



Using the Idaho UAI and NSA

State Reports for Idaho

The state of Idaho requires the maintenance of two forms by assisted living facilities, the Uniform Assessment Instrument (UAI) and the Negotiated Service Agreement (NSA). These requirements can be met using the customized forms and reports available in BlueStep's HQ Management System.

Initial Assessment

State regulations require an initial assessment of the prospective resident before he or she is admitted to an assisted living facility.

Assessing an Inquiry

When a prospective resident (an Inquiry) is ready to be assessed, go to the Marketing/Inquiry Database section on the HQ Home page and click the link, **Select Active Inquiry**. Click the [Select](#) link next the name of the appropriate individual. On the left-side navigation menu, click the red link, **Move Inquiry to Pending (Initial Nursing Assessment – ID)**. This wizard automatically steps you through the four (4) sections of the UAI, the NSA and the important 'Resident Information' and 'Next of Kin' forms. Do NOT use the Initial Nursing Assessment link in the Resident Database section in this situation.

Enter a date on each page and fill in the appropriate information. Click the 'Staff signature' box at the bottom, then the Next button. If you need to check data entered on a previous page, you may use the bubble tabs at the upper-right of the screen to navigate back to the desired page. On the final page, click the Save button to post the entire assessment/agreement.

If you are interrupted while performing the assessment, you may save your work by stepping through the remaining forms. Enter a date on each page – it is quickest to click the calendar icon , then select the current day – then clicking the Next or Save buttons at the bottom of the screens.

! As soon as practical, you **MUST** return to this resident (now listed as a Pending Resident) and complete every page that was saved without full data. The forms are available on the navigation menu listed under the Idaho State Forms folder, shown as UAI sections 1 through 4 and NSA (Agreement ID). Select the form, then click the edit pencil icon  opposite the assessment date. On the NSA, be sure the View Layout in the upper right is set to **Generic**. Fill out the fields, check the 'Staff signature' box and click the Save button at the bottom.

Assessing a Non-Inquiry, New Individual

The Initial Nursing Assessment link in the Resident Database section is provided for use if an individual must be assessed, but has not previously been entered anywhere into the HQ System. It contains several forms in addition to the UAI and NSA forms that should be filled out for new individuals. If time is short, nursing staff may want an office staff member to fill out the forms with general information and dates, then

Save all the pages. A nursing staff member can then find this individual under Pending Residents and complete the UAI and NSA forms (five total).

Signable Printouts

When the assessment and agreement forms are complete, a printable copy of the NSA is available for staff and resident signatures. From the resident's record, select the **NSA (Agreement ID)** link. Click the edit pencil icon opposite the most recent NSA date (if there is more than one). This is a very long form and will take a few seconds to load, depending upon the speed and size of the computer you are using. In the upper right is a field labeled **View Layout**. Click the down arrow on this field and select **NSA Signable version (ID)**. The system will remember 'Signable' as your preferred layout unless or until you change it. All of the previously-entered data will be displayed in a format that mimics the state's approved agreement documents. Next to the View Layout is a print icon . Click this icon to print out the completed NSA, ready for signing.

Similarly, a printable copy of the combined UAI is available. From the resident's record, select the **Assisted Living UAI Printable – ID** link. The latest version of the UAI will be displayed, showing all the previously entered data. Use the icon  [Print](#) at the upper right to print out the completed UAI. At the bottom are signature blocks comparable to those on the state's official UAI forms.

Yearly Assessments

Once an initial assessment has been done for a resident, re-assessments are required by the state on a yearly basis or more often if the resident experiences a significant change. A link is provided on the navigation menu in each resident's record that will step you through the UAI and NSA. Click the **UAI/NSA Data Entry – ID** link. Date, fill out and sign each page as you did for the initial assessment. Click the Save button when done. Before starting the assessment, you may review past assessments/agreements by selecting the desired form from the navigation menu, then clicking the edit pencil icon opposite the date you are interested in viewing. Do NOT make changes to past UAI or NSA forms, as this will destroy the historical record of assessments and your facility's compliance with agreements.

Missing UAI/NSA Components

At any time, you may check the status of all UAI and NSA records, by selecting the Missing UAI/NSA Components report. It is located in the Resident Records section of the Resident Database. It lists all residents who have one or more incomplete forms or forms that need to be reassessed within the next 60 days. Edit buttons are provided to take you to the forms for the individuals needing attention.

ADL Reports

Once filled out, the NSA automatically generates a new 'ADL To Do' list and a new 'NSA/ADLs (ID)' form each morning shortly after midnight. Located in the Resident Database, the To Do list contains daily tasks to be completed by Nursing Staff, CNAs, General Staff and Housekeeping, as well as a list of tasks to be completed as needed or as assigned. To record performance of the ADLs, you may access the **ADL To Do** list from the HQ Home page OR the **NSA/ADLs (ID)** link from the resident's record.

NSA/ADLs Form

From the resident's record, select the **NSA/ADLs (ID)** link on the navigation menu. Click the edit icon for today's ADL. Set the View Layout to **ADLs – ID**. The system will remember this as your preferred layout and you will not have to reset it again.

Each ADL section is labeled with a header. In a beige block at the bottom of each section, assessed information from the latest UAI is displayed so it can be referenced as you care for the individual. In the

white area, check the level of assistance that was provided, make any other selections or comments as needed, and click the 'Staff signature' box.

ADL To Do List

This list displays all residents and all of today's ADL items for each one. Clicking on the underlined name of a specific task for a specific person takes you to the spot on that individual's NSA/ADL form where completion of this task is recorded. Enter the appropriate information and click the 'Staff signature' box.

Three exceptions to the above are Vital Signs, Labs and Toileting. These tasks are recorded on forms separate from the NSA/ADL. The links for these items take you to the appropriate form. Be sure that you have selected the **Vital Signs – ID**, the **Lab Work - ID** and the **Toileting ADL – ID** View Layouts for these three forms and that you fill out all necessary fields.

Tasks that have been completed are automatically removed from the To Do list. However, there are special circumstances that control the appearance of tasks. For instance, when the percentage of breakfast eaten has been recorded and signed, Breakfast disappears from the To Do list, but AM Snack appears. When the snack is recorded, Snack disappears, but Lunch appears, and so on through the day. The system provides for seven (7) toiletings per day. Each is numbered sequentially. If an eighth or additional toiletings need to be recorded, Toileting will appear in the As Needed/As Assigned column and can be accessed from there. Vital Signs appears once in the Nurse's or CNA's column and is thereafter available in the As Needed/As Assigned column. Such items as Transportation, Laundry and Prescribed PRN Medications that are not usually 'every day' responsibilities are always listed in the As Needed/As Assigned column.

The To Do lists for Nursing, CNAs, Staff and Housekeeping are also available on the navigation menu for each individual's record.



Step-by-Step in the Idaho UAI and NSA

Initial Assessment

- Select an individual from Active Inquiry on the HQ Home page
- In the navigation menu, click **Move Inquiry to Pending (Initial Nursing Assessment – ID)**
- Fill in all the appropriate fields on each form, clicking the 'Staff signature' checkboxes for each
- Click the Next buttons and finally the Save button

Assessing a Non-Inquiry, New Individual

- On the HQ Home page, click Initial Nursing Assessment
- Fill in all appropriate fields on all forms
- Click the 'Staff signature' box where available
- Click the Next buttons and finally the Save button

Signable NSA

- Select an individual who has a completed NSA from the Pending or Resident database
- Click on the **NSA (Agreement ID)** link in the navigation menu
- Set the View Layout to **NSA Signable version (ID)**
- Click the print icon

Signable UAI

- Select an individual who has a completed UAI from the Pending or Resident database
- Click on the **Assisted Living UAI Printable** link in the navigation menu
- Click the print icon

Yearly Assessment

- Select an individual from Active Residents on the HQ Home page
- In the navigation menu, click **UAI/NSA Data Entry - ID**
- Fill in all the appropriate fields on each form, clicking the 'Staff signature' checkboxes for each
- Click the Next buttons and finally the Save button

ADL Form

- Select an individual from Active Inquiry on the HQ Home page
- In the navigation menu, click the **NSA/ADL (ID)** link
- Click edit icon opposite the most recent date
- Set the View Layout to **ADLs – ID**
- Fill in all the appropriate fields and click the 'Staff signature' checkbox
- Click the Save button

ADL To Do Report

- On the HQ Home page click the **ADL To Do** link
- Select a task for a specific individual and click the link
- Fill in the appropriate fields and click the 'Staff signature' checkbox
- Click the Save button