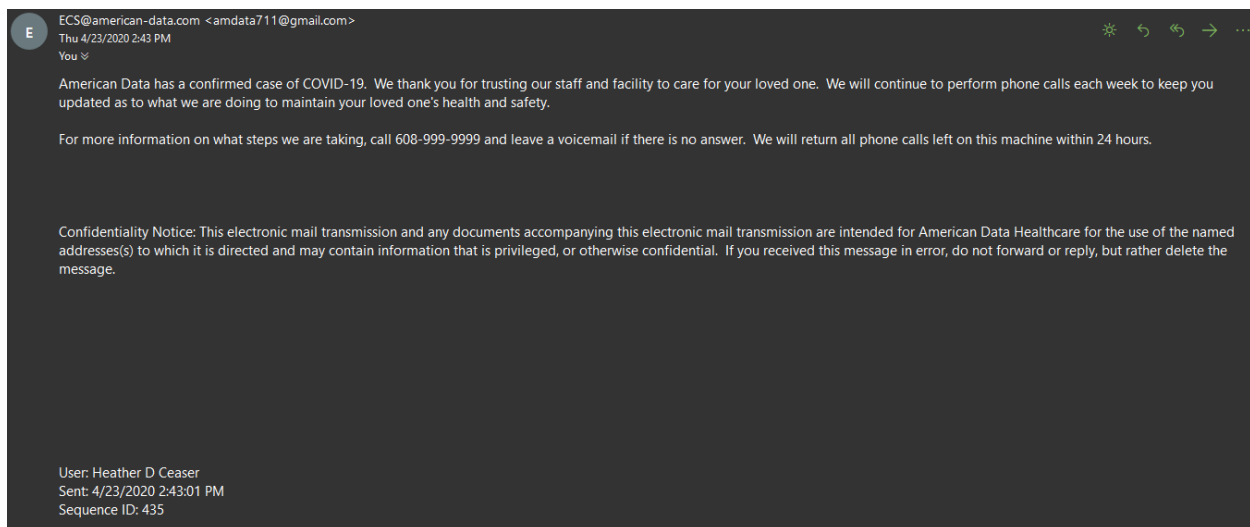
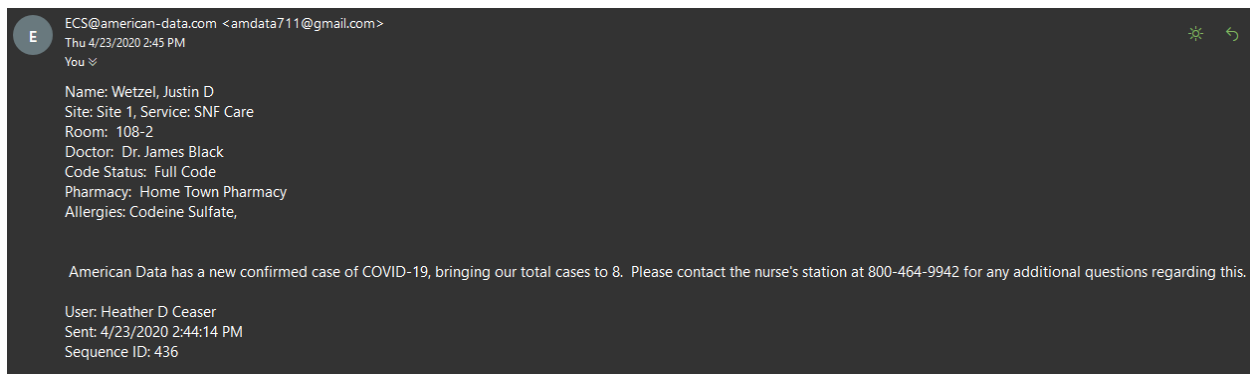


Mass Emails Out of ECS

Examples of Emails

There are two different ways to setup the emails to send out of ECS. The first way was described when this document was originally distributed. However, since then, we have been able to develop an additional option, which allows for no resident PHI to be included in the email. The steps are mainly the same, except for one additional item listed in Step 3. Below is an example of the email that our original handout (using Entry) will display as well as an example with no PHI.



Outgoing Mail Server (Step 1)

The first step is speaking with your facility's IT department to setup an **Outgoing Mail Server**. If your facility is hosted by American Data, please contact our IT department directly for setup.

1. Once the information for the Outgoing Mail Server is available, navigate to the following location to input it: **American Data - ECS > Settings > Site**.

2. Select the appropriate Site from the dropdown menu in the upper left-hand corner. Navigate to the **Send** tab. Fill in the information requested (Mail Server Name, Username, Password).
3. Once all information is populated, utilize the **Test** button to ensure it is setup correctly. You must send an email outside of your internal network to ensure it is setup correctly. For example, if your facility has email addresses that end in @american-data.com, you will need to test this by sending it to an email address without that at the end (such as a personal email address).
 - a. If this email does not appear to be received by the email address, check all Spam and Junk folders. If you continue to be unable to successfully receive an email, contact American Data's technical support department who can work directly with your IT department in resolving the problem.

Documentation of Contact Email Addresses (Step 2)

The next step is to ensure that all resident's have their contact information updated in the Face Sheet > Contacts or Emergency Contacts topic.

1. To check what is documented in that topic, navigate to the green **View** icon on the Toolbar or click onto a **View Chart** easy button. Select all names. Click **OK**.
2. Click onto **Topic**, navigate to the Face Sheet section > click to highlight the Contacts or Emergency Contacts topic > click **OK**.
3. Click **Go**.

If you do not have an **EMAIL** word within your Contacts topic, then you will need to create one. This can be done by copying/pasting another word within this topic. Make sure there is no special formatting on the **Text Control** tab (if you had copied a phone number word) and that the **Short Name** says **EMAIL:**. There are no other specific setups needed for this word to function appropriately.

Entries that need an email address added

1. Click onto the entry to tag it.
2. Click onto **Edit** > select **Discontinue and Copy**.
3. Once the new entry is copied in, click onto the EMAIL word, and enter in the email address.
4. Click **Next** to save your changes. Click **Go** if you want to update the screen with most recent changes.

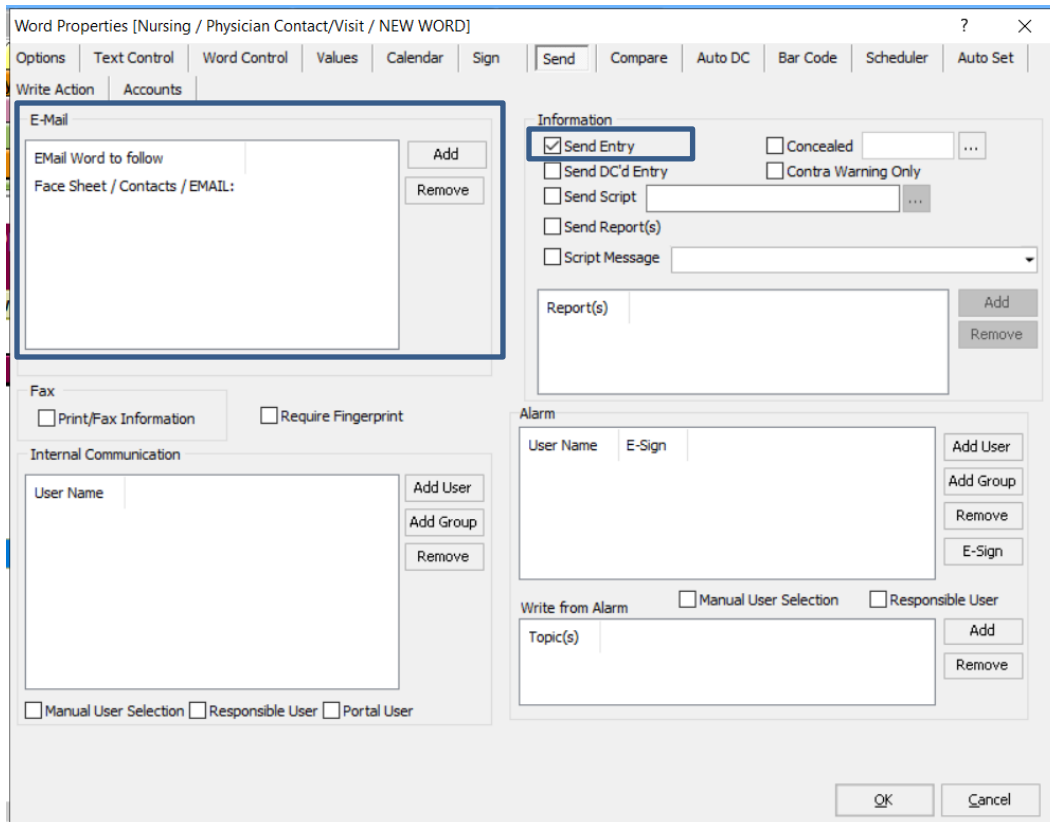
Residents missing contacts altogether

1. Click onto any entry on that client's name to tag it.
2. Click onto **Edit > New**.
3. This will load a documenting screen where you can click onto the Contact words and document the new contact information.
4. Click **Next** to save your changes. Click Go if you want to update the screen with most recent changes.

Word Which Triggers Email (Step 3)

This step will require some word, and possibly topic setups. If you need assistance, please contact American Data's clinical department. You may choose to utilize an existing topic, or you may want to create a new topic in which to send the emails out from.

1. Start by clicking into the **Setup** icon. Once in here, navigate to the topic in which you want to create the new word to trigger the emails in. This might be the Physician/Family Contact topic, or a topic within the Quality Assurance section.
2. Right click into a white space > select **New**.
3. Double click into the word to access word properties.
 - a. Name the **Short Name** something related to: Send COVID-19 Email. In the **Long Name**, include all the text which needs to be included within the body of the email which is received by the contacts.
 - b. Feel free to change the look of this word so it stands out more to staff by changing the **Word Color** or adding a **Frame** color. You must uncheck Use Defaults for these options to become available. Or if not wanting floor staff to determine when to send these emails, hide the word off the screen.
 - c. Click into the **Send** tab. Place a checkmark in **Send Entry**. Some facilities may choose to send a report they have setup rather than just an email with text. If that is the case, then you will also need to check **Send Report(s)** and select the report which should be sent. Once you have selected the appropriate checkboxes, you will need to setup the Email portion of this tab. Click **Add** and navigate to where the EMAIL word is charted in the Contacts topic. Select this word and click OK to add it in.

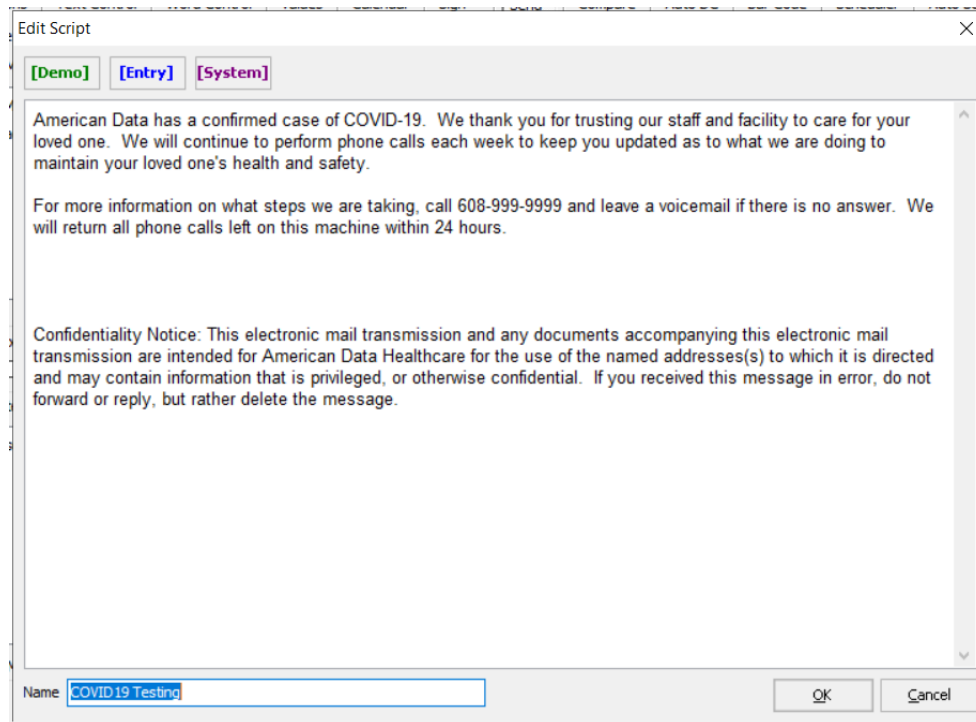


Email with no client PHI (post 10.1.3.4 update OR if in version 9)

If you would like to strip out ALL client PHI (or even just some) from the emails sent out of ECS, then you will need to be at version 10.1.3.4 to complete the following setups. Or, if you are in version 9 (any version number), the below setups will work as well.

1. Start by clicking into the **Setup** icon. Once in here, navigate to the topic in which you want to create the new word to trigger the emails in. This might be the Physician/Family Contact topic, or a topic within the Quality Assurance section.
2. Right click into a white space > select **New**.
3. Double click into the word to access word properties.
 - a. Name the **Short Name** something related to: *Send COVID-19 Email*.
 - b. Feel free to change the look of this word so it stands out more to staff by changing the **Word Color** or adding a **Frame** color. You must uncheck Use Defaults for these options to become available. Or if not wanting floor staff to determine when to send these emails, hide the word off the screen.
 - c. Click into the **Send** tab. Place a checkmark in **Send Entry**. Also place a checkmark in **Send Script**. Send Script allows you to send a specifically scripted message. This means that you can easily not include any resident data if you would like and instead just include a body of text for the email. Click the picklist box to the right of Send Script to develop the email to be sent. Click **New** to develop a brand-new script. Within the Script box, name your new Script in the lower left-hand corner of the screen, and simply type the body of text within the

box. Click OK to save the Script. Select the newly created Script from the list and click OK to add it into your new word. Click OK on the new word to save all changes.



Notice that I also chose to include our facility's confidentiality notice in the Script. However, you format the text in the Script box is exactly how it will appear within the body of the email.

Testing Setup Prior to Sending to Clients (Test)

1. Document a personal email address (one outside of your facility's network) on a fake resident within the Contacts folder.
2. Navigate to the new word you have created which triggers the COVID-19 email and chart it on that one fake resident.
3. Click Save or Sign to send the email.
4. Ensure that the email looks correct, prior to going to Step 4 below.

Sending out the Email (Step 4)

The final product will work by sending out the email to any name which has that specific word from above documented on them. To document this word on all active names at one time, follow these steps:

1. Click onto the **Toolbar** > click onto the **Automatic** icon.
2. Select **Write Multiple Names**. Click OK.
3. Select all names to document this on and click **OK**.

4. Click onto **Topic** > navigate to the topic in which you created the *Send COVID-19 Email*. Click **OK** once the topic is selected.
5. Click onto the word to chart it. Free text in any additional information you would like included in the body of the email.
6. Click **Save** or **Sign** to send out the email.

NOTE: If you need to change the wording of subsequent emails (to include the updated number of active cases, new precautions being taken, or a new phone number to call with any questions), navigate to the **Setup** icon, navigate to the Section and Topic the word is located in. Once your word is located, make any necessary adjustments in either:

- a. The **Long Name** or,
- b. If you are utilizing the Script feature, navigate to the **Send** tab > click onto the picklist box to the right of Send Script, find your Script message, highlight it, and select Edit. Once in here, make any necessary changes to the text.

Once the word is updated, it is now OK to save it within a new entry to send a new email.