

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 <u>clinical@american-data.com</u> 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.

Word Properties [Department Notes / Activity Assistant Access / Birthday List]	? ×
Options Text Control Word Control Values Calendar Sign Send Compare Auto DC Bar Code	Scheduler Auto Set
Write Action Accounts	
Write Action Accounts Short Name Stribdsy List Long Name A report is generated detailing the name, b Use Defaults Remove Use Defaults Stribday List Ø Button Shading Fixed Width 125 © Center Algoment Scatter Algoment Word Color Back Color Wuse Form 3 Mark Used Mark Color Use Viser Period LINK: Action	Question List Entry Break Text Calendar Information Alarm Picture Distraced First Name Conceal
Action Type Condition When Name Sel. Show Control Adu	
Remove	
Edit	
	<u>OK</u> <u>C</u> ancel



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Word Properties [Department Notes / Activity As Options Text Control Word Control Value	-	Auto DC Bar Code Scheduler Auto Set
Write Action Accounts	s Calendar Sign Send Compare /	Auto De Dai code Scheddler Auto Set
Required Elements/Entries	Errors	Warnings
Words	Topics/Words Days Cur/Past Have/Hi Add Formula Remove Current/Past/All	Topics/Words Days Cur/ Have
and < All Remove Screen	Days Must Have Must Not Have Calendar	Days Must Have Must Not Have Calendar
Automatic Elements/Entries	Write Sequence	Goto Topics/Word
Items Type Now/Soon	Topics	Topics/Word Department Notes / Activity Attendance / All
Word Trigger Entry Remove	Add Remove	Add Remove Name Selection
Now Soon Precede Repeat		Batch Mode Multi-Name Mode

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

	Add	Site(s)/Service	(-)		
ort Name Activity Assistant Acces	is Add	Site(s)/Service All	(5)		
dentation 0	Remove	•			
Ignore Site/Service Requirement	ts + -				
Topic Type					
Financial Calculation Topic	RX Topic				
Clinical Calculation Topic	Write Calculation Topic				
General Ledger Topic	Access				
Misc		Share Entries	;		
Do not allow reverse invoice i		Disable Entry Edit	ing		
Show Setup Warning	Find	Append	Copy One To Other (Client	
Topic Requires Documentation	n 🔄 Bar Code	Append All	Copy All To Other Cli	ent	
Delete without Inquiry	Date Required	New	Discontinue		
Archive Calc Restriction		Сору	DC All		
	Use Link	Archive	DC Multiple Client Ent	ries	
Allow Manual Insert	No Free Type	DC and Copy	DC and Append		
Disable Auto Scroll	No Auto Coding	DC and New	DC All and Append Al		

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.

Activities Access	Charting	Reports	Schedules	Internal Memo														
	Chart Activity	Diet List	Resident Schedules	Write Internal Memo														
		Veteran List	Activity Schedule															
		Allergy List																

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.

Task Name Appointment Schedule (Schedule Entry) Average Length of Stay Report Baseline Care Plan (1) Baseline Care Plan (2) Baseline Care Plan (3) Baseline Care Plan (3) Baseline Care Plan (5) Baseline Care Plan (5) Baseline Care Plan (6) Beauty Shop Invoice Behavior /Mood Charting BitMs BitMs BitMs BitMs Clinical Financial Plactonic CoSign AR Aging/New Financial Report BitMs Clinical Financial Plactonic CoSign AR Aging/New Clinical AR Aging/New Clinical Plactonic CoSign AR Aging/New Clinical Plactonic CoSign AR Aging/New Clinical Plactonic CoSign Clicetonic Sign Clicetonic Sign Financial Plactonic CoSign Clicetonic Sign Financial Plactonic CoSign Financial Financial Plactonic CoSign Financial Financial Plactonic CoSign Financial Financia	k Selection						? >
Inical Financial Shared OElectronic CoSign ® Reports AP Aging/New Financial Reports O Calendar View DElectronic Sign Triggers AR Aging/New Financial Report Tasks O Hybrid View Write General Report Tasks O Trigger Tasks O Calendar O Write HL7 MDS O State Reports O Calering O Receipt/Adj. O Stheduler Graph Reports MDS Report O Financial Files View Journals O RUB Forecast O Graph Report Tasks	Appointment Schedule (Sr. Average Length of Stay F Baseline Care Plan (1) Baseline Care Plan (2) Baseline Care Plan (3) Baseline Care Plan (4) Baseline Care Plan (5) Baseline Care Plan (6) Beauty Shop Log Bednold Notce Behavior /Mood Charting BIMS Birthday List	Report					~
O Report Panel	 Electronic CoSign Electronic Sign General Report Tasks MDS 	 Triggers Trigger Tasks Stat Reports 	AP Aging/View AR Aging/View Calculate Financial Clearing Financial Files	 Financial Report Tasks Payables/Adj. Receipts/Adj. View Journals 	Calendar Hybrid View Hybrid Write Scheduler RUG Forecast	O Write O HL7 O Graph Re O Graph Re O Charge M	port Task: laster



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: Actions

Action	Туре	Condition	When	Name Sel.	Show Control	Add
Birthday List	General Reports		On Click	x		Remove
						Edit

Task Selection

Task Name

Medication Review (Opioids)

Mood and Behavior Charting Nurses Notes/Assessments

Nutritional Assessment Clinical

O Electronic CoSign

O Electronic Sign

O MDS Report

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

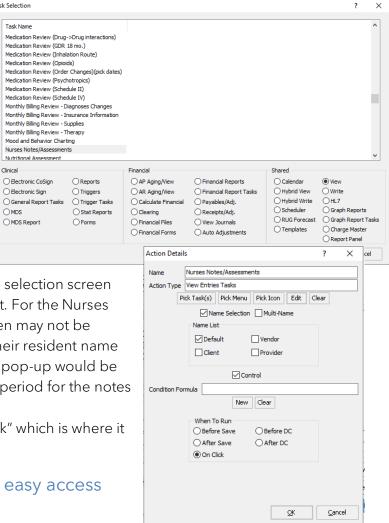
To link a Nurses Notes view task to an easy access button, down in the Actions area, click Add to pop up the Action Details box.

- 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.

rite Action Accounts									
Required Elements/Entries		Errors				Warnir	ngs		
Words		Topics/Wor	ds Days	Cur/Past	Have/H	Topics	s/Words I	Days Cur/	Have
	Add w/DC ent	,		emove Currer Not Have		Add Days	Formula Must Have	Remove C Must Not Have	urrent/Past/A
Automatic Elements/Entrie	s	Write Seque	nce			Goto T	opics/Word		
Items Type I	Now/Soon	Topics					:/Word ng / Fall Note	: / All	
Word Trigger Now Soon	Entry Remove Precede Repeat	Add R	move			Add	Remove	Name Sel	

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.

Select Menu Item		?	×
🕂 ·· View			
- Print			
···· Locate			
🗄 🛛 Setup			
Haintenance			
. Window			
Hide ECS			
Exit			
	<u>o</u> k	<u>C</u> ance	el