Take Aim and Pull the Trigger on Better Documentation

Triggers function in various ways. How the trigger is intended to function effects how it is setup. When thinking about triggers, first decide if the trigger is to be **automatic** or **manual**. **Automatic triggers** are run using the *Automatic* icon or may be set to automatically document from a topic/word. The automatic triggers automatically document all necessary information. **Manual triggers** require the user to complete the documentation. Manual triggers are run using the *Triggers* icon. These triggers search records to determine whether the user must document something. Both above trigger options may be linked to an easy access button and to a button within a documenting screen.

Create a New Trigger

1. Click onto American Data – ECS > Setup > Triggers.
2. Click onto **New**.
3. Type in the name of the trigger.
4. On the <u>Formula</u> tab, construct the formula by using the buttons on the side of the screen. The formula is the equation for the computer. If the computer is to search records for information (or lack thereof), this must be defined. Start by clicking onto IF which will be the first node of the formula that is built. An example formula for a trigger may be the following steps:
    a. Select **IF.**
    b. Select **ANY**.
    c. **Topic/Word** > Navigate to the Nursing/Fall Note topic and select the word "observed fall" and "fall not observed." Click **OK**.
    d. Highlight the node "IF ANY" and click onto **Days**. Type in 31, click **OK**.
    e. Place the dot in **Client.**
    f. **Note:** It is very important that the dot for Apply is set correctly or this may cause issues with the formula running appropriately.

       Entry:
       Client:
5. Fill out any necessary information on the <u>View</u> tab.
    a. **Include D/C:** Triggers search active entries only by default. Put a check in here to include also discontinued entries in the search.
    b. **Show the "triggered" entries found:** Displays the entry which causes the trigger to be true. The entry is displayed at the top of the view screen in green font when the trigger is executed.
    c. **Line Between Topics:** Places a line between different topics.

d. Space Between Topics: Places a spcae between different topics.
e. Space Between Entries: Places a space between different entries.
f. Show Name of Initials: Displays the user's name, along with their initials.
g. Client Page Break: Places a page break between clients when trigger is executed.
h. Topics/Words: The topics/words displayed here define what, if anything, displays in the view screen when the trigger is executed. This would only be relevant for a trigger which is manual.

6. Fill out any necessary information on the Write tab. Add topics into the "Manual" portion if users should be prompted to manually document in a topic or add words into the "Automatic" portion if words should automatically document if the trigger qualifies.
   a. Manual Write Topics if triggered: Defines the topics that are presented to the user when the trigger qualifies when exucuted.
   b. Automatcally Write Words if triggered: Defines the words that automatically document when the trigger qualifies. Note: words will document in the order they are listed.
   c. Discontinue triggering entry(s) if triggered: When this is checked, the entry that qualifies the trigger is automatically discontinued when the trigger is executed.
   d. Disable Send: Disables the properties under the Send tab for words that are automatically documented by the trigger.
   e. Disable Input After Word: Disables the requirement for input after words that are automatically documented by the trigger.
   f. Disable Control: Disables the settings under the Word Control tab of the word setup for words that are automatically documented by the trigger.
   g. Disable Compare: Disables the properties under the Compare tab of the word setup for words that are automatically documented by the trigger.
   h. Disable Auto DC: Disables the properties under the Auto DC tab of the word setup for words that are automatically documented by the trigger.
7. Click OK to save the trigger.
8. Select the appropriate Site(s)/Service(s) that should have access, click OK.
9. Select the appropriate User Group(s) who should have access, click OK.

Common Trigger Formulas

Quarterly Assessment Triggers

These are created to search for information that is due during specific time periods. If the documentation is found during the period, the user does not need to re-document the information. If the information is not found, the user is prompted to complete the assessment via a manual trigger.

If _________ assessment is NOT found in the past ____days/months, then document _________.

1. IF NOT ANY – Activity Assessment – Past 82 days – document Activity Assessment.
2. IF NOT ANY – AIMS Assessment – Past 92 days – OR NOT ANY – Antipsychotic Medications – document AIMS Assessment.

Follow Up Documentation Triggers

These are created to prompt staff to document follow-up information. If the information is not found, the user is prompted to complete the charting via a manual trigger.

If _______ is found and ______ is not found, then document ______.

1. IF ANY – fall observed / fall not observed – Past 3 days – AND NOT – fall follow-up – Past 3 days – document fall follow up.
2. IF ANY – PRN MED ADMINISTERED – past 7 days – AND NOT – PRN MED FOLLOW UP – Past 7 days – document PRN medication follow up.
3. IF ANY – Skin breakdown, pressure injury, etc. – AND NOT – Care Plan/Skin – document Care Plan/Skin.

Automatic Chart Audits

These are created to automatically review charts and alert users to missing data. These audits are automatic. The user "runs" the audit and reads the results list to determine what is missing from the record. The formulas for the audits are just as the previous formulas, however they are automatic triggers. Instead of putting the documentation topic in the top portion of the screen, place the words to be documented in the bottom portion of the screen.

Typically, a topic titled "Chart Audit" will be created where a group of words can be stored that will document if triggered. For example, these words may include: Antibiotic follow-up charting missing, PRN follow-up missing, Quarterly Fall Assessment overdue, Quarterly BIMS assessment overdue. This serves as more of an informational topic then a place where users can correct the missing charting from.

Temporary Care Plans

These triggers are created to automatically document care plans when selected. These are intended to be generic care plans that may pertain to a particular population of residents. These care plans are meant to be temporary and allow for the staff to update them as needed to make them more patient centered. A basic formula might be:

IF NOT "care plan", then document ______.

The "care plan" is where the care plan topic would be listed because if the resident already has a care plan in that topic, you will not want a secondary one to be written.

1. IF NOT – Pain/Comfort Care Plan – automatically document the following words in the Pain/Comfort Care Plan:
    a. I LIKE: to be comfortable, to keep my pain at a minimum
    b. I need my nurses to --- ask me if I hurt, remind me to take my medicine

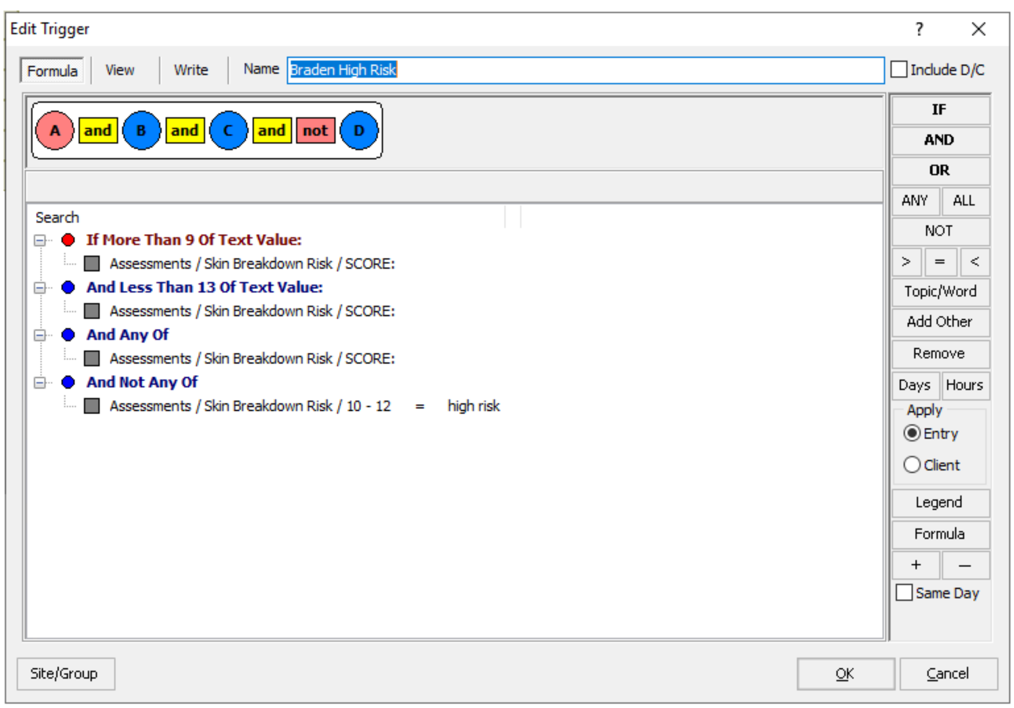
c. I need my aides to --- ask me if I hurt, be patient with me, help me to change position, distract me with an activity
d. MY GOAL IS: maintain my pain at an acceptable level
e. GOAL TIME: two weeks

2. IF NOT – Falls Care Plan – automatically document the following words in the Falls Care Plan:
   a. I NEED: help minimizing safety risks
   b. I need my nurses to --- assess the need for adaptive equipment
   c. I need my aides to --- stay with me during cares, use assistive devices to be available when needed, apply alarms as directed
   d. MY GOAL IS TO: stay safe in my environment
   e. GOAL TIME: two weeks

Document a Risk Level for a Scored Assessment

Several assessments in ECS are scored and are associated with a risk level. This can be setup to automatically document once the score is calculated. This will only work if the assessment is calculating the score directly on the screen itself. In addition, the risk categories will also need to be listed in the assessment screen for this to work. Examples of assessments this may work for include: AIMS, BIMS, Cornell Scale for Depression, Fall Risk, Geriatric Depression Scale, Nestle MNA, PHQ-9, Skin Breakdown Risk (Braden/Norton), and SLUMS Exam.

A trigger will need to be created for each risk category option. For example, if looking at the Braden assessment, there are categories for no risk, mild risk, moderate risk, high risk, and severe risk. This means you will need to build a trigger for each of those different risk categories (which means five for the Braden). The below formula is for high risk. The formula is stating if the score is between 10-12 and the word SCORE has been written on the screen,



but the risk level has not already been charted, then it should automatically document what is listed in the Write tab. The Write tab has two words listed in it: *RISK CATEGORY* and *10-12 = high risk*.

Once the trigger(s) have been created, then they will need to be linked to the assessment. These are linked in the Topic Properties of the assessment.

1. Navigate to the Toolbar and click onto the Setup icon.
2. Click into the section where the assessment is located and locate the assessment topic these need to be linked too.
3. Right click onto the topic and select Properties.
4. Click into the Control tab.
5. In the Automatic Elements/Entries box, click the Trigger button.
6. Highlight the trigger(s) and click OK.
7. Once the trigger(s) is listed in the Automatic/Elements box, highlight them all, and click onto Now (the default setting is Soon, but this will not work).
8. Click OK to save changes.

Once you get these added to the topic, test them out to be sure all options are triggering when the correct score is calculated. Sometimes a user misses a greater than or less than option in the formula which causes math problems.

Linking Triggers

Triggers may be linked to topics, words, easy buttons, or run via the icons.

Link triggers to an easy button

First, you will need to determine which option you would like for the triggers:

1. Should the trigger task selection screen popup so that a user may manually look through the list and select only the triggers they would like to apply to a resident; or
2. Should the attached triggers run automatically and just the ones that apply will then be documented on the resident chart; or
3. Should the attached triggers run, but launch a write screen which allows the user to only chart within the topics which have triggered (such as a nursing admission assessment)?

Option #1

This is a great option for admission care plans. The user can select any triggers which relate to the admitting resident's conditions. This will add a care plan onto the record so that the baseline care plan is developed shortly after admission.

1. Click onto the Setup icon.
2. Navigate to the section of the easy access screen you are wanting to link the triggers too.
3. Double click into the easy access topic.

4. Right click onto an existing easy button, select **Copy**. Right click into a blank space and select **Paste**.
5. Right click into the new button and select **Properties**.
6. Rename the button within the short name.
7. On the **Word Control** tab, remove out anything located in **Go To** box.
8. Back on the **Options** tab, in the **Actions** area, remove anything located there.
9. Click onto Add > Pick Task(s) > Triggers.
10. Find all trigger(s) that should display when the user clicks onto the button. Highlight all triggers.
11. Click **OK.**
12. Place a checkmark in **Name Selection** (if needed) and make sure the **Based On** is set to "On Click."
13. Click **OK** and **OK** again.

Option #2

If you selected this option, then first, you would need to create a trigger task that encompasses all triggers that should run automatically. In addition, only triggers that have setups in the **Write > Automatically Write** can be included to run automatically.

1. Click onto **American Data – ECS** > **Setup** > **Trigger**.
2. Click onto **Tasks**.
3. Click onto **Save** to create a new task.
4. Enter in the name of the task into the **Task Name** box. Click **OK.**
5. Select **Site/Service** as well as **User Group(s)** which should have access to the new task. Click **OK.**
6. Once the task is now located in the Task list, highlight it, and click **Edit**.
7. Click **Add** to select all trigger(s) to be a part of this task.
8. Click **OK** to update the task.
9. Click **OK** when done adding triggers in.

Once the task itself is created, we can now link the task to an easy button. When a user clicks onto the button, it will launch this task and automatically run all triggers and document any which apply to the resident(s).

1. Click onto the **Setup** icon.
2. Navigate to the section of the easy access screen you are wanting to link the triggers too.
3. Double click into the easy access topic.
4. Right click onto an existing easy button, select **Copy**. Right click into a blank space and select **Paste**.
5. Right click into the new button and select **Properties**.
6. Rename the button within the short name.
7. On the **Word Control** tab, remove out anything located in **Go To** box.
8. Back on the **Options** tab, in the **Actions** area, remove anything located there.
9. Click onto **Add** > **Pick Task(s)** > **Trigger Tasks**.

10. Find the newly created trigger task that should run when the user clicks onto the button.
11. Click **OK.**
12. Place a checkmark in **Name Selection** (if needed) and make sure the **Based On** is set to "On Click."
13. Click **OK** and **OK** again.

Option #3

If you selected this option, then first, you would need to create a trigger task that encompasses all triggers that should run. In addition, only triggers that have setups in the **Write > Manual Write** can be included to run and prompt users to document.

1. Click onto **American Data – ECS** > **Setup** > **Trigger**.
2. Click onto **Tasks**.
3. Click onto **Save** to create a new task.
4. Enter in the name of the task into the **Task Name** box. Click **OK.**
5. Select **Site/Service** as well as **User Group(s)** which should have access to the new task. Click **OK.**
6. Once the task is now located in the Task list, highlight it, and click **Edit**.
7. Click **Add** to select all trigger(s) to be a part of this task.
8. Click **OK** to update the task.
9. Click **OK** when done adding triggers in.

Once the task itself is created, we can now link the task to an easy button. When a user clicks onto the button, it will launch this task and load a write trigger screen.

1. Click onto the **Setup** icon.
2. Navigate to the section of the easy access screen you are wanting to link the triggers too.
3. Double click into the easy access topic.
4. Right click onto an existing easy button, select **Copy**. Right click into a blank space and select **Paste**.
5. Right click into the new button and select **Properties**.
6. Rename the button within the short name.
7. On the **Word Control** tab, remove out anything located in **Go To** box.
8. Back on the **Options** tab, in the **Actions** area, remove anything located there.
9. Click onto **Add** > **Pick Task(s)** > **Trigger Tasks**.
10. Find the newly created trigger task that should run when the user clicks onto the button.
11. Click **OK.**
12. Place a checkmark in **Name Selection** (if needed) and make sure the **Based On** is set to "On Click."
13. Click **OK** and **OK** again.

Using the Automatic Icon [Automatic Writing]

This icon is utilized when a user would like to select a trigger(s) to run at one time. This option will only display triggers that have "Automatically Write Words if Triggered" setup on the Write tab of the trigger.

1. To access, click onto the Toolbar and select the **Automatic** icon.
2. Select **Do automatic triggers**.
3. Click **OK**.
4. Select resident name(s). Click **OK**.
5. Select the trigger(s). Hold down the Ctrl key on your keyboard to select multiple.
6. Click **OK** to run the trigger(s).
7. A progress bar will load to indicate that the trigger(s) are being run on the selected name(s). Once finished the progress bar will close. If you would like to view the results, you will need to launch a view screen or report to see the items that may have triggered (such as new care plans).

Using the Triggers Icon [Manual Writing]

This icon is utilized when a user would like to select trigger(s) that should load into a Write Triggered Entries screen. This prompts the user to manually document within any topic(s) that the resident requires documentation within. This option will only display triggers that have "Manually Write Topics if Triggered" setup on the Write tab of the trigger.

1. To access, click onto the Toolbar and select the **Triggers** icon.
2. Select resident name(s). Click **OK.**
3. Select the trigger(s). Hold down the Ctrl key on your keyboard to select multiple.
4. Click **OK** to load the trigger(s).
5. The Triggered Entries screen will load. Utilize instructions below for *Using a Triggered Entries Screen* to navigate.

Using a Triggered Entries Screen

Whether a user manually loads triggers via the Triggers icon, or the screen is launched via an easy button, the below instructions will assist a user in using the Triggered Entries Screen.

1. Once the screen loads, the top right half of the screen is a Write screen, the bottom right half is a view screen, and the left half of the screen is a trigger list. The view screen will display previous charting or relevant information.

Icons in the Trigger Screen	
(Green)	Maximizes the View screen.
(Blue)	Maximizes the Write screen.
Name	Opens the Name Selection screen.

Load	Brings up the information into the Write/View screen allowing the user to work the trigger.
Trigger	Reloads the trigger list or allows the user to select a different set of triggers.
Refresh	Refreshes the screen.

2. Once this screen is initially loaded, the first incomplete topic will display in the write screen.
3. Document the notes by working from left to right and selecting the appropriate words on the screen and adding in free type where needed.
4. When finished documenting on that triggered area, click the next trigger that has a green checkmark. The checkmark next to the trigger previously worked will now turn Red, indicating that it has been completed. To load the new trigger, click the Load icon above the trigger list. This will save all charting in the prior topic and load the new topic.
5. Click the Exit button to return to the Nurse Access screen. If a second user would enter the Admission Assessment, they would then see items without a green checkmark if they have already been completed. As seen below, the user would be presented with all assessments that are not yet completed (signified with a green checkmark) and those which have already been completed will have nothing listed to the left. The user will be unable to load a topic which has already been completed via a trigger screen.