

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

Client Search Task	8 23
Formula Filter	
	IF
	AND
	OR
	ANY ALL
	NOT
	> = <
	Topic/Word
	Add Other
	Remove
	Days Hours
	 Apply Entry
	Client
	Legend
	Formula
	+ -
Clear Tasks Within Same Day Use Client Linking OK	<u>C</u> ancel

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.

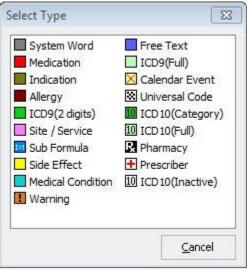
Constructing the Formula

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.
- ICD10 (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

Client Search Task	? 💌
Formula Filter	
Start Date _/_/ Start Time Tasks Due End Date _/_/ End Time Current Month O Current Month O Current Month Today None	
Filter Flags Current Active Entries D/C'd Entries Search Calendar Refresh Client List	
Add Remove	
Clear Tasks Within Same Day Use Client Linking OK	<u>C</u> ancel

- 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.
 - \circ Last Month
 - Current Month
 - Today
 - o 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.

Client Search Task	? - ×	Client Search Task	-?- X
Formula Filter		Formula Filter	
A - ANY OF: Search Face Sheet / Site 1 NH Rooms / 101-1 Face Sheet / Site 1 NH Rooms / 102-1 Face Sheet / Site 1 NH Rooms / 103-1 Face Sheet / Site 1 NH Rooms / 103-2 Face Sheet / Site 1 NH Rooms / 103-2 Face Sheet / Site 1 NH Rooms / 104-2 Face Sheet / Site 1 NH Rooms / 105-2 Face Sheet / Site 1 NH Rooms / 107-2 Face Sheet / Site 1 NH Rooms / 107-1 Face Sheet / Site 1 NH Rooms / 107-2 Face Sheet / Site 1 NH Rooms / 108-1 Face Sheet	IF AND OR ANY ALL NOT > = < Topic/Word Add Other Remove Days Hours Apply © Entry @ Client Legend Formula + _	Start Date 05/07/2018 Start Time Tasks Due Last Month End Date 05/07/2018 End Time Current Month 0 Current Month 0 Today None Filter Flags Current Active Entries 0 //Cd Entries V Search Calendar V Refresh Client List User Name Add Remove	
Within Same Day Use Client Linking QK	<u>C</u> ancel	Within Same Day Use Client Linking OK	<u>C</u> ancel

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



1	-	
Client Search Task	? 🔀	Client Search Task
Formula Filter		Formula Filter
A - ALL: Search - • If All Of Face Sheet / Physicians / ATTENDING/PRIMARY PHYSICIAN: Face Sheet / Physicians / Dr. James Black	IF AND OR ANY ALL NOT > = < Topic/Word Add Other Remove Days Hours Apply © Entry © Client Legend Formula + —	Start Date
Within Same Day Use Client Linking QK	<u>C</u> ancel	Within Same Day Use Client Linking OK Cancel
Within Same Day Use Client Linking QK		m wit

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 **Cance** 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.

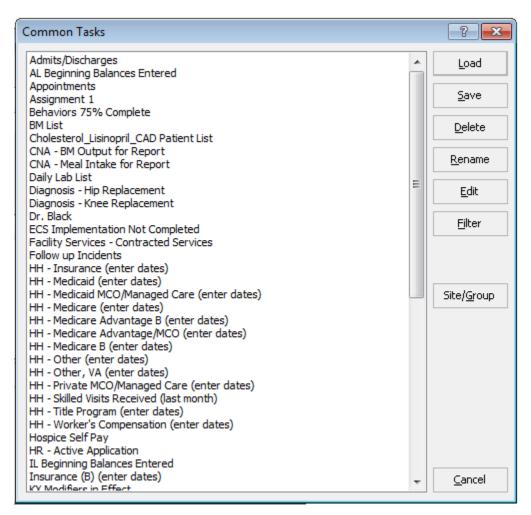


4. Click the box to the left of **Load** until it displays as a green checkbox, which gives the user group access to load common tasks.

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.



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.

Calculate - Editing Task (Medicaid)	? 💌
Date Period ULast Month Next Month Today Current Month Custom Months	Process Tasks Initial calculations Name(s)
Past Period Past Month(s Date From 04/01/2018 Day 0 Past Month(s	Date From _/_/ Day 0 0 0
Date To 04/30/2018 Day 0 🖨 0 🖨	Date To _/_/ Day 0 0 0
AR / Medicaid(b) / Control No. AR / Medicaid(b) / Control No. AR / Medicaid(b) / Control No.	dd Topic / Word X Y Add nove AR / Medicaid(b) / Revenues AN AK AR / Medicaid(b) / Revenues AN AS AR / Medicaid(b) / Revenues AN AS AR / Medicaid(b) / Revenues AN AS AR / Medicaid(b) / Revenues AN AV AR / Medicaid(b) / Revenues AN AV AR / Medicaid(b) / Revenues AN AY AD / Medicaid(b) / Revenues AN PA
AR / Medicaid(b) / Description AR / Medicaid(b) / Description	dd hove AR / Medicaid(b) / \$Net Medicaid Amount AR / Medicaid(b) / \$Contract Amount (Rm) AR / Medicaid(b) / Net Posted MA Liability IIII
	e Client Locking Use Client Linking Calculate and Post Ignore Check for previously Clear None Service
Less Reverse Reports /	Tasks View Calculations Save Cancel

- 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.

NH - CNA/Restorative Properties	? 💌
Rights Users Topic Security To Do	Sections/Tabs Availability Easy
Easy Topic CNA Access	
Attached Common Tasks	All Common Tasks
Assignment 1	Remove Admite Discharges
	AL Admits in past 10 days
	AL Appointment Date Common AL Beginning Balances Entered
	AL Current Residents
	AL Medicaid MCO (enter dates) AL Self Pay (enter dates)
	All Clients
	Appointments
	Beginning Balances Entered Behaviors 75% Complete
	Benefits Exhaust Bills
	Billable Days (IH/BH/TL days) BM List
	Cholesterol Lisinooril CAD Patient List
Hide Names	Panel 📝 Maximum Display
Run on Logo	n Skip Name Selection
✓ Double Space	e Names
	Save As <u>OK</u> <u>C</u> ancel



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.

k Name: Meds 0700-1030		Site/Group	
ntries		Time	
Topics/Words X Y		Topics/Words Lines	x 🔺
		Physician Orders / Life Activity/FYI / FYI (MAR)	AH
		Physician Orders / Treatments / FYI	AV
		MAR/TAR / Nursing Orders (TAR) / FYI	AI
		,	AM
			AN
		,	AM
		,	AM AN -
			Alv 4
	elete 🙈 😽		
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-		Exception: MAR/TAR / Med Exceptions /All	
end Exception Report	CoSignature Required	Exception: MAR/TAR / Med Exceptions /All	
end Exception Report	CoSignature Required User Name Select Common Tasks	Exception: MAR/TAR / Med Exceptions /All Common Task: NONE Tasks All Common Tasks	(
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