a minimum of six (6) questions.
8. Tab to the bottom of the list to enable the 'OK' button.
9. Click 'OK' to continue to the 'Home' screen.

The following 'Welcome to jRAVEN' message will be displayed in front of the 'Home' screen only when 'Enable Accessibility Features' has been selected upon login:



HOME SCREEN

The options displayed on the 'Home' screen are dependent upon User Type. A System Administrator will have full access while a Data Entry User will have limited access. Please see the User Set up and Maintenance section for additional information regarding User Types. Below is an example of the System Administrator's 'Home' screen:

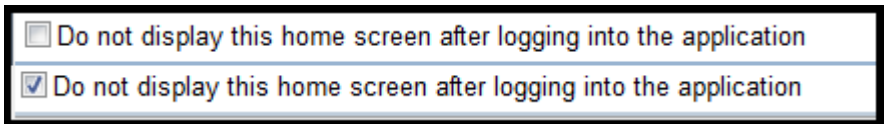


HOME SCREEN DEFAULT

By default, the 'Home' screen will be displayed upon each login. The screen may be closed by selecting the white "X" on the tab titled 'Home'. This will close the 'Home' screen for the remainder of the user's session.

To reactivate the 'Home' screen once it has been closed, select 'Help' from the Menu Bar at the upper right followed by 'Home Screen,' OR use the short-cut, Ctrl+Alt+W.

If the user does not wish to see the 'Home' screen upon each login, the default setting may be turned off by placing a checkmark in the box at the lower left corner of the screen next to the following statement: "Do not display this home screen after logging into the application". Placing a checkmark in this box will only affect the user currently logged into the application. All other users will continue to see the 'Home' screen.



FACILITY SET UP AND MAINTENANCE

The Default User must create at least one Facility before being permitted to add any further data to the jRAVEN application. Please consult the jRAVEN Installation Guide for detailed instructions regarding the initial login and set up by the Default User.

The 'Facility Information' screen allows users, dependent upon their User Type, to set up and modify facilities. The 'Facility Information' screen displays in two sections:

- Facility Summary (on the left)
- Facility Detail (on the right)
- All facility data entry is done in this section.

ADD A FACILITY

Complete the following steps to create a new facility:

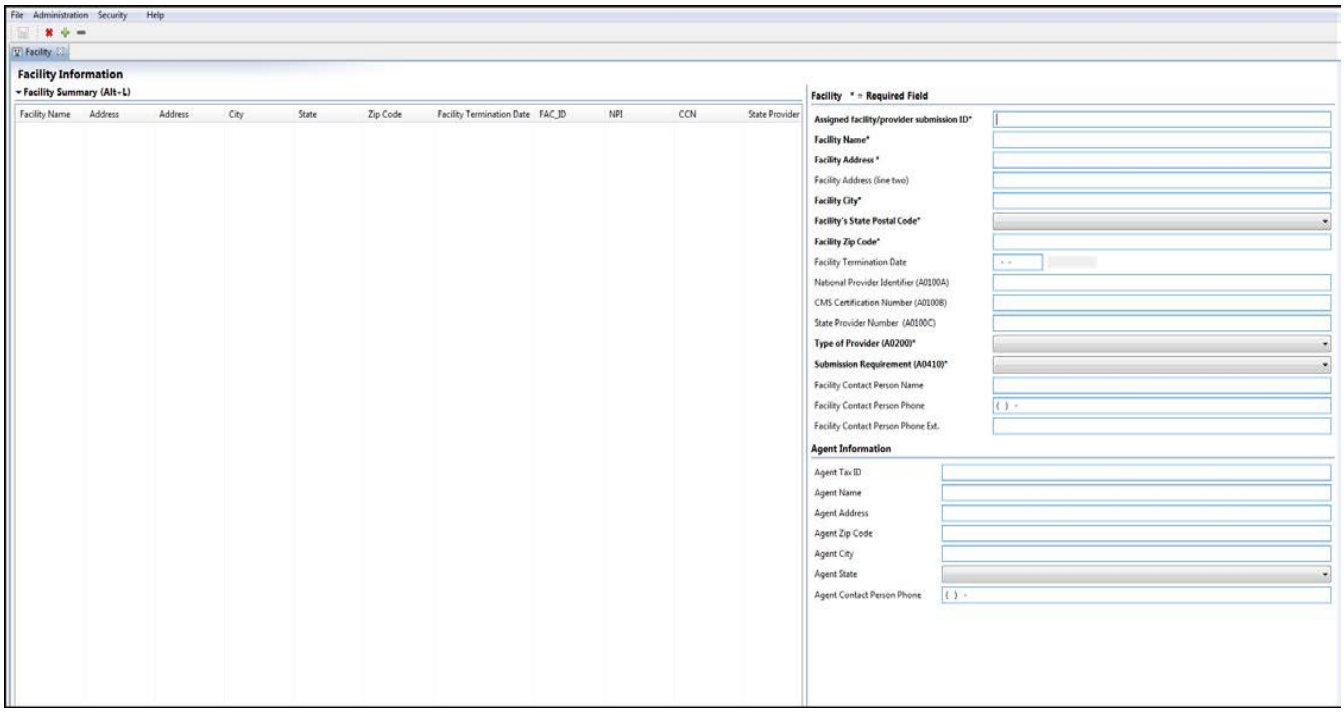
1. Select 'Facility' from the Administration drop-down on the Menu Bar or 'Go To Facility' from the 'Home' screen. The 'Facility Information' screen displays.

2. Enter the appropriate facility information into the Facility Detail section. Required fields display on the screen in bold type with an asterisk.
3. 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.
4. To add additional facilities, click the 'New' icon, enter data and click the 'Save' icon.

MODIFY A FACILITY

Complete the following steps to modify an existing facility:

1. Locate and highlight the facility in the Facility Summary section.



2. Make the appropriate changes in the Facility Detail section on the right side of the screen.
3. Click the 'Save' icon.

DELETE A FACILITY

Complete the following steps to delete a facility:

1. Locate and highlight the facility in the Facility Summary section.
2. Click the 'Delete' icon.
   - Only a System Administrator can delete a facility.
   - Deletions cannot be made if Users, Residents, or Assessments are currently associated to a facility.

MDS 3.0 RUGS - GROUPER CONFIGURATION

*Please note that the Grouper Configuration screen is for **RUG** parameters only. There is **no** set up required on these screens for the new **PDPM** Grouper going into effect on 10/1/2019.*

Once the assessment has been completed and you select "Save & Validate", the software will calculate the applicable codes and return the values in the required fields in Section Z.

RUGS GROUPER CONFIGURATIONS

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 and 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 **RUG** calculations, the RUG-IV grouper Logic Version 1.04 must be used with the number of groups (RUG Model) 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.

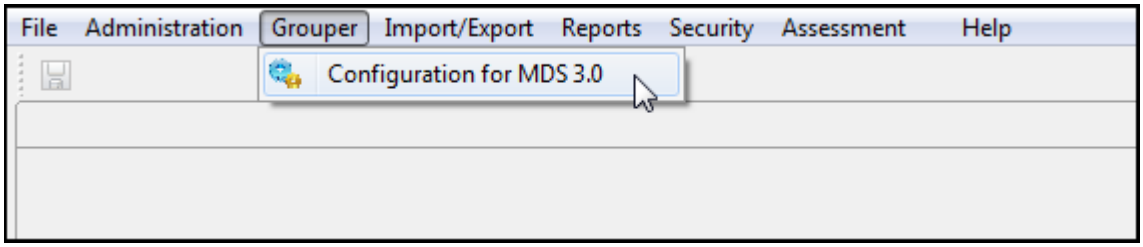
NOTE: The Case Mix Index Set field defaults to "E01 Medicare SNF PPS 66 Group Rural". Facilities will need to modify the setting as applicable.

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 parameters are 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 MDS 3.0 Technical Information webpage (https://www.cms.gov/medicare/quality-initiatives- patient-assessment-instruments/nursinghomequalityinits/nhqimds30technicalinformation.html).

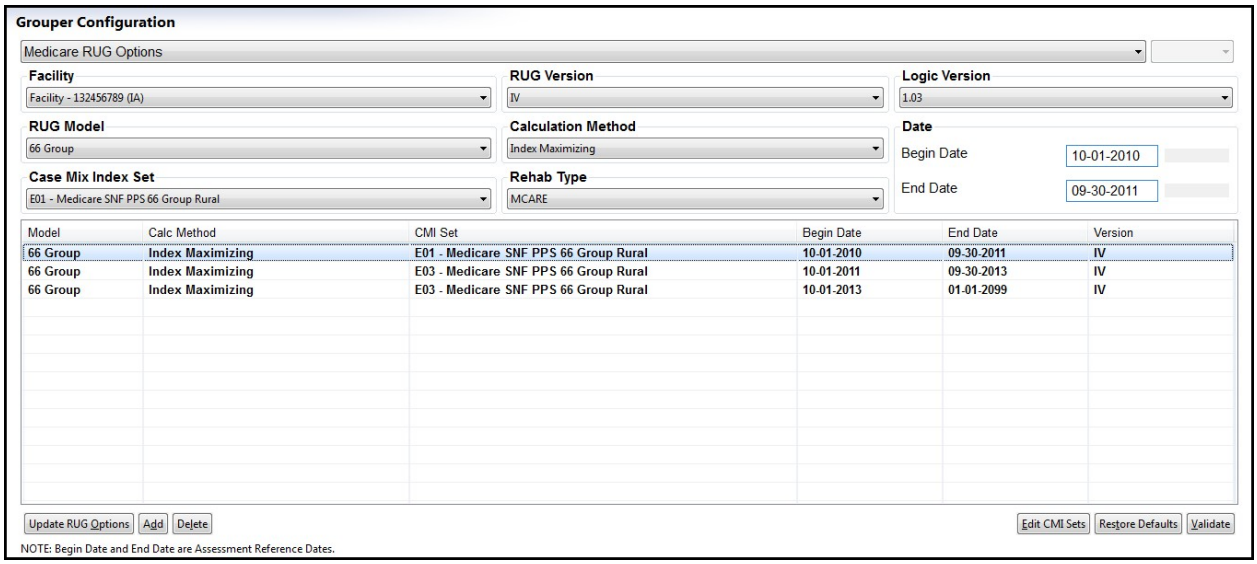
CONFIGURATION FOR MDS 3.0

To view or modify the Grouper Configuration for MDS 3.0, select 'Configuration for MDS 3.0' from the Grouper drop-down on the Menu Bar.



The Grouper configuration window displays and contains the following fields:

- Medicare RUG Options
- State/Medicaid RUG Options
- Facility
- RUG Version
- Logic Version
- RUG Model
- Calculation Method
- Date (Begin/End)
- Case Mix Index Set
- Rehab Type



RUG Option

The RUG Options drop-down allows the user to switch between the grouper configuration options for Medicare RUGs (MDS 3.0 items Z0100 and Z0150 prior to 10/1/2019) 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.

Facility

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

RUG Version

Prior to 10/1/2019 for Medicare RUG Options, this value should always be IV; this is due to the fact that RUG-IV is required for the Z0100 and Z0150 calculations. State/Medicaid RUG Options are dependent upon the requirements set forth by the state where the currently-selected facility is located. Please contact your State RAI Coordinator for additional information if needed.

Logic Version

Currently, only one logic version is available for each RUG version. The logic version is automatically populated, depending on the RUG version that is selected to 1.04.

RUG Model

The RUG Model drop-down list reflects all grouping models available for the currently-selected RUG version. Please contact your State RAI Coordinator for additional information regarding which selections to make if needed.

Case Mix Index Set

The Case Mix Index Set drop-down list reflects 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. Please contact your State RAI Coordinator for additional information regarding which selections to make if needed.

Calculation Method

The Calculation Method drop-down list reflects the selected method used for RUG calculations. The Centers for Medicare and Medicaid Services uses index maximizing.

DATE RANGE

The Date Range selection allows users to determine sets of parameters to be used for specific target dates. For example, a target date of 10-15-2011 would use the parameters in the grouper configuration set that contains 10-15-2011 within its beginning and ending date range. Note 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 Rehab Type drop-down reflects all rehabilitation type parameters available for use with the currently selected RUG Version. Please contact your State RAI Coordinator for additional information regarding which selections to make if needed.

UPDATE RUG OPTIONS

The Update RUG Options button [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. If the default option set does not meet the user's needs, it must be updated with additional option sets as needed.)

RESTORE DEFAULTS BUTTON

The Restore Defaults button [Restore Defaults] 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.

VALIDATE BUTTON

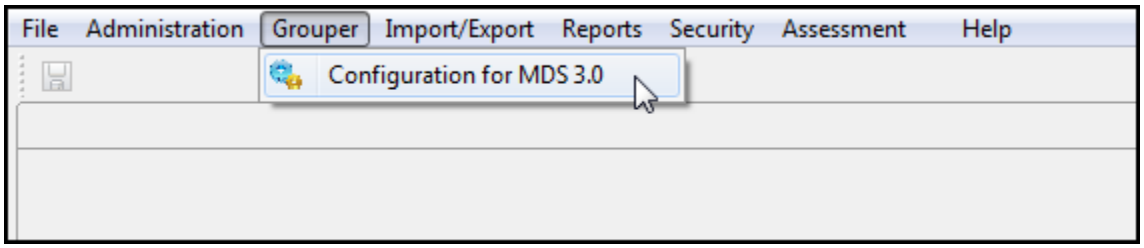
The Validate button [Validate] will analyze the date ranges of the option sets shown in the table. Any gaps will be reported. A good configuration is one that has all possible dates covered from 10-01-2010 onward to 12-31-2020 (always assign your last option set with an end date of 12-31-2020.)

ADD AN OPTION SET

When adding a new option set, the new set being added cannot have a start or end date which overlaps existing option sets for the selected facility.

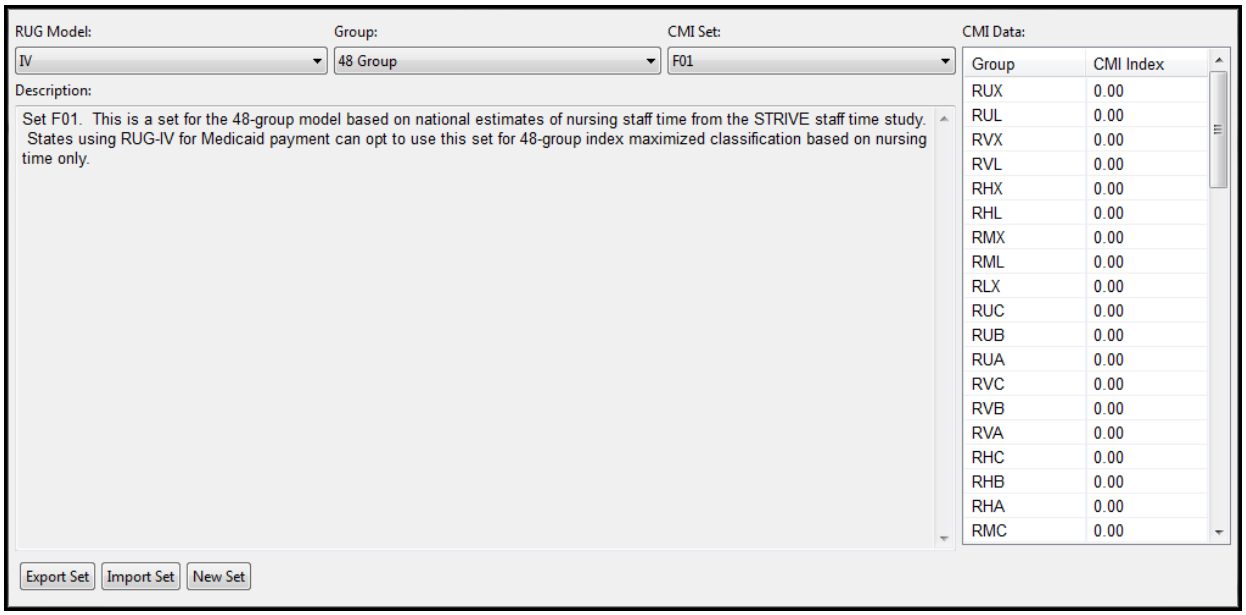
To add a new option set, complete the following:

1. Select 'Configuration for MDS 3.0' from the Grouper drop-down on the Menu Bar.



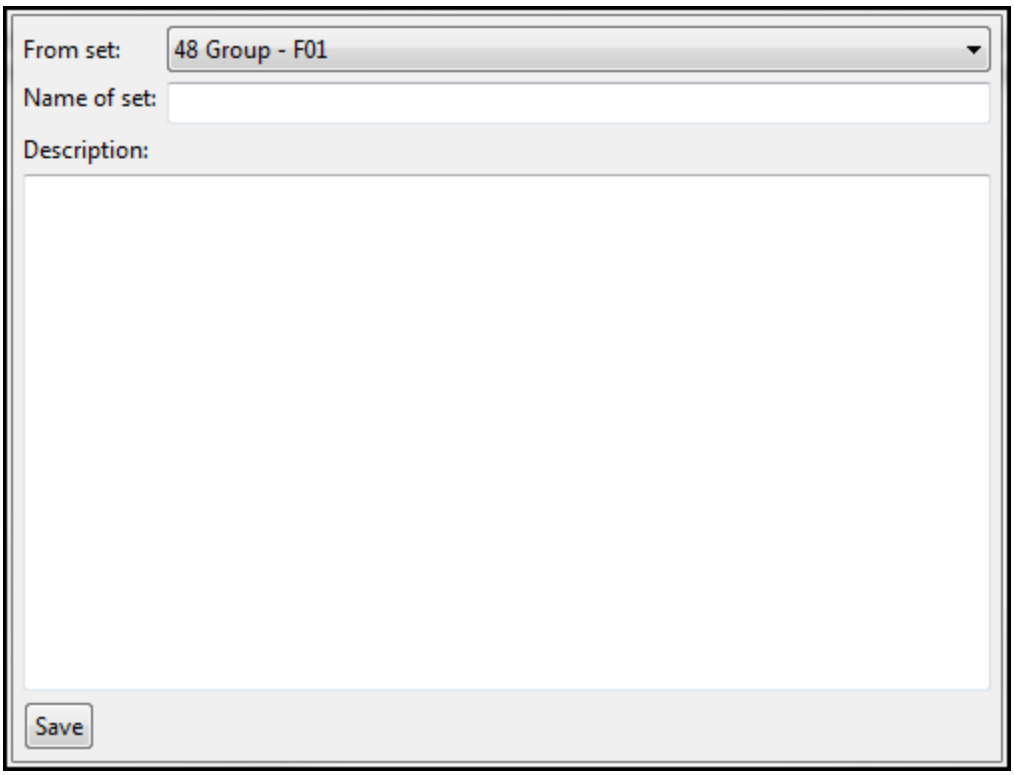
2. Select the Edit CMI Sets [Edit CMI Sets] button from the bottom of the 'Grouper Configuration' screen.

   The 'Edit CMI Values – (RUG Version)' screen will be displayed:



3. Select the New Set

button to display the 'New Set' screen.



a) **From Set:** This drop-down box will allow the user to choose from each existing set for the selected RUG version. For ease of use, a new set may be created based on existing set configurations.

b) **Name of Set:** This field should be used to enter a custom name of the set being created. For processing purposes, this name may only be alphanumeric (letters and numbers). This field may not be left blank.

c) **Description:** This optional field will allow the user to enter any notes or additional information which relates to the new configuration set.

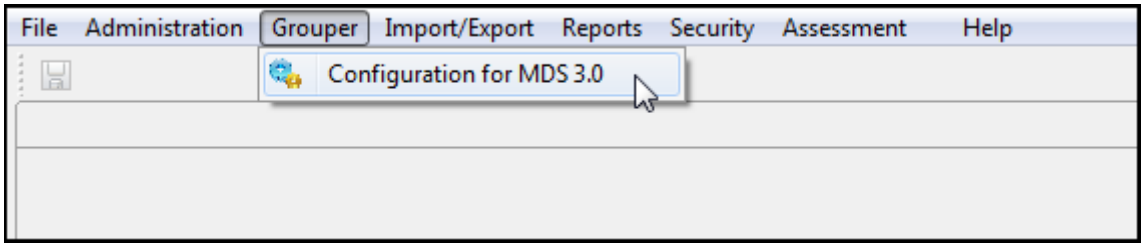
4. Select a Group.
5. Enter a Name and Description.
6. Select the Save

button.

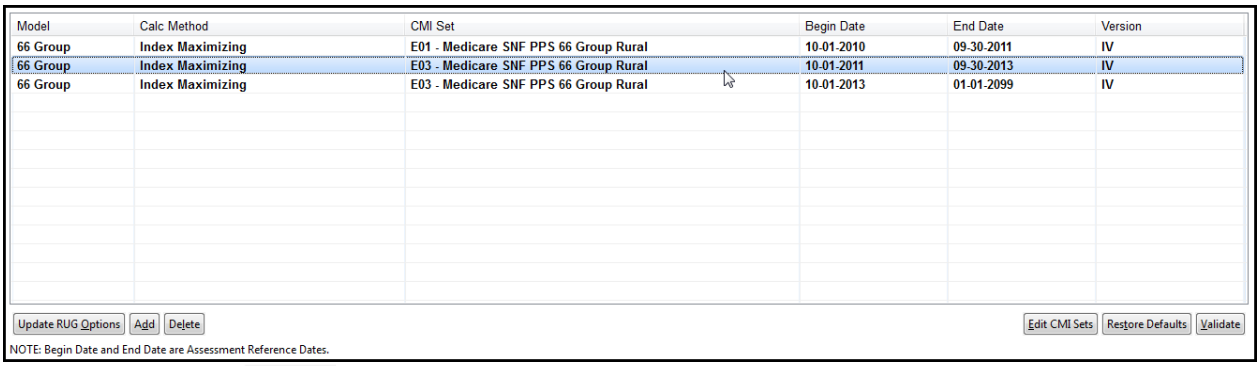
DELETE AN OPTION SET

To delete an existing option set, complete the following:

1. Select 'Configuration for MDS 3.0' from the Grouper drop-down on the Menu Bar.



2. Select (highlight) the configuration set you would like to remove from the display list in the center of the Grouper Configuration screen.



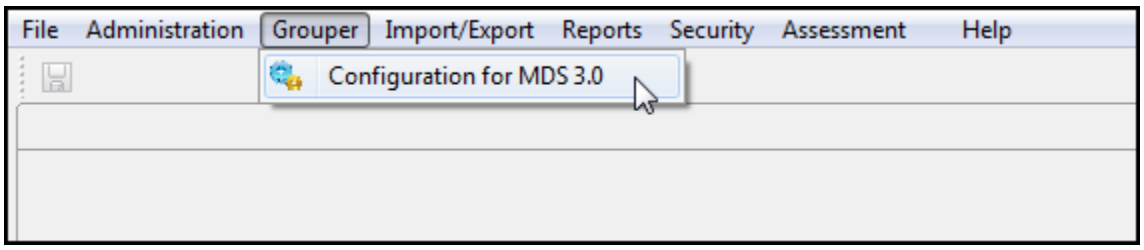
3. Select the Delete button Delete.

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. Users are NOT able to delete default option sets.

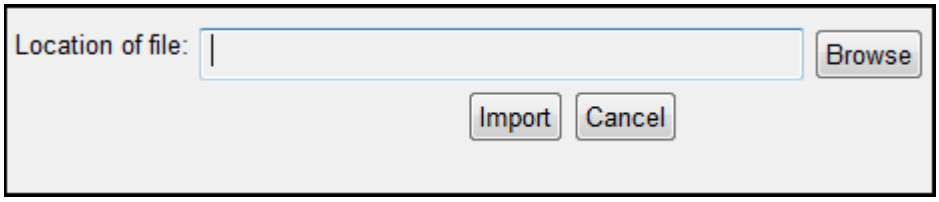
IMPORT A CMI SET

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 Import a new CMI set:

1. Select 'Configuration for MDS 3.0' from the Grouper drop-down on the Menu Bar.



2. Select the Edit CMI Sets Edit CMI Sets button from the bottom of the 'Grouper Configuration' screen.
3. Select the Import Import Set Set button to display the 'Import CMI Values' screen.

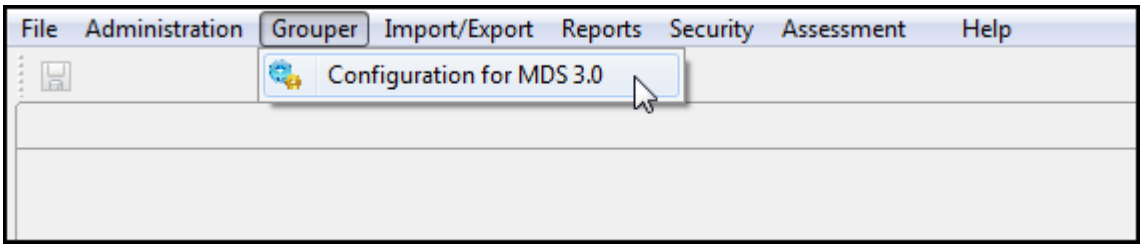


4. Choose the location of the CMI set to import by selecting the Browse [Browse] button.
5. Select the Import [Import] button to add the file's contents to jRAVEN.

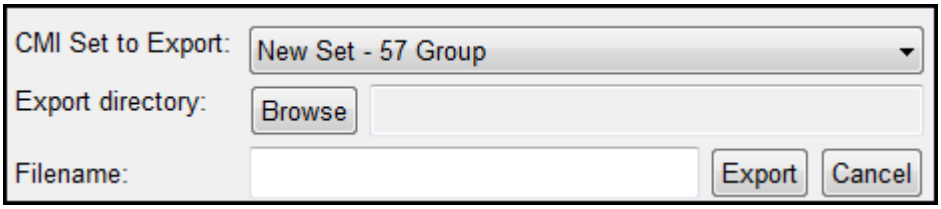
Export a CMI Set

Complete the following steps to Export a custom CMI set:

1. Select 'Configuration for MDS 3.0' from the Grouper drop-down on the Menu Bar.



2. Select the Edit CMI Sets [Edit CMI Sets] button from the bottom of the 'Grouper Configuration' screen.
3. Select the Export Set [Export Set] button to display the 'Export CMI Values' screen.



4. Select the appropriate set from the 'CMI Set to Export' drop-down.
5. Select the Browse [Browse] button to designate the directory or location where you wish to save your export file.
6. Enter a Filename. File extensions are not needed.
7. Select the Export [Export] button to complete the export process. You will receive a confirmation message to indicate that the export process has completed successfully.

USER SETUP AND MAINTENANCE

USER TYPES

To enhance the security of data, there are four User Types available within the jRAVEN application, each having a unique level of access:

- Default User (jraven)
- System Administrator
- Data Entry
- View Only

The Default User ID may only be used to add or modify Facilities and Users. This ID should be held by someone who does not need access to Resident information. After successfully creating at least one Facility and one System Administrator account, the Default User should log out of the application. Note, the Default User does not have access to the full jRAVEN menu. Please consult the jRAVEN Installation Guide for detailed instructions regarding the initial login and set up by the Default User.

FUNCTIONALITY BY USER TYPE

A Security Administrator will have the highest level of access and a View-Only User will have the lowest. The table below provides a summary of the functions available to each User Type. An "X" denotes that a function will be available to that particular User Type unless otherwise specified. Note, you will not see the Default User in this summary, as it may only be used to add/maintain facility and user information.

Features/Functionality	System Administrator	Data Entry	View-Only
Assessments	Add/Edit/Delete	Add/Edit	-
Create Inactivation Requests	X	-	-
Create Modification Requests	X	-	-
Export Files	X	-	-
Import Files	X	-	-
Maintain Facility Information	Add/Edit/Delete	Edit	-
Maintain Resident Information	Add/Edit/Hide/Delete	Add/Edit	-
Maintain User Information	Add/Edit/Delete	-	-
Perform Data Entry for MDS Item Set	X	X	-
Print Assessment Report	X	X	X
View Assessment Data Entry By Status	X	X	X
View Event Tracking Report	X	-	-
View Hidden Residents/Assessments	X	-	-
View User List	X	-	-
View Assessments Entered by Any User	X	X	X

ADD A USER

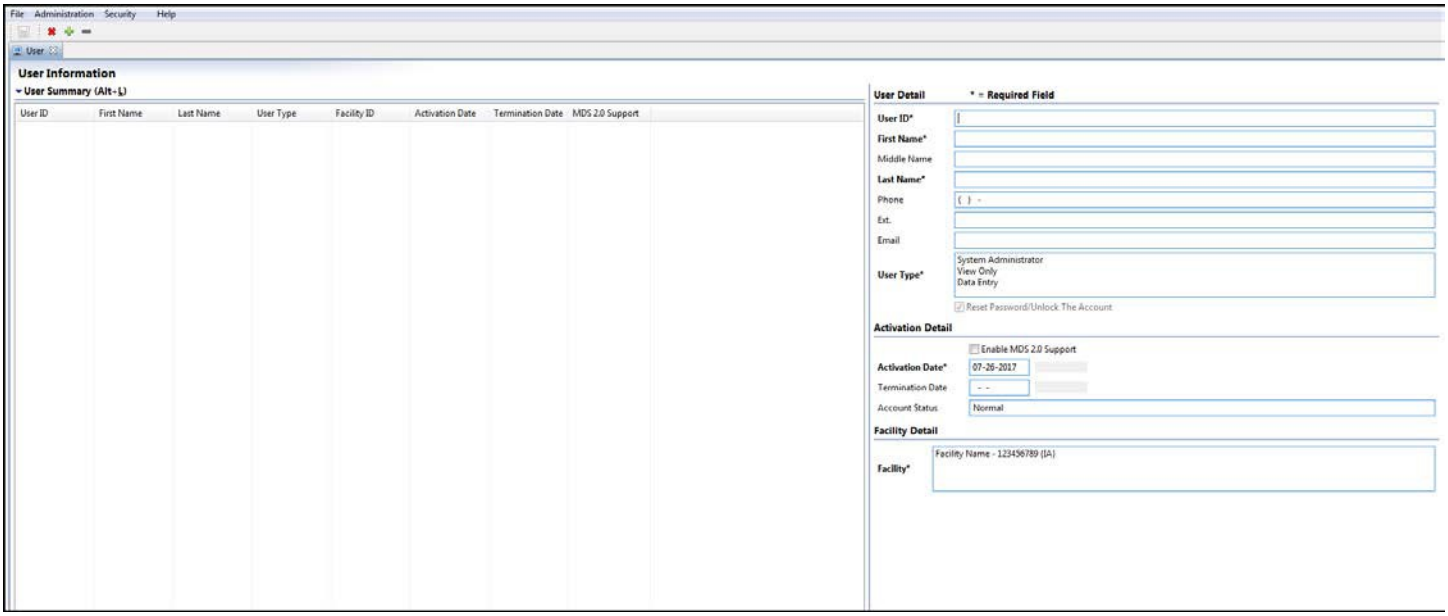
The 'User Information' screen allows users, dependent upon their User Type, to modify and set up new user accounts. The term 'user' refers to the individuals who will be viewing or entering data into the jRAVEN application.

The 'User Information' screen displays in two sections:

- User Summary (on the left)
- User Detail (on the right). All user data entry is done in this section. Complete the following steps to add a new user:

1. Select ‘User’ from the Administration drop-down on the Menu Bar or ‘Go to User’ from the ‘Home’ screen.

The ‘User Information’ screen displays.

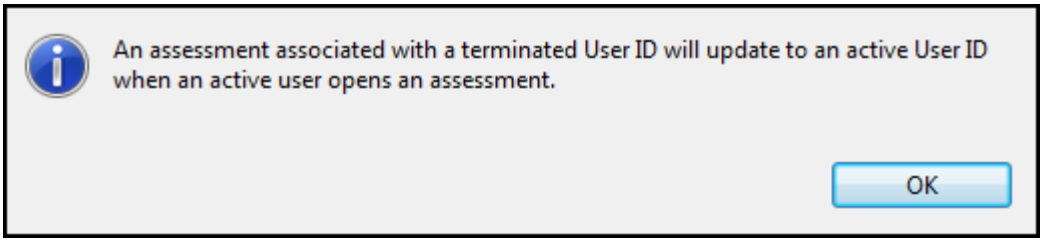


2. Enter the appropriate user information into the User Detail section. Required fields display on the screen in bold type with an asterisk.
3. After entering all required user information, click the ‘Save’ icon. Saved user information will display in the User Summary section on the left side of the screen.
4. To add additional users, click the ‘New’ icon, enter data and click the ‘Save’ icon.

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 there is only one System Administrator and that person terminates his/her position, a new System Administrator must be set up prior to entering the Termination Date for the existing System Administrator.

If a Termination Date is entered for a user who has assessments in the database, a Termination Date message box will be displayed, advising that any assessments associated with the terminated User ID will be updated to an active User ID when an active user opens the assessment.



MODIFY A USER

Complete the following steps to modify an existing user:

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

DELETE A USER

User ID's may not be deleted if the user has created or modified Facility, Resident, or Assessment data. User ID's which are successfully deleted may not be reused. Use of the Termination Date field is recommended if a user is no longer valid (e.g., no longer works for the facility).

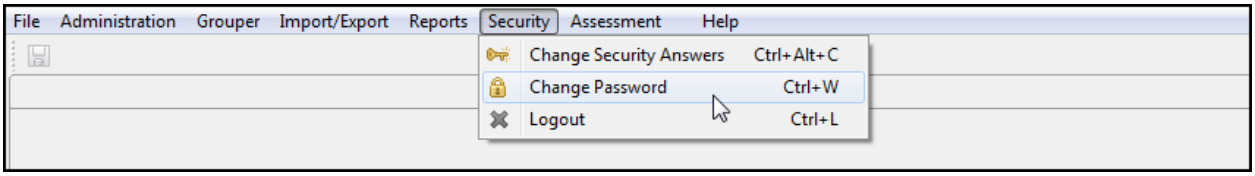
Complete the following steps to delete a user:

1. Locate and highlight the user in the User Summary section.
2. Click the 'Delete' icon.

CHANGE PASSWORD

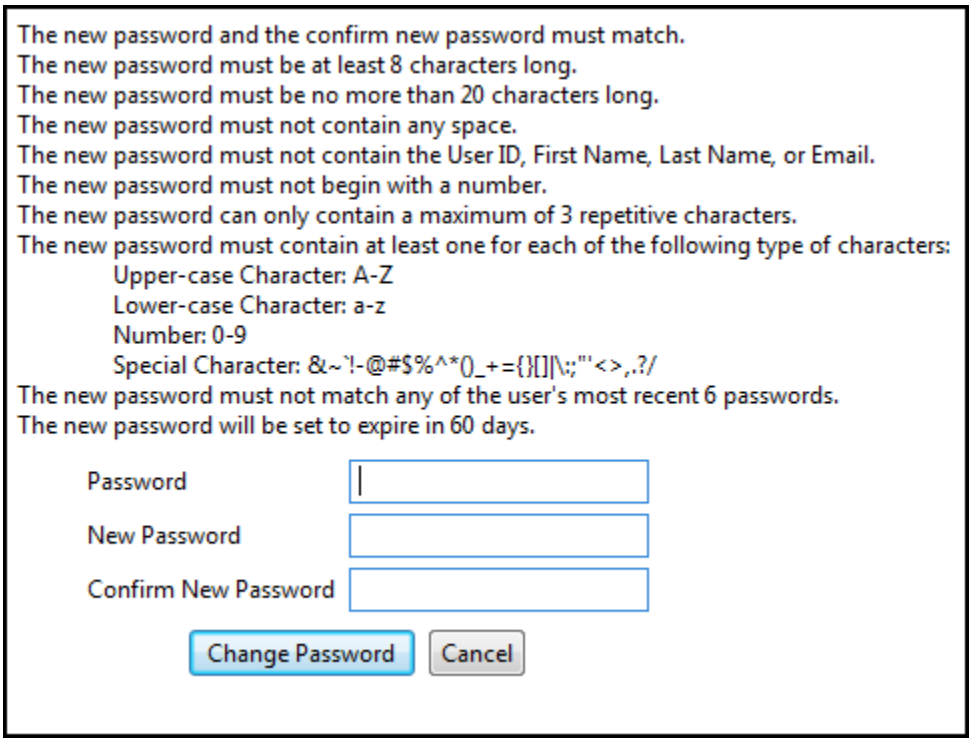
User passwords may be changed at any time. Complete the following steps to change a password:

1. Login to jRAVEN.
2. Select 'Change Password' from the Security drop-down on the Menu Bar:



The 'Change Password' screen displays, along with the following rules:

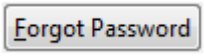
- The new password and the confirm new password must match.
- The new password must be at least 8 characters long.
- The new password must be no more than 20 characters long.
- The new password must not contain any space.
- The new password must not contain the User ID, First Name, Last Name, or Email.
- 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: &~`!-@#$%^*()_+={}[]|\:;'"<>,.?/
- 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.



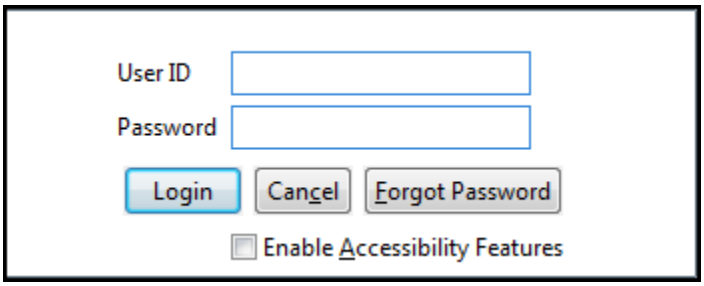
3. Enter the current password in the ‘Password’ box.
4. Enter a new password in the ‘New Password’ and ‘Confirm New Password’ box.
5. Select ‘Change Password’. Selecting ‘Cancel’ will close the ‘Change Password’ screen and will not change the existing password.

FORGOT PASSWORD

Complete the following steps if you have forgotten your password:

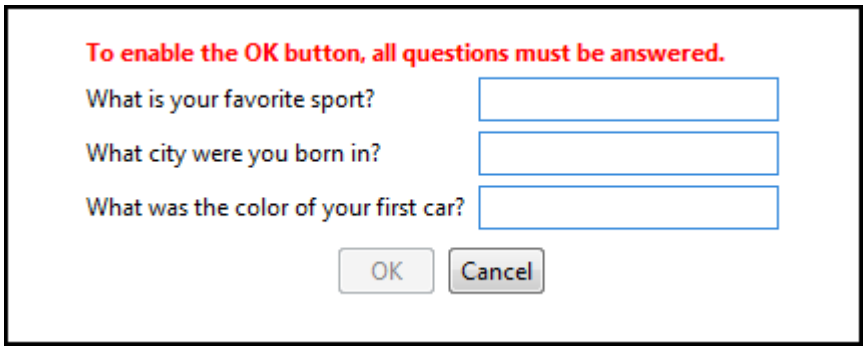
1. Enter the User ID and select the ‘Forgot Password’ 

button.



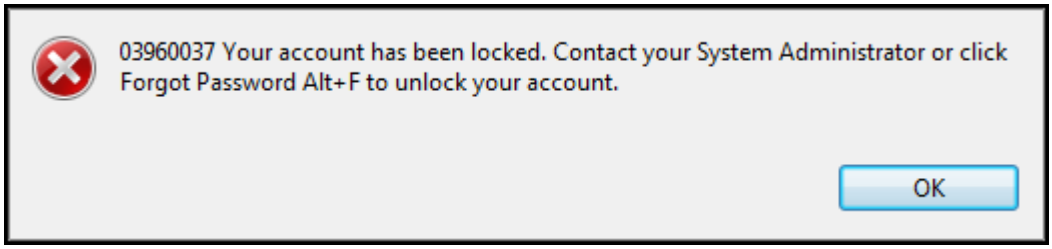
The ‘Security Questions’ pop-up window displays with three (3) of the security questions which were answered during the initial setup of the given User ID:

2. Enter responses to the questions provided.
3. Select ‘OK’ to continue to the ‘Change Password’ screen. Selecting ‘Cancel’ will close the security questions and return to the login screen.



LOCKED USER ACCOUNT

jRAVEN will allow three (3) login attempts prior to locking a user account and removing the ability to login. The following message will be displayed when a user account becomes locked: "Your account has been locked. Contact your System Administrator or click Forgot Password Alt+F to unlock your account."



As stated in the error message, there are two options when a user account has become locked. Click 'OK' to return to the 'Login' screen. Follow the instructions for Forgot Password to unlock the account.

The user may also contact a System Administrator who can reset the account using the following steps:

1. Select 'User' from the Administration drop-down on the Menu Bar:

2. Locate and highlight the locked user account in the User Summary section. Locked user accounts will display in bold type.
3. Check the 'Reset Password/Unlock The Account' checkbox in the User Detail section on the right side of the screen.
4. Click the 'Save' icon.

The user account is now unlocked. The password has been reset to match the User ID. Please note the password is case-sensitive and must match in both the 'User ID' and 'Password' fields.

Please Note: In the event the primary System Administrator account becomes locked, a secondary System Administrator OR the Default User (User ID = jraven) may log in and reset the account by following the steps defined above.

If the System Administrator account cannot be unlocked using the Forgot Password instructions or the Locked User Account instructions, please contact the QIES Help Desk for further assistance. The Help Desk will reset the Default User account (User ID=jraven) which may then be used to unlock the account or set up a new System Administrator.

RESIDENT SETUP AND MAINTENANCE

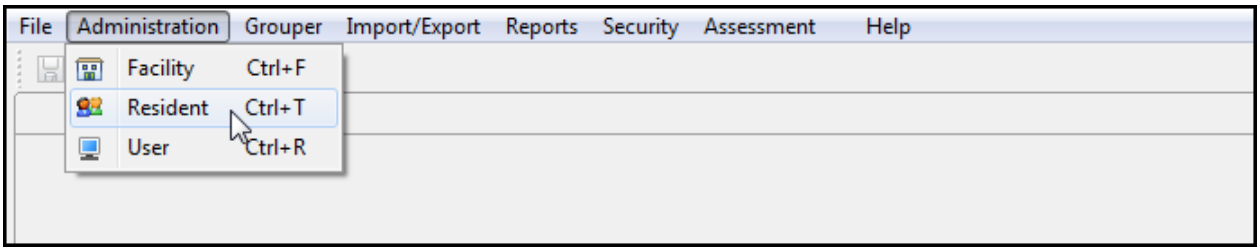
The 'Resident Information' screen allows users, depending on User Type, to add, edit, delete and search for residents. The 'Resident Information' screen displays in 4 sections:

- Search Criteria (top of the screen)
- Resident Summary (on the left)
- Resident Detail (on the right). All resident data entry is done in this section.
- Actions (on lower right)

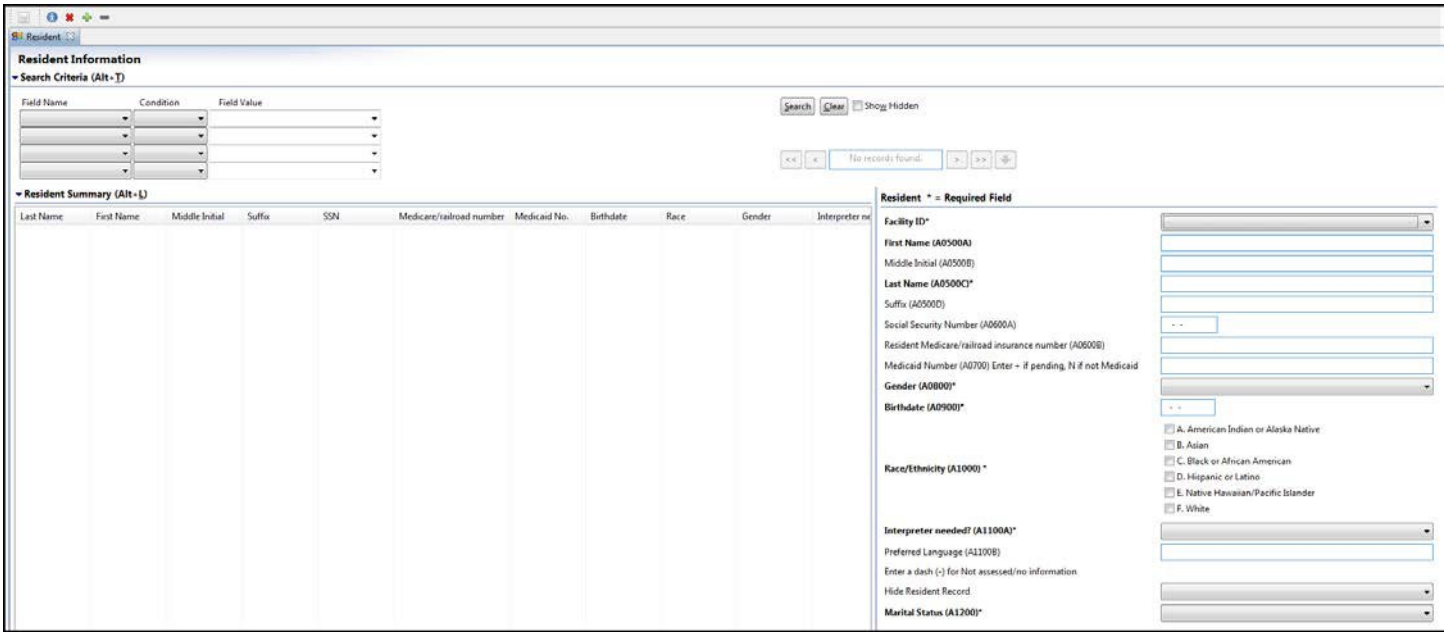
ADD A RESIDENT

Complete the following steps to add a new resident:

1. Select 'Resident' from the Administration drop-down on the Menu Bar:



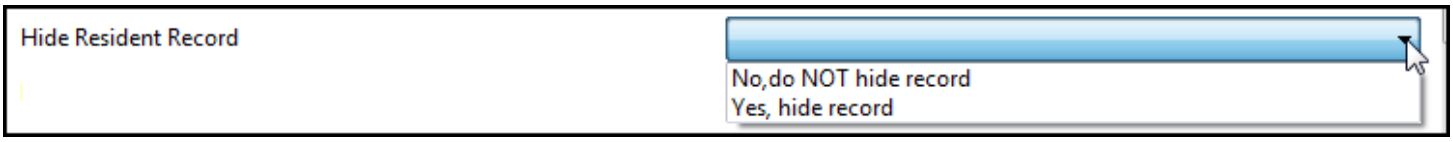
The 'Resident Information' screen displays:



2. Enter the appropriate resident information into the Resident Detail section. Required fields display on the screen in bold type with an asterisk.
3. After entering the required resident information, click the 'Save' icon. Saved resident information will display in the Resident Summary section.
4. To add additional residents, click the 'New' icon, or utilize the 'Add Resident' Add Resident button located in the Actions section on the right side of the screen. Enter data and click the 'Save' icon.

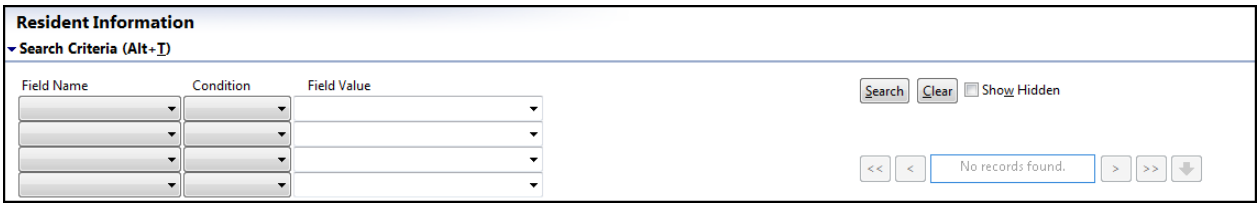
HIDE A RESIDENT RECORD

The 'Hide Resident Record' field located in the Resident Detail section allows users to hide records that no longer need to be accessed. 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. To hide a resident's records, select the "Yes, hide record" option within the Resident Detail section.



RESIDENT SEARCH

The 'Search Criteria' section is located at the top of the 'Resident Information' screen. To retrieve all existing resident records, leave the Search Criteria blank and click the 'Search' Search button.



Complete the following steps to retrieve one or more records based on Search Criteria:

1. Select criteria from the 'Field Name' and 'Condition' lists.
2. Enter a 'Field Value'.
3. Select the box next to 'Show Hidden' to include records marked 'Yes, hide record' in the Resident Details section.
4. Click the 'Search' button.
5. Click the 'Clear' button to remove search criteria and begin a new resident search.

Please Note: A System Administrator will 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 within the jRAVEN application.

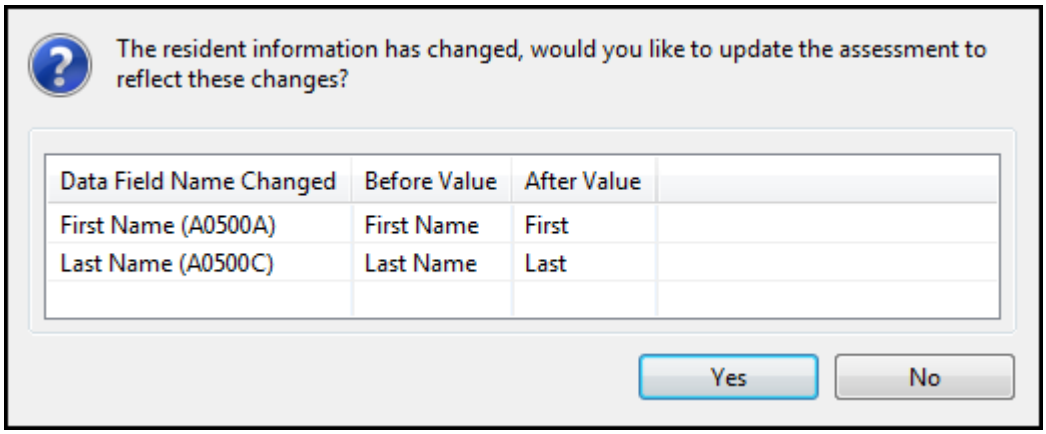
MODIFY A RESIDENT

Complete the following steps to modify an existing resident:

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

The following message will display on the 'Assessment Search' screen when opening an existing assessment after resident information has been modified: "The resident information has changed, would you like to update the assessment to reflect these changes?"

The user will be shown the field name values currently in the assessment (Before Value), as well as the value after selecting 'Yes' on the Resident Data Updated pop-up window (After Value).



- Selecting 'Yes' will update the resident information within the selected assessment record to reflect what is in the Resident Detail section of the 'Resident Information' screen.
- Selecting 'No' will open the record without updating resident information within the selected assessment record.

Please Note: This message will continue to be displayed each time an assessment is opened after modifying the resident data until 'Yes' is selected.

DELETE A RESIDENT

Complete the following steps to delete a resident:

1. Locate and highlight the resident in the Resident Summary section.
2. Click the 'Delete' icon or the 'Delete Resident' Delete Resident button in the Actions section of the 'Resident Information' screen.

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

MOVE A RESIDENT

In the event a resident is moved from one MDS facility to another within the same corporation, it is necessary to reassign the resident to the appropriate facility. Before reassigning a resident to a new facility, ALL existing assessments must be in an 'Exported' or 'Outdated' status.

VERIFY ASSESSMENT STATUS

Complete the following steps to verify the status of a resident's assessments:

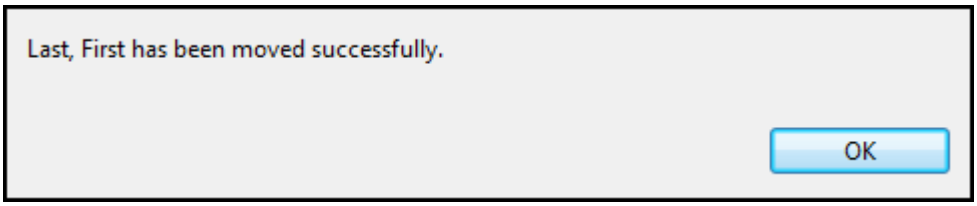
1. Perform an assessment search by following the Assessment Search procedure. It is recommended that the 'show hidden' checkbox be applied to ensure all existing records are shown.
2. If all assessments found have an 'Exported' or 'Outdated' status, proceed to Assign a New Facility ID below.
3. If 'Non-Exported' assessments are found, enter any remaining applicable data to complete the assessment record. Required fields will appear in bold type in the 'Navigator' section of the 'Assessment' screen. You may also choose to delete an assessment if it has been entered in error.
4. Click the 'Save and Validate' icon.
5. If the assessment is complete, you will have achieved a status of 'Outdated' or 'Export Ready'. Close the assessment.
6. For 'Export Ready' assessments, follow the Export procedure to set the status appropriately.

ASSIGN A NEW FACILITY ID

Complete the following steps to assign a resident to a new facility:

1. Select 'Resident' from the Administration drop-down on the Menu Bar.
2. The 'Resident Information' screen displays.
3. Perform a Resident Search for the resident you wish to move.
4. Locate and highlight the resident to be reassigned in the Resident Summary section.
5. Verify the resident information in the Resident Detail section on the right.
6. Select the new facility from the 'Facility ID' drop-down.
7. Click the 'Save' icon.

   When a resident has been successfully moved, the following confirmation message will be displayed: "(Resident Name) has been moved successfully."

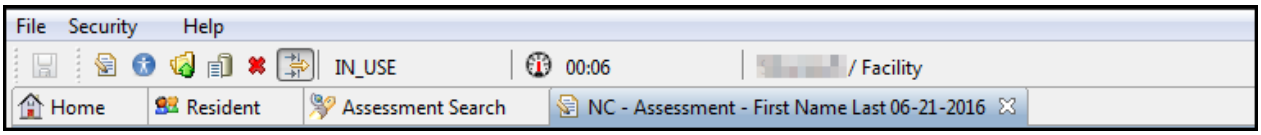


8. Click 'OK' to complete the resident move process and assign the new facility information. Saved resident information will display in the Resident Summary section of the Resident Screen.

ASSESSMENT NAVIGATION AND MAINTENANCE

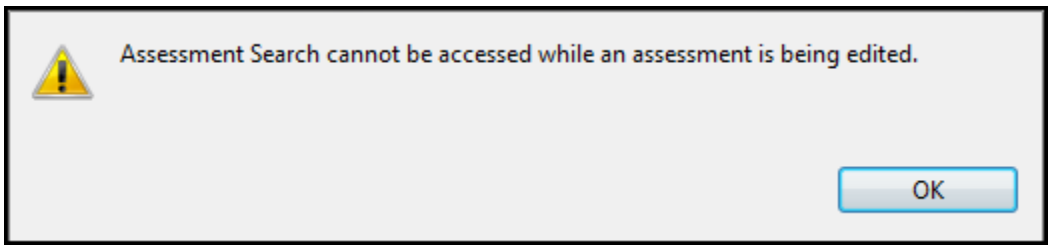
SCREEN TABS

Tabs for active screens (e.g. Home, Resident, Assessment Search, and Assessment) will display below the Toolbar at the top of the screen. The 'Assessment' tab will display the assessment type, resident name, and assessment date.



When the assessment screen is open, no other screens may be accessed.

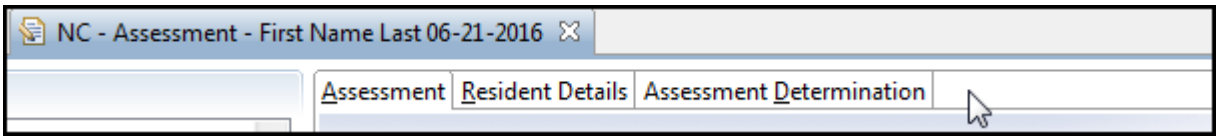
If a user attempts to view a subsequent screen tab, such as 'Assessment Search' while the 'Assessment' screen is active, the user will receive an error message stating that this function is not allowed, as shown in the example below. Click 'OK' to close the error message and return to the 'Assessment' screen.



ASSESSMENT SCREEN TABS

When an assessment is opened, three additional tabs will be displayed:

- Assessment
- Resident Details
- Assessment Determination



ASSESSMENT

The 'Assessment' tab displays the resident assessment; this is where all assessment data entry will be completed.

RESIDENT DETAILS

The 'Resident Details' tab displays resident demographic data in a view only, non-editable, format.

ASSESSMENT DETERMINATION

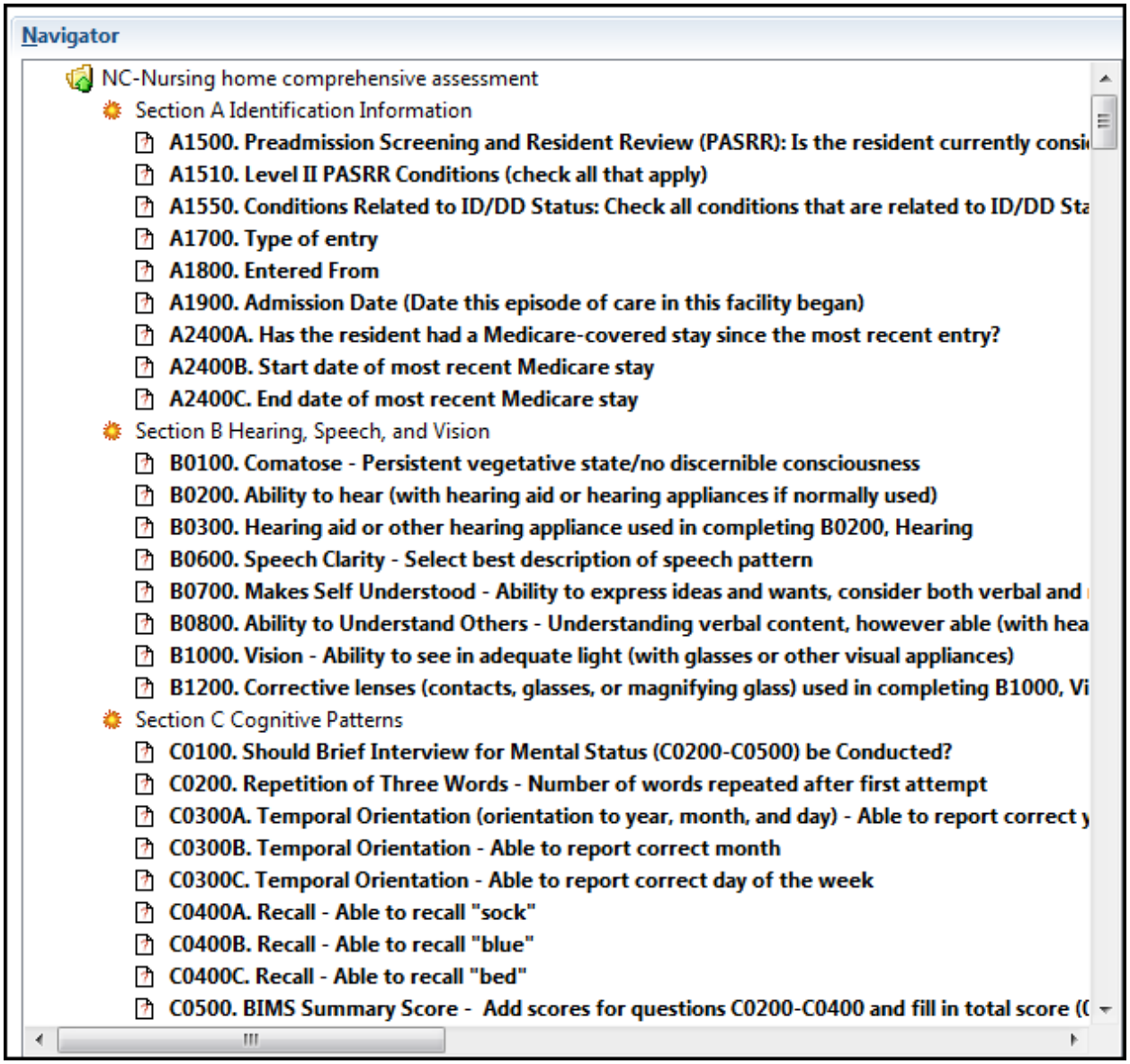
The 'Assessment Determination' tab displays data previously entered on the 'Add Assessment' wizard in a view-only, non-editable, format.

NAVIGATOR

The assessment 'Navigator' is located in the top left corner of the 'Assessment' screen, and will display all assessment items in a collapsible tree format. Unanswered questions will appear in **bold** type.

As questions are answered, they are removed from the tree. To change the display of the tree to continue showing answered questions, utilize the 'Show/Hide' icon in the Toolbar at the top of the screen.

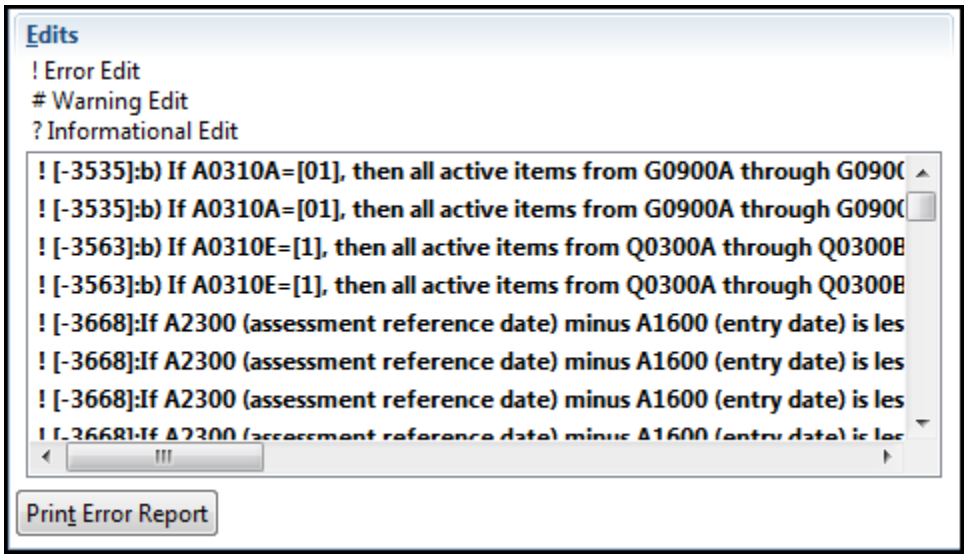
TIP: Clicking on an item in the tree will move the cursor to the selected field within the assessment.



EDITS

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

The assessment 'Edits' section is located in the bottom left corner of the 'Assessment' screen. This section displays applicable errors or warnings found within an assessment after selecting the 'Save and Validate' icon.



The following types of edits may occur in jRAVEN:

ERRORS (!)

This type of edit informs the user that information is missing or invalid. Data must be entered or corrected before the assessment may be completed.

WARNINGS (#)

This type of edit indicates there is data entered that should be verified as accurate, or serves as a reminder regarding how certain fields should be completed.

INFORMATIONAL (?)

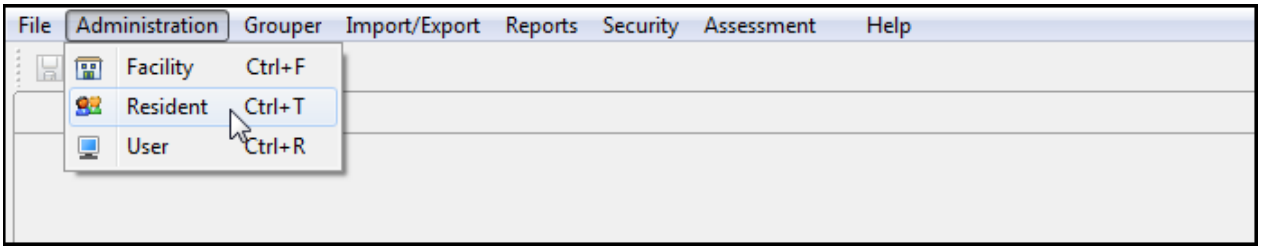
This type of edit gives the user general information about the assessment data entered.

TIP: Clicking on an edit message will move the cursor to the appropriate field within the assessment so it may be verified or corrected. An Assessment Error Report, which will display all edits shown on the 'Edits' section of the 'Assessment' screen may be printed. Utilize the 'Print Error Report' Print Error Report button at the bottom of the Edits Section to print the Assessment Error Report.

ADD AN ASSESSMENT

Complete the following steps to create an assessment:

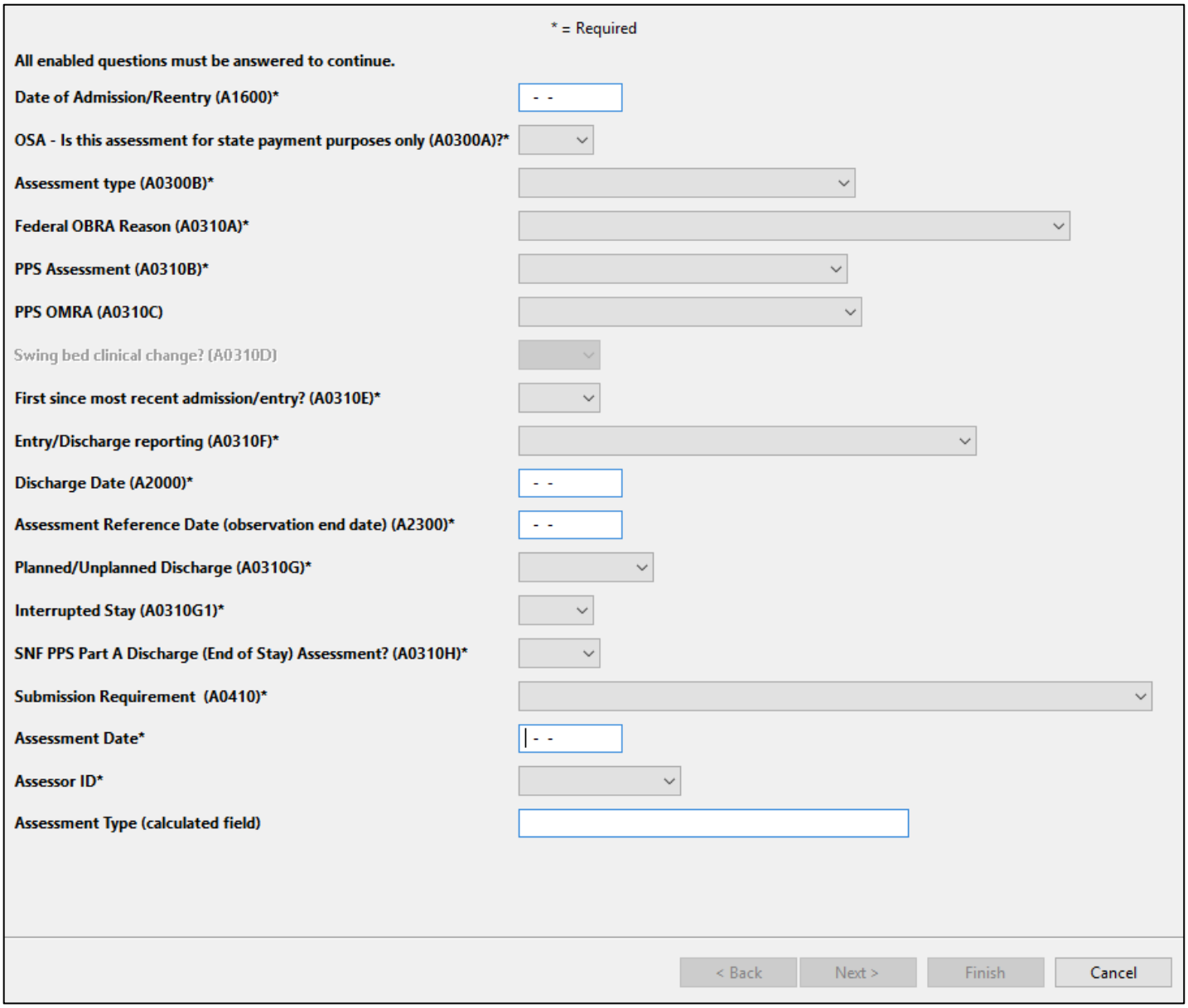
1. Select 'Resident' from the Administration drop-down on the Menu Bar:



Complete a Resident Search or add a new resident.

2. In the Resident Summary section, double click on the resident you wish to add an assessment for; OR highlight the resident row by clicking on the resident, and click the 'Add Assessment' [Add Assessment] button at the bottom of the Actions Section.

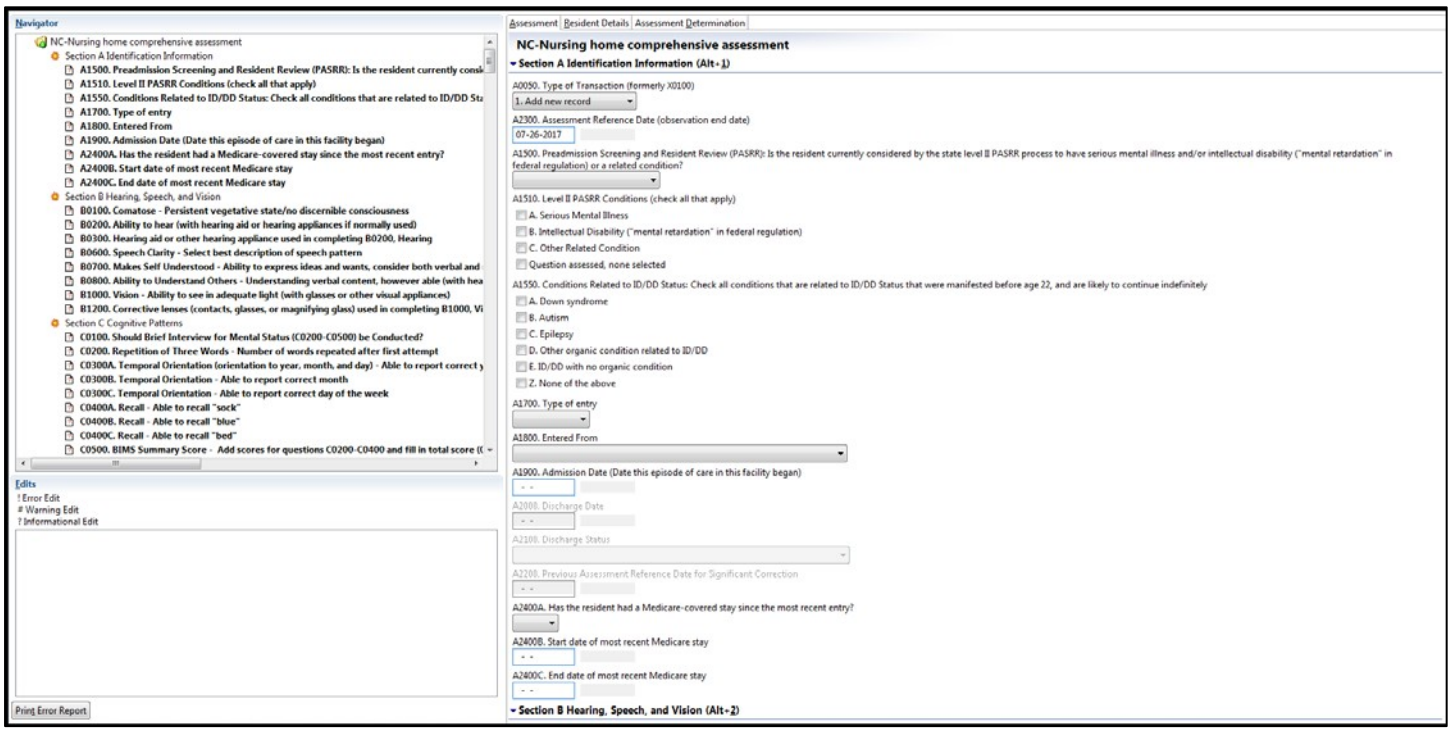
The 'Add Assessment' wizard displays.



3. Enter information into the fields as appropriate. Required fields display on the screen in bold type with an asterisk.

4. Click the 'Finish' [Finish] button to display the 'Assessment' screen and continue entering assessment data, OR click the 'Cancel' [Cancel] button to return to the 'Resident Information' screen.

Please Note: After clicking 'Finish' errors and/or warning messages, if applicable, will display in a pop-up window before opening the 'Assessment' screen. Below is an example of the 'Assessment' screen:



5. Enter data as appropriate on the 'Assessment' screen. Required fields will appear in bold type in the 'Navigator' section at the upper left. Clicking on an item in the 'Navigator' will move the cursor to the selected field within the assessment.

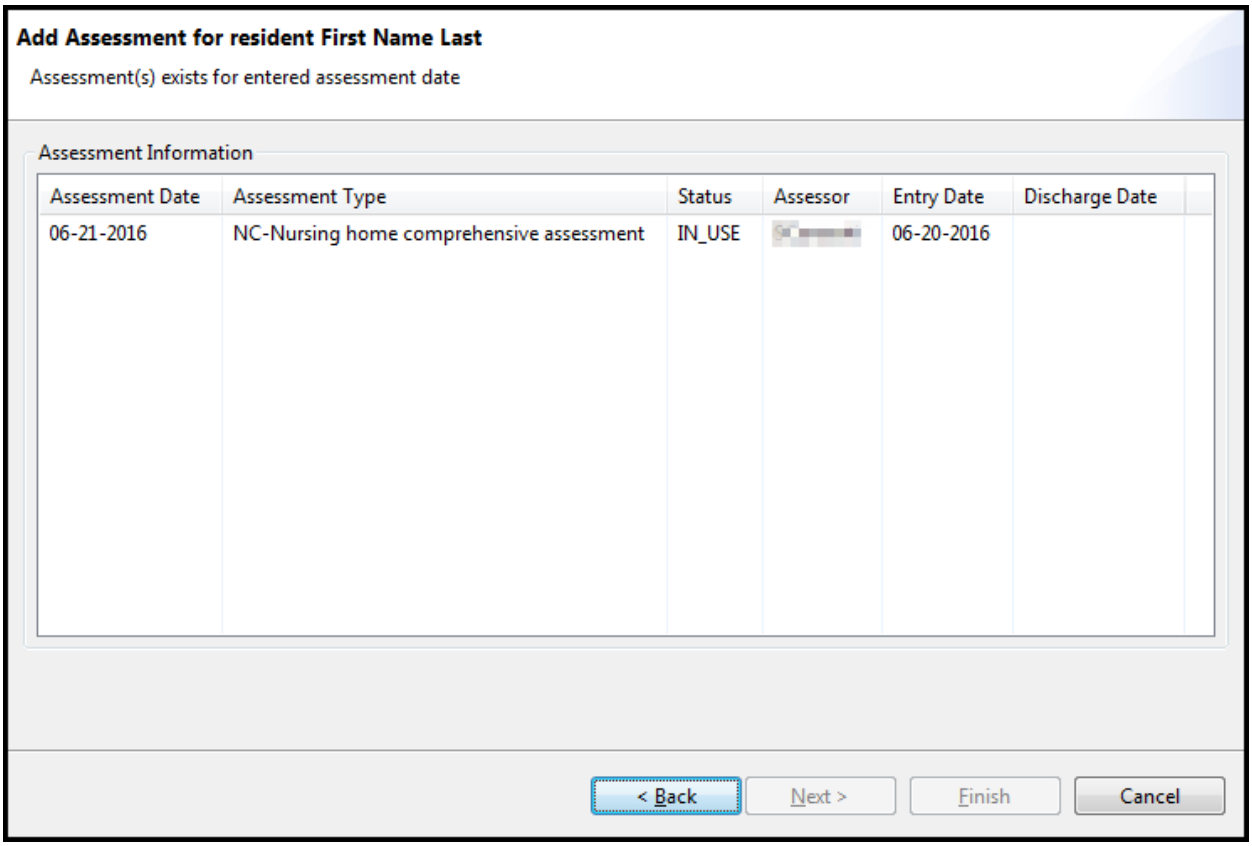
   Please Note: For optimization of the skip patterns and/or edits, it is recommended that data be entered in the order in which the questions appear on the screen.

6. To save progress as data is entered, click the 'Save' icon or utilize the short-cut, Ctrl+S.

7. When data entry is complete, click the 'Save and Validate' icon to validate the assessment for errors or warnings.

DUPLICATE ASSESSMENTS

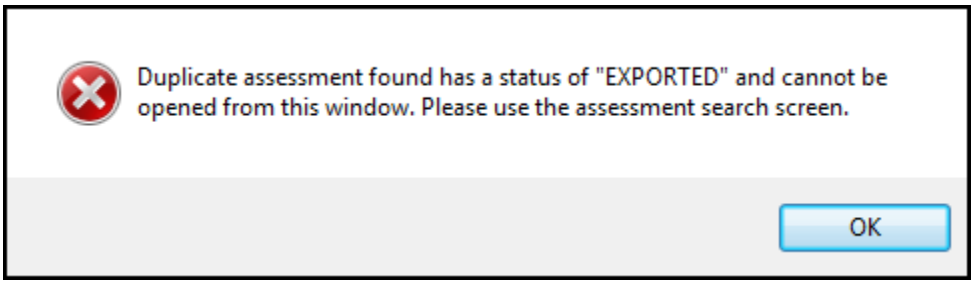
In the event that the information entered on the 'Add Assessment' wizard duplicates an existing record within the assessment database, the 'Next' button will enable on the 'Add Assessment' wizard, instead of the 'Finish' button. The following screen will display with a list of duplicate assessments.



Complete the following steps to proceed in the event of a duplicate assessment:

1. Click to highlight the assessment.
2. Select the 'Back' < Back button to return to the Add Assessment' wizard to make changes if needed. Select the 'Cancel' Cancel button to return to the Resident Information Screen OR select the 'Finish' Finish button to continue data entry of the existing assessment.

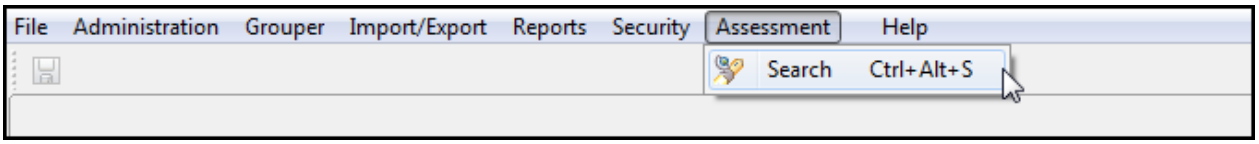
If the assessment found to be a duplicate is already in an Exported status, the following message will display: "Duplicate assessment found has a status of "EXPORTED" and cannot be opened from this window. Please use the assessment search screen." The user will need to navigate to the Assessment Search screen to modify or remove the assessment before proceeding.



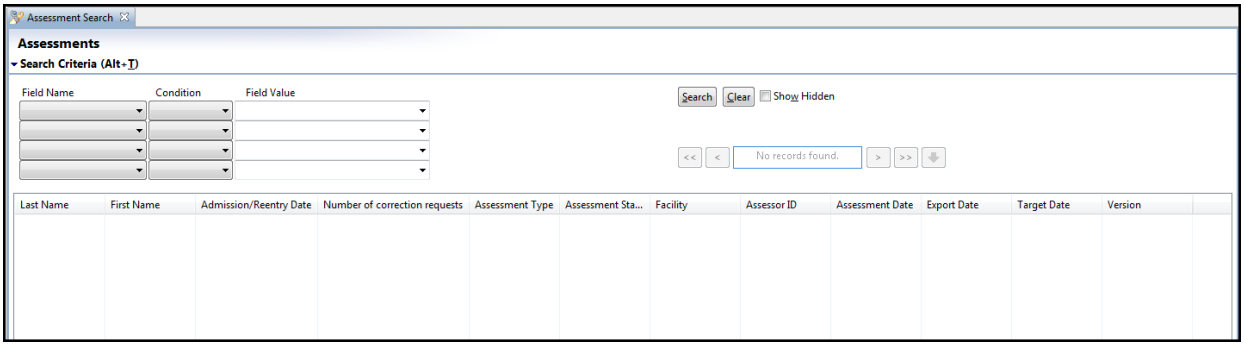
ASSESSMENT SEARCH

Complete the following steps to search for an assessment:

1. Select 'Search' from the Assessment drop-down on the Menu Bar.



The 'Assessment Search' screen displays.



2. To retrieve all existing assessment records, leave the Search Criteria blank and click the 'Search' Search button. To retrieve one or more assessment records based on Search Criteria:
   a) Select criteria from the Field Name and Condition lists.
   b) Enter a corresponding Field Value.
   c) Click the 'Search' Search button.
   d) Click the 'Clear' Clear button to remove search criteria.

Please Note: Selecting the box next to 'Show Hidden' will include records for residents marked 'Yes, Hide Record' on the 'Resident' screen. It is also recommended that, when conducting a search after updating Resident and/or Facility information, the user close any open tabs and begin with a new Assessment Search screen.

VIEW ONLY

Occasionally, it may be necessary to view previously-entered information where there is not a need to modify or edit the data. To view assessment data without editing or resetting the assessment status (e.g. Exported assessment), users may utilize the 'View Only' checkbox.

Complete the following steps to open an assessment in 'View Only' mode:

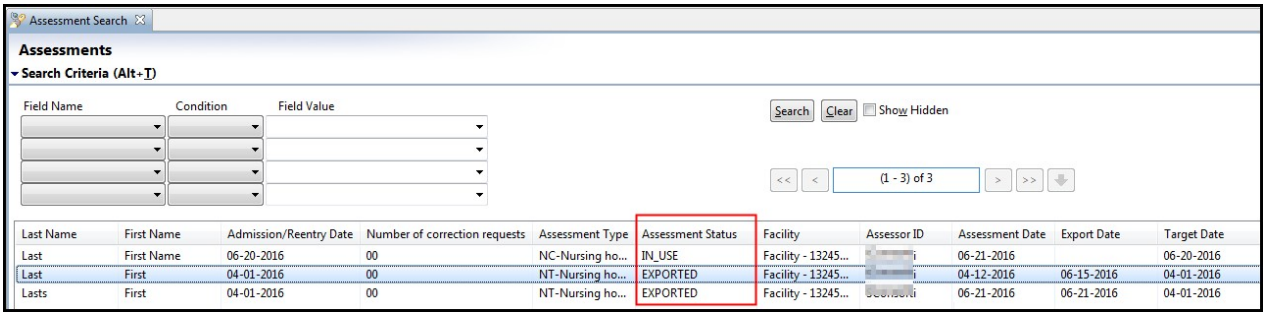
1. Complete an Assessment Search to locate the desired assessment.
2. Click to place a checkmark into the 'View Only' ☑ View Only checkbox at the bottom of the screen.
3. Highlight the desired assessment record and select the 'View Assessment' View Assessment button at the bottom of the 'Assessment Search' screen, or double click to open the assessment for viewing.
4. The 'Assessment' screen opens in 'View Only' mode.

Please Note: Assessments may not be modified in 'View Only' mode. To make changes to this assessment OR subsequent assessment records the 'View Only' checkbox MUST be unchecked.

MODIFY AN ASSESSMENT

When modifying an assessment, the user must first determine the assessment status. The assessment status may be viewed on the 'Assessment Search' screen as shown in the example below, or on the Tool Bar once an assessment record has been opened. The following assessment statuses may occur within jRAVEN:

- IN_USE
- DATA_ENTRY
- COMPLETE
- EXPORT_READY
- EXPORTED
- OUTDATED (assessment record greater than 24 months old)



IN_USE, DATA_ENTRY, COMPLETE, EXPORT_READY OR OUTDATED

Complete the following steps to modify an existing assessment with a status of IN_USE, DATA_ENTRY, COMPLETE, EXPORT_READY or OUTDATED:

1. Complete an Assessment Search to locate the desired assessment.
2. Highlight the assessment and select the 'Edit Assessment' Edit Assessment button at the bottom of the 'Assessment Search' screen, or double click to open the assessment for modification.

Please Note: When an OUTDATED assessment is opened, the following decision message will be displayed: "(Target Date) is greater than 24 months old. Would you like to continue and open this assessment?" Select 'Yes' to continue.

The 'Assessment' screen will display.

TIP: Unanswered questions will appear in **bold** type in the Navigator section at the upper left corner of the 'Assessment' screen. Clicking on an item in the Navigator tree will move the cursor to the selected field within the assessment.

3. Modify the assessment as appropriate.
4. Select the 'Save and Validate' icon on the toolbar to display any applicable warnings or errors found within an assessment.

EXPORTED

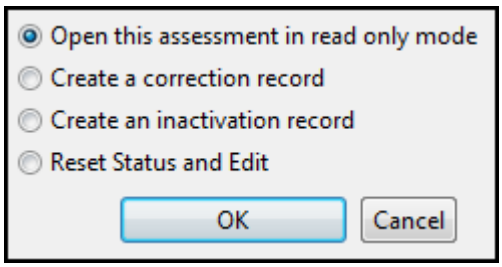
Only a user with System Administrator access may modify an assessment that has been exported.

Complete the following steps to modify an existing assessment with a status of EXPORTED:

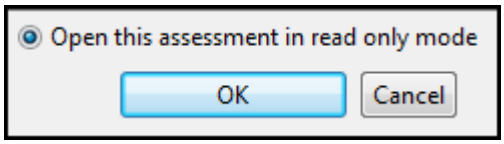
1. Complete an Assessment Search to locate the desired assessment.
2. Highlight the assessment and select the 'Edit Assessment' Edit Assessment button at the bottom of the 'Assessment Search' screen, or double-click to open the assessment for modification.

The 'Exported Assessment' pop-up window displays with the following options:

- **Open this assessment in read only mode** – Assessment opens and displays all previously selected answers in a view-only 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.
- **Create a correction record** – Assessment opens and displays all previously-selected answers. All fields may be modified with the exception of the responses given on the 'Add Assessment' wizard.
- **Create an inactivation record** – Inactivation assessment opens. Required fields are displayed within the Navigator section in bold type. Once saved, the assessment type will be changed to XX- Inactivation.
- **Reset Status and Edit** – Assessment opens and displays all previously selected answers in an editable format. All fields may be modified, with the exception of the responses given on the 'Add Assessment' wizard. The assessment status will be changed to IN_USE.



Please Note: Users who do not have System Administrator access will be shown an 'Exported Assessment' pop-up with only one option to "Open this assessment in read only mode." Selecting 'OK' will open the assessment for viewing only. Selecting 'Cancel' will return the user to the 'Assessment Search' screen.



3. Select one of the four options provided on the 'Exported Assessment' pop-up window.
4. Select 'OK' to continue.
5. Modify the assessment, if applicable, or enter the required fields shown in the navigator if creating an inactivation assessment.
6. Click the 'Save and Validate' icon on the toolbar.

MODIFY (A0410) SUBMISSION REQUIREMENT

The Submission Requirement (A0410) item provides three options to indicate a Facility or Unit's Certification or Licensure Designation. In coding this item, the facility must consider Medicare and/or Medicaid status, as well as the state's authority to collect MDS records. State regulations may require submission of MDS data to the QIES ASAP System, or directly to the state for residents residing in licensed-only beds.

Nursing homes and swing-bed facilities must be certain they are submitting MDS assessments to QIES ASAP System for those residents who are on a Medicare and/or Medicaid certified unit. For those residents who are in licensed-only beds, nursing homes must be certain they are submitting MDS assessments either to QIES ASAP System or directly to the state in accordance with state requirements.

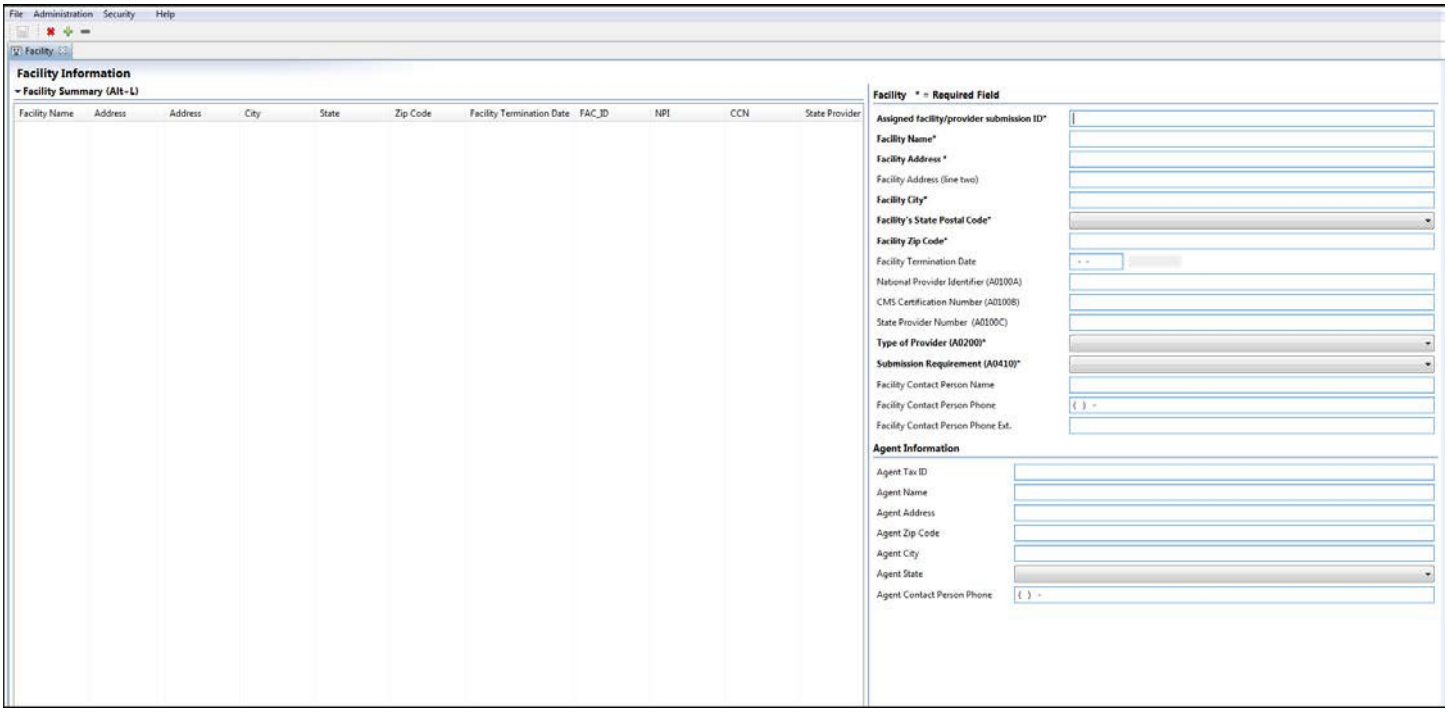
In order to successfully complete submissions to the appropriate state and/or national data repository, item A0410 must be encoded correctly. For additional information regarding how to encode item A0410 please consult Chapter 5 of the MDS 3.0 RAI Manual.

In the event there is a need to modify item A0410, this may be done via the 'Facility Information' screen OR on an individual assessment using the 'Assessment Search' screen.

To modify A0410 via the 'Facility Information' screen, complete the following steps:

1. Select 'Facility' from the Administration drop-down on the Menu Bar or 'Go To Facility' from the 'Home' screen.

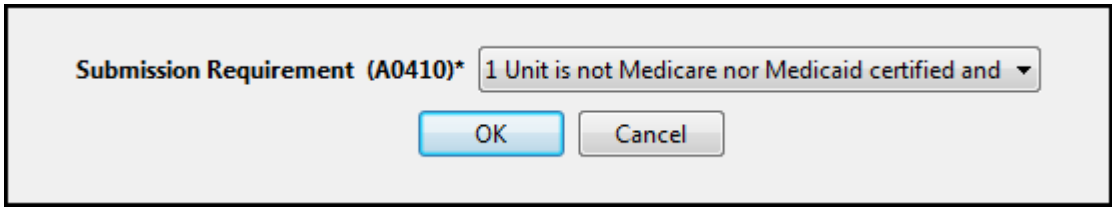
The 'Facility Information' screen displays.



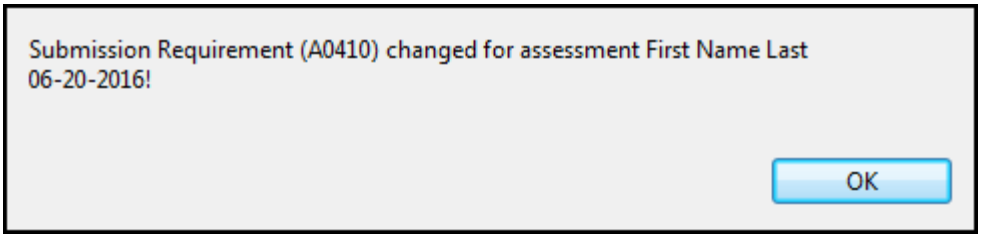
2. Select the appropriate submission requirement from the drop-down menu provided.
3. Select Save to update the facility information.

To modify A0410 via the 'Assessment Search' screen for an individual assessment, complete the following steps:

4. Complete an Assessment Search to locate the assessment to be modified.
5. Highlight the assessment and select the Modify SUB_REQ button in the lower right corner of the search window.
6. The 'Modify Submission Requirement (A0410)' window displays.



7. Select the appropriate SUB_REQ for the assessment from the provided drop-down.
8. Select the 'OK' OK button to change the value and proceed, OR select the Cancel Cancel button to close the window and leave the submission requirement unchanged.
9. Once a change has been successfully 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 assessment is highlighted, the Modify SUB_REQ button will be disabled (grayed out).

COPY AN INACTIVATED ASSESSMENT

Occasionally, it may be necessary to inactivate a record which subsequently needs to be modified for re-submission to the national data repository. For example, MDS policy instructs the provider to submit an inactivation record when the first name, last name, SSN, gender, and/or birthdate is to be corrected. A new record with the correct information is then submitted.

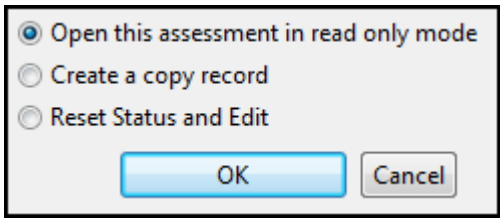
After updating the resident information (see Modify a Resident) a copy of the inactivated record can be made to avoid the need to re-enter all of the assessment data.

Complete the following steps to copy an inactivated assessment with a status of EXPORTED:

1. Complete an Assessment Search to locate the inactivated assessment. Note that the assessment type will be shown as XX-Inactivation on the 'Assessment Search' screen.
2. Highlight the assessment and select the 'Edit Assessment' Edit Assessment button at the bottom of the 'Assessment Search' screen or double click to open the assessment.

   The 'Exported Assessment' pop-up window displays with the following options:

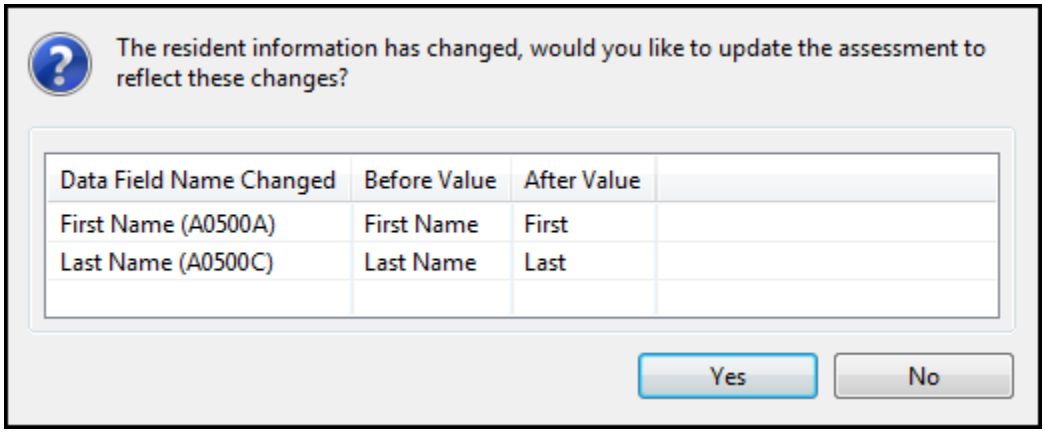
   - **Open this assessment in read only mode** – Inactivation assessment opens and displays all previously selected answers in a view only format. This selection checks the 'View Only' checkbox at the bottom of the 'Assessment Search' screen. All other assessments will be view only until this box is unchecked.
   - **Create a copy** – Assessment opens and displays all previously selected answers in an editable format. All fields may be modified with the exception of the responses given on the 'Add Assessment' wizard. Only one copy per inactivated assessment is allowed.
   - **Reset Status and Edit** – Inactivation Assessment opens and displays all applicable fields for editing. The Assessment Status will be changed to IN_USE.



3. Select one of the three options provided on the 'Exported Assessment' pop-up window.
4. Select 'OK' to continue.

Please Note: The following message will display prior to opening the assessment if resident information has been modified: "The resident information has changed, would you like to update the assessment to reflect these changes?"

- Select 'Yes' to update the assessment with the 'After Value'.
- Select 'No' to open the assessment without updating resident information.



The 'Assessment' screen opens.

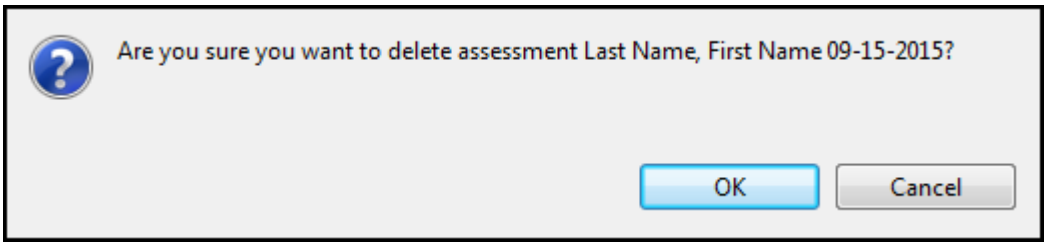
5. Modify the assessment data if applicable.
6. Click the 'Save and Validate' icon on the toolbar.
7. Close the assessment.

DELETE AN ASSESSMENT

Only a user with System Administrator access may delete an assessment. Assessments with a status of EXPORTED cannot be deleted; the status of these records must be reset to complete the deletion.

Complete the following steps to delete an assessment:

1. Complete an Assessment Search to locate the desired assessment.
2. Click once to highlight the assessment.
3. Click the 'Delete Assessment' Delete Assessment button at the bottom of the 'Assessment Search' screen to delete the selected assessment.
4. The 'Confirm Assessment Delete' pop-up window displays the following message: "Are you sure you want to delete assessment [resident last name, first name, admission/re-entry date (A1600)]?"

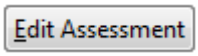


5. Select 'OK' to delete the assessment. Select 'Cancel' to close the pop-up window. The assessment will not be deleted.

If an assessment with a current status of EXPORTED needs to be deleted, the user should first verify that the assessment record has not been submitted to the national data repository.

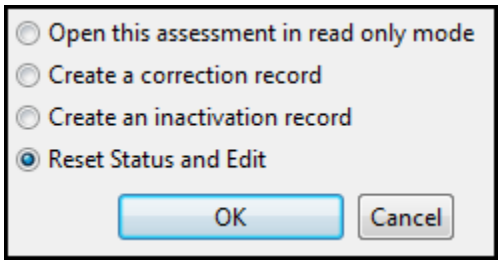
Complete the following steps to delete an assessment that has been previously exported:

6. Complete an Assessment Search to locate the desired assessment.

7. Highlight the assessment and select the 'Edit Assessment' 

button at the bottom of the 'Assessment Search' screen or double-click to open the assessment.

   The 'Exported Assessment' pop-up window displays with the following options:
   - Open this assessment in read only mode
   - Create a correction record
   - Create an inactivation record
   - Reset Status and Edit



8. Select the 'Reset Status and Edit' radio button.
9. Select 'OK'.
   The 'Assessment' screen will open, setting the assessment status to IN_USE.
10. Close the assessment.

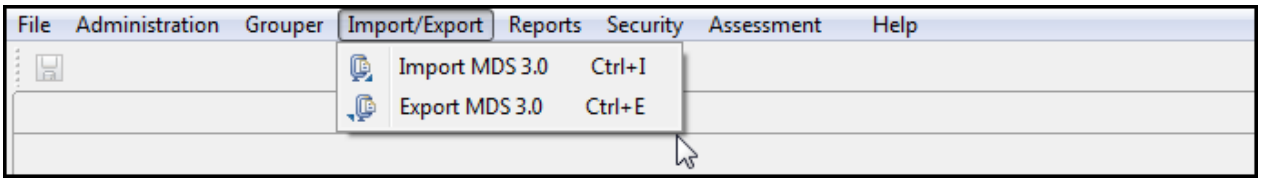
Follow the instructions to Delete an Assessment to complete the removal of the assessment record.

EXPORT

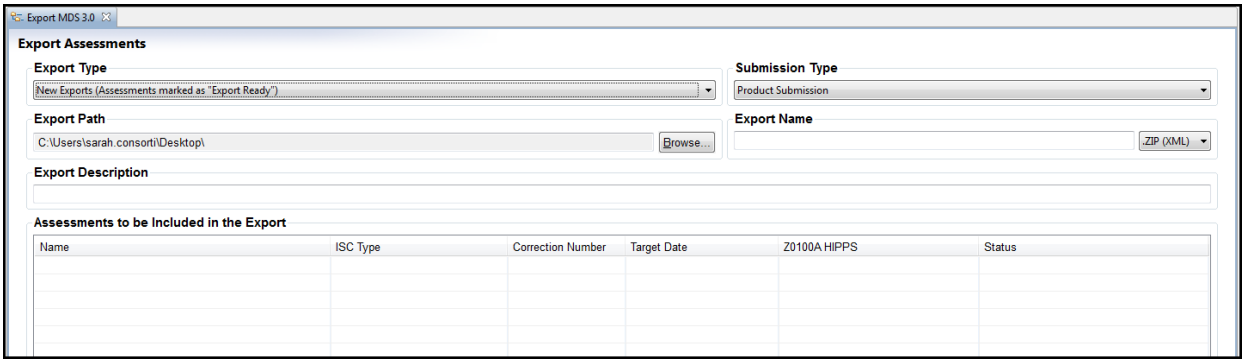
The 'Export Assessments' screen allows the user to export records for subsequent submission to the appropriate national data repository.

Complete the following steps to export an assessment:

1. Select 'Export MDS 3.0' from the Import/Export drop-down on the Menu Bar.



   The 'Export Assessments' screen displays.



The export process will depend upon which Export Type is chosen. Select one of the following Export Types from the drop-down at the upper left corner of the 'Export Assessments' screen:

- New Export (Assessments marked as "Export Ready")
- Previous Export (Assessments marked as "Export Ready" or "Exported").

The process for each Export Type is defined below.

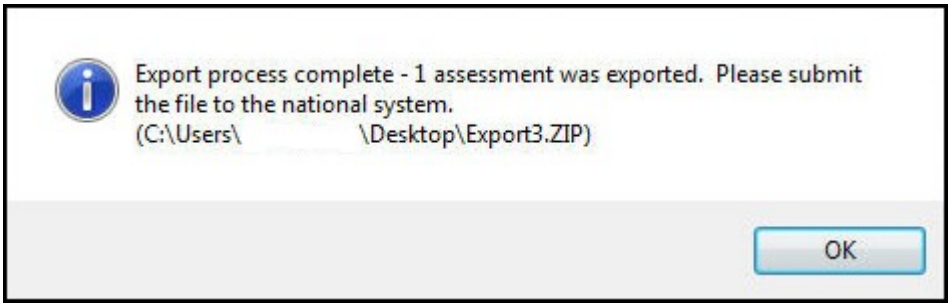
NEW EXPORT

ASSESSMENTS MARKED AS "EXPORT READY"

Complete the following steps when selecting New Export:

1. Click the 'Browse' [Browse...] button to select the Export Path. This is the location where the exported files will be saved.
2. Enter a unique file name into the field labeled Export Name. The Export Name will serve as a reference to the user when submitting the file to the appropriate national data repository. An example of what a user may choose to enter here would be the date the export file is created.
3. Enter the Export Description. This is an optional field which may be used to document additional details regarding the export file.
4. Select the assessments to be included in the export file by placing a checkmark into the boxes next to the desired assessment records. A minimum of one selection is required.
   - The 'Select All' [Select All] button will select all assessments displayed in the list to be included in the export file.
   - The 'Clear Selection' [Clear Selection] button will unselect all assessments previously selected.
5. If desired, select the 'Print Assessment List' [Print Assessment List] button to print a list of all assessments selected to be included in the export file. Please note: This report does not have a preview option and will be sent directly to the printer of the user's choice.
6. If desired, select the 'Error Check' [Error Check] button to validate all assessments selected for export. Warnings and/or Error results will display in a new screen.
7. Select the 'Save to File' [Save to File] button to save the error report.
8. Select the 'Close' [x] icon in the upper right corner to close the error report.
9. Select the 'Export' [Export] button to complete the export process.

   The 'Export Complete' pop-up window displays notifying the user that the export process is complete. The number of assessments which have been exported, as well as the location of the exported files displays within this pop-up window.

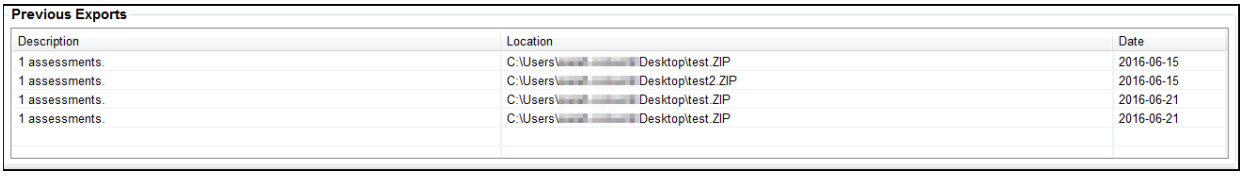


PREVIOUS EXPORT

ASSESSMENTS MARKED AS "EXPORT READY OR "EXPORTED"

Complete the following steps when selecting Previous Export:

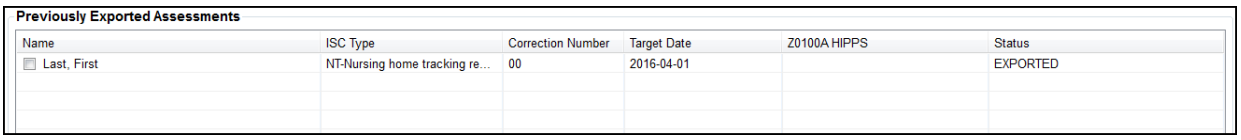
1. Begin by highlighting a previously-exported file from the list in the Previous Exports section located in the center of the 'Export Assessments' screen.



Previous Exports

Description	Location	Date
1 assessments.	C:\Users\ Desktop\test.ZIP	2016-06-15
1 assessments.	C:\Users\ Desktop\test2.ZIP	2016-06-15
1 assessments.	C:\Users\ Desktop\test.ZIP	2016-06-21
1 assessments.	C:\Users\ Desktop\test.ZIP	2016-06-21

A list of assessments included in the previous exports will be displayed in the section titled Previously Exported Assessments located at the bottom of the 'Export Assessments' screen.



Previously Exported Assessments

Name	ISC Type	Correction Number	Target Date	Z0100A HIPPS	Status
Last, First	NT-Nursing home tracking re...	00	2016-04-01		EXPORTED

2. Select the assessments to be included in the export file by placing a checkmark into the boxes next to the desired assessment records. While all assessments included in the previous export will be displayed, ONLY assessments with a status of "Export Ready" or "Exported" may be selected for inclusion in a new export file. A minimum of one selection is required.
   - The 'Select All' [Select All] button will select all assessments displayed in the list to be included in the export file.
   - The 'Clear Selection' [Clear Selection] button will unselect all assessments previously selected.
3. Click the 'Browse' [Browse...] button to select the Export Path. This is the location where the exported files will be saved.
4. Enter a unique file name into the field labeled Export Name. The Export Name will serve as a reference to the user when submitting the file to the appropriate national data repository. An example of what a user may choose to enter here would be the date the export file is created.

Please Note: By default, the original Export Path and Export Name will be displayed. It is recommended to use the same Export Path for each export file; however, the Export Name should be unique for each export file created. Failure to create a new Export Name may result in the following decision message: "The file you are attempting to export already exists, overwrite file?"

- Selecting 'Yes' will replace the original export file saved.
- Selecting 'No' will return the user to the 'Export Assessments' screen to select a new Export Name.

5. Enter the Export Description. This is an optional field which may be used to document additional details regarding the export file.
6. If desired, select the 'Print Assessment List' [Print Assessment List] button to print a list of all assessments selected to be included in the export file. Please note: This report does not have a preview option and will be sent directly to the printer of the user's choice.
7. If desired, select the 'Error Check' [Error Check] button to validate all assessments selected for export. Warnings and/or Error results will display in a new screen.
   - Select the 'Save to File' [Save to File] button to save the error report.
   - Select the 'Close' [x] icon in the upper right corner to close the error report.

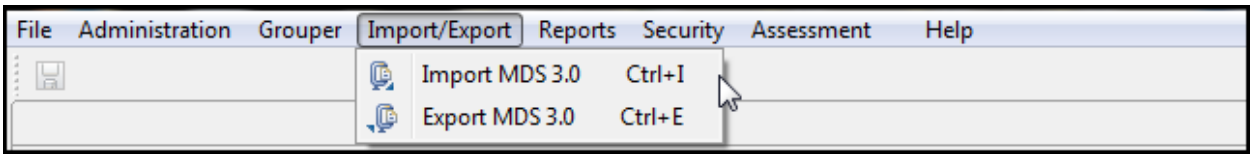
8. Select the 'Export' Export button to complete the export process.

The 'Export Complete' pop-up window displays, notifying the user that the export process is complete. The number of assessments which have been exported, and the location of the exported files display within this pop-up window.

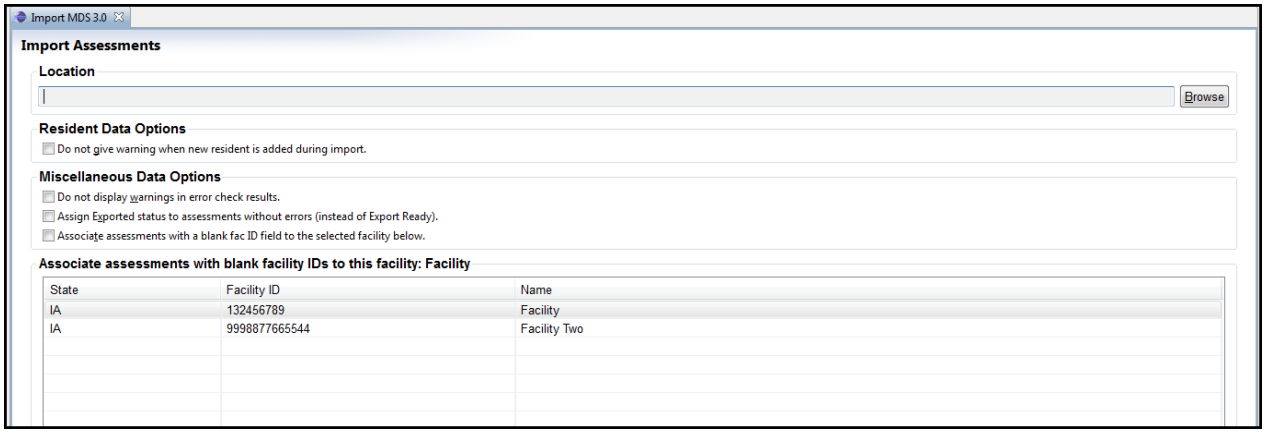
IMPORT

The 'Import Assessments' screen allows users to import Resident and Assessment information. Complete the following steps to import an assessment:

1. Select 'Import MDS 3.0' from the Import/Export drop-down on the toolbar.



The 'Import Assessments' screen displays:



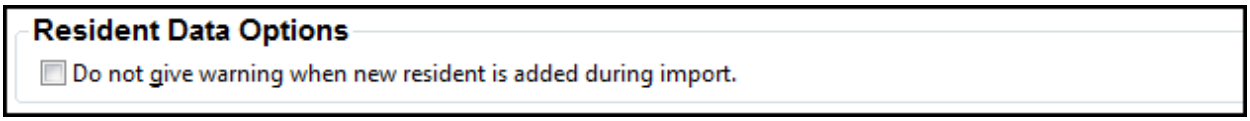
2. Click the 'Browse' Browse... button to navigate to the location of the assessment files to be imported.

   Please Note: There may be an increased wait time when importing a large number of assessment records due to database encryption.

PREFERENCES

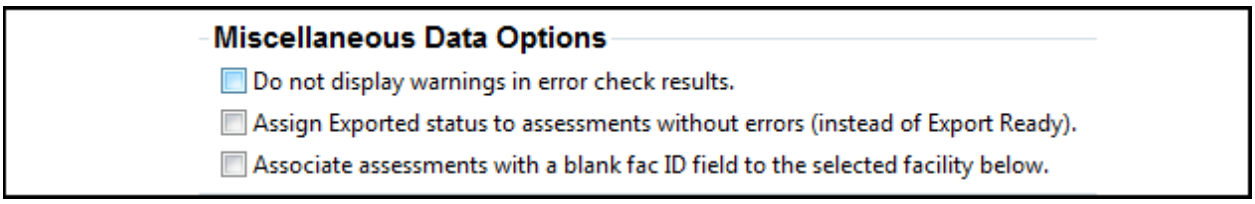
RESIDENT DATA OPTIONS CHECKBOX

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

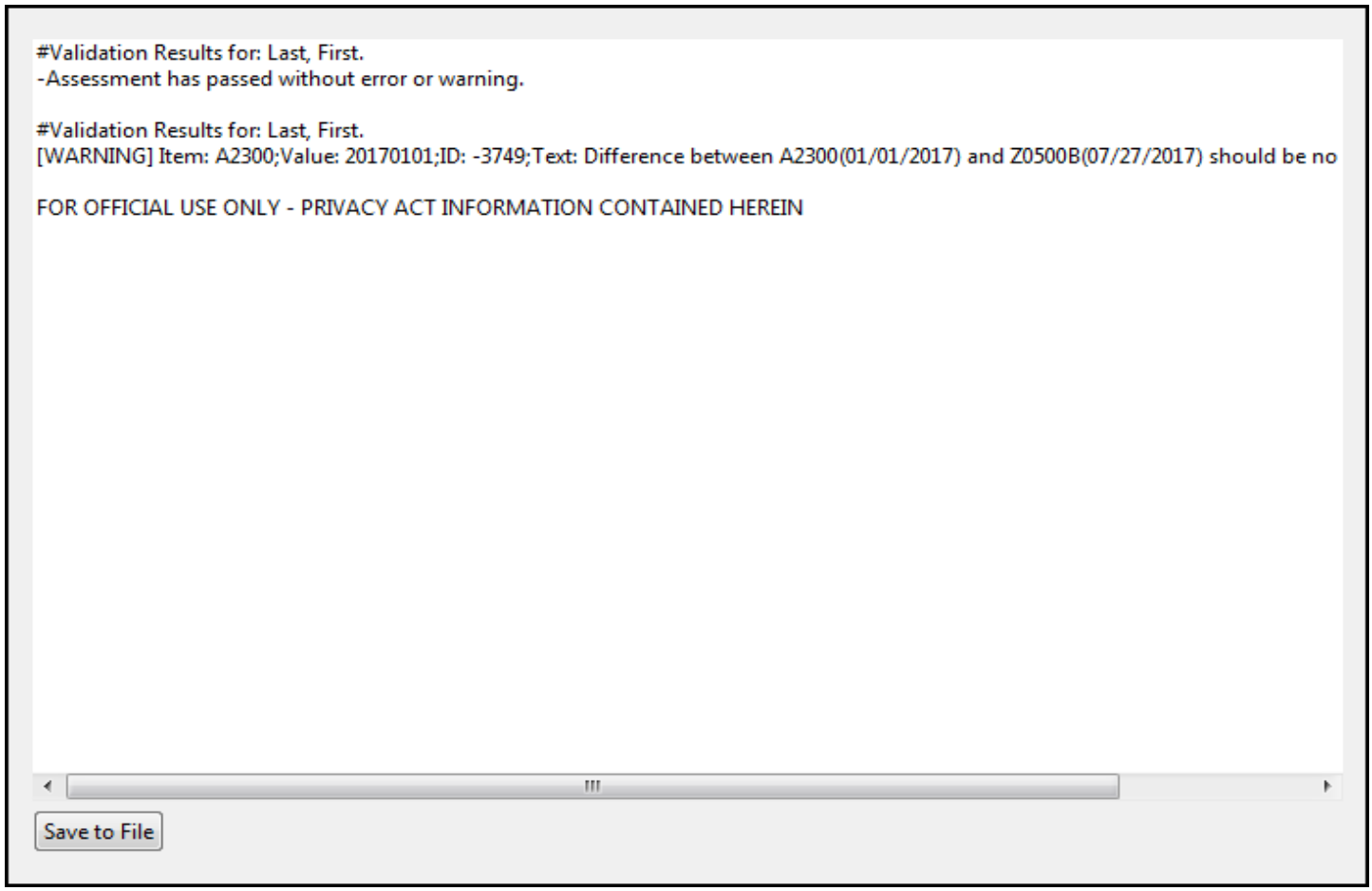


MISCELLANEOUS DATA OPTIONS CHECKBOXES

- "Do not display warnings in error check results." Selecting this checkbox removes warning messages from the error check results report that displays after importing data. ONLY fatal errors are included in the report. Please note assessments which contain fatal errors in accordance with the MDS 3.0 Data Specifications will NOT be imported into jRAVEN.
- "Assign Exported status to assessments without errors (instead of Export Ready)." Selecting this checkbox sets the status of imported assessments to 'Exported'. It is recommended to select this option if all records have been previously accepted by the ASAP System.
- "Associate assessments with a blank facility ID field to the selected facility below." Selecting this checkbox links import records which are missing a facility ID to the selected facility.



1. Set the desired preferences. You may select preferences individually or click the 'Select All Options' Select All Options button to check or uncheck all checkboxes.
2. Optional: Select the 'Error Check File' Error Check File button to validate the assessments contained in the import file before completing the import process. A Status Report will display error results in a new window. The following image is an example of the Error Check File Status Report:
   - Select the 'Save to File' Save to File button to save the error report in a .txt file format.
   - Click the 'Close' icon in the top right corner to close the Status Report.



3. Click the 'Import'

button to import the selected assessment file into jRAVEN.

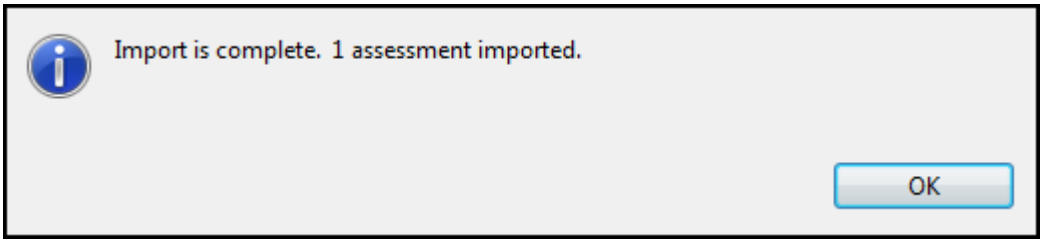
   If the import file chosen contains assessment records for residents who have not previously been entered into jRAVEN, a 'New Resident' message will be displayed:

   "A new resident is being added to (Facility – FAC ID). Continue with the import of (Resident Name - SSN)?"

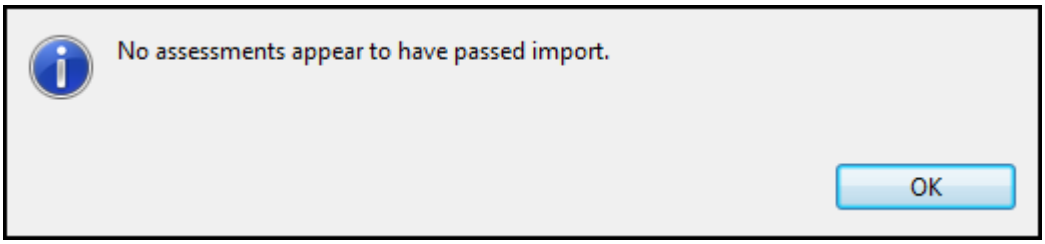
   - Click 'Yes' to continue.
   - Click 'No' or 'Cancel' to stop the import process for that Resident.

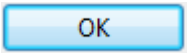
   This message will NOT be shown if the Resident Data Options checkbox has been selected.

Import timing will vary based on the number of records included in the selected file. Once complete, the 'Import Complete' confirmation message will display, along with an Import Status Report for all assessments included in the import file.



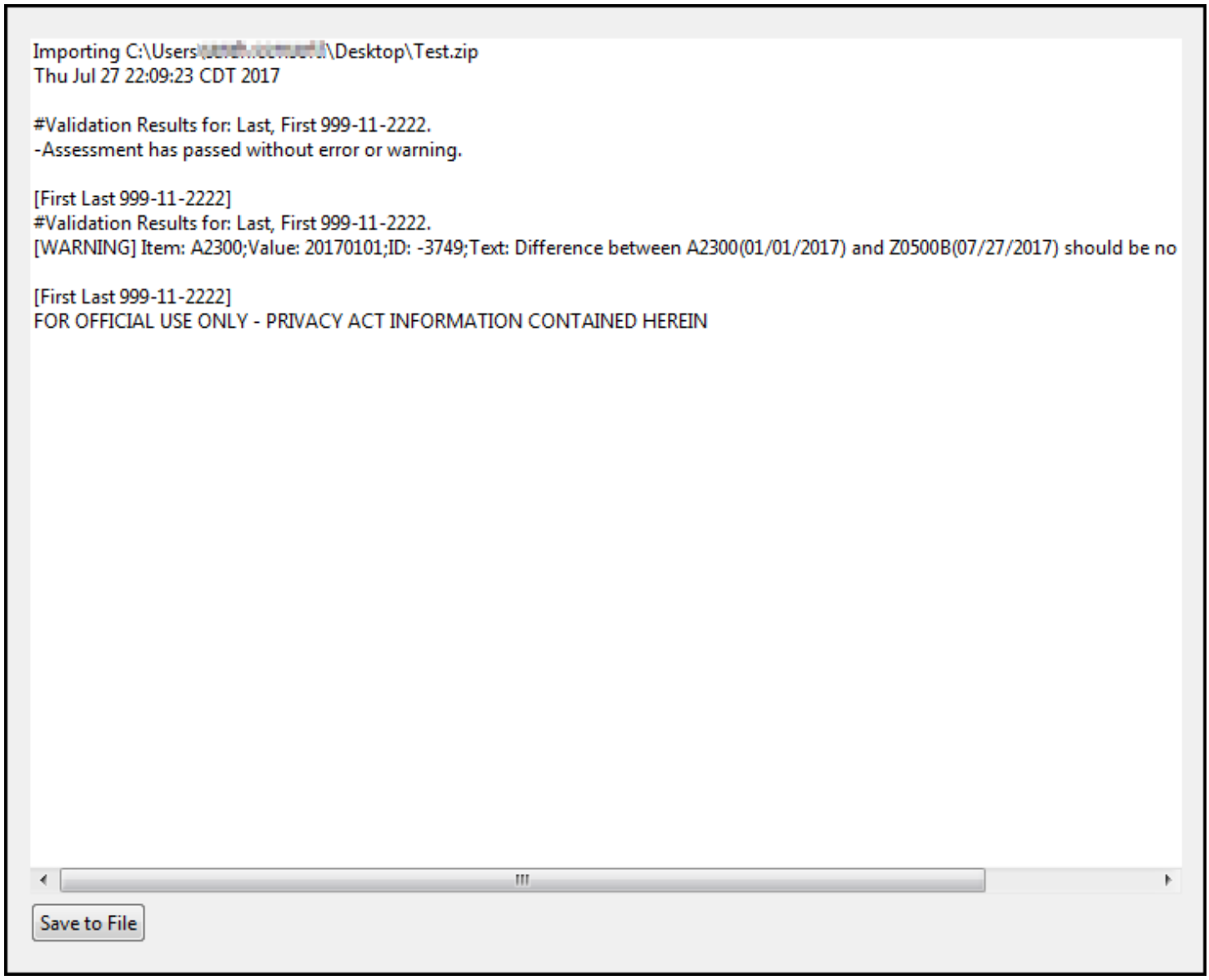
If none of the selected files are successfully imported, the 'Import Failed' message displays along with an Import Status Report.



4. Click the 'OK' 

button on the 'Import Complete' pop-up window to view the Import Status Report.

   ATTENTION!
   Only ONE import status report may be open at a time; additional functions cannot be selected until the report is either saved or closed. This is the ONLY opportunity the user will have to view OR save the Import Status Report. It is strongly recommended to save or print this report for future reference as needed. Below is an example of the Import Status Report:



1. Click the 'Save to File' Save to File button on the bottom of the Import Status Report to save a copy.
2. Click 'Close' in the top right corner to close the Status Report.

jRAVEN REPORTS

jRAVEN reports allow users to preview and print assessment information, as well as detail and summary information for residents, facilities, and user accounts.

In addition to the previously mentioned status reports, the following reports are available within the jRAVEN application:

- Print Assessment Report
- Print Assessment Error Report
- Event Tracking
- Assessment Data Entry – By Status

PRINT ASSESSMENT REPORT

The Print Assessment Report provides a listing of all data which has been entered into the assessment record, and may be generated at any time in the data entry process once the assessment has been created.

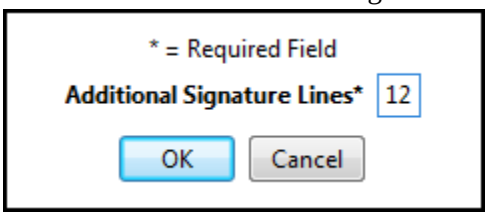
Complete the following steps to obtain the Print Assessment Report.

1. After selecting the assessment on the Assessment Search Screen, use one of the following methods:

   - Select the Print Assessment Report icon on the Toolbar.
   - Utilize the short-cut Ctrl+A.
   - Select 'Print Assessment Report' from the File drop-down on the Menu Bar.

   The Print Assessment Report criteria selection window is displayed. This criteria selection window may be used to designate the number of signature lines shown on the printed report.

   The default number of signature lines will be 12. The Additional Signature Lines item is a *required field.

2. Select the 'OK' button to generate the report. Selecting 'Cancel' will close the Print Assessment Report criteria selection window. The Print Assessment Report will not be generated.

3. To print the report, click the 'Print' icon on the Report Viewer screen.

4. To save the report, click the 'Save' icon on the Report Viewer screen.

5. To export the report, click the arrow next to the 'Save' icon. The following export type values display:
   - 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

6. Select an export type.

7. Select the location in which you wish to save the report. Below is an example of a Print Assessment Report in PDF format:

jRAVEN MDS 3.0 - Resident Assessment Validation and Entry System

Facility: Lake Worth Nursing Home - TX5038 {TX}
Resident Name: Last, First
Assessment Date: 10/01/2019
Date: 08/07/2019
Requested by: SysAdmin

Last Entry Date: 10/01/2019
Data Entry Time: 00:12:21
Data Entry User: SysAdmin

Header Records

Assessment Type: NC-Nursing home comprehensive assessment
Admission/Reentry Date: 10/01/2019
Reference Date: 10/01/2019
Correction Number: 00

Z0100A-Medicare Part A HIPPS code	IAUF6
Z0100B-RUG version code - Medicare Part A Billing	1.0000
Z0100C-Is this a Medicare Short Stay assessment?	
Z0150A-Medicare non-therapy Part A HIPPS code	
Z0150B-RUG version code - Medicare Non-Therapy Part A Billing	
Z0200A-RUG Case Mix group - State Medicaid Billing	
Z0200B-RUG version code - State Medicaid Billing	
Z0250A-RUG Case Mix group - Alternate State Medicaid Billing (Calculated field)	
Z0250B- RUG version code -Alternate State Medicaid Billing	
Z0300A-RUG Case Mix group - Insurance Billing	
Z0300B-RUG Case Mix group - Insurance Billing (Calculated field)	

Facility

FAC_ID FAC_ID:	TX5038
STATE_CD State:	TX Texas
A0100B CCN:	455507
A0200 Type of Provider:	1 Nursing home(SNF/NF)
A0410 Submission Requirement:	3 Unit is Medicare and/or Medicaid certified.

Resident

A0500A First Name:	First
A0500C Last Name:	Last
A0500D Suffix:	NC
A0600A SSN:	999-11-2222
A0800 Gender:	Female
A0900 Birthdate:	08-06-1970
A1000 Race:	A. American Indian or Alaska Native
A1100A Interpreter needed?:	No
A1200 Marital Status:	1. Never married

Type of Assessment

A1600 Entry Date:	10-01-2019
A0300A Optional State Assessment:	0. No
A0310A Reason for Assessment:	05 - Significant correction to prior comprehensive assessment

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ASSESSMENT ERROR REPORT

The Assessment Error Report provides a printable listing of all edits received once an assessment has been saved and validated against the MDS 3.0 Data Submission Specifications. Complete the following steps to obtain the Assessment Error Report:

1. After selecting 'Save and Validate' , use one of the following methods:
   - Select the 'Print Error Report' Print Error Report button located at the bottom of the 'Edits' section.
   - Select the 'Print Assessment Error Report' icon on the Toolbar.
   - Utilize the short-cut Ctrl+P.
   - Select 'Print Assessment Error Report' from the File drop-down on the Menu Bar. The Assessment Error Report is displayed.
2. To print the report, click the 'Print' icon on the Report Viewer screen.
3. To save the report, click the 'Save' icon on the Report Viewer screen.
4. To export the report, click the arrow next to the 'Save' icon.

   The following export type values display:
   - 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
5. Select an export type.
6. Select the location in which you wish to save the report. Below is an example of an Assessment Error Report in PDF format:

Assessment Error Report

Assessment Type: NC-Nursing home comprehensive assessment
Assessment Date: 07/27/2017
Last Name: Last Name
Entry Date: 07/01/2014

Question	Severity	Error Number	Error Message
A1600	Warning	110378	Date of admission/reentry (A1600) is more than 14 days before current date.
I8000A	Error	-3591	The ICD-9 code must be eight characters in length.
V0200C2	Warning	-3810	Difference between V0200C2(07/01/2014) and TODAY(07/27/2017) should be no more than 14 days (1122)

[-] = Not Assessed, [^] = Skipped

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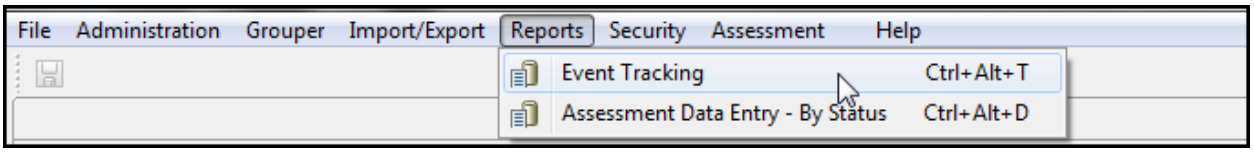
EVENT TRACKING

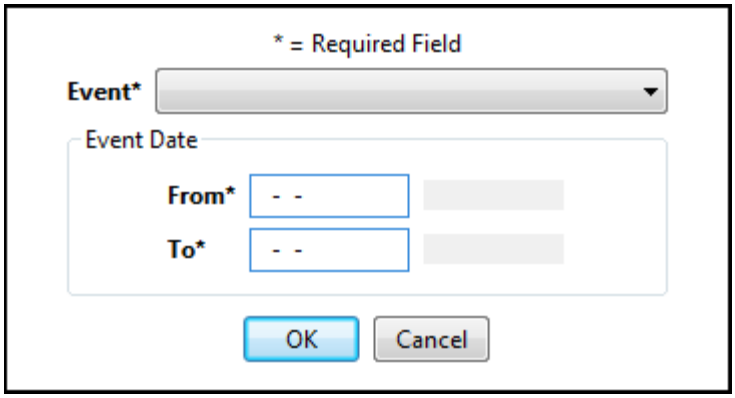
The Event Tracking report may be used to monitor additions, deletions, and/or modifications which are made to the Facility, User, Resident, or Assessment screens.

Complete the following steps to run the Event Tracking report:

1. Select 'Event Tracking' from the Reports drop-down on the Menu Bar.



The 'Event Tracking' criteria selection window displays:



2. Complete the required fields. Required fields display on the screen in bold type with an asterisk.
3. Select the 'OK' OK button to generate the report. Selecting 'Cancel' Cancel will close the 'Event Tracking' criteria selection window.
4. To print the report, click the 'Print' icon on the Report Viewer screen.
5. To save the report, click the 'Save' icon on the Report Viewer screen.
6. To export the report, click the arrow next to the 'Save' icon.

   The following export type values display:

   - 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
7. Select an export type.
8. Select the location in which you wish to save the report. Below are examples of two Event Tracking Reports in PDF format: Resident Event Tracking and Assessment Event Tracking:

jRAVEN - Resident Assessment Validation and Entry System

Resident Event Tracking

07-01-2017 thru 07-27-2017

Requested by: SysAdmin

Event: Resident

Event Type	User ID	Event Date	Last Name	First Name	SSN	Birth Date	Hide Resident
Add	SysAdmin	07/26/2017 11:54 AM	Last Name	First Name		10/10/1910	0
Add	SysAdmin	07/27/2017 10:44 AM	Last	First	999-11-2222	01/01/1910	0
Add	SysAdmin	07/27/2017 10:44 AM	Name	Name	999-22-3333	02/02/1910	0
Modify	SysAdmin	07/27/2017 10:45 AM	Last	First	999-11-2222	01/01/1910	0
Delete	SysAdmin	07/27/2017 10:46 AM	Name	Name	999-22-3333	02/02/1910	0

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jRAVEN – Resident Assessment Validation and Entry System

Assessment Event Tracking

07-01-2017 thru 07-27-2017

Requested by: SysAdmin

Event: Assessment Data

Event Type	User ID	Event Date	Last Name	First Name	SSN	Assessment Type	Assessment Date
Add	SysAdmin	07/26/2017 11:55 AM	Last Name	First Name		NC-Nursing home comprehensive assessment	07/26/2017
Add	SysAdmin	07/27/2017 10:46 AM	Last	First	999-11-2222	NQ-Nursing home quarterly assessment	07/27/2017
Modify	SysAdmin	07/27/2017 10:47 AM	Last	First	999-11-2222	NQ-Nursing home quarterly assessment	07/27/2017
Add	SysAdmin	07/27/2017 10:49 AM	Last Name	First Name		NC-Nursing home comprehensive assessment	07/27/2017
Modify	SysAdmin	07/27/2017 10:50 AM	Last Name	First Name		NC-Nursing home comprehensive assessment	07/27/2017
Delete	SysAdmin	07/27/2017 10:50 AM	Last Name	First Name		NC-Nursing home comprehensive assessment	07/27/2017

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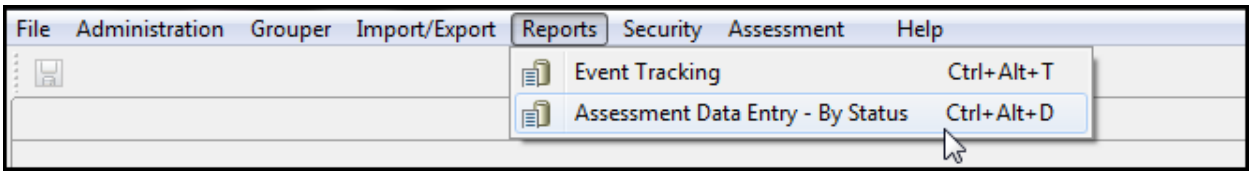
ASSESSMENT DATA ENTRY – BY STATUS

The Assessment Data Entry – By Status report provides a listing of all assessment records for the chosen status. The following statuses are available in jRAVEN:

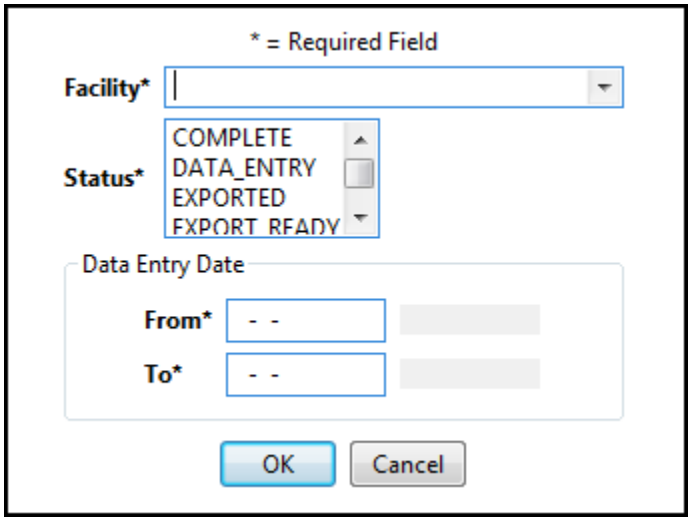
- In Use
- Data Entry
- Complete
- Export Ready
- Exported
- Outdated

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 Menu Bar.



The 'Assessment Data Entry – By Status' criteria selection window displays:



2. Complete the required fields. Required fields display on the screen in bold type with an asterisk. To select two or more statuses, hold the Ctrl OR the Shift button on your keyboard while you select or scroll through the list.

3. Select the 'OK' OK button to generate the report. Selecting 'Cancel' Cancel will close the 'Assessment Data Entry – By Status' criteria selection window.

   The Report Viewer screen opens, displaying the generated report.

4. To print the report, click the 'Print' icon on the Report Viewer screen.

5. To save the report, click the 'Save' icon on the Report Viewer screen.

6. To export the report, click the arrow next to the 'Save' icon. The following export type values display:
   - 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

7. Select an export type.
8. Select the location in which you wish to save the report. Below are two examples of Assessment Data Entry – By Status Reports in PDF format, In Use and Exported.

jRAVEN – Resident Assessment Validation and Entry System

Assessment Status Tracking

Facility Name - 123456789 {IA}

07-01-2017 thru 07-27-2017

Status: IN_USE

Requested by: SysAdmin

Resident Name	Social Security	Gender	Birth Date	Assessment Type	Assessment Date	User
Last, First	999-11-2222	Female	01/01/1910	NQ-Nursing home quarterly assessment	07/27/2017	SysAdmin
Last Name, First Name	--	Female	10/10/1910	NC-Nursing home comprehensive assessment	07/26/2017	SysAdmin

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jRAVEN – Resident Assessment Validation and Entry System

Assessment Status Tracking

Facility Name - 123456789 {IA}

07-01-2017 thru 07-27-2017

Status: EXPORTED

Requested by: SysAdmin

Resident Name	Social Security	Gender	Birth Date	Assessment Type	Assessment Date	User
Last, First	999-11-2222	Female	01/01/1910	NQ-Nursing home quarterly assessment	07/27/2017	SysAdmin

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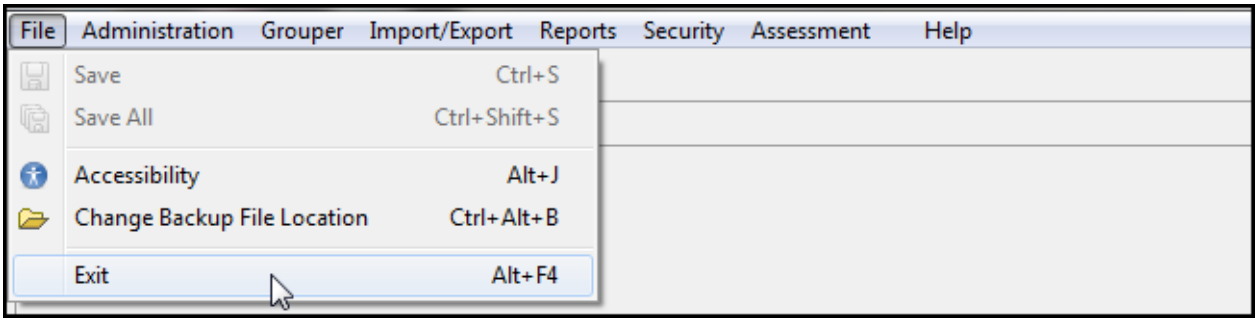
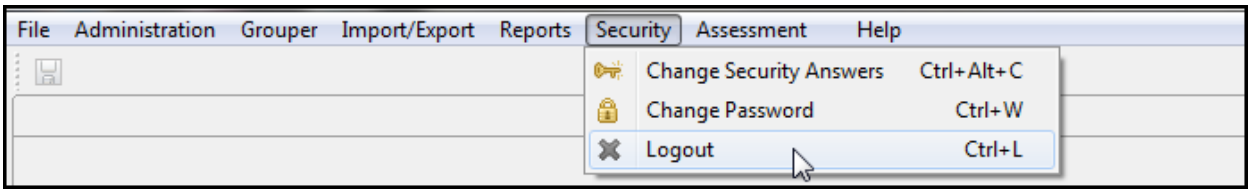
CLOSE THE APPLICATION

To close the jRAVEN application, select 'Exit' from the File drop-down on the Menu Bar. jRAVEN may also be closed by selecting the close icon in the upper right corner of the screen.



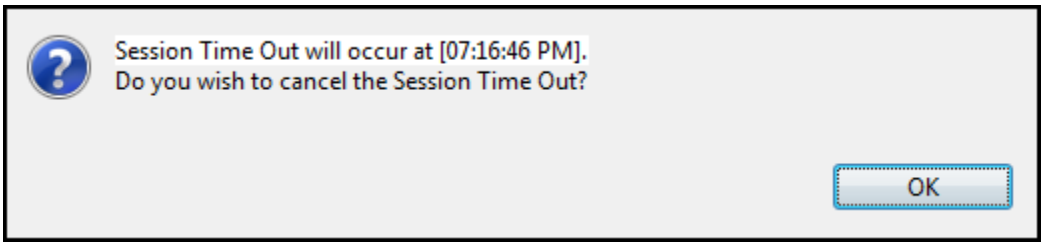
LOGOUT

To log out and return to the jRAVEN 'Login' screen, select 'Logout' from the Security drop-down on the Menu Bar.



SESSION TIME OUT

To enhance the security of data stored within the jRAVEN application, the system will issue a timeout warning if there has been no activity by the user for ten (10) minutes. The following decision message will be displayed: “Do you wish to cancel the session time out?”

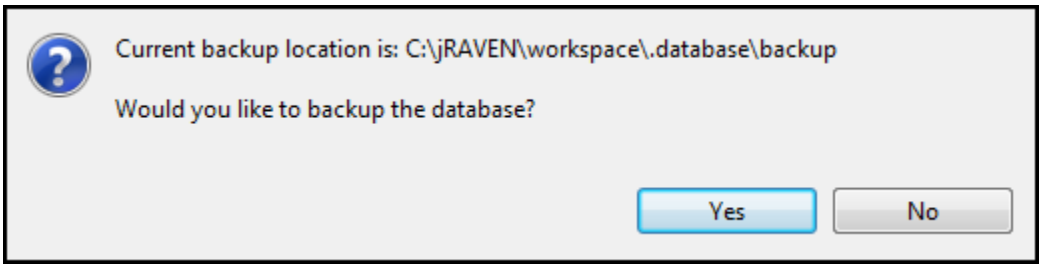


To continue with the session click ‘OK’. If the user does not cancel the session time out prior to 15 minutes of inactivity, jRAVEN will close the active screens and return the user to the ‘Login’ screen. If assessment data has been entered but not saved when a time out occurs, the application will perform an auto-save of the assessment data.

DATA BACKUP

It is strongly recommended that users backup the database each time new data is entered. In the event of data loss, database backup files may be used to restore the jRAVEN application to a previous date and time.

When closing an active session of jRAVEN, the user will receive the following decision message along with a listing of the current backup location: “Would you like to back up the database?”



- Select ‘Yes’ to back up the database and close jRAVEN.
- Select ‘No’ to decline the database backup and close the jRAVEN application.

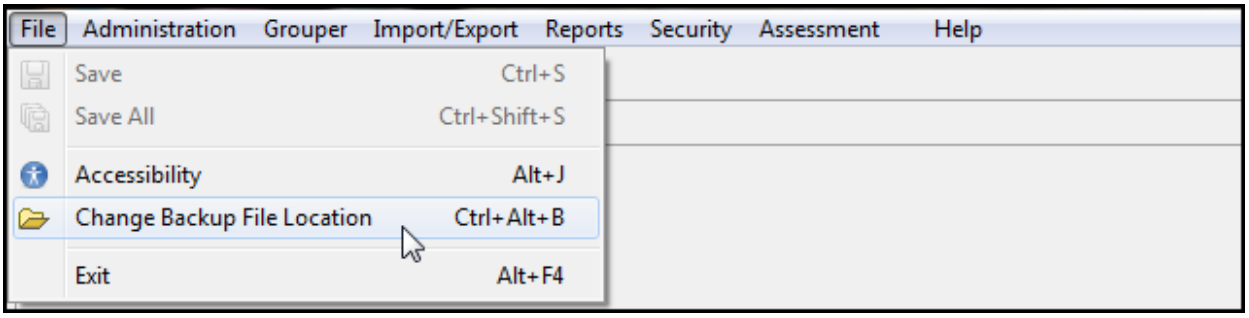
If a database backup has not occurred with one of the prior seven active sessions, jRAVEN will automatically backup the database when the application is closed.

CHANGING THE BACKUP FILE LOCATION

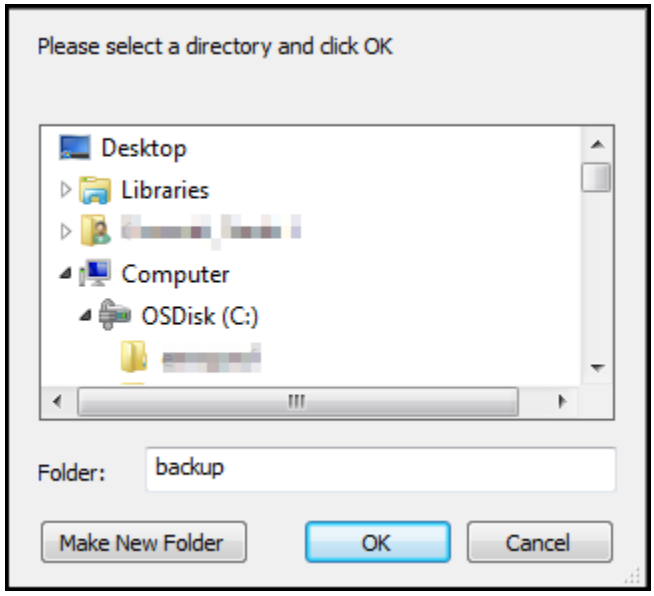
The default location for the database backup is located in a database/backup folder where the application is installed. Only a System Administrator may change the location where the backup will be stored.

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

1. Select ‘Change Backup File Location’ from the File drop-down on the Menu Bar.



The 'Change Backup File Location' pop-up window displays with the current backup location highlighted:



2. Select the desired backup location.
3. Select 'OK' to set the location and close the pop-up window.
4. Selecting 'Cancel' will close the pop-up window without changing the location of the backup file(s).

DATA RESTORE

In the event of data loss, database backup files may be used to restore the jRAVEN application to a previous date and time. A database restore requires the assistance of the QIES Help Desk. Please note, a backup file of the same version as the installed application is required to successfully restore.

When attempting to restore a database using a backup file which is older than that of the installed version of jRAVEN, the following error message will be displayed:

"The version of the backup you selected is older than the current version of jRAVEN. Please select a backup of the same version."

Select 'OK' to return to the 'Login' screen and restore using the appropriate backup file.

GET HELP

ITEM SET

The MDS RAI Manual provides users with item-specific definitions, instructions, and tips for completing MDS assessments. For item-by-item guidance, chapter three has been organized to correspond with each section of the MDS.

The MDS RAI Manual may be found on the following CMS webpage: https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment- Instruments/NursingHomeQualityInits/MDS30RAIManual.html

ICD CODING

ICD-9

For questions relating to ICD-9 coding, please visit the following CMS webpage:
https://www.cms.gov/Medicare/Coding/ICD9ProviderDiagnosticCodes/codes.html

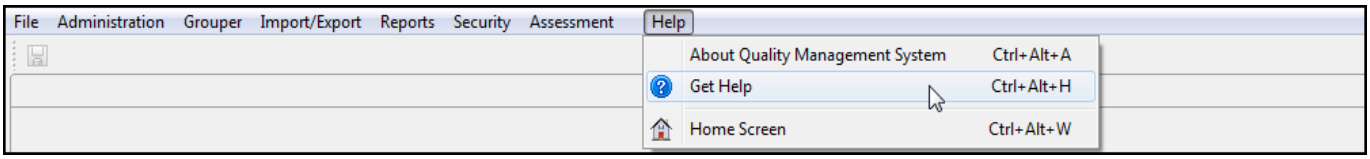
ICD-10

For questions relating to ICD-10 coding, please visit the following CMS webpage:
https://www.cms.gov/Medicare/Coding/ICD10/index.html

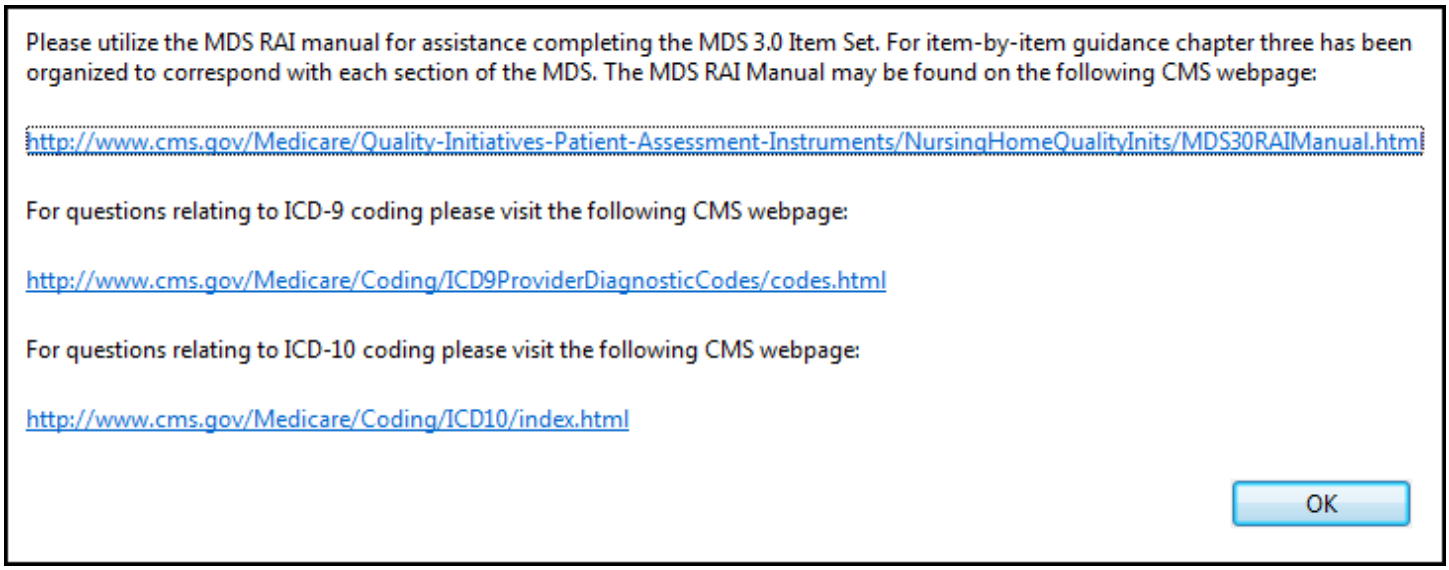
jRAVEN Help Menu

Direct links to the CMS webpages above are also available via the jRAVEN Menu Bar. Complete the following steps to access links to help documentation:

1. Select 'Get Help' from the Help drop-down on the Menu Bar.



The jRAVEN 'Get Help' screen will be displayed, including direct links to the CMS webpage where the MDS RAI Manual and/or ICD coding assistance may be found.



QIES Help Desk

For additional technical support and assistance please contact the QIES Help Desk.

Hours: Monday – Friday: 7:00 a.m. – 7:00 p.m. (CT)

Phone: 800-339-9313

Email: help@qtso.com

Website: https://qtso.cms.gov