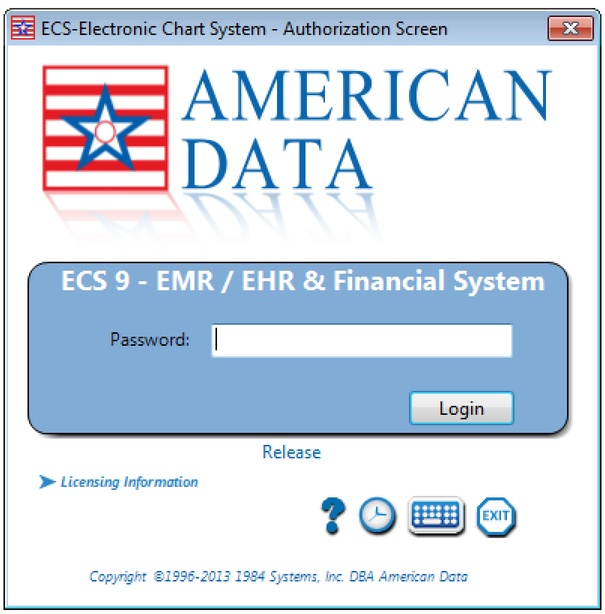
Core Training

Logging In and Out

Log in to ECS

1. Double-click on the ECS icon to bring up the ECS Authorization Screen.
2. Enter your login name (if required).
3. Enter your Password.
4. Enter a Delay Login for this session, if desired. (See below for details.)
5. Click **OK**.
6. Alternate Login: If the computer you are using has a fingerprint reader on it, you may scan your fingerprint rather than entering your login name and password.
7. Verify correct login by locating your name in the bottom toolbar in ECS.

Authorization Screen



- This is the screen that appears after you double -click on the ECS icon.
- Contains a link to the ECS User Manual, a button to bring up a keyboard, American Data's website.
- Click the **Licensing Information** link to see your ECS Serial Number, which is used to log into the Client Sign On portion of American Data's website (www.american-data.com).

Password

- Each user selects or is assigned a password that is a minimum of 6 characters long.
- The system may also require use of a login name. (This is a system setting.)
- Users may be required to change their password at regular intervals.
- A fingerprint reader may be used in place of a password.
- Your login and Password place your electronic signature on your documentation. Never share your password, to keep your signature secure.

Changing your Password

- You may be prompted to change your password upon logging in to ECS. This may occur if you were given a generic password when your profile was created. Or, your ECS may be set to require a password change at regular intervals.
- When you log in to ECS on the Authorization Screen, the Change Password screen will appear. You will be required to fill out 3 fields: Old Password, New Password, and Confirm New Password. Enter your current password (the one you just used to log in) into the "Old Password" field. Decide on a new password (at least 6 characters long) and enter it into the "New Password" field. Enter the new password one more time into the "Confirm New Password" field. Click OK to confirm changes.
- Your login name does not change when you change your password.

Delay Login

- This field appears on the Authorization Screen.
- This is useful if you are using an ECS application in which ECS automatically locks you out after a brief time, by allowing you to use the shorter password to log back in.
- You may enter an abbreviated password here (e.g., if your password is 123456789, you may enter a 1 or 2-digit password, such as 19).
- Delay logins are valid for the current ECS session only. The delay login must be reset each time you log in to ECS.

Electronic Signatures

- Each entry you create in ECS is tagged with "identifiers." These include the date of the entry, the time of the entry, and the name, title, and initials of the user logged into the session.
- Electronic Signatures are legally binding and serve the same purpose as a manual signature at the end of a note or assessment. For this reason, always make sure you log off at the end of your session, and that you log yourself in at the beginning of each session. This helps ensure that no one else can chart with your signature, or that you chart with someone else's signature.

Hide/Secure ECS Feature

- The Hide ECS feature gives you the chance to lock ECS on the computer you are working on for a short time if you need to step away from the screen (e.g. medication pass). This acts like a "bookmark," keeping your place while preventing others from seeing the screen or logging you off.
- Click the Hide icon or click American Data – ECS > Hide ECS.
- "Hide ECS" may be set to kick in automatically during certain ECS applications (e.g., after 30 seconds of idle time).
- When "Hide ECS" takes effect, ECS is minimized and a screen pops up displaying the name of the user currently logged in to that ECS session. Only that user's password or "Delay Login" will bring ECS back up.
- If the user who activated the "Hide ECS" feature is unavailable to log back in, the session must be ended by other means, such as Ctrl+Alt+Delete. The procedure may vary depending upon other variables, such as whether ECS is operating on thin clients, or a Citrix environment. This is typically worked out with the facility's IT department.

Exiting ECS

- It is important to log out of ECS whenever you will not be actively using it, to ensure that no other user can access it with your user profile entered.
- To close out of ECS, first close out of all of the screens that are open. This includes any documentation, viewing, MDS or other screens that may be open or layered on top of one another. Each screen that is open is represented by a tab at the top of the screen. Click the X on the tab to close each tab.
- Click the X in the top right corner of ECS to logout, or click American Data – ECS > Exit.

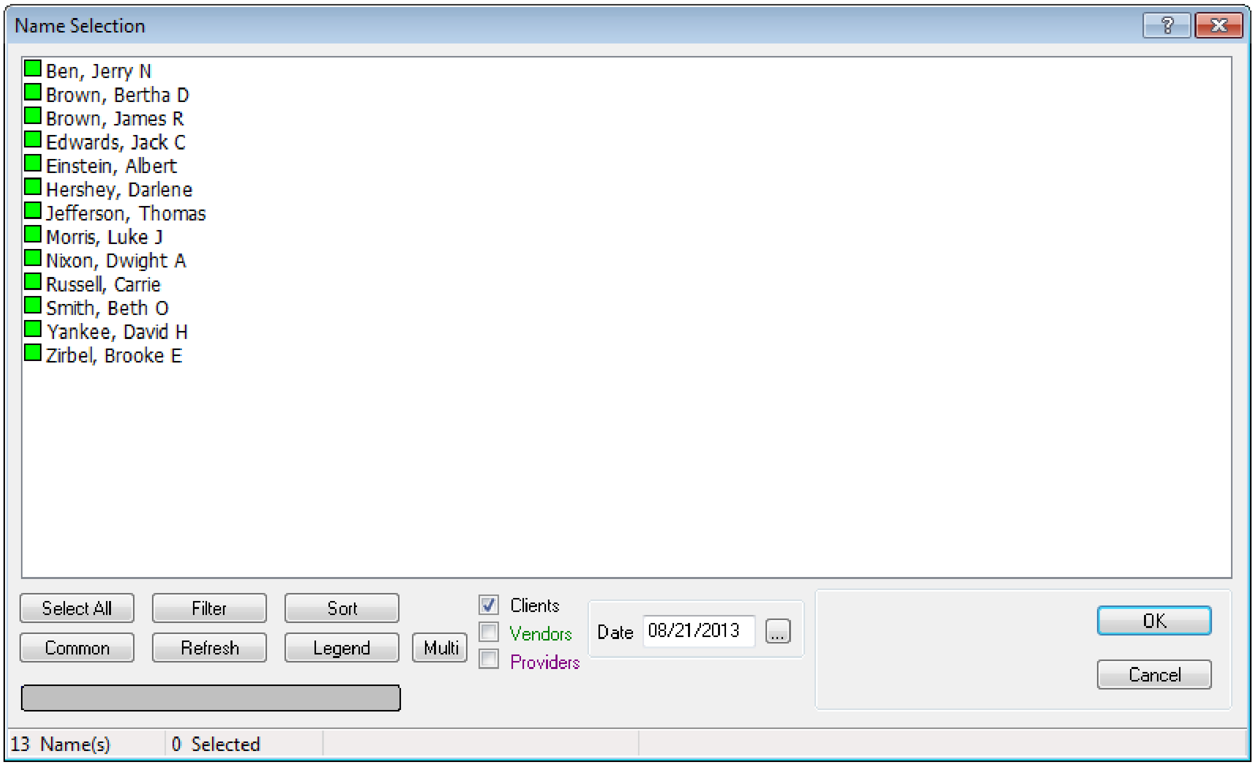
ECS Support

- ECS User Manual
    - The user manual can be accessed on the Authorization screen by clicking on the question mark (?) button and selecting the appropriate manual – Nursing Home or Assisted Living.
    - If you are logged into ECS, click American Data and select Help > Manual; then select Nursing Home or Assisted Living.
- Key users within your organization may be identified as ECS Support people who may be contacted when questions or problems arise.
- You may contact American Data for routine support by calling 800-464-9942 between 8am-5pm CST. American Data attempts to return calls for clinical support within an hour and at least the same day.

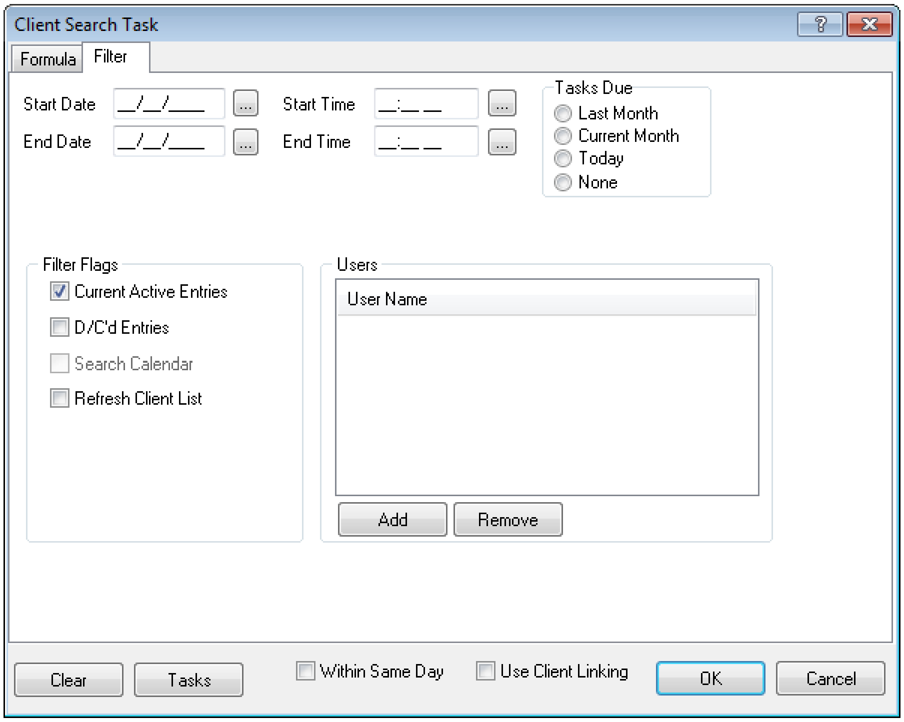
- You may email for support at info@american-data.com for general questions or clinical@american-data.com, financial@american-data.com , or tech@american-data.com.
- After hours support that cannot wait for the next business day is available 24/7. You can find the number for after hours support by going into the Manual, selecting "Introduction," then "Support Office Hours," and scrolling to the bottom.
- Support calls and emails that are considered routine support matters are not billable. However, training by phone or remote connection, or extraordinary support is considered billable. You will be notified by the clinical department if the assistance you are requesting from that department is considered billable, prior to incurring any charges from that department.

Selecting Clients

1. Most tasks/procedures in the record are client driven. Whether you are charting, billing, posting cash, or reviewing reports, you typically need to define for which client(s) you are doing so.
2. Most processes in ECS require you to select clients from a Name Selection screen to complete the process.
    a. The client list typically defaults to a list of current active, inactive, and hold clients for financial users. Clinical users typically are defaulted to only those clients who are currently active.
    b. Corporate clinical staff typically has access to clients from all facilities.



3. Filtering the client list.
    a. The client list has a **Filter** button at the bottom of it which allows you to expand or narrow down the client list based on filters set on the Demographic screen.
    b. For purposes of managing the client list, each client is assigned to one of 6 statuses: Active / Inactive / Hold / Referral / Other / Closed Account. After clicking **Filter**, you may add or remove checkmarks from the six (6) statuses as desires to bring up clients in the desired status(s).
    c. Clients may be also be defined into six (6) filters. The first two (2) are Site and Service, which are defined by the location of the client on the campus. Four (4) additional filters are available to be used as needed by the facility. Typical setting for these filters include; Unit, Med Cart, Floor, CNA Assignment, but may be any filter needed by the facility. After clicking Filter, you may select from the filters as needed to narrow your client list to those clients who share a filter (e.g., Unit 1). You may hold the Ctrl button on the keyboard to select more than one filter option from a category (e.g., Unit 1 and Unit 2).
4. Using “Common” to define the client list
    a. The Name Selection screen has a **Common** button at the bottom of it which allows you to narrow down the client list based on entries in clients’ records (e.g., clients in house on a certain day, clients with the same doctor, clients with the same payer source, etc.).



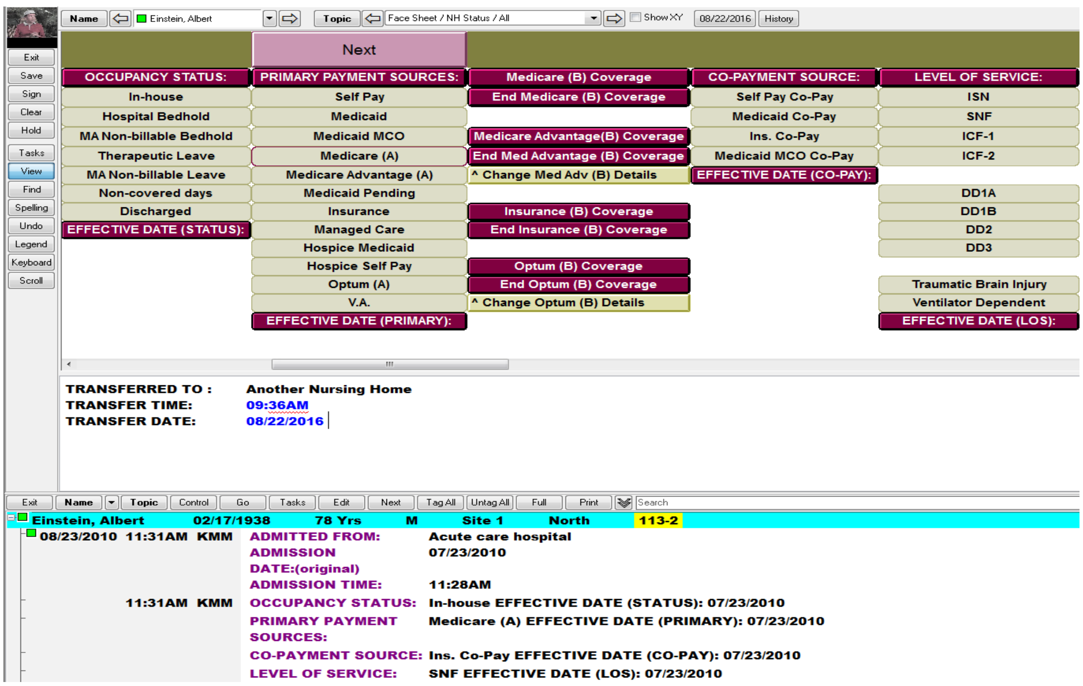
   b. Click on the **Common** button, and then click on the **Tasks** button. Select the task you need and click **Load**. Select dates if needed and click **OK**. The client list will narrow down to clients that meet the criteria of the common task.

5. Selecting Clients.
   a. Click on the name of the client you want.
   b. For several clients, click the **Ctrl** and/or **Shift** button on your keyboard, or click on the **Multi** button on the screen. Each name you click will remain highlighted.
   c. To select a whole section of clients, click the first name, click **Shift** on the keyboard, and then click on the last name. All names between the two will highlight.
   d. To select all the displayed names, click the **Select All** button at the bottom of the screen.
6. Switching/Changing Clients
   a. In documentation, use the next/previous client arrows to switch to the next or previous client selected. When only one client was selected, click **Name** to select new or additional names.
   b. Any screen displaying a Name(s) button allows you to select different names than the currently selected one(s).

Viewing Records

Viewing of the records can be done within any of the documentation screens. Each documentation screen is split into three sections. The top portion of the screen is where the user selects words from. The middle portion displays the note that is being constructed and the lower portion is called a defined review. The defined review portion of the screen will show past documentation from a specific time frame. To adjust what is shown within the defined review, follow the steps below.

1. Click **Control**. Use the Filter tab to select parameters for the search if needed, including date range, time range, discontinued entries.
2. Use the Look tab to display entries a certain way, including sorting into topic or chronological order, lines between topics, free text highlighter, show names of initials, etc.
3. Click **Go** to display entries.
4. You can select any of the Client, Topic, Task or Control buttons to change the selections made. You will need to click **Go** again to display new results after changing any of these options.



Editing

Only entries displayed on a View screen can be edited. All changes to entries are tracked by date, time, and user. Entries are never completely removed from the record. Editing rights vary by user group and responsibility.

1. On a View screen, click on the entry you want to edit. This is called “tagging” the entry and will turn the text red. If you select multiple entries, the last entry you select will appear with a yellow highlight.
2. Click the **Edit** button, or right-click on the entry to display the editing menu.
3. Editing Options
   a. New
   b. Copy
   c. Copy One/All to Other Client(s)

d. Archive Selected
e. Skip

4. Complete Editing action as needed (all new and copy editing options involve adding or confirming documentation).
5. Click **Go** to refresh screen and display (or remove) changes.

Editing Feature	Function	Example
New	Allows you to write a new entry in the same topic area as the tagged entry.	
Copy	Creates an exact copy of the tagged entry that is displayed on the documenting screen. The copied entry may be edited before it is saved.	To bring up a copy of a previous note (e.g. physician or consult note, or a CAA) and modify and save it to create a new note.
Add Extension	Not functional.	N/A
Copy One to other Client	Allows user to copy an active or discontinued entry from one record to another, or back into the same record.	You charted information into the wrong record, and want to copy it to the correct record. OR, you want to copy inactive entries back into the record as active entries – such as on re-admission.
Copy All to other Client	Allows user to copy more than one active or discontinued entry from one record to another, or back into the same record.	Same as above.
Archive Selected	Used to remove an incorrect entry.	Used to maintain the Calendar feature and billing processes – mostly used in Face Sheets, Therapy billing, and Activity attendance.
Skip	When a user is sequentially editing multiple tagged entries, this allows the user to skip an entry.	

Reports

Financial Reports icon

There are several different screens in ECS where a user may be accessing a financial report. Reports are used to display the billing summary for each payer source, as well as any other pertinent billing information such as insurance profiles for each resident.
Within the report, there are options to save to PDF, export, or print.

If, when previewing the report, you wish to change any report printing parameter, such as which clients or dates you selected, click **Control** to return to the Report Selection screen and make your change. When you click **OK** the report preview will refresh.

Calendar icon

There are several different screens in ECS where a user may be accessing a calendar report. Within the calendar, there are options to export or print.
Calendars are used to balance information within the system before any payer source is to be billed out. An example of this would be with the requirements calendars in which the group totals at the bottom of the calendar must match before a user can bill out that payer source. Calendars are also useful when a user needs to know the number of Medicare (A) days for a particular time frame or see which resident is in each room.
If, when viewing the calendar, you wish to change any parameter, such as which clients or dates you selected, click **Control** to return to the Calendar Report Selection screen and make your change. When you click **OK** the calendar will refresh.

Other Features

Layering screens

- Each screen is represented by a tab at the top of the screen.
- If you have more tabs open than can fit on the screen, you can use the arrow buttons  to bring tabs into view. Click > to scroll to the right. Click >> to move the screen to the furthest tab on the right. Click < to scroll to the left. Click << to move the screen to the furthest tab on the left (Toolbar tab).
- Click **American Data – ECS > Window**. From here, you can "tile" (side by side, or top to bottom), "cascade".
- Each open screen must be exited prior to exiting your ECS session.

Internal Communication

- An internal email system for ECS users.
- Messages to users may happen automatically (e.g., when it is charted that a resident was admitted or discharged), or may be created manually by clicking words or topics set up to send messages to others.
- You can access your messages by clicking the envelope icon  on the bottom toolbar. This icon will be covered by an integer in a red circle to indicate the number of new messages the user has. If the user receives more than 9 new messages, the icon is covered by an exclamation point in a red circle. If the user has 10 or more unread messages, the envelope will be covered by an exclamation point in a yellow circle. Users can also hover over the envelope to view the number of unread messages.
- Unread messages are indicated by bold font.
- Highlight messages and select Delete to delete them. Deleting messages does not delete the chart entries in the record.

- Store messages in yellow file folders on the left side, if needed. The folders can now be moved up and down in the list by using the double up arrow and double down arrow on the bottom of the screen.