

Document from Table Tasks 10.1.7.0

Importing

There is a new feature, called **Document from Table Tasks**, that allows us to link multiple Document from Table tasks together. For example, we can link the PT, OT, and ST Therapy Document from Table tasks together, so that they can be run at the same time. This means you just need to run one Document from Table task rather than three separate ones when importing therapy for billing purposes. Treatments for all three disciplines would import with one task.

This can be implemented by any facility who currently imports therapy. These instructions are geared towards users who import based on using Access buttons. If you import without using Access buttons, contact American Data's Financial Support Department for instructions. This can be used without access buttons.

Setup Instructions:

1. Go to **American Data-ECS>Maintenance>Document from Table Task**. (Your User Group will need to be granted access to this function before it can be used.)
2. Click **New**.
3. Enter a **Task Name** (like Therapy) in the top.
4. Click **Add** at the bottom. Select all tasks to be included (PT, OT, and ST) and click **OK**.
Note: You must select tasks that use the same table. The tables are listed on the right side of the task list.
5. Click **OK**.
6. Select the appropriate **Sites/Services** that should have access to this task and click **OK**.
7. Select the appropriate **User Groups** that can have access to this task and click **OK**.
8. Click **Close**.

Link the new task to an access button on your Therapy access screen.

1. Go to your **Main Financial Access** screen. Click **Ancillary Charges** and **Therapy**.
2. Click the **Toolbar** tab at the top of your screen (if icons are not visible by default).
3. Click the **Setup** icon on the Toolbar.
4. **Right-click** on the **PT Document from Table** button and choose **Copy**. (If you don't have a PT Document from Table button, right-click on the Document from Table button and choose Copy.)
5. Right-click in a blank space and click **Paste**.
6. **Double-click** the new word you just pasted.
7. Rename this to say **PT/OT/ST Document from Table** in the Short Name.

8. In the **Actions** area at the bottom of the screen, highlight the existing Document from Table task that is linked and click the **Remove** button.
9. Click **Add**.
10. Click **Pick Task(s)**.
11. Select the **Doc from Table Task** button at the bottom of the screen to display the new task you just created.
12. At the top of the screen, select the new **Therapy** task you just created and click **OK**.
13. Click **OK** again on the **Action Details** screen,
14. Click **OK** again on the **Word Properties** screen.
15. Close the setup screen.

Using the new tasks:

1. From the **Main Menu** click **Ancillary Charges**, and **Therapy**.
2. Click the new access button you created.
3. Click **Go**.
4. Click **Import**.

A log will appear when all the services (for PT, OT, and ST) have been imported. If everything imported correctly, the log would display "Import Success - No Errors". If there are errors displayed, normal Document from Table trouble-shooting instructions apply.

Contact American Data's Financial Support Department for questions/assistance.