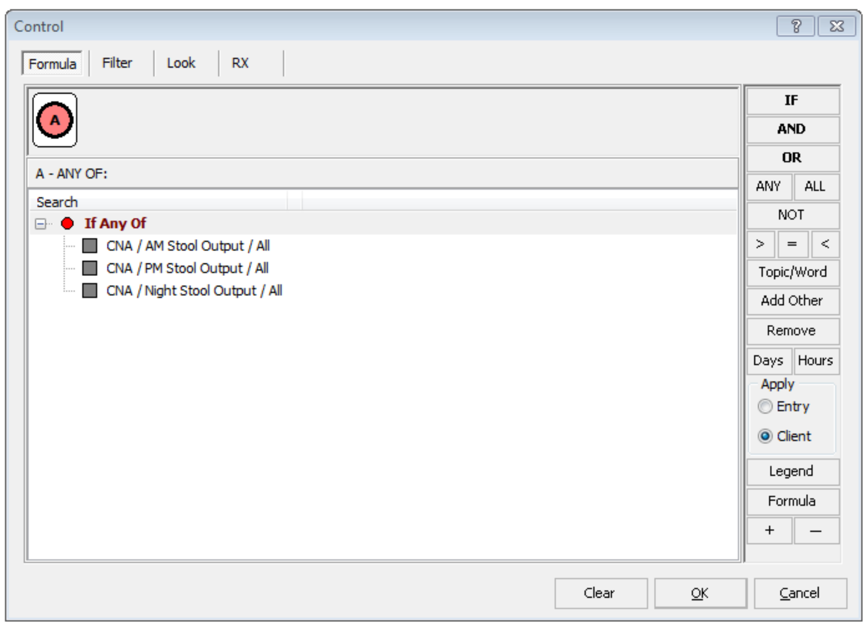
View Tasks - Setups

There are many options that may be used when viewing information. Many times information is to be viewed in a particular format; information might need to appear in a certain order, users may need to be defined, or current and discontinued entries may need to be viewed. Saving these options in a task reduces the amount of time needed to display the desired information.

Create a View Task of Topic(s) from a Single Section

1. Click the green **View** icon 

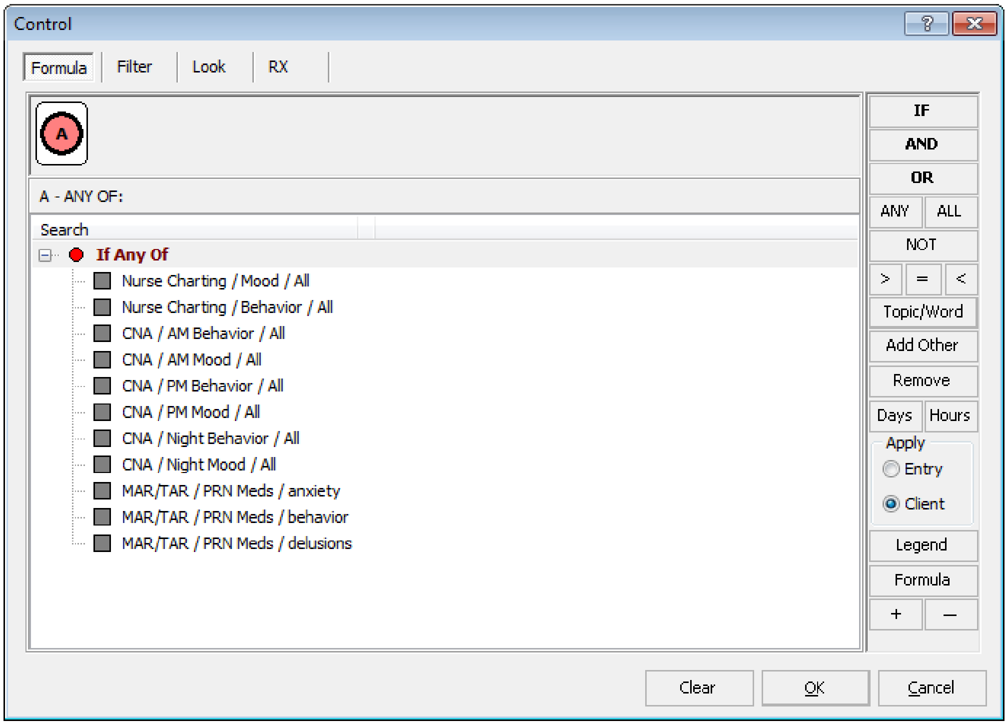
 (or click onto a **View Chart** easy access button).
2. Make sure no client is selected and click **OK.**
3. Click **Topic.**
4. Select the desired section.
5. Select the desired topic(s) and click **OK.**
6. Click **Control.**
7. Select the desired options from the Filter Tab.
8. Select the desired options from the Look Tab.
9. Click **OK.**
10. Click on **Tasks.**
11. Click **Save.**
12. Type in the name of the task and click **OK.**
13. Select the desired Site(s)/Service(s) and click **OK.**
14. Select the desired user groups and click **OK.** (When a particular facility/group is selected, only users from that facility/group are able to use the task.)



Create a View Task of Topic(s) from Multiple Sections

1. Click the green **View** icon.
2. Make sure no client is selected and click **OK.**
3. Click **Topic.**
4. Select a desired section.
5. Select the desired topics from that section and click **OK.**
6. Click **Control.**

7. Select the Formula tab.
8. Make sure that “If Any Of” is highlighted and click onto **Topic/Word** on the right-hand side.
9. Select the desired section.
10. Select the desired topics from the section and click **OK.**
11. Repeat steps 8-10 until all desired topics are included in the formula.
12. Click on the Filter Tab and select the desired options.
13. Click on the Look Tab and select the desired options.
14. Click **OK.**
15. Click **Task.**
16. Click **Save.**
17. Type in the name of the task and click **OK.**
18. Select the desired facility and click **OK.**
19. Select the desired user groups and click **OK.** (When a particular facility/group is selected, only users from that facility/group are able to use the task.)



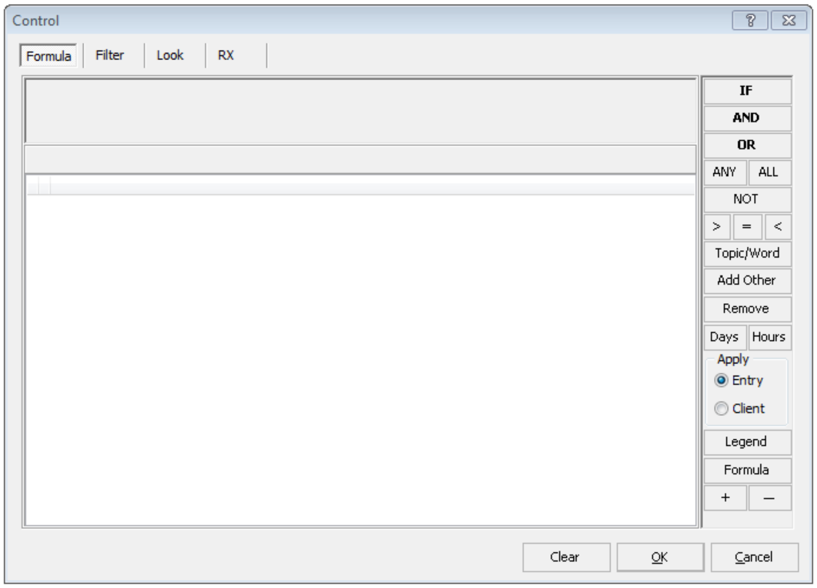
Setup Options

Formula tab

Adding a Node

- **IF** – click onto this button to construct each node to create a formula. IF is used to begin a statement (and a node). A formula may contain multiple statements.

- AND – click onto this button to construct each node to create a formula. AND is used to begin a node, but not a statement. This would be used in combination with an additional node as the user is stating the first node AND this one should apply.
- OR – click onto this button to construct each node to create a formula. OR is used to begin a node, but not a statement. This would be used in combination with an additional node as the user is stating the first node OR this one should apply.

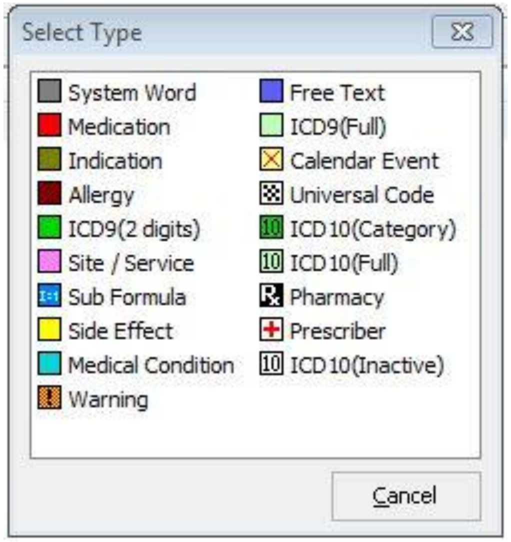


Constructing the Formula

The following options are used in combination with IF, AND, OR. They are used to construct the formula.

- ANY – to be used when the formula should search for ANY OF the defined words/topics to qualify the formula. Example: IF ANY Of "a," "b," "c," is one statement (and one node) then it will qualify if only "a" is found in the record, only "b" is found in the record, or if only "c" is found in the record.
- ALL – to be used when the formula should search for ALL of the defined words/topics to qualify the formula. Example: IF ALL Of "a," "b," and "c" is one statement (and one node) then it will qualify only if all of "a," "b," and "c" are found in the record.
- NOT – to be used to construct a formula that searches for the lack of the defined words/topics.
- >, =, < - to be used to search data that is greater than, less than, or equal to the text/value that is found within the defined words/topics. The user will be presented with additional options when utilizing any of these, which include text after word, times used, and days used. The user will then identify the number of times.
- Topic/Word – to be used when defining the words/topics to be searched within the selected nodes.

- Add Other – to be used to add something other than a word or topic into a formula. Common choices include calendar event, free text, medication, and sub formula. The following choices are available:



    - System Word – adds another topic or word, the same as the Topic/Word button.
    - Medication – used to add a medication or medication category from the Medi-Span formulary. If the user is searching for a medication, the Search In must be set to Rx data.
    - Indication – used to add an indication from the Medi-Span formulary. If the user is searching for a particular indication, the Search In must be set to Rx data.
    - Allergy – used to add an allergy from the Medi-Span formulary. If the user is searching for an allergy, the Search In must be set to Rx data.
    - Site/Service – used to specify the Site/Service of words/topics found during the formula search.
    - Sub Formula – links another formula into a node of the current formula. Sub Formulas are used frequently within the CNA Access module.
    - Side Effect – used to add a side effect from the Medi-Span formulary. If the user is searching for a side effect, the Search In must be set to Rx data.
    - Medical Condition – used to add a medical condition from the Medi-Span formulary. If the user is searching for a particular medical condition, the Search In must be set to Rx data.
    - Warning – used to add in Medi-Span interactions (e.g. Drug to Drug) to the formula.
    - Free Text – used to search for free typed text in entries.
    - Calendar Event – searches the calendar instead of the entry for the defined words/topics.
    - ICD 10 (Category) – used to add ICD10 diagnoses or categories from the Medi-Span formulary.
    - ICD 10 (Full) – used to add specific ICD10 diagnosis codes from the Medi-Span formulary.
    - Pharmacy – used to search for a Pharmacy within Script entries.
    - Prescriber – used to search for a Prescriber within Script entries.
    - ICD 10 (Inactive) – used to search for ICD10 codes that are no longer active codes, but are potentially still found within entries.

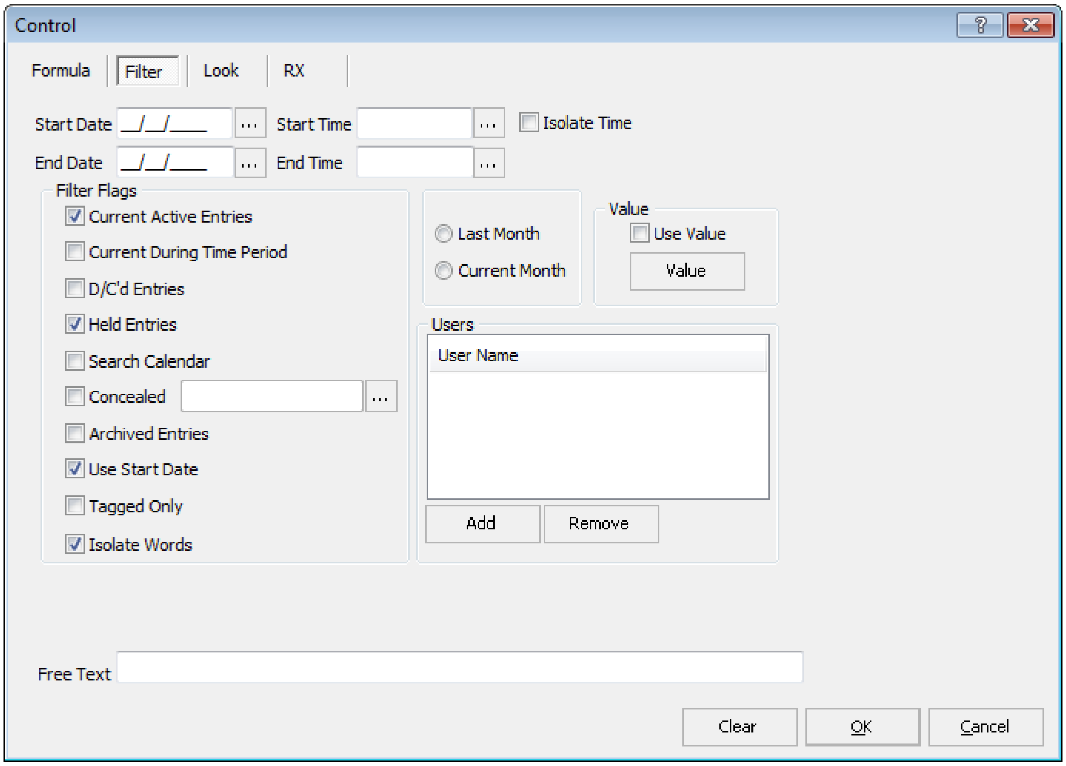
Additional Options

- **Remove** – used to remove selected (highlighted) information in the nodes area. This may include an entire node or a portion of the node.
- **Days** – used to define a look back period for the node.
- **Hours** – used to define a look back period for the node.
- **Legend** – used to see what the colors in the formula represent.
- **Formula** – used to open an already existing formula. This allows the user to access other formulas without having to close and go back into the formula screen.
- **[+, -]** – click to open or close all of the nodes.

Apply To

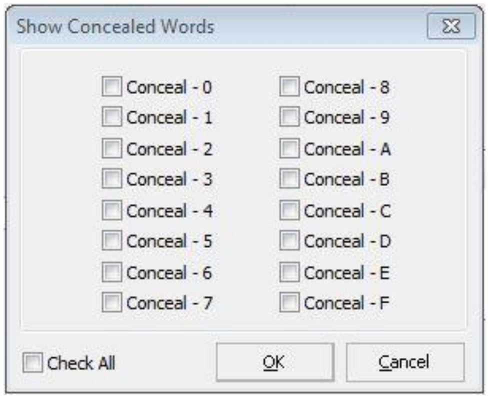
- **Entry** – used when the system is to search only within an entry for the information in the formula. When using this option, all words to be searched must be located within the same entry.
- **Client** – used when the system is to search the entire client's chart for the information in the formula.

Filter tab



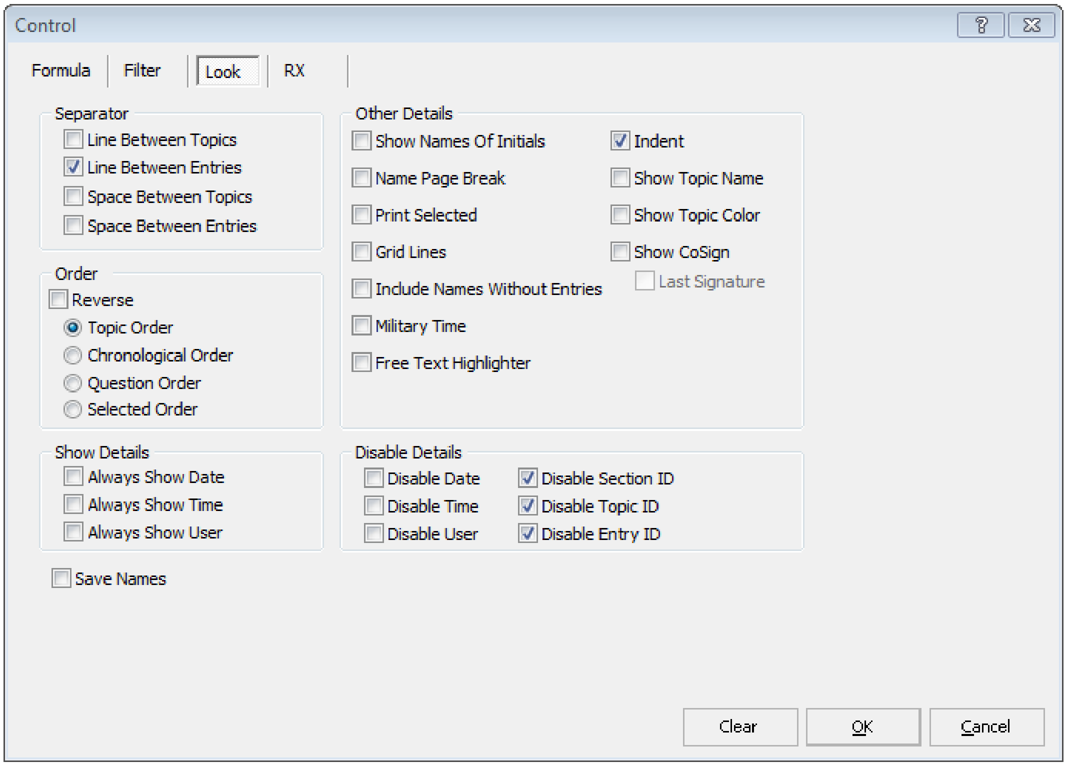
- **Current Active Entries** – all current entries written during the specific date range will appear; this will be checked by default.
- **Current During Time Period** – all entries that were current during the specified time period will appear; this may include entries that have since been discontinued. This option does not work in combination with Held Entries.

- **D/C'd Entries** – all discontinued entries written during the specified date range will appear; this option may be used in combination with Current Active Entries.
- **Held Entries** – any entries that have a status of "Held" will appear; these entries will appear in the view screen with a "Held Entry" watermark. This option does work in combination with Current During Time Period. This will be checked by default.
- **Search Calendar** – this will search for all entries that were on the calendar during the specific date range.
- **Concealed** – allows concealed words to be viewed. To select a concealed level, click the pick list box and select a level(s).



- **Archived Entries** – when this is checked, the user must also check Current Active Entries and/or D/C'd Entries. When Archived and Current Active Entries are checked, the user is able to view current entries that were archived. When Archived and D\C'd Entries are checked, the user is able to view discontinued entries that were archived.
- **Use Start Date** – when this is checked, the view screen will only look back to the most recent admission of the client. The "start date" word(s) is/are determined within the System Settings. This will be checked by default.
- **Tagged Only** – this will show only the entries in the view screen which are tagged; it assists in narrowing down the entries which are displayed on the screen. If the user was to print from here with this checked, it will only print the tagged entries.
- **Isolate Words** – when this is checked, only the words specified in the Formula tab appear in the view screen. When Isolate is not selected, the entire entry appears. This will be checked by default.
- **Last Month** – automatically populates the Start and End Date with last month's date range.
- **Current Month** – automatically populates the Start and End Date with the current month's date range.
- **Use Value** – allows the user to view values within a view screen. For example, this may be used to look at the dollar amounts associated with an ancillary charge, a HCPCS code, or the score within a risk assessment.
- **Users** – user name(s) may be added to this area by clicking [Add]. When a user(s) appears in this area, the view screen will only include entries made by that specific user(s).

Look tab



- Separator – various options available to cosmetically separate the entries or topics. If none of these options are selected, there will be no spaces or lines between entries or topics. More than one option may be chosen if desired.
    - Line Between Topics
    - Line Between Entries – this option will be checked by default, unless it is unchecked on the Review tab of System Settings.
    - Space Between Topics
    - Space Between Entries
- Order – defines the order in which the data appears.
    - Reverse – will reverse the order and can be used in combination with any other option; most commonly this is utilized with Chronological.
    - Topic Order – information appears in the order the topics are listed in the setup. This will be checked by default.
    - Chronological Order – information appears in chronological order.
    - Question Order – information appears in the order the button words are listed in the setup. The buttons are then arranged in topic order.
    - Selected Order – information appears in the exact order of the words selected.
- Show Details – defines information regarding what should display next to each entry. By default, the date/time/user will not repeat if the date/time/user is the same between different entries. If the user would like one of the items to always display next to each separate entry, then the options may be checked.
    - Always Show Date

- Always Show Time
- Always Show User

- Other Details
  - Show Names of Initials – displays the full name and job title of the user who documented the entry. By default, the user's initials will display next to each entry.
  - Name Page Break – when multiple clients' information is being viewed and printed, the user may wish to separate the clients with a page break. Placing a check here prints each client's information on its own page.
  - Print Selected – when this is selected and the view screen is printed, only the tagged information prints.
  - Include Names Without Entries – displays all clients selected, even if they do not have the desired information documented in their records.
  - Military Time – displays the information in military time.
  - Free Text Highlighter – placing a check here displays any free-typed information in blue text. This helps to more easily distinguish and troubleshoot why data may not be appearing on a calendar, report, etc.
  - Indent – the information will appear on the view screen with an indentation to assist in viewing it more easily. Indent defaults on when loading a new view screen or creating a new task.
  - Show Topic Name – this displays the name of the section and topic each entry was created in.
  - Show Topic Color – allows users to view the background color of a topic. This will only be helpful if the facility has a background color (other than white) setup on any of their charting screens.
  - Show Cosign – displays the date and initials of the user who cosigned the entry via the Electronic Co-Sign feature.
    - Last Signature – only the most recent co-signature displays on the entry, rather than all co-signatures for the entry.
- Disable Details – if the user would like any information to be disabled so that it will no longer display, any of the below options may checked. Several can be checked together at one time. Disable Section ID, Topic ID, and Entry ID will always be checked by default.
  - Disable Date
  - Disable Time
  - Disable User
  - Disable Section ID
  - Disable Topic ID
  - Disable Entry ID

Edit Existing Tasks

Existing view tasks may be edited at any time.

1. Click the green **View** icon (or click onto a **View Chart** easy access button).
2. Make sure no client is selected and click **OK.**
3. Click **Task.**
4. Select the task to be edited.
5. Click **Edit.**
6. Make the desired changes.
7. Click **OK** to save the changes.

User Group Rights

1. Click American Data - ECS and follow the path **Setup > Security > User Group**.
2. Double-click on the desired user group.
3. On the Rights tab, click the arrow next to **Task Security**, then click the arrow next to **View Task**. You can then select the functionality that the users should have access to: Save, Load, Rename, Edit, Delete.
4. Click **OK** to save your changes.