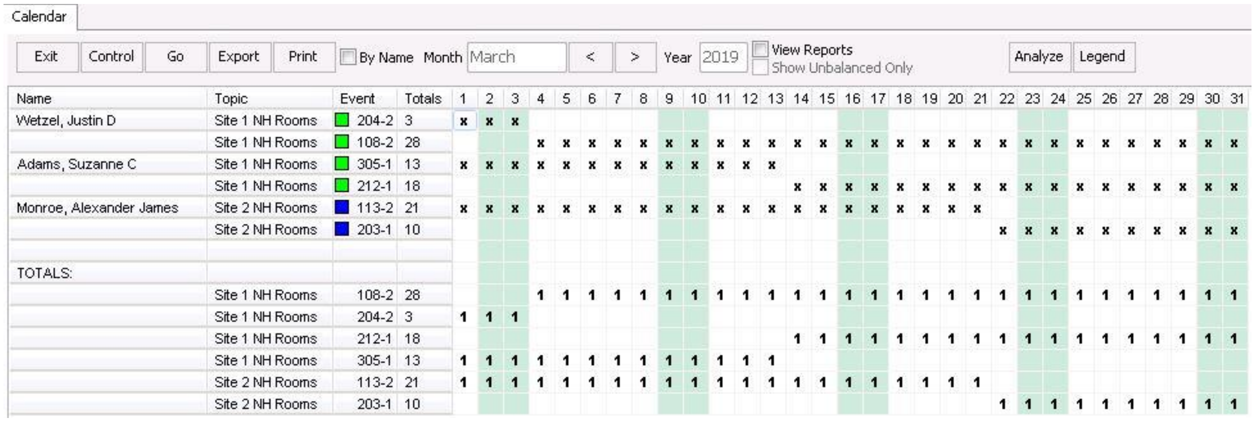
# Calendar Basics

## Calendar

The Calendar tracks events in a way that nothing else in ECS does, and it is one of the most under-utilized functions on the clinical side. Its unique features are:

- It can track information based on the date IN an entry rather than the date OF an entry.
- It is able to track recurring events. This means that it can total an item like patient days by tracking the dates of status changes.
- It is able to display recurring events based on a pattern, such as for a lab schedule.

Examples: Tracking therapy days and minutes
Resident census
Infections/Falls reporting
Obtaining rates for graph reports
Number of patient days of RUG scores
Nursing To-Do list items
CNA/RA assignments (access screens)
Care Plan due dates

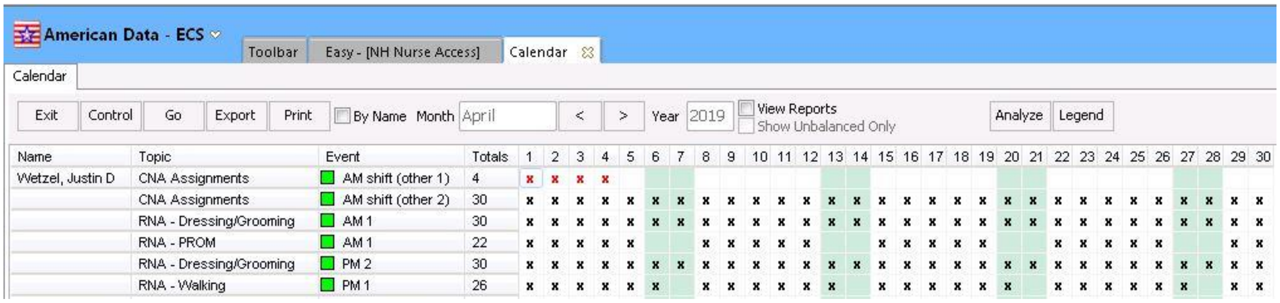



| Name | Topic | Event | Totals | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Wetzel, Justin D | Site 1 NH Rooms | 204-2 | 3 | x | x | x | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Site 1 NH Rooms | 108-2 | 28 | | | | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x |
| Adams, Suzanne C | Site 1 NH Rooms | 305-1 | 13 | x | x | x | x | x | x | x | x | x | x | x | x | x | | | | | | | | | | | | | | | | | | |
| | Site 1 NH Rooms | 212-1 | 18 | | | | | | | | | | | | | | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x |
| Monroe, Alexander James | Site 2 NH Rooms | 113-2 | 21 | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | x | | | | | | | | | | |
| | Site 2 NH Rooms | 203-1 | 10 | | | | | | | | | | | | | | | | | | | | | | x | x | x | x | x | x | x | x | x | x |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TOTALS: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Site 1 NH Rooms | 108-2 | 28 | | | | 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 |
| | Site 1 NH Rooms | 204-2 | 3 | 1 | 1 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Site 1 NH Rooms | 212-1 | 18 | | | | | | | | | | | | | | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| | Site 1 NH Rooms | 305-1 | 13 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | | | | | | | | | | | | | | | | | | |
| | Site 2 NH Rooms | 113-2 | 21 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | | | | | | | | | | |
| | Site 2 NH Rooms | 203-1 | 10 | | | | | | | | | | | | | | | | | | | | | | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |

## Understanding Calendar Reports

- Client names are listed on the left with the selected date range running left to right across the page. Weekends are highlighted. Totals are listed below client details unless details are hidden per the report or Control setup.
- Information may be displayed in three ways:
    - Information for each client and date is displayed as an "x" if the item is considered recurring and occurred on the displayed date(s).
    - Information is displayed as an integer (1, 2, 3…) if the item is considered a single occurrence (like a fall) and represents how many times the event occurred on the displayed date(s).
    - Information is displayed as a value of the displayed word, either the text after the word (the "35" in PT TX Minutes: 35), or a value set up in the word properties (the "97150" in PT TX: Group Therapeutic).

- You may double-click on a client name to display their MDS Selection Screen (the MDS that has been completed for the client in the past).
- You may double-click on any client information on the calendar to display a View screen of the entry which caused the data to appear on the calendar (critical for troubleshooting).
- You can prevent an entry from appearing on the calendar in the future by discontinuing the entry.
- Any item(s) displayed in red represent discontinued entries that already appeared on the calendar prior to the date the entry was discontinued. (Example: CNA assignment setup: An "Other 1" will put an "x" on the calendar every day starting as of the effective date. The entry was discontinued for 04/05/2019, meaning the assignment becomes discontinued as of 12:01am on 04/05, so bear in mind when selecting end dates and discontinue dates, that the day after the assignment ends is the day that needs to be selected. Once an entry is discontinued, all of the "x's" will be displayed in red, and going forward from the discontinue date, "x's" will no longer be displayed.)




- To remove information from the calendar for past days (charting error, event never occurred), the entry typically must be **Archived**. Since some clinical staff don't always have rights to archive entries, however, there is a word property function that can be setup on the Calendar tab called **Remove DC**, which will perform the same function as archiving when the entry is discontinued instead.

## Running Calendar Reports

There are many reports set up in the Calendar tasks list. You may choose a report from the list. You may also use **Add** to create a custom list of calendar words to run a report for which there is not a task. You may want to create new tasks/reports for new calendar words you have created.

## Viewing Calendar Reports

1. Click the **Calendar** icon 

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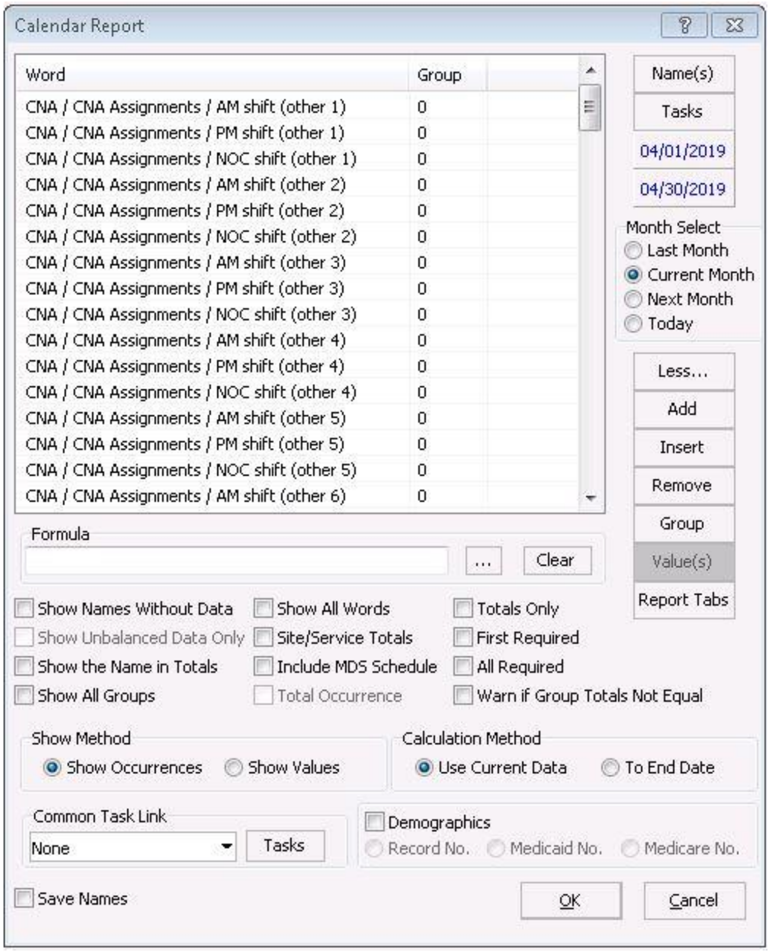
2. Select the desired client(s), and click **OK**.
3. Click **Task**.
4. Select the desired task, and click **Load**.
5. Review/select the appropriate Start Date and End Date, and click **OK**.

6. Click **Print** to print the report.
7. Click **Analyze** to show why information appears as it does on the report. This is useful when something is not appearing as expected.
8. Click **Control** to go back to the calendar report screen to adjust dates, choose a different task, or select different clients.
9. Click **Close** to close the report.

## Key Calendar Control Screen Properties

For a full description of all Calendar Control properties, please refer to your ECS User Manual. When you run a Calendar Task, the Control screen properties are already set to the appropriate choices, although you may change any setting while running the report.




- **Word box**. Lists the calendar words that will be used to display results on the report.
- **Calculation Method.**
- **Use Current Data.** Default setting. Runs the report based on current information about calendar entries.
- **Calculate to End Date**. Primary troubleshooting tool. If the calendar report does not display expected results, select this option and run the report again. Refreshes the calendar by searching for the word(s) in the report and updating the word(s) calendar properties. If a word was assigned Calendar properties *after* entries were made, and you want to display those entries on the calendar, you must select this option the first time.
- **Show Method.**
- **Show Occurrences.** Default setting. Displays the days on which an event occurred. One-time events are displayed as a "1," recurring events are displayed as an "x."
- **Show Values**. Displays a defined value from the Value tab of the word(s) being displayed on the calendar. Used in Conjunction with the **Values** button. This is most often used to display dollar values and HCPCS codes.

- **Group**. Allows you to group multiple words in the Word box into different groups, which causes them to provide subtotals for each group at the bottom of the calendar report (e.g., display all therapy treatments, but group PT, OT, and ST into sub-totals).

## Viewing Calendar Data with No Task

1. Click the **Calendar** icon 

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2. Select the desired client(s), and click **OK**.
3. Click **Add**.
4. Select the desired section.
5. Double-click on the desired topic.
6. Select the desired word(s), and click **OK**. Repeat as needed with additional words.
7. Make the desired selections on the calendar report screen.
8. If you newly added or changed calendar properties for existing words, select the **Calculate to End Date** checkbox.
9. **Show Names without Data**. Determines whether to display clients with no calendar data.
10. **Totals Only**. Determines whether to show only totals, no details.
11. **First Required**. Select this checkbox to show data only for the client if the first word listed has data (useful for Medicare Census – the first word is "Medicare A" primary payer).
12. **Show Method**. Occurrences or Values
13. Highlight the words in the Word box you wish to display values for, and select **Show Values**.
14. Click **Value**.
15. Select the appropriate value, and click **OK**. This may be "Text" to show the test after a word, such as the therapy minutes entered, or a value listed in the Values tab of the word (dollar amount, HCPCS code, etc.).
16. **Date Range**. Select a default range or select a start date and end date.
17. Click **OK**.
18. Click **Control** to go back to the Calendar screen to make adjustments/select different clients.
19. Click **Close**.

## Create a Calendar Task

After you have completed steps 1 – 9 above, you can save your setups as a Task (Report) for future use:

1. From the Calendar Control screen, click **Tasks**.
2. Click **Save**.
3. Name the task, and click **OK**.

4. Select the appropriate facility for the task to be saved.
5. Click **OK**.
6. Select the user groups that may access this Calendar task.
7. Click **OK**.

## Troubleshooting

There are four steps to troubleshooting the calendar:

1. Click **Control,** and select the **Calculate to End Date** checkbox. Click **OK** and then **Yes**.
2. Click **Analyze** for information about the entries on the report.
3. Review the Word Properties of the words on the report to ensure that they are "Calendar" words and have proper setups.
4. Review the client record(s) and check for entries that may have been discontinued when they should have been archived.

## Use of Calendar in other ECS Functions

- Column Reports and Graphs – Can be set to pull data to the report based on what would appear on a calendar report for that information.
- Common Tasks – Can filter clients down based on the information on the calendar.
- View Entries Screen – Now has an option to search the Calendar.
- Formulas – Can be set up to pull Calendar Events rather than entries.
- RUG Forecaster.

All of these features rely on the calendar to display the desired information correctly. When these features don't work correctly, the key is to review the desired data on the calendar, and make sure that it is accurate.