# MDS 3.0 – the GENERIC REPORT
## Analytics and Reports

This report allows you to focus on a group of questions in order to be able to see trends in your facility. Recently we have been asked for a way to generate an estimated average Case Mix Index based on Medicaid residents for a period of time. We have added a few new features to this report to help you.

## What's new?

Document type options – In addition to the tracking forms, statutory assessments, and Medicare assessments, you will be able to select Medicaid assessments as a sort option. The system will filter assessments based upon your answer to the Section S question regarding Primary Payor (Medicaid, Medicaid Pending, or Managed Medicaid products).

Output options – In addition to portrait and landscape for printed text reports, you may now specify an excel output. This allows you to select many more questions and directly export the results to a spreadsheet.

## How can you calculate an average Case Mix Index?

1. **Include Only** – use the drop-down to select Medicaid as the type of assessment to display.
2. Enter the **date range** for the assessments you wish to gather.
3. **Include those flagged** as not to be submitted? It should not matter since all Medicaid (as Primary Payor) assessments should have been submitted. If you run the report with the flag question set to no and think assessments are missing, then include the flag and compare the results. If they are different, you will need to research whether some were possibly set up incorrectly.
4. **Select Excel** as your export option. Press **OK**.
5. Place an X next to each of the **QUESTIONS** you want to see. For example, you may wish to see any of the date questions from Section A, Section S Primary Payor, and Section Z state RUG score. There are many different possible combinations. Note, the Section S questions are listed last in the list.
6. Click FINISH.

The report will display the resident's name, Medical Record number, ARD for each assessment, assessment type, and then the answer for each of the questions you have selected. If you chose the State RUG score, you will have an additional column for the index associated with the RUG. Use the excel tools to then generate an average (or to complete various sorts and other various calculations).

Hint, if a column does not appear wide enough, place your cursor on the line that divides two columns labeled with the alphabet and double click. The width of the column will automatically adjust.

Please note, as of July 2019, the change in how the case mix is calculated was just in the proposal stages and under executive review. To read more,
https://www.leadingageny.org/providers/nursing-homes/reimbursement1/medicaid/leadingage-ny-other-groups-urge-cms-to-disapprove-statee28099s-case-mix-proposal/