

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

<b>V Tag</b>	<b>Patient Assessment (PA)</b>	<b>V Tag</b>	<b>Plan of Care (POC)</b>
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 V548 V549	Achieve and sustain hemoglobin/hematocrit standard Monitor home patient's ESA administration and storage 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 V551	Monitor/refer for appropriate, timely referrals to achieve and sustain appropriate vascular access type 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

Type of Patient	Frequency of Patient Assessment (PA)	Frequency of Plan of Care (POC)
<b>New patient</b> to dialysis or patient with failed transplant who starts dialysis and stays >30 days	<input type="checkbox"/> Full assessment within 30 days/13 HD treatments, whichever is later (V516) <input type="checkbox"/> Full reassessment 3 months after initial (V517); see Stable/Unstable for next reassessment date	<input type="checkbox"/> Initial POC within 30 days/13 HD treatments, whichever is later (V557) <input type="checkbox"/> 15 days after any reassessment (V558)
<b>Transient/transferred patient</b> came <i>without</i> a recent PA/POC and stays >30 days	<input type="checkbox"/> Full assessment within 30 days/13 HD treatments, whichever is later (V516); see Stable/Unstable for next reassessment date	<input type="checkbox"/> POC within 30 days/13 HD treatments, whichever is later (V557)
<b>Transient/transferred patient</b> came <i>with</i> a recent PA/POC and stays >30 days	<input type="checkbox"/> Full reassessment in 3 months (V517); see Stable/Unstable for next reassessment date	<input type="checkbox"/> POC 15 days after any reassessment (V558)
<b>Patient changing modality/setting</b> , e.g., HD ↔ PD, in-center ↔ home	<input type="checkbox"/> Full reassessment within 30 days/13 HD treatments, whichever is later (V516) unless change was addressed in the last (re)assessment; see Stable/Unstable for next reassessment date	<input type="checkbox"/> POC 15 days after any reassessment (V558); if change was addressed in the last POC, only adjustment of this aspect of POC required
<b>Patient changing sub-modality</b> , e.g., one type of home HD to another, CAPD ↔ CCPD	<input type="checkbox"/> Full reassessment not required if sub-modality change was addressed in the last reassessment; see Stable/Unstable for next reassessment date	<input type="checkbox"/> Review and revise the aspect of POC related to the modality in use
<b>Stable patient</b>	<input type="checkbox"/> Full reassessment 12 months after last reassessment (V519)	<input type="checkbox"/> POC 15 days after any reassessment (V558)
<b>Unstable patient</b> <ul style="list-style-type: none"> <li>• Extended (&gt;15 days) or frequent (&gt;3 within a 30-day period) hospitalization(s)</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>	<input type="checkbox"/> Full reassessment monthly (V520)	<input type="checkbox"/> POC 15 days after any reassessment (V558)
<b>All in-center and home dialysis patients</b>	<input type="checkbox"/> Monitor data as available, recognize elements not meeting targets (V502-515)	<input type="checkbox"/> Adjust POC if targets are not met (V559) <input type="checkbox"/> Physician, APRN or PA must see patients monthly; if patient is seen in physician's office, facility must obtain records of office visits (V560)

No PA/POC is required for a patient who is in the facility for less than 30 days (i.e., a transient, transfer, or patient who recovers kidney function)