What's New in ECS 10.1.6.0

Index of Topics Covered

Locate Screen

- In the Locate Screen (History), the checkmark for "Show Details" will now be defaulted as checked on. This is so that the Edit and Remove buttons are available without a user having to know to check the "Show Details" button first. This now eliminates that step and will default checked on opening both options.

Electronic Sign (MAR/TAR)

- On the "Drug Count" report generated from the Sign icon, the Entry column has been expanded.
- There are two new progress wheels in the Electronic Sign screen. One for **Individual** progress and one for **Overall** progress of the entire list of names loaded.
- The **Setup** screen for sign tasks has been re-designed, placing the "Formula" box above the "Entries" box, rather than below.

- Any time that a user copies a word with the "Time" or "Hour" properties turned on, *Copy/Auto Set* will automatically be chosen rather than just *Copy*. This is to help prevent users from copying time/shift words in topics and forgetting to add them to the intended sign tasks.

Electronic CoSign

- The Electronic CoSign screen has been updated to match the updated look of the Electronic Sign screen more closely. These are all cosmetic changes; nothing has been changed to the functionality. Notable changes are:
  - Allergies have been moved to the top of the screen.
  - There are chevron arrows which hide the options for Reports, Write, View, and Signature.
  - The Sign, Sign All, Change, and Remove buttons are now located underneath the Allergies box.
  - There is a frame around today's date.
  - Each row will have a different shaded background to help differentiate between each order.
- Exception reports that are generated from the Electronic CoSign screen will now look at the cells that have been left blank in the current task being displayed. Prior to this change, the report would populate with anything that had never been cosigned at any point in time. For example, this meant that for a Physician Monthly Orders task that several items would never display as exceptions on the report as they had been cosigned in some point in the past. Even though they remained blank on the current task, because the system found a signature from last month, it would not display this as a blank cell on the exception report.

Outgoing E-mails

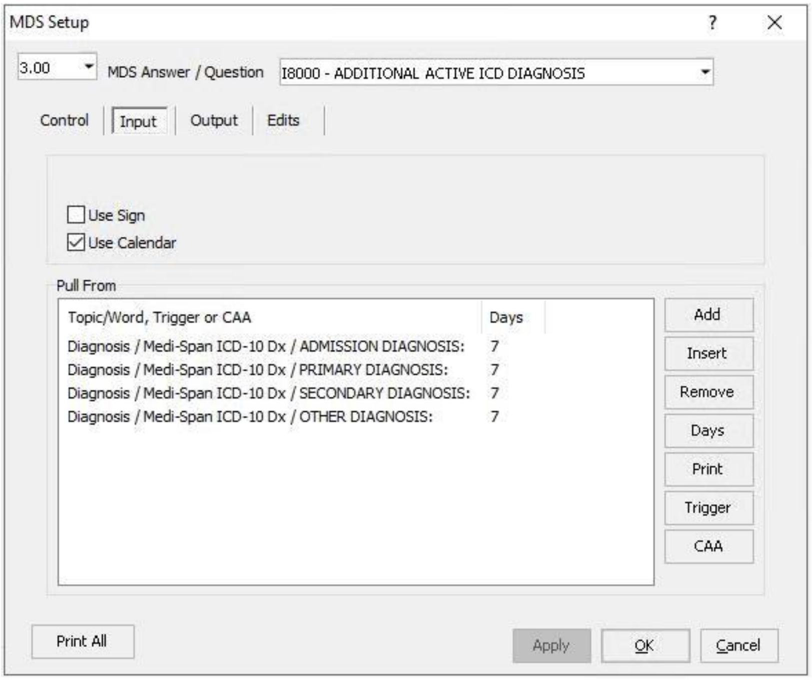
- E-mails that are sent out of ECS that are not sent from the Sign screen will no longer include all the Electronic Sign heading information. Prior to this change, the e-mail would include the headers setup on the Sign icon in the e-mail. In our default system, this had caused Room number, Doctor, Code Status, Pharmacy, and Allergies to send in every e-mail message. The only two items that will now send in the heading of the e-mail is Name and Site.

MDS

- New ICD 10 Diagnoses Tables from CMS have been put in place. CMS has made few changes for FY 2022, but any applicable category changes will go into effect for assessments with an ARD after 10/01/2021.
- Batching MDS assessments (via Transmit) has had significant speed improvements.

- Speed improvements throughout MDS, including writebacks, CAAs, and auditing of assessments.
- On the Electronic Transmission (batch) screen, the Create File button has now been grayed out as the system is processing. This is to stop users from unintentionally creating more than one batch file.
- Section S is no longer a requirement on the MDS for the state of Vermont as of 10/1/2021. All Vermont facilities will need to follow the steps below once they have opened all MDS assessments with an ARD prior to 10/1/2021.
    - Go to American Data – ECS > Setup > Settings > Site.
    - Switch to the correct Site in the left-hand drop-down menu.
    - Click into the MDS tab.
    - Click onto the Section to Sign button.
    - Remove all "X" that display in the S row. Do this by double clicking onto each "X."
    - Click OK to save changes.
    - Section S will no longer be required to be signed as of the date this setup is completed.
- Question I8000 as well as the box to the right of this question may now be setup to be based on calendar. There are instances where diagnosis codes are not entered in until after the target date, which means they are then not populating into question I8000 at all. This causes extra steps for the end user. Having these questions rather be based on calendar will ensure that they are accurately populating and look at the effective date within each diagnosis entry, rather than the date the entry was made.
    - SETUP INSTRUCTIONS:
        - Navigate to American Data – ECS > Setup > MDS 3.0 > Questions.
        - In the MDS Answer/Question dropdown, click into the box and type I8000 so it will jump you to that question. Select the one titled I8000 – ADDITIONAL ACTIVE ICD DIAGNOSIS.
        - Click onto the Input tab.
        - Remove everything out of here and click onto Add.
        - Click into the Diagnosis section. Double click into the Medi-Span ICD-10 Dx topic.
        - Select the words in the beginning of the screen (most likely in column AB) for Admission Diagnosis, Primary Diagnosis, Secondary Diagnosis, and Other Diagnosis.
        - Click OK to add these words into the input screen.
        - Highlight the words and click onto Days and enter in a 7.
        - Place a checkmark in Use Calendar.

- Click **OK** to save changes.



- Running QM reports (via Transmit) has had significant speed improvements.
- A progress status bar has been added when creating an electronic transmission file of MDS assessments. This assists a user in knowing where the file is at in the creation process and will display the assessment it is working on out of the total number of assessments that need to be completed.
- An MDS assessment with Type of Provider (A0200) marked as **Swing Bed**, instead of Nursing Home will now have "(swing bed)" listed in parenthesis behind the assessment name. This is so users can more easily differentiate between the two assessment types without having to open the MDS.

MDS Manager

- A button for MDS Analytics has been added onto the MDS Manager screen.
- When launching the MDS Manager from scratch or utilizing the Refresh button, the user will be presented with a progress bar.
- When launching the MDS Manager, the options for Referral and Closed Account will no longer be checked by default.

MDS Analytics

- The **Diagnosis Totals** report has been updated to work differently. All residents who have had an OBRA or PPS assessment in the 120 days prior to the "Date To" selected will populate into the report. It will only grab the resident's most recent OBRA or PPS assessment and will populate all diagnosis codes found within I0020B and I8000. It does not look at codes in the check boxes in Section I as CMS has no specifications that determine which specific ICD codes map to each question. It will then display the total number of residents who have each of the diagnosis codes. When a user selects the report for Diagnosis Totals, the Date From will gray out and will auto populate once the user selects a Date To.

- The **Options** area is now functional. This portion of the screen was designed into the initial programming but was not yet functional. There are three options available in this section of the screen. A user may now utilize the options for Include OBRA, Include PPS, or Include MC Replacement. By default, all three will be checked, or for certain report types, these options may be grayed out (i.e., Medicare Days will gray out the Include OBRA option).
- A new report type titled **NTA Points (PDPM)** has been added. This allows users to see all resident's more easily and their qualifying NTA points at one time, rather than having to go one by one via the Explain button in each resident's MDS. This data can be printed or exported.

NTA Score of PDPM HIPPS Code

Site 1 \ SNF Care

12/01/2020-08/03/2021

Date Printed: 08/03/2021

Name	Assessment Name (Target Date)	PDPM HIPPS Code	MDS Item	Points
Edwards, Jack C	Not OBRA - IPA (05/27/2021)	KFBA0	I5200	2
			I6200	2
			I2900	2
			O0100E2	1
			I1300	1
			I5600	1
			O0100M2	1
			H0100D	1
			K0510B2	1
			Bone/Joint/Muscle Infections/Necrosis - Except : RxCC80: Aseptic Necrosis of Bone= I8000F: A69.23	2
			Cardio-Respiratory Failure and Shock= I8000H: J96.00	1
			Morbid Obesity= I8000B: E66.2	1
			Proliferative Diabetic Retinopathy and Vitreous Hemorrhage= I8000C: E11.3523	1
			Total	**17**
Hershey, Darlene	Annual - Not PPS (07/23/2021)	PDEB	O0100H2	5
			M0300D1	1
			K0510B2	1
			H0100C	1
			Bone/Joint/Muscle Infections/Necrosis - Except : RxCC80: Aseptic Necrosis of Bone= I8000D: M86.00	2
			Total	**10**
Anthony, Susan B.	Not OBRA - Not PPS (5 day) - DC-RA (PPS Discharge) (02/15/2021)	PGPE1	I2900	2
			Total	**2**
Zeik, Sharon B	Not OBRA - Not PPS (5 day) - DC-RA (PPS Discharge) (06/24/2021)	PFMD1	O0100I2	2

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- A new report type titled **Nursing Components (PDPM)** has been added. This allows users to see all residents at one time and the questions on the MDS which qualified them for that Nursing Component, rather than having to go one by one via the Explain button in each resident's MDS. This data can be printed or exported.

Nursing Component of PDPM HIPPS Code

Site 1 \ SNF Care

08/06/2020 - 08/06/2021

Date Printed: 08/06/2021

User: Ceaser, Heather D

Name	Assessment Name (Target Date)	HIPPS Code	NSG Comp.	Depressed	Rest. Nursing	Function Score	ES - Extensive Services	H - Special Care High	L - Special Care Low	C - Clinically Complex	B - Behavioral Sx &	P - Reduced Phy. Function
Adams, Suzanne C	Not OBRA - 5 day (09/21/2020)	ICDD1	HDE2	Yes	0	2	-	I6200 J1100C	-	-	-	-
Edwards, Jack C	Not OBRA - IPA (05/27/2021)	KFBA0	ES2	No	0	14	O0100E2	-	-	-	-	-
Yankee, David H	Correction(M) Not OBRA - IPA (Swing) (06/27/2021)	JAUF0	PDE1	No	0	5	-	-	-	-	-	DEFAULT
Wetzel, Justin D	Significant change in status - 5 day (10/02/2020)	FBUD1	PDE1	No	0	4	-	-	-	-	-	O0500AB
Einstein, Albert	Not OBRA - 5 day (08/11/2020)	OHNC1	CBC2	Yes	0	12	-	-	-	O0100C2	-	-
Adams, John	Not OBRA - 5 day (08/10/2020)	CIRE1	BAB2	No	2	12	-	-	-	-	H0200C O0500DF	-
Jefferson, Thomas	Not OBRA - 5 day (10/05/2020)	KGCC1	ES1	No	0	12	O0100M2	-	-	-	-	-
Doe, Jane	Admission - 5 day (02/17/2021)	GDSF1	BAB1	No	1	11	-	-	-	-	O0500G	-
Spears, Britney	Correction(I) Not OBRA - 5 day (Swing) (02/17/2021)	KHJD1	LBC2	Yes	0	9	-	-	I6300 M1040A M1040B M1040C M1200I O0100C2	-	-	-
MDS, Ughh	Correction(M) Not OBRA - 5 day (Swing) (12/24/2020)	LDSF1	BAB1	No	0	16	-	-	-	-	x	DEFAULT
Yahoo, Darlene	Admission - 5 day (04/07/2021)	KAFF1	HBC2	Yes	0	7	-	K0510A1	-	-	-	-
Davis, Darlene K	Admission - 5 day (04/07/2021)	KAFF1	HBC2	Yes	0	7	-	K0510A1	-	-	-	-
Total: 12	-	-	-	5	3	Avg: 9.25	2	3	1	1	2	1

Survey Reports (802 & 672)

- Both reports will prompt with the **Name Selection** screen upon being launched.
- The **Setup** button within these reports can now be controlled via User Group rights. This means that a user can have access to the Write version to make changes within the cells, but not be allowed capabilities to make changes to whether each cell populates from MDS or from charting.
    - This new user group right is located within the rights tree by clicking the arrow to the left **of Setup > MDS 3.0**. There are two options now located here, one for 672 and one for 802 (2017). Click into the box to the left until you see a green checkmark which will grant access or a red "X" which will restrict access.
    - Once the update runs, any user group who currently has access to Write > Survey > 802 or Write > Survey > 672 will also now have rights to the Setup of these reports. System supervisors will want to review this after the update runs to determine which user groups should now be restricted from making setup changes on these reports.

Change Log Viewer

- Changes made within the Survey Report – 672 are now being tracked in the Change Viewer. When in the Change Viewer, click the picklist box to the right of "Select function to view" and there is now an option for Survey Report 672.
- Changes made within the Survey Report – 802 (2017) are now being tracked in the Change Viewer. When in the Change Viewer, click the picklist box to the right of "Select function to view" and there is now an option for Survey Report 802.
- Within System Settings, several items are now being tracked within the change viewer which were not before. These options include Enable Whitelist on the Other tab, Reverse Chronological and Line Between Entries on the Review tab.
- Within Site Settings, several items are being tracked within the change viewer which were not before. These options include all changes made on the PDPM tab, Script tab, and several on the MDS tab.

Importing

- The Import from File screen is now a tab which allows the ability to link these tasks to access buttons.
- The Import process has been enhanced to allow importing based on Vendor Number.
- You can now link a Document from Table task to an access button.

Financial Forms – HCFA 1500

- Field 24F has been expanded to allow you to manually enter in 9 characters rather than just 6.

Financial Forms – UB04

- Condition Codes (Fields 18-28) on the UB04 have been enhanced so that if a Condition Code fills in, and there are blank Condition Code fields to the left of it, the code that fills in will move to the first blank field. For example, if you get a DR Condition Code populating in field 19, but field 18 is blank, the DR will automatically move to field 18 which will eliminate the claim rejections for a blank condition code.
- We modified the functionality of the Apply to All Setups button to make it easier to use.

Receipts/Adjustments

- We changed how the Receipts/Adjustments screen handles the Display All checkbox. It now stays checked when you click the Control button.

Financial Fields in Report Maker

- We have added a checkbox in the Financial Fields of Report Maker called Show Notes. This works in conjunction with adding notes directly on the Aging and allows you to print a report, showing only what is outstanding, and the associated "collection" notes tied to those outstanding charges. If this is something you are interested in, please contact American Data's Financial Staff for assistance using the aging and creating a report to pull these items.
- We have added Discard Beyond Field to Financial Fields in Report Maker. This can be set on Checks so that if there is more detail than fits on one page, the report will only display one page. If this happens, users can click the Error button on the toolbar to see which vendors have additional data that didn't fit on one page.

Bank Reconciliation

****If you are currently using the Clear/Reconcile function, you should reach out to American Data's Financial Staff for assistance in reviewing these changes.**

- The Clear/Reconcile function has been renamed and is called Bank Reconciliation.
- The order of the fields at the top of the Bank Reconciliation screen have been re-arranged to match the order on a bank statement. We have also removed the Date, Check No., Amount field, and the Clear button from the top of the screen. We also added a box to show what Cash Account number is included in the task.
- We have separated out the Deposits from the Withdrawals into two separate columns on the Bank Reconciliation screen. This does mean that if you are using the Bank Reconciliation you will need some minor setup changes for it to work properly.
- A user may enter a Target Balance, from the bank statement, when using the Bank Reconciliation function. If the Target Balance does not match the New Balance, you will not be allowed to Post.
- An optional Statement Date has been added to the Bank Reconciliation screen. This allows you to choose a Statement Date that is associated with the transactions that you are clearing. If you choose a Statement Date, the transactions with displayed Cleared with the Statement Date. Transactions cleared without the Statement Date will continue to say Cleared.
- We enhanced the Print button to include the printing of the fields across the top of the screen (Previous Balance, Withdrawals, Deposits, and New Balance.)
- You are now able to export the Bank Reconciliation screen to Microsoft Excel.

Accounts Payable

- We have the ability to import vendor demographics to populate vendor lists as well as import vendor profile information.

- When paying vendors, you have been able to enter in an E in the Check Number field to indicate a payment was made by something other than a paper check. You are now able to enter in E or ACH to indicate this.
- The icon on the toolbar called "Banking" has been re-named to be called "AP Aging".
- We have added the ability to send payments via ACH.
- We added ACH Settings to the system to track information needed to send ACH transactions to your bank. These are found in American Data-ECS>Setup>Financial<ACH Settings. These changes are tracked in Change Log Viewer.
- On the Checks screen (Write>Payables/Adjustments) you can see if a payment was sent via ACH and when it was sent. Click the Display All checkbox on the Control screen. You will see "Sent MM/DD/YYYY" in green on the left side of the line if the payment was sent via ACH and not yet cleared. Once it is cleared, this will display as Cleared and the date it cleared the bank.
- On the Checks icon (Write>Payables/Adjustments) control screen, we added an ACH checkbox. This setting will tell ECS to utilize the ACH settings, and the bank account information charted on a vendor to send a payment via ACH. If a Vendor does not have bank account information charted, the vendor's name will not appear.
- If a payment was sent via ACH, you are not allowed to reverse the payment.
- We created an Analyzer that allows us to review the ACH file that was created that can be used in troubleshooting if there is a problem with the file. An ACH file will be saved in a location that is defined in ecs.properties on the server and will be stored for 30 days. This is found in American Data – ECS>View>ACH Analyzer.
- In Site Settings, on the Financial Tab, we added a field called State Account No. that is required on certain 1099 forms.
- When you are on the Checks icon (Write>Payables/Adjustments screen), the Print button has been fixed to print what is on the screen.
- We have added Search functionality to the Checks icon (Write>Payables/Adjustments screen).
- We added the ability to Export the Payables/Adjustments screen to Microsoft Excel.
- We created a new word property called Chart of Accounts AP Descriptions. This is found on the Text Control tab in word properties. This allows us to display the description of an account number in an entry.
- Access Buttons for Accounts Payable have been enhanced to have an AP Over-Ride area. This allows us to link a task and change the function of the task on the access button, eliminating the need for multiple tasks. For example, the same task can be used for paying vendors as for voiding a check with this setup.
- We can import Vendor Names into the Demographics screen with a new utility so that users do not have to manually enter them all in during implementation.
- On the Checks icon (Write>Payables/Adjustments screen) we have removed the option for Clearing. It is only found in the Bank Reconciliation function now.

- The AP Aging report can be exported to Microsoft Excel.
- You are not allowed to Reverse a payment that has already been marked as having cleared the bank. If a user tries to do this, an error message will be displayed. This has always been true. The error message is new.
- On the AP Aging Control screen, the Activity to Date checkbox was not functioning properly and it has been fixed. Checking Activity to Date will display transactions within the selected period, omitting payments or invoices that were made outside of the selected date range.

General Ledger

- Many enhancements have been made to the setup of General Ledger reports to make them easier to create and manage.
- Users can create a Custom Header in their General Ledger reports. If a Custom Header is chosen, it will appear in the GL Report Setup screen under the actual Report Name, as well as on the General Ledger tab when the report is previewed. The Custom Header can have different font than the Report Name.
- There is a new menu option linking directly to General Ledger reports. This new menu option allows you to link an access button to the list of General Ledger reports, which may be used less frequently, but are still needed.
- Within the General Ledger report setup, we added options for Only Show Accounts with Activity, Print Hidden Columns and Rows, and By Clients. These were previously found within the General Ledger report preview screen.
- We added the ability to add custom Footers to the General Ledger reports. The Footer options are all checked by default and may be un-checked by the user if desired when creating a report.
- General Ledger reports now allow you to drill down and see itemized journal detail making up the numbers on your General Ledger reports. On the General Ledger Reports tab, click an amount that you would like to see details for. The details will display along the right side of the screen. These details may be printed or exported using buttons at the bottom of that right panel. Clicking somewhere on a line, other than an amount, will display detail for the first amount column in the report. In the Detail panel on the right, you may sort the data by clicking on the column headings. You will also see colored symbols that associate with Original, Reverse, and Auto-Adjusted transactions.
- There is an option called require Active Accounts, found in American Data – ECS>Setup>Financial>General Ledger>File that provides an error if a user tries to use an inactive account.
- The Budget area within the Define Accounts screen has been updated and there is a new Budget tool for managing budgets. Within the Define Accounts Screen, you may still update a Budget, but more efficiently is the new Budget function. This can be found by going to American Data – ECS>Setup>Financial>General Ledger>Budgets.

Budgets will follow the month structure of the Fiscal Year defined in American Data – ECS>Setup>Financial>General Ledger>Edit Lock Periods.

- Within the Chart of Accounts, if you open a Define Accounts screen (open an account number) there are Next and Previous buttons that allow you to easily navigate between account numbers.
- In the General Ledger Lock Periods, we have removed the options for Fiscal Year/Same Year. ECS will know that based on the months that are selected on this screen. The Lock Periods screen will display months based on what you have chosen for your year. If your fiscal year starts 07/01/2021 and runs through 06/30/2022, you will see July 2021 through June 2020 on the Lock Period screen.
- There is a new setup screen that relates to a future Year End Process within ECS. The setup screen is located at American Data – ECS>Setup>Financial>General Ledger>Year End Process. At this time, there is a setup that controls Retained Earnings. The setup screen has been completed, but the functionality of the Year End Process is not in place in this update.
- We created an Ignore Prefix option within GL Report setup on Row Properties that allows us to create Composite Type reports that combine accounts regardless of pre-fix.

ECS Mobile

The desktop version of ECS was enhanced with the following features that have now also been carried over into the ECS mobile environment:

- The Text Control > Difference property now works in the mobile environment.
- The system setting feature of Reverse Chronological.
- Reports that have variable height fields located in them. The only type that is still not supported is a variable height report that also has a signature field on it. Users will continue to receive an error if they attempt to run a report that has both these settings on it.

Contact Information

Email Addresses

- Signing up for E-mail Lists: CARES@american-data.com
- Clinical Support: clinical@american-data.com
- Financial Support: financial@american-data.com

Phone Number

- General Inquiries/Support: 1-800-464-9942