Common Tasks

Common tasks are created to filter the client list. They consist of formulas that include or exclude clients from the list. Common tasks may be linked to view tasks, write tasks, electronic sign tasks, reports, calculating tasks, and calendars. The use of common tasks can greatly decrease the amount of clicks needed to complete a process.

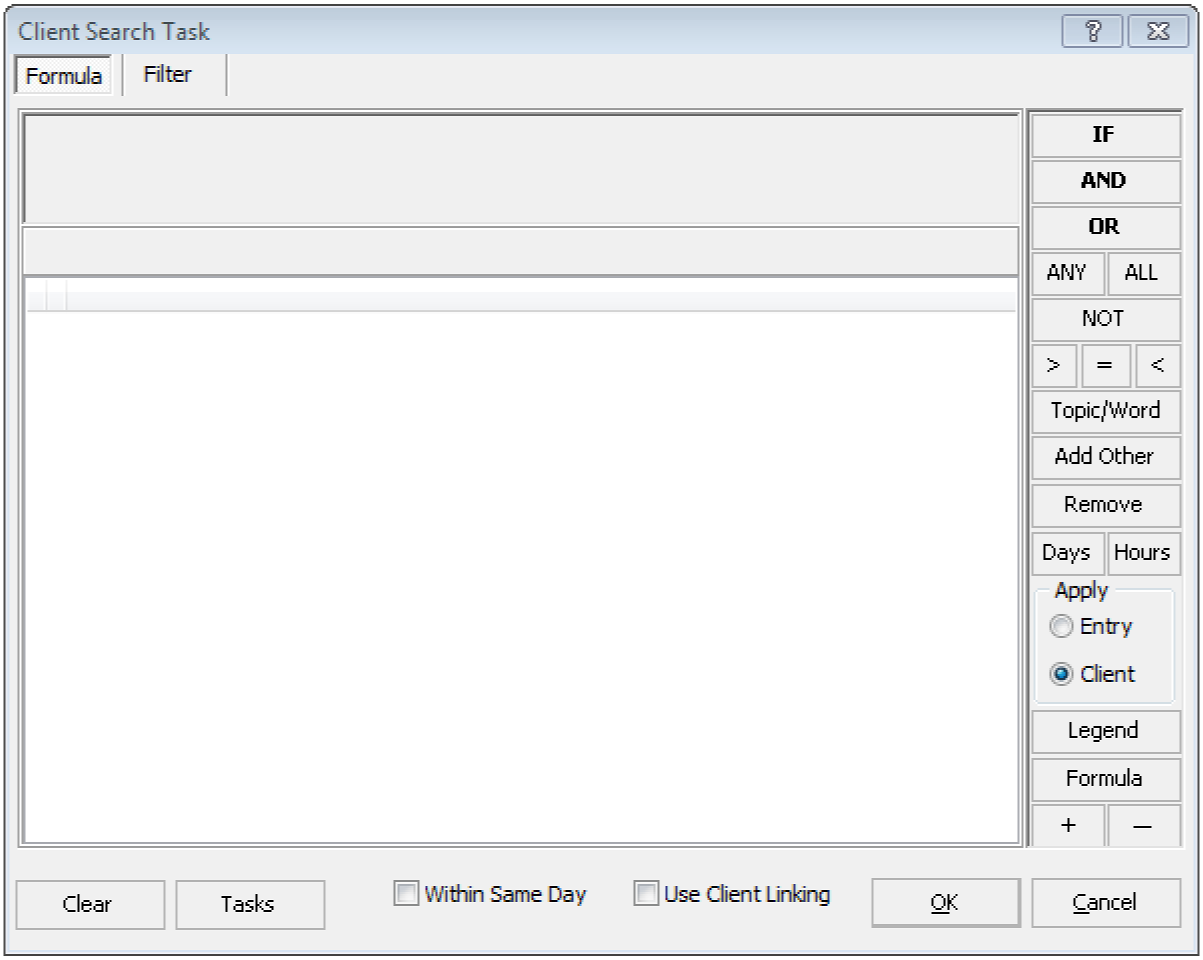
For example, if there is a physician who runs a specific report for rounds, a common task could be used to select just his/her clients prior to running the report.

Common tasks may be created anywhere a Name Selection screen appears.

Create New Common Tasks

1. Click onto the **ID** icon.
2. Click onto **Common**.
3. Navigate to the **Formula** tab.
4. Construct the formula that is to include/exclude clients. Utilize the buttons on the right-hand side to construct the formula.
5. Flip back to the **Filter** tab and make all necessary selections.
6. Click onto **Tasks>Save**.
7. Type the name of the task and click **OK**.
8. Select the desired Site/Service and click **OK**.
9. Select the desired user group(s) and click **OK**.
10. After saving the newly created task, click **Cancel** and **Cancel** again to return to the ID screen.

Formula Tab



Adding a Node

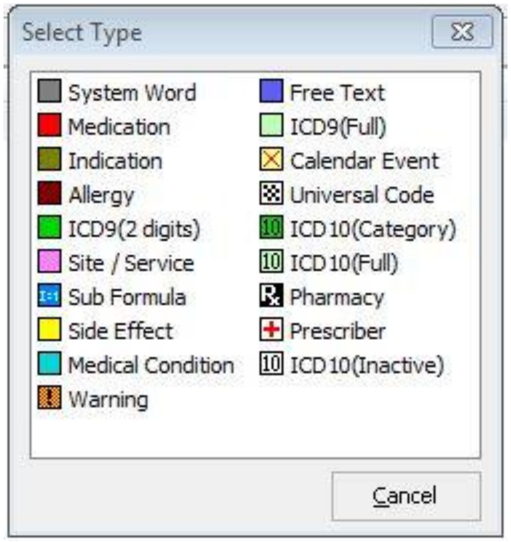
- IF – click onto this button to construct each node to create a formula. IF is used to begin a statement (and a node). A formula may contain multiple statements.
- AND – click onto this button to construct each node to create a formula. AND is used to begin a node, but not a statement. This would be used in combination with an additional node as the user is stating the first node AND this one should apply.
- OR – click onto this button to construct each node to create a formula. OR is used to begin a node, but not a statement. This would be used in combination with an additional node as the user is stating the first node OR this one should apply.

Constructing the Formula

The following options are used in combination with IF, AND, OR. They are used to construct the formula.

- ANY – to be used when the formula should search for ANY OF the defined words/topics to qualify the formula. Example: IF ANY Of "a," "b," "c," is one statement (and one node) then it will qualify if only "a" is found in the record, only "b" is found in the record, or if only "c" is found in the record.

- ALL – to be used when the formula should search for ALL of the defined words/topics to qualify the formula. Example: IF ALL Of "a," "b," and "c" is one statement (and one node) then it will qualify only if all of "a," "b," and "c" are found in the record.
- NOT – to be used to construct a formula that searches for the lack of the defined words/topics.
- >, =, < - to be used to search data that is greater than, less than, or equal to the text/value that is found within the defined words/topics. The user will be presented with additional options when utilizing any of these, which include: text after word, times used, and days used. The user will then identify the number of times.
- Topic/Word – to be used when defining the words/topics to be searched within the selected nodes.
- Add Other – to be used to add something other than a word or topic into a formula. Common choices include calendar event, free text, medication, and sub formula. The following choices are available:



  - System Word – adds another topic or word, the same as the Topic/Word button.
  - Medication – used to add a medication or medication category from the Medi-Span formulary. If the user is searching for a particular medication, the Search In must be set to Rx data.
  - Indication – used to add an indication from the Medi-Span formulary. If the user is searching for a particular indication, the Search In must be set to Rx data.
  - Allergy – used to add an allergy from the Medi-Span formulary. If the user is searching for a particular allergy, the Search In must be set to Rx data.
  - Site/Service – used to specify the Site/Service of words/topics found during the formula search.
  - Sub Formula – links another formula into a node of the current formula. Sub Formulas are used frequently within the CNA Access module.
  - Side Effect – used to add a side effect from the Medi-Span formulary. If the user is searching for a particular side effect, the Search In must be set to Rx data.

- **Medical Condition** – used to add a medical condition from the Medi-Span formulary. If the user is searching for a particular medical condition, the Search In must be set to Rx data.
- **Warning** – used to add in Medi-Span interactions (e.g. Drug to Drug) to the formula.
- **Free Text** – used to search for free typed text in entries.
- **Calendar Event** – searches the calendar instead of the entry for the defined words/topics.
- **ICD 10 (Category)** – used to add ICD10 diagnoses or categories from the Medi-Span formulary.
- **ICD 10 (Full)** – used to add specific ICD10 diagnosis codes from the Medi-Span formulary.
- **Pharmacy** – used to search for a Pharmacy within Script entries.
- **Prescriber** – used to search for a Prescriber within Script entries.
- **ICD 10 (Inactive)** – used to search for ICD10 codes that are no longer active codes, but are potentially still found within entries.

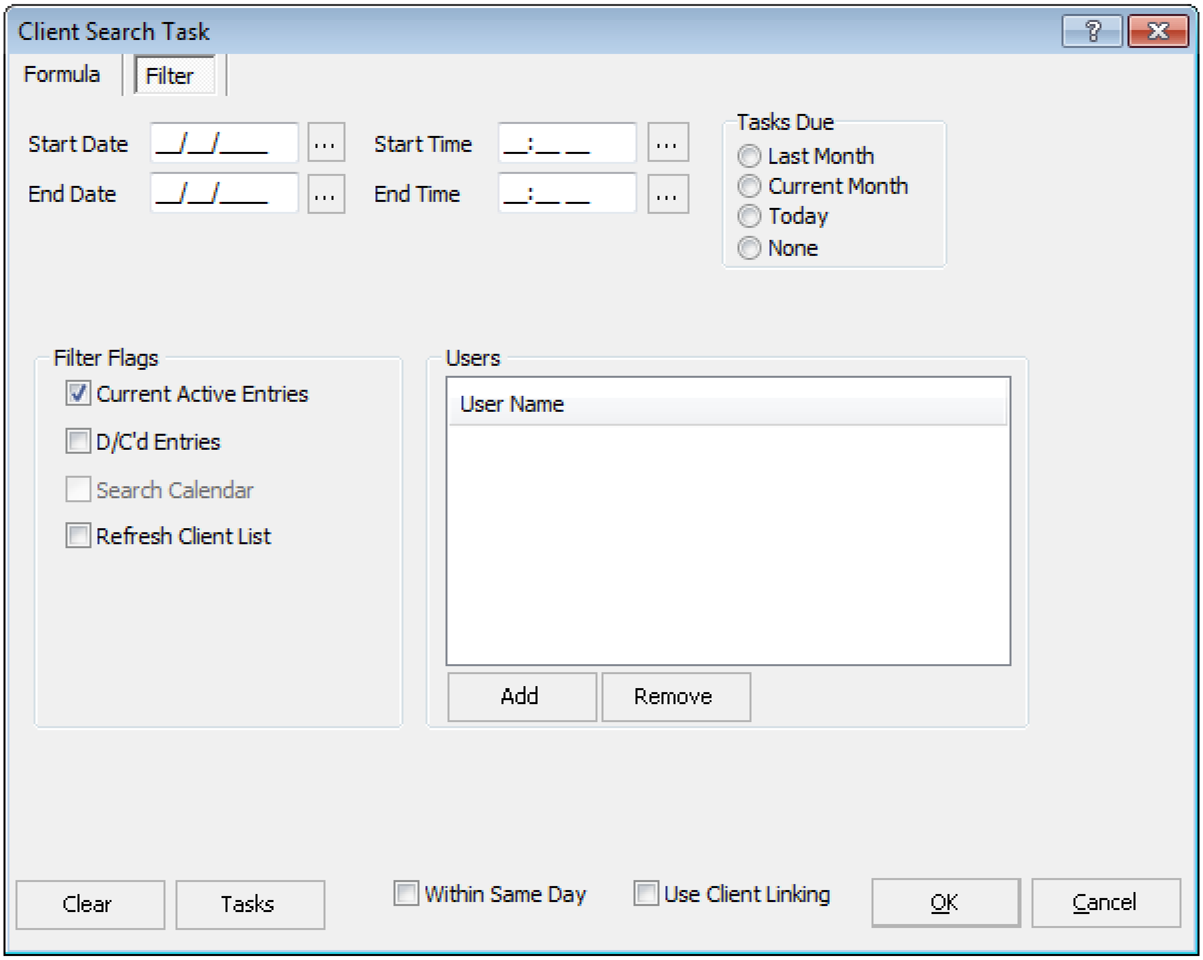
Apply To

- **Entry** – used when the system is to search only within an entry for the information in the formula. When using this option, all words to be searched must be located within the same entry.
- **Client** – used when the system is to search the entire client's chart for the information in the formula.

Additional Options

- **Remove** – used to remove selected (highlighted) information in the nodes area. This may include an entire node or a portion of the node.
- **Days** – used to define a look back period for the node.
- **Hours** – used to define a look back period for the node.
- **Legend** – used to see what the colors in the formula represent.
- **Formula** – used to open an already existing formula. This allows the user to access other formulas without having to close and go back into the formula screen.
- **[+, -]** – click to open or close all of the nodes.

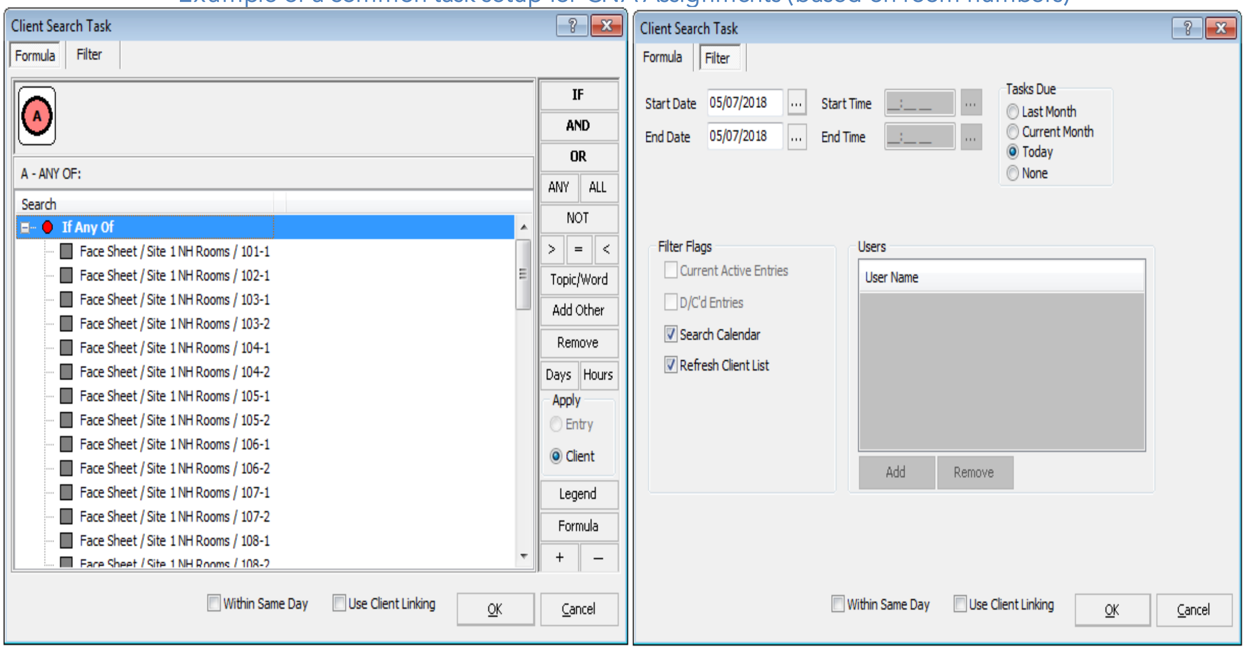
Filter Tab



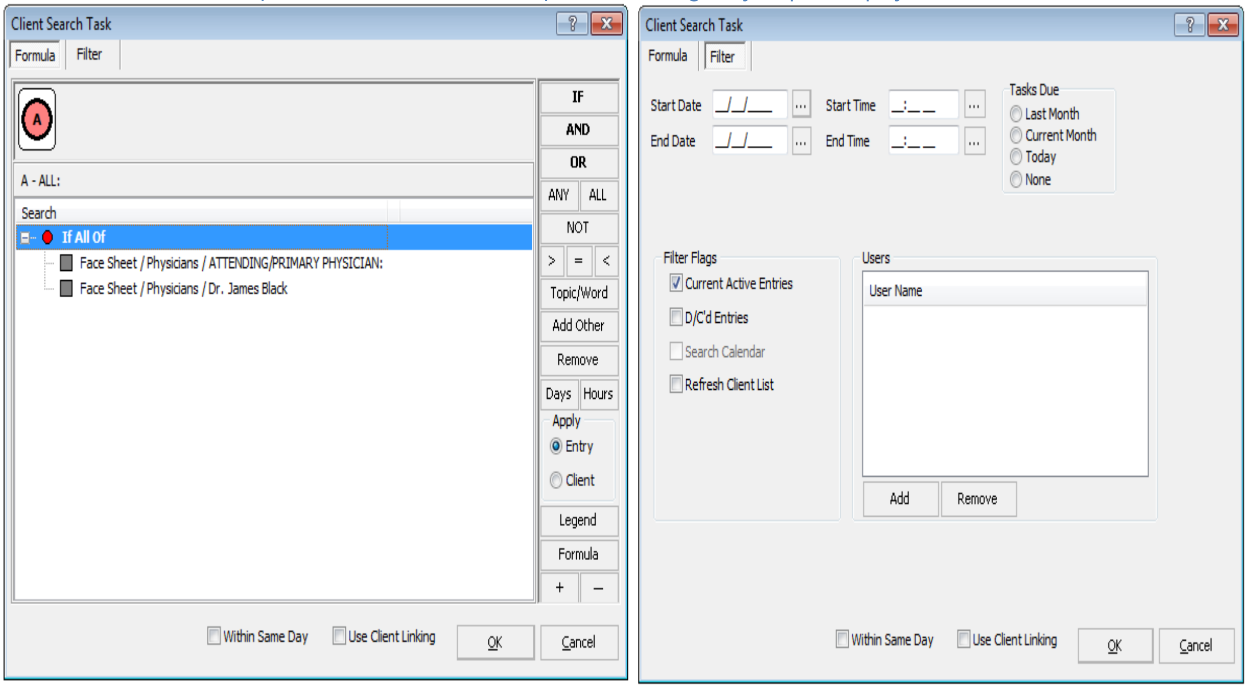
- Start/End Date – if a specific start/end date is entered, the common task will only search during that date range to find clients to include/exclude. Typically start/end date are left blank if building a task
- Start/End Time – if a specific start/end time is entered, the common task will only search during that time frame to find clients to include/exclude. Typically start/end time are left blank if building a task.
- Tasks Due – if any of the options below are selected, the task will automatically fill in the start/end date appropriately as the common task is selected and run. An example of when this might be saved within a task is when wanting to see any residents who are in specific room numbers as of today's date. The common task will then always look at the calendar for the most up to date room number and assure that only those within the selected room numbers are included within the selection.
  - Last Month
  - Current Month
  - Today
  - None

- **Current Active Entries** – will search current active entries to determine if a client should be included or excluded.
- **D/C'd Entries** – will search discontinued entries to determine if a client should be included or excluded.
- **Search Calendar** – will search the calendar for entries to determine if a client should be included or excluded.
- **Refresh Client List** – will refresh the client list, removing the previously selected clients and returning to the users default settings.
- **Users** – will search for entries made by only the user(s) included within the common task setup. Typically this is not utilized when creating a task.

Example of a common task setup for CNA Assignments (based on room numbers)



Example of a common task setup for including only a specific physician's clients



Common Task Additional Options

- **Clear** – will clear out anything that has been built thus far within the Formula screen.
- **Tasks** – allows the user to save new tasks, edit/rename existing tasks, or delete existing tasks.
- **Within Same Day** – placing a checkmark here requires that all the information in the formula occurs on the same day.
- **Use Client Linking** – if two residents are "linked" together (typically to produce one bill for two different residents), both names will pull to the common task if at least one of the client's meets the criteria.

Edit Existing Common Task

1. Click onto the **ID** icon.
2. Click onto **Common**.
3. Click onto the **Tasks** button.
4. Highlight an existing task and select one of the following options to make changes: **Delete**, **Rename**, **Edit**, or **Site/Group**.
5. Once any adjustments have been made, click **OK** to save changes or **Cancel** to close out of the Common Task screen.

Provide User Group Rights

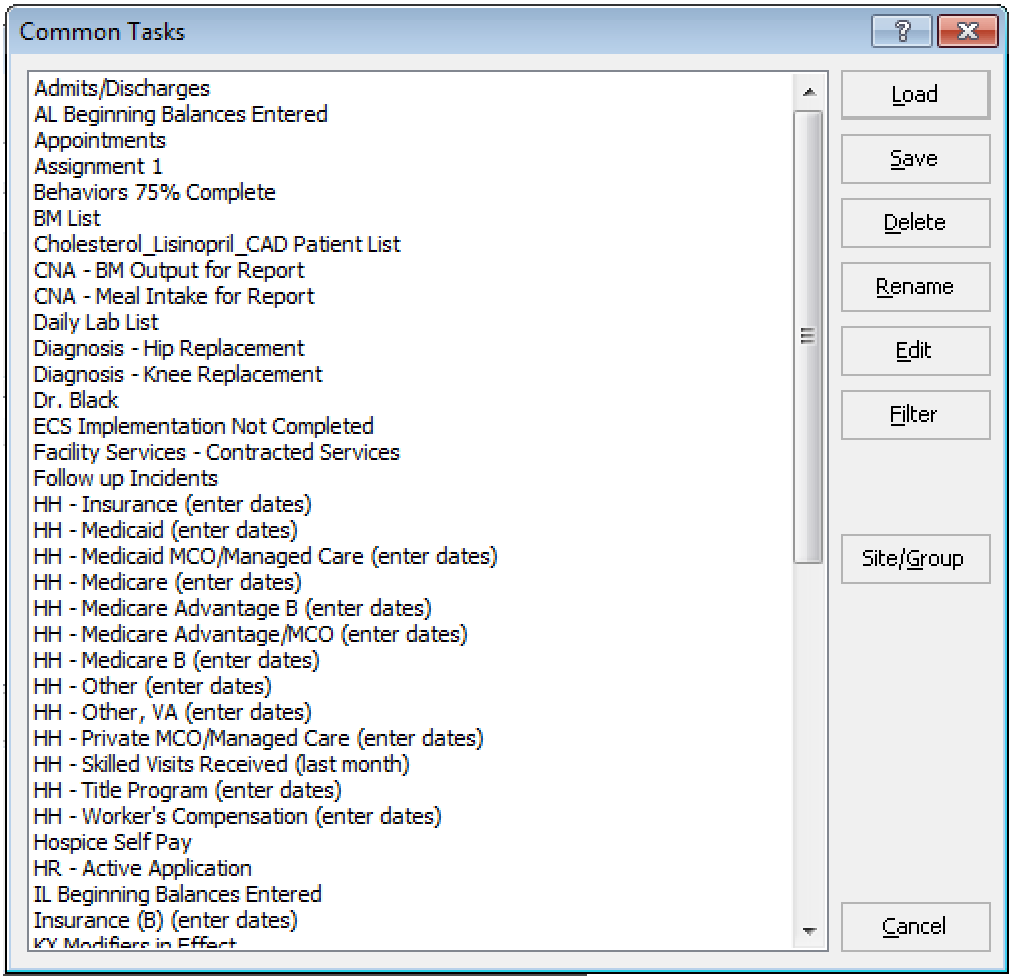
1. Navigate to **American Data-ECS>Setup>Security>User Group**.
2. Click into the Properties of the user group who needs access to loading common tasks.
3. Click the arrow to the left of **Task Security** and then **Common Task**.

4. Click the box to the left of **Load** until it displays as a green checkbox, which gives the user group access to load common tasks.

Run a Common Task

A common task may be linked into an existing task (instructions below) or may be loaded directly within the ID screen or a Name Selection Screen.

1. Click onto **Common**.
2. Click onto the **Tasks** button.
3. Highlight a common task, and click **Load**.
4. Click **OK** to run the common task on the list of names displaying in the Name Selection screen.



Linking to Other Areas in ECS

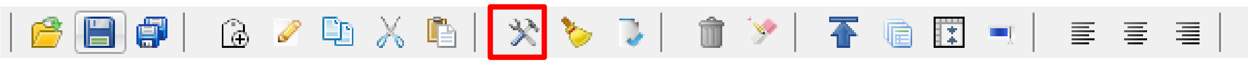
Common tasks may be linked to the following areas within ECS.

- View Tasks
- Write Tasks
- Reports
- Financial Reports
- Graph Reports
- Calendar Tasks
- Scheduler Tasks
- Electronic Sign Tasks
- Electronic Cosign Tasks
- Financial Calculate Tasks
- Financial Forms
- Electronic Claim File Tasks
- User Groups
- RUG Forecast Tasks
- Automatic Tasks
- Sign Backup Tasks

Below are a few examples of how to link common tasks into Reports, Financial Calculation Tasks, User Groups, as well as Electronic Sign Tasks.

Reports

1. Go to **American Data-ECS>Setup>Report>Report Maker**.
2. Open up the report needing to add a common task onto it.
3. Click into the report Options.



4. Click the picklist box to the right of Common and select the appropriate task.
    a. Click the trash can symbol to the right of Common if needing to clear out the common task currently linked.
5. Click onto the save icon to save the changes to the report.

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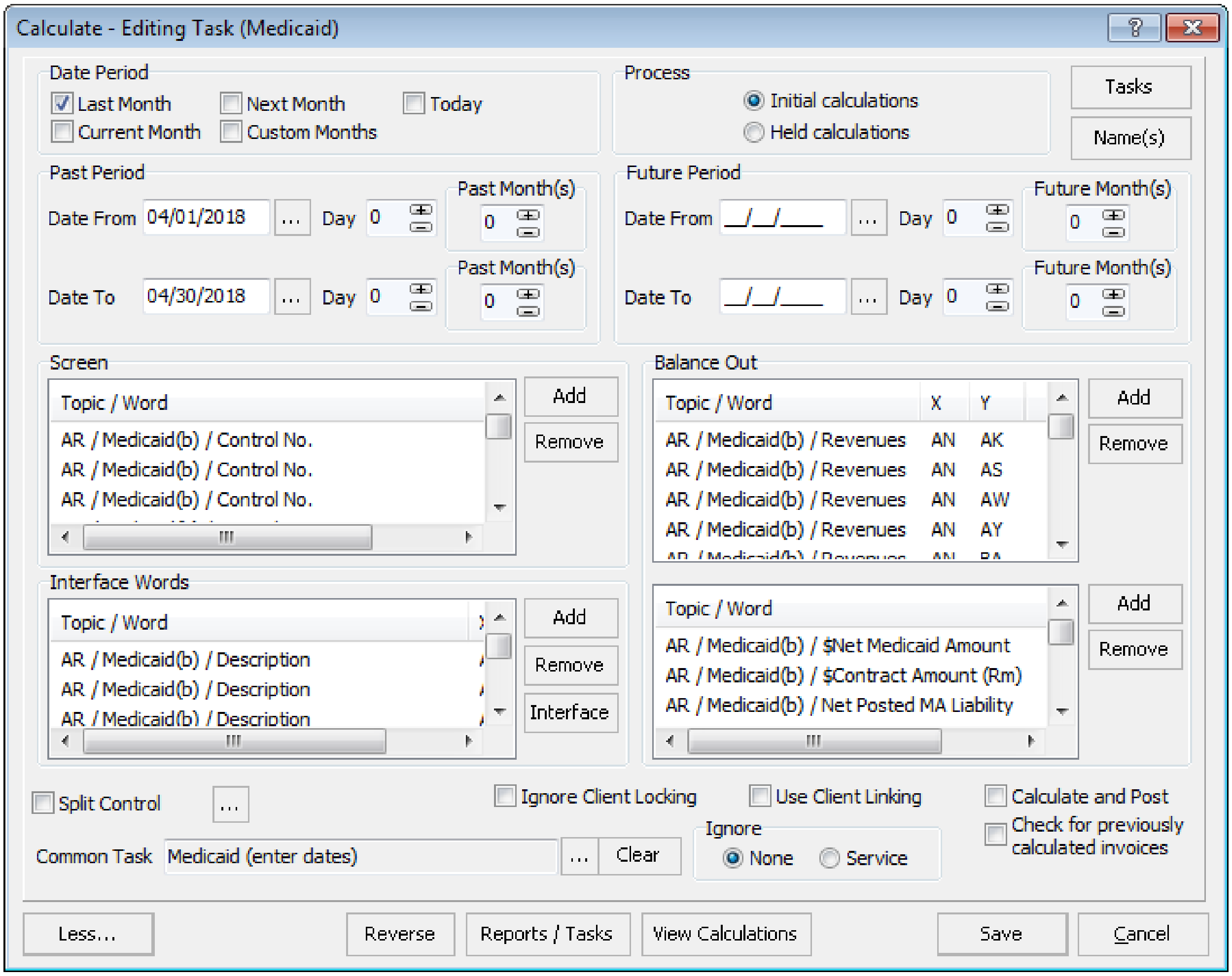
Financial Calculation Tasks

1. Click onto the red **Calculate** icon.
2. Click onto **Tasks**, select the task needing the common task added onto it and click **Edit.**
3. Click **More…**
4. In the lower left, use the picklist box to the right of Common Task to add in the appropriate task.
    a. Click Clear to remove the common task currently linked.

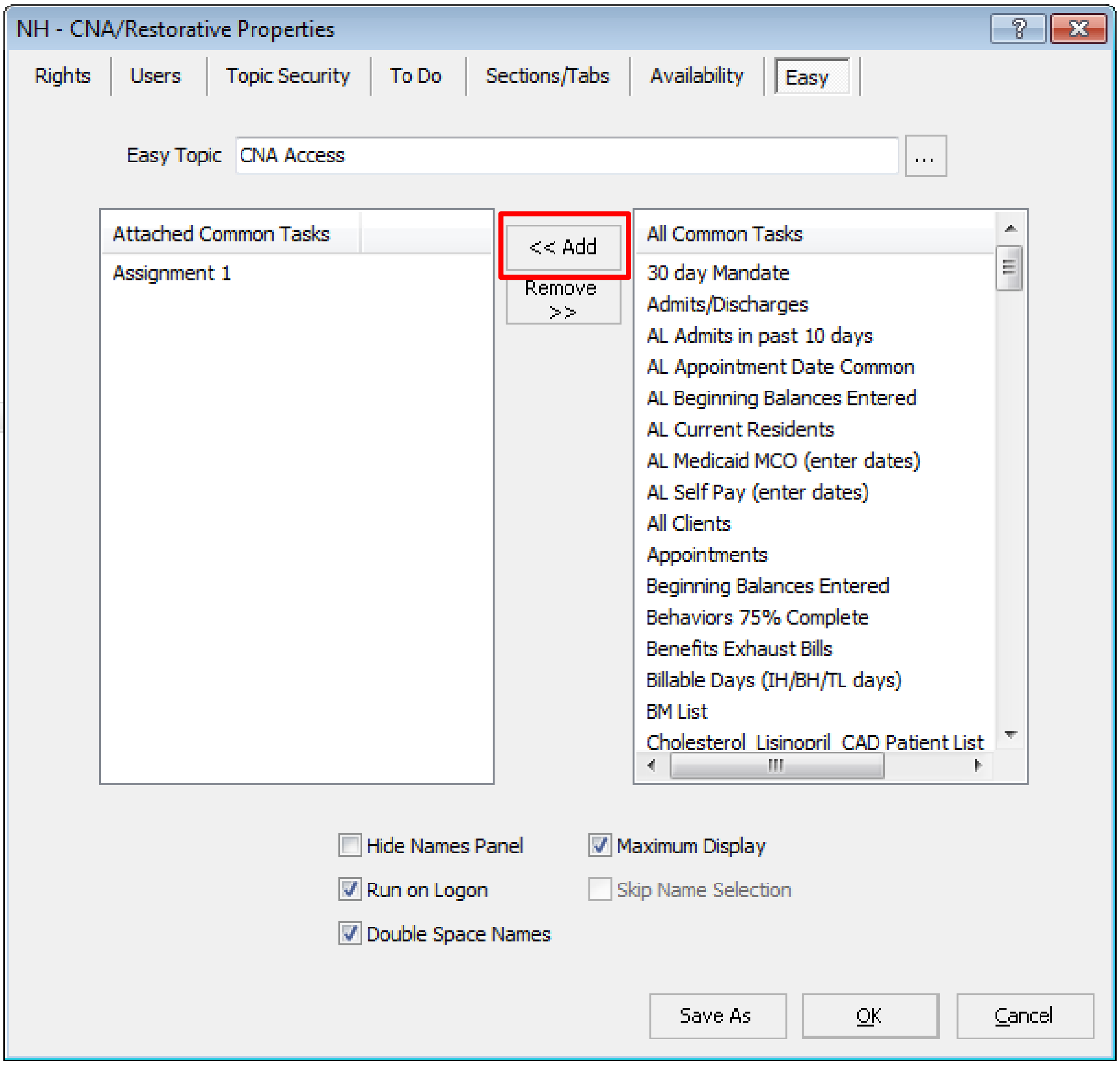


5. Click **Save** to save changes.
6. Click **Cancel** to close out of the calculate task setup.

User Groups

To provide a user group with a list of common tasks upon login, follow the instructions here. This may be used if the CNA's have several different assignments and the facility would like them to select their specific assignment upon login. This then filters their list to only display the residents whom are relevant to that particular assignment.

1. Navigate to American Data-ECS>Setup>Security>User Group.
2. Click into the Properties of the user group who needs a list of common tasks to select from.
3. Navigate to the Easy tab.
4. Select any common tasks on the right hand side and use << Add to bring them over as an Attached Common Task. Continue to click Add until all necessary common tasks are listed on the left hand side of the screen.
5. Click OK to save changes.



Electronic Sign Task

1. Click onto the **Sign** icon.
2. Click onto **Tasks**.
3. Select the task needing a common task linked to it and select **Edit**.
4. To the right of Common Task, click onto **Tasks**.
5. Find the common task on the right hand side of the screen and click **<< Add** to bring it over to the left hand side of the screen.
6. Click OK.
7. Click onto the Common Task dropdown and select the common task to be attached.
    a. If needing to remove a common task click into the Tasks button; find the task located on the left hand side and use **Remove >>** to bring it over to the right hand side. Click **OK** and **OK** to save changes.
8. Click **OK** to save changes made.