System Supervisor Summer Refresher

Key Roles as an ECS System Supervisor

Be able to effectively manage and oversee the system, which may include:

- Have a general understanding of the overall functionality of ECS.
- Audit the documentation.
- Train new users in how to use the software to meet their workflow (utilize the client sign on page to help manage training needs).
- Setup topics/words - how to customize screens and add topics and words. This includes "linking", which means that if words or topics have been added, ensuring they are linked everywhere that they need to be (reports, MDS, financial tasks, etc.)
- View screens, triggers, and common/sort tasks – understanding how to request and search for information is vital to efficiency.
- Reporting tool customization, to include calendars, graphs, and general reports.
- Keep ECS up to date with any necessary setup changes based on new regulation changes or enhancements introduced in updates.
- Apply all updates as they become available.
- Create users as new staff are hired and manage user group setups.

Although this will not be an in-depth examination of all the above, we will attempt to hit on some key system supervisor tasks in today's webinar (highlighted in red font). We also offer in depth system supervisor for billable time. If that is something you're interested in scheduling, please contact heather@american-data.com. As always, our client sign-on is available with tons of training resources, such as system supervisor videos and instructional documents.

NEW Client Sign On page!

Reference the supplemental handout attached to the webinar: Welcome-to-the-New-Client-Sign-On.

Updated System Supervisor videos to be aware of. Continue to check back for new topics to be posted!

- Word Setup – Basics
- Using Tasks & Reports
- User Setup
- User Group Setup
- System Settings
- Site Settings
- Audit Tools

If you are a new system supervisor, videos in ECS Basics would be useful as well. These include:

- Log In, Exit, Hide
- Editing Features
- Using the View Screen
- Enter a New Client

Updates

American Data typically releases two large updates each year that correlate with CMS regulation changes. These typically occur in the spring and fall. These are large updates, which include regulation changes as well as enhancements. Keep in mind that all enhancements and newly developed modules (e.g., new nursing module) are only being programmed in ECS10. Regulation changes were programmed in both versions for this year.

In between these two updates will be what we refer to as patches. A patch is a smaller update which typically only includes bug fixes and no enhancements. Dependent on when CMS releases their specifications may increase the number of patches we need to release.

We notify anyone in your facility's Client Profile that is set to receive Update Emails. If you or someone at the facility is not currently receiving these and needs to be, please email CARES@american-data.com.

It is very important to review all supporting documentation with each update. An Update Release document will always be included with each patch update and a What's New document will be included with each new update. The top portion of these documents will tell you key information, such as the minimum version required and any support documentation. If your facility is at the minimum version or a higher one, it is safe to download the update. If you are ever unsure on which update you need, you may contact our technical department.

ECS Version 10.1.3.6

Version: 10.1.3.6	**Safety Issues:** None
Minimum Version Required: 10.1.2.2	**Average Expected Down Time:** 5-15 Minutes
Pre-Release Date: 6/16/2020	**Type:** Patch
Official Release Date: 7/1/2020	**Support Documentation:** What's New 10.1.3.0
Special Instructions: None	

The next portion of the Update Release documents will include a bulleted list of all improvements made. Lastly, there are instructions on accessing and downloading the update.

In our What's New documents, we detail each new enhancement made, as well as any setup steps needed. It is very important to share these documents with those in your clinical and financial department that the changes may affect. This may include Billing Department Managers, Accounts Receivable staff, DON, ADON, MDS Coordinator, etc.

Audit Tools Available in ECS

Send Property Inquiry

- Accessed via American Data – ECS > Maintenance > Send Property Inquiry.
- Displays all IC's, Alarms, and Emails that are setup to send in ECS.
- No setup changes can be made directly from this screen, but it may be referenced to determine which users/user groups are setup to receive specific alert types.
- Sort by any column by clicking on the column heading.
- If you do not see any X, Y coordinates in the Location column, that is because those setups are not on a specific word, but rather on the entire topic, which can be accessed by right clicking on a topic and selecting Properties.
- An example of when to use this would be if a user asks to receive all the same alerts as another user. Once you have this screen loaded, you can sort by the Name column and scroll down to the username you need to mimic. Keep in mind that notifications can be setup on both usernames and user groups.

User Log

- Accessed via American Data – ECS > Maintenance > Log > User.
- Only one of the options must be selected prior to click onto OK to load the data.
- If wanting to see what a specific user views in ECS, select their username and from/to dates. There is no need to select anything in Name(s) or Section(s).
- If wanting to see all users that have viewed a specific resident's chart, use only the Name(s) option to select the resident name.
- The User Log displays columns for Client Name, Username, Section (does not narrow down to specific topics, only sections), Date, and Viewed Using (e.g., MDS, View Screen, Electronic Sign).

Change Viewer

- Accessed via American Data – ECS > Maintenance > Log > Change Viewer.
- Start by selecting a function to view by clicking on the picklist box. Popular options available in here are:
- Client Demographics (displays any changes a user made to a client, as well as when the client was created in ECS)
- General Ledger -> Lock Periods (displays who locked/unlocked each period as well as the date/time it was locked/unlocked)

- Setup Topic/Words (displays any setup changes, such as adding, deleting, renaming, or moving words; and any changes to topic properties)
- View Login (displays when users log in/out of ECS)
- Once you have selected a function to view, you may select User(s) or Topic(s), if relevant, or just select the Start/End Dates. Click Go to view the data.
- Once the data is displayed, you may click onto any column heading to sort by that column.

Email/IC

- Accessed via American Data – ECS > Maintenance > Log > Email/IC.
- Displays all E-mails or ICs that have been sent within ECS.
- The only items required prior to clicking OK to load the log are the Start/End Dates, as well as selecting either E-Mail or Internal Communication. The options for Name(s), Recipient(s), and Section/Topic(s) are optional if the user would like to narrow the search down even further.
- Once you have selected all necessary items, click OK to load the log. Any IC's or E-Mails sent during the selected time frame will display. This does not confirm whether the E-Mail or IC was read, but rather only confirms that it was sent.

View Screen

There are three different ways to navigate to the View Screen.

1. Click onto a **View Chart** button from an Access screen.
2. Click onto Toolbar > green **View** icon.
3. Navigate to **American Data – ECS** > **View** > **Entry**.

The View Screen allows the user to review selected information. Select the desired name(s) and click **OK**. Once inside the View Screen, click either **Topic** or **Task**, and select the desired Section/Topic or load the desired task. Then click **Go**. To narrow the dates for review, click onto **Date From** and/or **Date To** and click **Go**.

- The View Screen may be printed by clicking onto the **Print** button located under the **More…** option.
- Adjust the font size by clicking **More…** and click onto the big or little "**A**".
- Search for words within the View Screen by clicking **More…** and onto the magnifying glass symbol. Type in the text to be searched and click **OK**. This feature will search both words that were clicked on within a topic as well as free text.
    - Click the arrow to the right of the search feature to have it bring you to the next found word.

Topic

Clicking onto **Topic** allows the user to navigate through the Sections and Topics that they have access to. Users may even select a specific word within a topic to narrow their search down further. For example, if a user wants to view only "observed falls" rather the entire Fall/Incident topic, they would click Topic > Nursing > Double click into the Fall topic > click onto the "observed fall" word and click OK and then Go.

Task

Clicking onto **Task** allows the user to load pre-determined task items. Once a task is highlighted, click Load, and Go. Examples of tasks include: Blood Pressures, Diagnoses, Fall List Past 31 Days, Infections – Unresolved, Medication Review (Psychotropics), Pain Review, and Vital Signs.

Control Button

The **Control** button within the View Screen gives the user more options as to how they would like to view the information. Most used options within here are listed below.

Filter Tab

- **D/C'd Entries –** Displays all discontinued entries. No entry is ever completely removed from ECS, but rather it will be stored in a discontinued status.
- **Users –** Use this to narrow down the charting being viewed to only entries made by a specific user(s). This is a useful tool when wanting to audit a user's charting.
- **Free Text –** Allows the user to search within the charting on the view screen for a specific free typed word. If wanting to search all fall notes for a specific caregiver's name, type their name into the **Free Text box**, click **OK**, and **Go**.

Look Tab

- **Separator –** For ease of viewing, the user may choose to add lines/spaces between entries or topics.
- **Order –** Allows the user to determine the order in which the entries display on the screen. View tasks can be saved with a specific order (for example, Reverse Chronological) if there is a preferred viewing method within a certain task.
- **Show Name of Initials –** Displays the full name and title of the person who entered/discontinued each entry.
- **Free Text Highlighter –** Used frequently when troubleshooting as it will turn all free text on the view screen blue. For example, if a care plan approach does not appear on the report, it may be because the user free typed the word "Nursing Approach" instead of clicking onto the button word for the word.
- **Show Topic Name –** Displays the topic name that the entry was documented in. Used frequently when needing to troubleshoot specific entries.

Helpful Tool

Anywhere in ECS where you see a "?" symbol, this signifies that you can click onto it and click onto a feature you are unsure about (for example, Name Page Break). A Help Pop-up box will appear with information regarding that feature.