

# Importing Therapy Instructions (Access Screens)

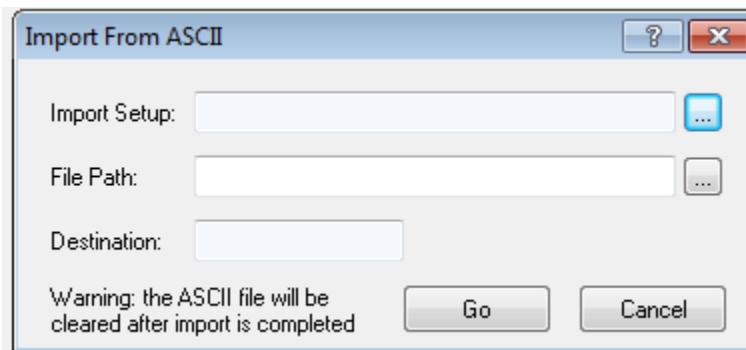
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## Text File

You must receive a file from your therapy company and save it on your network. You will need to know where the text file is saved to run the import process.

## Import From File

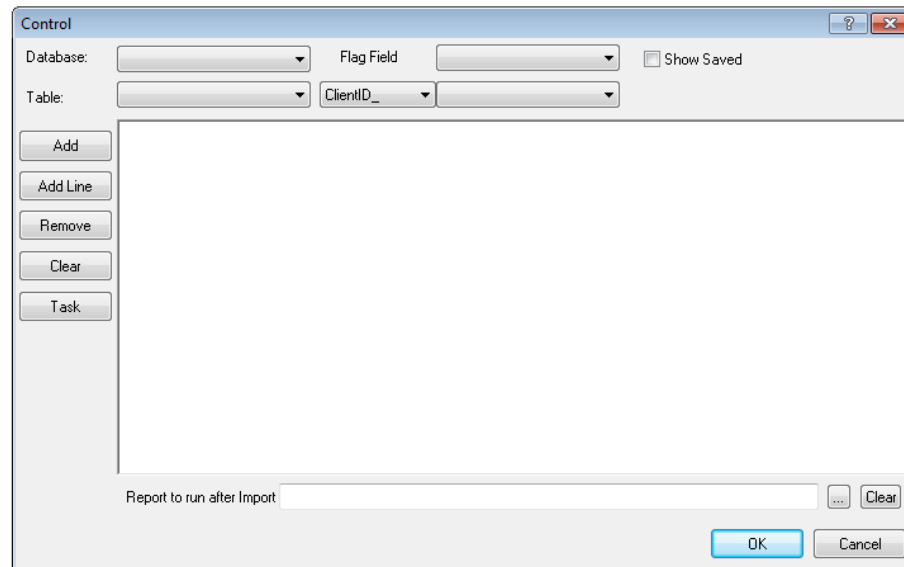
1. From the **Main Menu** click the **Ancillary Charges** button.
2. Click into the **Therapy** button.
3. Under the **Therapy Import** column click the **Import from File** button.



4. Click the ... button to the right of the *Import Setup* field.
5. Select the name of the setup that you will be using and click **OK**. (For example: **Therapy**).
6. Click the ... button to the right of the *File Path* field.
7. Navigate to where the file was saved, click onto the file that you want to import and click **Open**.
8. Click **Go**.
9. Click **Yes** on the warning asking if you are sure you want to Import from the selected file.
10. Click **OK** on the done message. The data has now been imported from the text file to the database.

## Document From Table

1. From the **Main Menu** click the **Ancillary Charges** button.
2. Click the **Therapy** button.
3. Under the **Therapy Import** column click the **Document from Table** button.
4. Click the **Task** button.



5. Select the task called **PT with Modifiers** and click **Load**.
6. Click **OK** on the Document from Table control screen.
7. Click the **Go** button. This should pull all of the data from the database into columns on this screen. It will include all treatments that are in the file, regardless of what task you have loaded. You will see a column for the client identification, the HCPCS, Units, KX & 59 Modifier (if applicable) and a column with the date of service.
8. Click the **Import** button. The system at this point will document all of the Physical Therapy treatment into ECS.
  - a. An entry with an asterisk "\*" next to it on the left means that it was imported correctly. If there is no asterisk this code was not imported. If you have selected the Physical Therapy task for example, all Physical Therapy treatments should have an \* and all Occupational and Speech treatments should not. If all tasks run and there are still lines without an \*, please follow the instructions under the 'Troubleshooting Import Problems' section of this document.
  - b. When this finishes a Log will appear. This log is used to tell you when there are treatments that did not import. At this time, all of the OT and ST codes will appear on the log because you have not yet run those tasks. Please close the log at this time.
9. To run the next task, click the **Control** button.
10. Click the **Task** button.

11. Select the **OT with Modifiers** task and click **Load**.
12. Click **OK** on the Document from Table control screen.
13. Click **Go**.
14. Click **Import**.
  - When this finishes a Log will appear. This log is used to tell you when there are treatments that did not import. At this time, all of the ST codes will still appear on the log because you have not yet run that task. Please close the log at this time.
15. To run the next task, click the **Control** button.
16. Click the **Task** button.
17. Select the **ST with Modifiers** task and click **Load**.
18. Click **OK** on the Document from Table control screen.
19. Click **Go**.
20. Click **Import**.
  - a. When this finishes a Log will appear. This log is used to tell you when there are treatments that did not import. At this time, there should be NOTHING on the log which would indicate that everything imported successfully.
  - b. If you have completed the Import for all tasks (PT, OT, and ST) and there are still lines on this screen, you may want to print the screen to see what has not yet imported. Please see the troubleshooting area for more assistance.
  - c. If there are lines that have not imported, you close the log and click the Go button to refresh the list to display only what has not yet been imported.
21. If the log is blank and all lines have been imported, click **Close** on the log and click **Exit** on the Document From Table screen.

## To View What Was Imported

1. From the **Main Menu**, click the **Ancillary Charges** button.
2. Click the **Therapy** button.
3. Click each of the therapy log reports (**OT Log, PT Log, and ST Log**) to view all of the therapy that was imported. Select the appropriate date range and click **OK** to view the report.
  - a. The first page of the report for each discipline gives a summary of the total number of units imported on each resident. The rest of the pages will give a detailed breakout for each HCPCS documented on each resident.
  - b. This report must balance back to your original text file. To see a total of units in the text file, you may open the text file in Microsoft Excel and total the units column. If the two reports balance click Close to close the report in ECS.

## Troubleshooting Import Problems

If you finish the Document from Table process and there are still lines displaying that would mean that there is an issue with the data in the table. There are different reasons as to why something may not import and they are each described below.

**If at any time you require additional assistance, please contact the financial department at American Data.**

### Previously Imported File

In ECS10, after you have imported the file into ECS, the original file will be renamed. The file will have today's date and the word "IMPORTED" added to the end of it. Once the file is renamed, you will not be able to import that same file a second time. If you try to re-import the same file, you will receive an error that the file was previously imported.

### Check SSN or MRN

1. From the Document from Table screen, note the SSN or MRN that did not import (which means they will not have an \* next to them).
2. Leave the Document from Table screen open and on the top left of your screen click onto the **Easy** tab.
3. Go to the **Main Menu**.
4. Click the **ADT/Face Sheet** button.
5. Click the Add/Update Client button.
6. Click the **Filter** button.
7. Make sure there are checkmarks in Active, Hold, Inactive, and Closed Account.
8. Click the Other Demographics button.
9. Enter the **SSN** or **Record Number** into the appropriate field, depending on what your facility uses to import.
10. Click **OK**.
11. Click **OK** again.

If there is a corresponding name, it means that something else is wrong (such as locate or the HCPCS code). If there is no corresponding name, you will have to notify the therapy company to determine who those services are for. Either their system or ECS has an incorrect SSN or Record Number.

If ECS has the incorrect SSN or Record Number, once you have updated the resident's demographic information, click Import on the Document from Table screen to import the remaining entries.

## Check Locate

1. From the Document from Table screen, note the dates of the service for the resident who did not import correctly.
2. Leave the Document from Table screen open and on the top left of your screen click onto the **Easy** tab.
3. Go to the **Main Menu**.
4. Click the **ADT/Face Sheet** button.
5. Click the Add/Update Client button.
6. Right-click on the name of the resident and select **Locate**.
7. Click the **All History** in the lower left.
  - View the locate history and make sure everything is in order. For example, if the date(s) of service is outside of an Active locate history, the entry (ies) will not import. Or if the resident is active in two location(s) on the date the service was provided, the system will also not be able to determine how to import.
8. Fix any incorrect dates within the locate screen. Make sure to click **Apply** to save any changes that are made.
9. Click **Close/Cancel** when finished viewing the locate statuses.
10. If you did make corrections to the locate status, click **Import** on the Document from Table screen to import the remaining entries.

## Check HCPCS Code

1. Click the **Setup** icon on your toolbar.
2. Click the **Therapy** tab.
3. Double-click the Administered folder that corresponds with the code that you are looking for. For example, if you are looking for code 97016GP you should double click the PT Administered folder.
4. Click the **Search** button on the right hand side of the screen and type in the HCPCS code number (for the example above you would type in 97016) and click Go. If the word shows up in the Search Results screen then there must be something else that is incorrect with that particular resident (SSN, MRN, or Locate).
5. If the code does not appear in the Search Results, please contact your ECS System Supervisor or the financial department at American Data to get the code added in.



## Clearing Out the Table of What Did Not Import

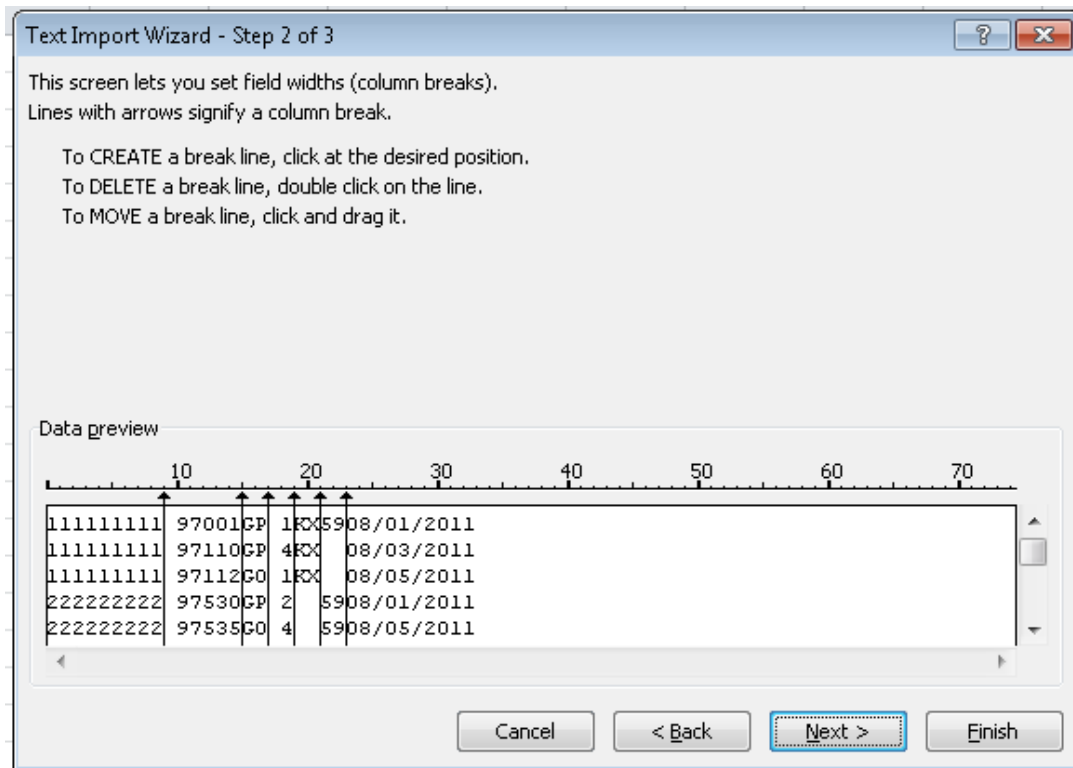
There may be instances where all the therapy treatments did not import and you do not want them to be imported. You may want to clear out the remaining codes that did not import if you manually fixed the entries or if there are items that you do not want to import.

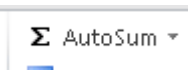
1. From the **Main Menu** click the **Ancillary Charges** button.
2. Click the **Therapy** button.
3. Under the **Therapy Import** column click the **Document from Table** button.
4. Click the **Task** button.
5. Select the discipline that has lines that need to be cleared out (For example: Physical Therapy).
6. Click **Load**.
7. Click **OK** on the Document from Table control screen.
8. Click **Go**.
9. Click the **Select All** button (on the far upper right).
10. Click the **Clear** button (on the far upper right).

## Using Excel to Total Therapy Units

1. From your computer, open **Microsoft Excel**.
2. Go to **File** and choose **Open**.
3. In the bottom right corner, change the drop down from All Excel Files to **All Files**.
4. Locate the import file that includes the charges and click on it.
5. Click **Open**.
6. A Text Import Wizard will appear.
  - a. On the Step 1 of 3 screen:
    - i. Select the **Fixed Width** radial dial.
    - ii. Click **Next >>**.
  - b. On the Step 2 of 3 screen:
    - i. Add/move delimiter lines so each item is in its own column - i.e. SSN/MRN, HCPCS, Discipline modifier, Units, KX/59 modifier, Date (location of the lines will depend on the order and length of each item but here is a rough guide)
      1. Move the first line to 10 as the SSN/MRN should be 10 digits long.
      2. Click on the data preview area to add another line right after the HCPCS and before the Discipline Specific Modifier (GO/GP/GN).
      3. Click on the data preview area to add another line right after the Discipline specific Modifier (GO/GP/GN).

4. Click on the data preview area again right after the # of units column.
5. Click on the data preview area again right after the KX column.
6. Click on the data preview area again right after the 59 column.



- ii. Click Next >>.
- c. On the Step 3 of 3 screen:
  - i. Select **General** in the Column data format area.
  - ii. Click **Finish**.
7. You may need to make the columns bigger to accommodate the length of the text in each column
8. Go to the bottom of the Units Column and click in the first empty field
9. Click the **Auto Sum** button from the Microsoft Excel toolbar. 
10. Click **Enter** on your keyboard to accept the formula Excel has created.
11. Compare the total to the Therapy Units calendar.

If you would like to get a total by discipline, continue with the instruction below.

1. At the top of the worksheet, click on the number **1** on the left side.
2. Right-click your mouse.
3. Choose **Insert**.
4. This will allow you to label each column. (SSN, HCPCS, Discipline Modifier Units, Modifier 1, Modifier 2, and Date).
5. Click on square in the top left side of the spreadsheet, just above the 1 to highlight all columns and rows of data.
6. On the toolbar, click the **Sort** button.
7. In the Sort by, choose **Discipline Modifier**.
8. Sort A to Z to put the file in order of OT, PT, ST.
9. Find the end of the OT codes.
10. Right-click on the number on the left side of the first PT row.
11. Choose **Insert**.
12. Click in the new blank row under the Units column and click on the Auto Sum button on the toolbar. This will auto sum from the top to the new line added, which is the OT Total.
13. Repeat steps 9 thru 12 to get a PT Total and ST Total.
14. Compare each discipline total to the Therapy Units calendar in ECS.

These steps can also be followed for the G-Codes file if you would like to compare the totals to the G-Code calendar.