

# Human Resources

In ECS, employees are entered into the system as providers. Information on how to add a provider is detailed further in this handout. The following image is an example of what your Human Resources Access screen might look like.

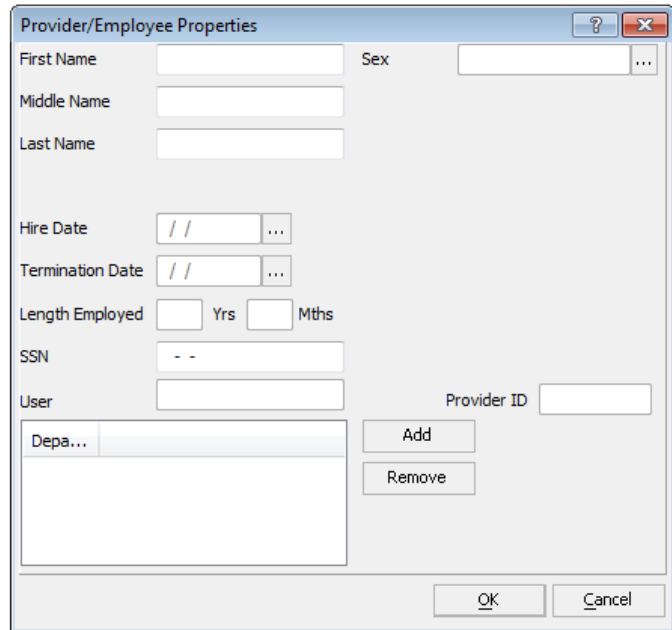
Human Resources	Charting		Reports		Chart Review
Main Menu	New Employee	In House Education	Employee Data Sheet	Education Totals	Edit Charting
	Employee Info	CEUs	Benefits Report	CEU Totals	
	Benefit Enrollment	Employee Evals	Immunization Record	License Expirations	
	Immunization Record	Complaint Record	Complaint Record	Evaluations	
	Attendance Record	Worker's Compensation Claims	Volunteer Information	Attendance Record	
	Volunteers	Confidential Message	Volunteer Minutes	Attendance Record Calendar	
				Reasons for Leaving (Graph)	

## Charting

### New Employee

1. From the Human Resources Access screen, click **New Employee**.

2. Click **New** and select the **Provider** option. The Provider/Employee Properties window appears.
3. Enter the Provider/Employee demographic information and click **OK** to save the information.
4. The user will then be prompted with the Locate screen where the Provider must be set to **Active** in the appropriate Site/Service that they will be mainly be working in. If the employee will float between different services, pick the one that they will be working in most often.
5. Once completed in the Locate screen, click **OK** to enter the Provider/Employee into the system.



The screenshot shows a 'Provider/Employee Properties' dialog box with the following fields and controls:

- First Name: [Text Box]
- Middle Name: [Text Box]
- Last Name: [Text Box]
- Sex: [Text Box]
- Hire Date: [Date Picker]
- Termination Date: [Date Picker]
- Length Employed: [Yrs] [Mths]
- SSN: [Text Box]
- User: [Text Box]
- Provider ID: [Text Box]
- Buttons: Add, Remove, OK, Cancel

## Complete Charting in the Documenting Screens

1. From the Human Resources access screen, click the button you are interested in charting in, select the provider(s) you are interested in charting on.
2. Work from left to right through the documenting screen.
3. When the screen no longer advances, you know that you have finished the task.
4. Click **Save** and **Exit** to return to the access screen.

**Pre-Hire** can be utilized to track the application/resume process, as well as all information pertaining the interview. Post-interview data may include a rejection letter (there is a generic template built in), reference checks, background checks, etc.

**Hire or End Employment** can be utilized to track all information pertaining the hiring process (including employment type, status, shift, position hired for, and eligibility for benefits). This is also where termination of employment is documented (including type of termination, reason for leaving, and whether eligible for rehire).

**Employee Information** can be utilized for personal information, such as birthday, mailing address, phone number, emergency contact information, and license type.

**Benefit Enrollment** can be utilized to track any benefits that the employees have enrolled or declined to enroll in. This screen may be customized based on the facility's specific plan types.

**Immunization Record** can be utilized to track all flu shots, TB skin tests, MMR vaccinations, etc. This screen may be customized based on vaccinations the facility provides. Nursing staff may

be given access to this one screen in Human Resources if you would like them to chart this information.

**Attendance Record** can be utilized to document employee's who call in sick, are in late, leave early, or have an unexcused absence.

**Education/Expenses** is utilized to enter in-house education, continuing education hours, as well as any education expenses. If needing to document on more than provider at a time, note that all entries must be identical. It is recommended to document all same entries on all providers at once to save time.

**Employee Evals** may be used as is or developed by the facility to best track and monitor their employees. ECS allows the user to easily navigate to these areas and develop reviews to best capture employee performance.

**Complaint Record** is to be used if there are any complaints made against a staff member. The response to the complaint as well as investigation is all documented within this topic as well.

**Worker's Compensation Claims** can be utilized to document all claims made. Any relevant forms can be attached directly into the record as well.

**Confidential Message** can be utilized to send messages to other users within the system regarding meetings, benefits, time off schedules, disciplinary actions, etc. First choose what the message is regarding, then type in the message and lastly choose who to send it to. If **pick user on Save** is selected, a user selection screen will appear upon clicking the Save button. These messages may only be read by the person who receives it.

**Volunteers** can be utilized to track information on volunteers, such as emergency contacts, day's available, desired frequency, and preferred activities. Documenting volunteer attendance can also be tracked within this screen so that reports may be ran to see how many volunteer hours are put in by each person.

**Employee Health** is utilized to chart staff monitoring of symptom screening and test results (if known). In addition, if a facility would like to track more detailed information regarding symptoms when an employee calls in or leaves early, this topic is also utilized to store that data. This information then populates into the Infection Control module where trending patterns can be shown in relation to staff/resident contact.

## Reports

Reports may be created as a way of compiling data into a neat, visually appealing format for printing or sending to appropriate staff members that are involved. All the reports are customizable, and facilities can develop their own to include information that is beneficial for their needs. Reports are found on the Human Resource Main Access screen under the Reports heading or sometimes at the end of Write screens.

1. From the Human Resources access screen, click one of the reports under the Reports heading.

2. Choose the desired provider and click **OK**.
3. From here the user may save, print, or email the selected report.
4. Click **Exit** when finished.

## Editing Features

From the Human Resources access screen, click onto the **Edit Charting** button, select the Provider(s) you need to view/edit charting on. Select a date range and click **OK** and **Go** to view all Human Resource charting for the specified dates.

To edit charting, click on the entry(s). The entry(s) will turn red. Click Edit and choose the desired editing feature. A message will prompt the user asking if they are sure they want to edit the entry, and the user should click **Yes**. Click **Go** to see updated charting. Editing options below that are highlighted are the ones used most often when editing Human Resources charting.

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	A provider's information was added into the charting initially, but now you need to add on their certification number as it was not known initially
New	A new, separate entry made in the same topic area	Not typically used when editing HR notes
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 HR notes
Discontinue and Copy	Entry is discontinued, copy of entry is displayed allowing user to make changes to the original entry	A provider's phone number has changed, and it needs to be updated
Discontinue	Entry is discontinued	An entry was made in error
Discontinue All	All highlighted entries are discontinued for one client	Not typically used when editing HR notes
Discontinue Multiple Client	All highlighted entries are discontinued for multiple clients	Several providers have the incorrect education course documented

Entries		
Skip	Allows user to skip a highlighted entry	Highlighted an entry that does not need editing