



UDSMR® QI Credentialing FAQ

This document answers the following frequently asked questions about UDSMR's quality indicator (QI) credentialing process:

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If you have additional questions not answered in this document, call 716-817-7800 and ask for one of our credentialing services representatives, or send e-mail to credentialing@udsmr.org. For clinical and coding inquiries, contact our clinical support department at 716-817-7844 or clinicalsupport@udsmr.org. Be sure to include your name, your facility code, and a brief description of your request in all correspondence.

Answers

1. Who is my facility's primary facility contact? Can we have more than one credentialing contact?


Each facility typically has many contacts in addition to the primary facility contact.

- Your **primary facility contact** is UDSMR's main point of contact for your facility. Any information related to the facility's credentialing process is directed to this person and any credentialing contacts.
- The facility's **software contact** is UDSMR's technical point of contact for your facility. Software and technical bulletins are sent to this individual.
- Your **billing contact** is UDSMR's accounting point of contact for your facility. All billing issues are directed to this individual.
- In addition, each facility can designate a maximum of **four** credentialing contacts: a **primary credentialing contact** and three **additional credentialing contacts**. The primary credentialing contact is usually the education and training contact for the facility. This individual receives all notices regarding your facility's credentialing status, including all expiration reminders. The primary credentialing contact is automatically added to our *ETC News* distribution list, ensuring that the credentialing contact receives all announcements relevant to education and training opportunities available through UDSMR.

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2. How do I update my facility's credentialing contact information?

To update your facility's contact information, follow these simple steps:

1. Log in to the Subscriber Support website or the UDS Central™ website.
2. Click the **Admin** button in the left-hand menu.
3. Click the **Facility Contacts** button to expand the Facility Contacts section.
4. Click the  button to expand the Credentialing Contact Information section.
5. Make the desired changes to your facility's information.
6. Click the **Submit Facility Changes** button at the bottom of the page.

And that's it! Each facility is responsible for keeping its contact information current in the UDS Central™ website, so you should update your information as soon as possible when changes in personnel affect your list of authorized contacts. Note that you cannot make changes to your facility's contact information unless your facility administrator has designated you as a site administrator. For information about your Subscriber Support privileges, contact your facility administrator. The facility administrator can create a new Subscriber Support account or UDS Central™ account for you or change your privileges as needed.

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3. My facility is a new subscriber. What is our deadline to become credentialed?

Each new facility has one year from its contract enrollment date to become credentialed. Once your facility has enrolled as a subscriber with UDSMR, any staff members can start testing immediately, but others can wait to take the test until they have received quality indicator education. Your facility has the entire year to test all staff members responsible for QI code assignment.

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4. How long will my facility's credentialing status last?

Your facility can select its own QI credentialing time frame. You may choose to credential every twelve or twenty-four months. Your facility's credentialing status will expire on your credentialing expiration date, which appears on the credentialing dashboard on the UDS Central™ website. Target your credentialing expiration date as the deadline for completing all tests. Renewal messages are sent to each facility via e-mail six months prior to the facility's expiration date, and UDSMR recommends that you begin training your staff when you receive the renewal message. If you wait until the month before the exam to begin training, you will be doing yourself and your staff a disservice.

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5. When will my credentialing status expire?

UDSMR credentials facilities, not individual clinicians. In effect, we verify that a particular facility's staff *as a whole* is knowledgeable in the QI system and can code patients accurately. The credentialing status for anyone who codes patients at a particular facility expires at the same time based on the *facility's* expiration date. Because of this, a facility should test all its clinicians during the same time frame.

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6. What happens if my facility's credentialing status expires?

Once your facility has selected its credentialing time frame, you should complete your testing prior to your facility's credentialing expiration date. If your facility has not begun testing or has failed to reach an 80% passing rate for each QI section by its expiration date, the time frame before your facility's next credentialing expiration date will be altered.

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7. Can I change the time frame for credentialing once it has been established?

Yes, you can. The Credential Every drop-down field allows you to set the amount of time between QI credentialing periods. To change the number of months between QI credentialing periods, select the desired value from the **Credentialing Every** drop-down field and then click the **Save** button; the software will use this value to determine the expiration date of your facility's next QI credentialing period after you click the Done Testing button.

The default time frame between credentialing periods is twenty-four months. If you would like to credential every twelve months instead, follow these steps:

1. Select **12 Months** from the **Credential Every** drop-down field.
2. Click the **Save** button.

Click the **Done Testing** button after your facility completes its testing. The software will advance the expiration date of your next QI credentialing period by twelve months. Note that changing the value of the Credential Every field will **not** change the expiration date of your facility's current QI credentialing period; it will simply determine your facility's **next** QI credentialing expiration date after you click the Done Testing button. For example, if your credentialing expiration date is October 1, 2021, and in September 2021 you select 12 Months from the Credentialing Every drop-down and then click the Done Testing button, your next credentialing expiration date will be October 1, 2022, and your next testing period will begin on April 1, 2022.

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8. How can I update the credentialing expiration day if my facility has never become credentialed or if my facility is more than one year overdue?

Your facility's primary credentialing contact or an additional credentialing contact at your facility must call 716-817-7800 and ask to speak to a credentialing services representative or must send e-mail to credentialing@udsmr.org. Include your name, your facility code, and a brief description of your request in all correspondence. One of our credentialing services representatives will work with you on setting up your facility's new QI credentialing expiration date.

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9. What percentage of my facility's staff must pass the exam in order for us to be credentialed or to renew our credentialing status?

A facility cannot become credentialed unless each QI section has a pass percentage of 80% or better. Because payment and length of stay will be determined in part by the accuracy of the assigned QI codes for CMGs implemented on or after October 1, 2019, we recommend you aim for a 100% passing rate for your clinicians.

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10. How will I know who has taken the exam and their scores?

You can manage all your facility information on the QI credentialing website. You can track each clinician's name, discipline, pass/fail status, and test score by clicking the **Exams** tab. Upon completing the exam, each clinician will immediately be issued a certificate of completion that can be e-mailed to your facility's credentialing administrator or printed for inclusion in a personnel file. You can reprint those certificates from the Exams module if the certificate is lost.

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11. My facility's passing rate for each QI section is over 80%. Why hasn't the expiration date changed?

In order to complete the testing process and update your facility's expiration date, you must click the **Done Testing** button on the dashboard to create your facility's credentialing certificate. Once the certificate is created, your facility's new credentialing expiration date will appear on your website.

The system bases your passing rate on the examinations recorded on your website, not your actual staffing. As part of the credentialing process, you should test all clinicians who regularly assign QI codes for patient assessments. (See question [13](#).) If you have a passing rate above 80% in each section but have not tested all licensed clinicians, you are not done with the process. Once you have tested all your licensed clinicians and achieved an 80% passing rate in each QI section, you can click the **Done Testing** button to create your facility's credentialing certificate. Your facility's new credentialing expiration date will appear on your website. If you need additional help, contact our technical support department at 716-817-7834 or techsupport@udsmr.org.

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12. Which staff members should I test for credentialing?

UDSMR bases your facility's credentialing status on the number of clinicians at your facility who took the credentialing exam, but your facility can determine which clinicians should be tested on which quality indicator sections. Your facility may decide not to administer the credentialing exam to transient members of your unit, such as agency staff who may see patients no more than once or twice a month. Those employees can take the information-only examination to ensure that they are proficient or demonstrate general knowledge about certain quality indicator sections.

Once all your clinicians have taken the exam once, whether they passed or failed, you can use the passing percentage on the credentialing dashboard to determine whether your facility has reached the 80% passing rate in each QI section.

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13. One of my clinicians took the exam under two different names. What should I do?

The system bases your passing rate on the examinations recorded on your website, not your actual staffing. This is why it is important to combine your clinicians' results so that each clinician is counted only once in the overall number. If a clinician takes two examinations but uses a different name on each exam—for example, one with the clinician's middle initial, and one without—the website counts the exams as if they came from two clinicians instead of one. If you need to combine results, click the **Clinicians** button in the navigation menu, click the ? icon in the top right corner of the page for instructions, and use the Clinician Management module to combine the appropriate records. If you need additional help, contact our technical support department at 716-817-7834 or techsupport@udsmr.org.

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14. My facility is credentialed, but I have new staff members who need to be tested. Will this affect my facility's credentialing status?

All facilities experience staff fluctuations. New clinicians should be tested as soon as you feel that they have been adequately trained; your facility's reported staffing will increase accordingly. This can be done at any time, even outside of the normal six-month testing period for a facility.

Staffing adjustments may cause the passing rate for a section to temporarily fall below 80%. If your facility's passing rate for a section falls below 80%, we expect you to address the issue as soon as possible.

Note that we do not expect a facility to contact us each time a staffing change occurs! We hope that each facility pays close attention to staff education in order to ensure that those who conduct quality indicator assessments with patients have been properly trained. Remember that accurate reports are contingent on accurate codes collected by properly trained clinicians.

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15. Do staff members who come from another facility need to take the exam? How can I find out whether they passed the exam at another facility?

Exam results do not transfer from one facility to another. Because UDSMR credentials facilities rather than individual clinicians, exam results count only for the facility at which the exam was administered when the clinician was tested. Clinicians who transfer to a new facility must be tested at the new facility, whether or not they passed the exam at their previous facility. Clinicians who work at more than one facility should be tested at all subscribing facilities at which they will rate patients.

A clinician's score is the property of the clinician's facility at the time of testing. All facility information is strictly confidential. UDSMR can supply information about a facility **only** to the people listed as contacts for that facility.

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16. What is “information-only testing”?

If you have clinicians on your staff who are not allowed by state practice act to perform assessments or who are not regular members of your staff, but you want to be sure that they are proficient in the rating system, you can

test them for your information only. Categorizing the testing of these staff members as “information only” ensures that their scores will not be considered as part of your overall credentialing effort.

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17. How is an information-only exam corrected?

Clinicians who take information-only exams should be issued key codes designed for this exam and should take their exams just like all your other clinicians. The length of the information-only exam depends on the QI sections selected by your facility. When the exam is completed, the system will provide the clinician with the exam score and a certificate that identifies areas with incorrectly answered questions. UDSMR recommends additional training in these areas.

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18. Does the online testing system include practice questions?

No, it does not. At the present time, there is no plan to include practice exams as part of the online credentialing system. This is an open-book test, and you may utilize any training resources posted on the UDSMR® website, as well as any resources obtained from a UDSMR® presentation, while you take the test.

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19. I’m confused by a particular exam question. Can I contact UDSMR for clarification?

Yes, but we request that you not contact our clinical support team while an exam is still in progress. We cannot collaborate with you on the answers to an active exam, just as you should not collaborate on the exam with anyone in your facility. (See question [21.](#)) After the exam has been completed, you or your facility’s educator can contact our clinical support department at 716-817-7844 or clinicalsupport@udsmr.org for additional clarification. Our clinical specialists can review the actual exam that was taken and walk you through a similar scenario if you or your educator is unsure why a given answer was incorrect, but they cannot provide you with the answer to the exam question and cannot answer any exam questions on incomplete exams. The facility educator should be the first point of contact for a clinician who needs clarification on rating a particular item; our clinical support specialists are here to provide additional support when needed, with a particular emphasis on helping the facility educator do the best possible job.

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20. My clinicians discuss patient ratings on the floor all the time. Why can’t they work together on the exam?

Although it is realistic to expect team discussions to occur during the course of a typical day on the rehabilitation unit, the credentialing exam is designed to assess an **individual’s** ability to correctly code quality indicator items. Staff members can use sections of *The IRF-PAI Manual* specific to the QI items and any other resource during this open-book exam. The test is designed to determine whether errors or inaccurate codes were caused by particular team members, to identify areas of strengths and weakness in coding the individual items, and to assess the skill and competency of the individual clinician, not the team.

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21. Can I print the exam to review questions after the exam is completed?

Clinicians can review the questions they answered incorrectly, but they cannot print a copy of the completed exam. Clinicians can review each question before finishing an exam. Finished exams are graded immediately, and the system presents clinicians with their final scores and the questions that were answered incorrectly. The printable certificate of completion will let the clinicians know which items they missed. We strongly

recommend that clinicians contact their facility educator first for clarification on rating a particular item. The educator and the clinicians are also free to contact our clinical support department at 716-817-7844 or clinicalsupport@udsmr.org for additional clarification. Our clinical support specialists cannot provide the answer to a particular exam question (see question [19](#)), but they can review the exam question that the clinician answered and walk the clinician through a similar scenario.

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22. Several staff members failed the exam. What do I do now?

If your staff is having difficulty passing the exam, the following suggestions might help:

1. Allow at least two weeks between a failed exam and a new exam. Doing so provides the staff member with sufficient time to prepare. The key to success is planning a systematic, ongoing implementation strategy that accounts for the possibility that some of your staff might not pass the exam on the first try.
2. Whether they pass or fail, clinicians should review the items they missed. The certificate of completion includes the items each clinician missed and the final score. You should encourage all your clinicians to review the questions they had difficulty answering.
3. Download the many valuable education and training materials that are available **free** from the Subscriber Support and UDS Central™ websites. Our list of free resources includes the following:
 - IRF-PAI assessments
 - QI FAQs
 - Decision tree for the “activity occurred” QI codes in section GG
 - Decision tree for the “activity not attempted” QI codes in section GG
 - Section B of *The IRF-PAI Manual*
 - Section C of *The IRF-PAI Manual*
 - Section GG of *The IRF-PAI Manual*
 - Section GG of *The IRF-PAI Manual*
 - Section H of *The IRF-PAI Manual*
 - Section I of *The IRF-PAI Manual*
 - Section J of *The IRF-PAI Manual*
 - Section K of *The IRF-PAI Manual*
 - CMS’s quarterly IRF-PAI Q&As
 - IRF Quality Reporting Program Frequently Asked Questions (current as of March 2021)
 - CMS QRP Training: Participant questions and CMS’s answers from the May 2019 and August 2019 trainings (current as of November 2019)
4. If you have questions about how to rate particular items, contact our clinical support department at 716-817-7844 or clinicalsupport@udsmr.org. If you are looking for training tips and hints that may be helpful as you begin developing your ongoing educational plan, contact our credentialing department at 716-817-7800 or credentialing@udsmr.org.

5. Schedule time with each clinician who failed the exam to review the clinician's exam. Use one of the downloaded tools to illustrate the rating process to your clinicians.
6. Retest your clinicians. A clinician who fails the exam should be placed in your next scheduled review session, or you can set up an individualized plan that fits that clinician's need (i.e., return to step 1 and start again, going through the steps until the clinician passes the exam).

If you've gone through these steps more than once and are still having trouble, download one of the many credentialing-oriented resources available online, or schedule an on-site workshop with a trainer from UDSMR. For more information, see question [25](#).

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23. Can a clinician who fails just one exam section retake an exam on that section only?

Yes, a clinician can retake an exam containing only the sections the clinician failed. To set up such an exam, you must create a custom key code for a new test that contains only the sections that need to be retaken. If you need help creating custom key codes, contact our clinical support department at 716-817-7844 or clinicalsupport@udsmr.org.

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24. Is there a way to create a single certification for a clinician who fails and retakes one or more sections of an exam?

If a clinician retakes an exam using the same name the clinician previously tested with, the system will automatically combine the exams, thereby allowing you to print a combined certificate. This certificate, which will automatically be available in the Exams module, will show the best score for each section across all exams for that clinician. If the clinician names do not match between exam attempts, you will need to combine the exams manually before printing a combined certificate. For more information, see question [13](#). If you need help creating key codes or combining clinician exams, contact our clinical support department at 716-817-7844 or clinicalsupport@udsmr.org.

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25. What credentialing-oriented training resources are available to my facility?

Subscribers to all systems will find many helpful training hints, including practice case studies, on the Subscriber Support and UDS Central™ websites. In addition, UDSMR offers ongoing educational webinars and workshops designed to help individuals and facilities understand the QI items and how to accurately assign codes during an assessment. An updated list of educational offerings is available in the Clinical section of the UDS-PROi® software and on UDSMR's public website at www.udsmr.org. (To access the Clinical section of the software, log in to the UDS Central™ website, click the **Clinical** button in the left-hand navigation menu, and then click the **Education and Training Resources** button.)

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26. How can I subscribe to the *ETC News* distribution list?

If you are the primary credentialing contact or an additional credentialing contact at your facility, you're already signed up to receive this newsletter! If you are not assigned as one of these contacts, just send an e-mail to cmdupdates@udsmr.org with your full name, title, and facility code, as well as the e-mail address you would like the newsletters delivered to. We will add your information to the list of communication contacts for your facility, and you will receive all future messages via the listserv.

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27. Are key codes case-sensitive? How can I tell the difference between 0 and O?

Although key codes are not case-sensitive, we have noted some confusion when it comes to the number zero (0) and the letter O. If you find you are having a problem with a key code that includes one of these characters, begin by verifying that you have entered the code accurately. We encourage clinicians to copy and paste their key code into the login screen if they received it by e-mail. This process ensures that all characters are properly entered into the system. Each QI key code will begin with the letters “QI.”

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28. Will each clinician have a different key code?

Yes. Each key code is unique. A key code is particular to an exam, not an individual. Think of it as a key that fits a particular locker: it allows you to access the locker’s contents, but it does not allow you to open other lockers. Because a key code “fits” only one exam, a clinician who needs to take a new exam or who aborts an exam after beginning it will need to obtain a new key code from the facility’s credentialing contact to begin a new exam.

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29. How can I track which key codes I’ve assigned to which clinicians?

When you create key codes, the system generates an individual page for each key code and instructions for your staff on how to access the system in order to take the test. The final page of this file lists all the key codes generated and provides space for you to record the name of the staff member who received each key code.

Your facility is responsible for tracking the clinician who was issued each key code and the date on which the key code was assigned. UDSMR cannot track this information until the user has actually entered the system, provided demographic information, and completed the exam. Therefore, we strongly suggest that you use the final page of the key code packet to track this information.

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30. How many key codes can I create at a time?

You can create fifty key codes at a time for any of the credentialing exams. The key codes are valid for six months after the date they were created. Each facility can create up to five hundred key codes every two years.

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31. How do I create additional key codes?

You can use the credentialing website to create new key codes. Click the **Credentialing** button in the left-hand navigation menu, click the **Key Codes** button, and create the number of codes you need.

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32. How long are key codes valid?

Key codes are valid for six months, but only exams taken within six months of your facility’s credentialing expiration date will count toward your facility’s renewal of its credentialing status. Clinicians can use key codes created prior to the six-month window as long as both of the following are true:

1. The code is not expired when the clinician takes the exam.
2. The clinician uses the code to take an exam within your facility’s six-month testing window.

For example, if your facility’s credentialing expiration date is January 1, 2022, your clinicians must take the exam on or after July 1, 2021, in order for that exam to count toward your facility’s credentialing status. (The

dashboard displays the start date of the six-month window.) A clinician can use a key code created on July 1, 2021, to take an exam on September 30, 2021, which would count toward your facility's credentialing status because the key code is not yet expired and the date is within the six-month window.

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33. What reports can I generate from the credentialing website?

You can generate two types of reports:

1. **Examination reports:** This report includes the clinicians' names, their disciplines, the exam template used, the dates on which they took the exams, the pass/fail status of each exam, the number of correctly answered items in each section and the total number of questions in the section, their final test scores, and their results for each of the individual QI test sections.
2. **Listing of Clinician Mastery Exams Report:** This report lists all clinicians by name, the dates on which they took the exam (including any exams previously taken), their disciplines, their pass/fail statuses, and their scores.

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34. I have clinicians who are not completely comfortable with technology. Can they receive help with their exams?

Clinicians who are uncomfortable with the testing system can ask their facility's educator or IT personnel to help them maneuver through the system. You can also contact our technical support department at 716-817-7800 or techsupport@udsmr.org for help accessing or navigating the system. Although clinicians may receive technical assistance, they may not collaborate on the answers to the exam.

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