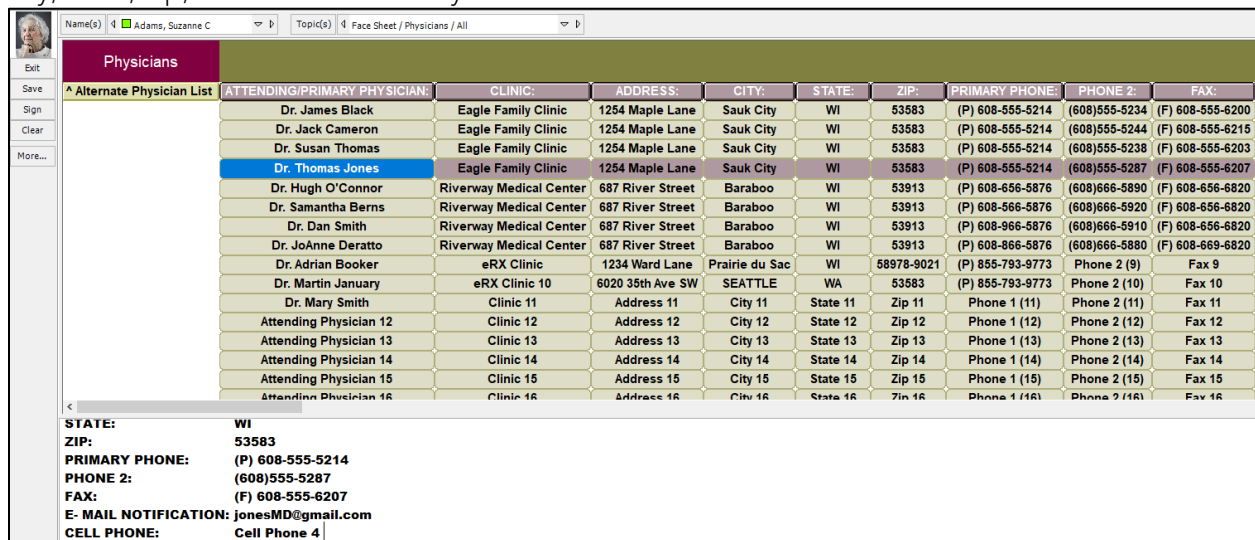


Adjusting rows within a face sheet topic

When a facility first implements ECS, the trainer at American Data will assist in setting up all face sheet topics so that they include the list your facility needs displayed. However, if in the future additional rows are needed, such as a new physician starts, or a new hospital is built; a facility may need to add these into the face sheet topics. The reason adding new rows into these topics is different than other areas of ECS is because once a word is clicked onto it, it automatically documents everything within that row.

As you can see below, I have clicked onto Dr. Thomas Jones. In doing so, the clinic, address, city, state, zip, etc. all automatically documented with his name.



ATTENDING/PRIMARY PHYSICIAN:	CLINIC:	ADDRESS:	CITY:	STATE:	ZIP:	PRIMARY PHONE:	PHONE 2:	FAX:
Dr. James Black	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5234	(F) 608-555-6200
Dr. Jack Cameron	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5244	(F) 608-555-6215
Dr. Susan Thomas	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5238	(F) 608-555-6203
Dr. Thomas Jones	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5287	(F) 608-555-6207
Dr. Hugh O'Connor	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-666-5876	(608)666-5890	(F) 608-666-6820
Dr. Samantha Berns	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-666-5876	(608)666-5920	(F) 608-666-6820
Dr. Dan Smith	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-966-5876	(608)666-5910	(F) 608-666-6820
Dr. JoAnne Deratto	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-866-5876	(608)666-5880	(F) 608-669-6820
Dr. Adrian Booker	eRX Clinic	1234 Ward Lane	Prairie du Sac	WI	58978-9021	(P) 855-793-9773	Phone 2 (9)	Fax 9
Dr. Martin January	eRX Clinic 10	6020 35th Ave SW	SEATTLE	WA	53583	(P) 855-793-9773	Phone 2 (10)	Fax 10
Dr. Mary Smith	Clinic 11	Address 11	City 11	State 11	Zip 11	Phone 1 (11)	Phone 2 (11)	Fax 11
Attending Physician 12	Clinic 12	Address 12	City 12	State 12	Zip 12	Phone 1 (12)	Phone 2 (12)	Fax 12
Attending Physician 13	Clinic 13	Address 13	City 13	State 13	Zip 13	Phone 1 (13)	Phone 2 (13)	Fax 13
Attending Physician 14	Clinic 14	Address 14	City 14	State 14	Zip 14	Phone 1 (14)	Phone 2 (14)	Fax 14
Attending Physician 15	Clinic 15	Address 15	City 15	State 15	Zip 15	Phone 1 (15)	Phone 2 (15)	Fax 15
Attending Physician 16	Clinic 16	Address 16	City 16	State 16	Zip 16	Phone 1 (16)	Phone 2 (16)	Fax 16

STATE: WI
ZIP: 53583
PRIMARY PHONE: (P) 608-555-5214
PHONE 2: (608)555-5287
FAX: (F) 608-555-6207
E-MAIL NOTIFICATION: jonesMD@gmail.com
CELL PHONE: Cell Phone 4

To ensure that the above setup occurs, you will need to adjust all items located in the Automatic Elements/Entries of the newly added in row.

Topics within the face sheet that may be affected by this setup include:

- Primary Insurance Profile
- Secondary Insurance Profile
- Physicians
- Consults
- Church
- Funeral Home
- Hospital
- Nursing Home
- Pharmacy
- Transportation
- Hospice Profile

Add New Rows

To add a new row into any of the above topics, follow the steps outlined below.

1. Click onto the **Toolbar** and click onto the **Setup** icon.
2. Navigate to the Face Sheet or Demographics tab.
3. Double click into the topic where you need to add a new row into.
4. Within the topic, scroll down in the screen to see if there are additional blank lines hidden down lower in the screen. It is always easier to just simply move up an existing line of words than to create new ones from scratch.
 - a. **If this is the case** and there are rows of words, highlight an entire row (hold down the Ctrl key on your keyboard and select all words within the row), and right click and select **Move**. Then scroll back up in the screen and left click your mouse into the white space where you would like the row to be. Then update the short name (long name if needed) on each of the words within the row.
 - b. **If this is not the case** and there are no already existing blank rows below that can be used, then you will need to create new words from scratch and link them up (jump below to step #6 to continue with the setups).
5. Right click onto each of the newly moved up words and select **Properties** (or double click onto the word). Enter the appropriate information into the **Short Name**. If the entire text does not fit in the Short Name, utilize the **Long Name** as well. Keep in mind that the Long Name is not meant to be a continuation of what did not fit into the short name, but rather should contain all text which should document when clicked onto. Click **OK** to save the changes made to the text.

If no rows are available and new ones need to be created, follow the steps here.

6. Right click into a white space and select **New** to add in a new word. Add in enough words to fill the row to match what other rows above have. For example, Funeral Home may need eight new words added, whereas Physicians may need 11 new words added.
7. Right click onto each of the newly created words and select **Properties** (or double click onto the word). Enter the appropriate information into the **Short Name**. If the entire text does not fit in the Short Name, utilize the **Long Name** as well. Keep in mind that the Long Name is not meant to be a continuation of what did not fit into the short name, but rather should contain all text which should document when clicked onto. Click **OK** to save the changes made to the text.
8. Once all words have been populated, click into the **Properties** of the first word in the row (typically this is funeral home name, attending/primary physician, insurance company, etc.).
 - a. Navigate to the **Word Control** tab.
 - b. In the lower left-hand corner in **Automatic Elements/Entries**, click onto **Word**.
 - c. This will bring you into the topic you are currently in, where you will want to select the words in this order:

- i. Heading word for the column this word is in (e.g., ATTENDING/PRIMARY PHYSICIAN, FUNERAL HOME).
- ii. Next column's heading word (e.g., CLINIC, DIRECTOR).
- iii. Next column's word (e.g., Prairie Clinic, Director Kyle Jones).
- iv. Continue to select each column's heading word with their word until all have been highlighted.
- v. Click **OK** to add all words into the Automatic Elements/Entries box.
- vi. Highlight the heading word that should document before the word you are completing these setups in and click onto **Precede**.
- vii. Click **OK** to save changes.

Examples of the **Word Control > Automatic Elements/Entries** section of a couple of different Face Sheet topics.

Funeral Home example (the below is setup on the word *Prairie Funeral Home & Cremation*)

FUNERAL HOME:	Precede
DIRECTOR:	Now
Tim Jones	Now
ADDRESS:	Now
1236 Main St	Now
CITY:	Now
Prairie du Sac	Now
STATE:	Now
WI	Now
ZIP:	Now
53578	Now
PHONE 1:	Now
608-956-6459	Now

Attending Physician example (the below is set up on the word *Dr. Hannah Jones*)

ATTENDING/PRIMARY PHYSICIAN:	Precede
CLINIC:	Now
Eagle Family Clinic	Now
ADDRESS:	Now
189 Maple Lane	Now
CITY:	Now
Sauk City	Now
STATE:	Now
WI	Now
ZIP:	Now
53583	Now
PRIMARY PHONE:	Now
608-989-5600	Now
PHONE 2:	Now
(word left blank)	Now
FAX:	Now
608-989-5601	Now

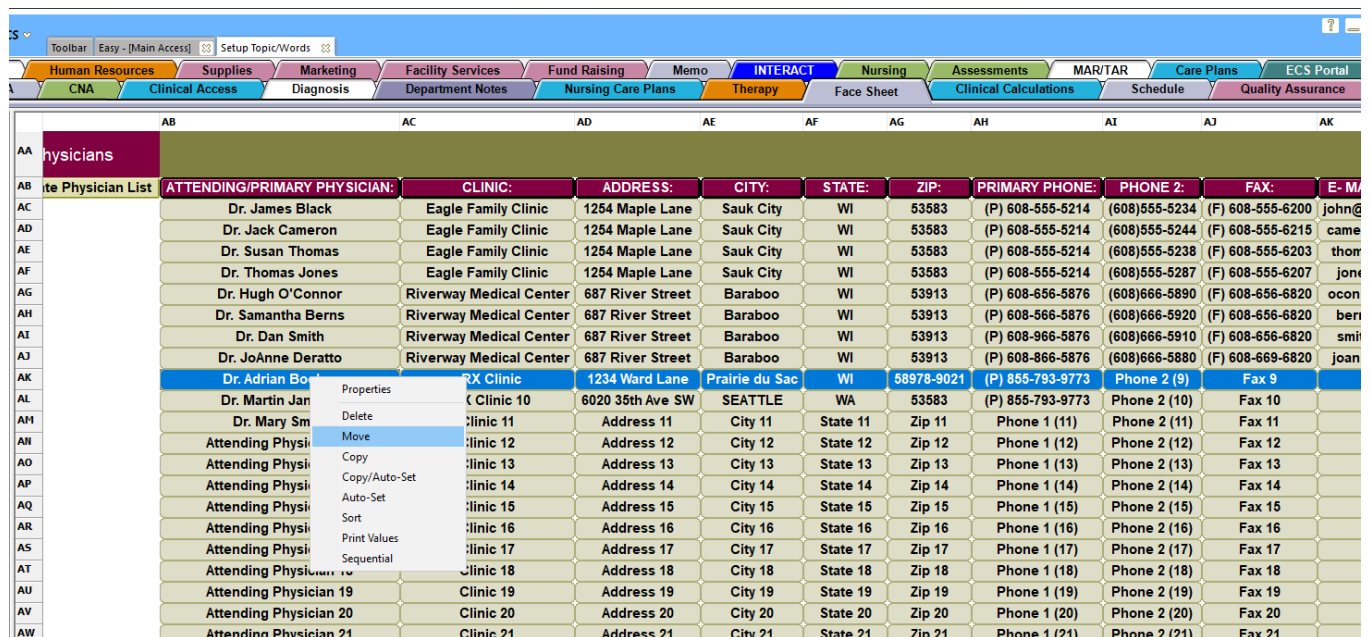
E-MAIL:
hjones@eaglefamily.com

Now
 Now

Move Rows No Longer Needed

In a situation where a row is no longer needed (e.g., a funeral home closes, a physician is no longer seeing anyone at the facility, etc.) a row can be moved off the screen so that users no longer see it as “active” and chart it in a record. **Words should never be deleted out of ECS** as this will remove all instances of them in past entries as well. Rather, rows should just be moved off the screen.

1. Click onto the **Toolbar** and click onto the **Setup** icon.
2. Navigate to the Face Sheet or Demographics tab.
3. Double click into the topic where you need to move row(s) in.
4. Find the row that you would like to move and highlight all words within the row (hold down the Ctrl key on your keyboard as you select each word). Right click onto one of the highlighted words and selected **Move**.
5. Scroll down within the screen and left click your mouse in a white space to drop the row into that spot. Some facilities move excess rows down whereas others move them all the way off to the right. Either way is fine, they should just be moved “out of plain site” of the end user so that it does not appear that it can be chosen from anymore.



Physician List	ATTENDING/PRIMARY PHYSICIAN:	CLINIC:	ADDRESS:	CITY:	STATE:	ZIP:	PRIMARY PHONE:	PHONE 2:	FAX:	E-MAIL:
AC	Dr. James Black	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5234	(F) 608-555-6200	john@
AD	Dr. Jack Cameron	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5244	(F) 608-555-6215	came
AE	Dr. Susan Thomas	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5238	(F) 608-555-6203	thor
AF	Dr. Thomas Jones	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5287	(F) 608-555-6207	jon
AG	Dr. Hugh O'Connor	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-656-5876	(608)666-5890	(F) 608-656-6820	ocon
AH	Dr. Samantha Berns	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-566-5876	(608)666-5920	(F) 608-656-6820	ber
AI	Dr. Dan Smith	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-966-5876	(608)666-5910	(F) 608-656-6820	smit
AJ	Dr. JoAnne Deratto	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-866-5876	(608)666-5880	(F) 608-669-6820	joan
AK	Dr. Adrian Bo...	RX Clinic	1234 Ward Lane	Prairie du Sac	WI	58978-9021	(P) 855-793-9773	Phone 2 (8)	Fax 9	
AL	Dr. Martin Jan	Clinic 10	6020 35th Ave SW	SEATTLE	WA	53583	(P) 855-793-9773	Phone 2 (10)	Fax 10	
AM	Dr. Mary Sm	Clinic 11	Address 11	City 11	State 11	Zip 11	Phone 1 (11)	Phone 2 (11)	Fax 11	
AN	Attending Physi	Clinic 12	Address 12	City 12	State 12	Zip 12	Phone 1 (12)	Phone 2 (12)	Fax 12	
AO	Attending Physi	Clinic 13	Address 13	City 13	State 13	Zip 13	Phone 1 (13)	Phone 2 (13)	Fax 13	
AP	Attending Physi	Clinic 14	Address 14	City 14	State 14	Zip 14	Phone 1 (14)	Phone 2 (14)	Fax 14	
AQ	Attending Physi	Clinic 15	Address 15	City 15	State 15	Zip 15	Phone 1 (15)	Phone 2 (15)	Fax 15	
AR	Attending Physi	Clinic 16	Address 16	City 16	State 16	Zip 16	Phone 1 (16)	Phone 2 (16)	Fax 16	
AS	Attending Physi	Clinic 17	Address 17	City 17	State 17	Zip 17	Phone 1 (17)	Phone 2 (17)	Fax 17	
AT	Attending Physi	Clinic 18	Address 18	City 18	State 18	Zip 18	Phone 1 (18)	Phone 2 (18)	Fax 18	
AU	Attending Physician 19	Clinic 19	Address 19	City 19	State 19	Zip 19	Phone 1 (19)	Phone 2 (19)	Fax 19	
AV	Attending Physician 20	Clinic 20	Address 20	City 20	State 20	Zip 20	Phone 1 (20)	Phone 2 (20)	Fax 20	
AW	Attending Physician 21	Clinic 21	Address 21	City 21	State 21	Zip 21	Phone 1 (21)	Phone 2 (21)	Fax 21	

Sort Rows

There is not a way to automatically sort all rows within a face sheet screen. ECS does have a “Sort” option, however it sorts all words, not each row of words. This means that if a user were

to select all words within a face sheet topic and click Sort, they will now have a jumbled mess to clean up. Do not use the Sort option within any face sheet topics.

To manually sort rows, you will highlight an entire row and move them into the spot within the list that puts them in a particular order (typically alphabetical). You can right click into a white space below where you would like a row to be inserted and select **Insert Row**. This will allow you to move a row up into the spot where you just created a new row. As many rows can be inserted as needed to move things around into a specific sorted order.



AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ
AA	Physicians								
AB	Alternate Physician List								
AC	ATTENDING/PRIMARY PHYSICIAN:	CLINIC:	ADDRESS:	CITY:	STATE:	ZIP:	PRIMARY PHONE:	PHONE 2:	FAX:
AD	Dr. James Black	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5234	(F) 608-555-6
AD	Dr. Jack Cameron	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5244	(F) 608-555-6
AE	Dr. Susan Thomas	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5238	(F) 608-555-6
AF	Dr. Thomas Jones	Eagle Family Clinic	1254 Maple Lane	Sauk City	WI	53583	(P) 608-555-5214	(608)555-5287	(F) 608-555-6
AG	Dr. Hugh O'Connor	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-656-5876	(608)666-5890	(F) 608-656-6
AH	Dr. Samantha Berns	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-566-5876	(608)666-5920	(F) 608-656-6
AI	Dr. Dan Smith	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-966-5876	(608)666-5910	(F) 608-656-6
AJ	Dr. JoAnne Deratto	Riverway Medical Center	687 River Street	Baraboo	WI	53913	(P) 608-866-5876	(608)666-5880	(F) 608-669-6
AK	Dr. Adrian Booker	eRX Clinic	1234 Ward Lane	Prairie du Sac	WI	58978-9021	(P) 855-793-9773	Phone 2 (9)	Fax 9
AL	Dr. Martin January	eRX Clinic 10	6020 35th Ave SW	SEATTLE	WA	53583	(P) 855-793-9773	Phone 2 (10)	Fax 10
AM	Dr. Mary Smith	Clinic 11	Address 11	City 11	State 11	Zip 11	Phone 1 (11)	Phone 2 (11)	Fax 11
AN	ending Physician 12	Clinic 12	Address 12	City 12	State 12	Zip 12	Phone 1 (12)	Phone 2 (12)	Fax 12
AO	ending Physician 13	Clinic 13	Address 13	City 13	State 13	Zip 13	Phone 1 (13)	Phone 2 (13)	Fax 13
AP	ending Physician 14	Clinic 14	Address 14	City 14	State 14	Zip 14	Phone 1 (14)	Phone 2 (14)	Fax 14
AQ	ending Physician 15	Clinic 15	Address 15	City 15	State 15	Zip 15	Phone 1 (15)	Phone 2 (15)	Fax 15
AR	ending Physician 16	Clinic 16	Address 16	City 16	State 16	Zip 16	Phone 1 (16)	Phone 2 (16)	Fax 16
AS	ending Physician 17	Clinic 17	Address 17	City 17	State 17	Zip 17	Phone 1 (17)	Phone 2 (17)	Fax 17
AT	Attending Physician 18	Clinic 18	Address 18	City 18	State 18	Zip 18	Phone 1 (18)	Phone 2 (18)	Fax 18
AU	Attending Physician 19	Clinic 19	Address 19	City 19	State 19	Zip 19	Phone 1 (19)	Phone 2 (19)	Fax 19
AV	Attending Physician 20	Clinic 20	Address 20	City 20	State 20	Zip 20	Phone 1 (20)	Phone 2 (20)	Fax 20
AW	Attending Physician 21	Clinic 21	Address 21	City 21	State 21	Zip 21	Phone 1 (21)	Phone 2 (21)	Fax 21