Enhancements in ECS10 – AR – July 2022 Webinar

Access Buttons

Since we began programming in ECS10, we have implemented several enhancements related to the Access buttons to improve the efficiency of your daily tasks. These enhancements also make training new staff easier as the buttons are more logical and have added functionality.

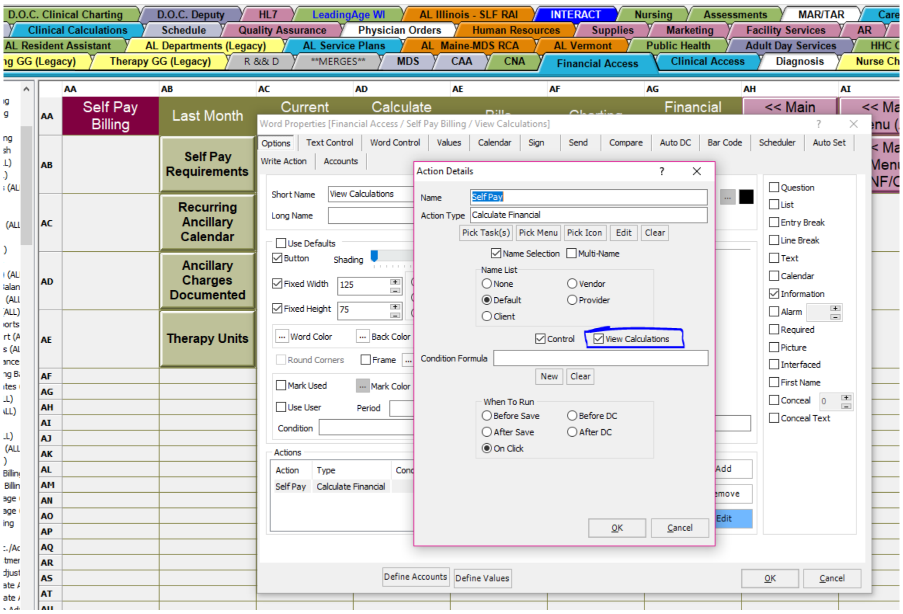
This functionality can be implemented for you by American Data's Financial Department if needed. It typically takes us about 2 hours to complete all setups listed here.

View Calculations Buttons on the Billing Screens

You may already have buttons on each of your billing access screens, called View Calculations. They currently take you to the Calculate Control screen and prompt you to select a task, names, and then click View Calculations. The enhanced functionality in ECS10 allows us to link the appropriate Calculate Task and brings you directly to the View Calculations screen.

To make this change:

1. From the **Main Financial Access** screen, click **Billing**, and choose a **Payer Source**.
2. Click the **Setup** button on your toolbar.
3. Double-click the **View Calculations** button.
4. In the **Actions** area, at the bottom of the screen, highlight the **calculation task** and click **Edit**.
5. Place a checkmark in the **View Calculations** checkbox.
6. Click **OK**.
7. Click **OK** again.
8. Close the Setup screen by clicking on the **x** on the Setup tab.
9. From your access screen, navigate to another payer source.
10. Repeat steps 2-8 until all payers have been updated.

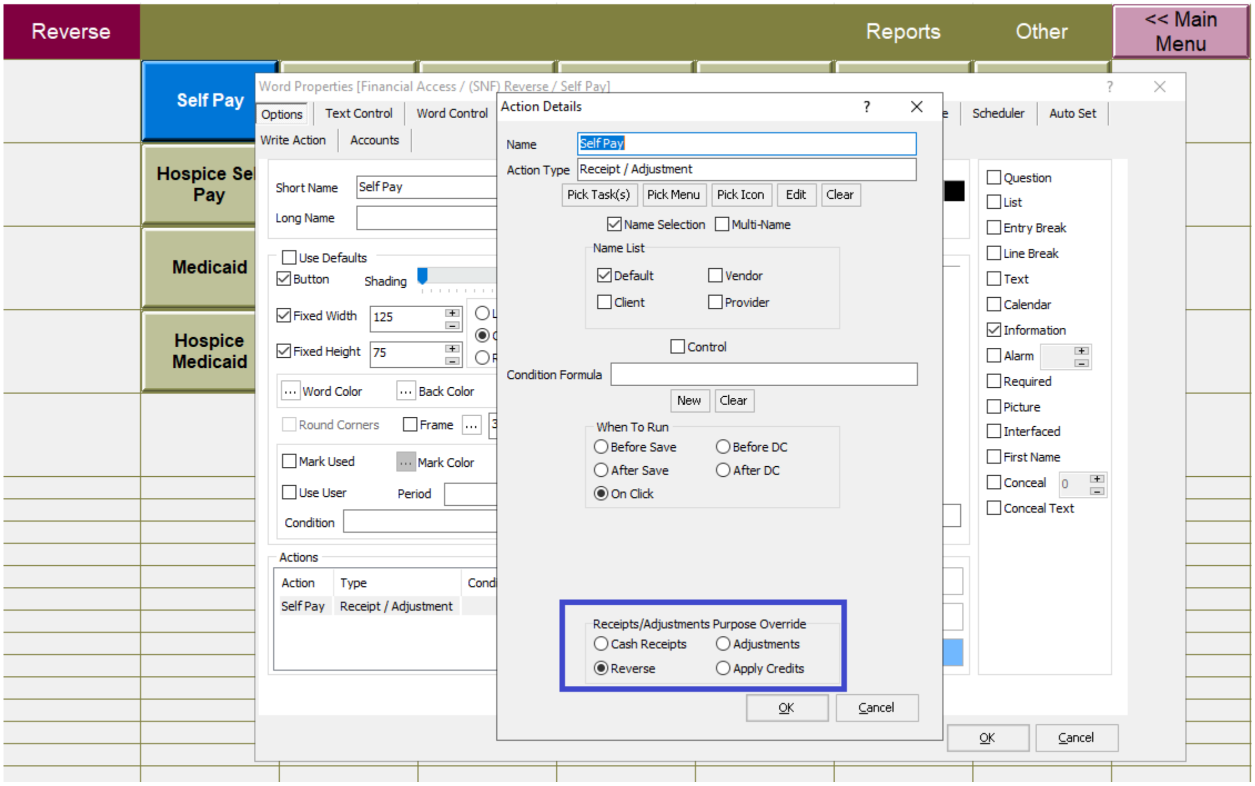


Receipts/Adjustments Tasks

Enhanced functionality has also been applied to the Receipts/Adjustments module. We can link access buttons that will automatically load the task with Adjustments selected, or Apply Credits, or Reverse. This eliminates the need for users to manually edit the Post Cash task after it is loaded to switch the Purpose of the task. This is both time saving and easier to explain to new users.

Setups Required

We start by creating brand new access screens for Reverse, Adjustments, and Apply Credits. We copy the buttons from the Post Cash screen and paste them into the new screen. We then link these new screens to buttons on your existing Post Cash Screen. In the new access screens, within the Actions area of the Word Properties, we have added "Receipts/Adjustments Purpose Override" options that are used. The new Reverse Access Screen has buttons that are all set with the Reverse override, etc.



Since we make new access screens and link these new screens to existing access screens, the setup is a bit complicated. This is something that American Data's Financial Support Department should do for you.

View UB04s Buttons on the Billing Screens

You may have buttons on your billing access screens, called View UB04s. They currently take you to the UB04 screen and prompt you to select a task, names, load the task, click No about processing a new form, and then click the Open button. The enhanced functionality in ECS10 allows us to link the appropriate UB04 Task and brings you directly to the Open button on the UB04, displaying all existing UB04s.

To make this change:

1. From the **Main Financial Access** screen, click **Billing**, and click on a **Payer Source**.
2. Go to the **Setup** icon.
3. Double-click the **View UB04s** button.
4. In the **Actions** area, highlight the **Medicare (A) Financial Forms – UB04** task name and click **Edit**.
    a. **Note**: If your button does not have this linked, you will need different instructions to complete setups.
5. Place a checkmark in the **Form Open Button** checkbox.
6. Click **OK**.
7. Click **OK** again.

8. Close the Setup screen by clicking on the **x** on the Setup tab.
9. From your access screen, navigate to another payer source.
10. Repeat steps 2-8 until all payers have been updated.

Calendars

Show Unbalanced Only

Show Unbalanced Only is a feature that is used with Requirements calendars and Daily Census calendars. If the data that is required on one of those calendar reports is missing, you can click the Show Unbalanced Only checkbox at the top of your screen to find out who is off and why. This feature does require some setups to be put in place.

Monthly Totals

Users have asked for Calendar reports that span an entire year. For example, to show Medicaid days for an entire year. On the Calendar Control Screen, there is a Monthly Totals checkbox that can be checked on any Calendar Report you run. Check the Monthly Totals checkbox and run any calendar for an extended period. On the right side of the report, you will see totals for each month in the period. The usual totals will include data for the entire period. Tasks can be saved with this checkbox if desired. When printing the Calendar reports, there is also a Monthly Totals Only option that can be selected.

Importing

We have added the ability to link your Import from File access button to the actual task for importing, rather than just take you to the Import From File menu option where you have to still pick a task. We are also able to link your Document from Table tasks to the actual task. Both enhancements save some clicks and prevent users from selecting the wrong task.

To make this change:

1. From your **Main Financial Access** Screen, navigate to the screen where your existing Therapy Import access buttons are.
    a. Note: If you don't have access buttons linked, American Data can assist with this setup.
2. Click the **Setup** Icon on your toolbar.
3. Double-click on your **Therapy Import From File** button.
4. In the Actions area, highlight the option that is there and click Remove.
5. Click **Add**.
6. Select **Pick Task(s)** button.
7. Select the Import from File option at the bottom of the screen.
8. Select the appropriate Therapy Import from File task and click **OK**.
9. Click **OK** again on the Actin Details screen and click **OK** one last time on the Word Properties screen.

Importing Therapy – Consolidated Tasks

Importing Therapy has consisted of running one Import from File task, and then 3 separate Document from Table tasks. One for PT, one for OT, and one for ST. In ECS10, we improved the access button functionality to be able to link these tasks to access buttons. In v10.1.7.0, we also improved the importing process by allowing us to consolidate the PT, OT, and ST Document from Table tasks into one task.

To make this change:

1. Go to **American Data-ECS>Maintenance>Document from Table Task**. (Your User Group will need to be granted access rights by your System Supervisor to access this.)
2. Click **New**.
3. Enter a Task Name (like Therapy) in the top.
4. Click **Add** at the bottom.
5. Select all tasks to be included (PT, OT, and ST). Click on the correct PT task. Hold the **Ctrl** key on your keyboard. Select the appropriate OT and ST tasks. Click **OK**.
6. **Note**: You must select tasks that use the same table. The tables are listed on the right of the task list. You may have multiple therapy tasks listed so be sure to select the currently used tasks.
7. Click OK.
8. Select the appropriate **Sites/Services** that should have access to this task and click **OK**.
9. Select the appropriate **User Groups** that can have access to this task and click **OK**.

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

1. From your **Main Financial Access** Screen, navigate to the screen where your existing Therapy Import access buttons are.
2. Note: If you don't have access buttons linked, American Data can assist with this setup.
3. Click the **Setup** Icon on your toolbar.
4. Right-click on an existing access button and choose **Copy**.
5. Right-click in a blank cell and click **Paste**.
6. **Double-click** the button you just pasted.
7. In the Short Name type PT/OT/ST Document from Table.
8. In the Actions, highlight the task that is listed and click **Remove**.
9. Click **Add**.
10. Click Pick Task(s).
11. Select the **Doc from Table Task** radio dial at the bottom of the screen.
12. In the Task Name at the top of the screen, select the new Task that you created.
13. Click **OK**.
14. Click **OK** again.
15. Close the Setup screen.

Using the New Tasks:

1. Go to the Main Financial Access Screen.
2. Navigate to the topic where you created the new access buttons. It might be the **(ALL) Therapy** topic or the **(SNF) Ancillary**.
3. Click the **Import from File** button. This should load your appropriate Therapy task. Select the file, and click Go as normal.
4. Click **OK** on the **Done** message.
5. Click the **PT/OT/ST Document from Table** button that you just created**.**
6. Click **Go**.
7. Click **Import**. A log will appear when 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, normal Document from Table instructions apply for troubleshooting. Contact American Data's Financial Support Department for questions/assistance.

Aging

Notes

Across a few versions, we have added the ability to add notes to individual lines on your aging. These notes can be viewed on screen and attached to specific charges/dates of service. They can be printed or exported as well.

To use this, your aging tasks need some minimal setup. You may have an existing Collection topic that can be used. Clients have chosen to customize this topic to meet their specific needs. American Data's Financial Support Department can assist with setups if needed.

To Use the Aging once it has been set up

1. Run the selected aging from the Aging access screen.
2. Click the **Summary** checkbox at the top of the aging to see the aging detail.
3. Highlight any line that you'd like to add notes to.
4. Click **Write** on the toolbar. This will open a documenting screen.
5. Write your note and click **Save** and **Exit**. When you re-select that line (or any line with a note) the note will display on the right side of the screen.

To see all notes associated with a resident's account

1. Click the **Resident's Name** on the left side of the screen (instead of an individual charge line). The right panel will display all notes associated with the selected name, for the selected task.

To Print the Aging Notes

1. Click the **Print** button on the Aging toolbar.
2. Select **Details**.
3. Place a checkmark in **Notes**.
4. Click **OK**.

5. A report preview will be displayed. Click the **printer** icon to send this report to the printer.
6. Click the **Exit** button to leave the preview and return to the aging screen.

To Export the Aging Notes

1. Click the **Export** button on the Aging toolbar.
2. Select **Details**.
3. Place a checkmark in **Notes**.
4. Click **OK**.
5. Navigate to where you'd like to save the report.
6. You may change the file name if desired and click the **Save** button.

Demographics and Date of Birth

You can add Date of Birth and/or Demographic information to your aging. For example, it is helpful to have the DOB and Medicaid number when doing Medicaid collections, right on your aging. We can default your Medicaid Aging to have this data. The Demographic options include Record No., Medicaid No., or Medicare No. (MBI).

UB04 – Discipline Specific Processing

There is a processing option, within the UB04 setup options, called Discipline Specific Processing, that has been enhanced. This option should be turned on your Medicare (B) type UB04s to allow the UB04 to process codes in field 31-34 based only on what Therapy disciplines are on the UB04 in field 42. There are some setups required in the words pulled to this field (Onset Date, Start of Care Date, etc.) in addition to the UB04 setup option. In a recent version the processing has been applied to the diagnosis code fields on the UB04s as well so that only diagnosis codes for the disciplines that are on the claim are pulled. These setups require American Data to complete them for you.

Charge Master Tasks

Access buttons can be linked to individual Charge Master tasks. If you have not your Rate Changes access screen updated with buttons for the different rates you enter, we can do this for you.

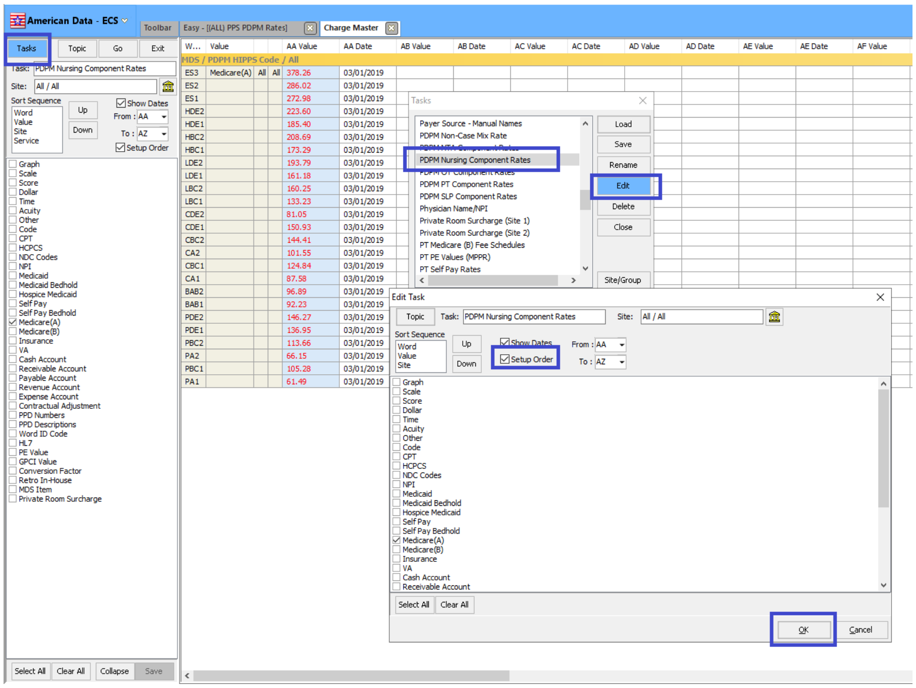
Selected Order

Selected Order is an option that allows us to display words in a task in the order we select them, rather than in alphabetical order. This is a useful function on the PDPM Nursing Component Charge Master task, or potentially your State RUG task.

To Edit the Charge Master Task and set Selected Order

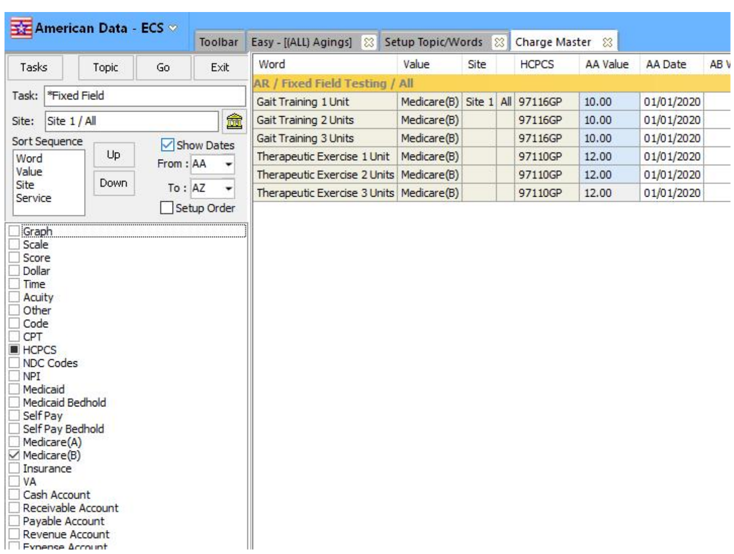
1. From your Main Menu, click **Rate Changes**.
2. Click **PDPM Rates** and **Nursing Component** or the button to get you to the Nursing Component Charge Master Task. To access Charge Master from the menu, go to American Data – ECS>Setup>Charge Master.
3. Click **Tasks**.

4. Select the **PDPM NTA Component** Task and click **Edit**.
5. Place a checkmark in the Setup Order checkbox.
6. Click **OK**.



Fixed Field

Fixed field is an option that allows us to display words in a task but to also display a value associated with them. This was primarily developed to assist users entering fee schedules in those therapy screens that have separate words for each unit of the same treatment. For example, 1-unit Therapeutic Exercises, 2 units Therapeutic Exercises, 3 units Therapeutic Exercises, etc. You can see in the screen shot that I could see the word name as well as the HCPCS column for each word.



Report Maker

Site Settings

Within Site Settings, at the Service level, we added a tab called Picture. This allows you to attach a picture to a Service. For example, a logo. You can then add a picture field to a report and have it pull the Service specific picture. Within Report Maker, in a Picture field, there is a new checkbox called Use Site/Service Picture. For example, you may want to put a logo on many reports. If/when the logo is updated, you only must update it in Site Settings and all reports will be updated automatically. If you have logo's in your reports (clinical and/or financial reports) and would like assistance with this setup, contact us.

Summary

There are a lot of additional enhancements in ECS10 that have not required setups. This webinar is to present those items that do require some setup to be implemented. Some of the setups are a bit tricky and can be time consuming. Therefore, we recommend reaching out to American Data's Financial Department to have the setups completed for you. You do not have to implement all of them (although we recommend you do) so if there is something you don't want, we can work that out with you ahead of time. All the setups can be completed with a small amount of setup time. Our billable rate is $100.00/hour.

Please email financial@american-data.com request the setups to be completed for you.

If you would like to see a comprehensive list of the enhancements that have been made to ECS10, please refer to the What's New documents for each version. These may be found on the Client Sign On portion of our website, under Documents, and What's New.