



## ECS Version 10.1.4.3

<b>Version:</b> 10.1.4.3	<b>Safety Issues:</b> None
<b>Minimum Version Required:</b> 10.1.3.6	<b>Average Expected Down Time:</b> 5-15 Minutes
<b>Pre-Release Date:</b> -	<b>Type:</b> Patch
<b>Official Release Date:</b> 10/15/2020	<b>Support Documentation:</b> What's New 10.1.4.x
<b>Special Instructions:</b> None	

## Improvements



### The following bugs in version 10.1.4.2 have been corrected:

- The following items have been corrected in the MDS:
  - PPS Discharge Assessments being completed for purpose of Medicare Replacement will now consistently open Discharge Performance questions in GG.
  - Users are now able to select option "8" for "unknown" in question J2100.
  - Edit -3967 will only trigger on stand-alone OBRA assessments.
  - The PDPM grouper version located in Z0100B has been updated to 1.0008 per updated CMS grouper released on 10/9. Users should no longer receive any recalculation warnings on their validation reports with assessments created once this update has been applied.
  - When completing an OSA for purpose of 1, 2, 3, or 4; questions A2400B and A2400C will open appropriately.
  - If question B0100 is answered as "No," Sections C-E will no longer automatically sign.
  - Marking GG0170Q1 as "0" will now skip GG0170R2/S2.
  - Z0100 will populate on an OBRA that is combined with a PPS being completed for purpose of Medicare Replacement.
  - ICD-10 PDPM mapping tables have been updated so all diagnosis codes will now have the appropriate PDPM category attached to them.



- If an order has been discontinued, the Electronic Sign (MAR/TAR) will display the cells appropriately and will X out any cells that were not signed. This was corrected in both desktop and mobile.
- Common tasks which are attached to a general report (and therefore run prior to the report loading) will no longer stall if there are no dates set to the report.
- Charge Master – an issue with how headings were displayed in a Charge Master task that has words from multiple topics was resolved.
- Calendar – an issue with printing a calendar where it would cut off and not print the entire period was resolved.
- Receipts/Adjustments screen – if you are on the Receipts/Adjustments screen and click Control and then Cancel, your purpose will remain as was originally selected. Previously, it would change back to Cash Receipts (even if for example, you had originally picked Adjustments).
- UB04 – Date of Birth printing with wrong format has been resolved.
- UB04 – Issue with using Service Date in the auto file naming area have been fixed.
- UB04 – An issue where printing UB04s from the Open button produced duplicate forms has been resolved.
- Manual HIPPS Codes – an error deleting some Manual HIPPS Codes has been resolved.
- 1500 Forms – an issue with data missing on a printed 1500 form has been resolved.

**The following bug in version 10.1.4.1 have been corrected:**

- When a user with restricted Site rights creates a medication order or discontinues an existing one, they will no longer receive an error or access violation. This may have also been an interface error when writing vital signs. Both errors have been corrected.

**The following bugs in version 10.1.3.6 have been corrected:**

- When a cosign task has the option for “Display Multiple Names” selected within the task and a user selects the Names button on the CoSign screen to switch names, the screen will refresh correctly.
- Users will be able to change an MDS assessment type on an assessment that is being changed after a RUGIV assessment has been deleted.
- Users will be able to “Continue” on RUGIV assessments if it is the only assessment type currently in a Held status.
- N2005 will be active on a PPS Discharge assessment being completed for purpose of Medicare Replacement.
- Issues with the dates printing on the HCFA 1500 form (when printing from the Open button) have been resolved.
- An issue with viewing journals was resolved.
- If a Calendar task has Show Demographics and displays HIPPS Codes, the HIPPS Codes will now be displayed. Previously they were missing from the report.
- An issue with printing Financial Forms with form lines has been resolved.
- A date formatting issue was resolved in the PDPM Analyzer.



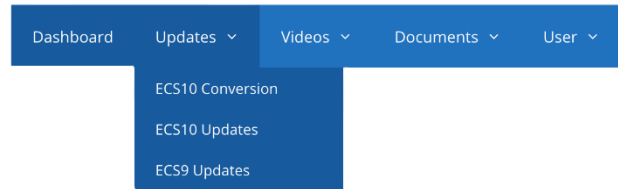
## Accessing The Updates

Updates are available on the Client Sign On portion of our website. [Click Here](#) to access the Client Sign On. On the Client Sign On page, enter the following information and then click Log In.

1. **Username:** Use the username assigned to you by your facility's Administrator, DON, or System Supervisor.

2. **Password:** Enter the password assigned to you by your facility's Administrator, DON, or System Supervisor. If you do not remember your password, click the "Lost your password?" link to update your password.

3. Once logged into the Client Sign On, click on the **Updates** tab. From the dropdown menu, choose the appropriate version of ECS for your facility. Each update will contain the appropriate documentation.



## Install Instructions

1. Download the file. Choose **Save to Disk**.
2. Go to the location where you saved the file.
3. Double-click on the file name. This will start the installation and will open ECS Update and a pre-update checklist.
4. Check the path where the file will be installed. This will start the installation process and guide you through the next steps. For example, if ECS is located at J:\ECS, then you should install to J:\ECS. (Change only if necessary).
5. Verify the update path; this should be set by default with typically no need to change this setting.
6. After clicking **Next**, the update begins its automated process, and no user interaction is necessary unless specified or complete.
7. Click **Finish**.
8. (Optional) Any clients using Citrix or Terminal Services should log on to the console of these servers with users still out of ECS and launch ECS as a network admin. This copies the latest program files applied during the update. Once the login screen appears, other users can log back in to ECS.

## Stay Connected



### Quick Links:

[Client Sign On](#) | [ECS User Forum](#) | [tech@american-data.com](mailto:tech@american-data.com)

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# What's New in ECS 10.1.4

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## Tabs in ECS

The open/active tabs across the top now automatically show the 'X' in the corner to close instead of having to click the tab to activate the 'X.' When an inactive tab is closed, the current active window stays open and the order of the open tabs does not change.

## System Settings

- In the Review tab, we have added a system setting checkbox for **Reverse Chronological**. This option will default all newly opened view screens to be in reverse chronological order rather than topic order. This checkbox will be not affecting the tasks that are saved with a specific sort order in place.
- Removed the warning in System Settings if a user has left the Dashboard path blank. In addition, Dashboard has been renamed to "Report Panel" everywhere in ECS.

## Site Settings

- On the **MDS** tab, in the **Schedule Setup** button, all options for Medicare PPS MDS' have been removed (5-day, 14-day, 30-day, 60-day, and 90-day). They will also no longer appear in the MDS Schedule utilized via Calendar.
- On the **MDS** tab, a checkbox for "Calculate PDPM for OBRA" has been added. This should be checked for any facilities who need to calculate a PDPM HIPPS code on stand-alone OBRA assessments.
- The **PDPM** tab in Site Settings has been adjusted to accommodate for the changes going into effect 10/1/2020. The PDPM tab has now been split into two sections - PPS and OBRA. The original section was renamed to PPS. The OBRA section is brand-new with this update. This tab is used to setup information that is required for correct HIPPS Code write-backs from the MDS, as well as proper rate adjustment days for billing purposes.

## Tasks/Reports

To access this screen, navigate to American Data - ECS > Setup > Security > Tasks/Reports. Once in here the following task types now have the **Last Run** column populating: Calendar, Common Task, Sign Task, and View Task. This is available so a user can more easily clean-up a system by determining the last time those each task has been used. This will only show the last date it was used since you have installed this update.

## Send Property Inquiry

The Send Property Inquiry (accessed via American Data - ECS > Maintenance > Send Property Inquiry) now has an **Export** and a **Print** button.

## User Setup

When in User Setup via American Data - ECS > Setup > Security > Users, if you sort by a specific column and then make changes to one user, the list will no longer refresh. Prior to this change, if you sorted the User list and were trying to make a change on all the CNA users, each time you click OK on a user, it would resort the entire user list back to the default (alphabetically by last name). **Note:** If you make changes to the user's first name, middle

name, or last name, the screen will refresh back to the default sort (alphabetical). Changes to anything else will not trigger a refresh of the user list to occur.

## Electronic Sign

- When the **Highlight Exceptions** option is checked within a task, the user will only be prompted one time before confirming that they would like to switch names/change dates/switch tasks. Prior to this change, a user would receive two messages that they were required to click through to confirm they were wanting to leave cells blank.
- In the Electronic Sign task list, there is a new column titled **Last Run**. This column will show the most recent date that each task has been loaded so that facilities may easily determine if there are tasks that can be removed or hidden. This will only show the last date it was used since you have installed this update.
- A new report type has been added to the Electronic Sign > Reports that is titled **Drug Count**. This report will count the total number of doses that were signed out for whichever period is selected. It will display two columns, one for *Doses Administered* and one for *Doses Held/Declined*. For example, this report can be used to more easily track the number of times a resident received oxygen for billing purposes or to more closely monitor whether PRN psychotropic medications are needed on a resident's record or not. This type of Electronic Sign report may be saved within a report task so it can be linked to an easy button.

### To save this as a task:

1. Click the Toolbar and onto the **Sign** icon or load a MAR/TAR task via an easy access button.
2. Click the **Tasks** button.
3. Select a Meds All/Tx or Meds (Summary) task to complete a Save As on. Highlight the task and select **Save As**. Rename the task as needed and select Site/Service(s) and User Groups.
4. Highlight the new task and select **Edit**.
5. Place a checkmark in **Report Only** and place the radio button in **Drug Count**.
6. On Concealed, remove any numbers besides the "1" so that no extra side effects show up.
7. Click **OK** to save the changes.

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- Users are now able to multi-select in the Electronic Sign screen utilizing a newly added button. Prior to this change, users may have had problems using the **Ctrl** key on their keyboard dependent on how users connect to ECS.

### To use this:

1. Load the MAR/TAR task, as well as the specific date range (if needed).

2. Click onto the **Sign...** button and select **Multi**. Notice that only the options for Hold, Decline, and Sign Out will now be available to select from.
3. Select the option needed.
4. Click all cells which need to be signed out.
5. Click the original button (which started out as saying Sign..., but now lists whichever selected option you chose).
6. Click **Multi** again.
7. The user will now be flipped to the necessary charting topic (e.g., Medication Exceptions).

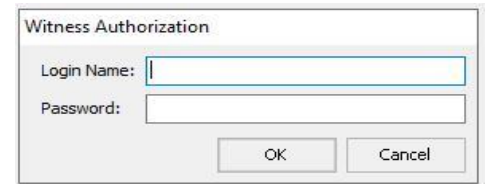
- 
- Users may now have a witness co-sign the administration of a physician order directly on the MAR/TAR without needing to log out of ECS for the witness to log themselves in. This option is called **Witness** in the Word Properties setups. **Example situations:** some injection orders or narcotic medications require that a nurse plus a witness sign out the administration of the medication. Prior to this change, a user would be logged into ECS and would have the eMAR loaded. User 1 would sign into their cell on the eMAR. User 2 would then need to log out User 1 on that device to log themselves in and sign out in the Cosign cell on the eMAR. Or User 2 may have just been logged in on a different device and then had to load the eMAR for resident's that are not in their list today. This new feature allows User 1 and 2 to sign out within the same eMAR logged in only as one user.

#### Setup instructions:

1. Click on the **Toolbar > Setup** icon.
2. Navigate to the topic in which you would like to give users a Co-Sign Witness option. This may be in Physician Orders > Medications or can be utilized in any other Physician Orders topic that flows onto the eMAR/eTAR.
3. Once within the topic where the Witness feature is needed, locate the words under the Other columns that are titled with Co-Sign. **NOTE:** If you do not have or see any Co-Sign words within a topic you would like this setup in, please contact American Data's clinical support team for assistance in getting those words added.
4. Double click into a Co-Sign word and navigate to the **Sign** tab.
5. Place a checkmark in **Witness**.
6. Click **OK** to save changes.
7. Repeat the above steps with each Co-Sign word in the screen.

**To use this:**

1. Once the eMAR/eTAR has been loaded, user 1 can sign out in the hour cell as they usually would.
2. User 2 can click into the Co-Sign cell for the current date.
3. This user will be presented with a Witness Authorization box where they will enter in their Login Name and Password. Once they click OK, their initials/signature is saved into that cell.



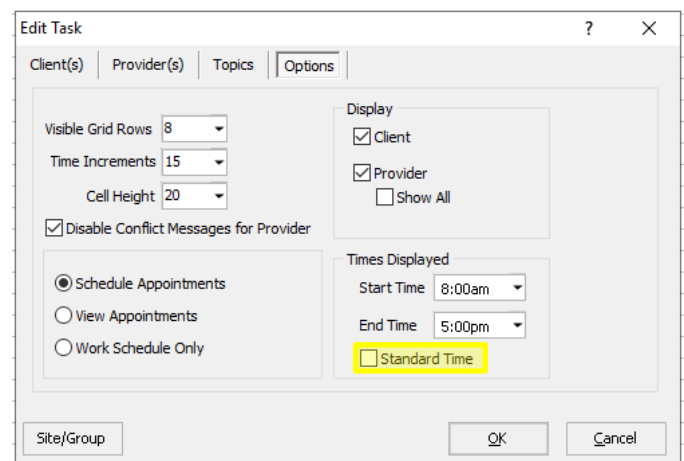
The 'Witness Authorization' dialog box contains two input fields: 'Login Name:' and 'Password:'. Below these fields are two buttons: 'OK' and 'Cancel'.

**Rules:**

1. If a user co-signs a cell by mistake, they will need to login as themselves to remove the co-signature.
2. This can only be used to sign out orders on the day the order is to be given (does not work in conjunction with the Change feature to backdate signatures).
3. This only works with login name/password combinations and will not currently work with fingerprints or magnetic card readers.

## Scheduler

Scheduler Tasks now have the capability to default to a Standard Time rather than Military time. It is common practice for long term care facilities to operate mostly in military time when it comes to the nursing departments. Because of this, a facility will turn on Military Time in their System Settings of ECS so the entire database defaults to this manner. However, this means that everything in ECS defaults that way. There are several instances, such as a transportation or activity schedule, where the user may not want military time.



The 'Edit Task' dialog box has tabs for 'Client(s)', 'Provider(s)', 'Topics', and 'Options'. Under the 'Options' tab, there are several settings: 'Visible Grid Rows' (8), 'Time Increments' (15), 'Cell Height' (20), and a checked box for 'Disable Conflict Messages for Provider'. There are three radio buttons: 'Schedule Appointments' (selected), 'View Appointments', and 'Work Schedule Only'. A 'Display' section has checked boxes for 'Client' and 'Provider', and an unchecked box for 'Show All'. A 'Times Displayed' section has 'Start Time' (8:00am) and 'End Time' (5:00pm) dropdowns, and a highlighted 'Standard Time' checkbox. At the bottom, there is a 'Site/Group' field and 'OK' and 'Cancel' buttons.

## MDS Specific Items

### MDS Form

- Question I0020B will now be over-written if a user selects a new diagnosis code from the View screen and selects Send.
- Users are no longer able to start a Correction assessment on an MDS that is in a status of "Held." As a "Held" assessment should not be sent to CMS, there is no reason to complete corrections on them.
- Section S for the state of Maine has been adjusted to remove the 16 questions that are no longer active on the form as of 10/1/2020. Users will see this on any forms that are started with a target date of 10/1/2020 or later.



- A “^” button will appear to the right-hand side of questions A2400B/C on an OSA assessment being completed for purpose of “Other Payment.” This will allow a user to skip these questions.
- If a user answers question B0100 as 1 (yes), sections C-F will automatically sign (as there are no questions open to be completed in any of those sections if a resident is comatose).
- The **MDS Selection Screen** has a new column for **Manual OBRA PDPM HIPPS** which displays any PDPM HIPPS code generated via the Manual HIPPS Modification tool.

## MDS Questions

In **American Data – ECS > Setup > MDS 3.0 > Questions**, users will no longer be able to adjust the Input tab on the following questions: A0100A, A0110B, A0100C, A0500B, A0500C, A0600A, A0700, A0800, A1300A. These questions are all hard coded to populate from other areas of ECS so do not require any manual setup from the user.

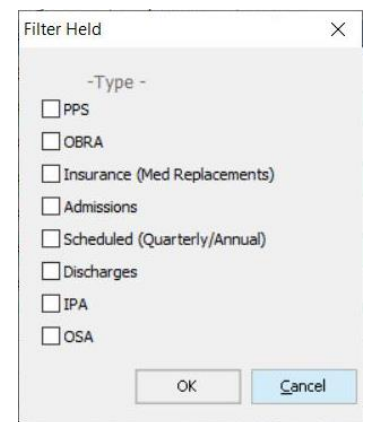
## MDS 3.0 Report

The MDS 3.0 Report now has a new field type that can be populated into the report. This field type is called **\*NTA Points** and sits towards the top of the list as it is a frequently requested item. This can be added to any existing MDS 3.0 Report tasks or can be used on the fly when running the report.

Name	*AssessName	*NTA Points
Adams, John	Not OBRA - 5 day	2
Adams, Suzanne C	Admission - 5 day	2
Anthony, Susan B.	Admission - Not PPS - 5 day	0
Edwards, Jack C	Quarterly 180 - 5 day	13
Edwards, Mary J	Not OBRA - Not PPS - 5 day	4
Einstein, Albert	Not OBRA - 5 day	7
Jefferson, Thomas	Not OBRA - 5 day	6
Smith, Carmen	Not OBRA - Not PPS (5 day)	0
Spears, Britney	Not OBRA - Not PPS - 5 day	3
Zeik, Sharon B	Admission - Not PPS - 5 day	4
		4.1(average)
23 Clients Selected		

## MDS Manager

- Each panel within the MDS Manager now has an **Export** button allowing the section to be easily exported to Excel.
- Options for filtering different MDS assessment types have been added to both the Held and Transmit Panels. This allows for filtering by the following types of MDS assessments: PPS, OBRA, Insurance (Med Replacement), Admissions, Scheduled (Quarterly/Annual), Discharges, IPA, and OSA. Within the Manager, select **Filter**, and then place a checkbox in the option(s) you would like to narrow the resident names by.



## MDS Analytics

To access MDS Analytics, navigate to **American Data – ECS > View > Report > MDS Analytics** or utilize an easy button.

- A new report option titled **Diagnosis Totals** has been added to MDS Analytics. The Diagnosis Totals option will display a total number of resident’s that have each diagnosis documented within their MDS. It looks at the most recent MDS that has question I0020B and/or I8000 open and totals how many residents have that specific code. This report is based solely on the MDS and does not look at charting.

- A new report option titled **Medicare Days** has been added to MDS Analytics. This report will display each resident’s total number of Medicare Days used, as well as how many days are remaining. This report is based solely on the MDS and does not look at charting.

Zeik, Sharon B Medicare Start: 01/17/2020					
Date	04/15/2020	04/16/2020	04/17/2020	04/18/2020	04/19/2020
Medicare Days	90	91	92	93	94
Medicare Days Left	11	10	9	8	7

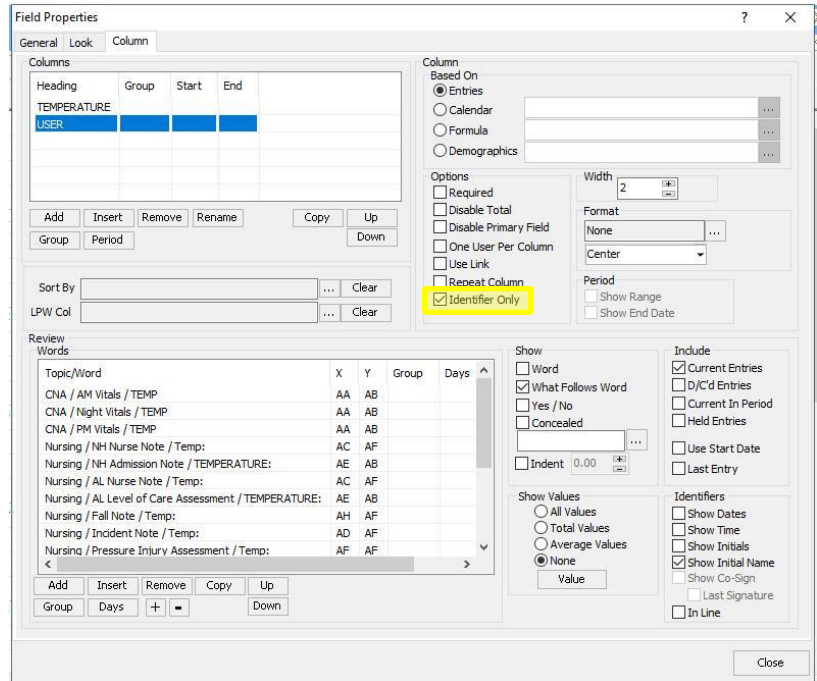
Date	04/20/2020	04/21/2020	04/22/2020
Medicare Days	95	96	97
Medicare Days Left	6	5	4

Test 2, Delphi Medicare Start: 04/20/2020			
Date	04/20/2020	04/21/2020	04/22/2020
Medicare Days	1	2	3
Medicare Days Left	100	99	98

## Reports

- Common tasks which are attached to a report will now follow any date specifications when viewing the report. For example, a user may have a specific report, which also forces the user to select a date range when running it. Prior to this change, if a common task were attached to this report, the common task itself would not look at the date range selected when viewing the report. With this enhancement, both the attached common task and the report will honor the dates selected when viewing the report.
- In the setup of a **Report Task**, there is now an option available on the **Other** tab for **By Client**. This can now be saved within a report task if the user would like the report to default with By Client checked.

- Users are now able to display only the Identifiers (Initials, Initial Name, Date, Time) within a column in a Column Field (red) or View field (green). Prior to this change, users would have to set a value (such as a \* or -) in a word to accurately pull in the identifier data. The user would then pull in the value (the symbol added to the word) in addition to the identifier they were interested in seeing in the report. This new feature (**Identifier Only**) allows only the identifier of choice to display without extra setups needed to the word itself. **Note:** to use this option, you must also have a word in *Review Words*, something checked under *Show* as well as something checked under *Include*. Although only the identifier itself will display in the field, you still must tell the system which word it should pull the identifiers from. In a column field, it is typically easiest to copy an existing column that is setup with the data you need.



Once the column is pasted and renamed, you can place a checkmark in **Identifier Only** and then specify the Identifier(s) which should display.

## Word Setup

- When using **Insert Column**, **Insert Row**, **Remove Column**, or **Remove Row** within the setup of a topic, the user is no longer jumped to the beginning of the screen. Instead, they will remain in the general area of the newly inserted/removed column or row.
- Users now have the capability to multi-select Name List options within an Action > Action Details screen. You may utilize this if a user (such as an Infection Preventionist) needs reports to run on both Providers and Clients. The easy button may be setup to prompt the user for both of those name lists to avoid the task of needing to complete any extra filtering.

## Delete Obsolete Record

Delete Obsolete Record has been available within ECS, however was just recently enhanced. This allows a facility to completely remove a record that have had absolutely no charting in 10+ years. This will clean up the facility's database so as not to have as many names listed in Inactive or Closed Account.

### To Use This

1. Navigate via American Data - ECS > Maintenance > Delete Obsolete Record.
2. Click onto the **Name(s)** button to select name(s) for the system to search through.
  - a. In a multi-site database, we highly recommend only selecting name(s) in one filter/site at a time so as not to slow the system down. For example, the first search would be all names in Site 1 with a status of Inactive. The second search would be all names in Site 1 with a status of Closed Account. The third could be Site 2 names with a status of Inactive, and so on.
3. Once the Name(s) are selected, click **Go**.
4. The system will now search through the selected name(s) to see if any of the records qualify to be deleted.
5. Once finished, the screen will display all Name(s) that qualify to be deleted. It will display the Record Name, Type (Client, Provider, or Vendor), ID Number (this is the number that ECS auto generates and is not the same as the MRN), and the date of the last entry. Last Entry will be blank if there were no entries at all on that record.
6. Select the record(s) you would like to delete.
7. Click **Delete**. As this is permanent and there is absolutely no way to reverse it, the system will ask for authentication before performing the delete. You must confirm by placing a check in the checkbox that you would like to proceed with this action.
8. Notice the selected name(s) will disappear from this screen as they are being deleted.
9. Click **Close** or click onto the "X" to exit the screen.

### Rules

1. There must be at least 7 entries charted in ECS in the past day for this to work. This is to ensure that ECS is being actively used.
2. When searching for name(s) that qualify, it displays all name(s) that have not had an entry or discontinued entry in the past 10 years, it then checks if the name has had a scheduled appointment via the scheduler in the past 10 years. Next it checks for any Electronic Signature signatures in the 10 years. Finally, it checks to see if anything has been archived in the past 10 years. If everything "passes" the checks, it will display the name(s) in the list.
3. If no names qualify for the above, once the progress bar is completed, nothing will display within the Delete Obsolete Record screen.
4. This feature may also be utilized on Providers and Vendors.
5. If you have not had ECS for at least 10 years, then this feature will not work as no names would qualify.
6. If you click Go on this screen without selecting any names, the system will automatically search all record(s) in the entire system. We do not recommend clicking this at a multi-site facility, but rather recommend that you select name(s) first.

## OBRA PDPM Analyzer

A new PDPM Analyzer option has been added which will populate only OBRA assessments. This new option is accessed via **American Data - ECS > View > OBRA PDPM Analyzer**. This analyzer functions very similar to the PPS PDPM Analyzer, except for a few minor differences. Those differences are:

- Only OBRA MDS assessments will populate into this analyzer. This includes any assessment where A0310A = 01, 02, 03, 04, 05, or 06 and may be combined with a PPS assessment.
- The OBRA assessment needs to have a PDPM HIPPS Code calculated in Z0100. This means that any combination assessments completed prior to 10/1/2020 will begin populating into this analyzer as they are an OBRA and have Z0100 populated.
- Stand-alone OBRA assessments will not begin to populate into the analyzer until they have a calculated Z0100 PDPM HIPPS Code, which will not be possible until 10/1/2020 or later.
- The **Start Date** column will be based on the Entry Date (A1600) if A0310A = 01 or will be based on the Assessment Reference Date (A2300) if A0310A = 02, 03, 04, 05, or 06.
- The following features are not included on the OBRA PDPM Analyzer:
  - MDS Type (All, Medicare, Medicare Replacement).
  - Variable Per Diem radio button.
  - Adjusted values, adjusted rates, or average rates.
- Because a resident's OBRA stay may be much longer than 100 days, this analyzer will default the "Start Date" to be the 1<sup>st</sup> of the prior month it is loaded in. For example, if I load the analyzer on 9/9/2020, the Start Date will populate 8/1/2020. Click onto the Start Date field to adjust this date.
- The resident's "stay" in between each assessment will max out at 125 days. There should be at least a quarterly assessment completed every 92 days, so this should never go out to the maximum allotted days, however it is hard coded to stop the stay in case a user forgets to complete a required assessment.

## HIPPS Code Modification

New options have been added to the HIPPS Code Modification screen to accommodate for stand-alone OBRA assessments that may require a manual code be written.

- There is a new drop down called HIPPS Code to Modify. The options for PPS, OBRA, and PPS and OBRA will auto-populate if the user is attaching a new code to an existing MDS assessment. If a user is changing one or the HIPPS Code for one but not both assessment types, the pick list may be changed. For example, if there is an assessment that calculated both an OBRA and PPS HIPPS, but you are changing the PPS for billing purposes only, you may change the HIPPS Code to Modify to say PPS. This drop down will be available for the user to select if they are not attaching a new code to a specific MDS assessment.

- The Assessment Type dropdown will gray out and not allow for any manual selection if the OBRA radio button is selected.
- The key for “6 – OBRA Assessment” has been removed from the Modifiers Legend for the time being, as CMS has stated it is not being utilized for that at this time.

## Calendar

- In the Calendar task list, there is a new column titled **Last Run**. This column will show the most recent date that each task was loaded to determine if any tasks may be hidden or deleted. This will only show the last date it was used since you have installed this update.
- The total number of names on the Calendar is now displayed in the Status bar at the bottom of the calendar report.
- There is a new checkbox on the Calendar Control screen that allows you to view the rates for PDPM HIPPS Codes. Previously, if you had a calendar task that was set to show other rates, you also saw PDPM HIPPS Code rates. This allows you the option to see PDPM HIPPS Code rates or days, regardless of what other setups are on place.
- There is a new OBRA PDPM HIPPS Code check box that can be checked to display OBRA PDPM HIPPS Codes. This will automatically check PDPM Modifiers to also display modifiers associated with the OBRA PDPM HIPPS. You may update existing calendar tasks to have this checked if/when your facility is analyzing this information.
- You are now able to edit a Calendar Tasks and remove words from a group, giving them a group of 0, and will not get an error that a Group Name must be filled in. You can leave the Group Name blank associated with the group of 0.
- **Monthly Totals** is a new option that has been added to the Calendar Control screen. When this is checked, and you run a calendar report for multiple months, you will get a total for each month on the right side of the screen. Previously, you just got the grand totals. There is also a new Print option to allow you to print just the Monthly Totals which will be released in the next release (April 2021) to go along with this. Exporting a report with Monthly Totals checked on will export the additional monthly totals at the end of the report.

## Calculating Screen

- The Calculating screen has been enhanced to accommodate the potential of billing based on the OBRA PDPM HIPPS Codes. There is a new function in the calculation that allows us to pull the OBRA PDPM HIPPS Code and rates from the OBRA PDPM Analyzer. If you analyze a calculation that pulls from the OBRA PDPM Analyzer, the OBRA PDPM Analyzer will be displayed (along with the calculation and the calendar.)

## Receipts/Adjustments

- There is change in posting an electronic 835. You are now able to manually edit the Reference prior to processing the 835. This may be useful if your facility posts based on Receipt #. If you do not modify the Reference and click the Process EF button, ECS will continue to populate the Reference with the TRN from the actual 835 file.
- The log that is generated after processing the 835 file has been re-designed so that more data fits on a page. You will now see Unprocessed Payments first, then Denied, and then those that Processed successfully.
- The report that is generated after processing the 835 file can now be exported to excel. Leave the log and return to the Receipts/Adjustments screen. The Process EF button on the toolbar now displays Export EF. Click the **Export EF** button. Select a location to save the log and give it a name. Click **Save**.
- The **Display All** checkbox that is found on the Receipts/Adjustments control screen can now be seen and used on the actual Receipts/Adjustments screen. This allows you to see charges that have been paid/adjusted in full without first having to go to the Control screen.
- There is a new option on the Receipts/Adjustments screen called **Summary**. This option allows you to hide columns on the Receipts/Adjustments screen (like account numbers) that can make the screen easier to understand. It may be useful in printing or exporting this screen to provide to a resident's family or in researching an account. Setup changes are needed on the Receipts/Adjustments control screen for this to work.
- We improved the **Search** box function in this version. Previously, if you entered in search data (like \$12.00) it would find all occurrences of the \$12.00 and as you click the arrow it would move to each occurrence of the \$12.00. Now, it will only display items related to the search criteria, so only those lines with \$12.00 will be displayed. The arrow will still take you to each occurrence, however, you will not see lines that do not have the \$12.00 associated with them.

## Aging

- The file format has been modified when an aging is exported to Excel. We removed the blank line between names to assist with using Filter in Excel.
- You can add the resident's **Date of Birth** to the Aging. This is helpful when using your aging for collections. Now you can potentially see a resident's Medicaid number along with their Date of Birth. You can toggle the Date of Birth on an off via a checkbox on the actual Aging screen as well.

### Setup changes are needed:

1. Click the **Aging** icon on your toolbar.
2. Click **Task**.
3. Select the task that you would like to add the Date of Birth to.

4. Click **Edit**.
5. Click the **More...** button.
6. In the bottom, place a checkmark in the **Show DOB** field.
7. Click **Save**.

## NCCI Edits

- Each quarter, Medicare updates the NCCI Edits tables. We have enhanced the NCCI functionality within the charting area to check for NCCI edits based on the service date of the entry, rather than today's date.
- The UB04 has a setting that generates the appropriate 59 Modifier codes if they are not being imported or being charted by on site therapists. The UB04 programming now checks the NCCI Edits tables based on the dates of service of the claim rather than based on the latest file.
- New NCCI Edit tables have been included in the update with effective dates for 10/01/2020.

## Formulas

- Within formulas, we have added a "Same Day" checkbox to work with Calendar Events. This is useful when you want a column report to display data only if certain events are found on the Calendar on the same day. For example, in Accounts Receivable we might have a Self-Pay Ancillary Charges Documented report that we would like to see only selected ancillary charges when the resident is on Self Pay.

## Charge Master

- **Fixed Field** has been added to Charge Master to assist users with updating rates in situations where the description of the word itself does not include data (like the HCPCS) to assist in updating rates. For example, there are therapy screens where the word itself is a description of the treatment but does not include the actual HCPCS which makes it difficult to update rates based on the HCPCS value of the word. This programming allows you to see the actual word as well as the HCPCS value of the word to assist with updating rates based on HCPCS.

### Setup Instructions for Editing Existing Tasks:

1. Go to American Data-ECS>Setup>Charge Master.
2. Click **Tasks**.
3. Select the task to edit and click **Edit**.
4. On the left side of the screen, where the values are listed, if the HCPCS (or CPT) is not checked, place a checkmark in this row. If it is already checked, skip this, and move to step #3.



5. Right-click on the HCPCS (or CPT) checkbox and select **Fixed Field**.
6. Click **OK**.

#### Setup Instructions for Creating a New Task:

1. Go to American Data-ECS>Setup>Charge Master.
2. Click **Topic**.
3. Click **Add**.
4. Navigate to the desired section (for example, Therapy.)
5. Double-click the desired topic (for example, PT Administered).
6. Select all words to be included in the task by holding **Shift and/or Ctrl** on your keyboard. (If you are in PT Administered, you want to grab all words that refer to the actual treatment/HCPCS/service provided.)
7. Click **OK**.
8. Click **OK** again.
9. Click the **Site** button. Select the **Sites/Services** that will have values for this task and click **OK**. (You may select "All" if the rates are applicable for all sites/services within your database.)
10. Place a check mark in the HCPCS value.
11. Right-click on the HCPCS value check mark and select **Fixed Field**.
12. Place a check mark in any other value that is associated with this word. For example, Medicare (B).
13. Click **Tasks**.
14. Click **Save**.
15. Enter a name for the task and click **OK**.
16. Select the **Sites/Services** that this task is to be saved for and click **OK**.
17. Select the **User Groups** that can access this task and click **OK**.

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- **Setup Order** was added - this allows you to display words in a Charge Master task in the order that you picked them rather than in alphabetical order (which is the default). A good example of this is the PDPM Nursing Components can now be displayed in the order ES2, ES2, ES1, HDE2, etc. rather than in alphabetical order.

#### To Modify your PDPM Nursing Component Charge Master Task:

1. Go to American Data - ECS>Setup>Charge Master.
2. Click **Tasks**.
3. Select the **PDPM Nursing Component** task and click **Edit**.
4. Place a checkmark in the **Setup Order** checkbox in the middle of the screen.
5. Click **OK**.

## Auto-Adjustments

- When doing an auto-adjustment, if you select a posting date and the month prior to the selected posting date is open, you will receive a warning message that the prior month is still open. The message will read “The month prior to the selected Posting Date is not locked. Do you want to continue posting to the selected Posting Date?” Clicking “yes” will post to your selected Posting Date. Clicking “No” will return you to the control screen to allow you to change the Posting Date to a date in the prior month.
- If you select a posting date within a locked period, you are now presented with an error and returned to the control screen. Previously, you got a blank screen and had to start over.

## Financial Forms

- **Moving Text on Financial Forms** - we have created a utility that can be used to move text on the Financial Forms to be used when you have forms that you need to shift the text for but shifting all text with current options does not work. Please contact American Data’s Financial Support Department for information.
- **HCFA 1500 Forms** - The Modifier fields on the HCFA 1500 form have been changed so that modifiers that populate will be shifted to the left if there are blank fields ahead of them.
- **Medicare (B) Review** option within UB04s has been enhanced. Previously, this option warned if there were not 3 Occurrence Codes/Dates on the UB04 but was not specific to the disciplines found on the claim. This option has been enhanced to error if the codes associated with the therapy disciplines that are on the UB04 are not found. For example, if you have OT on the claim the error will be produced if an 11, 17, and 44 are not found.
- **Discipline Specific Processing** - There is an existing processing option, within the UB04 setup options, called Discipline Specific Processing, that has been enhanced. This option should be turned on your Medicare (B) type UB04s to allow the UB04 to process codes in field 31-34 based only on what Therapy disciplines are on the UB04 in field 42.

### Setup Instructions for Setting Up Discipline Specific Processing on the UB04:

1. On the UB04 Toolbar, click the **Setup** button.
2. Go to the **Setup Options** tab and click the **Options** button.
3. Select Yes - Discipline Specific Processing and click OK and Apply/Close.

### Setup Instruction for the word properties that populate field 31-34.

The words that populate codes/dates in field 31-34 for Medicare (B) UB04s need to have an update to values to include which Discipline is related. This is because the Onset Date

(Code 11) is shared by PT, OT, and ST. Editing the values will allow the processing to search for the discipline specific Onset Date.

1. Go to the **Setup** icon on the toolbar.
2. Click the **Therapy tab**.
3. Double-click the **PT Initial Evaluation** topic.
4. Double-click the **PT ONSET DATE: (11)** word.
5. Go to the **Values** tab.
6. Change the **Code** value that shows 11 to be **11PT**.
7. Click **OK**.
8. Double-click the **PT SOC DATE: (29)** word.
9. Go to the **Values** tab.
10. Change the Code value that shows 29 to be **29PT**.
11. Click **OK**.
12. Click the **Therapy** tab again.
13. Double-click the **PT Administered** topic.
14. Double-click one of the **Date of Service** words.
15. Go to the **Values** tab.
16. Change the Code value that shows 35 to be **35PT**.
17. Click **OK**.
18. Repeat this for each Date of Service word on the screen. You may see one associated with PT Evaluations, PT TX Service, and PT TX Treatments.
19. Repeat steps above for the OT Initial Evaluation, and ST Initial Evaluation topics (replacing the Onset Date and Start of Care Date codes.)
20. Repeat steps 12-17 for the OT Administered and ST Administered topics (replacing the appropriate codes. 44 for OT Dates of Service and 45 for ST Dates of Service.

## ECS Mobile

- The desktop version of ECS was enhanced with the following features that have now also been carried over into the ECS mobile environment:
  - Allows for a scheduler task to be set to **Standard Time** vs. the default of Military Time.
  - The First Date cell of a discontinued order remains open if the order is discontinued on the same day it started.
  - The **By Client** option in report tasks is now available.

## New Items Sent in the Update

- A new topic, which will merge into your existing MDS or MDS 3.0 section. This topic is **OBRA PDPM HIPPS Code**.
- An MDS 3.0 Report task which will compare the RUG scores to the PDPM HIPPS code on stand-alone OBRA assessments. This task is **State RUG vs. PDPM HIPPS Code**.

- Six new Charge Master tasks called:
  - OBRA PDPM Non-Case Mix Rate
  - OBRA PDPM NTA Component Rates
  - OBRA PDPM Nursing Component Rates
  - OBRA PDPM OT Component Rates
  - OBRA PDPM PT Component Rates
  - OBRA PDPM SLP Component Rates
- A Calendar task called **OBRA PDPM HIPPS Codes**.

## Contact Information

### Email Addresses

- Signing up for E-mail Lists: [CARES@american-data.com](mailto:CARES@american-data.com)
- Clinical Support: [clinical@american-data.com](mailto:clinical@american-data.com)
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### Phone Number

- General Inquiries/Support: 1-800-464-9942