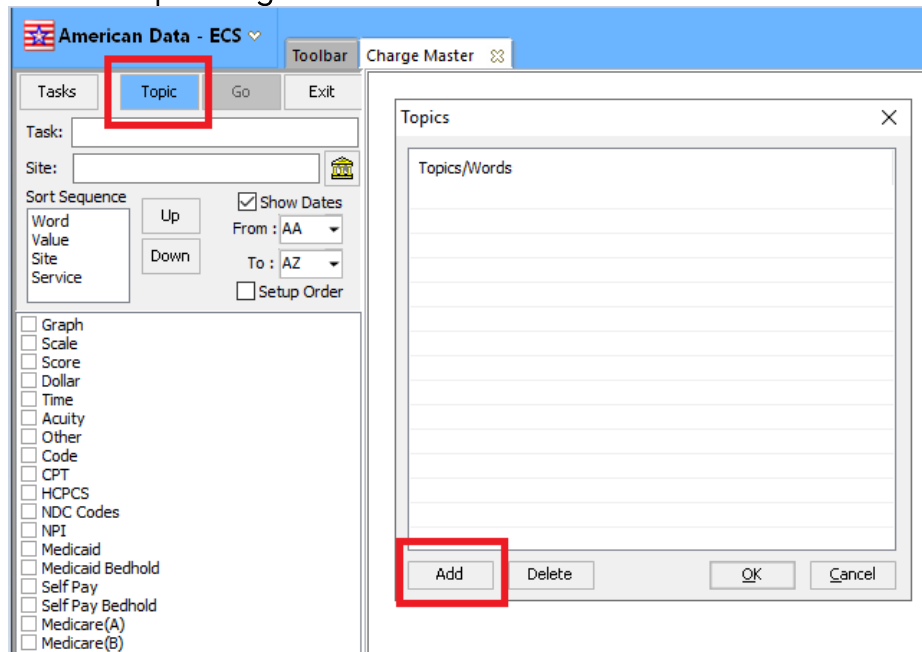


# Charge Master

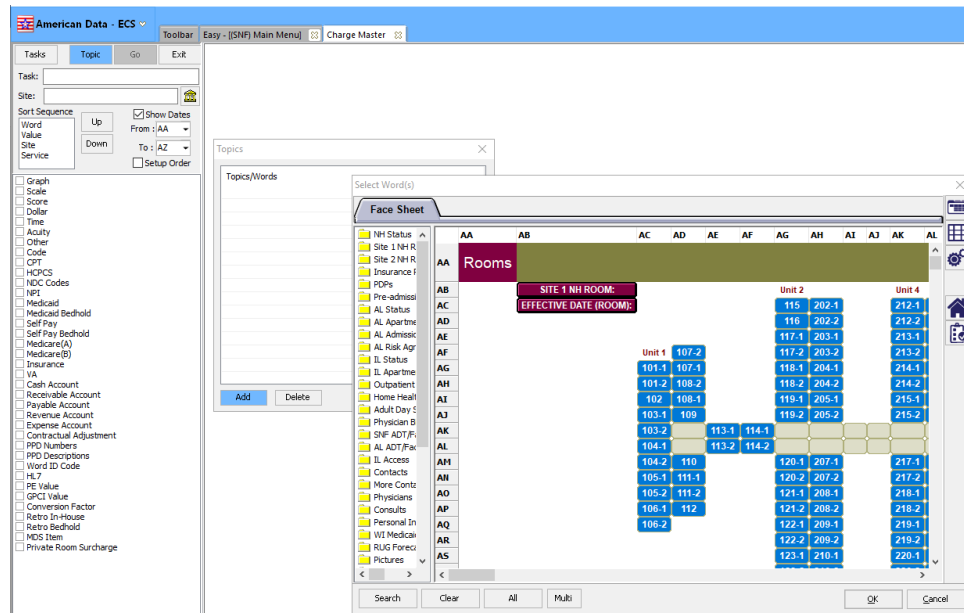
Charge Master is a tool that allows you to update rates. You can set up specific tasks that can be loaded to make it easier to update rates.

## To Create a Task:

1. Go to **File>Setup>Charge Master**.



2. Click the **Topic** button.
3. Click the **Add** button.
4. Select the words that have the values.
  - a. For example, when creating a task for changing values under Rooms, select all words under the heading Rooms found in Face Sheet/Rooms Topic.
5. Navigate to the appropriate tab (for example, the **Face Sheet** tab.)
6. Double-click the appropriate topic (for example, the **Rooms** topic.)
7. Select all of the words that have/should have values in the topic by using the **Shift** and/or **Ctrl** buttons on the keyboard. (For example, all room numbers.)
8. Click **OK**.



9. Click **OK** again. You will be returned to the Charge Master screen.
10. In the top left, click the **Site** button.
11. Select the **Site/Service** you would like to see values for.
12. Click **OK** after selecting the Site.
13. Place checkmarks next to the values you would like to see displayed.
  - a. For example, if you are looking for Medicaid rates for the Room words, place a checkmark next to **Medicaid** and **Medicaid Bedhold**.
14. Click **Go**. The system will display all Medicaid and Medicaid Bedhold values for the Level or Service words.
15. To save this as a task, click the **Task** button.
16. Click **Save**.
17. Enter the **name** for this task. For example: Medicaid Room & Board rates.
18. Click **OK**.
19. Select the **Site** that this task is available to. You may select "All" if you have 1 nursing home in your database. This should align with the Site chosen in the beginning.
20. Select the **User Groups** that will have access to this task.
21. Click **OK**.

The task you saved can be used each year for easily updating your rates. Ideally, you should have a task for each type of rate that needs to be updated linked to an access button on your Rate Changes access screen.

### To use a Task after it has been saved:

1. Go to **File>Setup>Charge Master**. (If you do not have access to this, please contact your ECS System Supervisor to grant you access.)
2. Click the **Task** button.
3. Select the **name** of the task (for example: Medicaid Room & Board Rates.)
4. Click **Load**.
5. Click **Go**.

## To add or update values once you have loaded the task.

1. Click in the next available Value column on the row/word that is applicable.
2. Right-click in the next available **date** column.
3. Select **Pick Date**.
4. Choose the appropriate **effective date**.
5. Click **OK**.
6. Click **Save**.

## To update multiple values and or dates at the same time

Sometimes you need to enter the same value in for multiple words or make all new values effective on the same date. You can do global setups within Charge Master as well.

### Multiple Values

Using Charge Master you may update multiple values. This is the same concept as globally updating rates.

1. Highlight multiple values in a column by clicking on the first one, holding down the **Shift** and/or **Ctrl** key on your keyboard and clicking the last one.
2. Right-click on the highlighted cells.
3. Select **Edit All**.
4. Enter the value into the dialog box and click **OK**.
5. Click **Save**.

This will save the same value for all selected columns.

### Multiple Dates

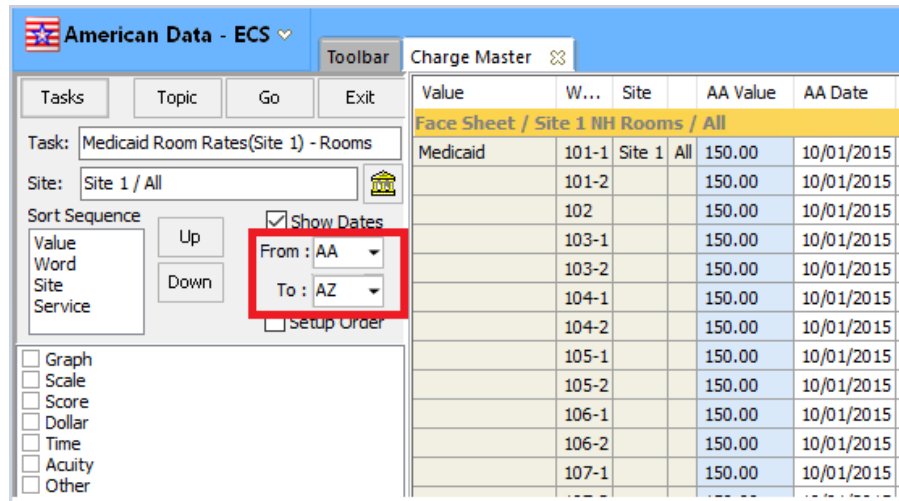
When updating values, you also need to update the effective date associated with the value. Charge Master allows you to globally change the date for all updated values at the same time.

1. Highlight multiple values in a column by clicking on the first one, holding down the **Shift** and/or **Ctrl** key on your keyboard and clicking the last one.
2. Right-click on the highlighted cells.
3. Select **Pick Date**.
4. Choose the appropriate **effective date**.
5. Click **OK**.
6. Click **Save**.

This will save the same date for all selected columns.

### Print a Charge Master Screen

You may print the rates that you see on the screen. It is recommended that you select a range of columns rather than all columns AA-AZ before printing to limit the number of pages.



Value	W...	Site	AA Value	AA Date	
Medicaid	101-1	Site 1	All	150.00	10/01/2015
	101-2			150.00	10/01/2015
	102			150.00	10/01/2015
	103-1			150.00	10/01/2015
	103-2			150.00	10/01/2015
	104-1			150.00	10/01/2015
	104-2			150.00	10/01/2015
	105-1			150.00	10/01/2015
	105-2			150.00	10/01/2015
	106-1			150.00	10/01/2015
	106-2			150.00	10/01/2015
	107-1			150.00	10/01/2015

- While the Charge Master screen is loaded, go to **American Data - ECS>Print**.  
 Click the **Save** button to save this as a PDF. Click the **Printer** button to print the report.
- Prior to printing, note at the top how many pages are set to print to avoid printing too much.

## Miscellaneous Information

- The **Setup Order** check box allows you to display the words in the order that you have selected them rather than the default alphabetical order.
- Changing the **Sort Sequence** allows you to change the order that the words displayed.
- If you save a task, and then later add new words (like new medical supply words or new HCPCS codes for therapy) your task will not automatically have those words in it unless you have used copy/auto-set. If you have not used copy/auto-set, you will need to remember to go in and add these new words/codes to your existing task.
- A blue colored cell means that there is a value in that field. Sometimes you have a blank value, so it displays blue. Blank values can be cleared out in Charge Master only. You must right-click in the cell and choose Clear.
- Double-click the column dividers to re-size columns if needed.
- Back spacing a value does not clear it. You must right-click and choose Clear.
- You can clear multiple values by highlighting them all (using Shift and/or Ctrl) then right-clicking and choosing Clear.
- If you select an entire topic, columns AA-AZ, the columns do not resize because it is just too much to display on the screen.
- You can edit multiple values by holding down Shift and/or Ctrl, selecting multiple values, right-clicking and selecting Edit All.
- You can sort the columns by Word, Value, Site, or Service by clicking in the Sort Sequence and either dragging the column up or down or by using the Up or Down arrows to the right of the box.
- The Setup Order checkbox indicates that the words will be displayed in the order that you selected them when creating the task, rather than alphabetical order (which is default.)