

**You are cordially invited to attend the Centers for Medicare and Medicaid Services (CMS)**

## **MDS 3.0: Part I - An Introduction**

### **Satellite Broadcast and Webcast**

**Thursday, December 17, 2009**

**1:00 PM–2:00 PM EDT**

**PLEASE ADJUST TIMES FOR YOUR TIMEZONE**

On December 17, the CMS will sponsor a live satellite broadcast and webcast entitled “**MDS 3.0: Part I - An Introduction.**” This program will be the first of a three-part series focused on providing information on the Minimum Data Set Version 3.0 (MDS 3.0) due to be implemented on October 1, 2010 by nursing homes across the nation. This program will focus on providing information regarding the major areas of change to, & impacts as a result of implementation of, the MDS, as well as plans and resources for the implementation of the instrument in October, 2010. The target audiences consist of the Regional & State Survey and Medicaid agencies, including the Regional & State LTC surveyors and RAI/MDS Coordinators, and nursing home providers.

#### **Target Audience**

**This broadcast is mandatory for CMS Regional Office (RO) and State Agency (SA) Long Term Care (LTC) surveyors, surveyor trainers, RAI Coordinators, and MDS Automation Coordinators.** Nursing home providers are also a target audience.

#### **Goal**

The goal is to provide LTC surveyors, RAI & MDS Coordinators, & nursing home staff with an overview of the MDS 3.0, including the major areas of change to, & impacts as a result of implementation of, the MDS, as well as plans and resources for the implementation of the instrument in October, 2010.

#### **Objectives**

After viewing this program, participants will be able to:

- Explain three ways in which Section Q of the MDS 3.0 will differ from Section Q of the MDS 2.0;
- Explain three ways in which transmission of MDS 3.0 assessments will differ from transmission of MDS 2.0 assessments;
- Identify 3 goals CMS had in designing the MDS 3.0;
- Identify two of the differences between the RUG-III and RUG-IV SNF PPSs;
- Identify several of the training opportunities that will be available on the MDS 3.0; and
- Identify the address of the CMS MDS 3.0 website where information on the MDS 3.0 can be found, including the RAI Manual, data specifications, and training opportunities.

#### **Moderator**

David Nolley, Production Technician, CMS

## **Presenters**

Ellen Berry, Health Insurance Specialist, CMS  
Thomas Dudley, Health Insurance Specialist, CMS  
Sheila Lambowitz, Director, CMS  
Mary Pratt, Director, CMS  
Karen Schoeneman, Deputy Director, CMS  
John Sorensen, Health Insurance Specialist, CMS  
Christina Stillwell-Deaner, Nurse Consultant, CMS  
Michael Stoltz, Technical Director, CMS  
Jack Williams, Director, CMS

## **Registration and Viewing Instructions:**

### **Satellite Technical Specifications**

This broadcast will be available only on CMS's digital network. Specific satellite technical specifications are available at <http://surveyortraining.cms.hhs.gov> or can be obtained by calling 1-800-401-9387.

### **Webcast Information**

This program will also have a live webcast, and will be available as an archived webcast for viewing after December 17, 2010, at <http://surveyortraining.cms.hhs.gov/>.

### **Handouts**

Handouts for this broadcast are available at <http://surveyortraining.cms.hhs.gov>.

### **Videotapes**

Videotaped copies of this program can be obtained from the National Technical Information Services (NTIS) 2 weeks following the transmission of this broadcast: <http://www.ntis.gov> and address: 5285 Port Royal Road, Room 1008, Sills Building, Springfield VA, 22161 - 1-703-605-6186.

### **Surveyors**

Individual registration is available on the CMS Survey and Certification Training Group website: <http://surveyortraining.cms.hhs.gov>. If you are a new user to this website, you will need to create a new account. Registration is required to obtain training certificates.

### **Non-Surveyors**

To view a live or archived broadcast you do not need to register. Simply click on Satellite Broadcast or Archived Webcast at <http://surveyortraining.cms.hhs.gov>.

### Agenda (approximate)

Time (EDT)	Topic	Presenter
1:00 p.m.	<b>Opening &amp; Introduction</b>	Program Moderator (David Nolley, CMS)
1:05 p.m.	<b>Overview of the RAI/MDS &amp; Introduction to the MDS 3.0</b>	Mary Pratt, CMS Thomas Dudley, CMS
1:15 p.m.	<b>MDS 3.0: The CAAs &amp; LTC Survey Program Impacts</b>	Karen Schoeneman, CMS Christina Stillwell-Deaner, CMS
1:25 p.m.	<b>MDS 3.0 &amp; Returning to the Community</b>	John Sorensen, CMS
1:35 p.m.	<b>MDS 3.0: SNF PPS &amp; Payment Refinement</b>	Sheila Lambowitz, CMS Ellen Berry, CMS
1:45 p.m.	<b>MDS 3.0: Data</b>	Jack Williams, CMS Michael Stoltz, CMS
1:55 p.m.	<b>MDS 3.0 Education</b>	Program Moderator (David Nolley, CMS)
2:00 p.m.	<b>Closing</b>	Program Moderator (David Nolley, CMS)

### Biographical Information

#### **Ellen M. Berry, PT**

Ellen is a senior clinical policy and research analyst with the Division of Institutional Post-acute Care at CMS. She is the CMS lead analyst for SNF clinical issues with regards to payment and policy, and has more than 15 years of experience as a physical therapist and rehabilitation manager. She has spent more than 10 years in the long-term care and skilled nursing facility settings, and has received multiple awards for her work on SNF issues, post-acute care payment reform demonstration and nursing home value based purchasing, including two Administrator's Achievement Awards, an Administrator's Citation, and a Secretary of Human Health Service award. Her current responsibilities include, but are not limited to:

- CMM lead for the CMS MDS team (2.0 & 3.0) and SNF swing beds
- CMM for the post-acute care payment reform demonstration
- Chronic Care Policy Group lead for Therapy Resource Group and assists with therapy issues in other components
- Clinical lead for RUG refinements and policy and payment related to SNF PPS
- Clinical lead for policy and payment related to SNF PPS, including SNF swing beds
- Division Senior Policy Advisor for:
  - Long-term Task Force and Nursing Home Value-Based Purchasing Subcommittee
  - SNF staff time study
  - CARE tool design and implementation
  - PAC demo design, implementation and analysis

**Thomas Dudley, MS, RN**

Tom has been with CMS since 2000 and is a health insurance specialist with the Division of Chronic and Post Acute Care in the Office of Clinical Standards and Quality. His duties include the development and public reporting of ESRD and Nursing Home clinical performance measures and overseeing the development and implementation of MDS 3.0. His past CMS projects have included the development of the many databases on [www.medicare.gov](http://www.medicare.gov) including the Prescription Drug Plan Finder and Online Enrollment Center, Dialysis Facility Compare, Nursing Home Compare (associated with the Nursing Home Quality Initiative), Your Medicare Coverage, and the Medicare Eligibility Tool. Tom's education includes a M.S. in Nursing and Business Administration, and a B.S. in Nursing, from the University of Maryland. His professional health care background spans over 20 years in the public and private sectors with experience in the planning, implementation and management of multidisciplinary health care programs.

**Sheila Lambowitz, M.B.A.**

Ms. Lambowitz is the director of the CMS Division of Institutional Post Acute Care with the Center for Medicare Management. She is a nationally recognized expert in nursing facility RUG-III prospective payment systems, and has more than 25 years of experience in Medicare and Medicaid health policy, many of those in post acute care. Her current responsibilities for the national SNF and swing bed prospective payment system include development of payment, coverage, and billing policies related to PPS and consolidated billing, preparation of annual SNF PPS rate updates and regulations, RUG III refinements research, chairing the SNF Open Door Forum and providing a liaison with other components in CMS on MDS and quality monitoring issues. Prior work has included the design and administration of the Ohio Medicaid RUG-III PPS system, and the development of Medicare medical review programs for home health, SNF, swing beds and hospice for a fiscal intermediary.

**David Nolley**

Dave is a production technician with the Division of Multimedia and Broadcast Communications in the Creative Services Group of CMS' Office of External Affairs (OEA). He joined the agency in 2004, just two years removed from a nearly 21-year career with the U.S. Air Force, where he earned a degree in public affairs and learned the trade of radio, television and video production. Dave served in Seoul, South Korea as a producer for the special projects section before moving on to radio and television news. He has covered visits from Secretary of State Madeleine Albright and Vice President Gore, in addition to interviewing Defense Secretary William Cohen. In Germany he served as spot production chief before being installed as interim news director, and after placing second in a worldwide competition, he served as the news director until his departure in the spring of 2000. His duties at CMS include everything from DVD duplication to set and lighting design, cameraman, and on-air talent. Dave has served as host for several different CMS productions over the past few years, including several recently hosted Medicine Dish programs for the Tribal Affairs Group (TAG).

**Mary Pratt, MSN, RN**

Mary is director of the Division of Chronic and Post Acute Care in the Quality Measurement and Health Assessment Group in the Office of Clinical Standards and Quality at CMS. This division is responsible for leading the Agency's instrument development and performance measurement

activities in such care settings as dialysis facilities, nursing homes, hospice, home health agencies and development of the post acute care instrument, CARE or Continuity Assessment Record and Evaluation. The work of the division is to provide consumers with quality information to make informed choices in selecting providers of services, and enabling clinicians and providers to use measures for quality improvement. Mary Pratt has been at CMS since 1985 with experience supporting and directing national projects and activities related to quality measurement, improvement and health assessment in long term care settings, especially nursing homes. In partnership with colleagues at CMS, she co-leads the implementation of the Minimum Data Set (MDS) 3.0. Mary Pratt received a master's degree in mental health nursing from the University of Virginia, and is a 1979 graduate of GMU School of Nursing, Fairfax Virginia.

### **Karen Schoeneman, MPA**

Karen serves as the deputy director of the Division of Nursing Homes in the Survey & Certification Group at CMS. She manages the division's clinical team, which has responsibility for the long term care survey process, the interpretive guidelines, and the new Quality Indicator Survey (QIS) process. She has trained over 5,000 surveyors as part of the CMS Basic Long-Term Care (LTC) training course, and has executively produced several CMS live satellite broadcasts including shows on the activities requirements, quality of life, culture change and dementia care, among others. She is a nationally recognized expert in culture change and is the CMS lead for this topic. She was the CMS lead for the April, 2008 CMS/Pioneer Network "Creating Home in the Nursing Home" national public symposium on culture change and the environment requirements.

### **John E. V. Sorensen**

John is a Health Insurance Specialist with the Disabled & Elderly Health Programs group at CMS. A graduate of the University of Maryland at College Park, John has been an advocate all his life - first, for himself, and later as the leader of a statewide self-advocate disability rights group in Maryland. Under his leadership the group became a force at the Maryland legislature, in the State's Medicaid offices and numerous other areas affecting the lives of Marylanders with physical and developmental disabilities. This later led John to national disability policy issues. Now, John brings his background as a person with a life-long disability and Medicaid recipient to CMS. John has helped develop the new Minimum Data Set (MDS) Version 3.0 and worked particularly on Section Q (returning to the community). John is also a project officer for the Money Follows the Person (MFP) Rebalancing Demonstration and oversees the program for seven States.

### **Christina Stillwell-Deaner, MPH, RN**

Christina is a nurse consultant for the Division of Nursing Homes in the Survey & Certification Group at CMS. She is the survey and certification group's lead on the MDS and continence issues, including being a member of the MDS 3.0 development team. She joined CMS seven years ago, and has also been involved with national provider outreach and education campaigns, as well as Medicare fiscal intermediary, carrier, A/B MAC, and durable medical equipment regional contractor issues during her tenure. She is a clinical nurse with experience in surgery and pediatric and adolescent disabilities. Christina earned her master's degree in public health from the University of Massachusetts, her bachelor's degree in nursing from Villa Julie College, and her bachelor's degree in biology from Towson University.

**Michael Stoltz**

Mike is a technical director with the Division of National Systems in the Finance, Systems, and Budget Group of the Center for Medicaid and State Operations. He is responsible for the technical aspects of the MDS, as well as the infrastructure where the MDS and the rest of the systems in the Quality Improvement and Evaluation System (QIES) reside. Prior to his 15 years with the CMS, Mike worked for the United States Army Security Assistance Command as a developer, system architect, communications engineer and a lead analyst for the Army's International Logistics program. His 28 years of work in the information technology field was preceded by his training in the Penn State Computer Science program.

**Jack Williams**

Jack is the director of the Division of National Systems in the Finance, Systems, and Budget Group of the Center for Medicaid and State Operations. During his 29 years of service in the Federal Government, Mr. Williams has worked for the Department of Defense, the Social Security Administration (SSA), and for the past 20 years for the CMS. Mr. Williams has worked in computer systems development for 26 years with SSA and CMS. At SSA he was responsible for the maintaining the Master Beneficiary Record and the Treasury files. At CMS, Mr. Williams has worked with the Peer Review/Quality Improvement Organizations systems, the Survey and Certification Online Survey, Certification and Reporting (OSCAR) system, and the Quality Improvement and Evaluation System (QIES.) He has a Bachelor of Science degree in Business Administration from the University of Baltimore.

## TECHNICAL FACT SHEET

**DATE:** December 17, 2009

**TEST TIME:** 12:30 – 1:00 p.m. EDT  
11:30 – 12:00 p.m. CDT  
10:30 – 11:00 a.m. MDT  
9:30 – 10:00 a.m. PDT

**PROGRAM TIME:** 1:00 – 2:00 p.m. EDT  
12:00 – 1:00 p.m. CDT  
11:00 – 12:00 p.m. MDT  
10:00 - 11:00 p.m. PDT

**Webcast troubleshooting:** 1-866-216-7470

**CMS satellite trouble number:** 410-786-3618

**CMS digital network:** Channel 712