

|  | Appendix      | Page  | June 2005 Revision                                                                                                                                                                                                                                                |
|--|---------------|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | A, D, F, G, H |       | <ul style="list-style-type: none"> <li>•Now listed as a separate file on the webpage</li> <li>•Content unchanged</li> </ul>                                                                                                                                       |
|  | B             | 1-6   | <ul style="list-style-type: none"> <li>•RAI Coordinator and Regional Office contacts updated</li> </ul>                                                                                                                                                           |
|  | C             | 94-96 | <ul style="list-style-type: none"> <li>•Psychotropic drug tables A, B, &amp; C deleted and replaced with Intentionally blank pages (2)</li> <li>•Psychotropic drug references added</li> </ul>                                                                    |
|  | E             | 1-7   | <ul style="list-style-type: none"> <li>•Medications deleted and added in each category</li> </ul>                                                                                                                                                                 |
|  | I             | 1-26  | <ul style="list-style-type: none"> <li>•Multiple line items updated according to recent application specifications</li> <li>•This table includes ONLY a compiled matrix of the revisions.</li> <li>•For the complete matrix see the entire Appendix I.</li> </ul> |

Note: This document ONLY contains the content of the revised Appendices B, C, E, & I

## **APPENDIX B**

### **STATE AGENCY CONTACTS RESPONSIBLE FOR ANSWERING RAI QUESTIONS**

**STATE AGENCY CONTACTS – MDS RAI COORDINATORS**

| <b>STATE</b> | <b>MDS RAI Coordinator</b>                       | <b>PHONE #</b>               | <b>E-mail Address</b>                                                |
|--------------|--------------------------------------------------|------------------------------|----------------------------------------------------------------------|
| AK           | Diana Parks                                      | 907-334-2491                 | Diana_Parks@health.state.ak.us                                       |
| AL           | Danna Daughtry                                   | 334-206-7929                 | dannadaughtry@adph.state.al.us                                       |
| AR           | Sue Gaines                                       | 501-682-8853                 | Sue.gaines@arkansas.gov                                              |
| AR           | Twyla Moore, RN                                  | 501-661-2201                 | tmoore@healthyarkansas.com                                           |
| AZ           | Sylvia Balistreri                                | 602-364-3878                 | balists@azdhs.gov                                                    |
| CA           | Virginia E. Aquino, RN                           | 916-552-8961                 | vaquino@dhs.ca.gov                                                   |
| CO           | Betty Keen, RN                                   | 303-692-2894                 | Betty.Keen@state.co.us                                               |
| CT           | Lori Giffin<br>Alternate: Angela White           | 860-509-7400                 | Lori.Griffin@po.state.ct.us<br>Angela.white@po.state.ct.us           |
| DC           | Mary Sklencar                                    | 202-442-4759                 | Mary.sklencar@dc.gov                                                 |
| DE           | Kim Paugh                                        | 302-424-6377                 | Kim.paugh@state.de.us                                                |
| FL           | Claire Hoagland                                  | 727-552-1133 x179            | hoaglanc@fdhc.state.fl.us                                            |
| GA           | JoAnne Hanson                                    | 404-657-5854                 | jmhanson@dhr.state.ga.us                                             |
| HI           | Janice Nakama, RN<br>Alternate: Sharon Matsubara | 808-692-7420                 | jpnakama@mail.health.state.hi.us<br>skmatsub@mail.health.state.hi.us |
| IA           | Karen Zaabel                                     | 515-242-5991                 | Kzaabel@dia.state.ia.us                                              |
| ID           | Kathleen Mace                                    | 208-334-6626                 | macek@idhw.state.id.us                                               |
| IL           | Rhonda Imhoff, RN                                | 217-785-5132                 | rimhoff@idph.state.il.us                                             |
| IN           | Kimberly Honeycutt, RN                           | 317-233-4719                 | khoneycu@isdh.state.in.us                                            |
| KS           | Lynn Searles<br>Vera Van Bruggen, RN             | 785-291-3552<br>785-296-1246 | Lsearles@kdhe.state.ks.us<br>veravanbruggen@aging.state.ks.us        |
| KY           | Ruth Rogers                                      | 502-564-2800 x4052           | Ruth.rogers@ky.gov                                                   |
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| STATE | MDS RAI Coordinator               | PHONE #                      | E-mail Address                                               |
|-------|-----------------------------------|------------------------------|--------------------------------------------------------------|
| MA    | Paul Di Natale                    | 617-753-8222                 | Paul.dinatale@state.ma.us                                    |
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| MS    | Lynn Cox                          | 601-576-7316                 | Lynn.cox@msdh.state.ms.us                                    |
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| ND    | Patricia Rotenberger              | 701-328-2364                 | Protenbe@state.nd.us                                         |
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| NH    | Susan Grimes                      | 603-271-3024                 | sgrimes@dhhs.state.nh.us                                     |
| NJ    | Beth Bell, RN                     | 609-633-8981                 | Beth.Bell@doh.state.nj.us                                    |
| NM    | Sandra Cole<br>Connie Armijo      | 505-476-9037<br>505-476-9056 | Sandra.cole@doh.state.nm.us<br>Connie.armijo@doh.state.nm.us |
| NV    | Juanita Ball, RN                  | 775-687-4475 x235            | JBall@blc.state.nv.us                                        |
| NY    | Kristin Armstrong-Ross            | 518-478-1124                 | KMA07@health.state.ny.us                                     |
| OH    | Patsy Strouse                     | 614-955-0774                 | pstrouse@odh.ohio.gov                                        |
| OK    | Sharon Warlick                    | 405-271-5278                 | Sharonlw@health.state.ok.us                                  |
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| PA    | Susan Williamson<br>Chris Kelly   | 717- 787-1816                | suswilliam@state.pa.us<br>Chkelly@state.pa.us                |
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| SC    | Sara S. Granger                   | 803-545-4205                 | Grangerss@dhcc.sc.gov                                        |
| SD    | Peggy Williams                    | 605-773-3356                 | Peggy.Williams@state.sd.us                                   |
| TN    | Leatrice Coffin                   | 615-741-8002                 | Leatrice.coffin@state.tn.us                                  |
| TX    | Cecile Hay                        | 512-438-2396                 | Cecile.hay@dads.state.tx.us                                  |

| <b>STATE</b> | <b>MDS RAI<br/>Coordinator</b> | <b>PHONE #</b>               | <b>E-mail Address</b>                              |
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| UT           | Carolyn Reese, RN              | 801-538-6599                 | carolynreese@utah.gov                              |
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**NOTE:** Not included in this manual is a list of the State MDS Automation Coordinators and the State Medicaid MDS Coordinators. These lists will be posted on the CMS web site at:

<http://www.cms.hhs.gov/medicaid/mds20>

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Irene Weizirl  
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## **APPENDIX C**

### **RESIDENT ASSESSMENT PROTOCOLS**



## WHEN TO DISCONTINUE DRUG TREATMENT

1. Drug treatment that is ineffective after a reasonable trial should be discontinued or changed. The definition of a reasonable trial depends on the drug class and therapeutic indication.
2. When a medication is effective, but produces troublesome side effects, either the dose should be reduced or the medication should be replaced, with a therapeutically equivalent agent less likely to cause the problematic side effect. If this is not feasible, or if doing it leads to a recurrence of symptoms, specific medical therapy for the troublesome side effects should be considered. For example, if the best drug for treating a resident's depression causes constipation, stool softeners, laxatives, or bulk-forming agents can be prescribed.
3. When a medication is effective and does not cause troublesome side effects, it should be continued for a defined period, and then efforts should be made to taper and eventually discontinue the drug.
4. Psychotropic medication should be prescribed on a permanent basis only if symptoms have recurred on at least two previous attempts to taper the medication after a defined period of therapy.

**Note:** The drug tables with commonly prescribed psychotropic medications by category and brand have been deleted. See Appendix E of the RAI Manual.

**Additional medication references:**

Drug Facts and Comparisons, 2003

The Orange Book, <http://www.fda.gov/cder/ob/default.htm>

The National Drug Code Directory, <http://www.fda.gov/cder/ndc/database/Default.htm>

State Operations Manual Appendix PP – Interpretive Guidelines for Long-Term Care Facilities, [http://www.cms.hhs.gov/manuals/107\\_som/som107\\_appendixtoc.asp](http://www.cms.hhs.gov/manuals/107_som/som107_appendixtoc.asp)

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## **APPENDIX E**

### **COMMONLY PRESCRIBED MEDICATIONS BY CATEGORY BY BRAND (GENERIC)**

|                                                    |
|----------------------------------------------------|
| <b>Prescribed Medications by Category by Brand</b> |
|----------------------------------------------------|

This is not an all-inclusive list

**ANTIPSYCHOTICS**

| <b>Brand</b> | <b>Generic</b>   |
|--------------|------------------|
| Abilify      | Aripiprazole     |
| Clozaril     | Clozapine        |
| Compazine    | Prochlorperazine |
| Geodon       | Ziprasidone      |
| Haldol       | Haloperidol      |
| Loxitane     | Loxapine         |
| Mellaril     | Thioridazine     |
| Moban        | Molindone        |
| Navane       | Thiothixene      |
| Orap         | Pimozide         |
| Prolixin     | Fluphenazine     |
| Risperdal    | Risperidone      |
| Serentil     | Mesoridazine     |
| Seroquel     | Quetiapine       |
| Stelazine    | Trifluoperazine  |
| Thorazine    | Chlorpromazine   |
| Trilafon     | Perphenazine     |
| Zyprexa      | Olanzapine       |

**ANTIDEPRESSANTS**

| <b>Brand</b> | <b>Generic</b>   |
|--------------|------------------|
| Anafranil*   | Clomipramine*    |
| Asendin      | Amoxapine        |
| Aventyl      | Nortriptyline    |
| Celexa       | Citalopram       |
| Desyrel      | Trazodone        |
| Effexor      | Venlafaxine      |
| Elavil*      | Amitriptyline*   |
| Lexapro      | Escitalopram     |
| Ludiomil     | Maprotiline      |
| Luvox        | Fluvoxamine      |
| Nardil*      | Phenelzine*      |
| Norpramin    | Desipramine      |
| Pamelor      | Nortriptyline    |
| Parnate*     | Tranlycypromine* |
| Paxil        | Paroxetine       |
| Prozac       | Fluoxetine       |
| Remeron      | Mirtazapine      |
| Serzone      | Nefazodone       |
| Sinequan*    | Doxepin*         |
| Surmontil*   | Trimipramine*    |
| Tofranil*    | Imipramine*      |
| Vivactil     | Protriptyline    |
| Wellbutrin   | Bupropion        |
| Zoloft       | Sertraline       |

**ANTI-ANXIETY**

| <b>Brand</b> | <b>Generic</b>    |
|--------------|-------------------|
| Atarax       | Hydroxyzine       |
| Ativan       | Lorazepam         |
| Buspar       | Buspirone         |
| Gen-Xene*    | Clorazepate*      |
| Klonopin*    | Clonazepam*       |
| Librium*     | Chlordiazepoxide* |
| Miltown*     | Meprobamate*      |
| Serax        | Oxazepam          |
| Tranxene*    | Clorazepate*      |
| Valium*      | Diazepam*         |
| Vistaril     | Hydroxyzine       |
| Xanax        | Alprazolam        |

**HYPNOTICS**

| <b>Brand</b>          | <b>Generic</b>                |
|-----------------------|-------------------------------|
| Ambien                | Zolpidem                      |
| Amytal*               | Amobarbital*                  |
| Aquachloral Suppettes | Chloral Hydrate               |
| Butisol*              | Butobarbital*                 |
| Dalmane*              | Flurazepam*                   |
| Doral*                | Quazepam*                     |
| Halcion               | Triazolam                     |
| Mebaral*              | Mephobarbital*                |
| Nembutal*             | Pentobarbital*                |
| Paral*                | Paraldehyde*                  |
|                       | Phenobarbital*                |
| ProSom                | Estazolam                     |
| Restoril              | Temazepam                     |
| Seconal*              | Secobarbital*                 |
| Sonata                | Zaleplon                      |
| Tuinal*               | Amobarbital/<br>Secobarbital* |

\*Medications generally not recommended for use in the elderly

## DIURETICS

| Brand        | Generic                                | Brand     | Generic                          |
|--------------|----------------------------------------|-----------|----------------------------------|
| Aldactazide, | Spironolactone/<br>hydrochlorothiazide | GlaucTabs | Methazolamide                    |
| Aldactone    | Spironolactone                         | Lasix     | Furosemide                       |
| Aquatensen   | Methyclothiazide                       | Lozol     | Indapamide                       |
| Bumex        | Bumetanide                             | Mannitol  | Mannitol                         |
| Daranide     | Dichlorphenamide                       | Maxzide   | Triameterene/hydrochlorothiazide |
| Demadex      | Torsemide                              | Midamor   | Amiloride                        |
| Diamox       | Acetazolamide                          | Moduretic | AmilorideHCl/hydrochlorothiazide |
| Diuril       | Chlorothiazide                         | Mykrox    | Metolazone                       |
| Dyazide      | Triamterene/<br>hydrochlorothiazide    | Naqua     | Trichlormethiazide               |
| Dyrenium     | Triamterene                            | Naturetin | Bendroflumethiazide              |
| Edecrin      | Ethacrynic Acid                        | Oretic    | Hydrochlorothiazide              |
| Enduron      | Methyclothiazide                       | Osmitol   | Mannitol                         |
| Esidrix      | Hydrochlorothiazide                    | Renese    | Polythiazide                     |
| Hydrodiuril  | Hydrochlorothiazide                    | Saluron   | Hydroflumethiazide               |
| Hygroton     | Chlorthalidone                         | Thalitone | Chlorthalidone                   |
|              |                                        | Zaroxolyn | Metolazone                       |

### NOTES:

This appendix should be used as a resource when completing Section O.

The medications identified with an asterisk, “generally not recommended for use in the elderly” are adopted from an article published in 1997 in the Archives of Internal Medicine, written by Mark Beers, M.D., entitled Potentially Inappropriate Medications in the Elderly.

### REFERENCES:

Drug Facts and Comparisons, 2003

The Orange Book, <http://www.fda.gov/cder/ob/default.htm>

The National Drug Code Directory, <http://www.fda.gov/cder/ndc/database/Default.htm>

State Operations Manual Appendix PP – Interpretive Guidelines for Long-Term Care Facilities, [http://www.cms.hhs.gov/manuals/107\\_som/som107\\_appendixtoc.asp](http://www.cms.hhs.gov/manuals/107_som/som107_appendixtoc.asp)

## Changes to the Previous Version

| 1995 Version                                                                 | January 2004 Update                                                                                                                                                                                                                                                                                                                                                                                                                     | Rationale                                                                                                                                                                                                |
|------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Title:</i> Commonly Prescribed Medications by Category by Brand (generic) | Prescribed Medications by Category by Brand                                                                                                                                                                                                                                                                                                                                                                                             | It is hard to define commonly prescribed medications. Brand and generic medications are listed.                                                                                                          |
|                                                                              | <b>Notes:</b><br>*Medications generally not recommended for use in the elderly                                                                                                                                                                                                                                                                                                                                                          | Readily identify medications for nurses/MDS coordinators.                                                                                                                                                |
|                                                                              | This appendix should be used as a resource when completing Section O.                                                                                                                                                                                                                                                                                                                                                                   | Information                                                                                                                                                                                              |
|                                                                              | The medications identified with an asterisk, “generally not recommended for use in the elderly” are adopted from an article published in 1997 in the Archives of Internal Medicine, written by Mark Beers, M.D., entitled Potentially Inappropriate Medications in the Elderly.                                                                                                                                                         | Information                                                                                                                                                                                              |
|                                                                              | This is not an all inclusive list                                                                                                                                                                                                                                                                                                                                                                                                       | New medications may become available prior to the publication of a new version                                                                                                                           |
| Antipsychotics                                                               | <p><b>Added:</b><br/>           Abilify (Aripiprazole)<br/>           Geodon (Ziprasidone)<br/>           Risperdal (Risperidone)<br/>           Seroquel (Quetiapine)<br/>           Zyprexa (Olanzapine)</p> <p><b>Deleted:</b><br/>           Sparine (Promazine)<br/>           Taractan (Chlorprothixene)<br/>           Tindal (Acetophenazine)<br/>           Vesprin (Triflupromazine)<br/>           Inapsine (Droperidol)</p> | <p>Five newly released antipsychotic agents since 1995.</p> <p>Sparine, Taractan, Tindal and Vesprin are no longer available in the USA. Inapsine is no longer classified as an antipsychotic agent.</p> |



| 1995 Version       | January 2004 Update                                                                                                                                                                                                                                                                                        | Rationale                                                                                                                                                                                                                                               |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Antianxiety Agents | <i>Deleted:</i><br>Phenobarbital<br>Anytal (Amobarbital)<br>Doriden (Glutethimide)<br>Noctec (Chloral Hydrate)<br>Noludar (Methypylon)<br>Paxipam (Halazepam)                                                                                                                                              | Phenobarbital is classified as a sedative-hypnotic agent. Anytal (correct spelling Amytal), is classified as a hypnotic agent. Doriden, Noludar and Paxipam are no longer available. Noctec, a brand of Chloral Hydrate is not available on the market. |
|                    | <i>Added:</i><br>Gen-Xene (Clorazepate)<br>Klonopin (Clonazepam)                                                                                                                                                                                                                                           | These medications are currently available and classified as antianxiety agents.                                                                                                                                                                         |
| Hypnotics          | <i>Deleted:</i><br>Alurate (Aprobarbital)<br>Placidyl (Ethchlorvynol)                                                                                                                                                                                                                                      | Alurate and Placidyl are no longer available on the market.                                                                                                                                                                                             |
| Diuretics          | <i>Added:</i><br>Demadex (Torsemide)<br>GlaucTabs (Methazolamide)<br>Microzide (Hydrochlorothiazide)<br>Mykrox (Metolazone)<br>Naqua (Trichlormethiazide)<br>Naturetin (Bendroflumethiazide)<br>Osmitrol (Mannitol)<br>Renese (Polythiazide)<br>Saluron (Hydroflumethiazide)<br>Thalitone (Chlorthalidone) | These medications are classified as diuretic agents and were not listed in the 1995 version or were released since 1995.                                                                                                                                |

| 1995 Version | January 2004 Update                                                                 | Rationale                                                |
|--------------|-------------------------------------------------------------------------------------|----------------------------------------------------------|
|              | <i>Deleted:</i><br>Aqua-Ban<br>Hydromox (Quinethazone)<br>Neptazane (Methazolamide) | These medications are no longer available on the market. |

# **APPENDIX I**

## **MDS Item Matrix**

**MDS 2.0 Item Matrix**  
**Matrix Version 4.6 (03/15/2005)**  
**Data Specifications Version: 1.20**

**Record Type Codes Used:**

- A** = Admission Assessment
- Y** = Comprehensive Assessment (Annual, Significant Change, Significant Correction of Prior Full)
- P** = Medicare PPS Assessment form (MPAF)
- N** = Full Assessment with no RAPs (Full Quarterly where required by State)
- M** = Minimum Quarterly (HCFA Standard 2-page Quarterly)
- RQ** = RUG-III Quarterly (Optional Quarterly Version for RUG-III 1997 Update)
- D** = Discharge Tracking Form
- R** = Reentry Tracking Form

**Application Codes Used:**

- RG** = RUG-III Case Mix Classification, Version 5.12 (or 5.12b)
- QI** = CHSRA Quality Indicators as defined in "Nursing Facility Quality Indicator Definitions: 11/25/97" from the Center for Health Science Research and Analysis, The University of Wisconsin at Madison
- RP** = Resident Assessment Protocols as defined in the "Long-Term Care Resident Assessment User's Manual: Version 2.0", HCFA, 1995 and in the MDS Data Specifications Version 1.01
- QM** = Quality Measures publicly reported in 11/2004 (15 QMs)

This table is **ONLY** a compiled matrix of the revisions.  
For the complete matrix see the entire Appendix I.

| MDS Item | Description                             | Item Required on Record Type |   |   |     |           |    |          |   | Item Included in Application |    |    |    |
|----------|-----------------------------------------|------------------------------|---|---|-----|-----------|----|----------|---|------------------------------|----|----|----|
|          |                                         | Full                         |   |   | PPS | Quarterly |    | Tracking |   | RG                           | QI | RP | QM |
|          |                                         | A                            | Y | N | P   | M         | RQ | D        | R |                              |    |    |    |
| AB5a     | Prior stay at this nursing home         | ✓                            |   |   | ✓   |           |    |          |   |                              |    |    | ✓  |
| AB5b     | Stay in other nursing home              | ✓                            |   |   | ✓   |           |    |          |   |                              |    |    | ✓  |
| AB5c     | Other residential facility              | ✓                            |   |   | ✓   |           |    |          |   |                              |    |    | ✓  |
| AB5d     | MH/psychiatric setting                  | ✓                            |   |   | ✓   |           |    |          |   |                              |    |    | ✓  |
| AB5e     | MR/DD setting                           | ✓                            |   |   | ✓   |           |    |          |   |                              |    |    | ✓  |
| AB5f     | Residential history: None of Above      | ✓                            |   |   | ✓   |           |    |          |   |                              |    |    | ✓  |
| AC1h     | Cycle of daily events: None of Above    | ✓                            |   |   |     |           |    |          |   |                              |    |    |    |
| AC1l     | Eating patterns: None of Above          | ✓                            |   |   |     |           |    |          |   |                              |    |    |    |
| AC1r     | ADL patterns: None of Above             | ✓                            |   |   |     |           |    |          |   |                              |    |    |    |
| A10i     | Advanced directives: None of Above      | ✓                            | ✓ | ✓ |     |           |    |          |   |                              |    |    |    |
| B3a      | Recall current season                   | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                              |    |    |    |
| B3b      | Recall location of own room             | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                              |    |    |    |
| B3c      | Recall staff names/faces                | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                              |    |    |    |
| B3d      | Recall that he/she in nursing home      | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                              |    |    |    |
| B3e      | Recall: None of Above                   | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                              |    |    |    |
| E1a      | Negative statements                     | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓                            | ✓  | ✓  | ✓  |
| E1b      | Repetitive questions                    | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓                            |    | ✓  |    |
| E1c      | Repetitive verbalizations               | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓                            |    | ✓  | ✓  |
| E1e      | Self deprecation                        | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓                            |    | ✓  | ✓  |
| E1f      | Expression of unrealistic fears         | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓                            |    | ✓  | ✓  |
| E1g      | Recurrent statements of terrible future | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓                            | ✓  | ✓  | ✓  |
| E1h      | Repetitive health complaints            | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓                            |    | ✓  | ✓  |
| E1m      | Crying/tearfulness                      | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓                            |    | ✓  | ✓  |
| E1n      | Repetitive physical movements           | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓                            | ✓  | ✓  | ✓  |
| E2       | Mood Persistence                        | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                              | ✓  | ✓  | ✓  |
| F3d      | Past roles: None of Above               | ✓                            | ✓ | ✓ |     |           |    |          |   |                              |    |    |    |
| G1aA     | Bed mobility: Self-Performance          | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓                            | ✓  | ✓  | ✓  |
| G1aB     | Bed mobility: Support Provided          | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓                            |    |    |    |
| G1bA     | Transfer: Self-Performance              | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓                            | ✓  | ✓  | ✓  |
| G1bB     | Transfer: Support Provided              | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓                            |    |    |    |
| G1cA     | Walk in room: Self-Performance          | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                              | ✓  | ✓  |    |
| G1cB     | Walk in room: Support Provided          | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                              |    |    |    |

|          |                                          | Item Required on Record Type |   |   |     |           |    |          |   | Item Included  |    |    |    |
|----------|------------------------------------------|------------------------------|---|---|-----|-----------|----|----------|---|----------------|----|----|----|
|          |                                          | Full                         |   |   | PPS | Quarterly |    | Tracking |   | in Application |    |    |    |
| MDS Item | Description                              | A                            | Y | N | P   | M         | RQ | D        | R | RG             | QI | RP | QM |
| G1dA     | Walk in corridor: Self-Performance       | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  | ✓  |    |
| G1dB     | Walk in corridor: Support Provided       | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| G1eA     | Locomotion on unit: Self-Performance     | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  | ✓  | ✓  |
| G1eB     | Locomotion on unit: Support Provided     | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| G1fA     | Locomotion off unit: Self-Performance    | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  | ✓  |    |
| G1fB     | Locomotion off unit: Support Provided    | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| G1gA     | Dressing: Self-Performance               | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  | ✓  |    |
| G1gB     | Dressing: Support Provided               | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| G1hA     | Eating: Self-Performance                 | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓              | ✓  | ✓  | ✓  |
| G1hB     | Eating: Support Provided                 | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| G1iA     | Toilet: Self-Performance                 | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓              | ✓  | ✓  | ✓  |
| G1iB     | Toilet: Support Provided                 | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| G1jA     | Personal hygiene: Self-Performance       | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  | ✓  |    |
| G1jB     | Personal hygiene: Support Provided       | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| G4aA     | Neck: Range of motion                    | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  |    |    |
| G4aB     | Neck: Voluntary movement                 | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                |    |    |    |
| G4bA     | Arm: Range of motion                     | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  |    |    |
| G4bB     | Arm: Voluntary movement                  | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                |    |    |    |
| G4cA     | Hand: Range of motion                    | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  |    |    |
| G4cB     | Hand: Voluntary movement                 | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                |    |    |    |
| G4dA     | Leg: Range of motion                     | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  |    |    |
| G4dB     | Leg: Voluntary movement                  | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                |    |    |    |
| G4eA     | Foot: Range of motion                    | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  |    |    |
| G4eB     | Foot: Voluntary movement                 | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                |    |    |    |
| G4fA     | Other: Range of motion                   | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  |    |    |
| G4fB     | Other: Voluntary movement                | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                |    |    |    |
| G5e      | Modes of locomotion: None of Above       | ✓                            | ✓ | ✓ |     |           |    |          |   |                |    |    |    |
| G6a      | Bedfast all or most of the time          | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  | ✓  | ✓  |
| G6f      | Modes of transfer: None of Above         | ✓                            | ✓ | ✓ |     | ✓         | ✓  |          |   |                |    |    |    |
| G8e      | ADL rehab potential: None of Above       | ✓                            | ✓ | ✓ |     |           |    |          |   |                |    |    |    |
| H1a      | Bowel continence                         | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  | ✓  | ✓  |
| H1b      | Bladder continence                       | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  | ✓  | ✓  |
| H2e      | Bowel elimination pattern: None of Above | ✓                            | ✓ | ✓ |     | ✓         | ✓  |          |   |                |    |    |    |
| H3d      | Indwelling catheter                      | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  | ✓  | ✓  |

|          |                                               | Item Required on Record Type |   |   |     |           |    |          |   | Item Included  |    |    |    |
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|          |                                               | Full                         |   |   | PPS | Quarterly |    | Tracking |   | in Application |    |    |    |
| MDS Item | Description                                   | A                            | Y | N | P   | M         | RQ | D        | R | RG             | QI | RP | QM |
| H3i      | Ostomy present                                | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  |    | ✓  |
| H3j      | Appliances and programs:<br>None of Above     | ✓                            | ✓ | ✓ |     | ✓         | ✓  |          |   |                |    |    |    |
| I1a      | Diabetes mellitus                             | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    | ✓  |
| I1x      | Paraplegia                                    | ✓                            | ✓ | ✓ | ✓   |           |    |          |   |                |    |    |    |
| I1z      | Quadriplegia                                  | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| I1rr     | Diseases: None of Above                       | ✓                            | ✓ | ✓ |     |           | ✓  |          |   |                |    |    |    |
| I2m      | Infections: None of Above                     | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                |    |    |    |
| J1h      | Fever                                         | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    | ✓  |    |
| J1k      | Recurrent lung aspirations in<br>last 90 days | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    | ✓  |    |
| J2a      | Pain: Frequency                               | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                |    |    | ✓  |
| J2b      | Pain: Intensity                               | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                |    |    | ✓  |
| J4a      | Fell in past 30 days                          | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  | ✓  | ✓  |
| J4b      | Fell in past 31-180 days                      | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                |    | ✓  | ✓  |
| K3a      | Weight loss                                   | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   | ✓              | ✓  | ✓  | ✓  |
| K4c      | Leaves 25%+ food uneaten<br>at most meals     | ✓                            | ✓ | ✓ |     |           |    |          |   |                |    | ✓  | ✓  |
| K4d      | Nutritional problems: None of<br>Above        | ✓                            | ✓ | ✓ |     |           |    |          |   |                |    |    |    |
| K5i      | Nutritional approaches: None<br>of Above      | ✓                            | ✓ | ✓ |     | ✓         | ✓  |          |   |                |    |    |    |
| L1g      | Oral status: None of Above                    | ✓                            | ✓ | ✓ |     |           |    |          |   |                |    |    |    |
| M3       | History of resolved ulcers                    | ✓                            | ✓ | ✓ | ✓   |           |    |          |   |                |    | ✓  | ✓  |
| M4h      | Other skin problems: None of<br>Above         | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| M5j      | Skin treatments: None of<br>Above             | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| M6g      | Foot problems: None of<br>Above               | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| N1d      | Awake: None of Above                          | ✓                            | ✓ | ✓ | ✓   | ✓         | ✓  |          |   |                | ✓  |    |    |
| N3e      | Activity settings: None of<br>Above           | ✓                            | ✓ | ✓ |     |           |    |          |   |                |    |    |    |
| N4m      | Activity preferences: None of<br>Above        | ✓                            | ✓ | ✓ |     |           |    |          |   |                |    |    |    |
| O3       | Injections (number days)                      | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P1al     | Ventilator or respirator                      | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P1as     | Special treatments: None of<br>Above          | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| P1baA    | Speech therapy: # days                        | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P1baB    | Speech therapy: total #<br>minutes            | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P1bbA    | Occupational therapy: # days                  | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P1bbB    | Occupational therapy: total #<br>minutes      | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P1bcA    | Physical therapy: # days                      | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P1bcB    | Physical therapy: total #<br>minutes          | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |

|          |                                                 | Item Required on Record Type |   |   |     |           |    |          |   | Item Included  |    |    |    |
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|          |                                                 | Full                         |   |   | PPS | Quarterly |    | Tracking |   | in Application |    |    |    |
| MDS Item | Description                                     | A                            | Y | N | P   | M         | RQ | D        | R | RG             | QI | RP | QM |
| P1bdA    | Respiratory therapy: # days                     | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P1bdB    | Respiratory therapy: total # minutes            | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| P1beA    | Psychotherapy: # days                           | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| P1beB    | Psychotherapy: total # minutes                  | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| P2a      | Special behavioral symptom evaluation program   | ✓                            | ✓ | ✓ |     |           |    |          |   |                |    |    |    |
| P3a      | Nursing rehab: Range of motion (passive)        | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P3b      | Nursing rehab: Range of motion (active)         | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P3c      | Nursing rehab: Splint or brace assistance       | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P3d      | Nursing rehab: Bed mobility                     | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P3e      | Nursing rehab: Transfer                         | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P3f      | Nursing rehab: Walking                          | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P3g      | Nursing rehab: Dressing or grooming             | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P3h      | Nursing rehab: Eating or swallowing             | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P3i      | Nursing rehab: Amputation/prosthesis care       | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P3j      | Nursing rehab: Communication                    | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   | ✓              |    |    |    |
| P3k      | Nursing rehab: Other                            | ✓                            | ✓ | ✓ | ✓   |           | ✓  |          |   |                |    |    |    |
| R1a      | Participate in assessment: Resident             | ✓                            | ✓ | ✓ |     |           |    |          |   |                |    |    |    |
| R1b      | Participate in assessment: Family               | ✓                            | ✓ | ✓ |     |           |    |          |   |                |    |    |    |
| R1c      | Participate in assessment: Significant other    | ✓                            | ✓ | ✓ |     |           |    |          |   |                |    |    |    |
| T1aA     | Recreation therapy: # of days                   |                              |   |   |     |           |    |          |   |                |    |    |    |
| T1aB     | Recreation therapy: Total # minutes             |                              |   |   |     |           |    |          |   |                |    |    |    |
| T1c      | Ordered therapy: Estimated days until day 15    |                              |   |   | ✓   |           |    |          |   | ✓              |    |    |    |
| T1d      | Ordered therapy: Estimated minutes until day 15 |                              |   |   | ✓   |           |    |          |   | ✓              |    |    |    |
| VA01a    | Delirium: Triggered                             | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA01b    | Delirium: Proceed with care                     | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA02a    | Cognitive loss: Triggered                       | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA02b    | Cognitive loss: Proceed with care               | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA03a    | Visual function: Triggered                      | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA03b    | Visual function: Proceed with care              | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA04a    | Communication: Triggered                        | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA04b    | Communication: Proceed                          | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |



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|          |                                            | Full                         |   |   | PPS | Quarterly |    | Tracking |   | in Application |    |    |    |
| MDS Item | Description                                | A                            | Y | N | P   | M         | RQ | D        | R | RG             | QI | RP | QM |
|          | with care                                  |                              |   |   |     |           |    |          |   |                |    |    |    |
| VA05a    | ADL function: Triggered                    | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA05b    | ADL function: Proceed with care            | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA06a    | Urinary incontinence: Triggered            | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA06b    | Urinary incontinence: Proceed with care    | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA07a    | Psychosocial well-being: Triggered         | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA07b    | Psychosocial well-being: Proceed with care | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA08a    | Mood state: Triggered                      | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA08b    | Mood state: Proceed with care              | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA09a    | Behavior symptoms: Triggered               | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA09b    | Behavior symptoms: Proceed with care       | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA10a    | Activities: Triggered                      | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA10b    | Activities: Proceed with care              | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA11a    | Falls: Triggered                           | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA11b    | Falls: Proceed with care                   | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA12a    | Nutritional status: Triggered              | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA12b    | Nutritional status: Proceed with care      | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA13a    | Feeding tubes: Triggered                   | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA13b    | Feeding tubes: Proceed with care           | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA14a    | Dehydration: Triggered                     | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA14b    | Dehydration: Proceed with care             | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA15a    | Dental care: Triggered                     | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA15b    | Dental care: Proceed with care             | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA16a    | Pressure ulcers: Triggered                 | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA16b    | Pressure ulcers: Proceed with care         | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA17a    | Psychotropic drug use: Triggered           | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA17b    | Psychotropic drug use: Proceed with care   | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA18a    | Physical restraints: Triggered             | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |
| VA18b    | Physical restraints: Proceed with care     | ✓                            | ✓ |   |     |           |    |          |   |                |    |    |    |