Access Screens / Easy Buttons

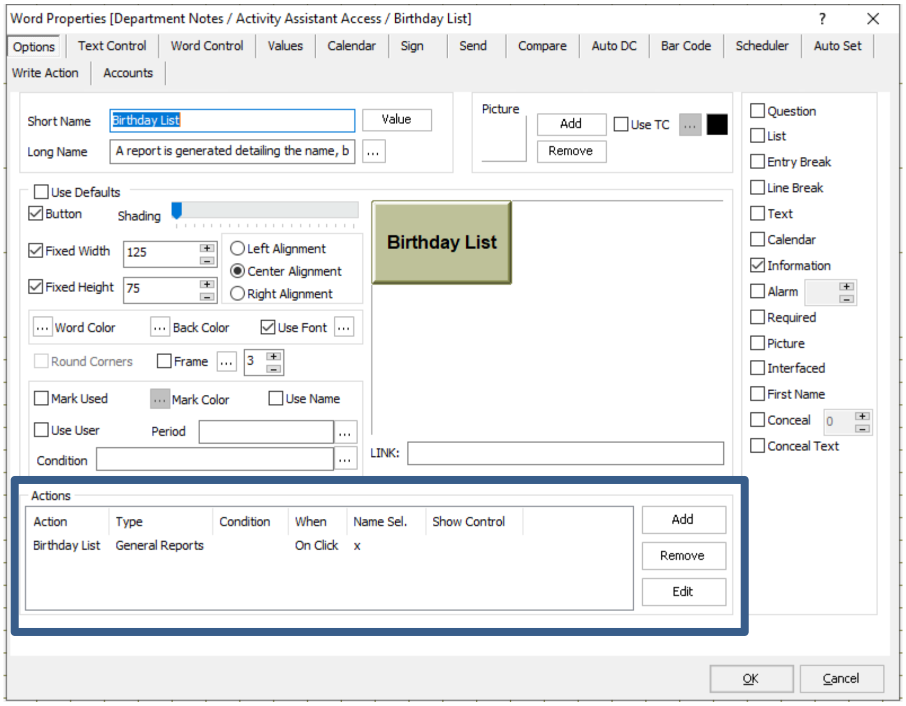
Access Screen Overview

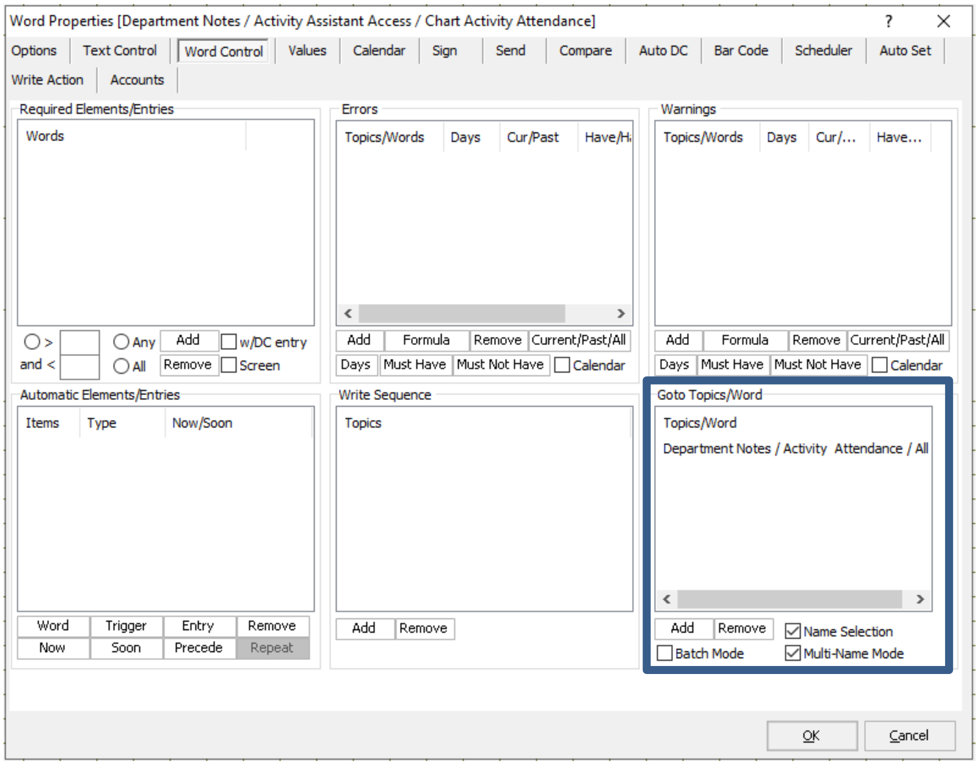
Access screens are intended to serve as a dashboard or landing page for each user group within ECS. Each button is a shortcut to either a topic, a specific task, or launches a menu item. Access screens may be customized to meet the workflow of each user group. Your facility may already have access screens that just need to be adjusted, or you may want to build brand new Access screens from scratch. A third option would be to get our access screens merged into your facility's database and they can then be linked up from there. Please contact clinical@american-data.com for a detailed estimate if interested in this option.

Below, we review creating an access screen from scratch, editing an existing access screen, and provide several different examples for linking tasks to a button.

Access screens have buttons that may be linked one of two ways.

1. Via the **Actions** on the Options tab, or
2. Via a Topic listed in **Goto Topics/Words** on the Word Control tab.

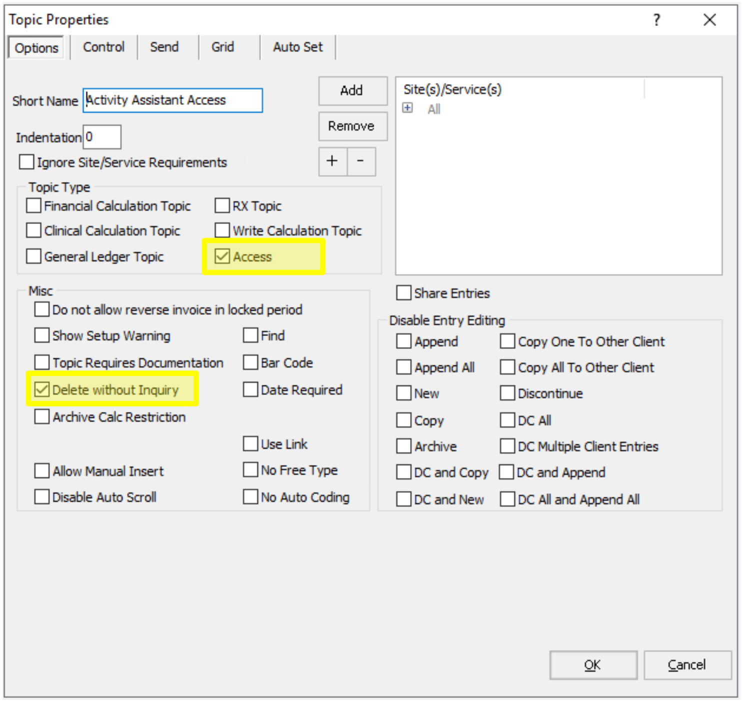




Create New Access Screen Topic

Creating a new access screen is the same as creating a brand-new topic in ECS, however there are just a few specific differences.

Click into the **Setup** icon on your Toolbar. Once in here, navigate to the section you want the new access screen to be setup within. Right click into a white space and select **New**. The system will confirm you are wanting to add a new topic. Click **Yes**. Name your new topic by filling in the **Short Name**. Place a checkmark in Access and Delete without Inquiry. Click **OK** to save your new topic.



Once the topic is created, double click into the folder to access the topic itself. Rather than adding in new words that can be documented, buttons will be created that can act as shortcuts to other areas within ECS. We recommend copying access buttons from another access screen into your new topic, to keep formatting consistent across all screens. Once buttons are created within the new topic, they are ready to be linked to Actions or Topics. Details for this are in the *Linking Access Buttons* section.

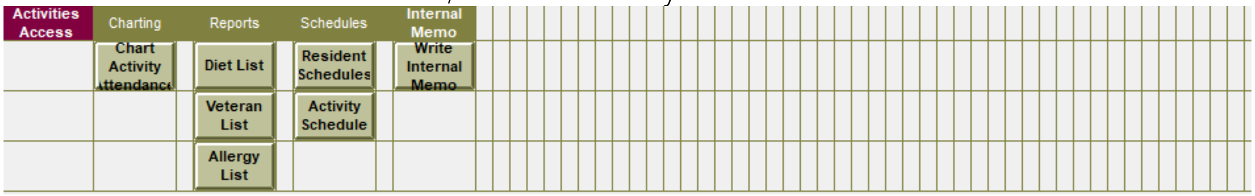
Edit Existing Access Screen

To access an existing access screen to make necessary adjustments to it, start by first navigating to the access screen. Once you have navigated to it, click onto Toolbar > Setup. This will open the access screen you are on in a setup mode, allowing changes to be made.

To adjust the name that displays on a button, either double click onto the button or right click and select Properties. Once in here, adjust the Short Name appropriately. Only the short name will display on a button, so the long name may be ignored. If however, you notice that the long name is populated for your access buttons, that means it is being used for informational purposes (if a user right clicks onto an access button, it tells them what the button does – whatever is displayed in the long name will show). Feel free to adjust the long name as well or remove any text out.

To remove a button that is no longer needed, do not move this button off the screen (as users are educated to do in documenting screens), but rather delete the button off the screen. Buttons cannot be moved out of focus on an access topic as it will stretch the screen out to attempt to fit all buttons (maximum display) and will scrunch up all buttons. To delete a button, right click onto it and select Delete. Prior to doing this, you may want to check the topic properties and ensure that Delete without Inquiry is checked on this topic.

If an access screen is loading for users and appears like the below screen shot, this would mean that a button was moved off the screen rather than deleted. Keep in mind that access screens cannot be charted in and only house shortcut information buttons. There is no need to move the button off the screen, but rather it may be deleted.



Linking Access Buttons

To an Action

Right click onto an access button or double click to access the properties of the button. The properties screen defaults to the Options tab, which is the one that is needed to link the button to an action.

The three different types of action types a button may be linked to:

- Task(s) – can link to any task type within ECS, all options listed below.
    - Clinical (Electronic CoSign, Electronic Sign, General Report Tasks, MDS Report, Reports, Triggers, Trigger Tasks, Stat Reports, Forms)

- Financial (AP Aging/View, AR Aging/View, Calculate Financial, Clearing, Financial Files, Financial Forms, Financial Reports, Financial Report Tasks, Payables/Adj, Receipts/Adj, View Journals, Auto Adjustments)
- Shared (Calendar, Hybrid View, Hybrid Write, Scheduler RUG Forecast, Templates, View, Write, HL7, Graph Reports, Graph Report Tasks, Charge Master, Report Panel)

- Menu – can link to any of the options found in the American Data – ECS dropdown menu in the upper left-hand corner of ECS.
- Icon – can link to any of the icon options listed on the Toolbar.

Utilize the options for Add, Remove, and Edit to either link the button or edit what is currently linked there.

Once you click onto Add, you will first need to select the Action type (Pick Task(s), Pick Menu, or Pick Icon). Once this is selected, you will need to select details as to which specific action should launch.

Once the action type is selected, it will appear in Name and Action Type. Additional items on this screen may need to be selected:

- Name List – the default setting in our current system is for all buttons is to have "Name Selection" checked. However, that is most likely not the case at all facilities. You will want to determine whether your current buttons have a "Name Selection" popup once they are clicked onto or not.
  - Multi-Name should only be checked if when the user launches the button, the entry they make should be charted on ALL selected name(s). The only place this is currently utilized widely is for Activity Attendance so that users only need to chart their entry one time for all selected name(s).
  - Default – will display the user's default name list. This is also the option that for most buttons can remain as is (as Default is what will check when Name Selection is selected)
  - Client – will display the Client Selection when clicked onto.
  - Vendor – will display the Vendor Selection when clicked onto. This would only be relevant for Accounts Payable buttons.
  - Provider – will display the Provider Selection when clicked onto. This would only be relevant for Human Resources or potentially some Scheduler buttons.
- Control – this option will light up only for specific task types. When the button is clicked onto, if this option is checked, the user will be prompted to select dates prior to the task launching. This will be checked on most View Tasks but cannot be linked on Report Tasks (the option for dates is linked in the report itself) and will be linked sometimes for Electronic Sign (MAR/TAR) tasks as well.
- When To Run – access buttons should always be saved with On Click checked (which is the default).

To a Topic/Word

Right click onto an access button or double click to access the properties of the button. The properties screen defaults to the Options tab, switch to the **Word Control** tab to link the button to a specific topic/word.

An access button may only be linked to one topic/word within the Goto Topic/Words section. If there are several topics that the user must be brought to after clicking onto a button, then a Write Task must be created to include all these topics. This Write Task would then be linked via the Actions option.

This option will only work if the user needs to be brought to one topic or to a specific location within a topic. An example of this may be if a button is created to enter weights, but weights are located in a topic with other vital signs, a button could be linked to the specific word "WEIGHT" in the topic so that when the topic does load, it also jumps over to that specific word to make it more efficient for the end user.

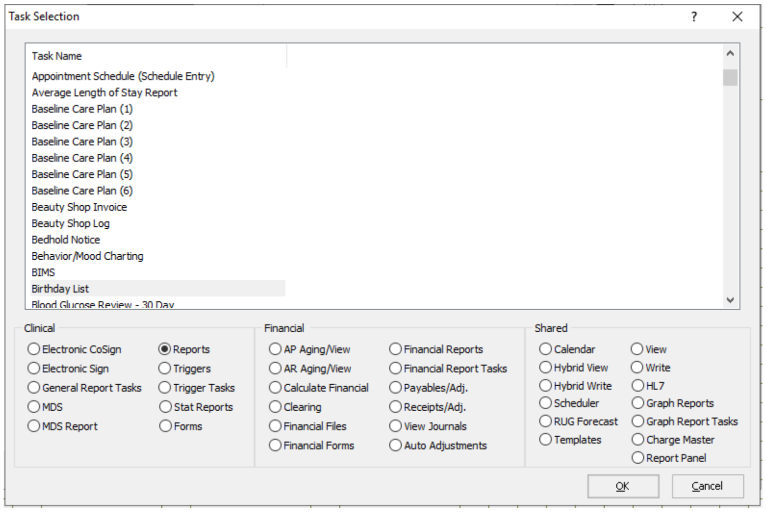
To link the button in this manner, click onto the **Add** button. Navigate to the topic or word to link the button to. Select the topic or word and click **OK.** Once back in the Word Control tab, determine whether **Name Selection** needs to be checked. The default setting in our current system is for all buttons is to have "Name Selection" checked. However, that is most likely not the case at all facilities. You will want to determine whether your current buttons have a "Name Selection" popup once they are clicked onto or not. **Multi-Name Mode** should only be checked if when the user launches the button, the entry they make should be charted on ALL selected name(s). The only place this is currently utilized widely is for Activity Attendance so that users only need to chart their entry one time for all selected name(s). **Batch Mode** is not currently utilized, except for in some specific instances in the AR module.

Examples

Example 1: Linking a report to an easy access button

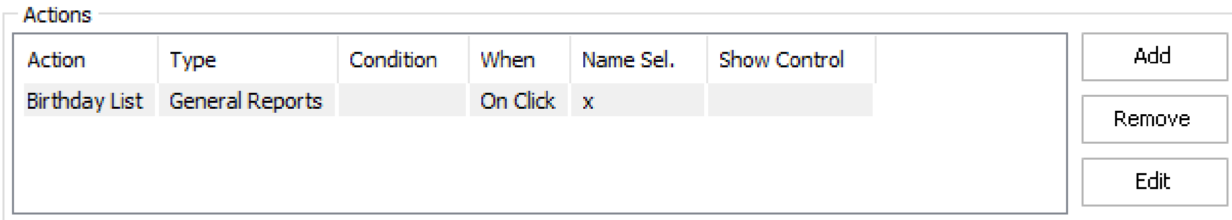
To link a Birthday List report to an easy access button, down in the Actions area, click **Add** to pop up the Action Details box.

- Select **Pick Task(s)**. A task selection screen will pop up and the desired type of task and task name will need to be selected. The Birthday List report can be found under Clinical > Reports.
- Select Birthday List and then click **OK**, the Action Details box will appear again with the desired task displayed.
- Place a checkmark in the Name Selection box so that the list of names pops up when launching the report.



- When To Run area defaults to "On Click" which is where it should remain.

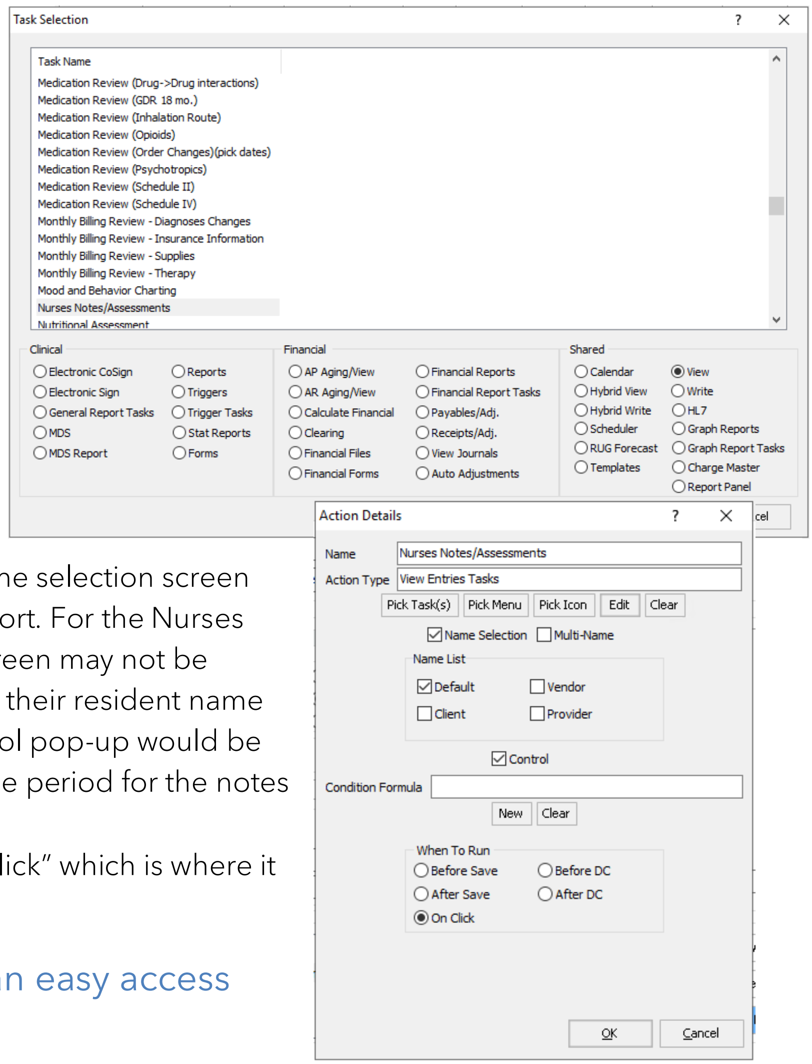
Once the desired selections are made, click **OK**. The selected action should appear as below:



Example 2: Linking a view task to an easy access button

To link a Nurses Notes view task to an easy access button, down in the Actions area, click **Add** to pop up the Action Details box.

- Select **Pick Task(s)**. A task selection screen will pop up and the desired type of task and task name will need to be selected. The Nurses Notes view task can be found under Shared > View.
- Select the Nurses Notes task, then click **OK**, the Action Details box will appear again with the desired task displayed.



- Select if you would like to have a name selection screen pop up when launching the task/report. For the Nurses Notes example, a name selection screen may not be desired if users are already selecting their resident name in the side panel, however the Control pop-up would be desired so that users can select a time period for the notes they wish to view.
- When To Run area defaults to "On Click" which is where it should remain.

Example 3: Linking a calendar to an easy access button

To link a Lab Schedule to an easy access button, down in the Actions area, click **Add** to pop up the Action Details box.

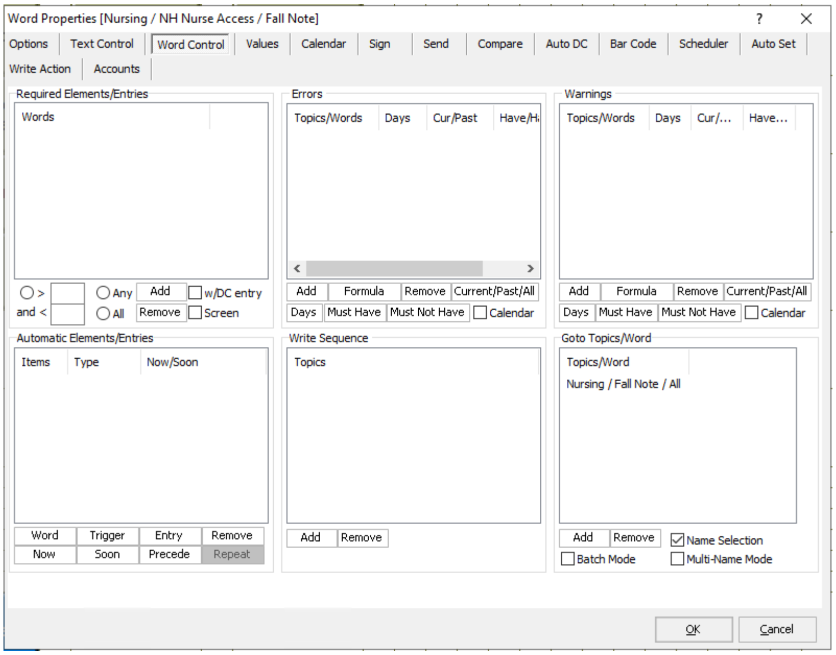
- Select **Pick Task(s)**. A task selection screen will pop up and the desired type of task and task name will need to be selected. The Lab Schedule can be found under the Shared > Calendar.

- Select Lab Schedule and then click **OK**, the Action Details box will appear again with the desired task displayed.
- Place a checkmark in the Name Selection box so that the list of names pops up when launching the report.
- When To Run area defaults to "On Click" which is where it should remain.

Example 4: Linking a topic to an easy access button

To link the Fall Note Topic to an easy access button, click on the **Word Control Tab**, click **Add** in the **GoTo Topics/Word Box.**

- Navigate to the Nursing Tab > click on the Fall Note Topic and hit **OK.**
- Once you have your topic in the GoTo Topic/Word you will want to place a checkmark in Name Selection.
- Once the desired selections are made, click **OK**. The selected action should appear as seen here.



Example 5: Linking user setup screen to an easy access button

To link the User Properties screen to an easy access button, down in the Actions area, click **Add** to pop up the Action Details box.

- Select **Pick Menu**. A select menu item screen will pop up. Utilize the + to maximize the options necessary to locate the necessary menu item.
- Click the + the left of Setup and then Security. Highlight **User**. Click **OK**.
- When To Run area defaults to "On Click" which is where it should remain.