

### Correlation Grid for Patient Assessment & Plan of Care

	Patient Assessment		Plan of Care
V502 V505 V506	Current health status Lab profile Medication/immunization history		Incorporate into all POC tags
V503 V518	Appropriateness of dialysis prescription Dialysis adequacy	V544	Achieve and sustain dialysis adequacy standard
V504	BP/fluid management needs	V543	Manage BP and volume status
V507	Anemia	V547	Achieve and sustain hemoglobin/hematocrit standard
		V548	Monitor home patient's ESA administration and storage
		V549	Monitor ESA response: BP and iron stores
V508	Renal bone disease/ mineral and bone disorder	V546	Manage mineral metabolism and renal bone disease
V509	Nutritional status	V545	Achieve and sustain effective nutritional status: albumin, body weight, other nutrition indicators
V510 V514	Psychosocial needs Evaluate family/support systems	V552	Achieve & sustain appropriate psychosocial status through counseling/referrals; assess physical & mental functioning at least annually using standardized survey
V511	Access type/maintenance	V550	Monitor/refer for appropriate, timely referrals to achieve and sustain appropriate vascular access type
		V551	Monitor to prevent failure, including symptoms of stenosis
V512	Evaluate for self/home care	V553	Plan for home dialysis or rationale for non-candidacy
V513	Transplantation referral	V554	Plan for transplantation, patient decision if declines, rationale for non-referral
V515	Evaluate current physical activity level & voc/physical rehab	V555	Achieve and sustain patient's desired level of productive activity, including educational needs of pediatric patients, referrals to physical and vocational rehabilitation as appropriate

## Timelines for Patient Assessment/Plan of Care

V Tag	Patient Type	Activity	Timeline
V516	New	Initial comprehensive IDT assessment	<ul style="list-style-type: none"> <li>Conventional HD patient: latter of 30 days or 13 HD treatments</li> <li>PD or HD patient on more frequent treatment schedule: 30 days excluding hospital days</li> </ul>
V557	New	Initial IDT plan of care (all elements)	Within latter of 30 days or 13 HD treatments
V517	New	IDT initial follow up comprehensive reassessment	3 months after initial IDT assessment completed
V516	Transferred in or Transient	When current comprehensive IDT assessment & plan of care is received from transferring facility	<ul style="list-style-type: none"> <li>Initial comprehensive assessment by admitting facility IDT within 3 months of admission</li> <li>Additional 3 month reassessment not required</li> </ul>
V516 V557	Transferred in or Transient	When current comprehensive IDT assessment & plan of care is <b>not</b> received from transferring facility	Consider patient as “new” (see above) if patient remains in the facility >30 days
V519	Stable	Comprehensive IDT reassessment	Annually within 12 months of the most recent reassessment
V520	Unstable	Comprehensive IDT reassessment Note: “Unstable” definition includes but is not limited to: <ul style="list-style-type: none"> <li>Extended or frequent hospitalization (&gt;15 days or &gt;3X/mo)</li> <li>Marked deterioration in health status</li> <li>Significant change in psychosocial needs</li> <li>Concurrent poor nutritional status, unmanaged anemia, &amp; inadequate dialysis</li> </ul>	Comprehensive IDT reassessment each month
V558	All	Plan of care update after <i>any</i> reassessment	<ul style="list-style-type: none"> <li>Implemented within 15 days</li> <li></li> </ul>
V559	All	Monitor as data are available; recognize and address any areas not meeting targets	<ul style="list-style-type: none"> <li>If patient does not meet one or more targets, adjust POC for that aspect as indicated</li> </ul>
V560	All	Seen by physician, APRN or PA	<ul style="list-style-type: none"> <li>Monthly &amp; periodically in-center while on dialysis</li> <li>If seen in office, facility must have system to obtain records from physician’s office</li> </ul>

“New” means new to dialysis or making a change in treatment modality/setting but does not include change of sub-modality, e.g., from CAPD to CCPD or vice versa. Recognize that the change in modality may have been included as part of the plan of care for the most recent assessment/reassessment.,  
 Transient = receiving dialysis at a facility other than his/her usual facility for  $\leq 30$  consecutive days  
 Transferred in = present in admitting dialysis facility >30 consecutive days  
 Transferred out = absent from usual dialysis facility for >30 consecutive days