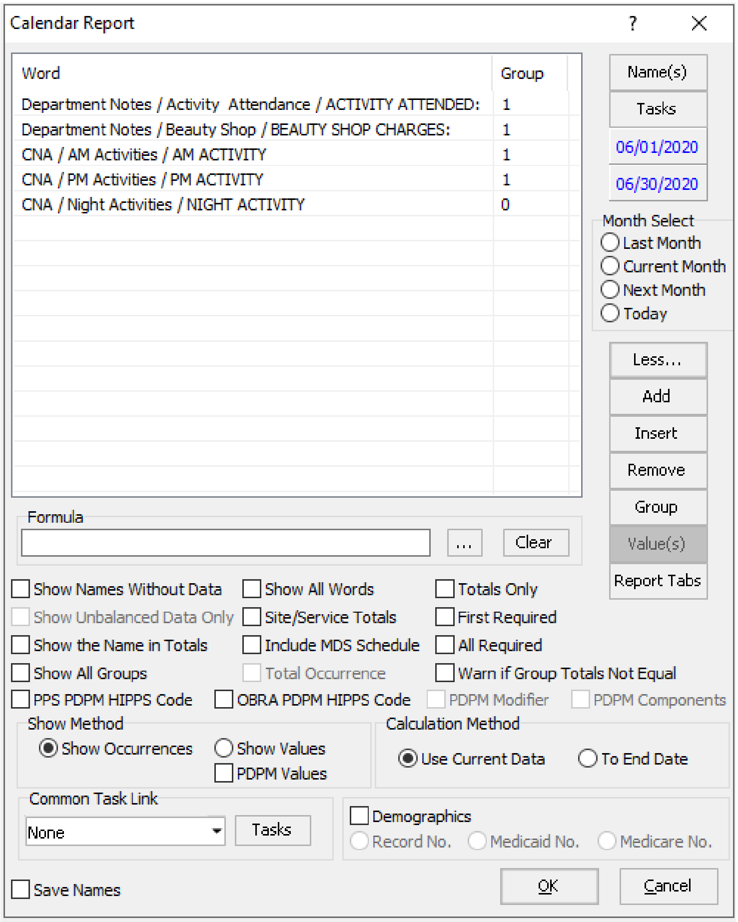
Calendar Tasks

Calendar task are types of reports used to track data based on events or values. For something to appear on the calendar, the words must be setup to have calendar properties.

Create New Calendar Tasks

Task Pulling Occurrences



1. Click onto the **Calendar** icon.
2. Make sure no name is selected and click **OK**.
3. Click **More…** and **Add**.
4. Navigate to the tab which locates the word(s) you would like populated into the calendar task.
5. Select all necessary word(s); use the **Multi** key if needing several words from one topic.
6. Repeat all above steps to add in words from necessary topics.
7. Uncheck **Show Names Without Data** if you only want to see names which do qualify. See *Additional Options Available* later in this handout for details describing all checkmark options available.
8. Click **Tasks**.
9. Click **Save**.
10. Type the name of the task and click **OK**.
11. Select the desired Site(s)/Service(s) and click **OK**.
12. Select the desired user group(s) and click **OK**.
    a. When a site/service/group is selected, only users within that location can view the report.
13. Click **Close** to exit out of the Task setup screen and **Cancel** to close out of the Calendar screen.

Task Pulling Values

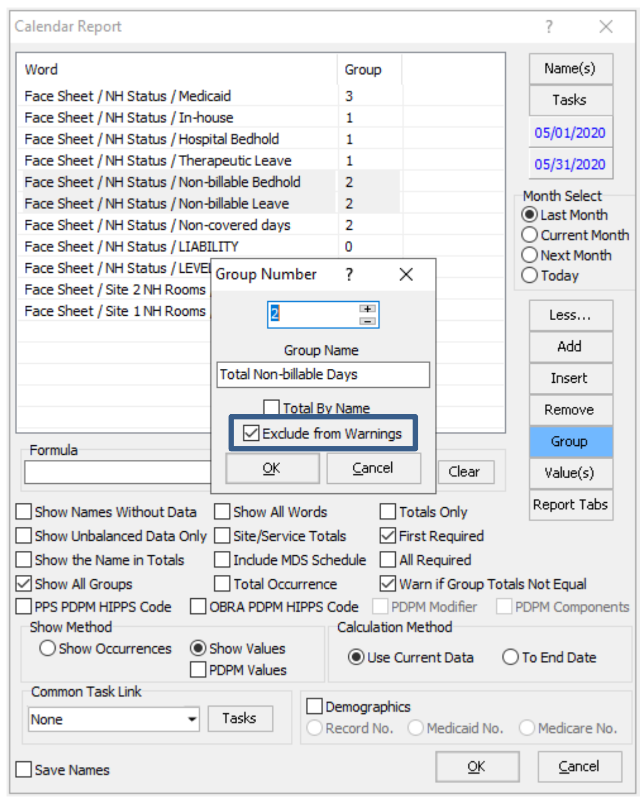
1. Click onto the **Calendar** icon.
2. Make sure no name is selected and click **OK**.

3. Click **More…** and **Add**.
4. Navigate to the tab which locates the word(s) you would like populated into the calendar task.
5. Select all necessary word(s); use the **Multi** key if needing several words from one topic.
6. Repeat all above steps to add in words from necessary topics.
7. Uncheck **Show Names Without Data** if you only want to see names which do qualify. See *Additional Options Available* later in this handout for details describing all checkmark options available.
8. Place a dot in **Show Values**.
9. Highlight all word(s) and select **Value(s)** on the right-hand side. Select which value you would like displayed in the calendar report.
    a. Note: if anything related to dollar amounts is being pulled in, make sure to look at columns AA-AZ and check Consider effective date.
10. Click **OK** and **OK**.
11. Click **Tasks**.
12. Click **Save.**
13. Type the name of the task and click **OK**.
14. Select the desired Site(s)/Service(s) and click **OK**.
15. Select the desired user group(s) and click **OK**.
    a. When a site/service/group is selected, only users within that location can view the report.
16. Click **Close** to exit out of the Task setup screen and **Cancel** to close out of the Calendar screen.

Name	Topic	Event	Totals	1
Adams, John	NH Status	LIABILITY	500.00	**500.00**
Advantage, Medicare	NH Status	LIABILITY	10.00	**10.00**
Ben, Jerry N	NH Status	LIABILITY	525.00	**525.00**
Doe, Jane	NH Status	LIABILITY	727.27	**727.27**
Erickson, Ashley S	NH Status	LIABILITY	550.00	**550.00**

Additional Options Available

- **Show Names Without Data:** When this is checked, all name(s) will appear on the calendar report; even when they have no qualifying data to display in the report. This may be used if wanting to include names that may also have missing documentation from the chart that the user is expecting to be there.
- **Show Unbalanced Data Only:** This is used in conjunction with *Warn if Group Totals Not Equal*, as well as setting up Groups within the word selection screen. This feature will identify any name(s) who are causing the calendar report to be out of balance. This feature may be used most frequently to check



all group totals prior to billing out for each payer source. It may be saved within a task, but then will only show those client's whose group totals do not equal (which may cause the calendar to be completely blank). *Show Unbalanced Data Only* can also be checked "on the fly" while the user is running an existing task where they notice group totals do not equal. Specific groups may be excluded from this setting by selecting a group and placing a checkmark in *Exclude from Warnings*.

- Show the Name in Totals: This option is used to display the names in the Totals area at the bottom of the screen.

Name	Topic	Event	Totals	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Greene, Tina	Site 1 SNF Rooms	101-1	30	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Meier, Lois	Site 1 SNF Rooms	102-1	30	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Morris, Luke J	Site 2 SNF Rooms	106-1	30	x	x	x	x	x	x	x	x	x	x	x	x	x	x
	Site 1 SNF Rooms	103-1	30	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Tubman, Harriett	Site 1 SNF Rooms	101-1	30	x	x	x	x	x	x	x	x	x	x	x	x	x	x
	Site 1 SNF Rooms	102-1	30	x	x	x	x	x	x	x	x	x	x	x	x	x	x
TOTALS:																	
Morris, Luke J	Site 2 SNF Rooms	106-1	30	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Greene, Tina	Site 1 SNF Rooms	101-1	60	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Meier, Lois	Site 1 SNF Rooms	102-1	60	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Morris, Luke J	Site 1 SNF Rooms	103-1	30	1	1	1	1	1	1	1	1	1	1	1	1	1	1
GROUP TOTALS:																	
	Total Rooms		180	6	6	6	6	6	6	6	6	6	6	6	6	6	6

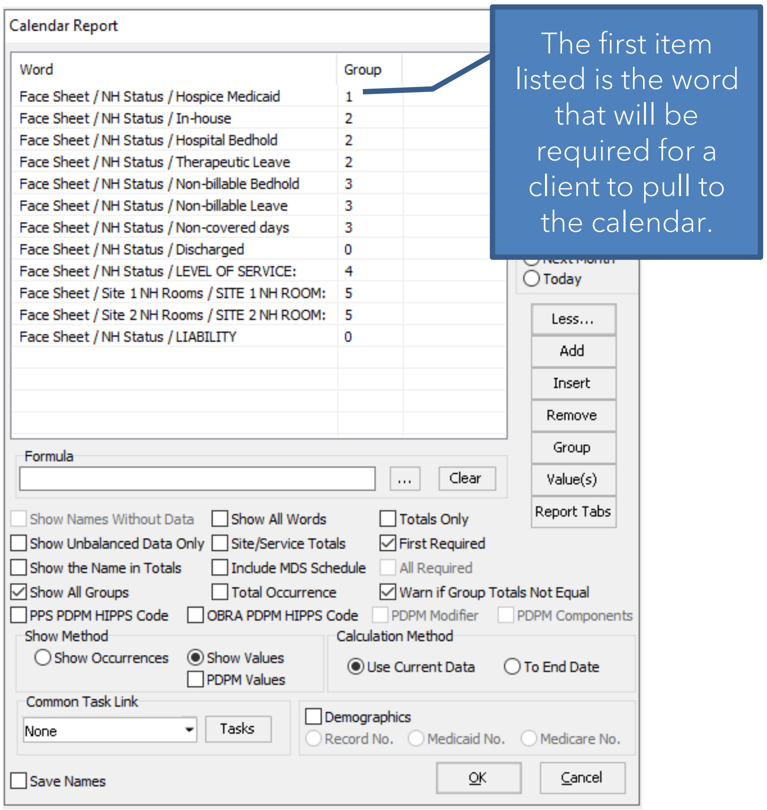
- Show All Groups: With this checked, it will display all groups that have been created within the calendar report. Without this checked; only groups which have some sort of data will display.
- Show All Words: With this checked, all words appear on the calendar for each name, even when the name does not have any qualifying information appearing on the report.
- Site/Service Totals: Select this checkbox if you would like the totals to be divided out by site and service. This may be used to see how many in-house days each site/service has for a specific time frame.

TOTALS:																																	
	NH Status	In-house	780	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26	26
	NH Status	In-house	690	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23
	NH Status	In-house	30	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
	AL Status	In-house -	540	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18	18

- Include MDS Schedule: This feature is being phased out of the calendar and will now be in the MDS Manager.
- Total Occurrence: This is made available only when pulling Values to a calendar report. When this option is checked, the tallies typically found in the totals area are displayed as value totals.
- Totals Only: Specific names will not appear on the report if this is checked. Instead only the totals would appear.
- First Required: With this checked, it will require that a name has the first word listed in the setup pulling into the calednar. If they do not qualify, then the ywill not pull into the calendar at all. This is used frequently in the financial module so that calednars can be setup to only pull names of a certain payer source (rather than all names). This however does not work if there is more than one payer source requirement. For

example if the calednar needs to pull anyone who is Medicare A or Medicare B, then the *Formula* option would have to utilized rather than *First Required*.

- All Required: When this is checked, all words in the calendar task setup must appear on the calendar for the name to appear on the report. This may be used if wanting to see name(s) who are both in-house and Medicare A for example.
- Warn if Group Totals Not Equal: This option will present a warning in the calendar report if there are any mismatched totals to be reconciled. This is used most frequently in the financial module to determine when a calendar is out of balance and therefore the payer source cannot be billed. This may be used in addition to *Show Unbalanced Data Only*.



- Formula: Select a formula to be linked to a calendar task to require that only certain clients who qualify display on the report. For example, if you want to view specific payer source information (such as level of service, HIPPS score, and room number), but only want to view that data on name(s) that are Medicaid or Medicaid Pending, then you may link a formula to the calendar task so only those clients will display.
- PPS PDPM HIPPS Code: This checkbox tells the calendar to display the PPS PDPM HIPPS codes from the MDS on the calendar. Each individual HIPPS code will be dsiplayed and will also automatically generate a group total. These are derived from the MDS and therefore there is no need to have actual words in this task. The checkboxes themselves will control what displays.
- OBRA PDPM HIPPS Code: This checkbox tells the calendar to display the OBRA PDPM HIPPS codes from the MDS on the calendar. Each individual HIPPS code will be dsiplayed and will also automatically generate a group total. These are derived from the MDS and therefore there is no need to have actual words in this task. The checkboxes themselves will control what displays.
- PDPM Modifier: This checkbox will tell the calendar to display the modifier associated with the PDPM HIPPS code derived from the MDS. This will produce its own group total. It should be used in conjunction with the *PPS PDPM HIPPS Code* checkbox and therefore is grayed out until that is checked.
- PDPM Components: This will tell the calendar to display the components associated with the PDPM HIPPS code derived from the MDS. Group Totals will not be presented.

It can only be utilized if the Include *PPS PDPM HIPPS Code* checkbox is also checked. You may choose to *Show Occurrences* or *Show Values* with this option. If you choose Show Values, you will see the adjusted value displayed on the calendar, just like the PDPM Analyzer. The original rate will pull from Site Settings/PDPM tab/PPS Write-back Setups button and use the Variable Per Diem Adjustment Factor.

- Common Task Link: Common tasks may be linked to calendar reports. Click onto Tasks to open the common task selection screen. Select the task on the right-hand column and click <<Add to move it into the available common tasks. Click OK. Use the drop-down to select the new common task.
- Save Names: Placing a checkmark here filters the client selection screen to the names who appear on the calendar report. This may help the user move between different tasks where they would like the same names saved amongst them, so they do not have to re-select names.
- Demographics: You may choose to display Demographic information on the calendar report. Place a checkmark in this checkbox, and select the radio button for Record No., Medicare No., or Medicaid No. to display the data. Each report may only display one piece of demographic information. It will appear to the right of the Name column in the report.

Show Method

- Show Occurrences: Selecting this option allows for the number of occurrences to appear on the calendar. These may appear as numbers (1, 2, 3, etc.) or as an "x."
- Show Values: Selecting this option allows for the values to be pulled into the calendar. This may be useful if wanting to see the specific HCPCS code, dollar amounts, or RUG CMI values.

Calculation Method

- Use Current Data: Uses the calendar word properties that were present at the time the entry was written. If word calendar properties were altered after the word was documented, this change would not be reflected on the report.
- To End Date: Refreshes the calendar by searching the word(s) in the report and updating the word(s) calendar properties. If changes are made to word properties, but do not appear to be reflected on the report, the user will want to select this option to refresh the calendar.

Edit Calendar Tasks

1. Click onto the **Calendar** icon.
2. Make sure no name is selected and click **OK**.
3. Click **Tasks.**
4. Find the task looking to edit, and click onto it, and click **Edit.**
5. Make any necessary adjustments.

6. Click **Save**.
7. Click **Close** to exit the Tasks screen and **Cancel** to close the Calendar screen.

Calendar Task Rights

User Groups

Assure that User Groups have rights to load calendar tasks (this will not give them rights to specific tasks, that will be determined when creating/editing the task or when loading Tasks/Reports Security.

1. Go to American Data-ECS > Setup > Security > User Group.
2. Find the User Group and double click onto it to open the **Properties**.
3. Click the arrow to the left of **Task Security**.
4. Click the arrow to the left of **Calendar**.
5. Click the boxes to the left of the appropriate options in which the user group should have access to.
    a. If the user groups need to access to only load calendar reports, a green checkmark should only be within the Load option, and all others should have a red checkmark.
    b. If the user group needs to also complete setups of calendar tasks, place green checkmarks in all options with which they should have available.

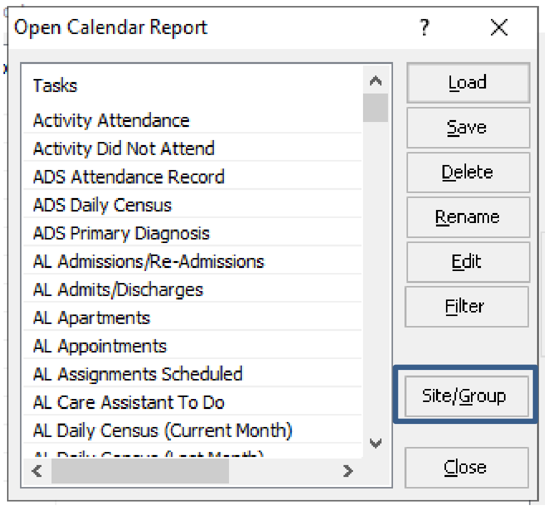
Specific Task Rights via Calendar Icon

When creating a new calendar task or editing an existing one, the user has an option to select which Site/Service and User Groups have access to it.

When creating a task from scratch, upon saving the user will be prompted to select the Site/Service and User Groups.

The user may also choose to edit this later by following the steps below.

1. Click onto the **Calendar** icon.
2. Make sure no name is selected and click **OK**.
3. Click onto **Tasks.**
4. Click onto the task needing to adjust Site/Group on and click onto the **Site/Group** button.
5. Make necessary adjustments to Site/Service or Groups by selecting **Add** or **Remove** options.
6. Click **OK** to save changes.



Specific Task Rights via Calendar Icon

The user may look at calendar tasks a user group has rights via Tasks/Reports. This allows the user to remove several tasks from a user group's rights at one time.

1. Go to American Data – ECS > Setup > Security > Tasks/Reports.
2. In the Types column, click onto Calendar.
    a. If wanting to see all calendar tasks in the entire database, click Display.
    b. If wanting to only see calendar tasks that specific Site/Service or Groups must, click onto those options within the next two selection screens before clicking onto Display.

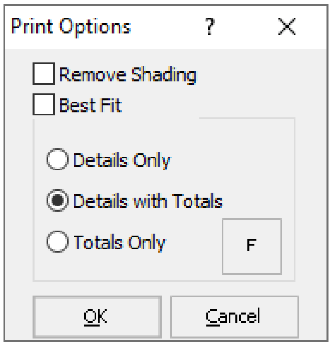
Running a Calendar Report

Calendar reports will most likely be run off of an easy button on an access screen. However, a user may also run a calendar report by clicking onto the Calendar icon and selecting a task.

Once a calendar report is run off an easy button or via the icon, the user may be presented with a control screen which allows them to select a date range.

Buttons on the Calendar Report Screen

- Exit: Click this to close out of the calendar screen.
- Control: Select this button to open the calendar control screen, which allows the user to change names, tasks, display options, and date range.
- Go: Click to refresh the calendar. This may be needed after making changes on the Control screen.
- Export: Click to export the calendar report data. This will create a .csv file. Select a file path and click Save.
- Print: Click to print the calendar report data. The By Name checkbox can be used with the Print button if wanting to print one name per page. The user will also be presented with additional printing options before specifying the printer to send the report to.



- By Name: This button may be used with the Print button. If selected, the report will print one name per page.
- <,>: These are used if the calendar is displaying more than one month's worth of data. Click the right pointing arrow to advance the calendar ahead one month or the left pointing arrow to display the data from the previous month.
- View Reports: If there are reports added under the Reports Tabs in the task setup, and this checkbox is selected; double clicking an item on the calendar will open the reports listed. If no reports are listed, clicking an item will simply open the entry in a View Screen.

- **Show Unbalanced Only:** This checkbox works in conjunction with a checkbox called Warn if Group Totals not equal. Checking this (if it is not already checked by default in the task setup) will change the calendar to only show which names are not in balance with the Group Totals. Therefore, the user would not have to search through all the names to see who is out of balance. This may be toggled on/off to see all names versus only the names that have unbalanced totals.
- **Analyze:** This will show whether there are inappropriate entries in the record, such as duplicate or overlapping entries which may then cause errors in the calendar. This will the user know which sets of data are missing if the group totals do not match, eliminating the need to scroll through all names. Entries will be displayed as "Multiple Occurrences on _/_/_" and/or "Word and an ending word charted on _/_/_" (both a calendar word and an ending word for that calendar word).
- **Legend:** Displays a list of sites with their corresponding icons.