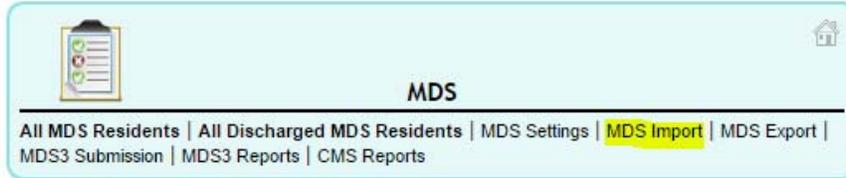


MDS Import Instructions

From the HQ Home page, select “MDS Import”...



Before importing anything, you will need to adjust the “Import Settings” to what you are needing. You can find a button/link to this page on the “MDS Import” page...



Due to software differences, when importing MDS Assessments, you will need to set the assessments being imported as do not validate, marked/locked, and submitted/accepted...

MDS Import Settings

- Do Not Validate **Do Not Validate**
- Set Version Based on ARD A2300 XML SVC Code
- Set as Mark and Lock **Set as Mark and Lock**
- Set as Submitted and Accepted **Set as Submitted and Accepted**
- Recalculate the RUG Recalculate the RUG

Once the import settings are saved, return to the “MDS Import” page (the import settings page should have opened in a new tab, once it’s saved, close that tab and then refresh the “MDS Import” page).

Next you will need to upload the zip file that contains 5-10 XML files (doing more than 15 files will extremely slow down the system). To upload the zip file, select the “Upload New File” button on the blue “MDS ZIP FILES” section header...



Then select “Choose File”...

Browse to your file, select it, select “Open”, select “Save”. You should then see you residents and their assessments under the “RESIDENT IMPORTS” section header.

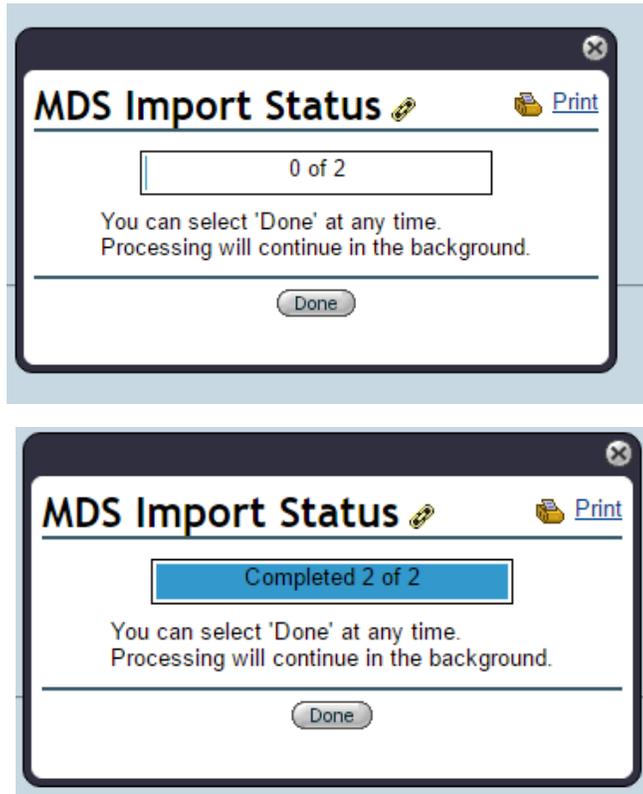
RESIDENT IMPORTS									
Include	Full Name	Resident Record	As Disch. Resident	Document Name	Processed	ARD/Target	ISC	Type of Assessment	
<input checked="" type="checkbox"/>	Test, MDS	Create	<input type="checkbox"/>	MDS20160502_350757.xml	No	05/02/2016	NC	A. OBRA Reason: 03. Annual B. PPS Assess: 99. Not PPS C. PPS OMRA: 0. No F. Entry/Discharge: 99. Not entry/discharge	
				MDS20160502_349215.xml	No	02/03/2016	NQ	A. OBRA Reason: 02. Quarterly B. PPS Assess: 99. Not PPS C. PPS OMRA: 0. No F. Entry/Discharge: 99. Not entry/discharge	

Here’s a brief explanation of each column that you see within this section...

- **Include:** if this is checked, the system will “include” this resident’s assessments in the import
- **Full Name:** resident’s name
- **Resident Record:** Create/Exists. If you see “Create”, then the resident record AND assessment will be created with the import. If you see “Exists”, then just the assessment will be created with the import.
- **As Disch. Resident:** select this box if you want the resident’s record created as a discharged resident
- **Document Name:** this is the name of the XML file within the zip
- **Processed:** No/Yes. This will show “Yes” if the assessment has been successfully imported. “No” means the assessment has not been imported.
- **ARD/Target:** the ARD or Target date of the assessment listed
- **ISC:** the ISC of the assessment listed

- **Type of Assessment:** the A0310 fields from the assessment’s XML

To import, you should select “Include” checkbox (may already be selected by default). You may also want to select the “As Disch. Resident” checkbox. Then select the “Process” button (select the one within the “RESIDENT IMPORTS” section, NOT the one within the “MDS ZIP FILES” section). After select “Process” a pop-in window will show letting you know the status of the import...



You may select “Done” and continue with other work while this processes. You are waiting to see a “Yes” in the “Processed” column for each resident included with import. You may also notice that the “Resident Record” column may change from “Create” to “Exists”...

RESIDENT IMPORTS						
Include	Full Name	Resident Record	As Disch. Resident	Document Name	Processed	ARI
<input checked="" type="checkbox"/>	Test, MDS	Exists	<input type="checkbox"/>	MDS20160502_350757.xml	Yes	05/
				MDS20160502_349215.xml	Yes	02/

Once all assessments have been imported, you should delete the zip file, and upload a new one to continue. Select the “Delete Zip File” checkbox, then click the “Process” button...

MDS ZIP FILES		
Import Date	MDS Zip File	Delete Zip File
	MDS201605022.zip	<input checked="" type="checkbox"/>

Process

This will clear out the “RESIDENT IMPORTS” and the “MDS ZIP FILES”. You can then upload a new zip file and continue importing until you are finished.

*****Notes:**

1. We have had some recent issues where the Import does not work. If this happens, you will need to contact Client Care to clear out the current attempt. This is usually do to the format of one or more XML files within the uploaded zip file. You may try importing one XML file at a time, until the problem XML file is found.
2. If you attempt to import a Correction Assessment, BEFORE the original assessment has been imported, the import will most likely not work. You will, again, need to contact Client Care to clear out the current attempt.