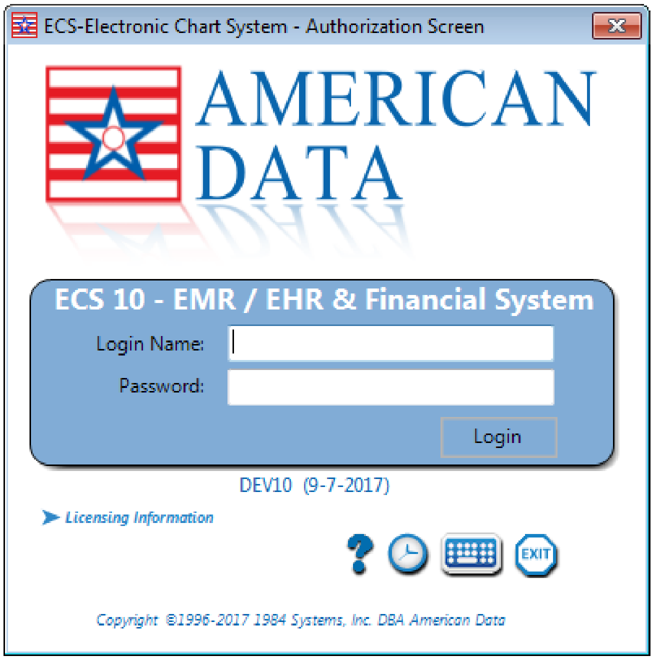
Core Training

Logging into ECS

1. Double-click the ECS icon to bring up the *ECS Authorization Screen*.
2. Enter your login name and password.
3. Enter a Delay Login for this session, if desired. (See below for details.)
4. Click **Login**.
5. 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.
6. Once logged into the system, verify your name in the bottom toolbar in ECS as this is going to serve as your legal signature on all your documentation.

Authorization Screen



- This is the screen that appears after you double -click the ECS icon.
- The icon brings up a keyboard (if needed).
- Click the **Licensing Information** link to find your Build or version number, as well as contact information for American Data's customer support.

Password

- Each user will be assigned a password that will need to be changed upon initial login.
- Users must select a password that is a minimum of 6 characters long and contain at least one number or letter based on system settings.

- 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 should never be shared to ensure your electronic signature remains secure.

Changing your Password

- You may be prompted to change your password upon logging into 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 into ECS on the *Authorization Screen*, the *Change Password* screen will appear. You will be required to complete 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. Then, 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 that is set to automatically lock you out after a brief time, by allowing you to use the shorter password to log back in.
- You may enter an abbreviated password (*i.e.,* if your password is 123456789, you may enter a 1- or 2-digit password, such as 19).
- Delayed logins are valid for the current ECS session only. The delay login *must* be reset each time you log into ECS.

Fingerprint Authorization

- This is optional in most states but mandatory in Ohio for completing electronic Medication Pass.
- If your duties require use of fingerprint authorization in ECS, you will be required to scan your fingerprint when your user profile is set up.
- When prompted to enter fingerprint authorization, place your fingertip on the scanner.
- Your fingerprint may be used to log into ECS in place of a login/password.

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

1. 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 (*i.e.,* medication pass). This acts like a "bookmark," keeping your place while preventing others from seeing the screen or logging you off.
2. Click the Hide icon or go to American Data – ECS > Hide ECS.
3. 'Hide ECS' may be set to kick in automatically during certain ECS applications (*i.e.,* after 30 seconds of idle time).
4. When 'Hide ECS' takes effect, ECS is minimized and a screen pops up displaying the name of the user currently logged into that session. Only that user's password or Delay Login will bring ECS back up.
5. 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 in a Citrix environment. This is typically worked out with the facility's IT department.

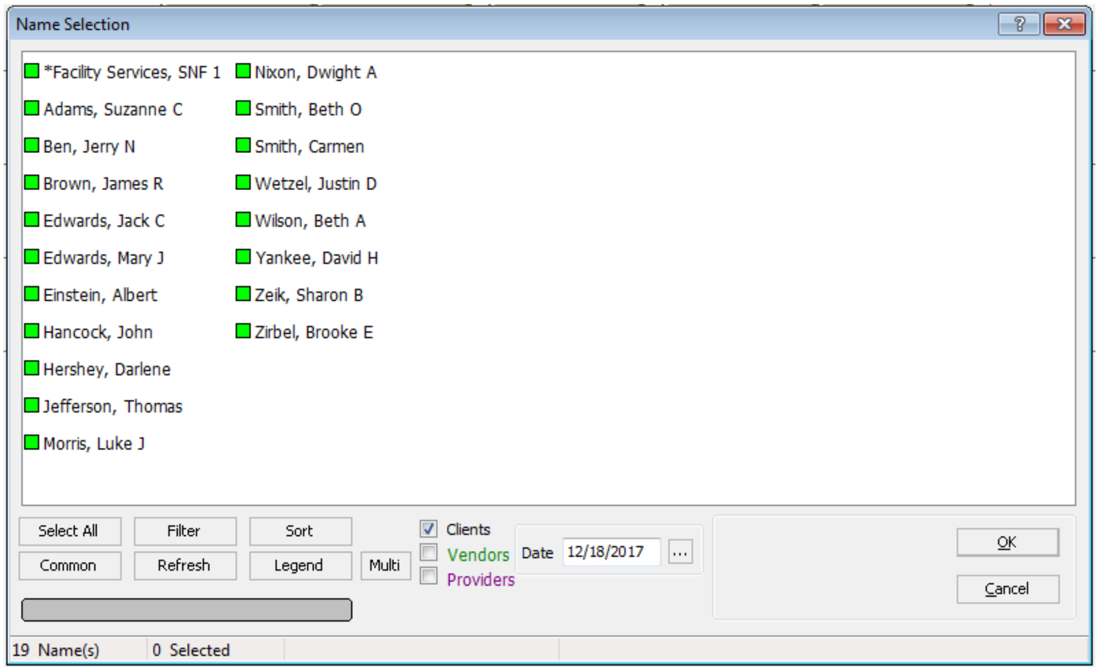
Exiting ECS

1. 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.
2. To close out of ECS, first close out of all 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.
3. Click the  in the top right corner of ECS to logout or go to American Data – ECS > Exit.

Selecting Clients

- Most tasks/procedures in the clinical record are client- (or provider-) driven. Whether you are charting, reviewing charts, or reviewing reports, you will typically need to define for which client(s) you are doing so.
- Most processes in ECS require you to select clients from a *Name Selection* screen to complete the process.
  - The client list typically defaults to a list of current active clients (except the business office, which includes all clients with active AR accounts, and Human Resources, which accesses provider records rather than client records).
  - When your user profile is set up, it may be set to show all active clients, or may be narrowed down to display a specific unit.

- Corporate clinical staff typically has access to clients from all facilities.

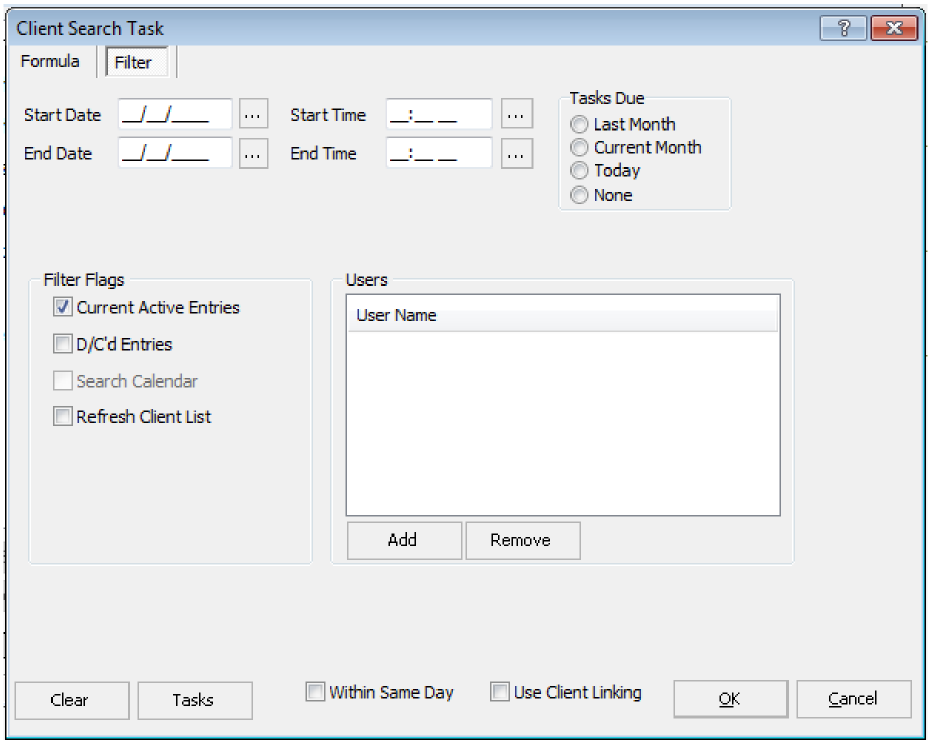


Filtering the Client List

- The client list has a **Filter** button at the bottom which allows you to expand or narrow down the list based on specific filters set on the *Demographic* screen.
- 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 to bring up the list of desired clients.
- Clients may be also be categorized 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 settings 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 down your client list to those clients who share a specific filter (*i.e.,* Unit 1). Hold the **Ctrl** button on your keyboard to select more than one filter option at a time from a category (*i.e.,* Unit 1 and Unit 2).

Using "Common" to Define the Client List

1. The *Name Selection* screen has a **Common** button at the bottom which allows you to narrow down the client list based on entries in clients' records (*i.e.,* clients in-house on a certain day, clients with the same doctor, clients with the same religion, etc.).



2. Click the **Common** button.
3. Click the **Tasks** button.
4. Select the task(s) you need and click **Load**.
5. Select dates (if needed) and click **OK**.
6. The client list will be narrowed down to clients that meet the criteria of the common task.

Selecting Clients

1. Click the name of the client you want.
2. To select several clients, hold the **Ctrl** button on your keyboard, or click the **Multi** button. Each name you click will remain highlighted.
3. To select a whole section of clients, click the first name, hold the **Shift** button on the keyboard, and then click the last name. All names between the two will be highlighted.
4. To select all the displayed names, click the **Select All** button at the bottom of the screen.

Switching/Changing Clients

1. For documentation, use the next/previous client arrows to switch to the next or previous client selected. When only one client is selected, click **Name** to select new or additional names.
2. Any screen displaying a Name(s) button allows you to select different names other than the currently selected one(s).

Documentation Basics

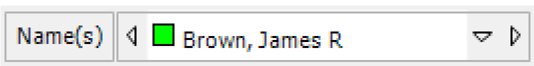
ECS is based on the idea that when staff enters information into a client's record, each piece of information is stored into a Section of the chart (*i.e.,* Face Sheet, Nurses Notes, Physician Orders) and a specific Topic within that Section (*i.e.,* Social History, Personal Information, Lab Results). All the stored entries are available to other users and can be pulled together from all different areas for review. This design eliminates much of the duplication seen in form-based charting.

Bringing Up a Write Screen

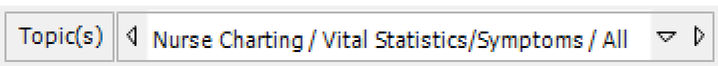
1. Click the appropriate charting button on your easy access screen. For example, to document Behavior in Nurse Charting, click the **Behavior** button on the *Nursing* Access screen.
2. The other methods are to click the **Write** icon or go to **American Data – ECS** > **Write** > **Entry**.

Elements of a Documentation Screen

1. A client(s) is selected that the entries are saved to.

2. A Section and Topic are selected or defined, in which the entries are saved.

3. A library of terms is displayed with a text box below the documenting screen.
4. The documenting screen contains questions and responses pertinent to the topic selected.
5. Notes and assessments are created by selecting words and phrases from the documenting screen and adding text as needed to build the note.

Typing vs. Clicking

- Overall documentation should consist of about 50-75% clicking (words/phrases from the library of terms), and 25-50% typing.
- Clicking key phrases allows the documentation to pull over to MDS, Billing, and Reports.
- Adding your own text/wording to elaborate on the documentation ensures the charting is specific and detailed.

Late Entries

Most documentation screens have a word "Late Entry" that can be clicked when an entry needs to be made for a previous shift or prior date. This word may be selected at the beginning or end of an entry. It prompts you to select a date which the entry is for.

Defined Review

Most documentation screens display a View screen at the bottom of the screen with data that is relevant to the charting being completed (*i.e.,* Pain Assessment displays the client's

Analgesic orders and recent PRN pain medication use). This View screen has all the capabilities of using the **View** icon or the **View Chart** button.

Viewing Records

A View screen allows you to view one record or multiple records at a time. It is a powerful tool for reviewing charts, identifying clients and risk, and finding clients with common data elements (*i.e.,* wounds, falls, psychotropic meds, lack of stool output, etc.)

1. There are several ways to pull up a View screen. From an Access screen, click the **View Chart** button. Or, click the **View** icon or go to **American Data – ECS > View > Entry.**
2. Select the client(s) you wish to review data for (use Filter, Common, and Select All as needed), and click **OK**.
3. Select the **Topic** button to select the Section, Topic(s), or Word(s) you wish to review in the record(s). Or, click the **Task** button to select the task(s) you wish to view, and then click **Load** and **OK**.
4. Click **Control**. Use the **Filter** tab to select parameters for the search (if needed), including date range, time range, and/or discontinued entries.
5. Use the **Look** tab to display entries a certain way, including sorting by topic or in chronological order, lines between topics, free text highlighter, show names of initials, etc.
6. Click **Go** to display the entries.
7. Click any of the **Client**, **Topic**, **Task** or **Control** buttons to change the selections made. **NOTE:** You will need to click **Go** after changing any selections to display the new results.

Reports

General Reports

Many of the different access screens have easy buttons linked to commonly used reports. For example, the *Activities* Access screen has a column of reports including a Birthday list and Attendance logs, and the *ADT/Face Sheet* Access screen has a column of reports including the Daily Census and the Room/Bed list. To view one of these reports, click the appropriate easy button, select the desired client(s) from the name selection list, and click **OK**. To view a report that may not be linked to an easy button, follow the steps below:

1. Click the Reports icon. Or, go to American Data – ECS > View > Report > General.
2. Select the desired client(s) and click **OK**. The *Report Selection* screen appears.
3. Select the report(s) and click **OK**. Or, click the **Tasks** button, select the task(s), and then click **Load**.
4. Select dates, times, and users as needed.
5. Select the **Preview** checkbox to see a preview of the report before it is printed.
6. Click **OK** to display the preview.
7. When previewing the report, if you wish to change any printing parameter, such as which clients or dates you selected, click the **Control** button to return to the *Report*

Selection screen and then make your change. When you click **OK**, the report preview will refresh.

8. Select the printer icon to print, the PDF icon to save to pdf, or click **Close** when finished.

Calendar Reports

Several of the frequently used calendar reports are linked to easy access buttons. For example, the *ADT/Face Sheet* Access screen has a column of calendar reports including a Statistics calendar and a Diagnoses calendar. To view a Calendar Report, click the corresponding easy button, select the desired client(s) from the name selection list, and click **OK**.

To view a calendar that may not be linked to an easy button, follow these steps:

1. Click the Calendar icon. Or, go to American Data – ECS > View > Calendar.
2. Select the desired client(s) and click **OK**. The *Calendar Report* screen appears.
3. Click the **Tasks** button, select the desired task(s), then click **Load**.
4. Select a date range.
5. Click **OK** to preview the Calendar Report.
6. Click the **Control** button to return to the calendar task setup if you want to alter clients, task, dates, or other options.
7. Click the **Print** button to print the report.

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 the entry you want to edit. This is called "tagging" the entry and will turn the text red. If you select multiple entries, the first entry you selected will appear with a yellow highlight.
2. Click the **Edit** button, or right-click the entry to display the editing menu.
3. See the chart below for all editing options.
4. Complete the Editing action as needed (all the append, new and copy-editing options involve adding or confirming documentation).
5. Click **Go** to refresh the screen and display (or remove) changes.

Editing Feature	Function	Example
Append / Append All	Information is permanently attached to the entry; further editing will not be able to be done to the entry except to discontinue	Cosigning a student's documentation

New	A new, separate entry made in the same topic area	Not typically used when editing department notes. Can be used to see where an entry was charted
Copy	An exact copy of the entry is made	An entry was accidentally discontinued and needs to be made active again
Copy One (All) to Other Client[s]	An exact copy of the entry is made and placed in another resident's chart	An entry was accidentally made in the wrong resident's chart. Use ALL if more than one entry was selected
Discontinue and Append	Entry is discontinued and user is taken to a Write screen to document additional notes	An error was made in documenting the entry and the user would like to explain why the entry is being discontinued
Discontinue and New	Entry is discontinued, a new entry is made in its place	Not typically used when editing department notes
Discontinue and Copy	Entry is discontinued, copy of entry is displayed allowing user to make changes to the original entry	User forgot to use a button word when documenting and would like to 'insert' the word into the entry
Discontinue	Entry is discontinued	Not typically used when editing department notes
Discontinue All	All highlighted entries are discontinued for one client	Not typically used when editing department notes
Discontinue Multiple Client Entries	All highlighted entries are discontinued for multiple clients	Not typically used when editing department notes
Skip	Allows user to skip a highlighted entry	Highlighted an entry that does not need editing

Other Features

Layering Screens

1. Each screen is represented by a tab at the top of the screen.
2. 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).
3. Click **American Data – ECS > Window**. From here, you can "tile" (side-by-side) or "cascade" (top-to-bottom).
4. Each open screen must be exited prior to exiting your ECS session.

Internal Communication

An internal email system for ECS users.

- Messages can be set up to happen automatically (*i.e.,* when it is charted that a client falls), or created manually by clicking words or topics 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 a number in a red circle to indicate how many new messages the user has. If the user receives more than 9 new messages, the icon will be 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.
- To delete a message, highlight it and select **Delete**.
  NOTE: Deleting messages does *not* remove the chart entries within the record.
- Store messages in yellow file folders by right clicking into the blank space to the left of the messages and selecting **New Folder**. The folders can be moved up and down in the list by using the double up and double down arrows on the bottom of the screen.
- Use the *Memo client to create messages not specific to a resident. Select the Memo Section and Topic to write these messages.
- Some messages may indicate that a co-signature is required. **Edit** and **Append** the entry if you are required to cosign.