**Idaho Case Mix**

**Picture dates:** 1/1, 4/1, 7/1, and 10/1

**Assessments used**
1. Most recent assessment with Z0500b on or before the Picture Date where a RUG score can be calculated using RUG-IV, 48 group. This includes all OBRA assessments (except Discharges) and excludes stand-alone PPS OMRA assessments (COT, EOT, SOT) and the new Medicare Part A PPS Discharge Assessment (NPE). If the most recent assessment is a stand-alone PPS OMRA or Medicare Discharge, we will look back to a preceding assessment that can be “rugged” under RUG-IV.
2. If the most recent record is a reentry (A1700 coded as 2, A0310F=1), we will look back to the record preceding or combined with a Discharge Return Anticipated (A0310F=11).
3. Residents who are discharged on or before the picture date will not be included in the Case Mix calculation.
4. There is no default rate for late completed MDSs. If an assessment is submitted late, the previous assessment will continue to be used.

**Payor Source**
1. Payor Source is no longer a field in the MDS. If the resident was on a Case Mix listing (in any facility) the previous quarter, the payor source is carried forward to the current quarter.
2. If the resident is new, and the most recent assessment is Medicare PPS, we assume the payor source is Medicare. If the assessment is not a Medicare PPS assessment and there is a Medicaid number in A0700, we will list the payor source as Medicaid.

**Resident Roster Review**
1. The data is pulled for the Case Mix Listing 3-4 weeks after the picture date to allow for submission of MDS assessments.
2. Resident Listings are sent to Providers within 4-6 weeks after the picture date.
3. Providers are asked to review the listing for any discharged residents who show on the listing. If the resident was discharged on or before the picture date, they should be removed from the listing. Indicate this by writing *Discharged mm/dd/yy* on the correction line. The Discharge MDS should also be submitted through the QIES ASAP system.
4. Providers are expected to review the listing for accurate payor source as of the Picture Date. If a resident is Medicaid Pending as of the Picture Date, then correct the payor source to Medicaid.
5. Please return the corrected Resident Listing by the date indicated on the Cover Letter. This is usually about 2 weeks from the date the listings were sent.

If you have any questions, contact Jan Courtney at Myers and Stauffer LC. Phone: 1-800-263-5339. Email: janc@mslc.com