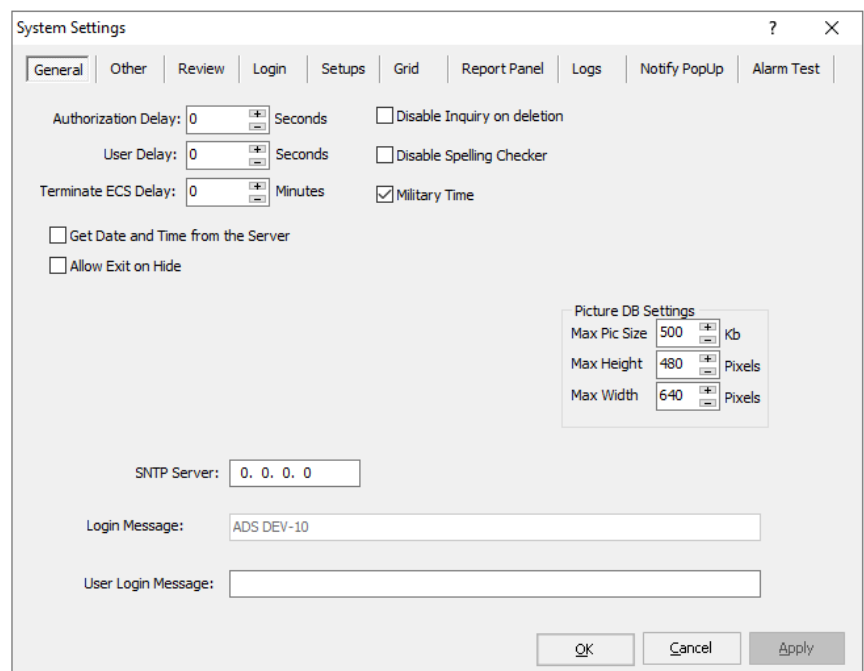# System and Site Settings

In ECS, click **American Data – ECS** > **Help** > **Client Sign On** and check out the **System Settings** video located in the System Supervisor category.

System Settings

General Tab

There are a few system settings you will need to think about and address early in the implementation process. System settings can be accessed within ECS by following the path **American Data – ECS > Setup > Settings > System**. The General tab allows the system administrator to customize server settings, picture settings, and various other options.

Authorization Delay

This setting controls the length of idle time (in seconds) before ECS "hides". ECS automatically locks all other users out of the system on the computer that is idle. Only the user who was signed in last can unlock ECS. When the user unlocks ECS, they are taken back to the place they left off in the system. When the delays are set to zero, this means that the delays are not set (e.g. ECS will not time out). You can set up the system to timeout after a certain length of inactivity. In System Settings, enter a number (in seconds) in the Authorization Delay field.

User Delay

This is like the Authorization Delay, but the difference is that the User Delay is activated when the user signs into ECS with a "Delay Login" password. It is intended to be used to shut out access to ECS after a very short amount of time. The "User Delay" would normally be set to a time limit much shorter than the "Authorization Delay." The "Delay Login" is only applied in sessions where the "Delay Login" in the "Authorization Screen" was utilized. In System Settings, enter a number (in seconds) in the User Delay field.

Terminate ECS Delay
This setting allows you to set up ECS to terminate a session if a user has been inactive (idle) for a certain number of minutes. Note that if the user had documentation in progress, anything they did not save would be lost and need to be re-entered as a late entry.

An example of this is when a staff member does not log out of ECS, and then leaves for the day. ECS will terminate their session after a certain number of minutes so other staff members can log into ECS. Enter a delay in minutes by typing a number in the box or using the +/- buttons.

Get Date and Time from the Server
If this is selected, every time a user logs in to ECS, the system checks the date and time of the server and uses it to track entries in ECS. American Data recommends this setting to be selected.

Allow Exit on Hide
This feature allows a user to exit someone out of ECS who's session has timed out. When a user's session is timed out, it locks ECS and does not allow anyone else to log in. This would present an **Exit** button on the timed-out screen, allowing someone to boot the user out of their session. Once the session is logged out, ECS is now available for a user to log in. This feature will also exit users out of any of the following features which they may have "locked": MDS, cash receipts screen, and financial calculating screen. There is not a way to track/restrict who clicks the Exit button on the ECS Authorization Screen. Be sure that if you enable this feature, all users are educated so no one is closing out sessions of users that potentially have unsaved work.

Disable Inquiry on deletion
When attempting to delete a word, the system checks to see if the word has been used. The Disable Inquiry on deletion setting should always be left unchecked, so words that have been used cannot be deleted. Deleting used words can cause major issues when viewing charting.

Disable Spelling Checker
Spelling Checker is a feature that may be utilized when documenting in ECS. When a user types information into a record, ECS checks the spelling of words. If ECS's dictionary does not include a word that is typed, the word appears with a red underline. When "Disable Spelling Checker" is checked ECS does not underline misspelled words.

Military vs. Standard Time
By default, the system is set to standard time; however, military time is strongly encouraged as a best practice (e.g., for Nurse's Notes and medication pass). To change the system to military time, select the **Military Time** checkbox in System Settings.

Login Message
Information typed in this area appears as a message on the ECS Authorization screen for all users to see when they sign into the system. This field can only be changed by American Data staff. Please contact American Data support staff if you're like to fill out this field.
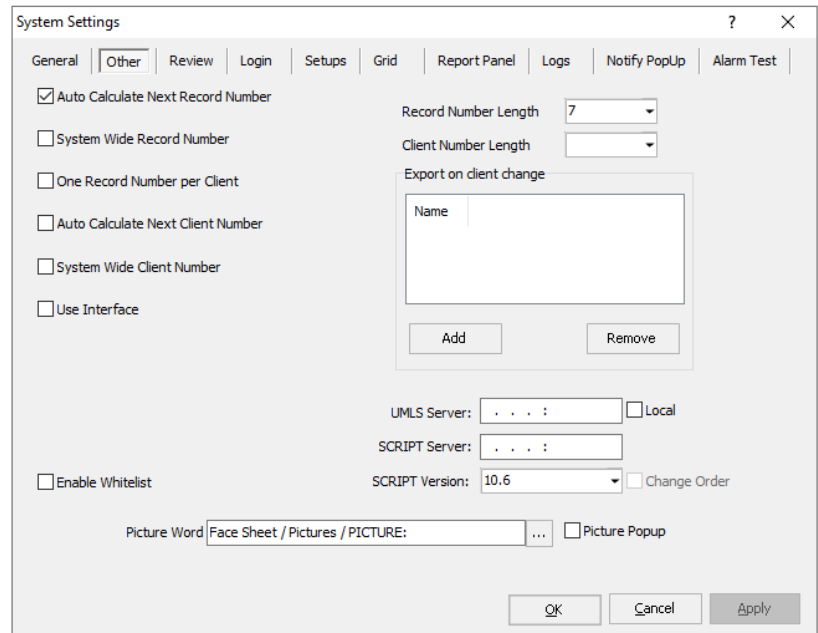
User Login Message

You can use this field to add a message to the ECS Authorization screen. For example, system administrators can display a login message to users "The system should only be access by authorized users". There is a 255-character limit.

System Settings – Other Tab

The Other tab in system settings area allows the system administrator to set default functions in client records, establish interface settings, and configure other miscellaneous system settings.

Auto Calculate Next Record Number/Client Number

Placing a check next to theses selections enables the auto-calculation feature in ECS. Placing a checkmark next to this selection causes the program to auto calculate the next Admission Number in the "Demographics" screen and next record number in the "Locate" screen, using the next successive number.

System Wide Record Number/Client Number

These are system-wide settings that only function when there are multiple sites on the same database. This will not affect the services. This allows the same MRN and/or client number to follow a client from site to site. The Auto Calculate Next Record Number and Auto Calculate Next Client Number need to be selected if the facilities want to auto-calculate the MRN and/or client number. If these options are not selected, then the system will assume that different numbers will be assigned when the client(s) move from site to site.

One Record Number per Client

Placing a checkmark in One Record Number per Client causes the record number to remain the same for the client regardless of site/service combinations and changes. If the facility would like for the client to maintain the same record number within the entire database, this option should be checked. The user will still be able to manually override a record number if they are wanting a different one on one of the client's stays.

Use Interface

Interface files may be setup in the system to export data to an ASCII file. If "live" interface is desired place a check here. During "Live Interface" an interface file is immediately produced when information is entered in the system.

Record Number Length
This area allows the system administrator to format the Record number.

Client Number Length
This area allows the system administrator to format the Client number.
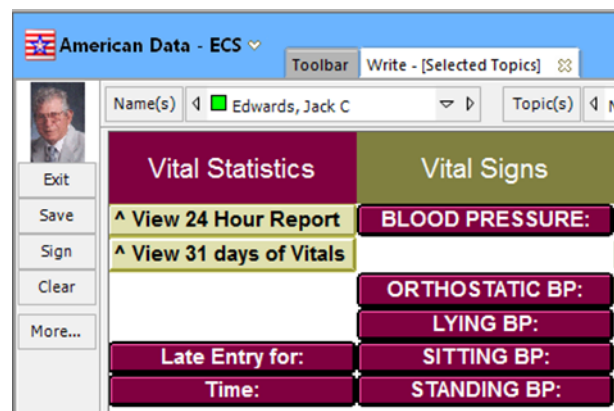
Export on Client Change
This is used for HL7 interfacing of demographic information. Click Add to link a particular export file. When this is defined all demographic changes/updates send the data out of ECS.

UMLS Server IP
Enter the IP of the server with UMLS (Unified Medical Language System.)

Picture Word
Pictures may be documented in a record. When pictures are utilized as a means of identifying a client, they may be linked to the documenting screen. When pictures are linked to the documenting screen, the photo appears when the record is accessed. To link pictures to the documenting screen, click on the pick list box and locate the word and click OK to save your selection.

Picture Popup
When "Picture Popup" is selected, the photo is magnified when the user accesses the documenting screen.

System Settings - Review tab
The Review tab in the System Settings area allows the system administrator to define View screen options.
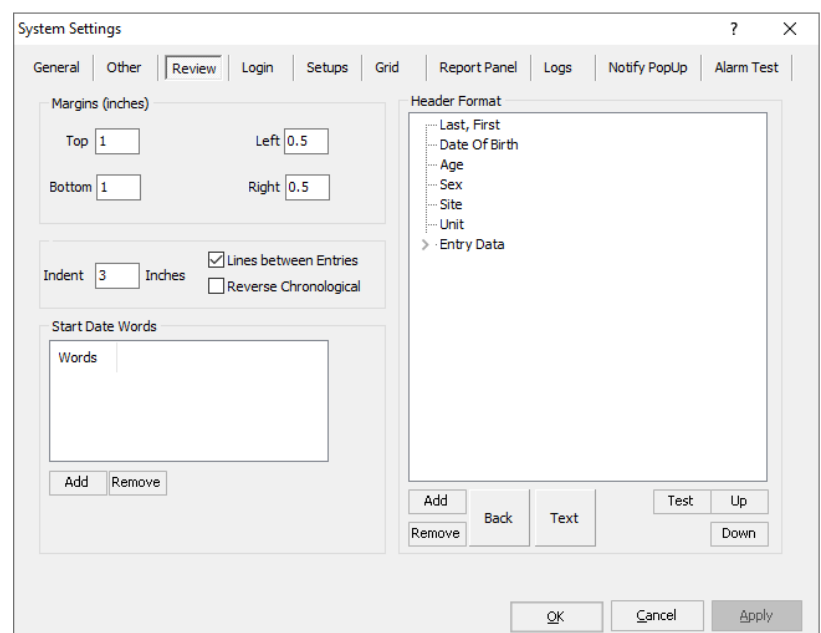
Margins
American Data recommends leaving the default margin settings. The margin settings control the size of ECS on the screen.

Indentation
This setting controls the amount of indentation on the View Entries screen (the space between question words and canned phrases). American Data recommends leaving the default setting of 3 inches.

Line Between Entries

This setting is a system wide setting that places a line between each entry in a view screen.

Reverse Chronological
This checkmark will set the default for all view screens to have the Reverse Chronological option checked on the Look tab. This feature will be overridden by any tasks that have been saved and do not have this checked within the task.

Start Date Words
There is an option to default view screens to the client's most recent stay. If this option is being utilized this area must be defined. The "Start Date Words" would include those words that define the beginning of a new stay. Examples may include "ADMISSION DATE" and "READMISSION DATE". Click Add to add the words to the list view. Click Remove to remove highlighted words from the list.

Header Format

Header Preview						
Last, First	Date Of Birth	Age	Sex	Site	Unit	Entry Data

This area controls the presence of information that appears with the client's name at the top of the screen when viewing information. You can add as many items as you need to, from both the ID-Demographics and from Entries. The Header Format box is designed like a tree. Demographics items are listed individually, and Entries may be grouped together. You can expand areas of the tree, if present, by clicking on the + to the left of Entry Data.
1. Click Add under the Header Format field.
    a. To add *Demographic items*, click the drop-down arrow for the Select Demographics field. Select the Demographic field you would like to display.
    b. To add *Entries*, click the pick list box next to Select Words, and select the word(s) you want to list (e.g., Room, Physician, Code, Status, Admission Date).
2. All selected items will be added to the tree. Use the Up/Down buttons to arrange them as desired.

Customize headings in a View screen
You can customize the heading in the View screen to have different background colors and different word colors. This can be useful for highlighting important information so that it is more apparent in the View screen.

To change the color of the entire header, highlight the first item in the Header Format tree. Click **Back** located under the Header Format area. A color selection screen appears. Select a color to be set as the general background color for the header. If a different background color is desired for individual words, those words can also be highlighted (one at a time) and changed. To change the color of the font, highlight a part of the Header Format tree and click **Text**. On the Review tab in System Settings, click **Test** to see a preview of the header before saving your changes.

System Settings – Login Tab

Require Password AND Fingerprint Authorization for Login
Select this checkbox to require both a login name and fingerprint authorization when logging in to ECS. This makes for tighter security.

Require Login Name
Select this checkbox to require a login name in addition to a password when logging in to ECS. Login names are required for ECS10.

Use User Log
Select this checkbox to track all users, and which charts they have accessed. We recommend selecting these settings.

Do not allow User Name in Login Name or Password
When this is checked the user may not use their first or last name as an ECS password or user login.

Passwords Expire in __ days
Select this checkbox to require password changes and define how many days a password is good for (e.g., 90 days). In addition, select the Password Expires checkbox next to each user in User Setup.
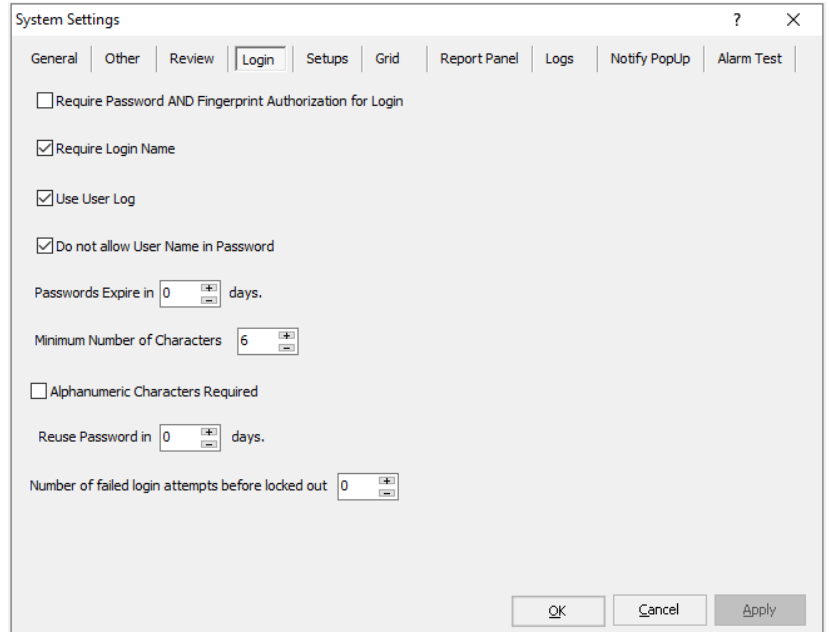
Minimum Number of Characters
To establish a higher standard of security set a minimum number of characters for user passwords. When inputting passwords, if the chosen password is below the established number, users will get a warning which prevents them from making the change and they will be prompted to create a password of appropriate length. This occurs both for system supervisors changing passwords through American Data - ECS > Setup > Users and for users that establish their password upon login.

Alphanumeric Characters Required
Select this checkbox if the password must contain a combination of alphabetic and numeric characters.

Reuse Password in __ days
Set how soon a previous password may be reused. Setting the value to 0 will turn off the function, allowing previous passwords to be used within the same day.
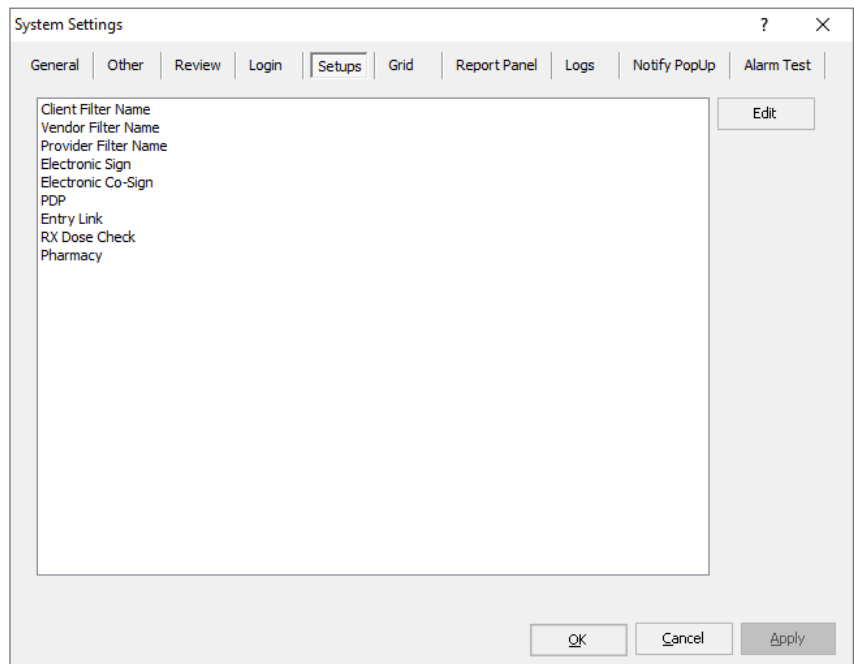
Number of failed login attempts before locked out

Use this setting to set how many failed login attempts are allowed before a user is locked out of the system. Once a user is locked out of the system, someone with the rights to American Data - ECS > Setup Users can unlock the system for the user to log in again. To do so: Clear the Account is locked due to too many invalid login attempts checkbox in the User's account under the Password tab.

System Settings - Setups tab

The System Settings Setups tab is where the system administrator may customize pick lists located throughout the system. In nursing facilities users are most familiar with the Client filters Location, Facility, Floor, Unit, Assign, and Service. Unit is often used to list the various units located throughout the campus. This feature allows for the customization of this filter. If your facility does not use the term "Unit" and instead uses the term "Neighborhood," the system administrator can make that change.

1. Select the pick lists to be modified (Client Filter Name, Vendor Filter Name, Provider Filter Name, Electronic Sign, Electronic Co-Sign, PDP, Entry Link, RX Dose Check, or Pharmacy) and click **Edit**.
2. The default picklists appear.
3. Select a choice that is to be modified and click **Setup**. Once at the desired word to be edited, select **Edit.**
4. Type the desired data and click **OK** to save the change.
5. Repeat the process until the pick list choices are as desired.
6. Click **Close**.

If you are unfamiliar with making changes in the Setups tab, please call the American Data support staff and they will assist you with making changes.

Note: Only American Data support staff may adjust items that are within the Locate screen also known as the tree setups. If adjustments are needed in this location, please contact the support staff. In addition, once a filter has been within the tree, it may not be removed out as it would remove with it any client names within that filter.

System Settings – Grid Tab

This is where all default settings for words are located. If a system administrator would like the default setting of the words to be adjusted, that can be completed here. However, if a word

does not have "Default" checked, they will not take on any of the new changes made within this screen. We recommend contacting American Data support before making an adjustment in here as there are several items to consider.

System Settings – Report Panel Tab

If the facility will be utilizing report panels, the system administrator may setup a system wide path in this location. When any report panel is run within ECS, it will then save to the location specified on this tab.
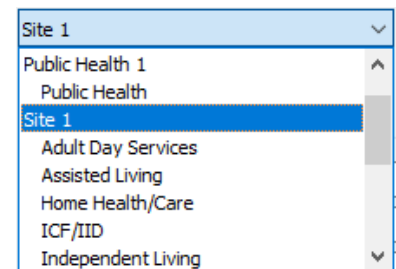
System Settings – Notify Popup

This setting will allow you to send and display an on-screen popup message for all users logged in to ECS at that time. This is helpful when needing to inform users that an update of ECS is about to occur and that they need to exit ECS.

Site Settings

In ECS, click **American Data – ECS** > **Help** > **Client Sign On** and check out the **System Settings** video located in the System Supervisor category. There are eight tabs: ID, Send, Financial, MDS, RUG IV, PDPM, ECS Events, and Script.

Before making any changes, make sure the appropriate site is selected in the drop-down menu in the upper left corner.
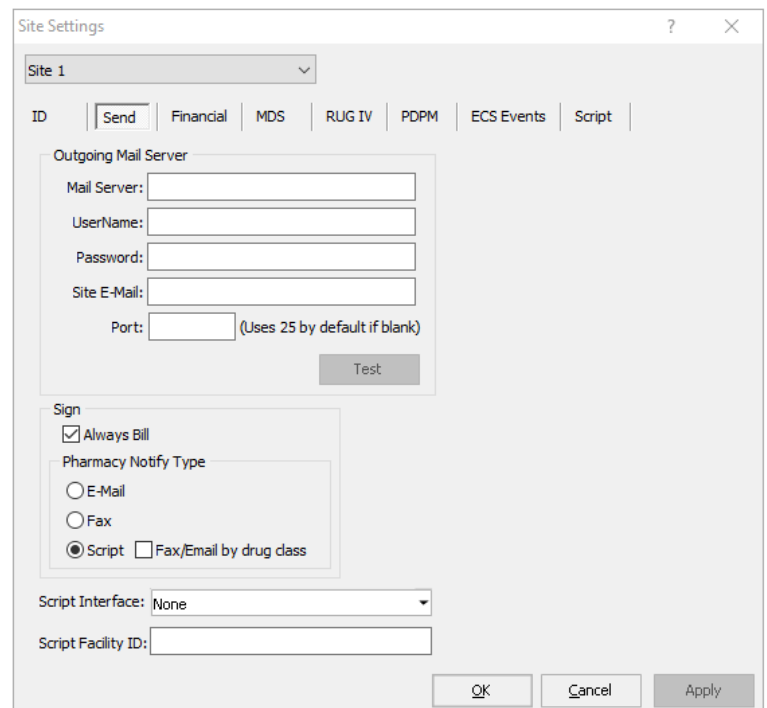
Site Settings – ID Tab

This tab provides the setup of the facility ID number for MDS transmission, Medicare and Medicaid provider numbers, and National Provider Identification (NPI) number. Only American Data staff may populate these fields. You will be unable to enter/edit the numbers in these fields. If a change is required, please contact American Data.

Site Settings – Send Tab

Outgoing Mail Server

Setup of this tab allows for the capability of certain information to be emailed *out of* ECS (e.g., new medication orders being emailed directly to the pharmacy). This tab MUST be filled out for the emailing function to work. Typically, this tab is set up in conjunction with your IT department and American Data's technical department. Enter your outgoing mail server information and which type of encryption you'll be using.

Pharmacy Notify Type

Set the pharmacy notify type (E-Mail, Fax, or Script) for communication of physician orders between ECS and your pharmacy. Script 10.6 is a separate contract with ECS. If you are interested in learning more about the capability to send orders electronically, please contact American Data's support staff.

Site Settings – Financial Tab

If your facility purchased the financial portion of ECS, this tab would need to be completed with the facility's financial contact information and Federal Tax Number.

Site Settings – MDS Tab

This tab should first be set to the appropriate state in the upper left corner.

Type of Provider

Mark whether the facility is a Nursing Home or a Swing Bed facility.

Calculate PDPM for OBRA

In October 2020, CMS released a new option which allows OBRA assessments to calculate a PDPM HIPPS code. This is to allow states to begin to develop a new payment model that is no longer reliant on RUG scores. To turn this feature on so that your facility's MDS assessments will generate a PDPM HIPPS code on OBRA assessments, place a checkmark here. If a facility is in a state that is billing off PDPM HIPPS codes, this will need to be checked.

RUG IV for Med Replacement or Insurance Billing

If a facility has a Medicare replacement or insurance billing company that continues to require RUG IV instead of PDPM, a checkmark should be placed here. This will then allow the MDS Coordinator to complete an assessment solely to calculate a RUG IV score. These assessments cannot be combined with any other and will not be transmitted to CMS.

Site Info

Enter the site contact information for your MDS coordinator. This is included in electronic transmission of MDS to CMS.

MDS 3.0

In the MDS 3.0 section, enter the CCN, which is the same as Federal No (Medicare) in the ID tab; these two numbers should match exactly.

CAAs after MDS

If **CAAs after MDS** is selected, that means that CAAs can only be worked on after the MDS has been submitted in ECS. Removing this checkmark allows staff to complete CAAs as soon as a CAA has triggered, even if the whole MDS has not been completed.

Schedule Setup

This area is where the setup is determined for MDS assessments as to when each assessment will occur on the schedule. This schedule is located within the MDS Manager. Staff may determine number of days between each assessment type as well as which assessment to follow should be.

Section to sign

Clicking this will bring up the Section to Sign screen where the facility may determine which section needs to light up for each assessment type. This is updated automatically with ECS updates as new assessment types are added or are adjusted. However, there are times where a facility may want to start or stop requiring a particular HIPPS calculation be automatically made and therefore would like to add or remove checkmarks from those columns. For example, most facilities do not calculate Z0250 or Z0300 so they would not want a checkmark displaying there; however, some facilities may decide to start calculating those automatically and therefore would need to add a checkmark.

Service Settings – MDS Tab

When looking at a specific service, there will be an MDS tab available which has one checkbox located on it titled **Allow MDS.** This checkbox indicates that a user may complete a MDS assessment on all name(s) located within that particular site/service combination. If there is no checkmark here, then users will be unable to begin an MDS assessment on a resident in that locate status. This is to help prevent users from starting assessments on incorrect locate statuses (such as Home Health or Assisted Living where MDS assessments are not completed).

Site Settings - RUG IV Tab

Use the drop-down menu in the upper left corner to switch between the different RUG fields (Z0100, Z0150, Z0200, Z0250, and Z0300). Make sure the Grouper Version, Case Mix, and Calculation are set appropriately for each RUG field.

Z0100
This option is no longer utilized as the Z0100 field now calculates a PDPM HIPPS Code.
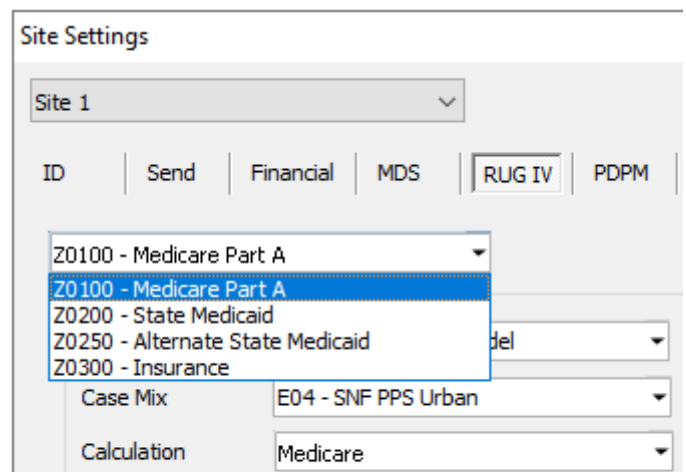

Z0200
The settings for **Z0200- State Medicaid** dictate the RUG scores that will be determined for your Medicaid. Your state association or state help desk can provide you with what the setups need to be.

Z0250
Use the drop-down to switch to **Z0250-Alternate State Medicaid**. Your state may not require any setups in this area, and you may leave the default settings. There are only a handful of states that use this field currently.

Z0300
Use the drop-down to select **Z0300-Insurance**. Although there are no specific settings that need to be entered, we generally recommend you put the same settings here that you used for Z0100.
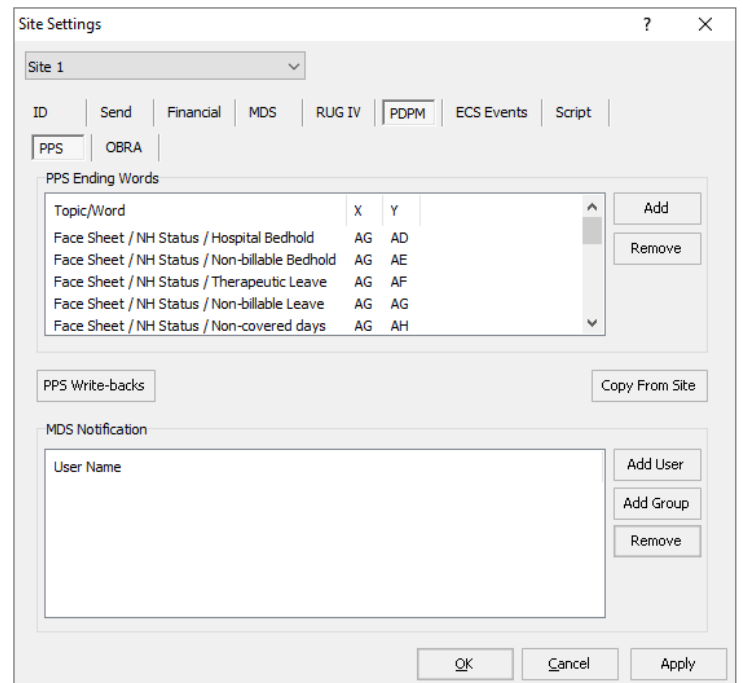
Site Settings – PDPM Tab

The PDPM tab will determine the Ending Words which will stop a PDPM HIPPS code from billing. In addition, the MDS Write-backs and MDS Notifications can be setup within this tab as well. You will first want to start with clicking into the PPS or the OBRA tab.

PPS/OBRA Ending Words

Use the Add and Remove buttons to manage this list. This box should display words that appear on the calendar and indicate a break in a covered stay. This is used to calculate and manage the MDS PPDM HIPPS code calculations. The words listed on the PPS tab will vary from the OBRA tab. For example, on the PPS tab, all payer sources, except Medicare A and Medicare A Replacement should be listed as any other payer should stop the HIPPS code. In addition, a break in the stay such as a hospital bed hold, therapeutic leave, or discharge should also end the resident's stay. On the OBRA tab, it may be that only the discharged occupancy status displays since the resident can be on any payer source and require an OBRA MDS to be completed.

PPS/OBRA Write-backs

These buttons control where the PDPM HIPPS codes calculated in Section Z of the MDS will write back to within the record. Every facility should have an MDS tab where all MDS assessments will document into once the MDS is submitted into ECS. These will already be setup for a brand-new facility.

Copy From Site

Utilize this to copy the setups from one site to another. This is helpful if your database has multiple sites located within. Simply setup one of the sites and utilize the Copy From Other Site to copy this information onto each of the sites.

MDS Notification

The MDS Notification area allows you to choose users and/or user groups to receive notifications if there is a new MDS submitted, or a change to a submitted MDS **IF** the PDPM HIPPS Code Start Date falls within a period that has already had a calculation posted.

Notifications will be sent to the selected user(s)/user group(s) in the Internal Communication area within ECS. This works in conjunction with a MDS Notification checkbox found on the Calculate Control screen.

Only calculations that are posted **after** this checkbox are in place will send notifications. Notifications are not resident specific. An MDS for any resident will send notifications if any

other resident has the dates of service billed that are within the range of the PDPM HIPPS Code Start Date of the MDS. For example, if John Doe is billed for March and Tom Smith gets an MDS completed with a PDPM HIPPS Code Start Date in March, notification will be sent that Tom's MDS was completed. This is so that MDSs completed after billing has been completed will notify billing staff that they are now able to bill that resident.