Tasks for Days!

In this webinar, we dive into all sorts of different task types in ECS. We review how to the build the following task types: View, Trigger, Write, Report, Graph Report, Calendar, Hybrid, Common, and Sort. In addition, with each one we will explore different scenarios in which these task types can save precious time in documentation.

View Tasks

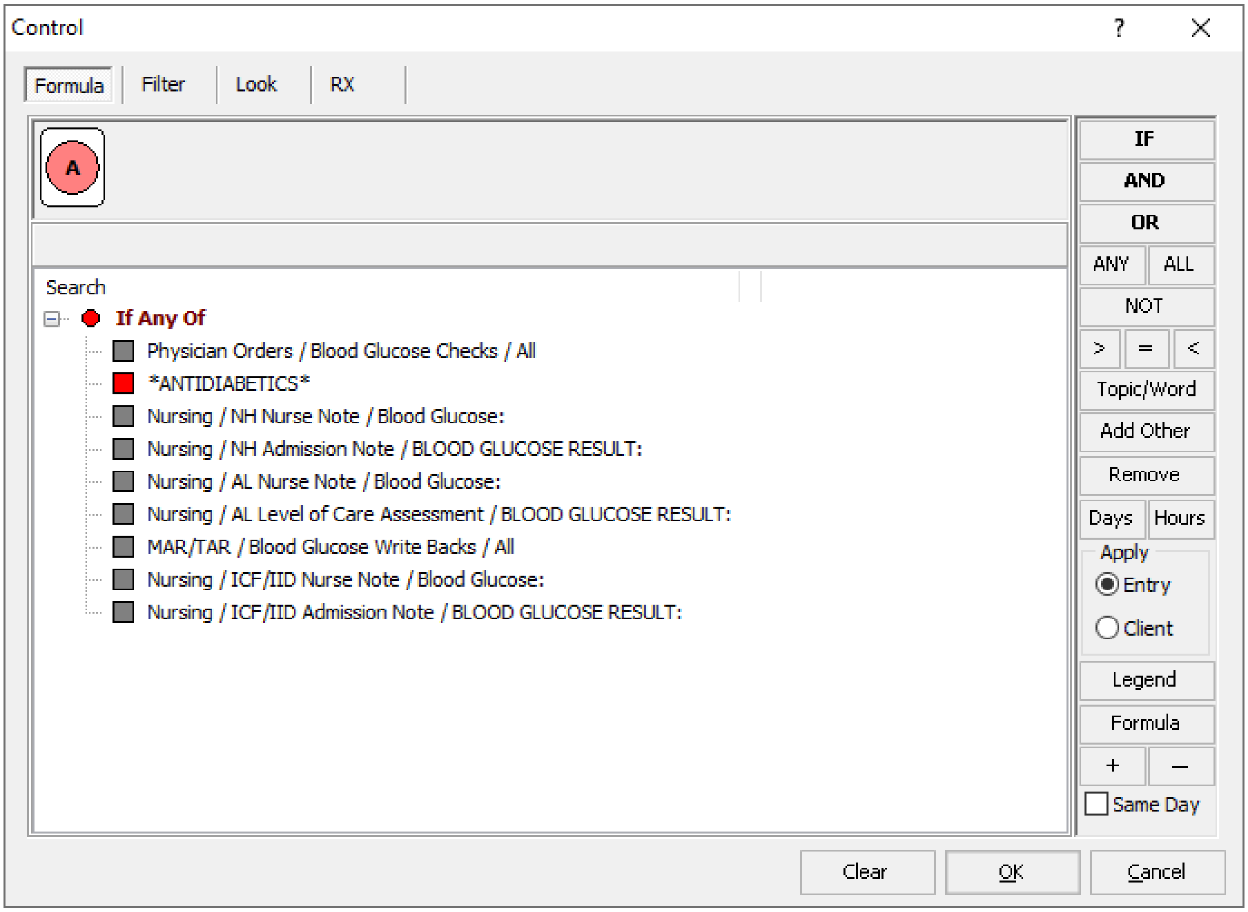
A user may access the **View** icon to look up or search ECS for specific data. A user may decide "on the fly" what they would like to look for within the records. Creating a view task makes it easier for a user to load preset data. For example, if a user needs to run a fall list of every resident who has had a fall in the past 30 days, a view task can be created so that they do not need to run that search manually each month. This will decrease the amount of time a user needs to spend defining the data they want to search for. View tasks can be created for anything that is charted in the record in ECS. This includes entire sections, topics, or specific words within a topic. A user may even search for free texted words, medications, or diagnosis codes.

Each of these items can be pre-defined within a view task. If a user has rights to a view task, they can pull it up and utilize it as they need. View tasks can be attached to an easy access button as well.

1. Click onto **Toolbar.**
2. Click onto the green **View** icon.
3. Make sure that no name(s) are selected (should state "0 Selected). Click **OK**.
4. Once in here, click onto **Tasks**.
5. Click **Save**.
6. Enter in the name of the task and click **OK**.
7. Select Site(s)/Service(s) that should have rights to the task and click **OK**.
8. Select the User Group(s) who should have rights to the task and click **OK**.
9. Once the new task has been created, it will display in the list. Find the new task, highlight it, and click **Edit**.
10. This will open the Clients tab. Click into the **Formula** tab.
11. On the **Formula** tab, construct the formula by using the buttons on the side of the screen. The formula is the equation for the computer. If the computer is to search records for information (or lack thereof), this must be defined. Start by clicking onto **IF** which will be the first node of the formula that is built.
    a. **IF, AND, OR**: These buttons are utilized to begin a statement (node). A formula may contain multiple statements. For example, a formula may state "IF the cat is in the hat OR IF the dog is in the hat." This formula contains two separate statements; either one being true qualifies the event to display.

b. ANY, ALL, NOT, >, =, < : These buttons are used in conjunction with the above and are used to further define a node when needed.
c. Topic/Word: Click onto this to select the Topic and/or Word(s) to be a part of each node.
d. Add Other: Utilize this to add something other than a topic or word. For example, an indication, medication, allergy class, free text, calendar event, or ICD10 code could all be added from this.
e. Remove: Use this to remove a node, or part of a node.
f. Days, Hours: Use Days or Hours to specify a time frame that should be looked at (if needed).
g. Apply To:
    i. Entry: this indicates that all word(s) listed within the node must be written within the same entry. If there are entry breaks, then this may separate some of the words in a topic, causing them not to be within the same entry. Setting a node to "Entry" would not work if you are pulling word(s) from several different topics as they cannot ever appear within the same entry.
    ii. Client: this indicates that all word(s) listed within the node must be written on the same client. It does not matter if they are different topics, entries, etc. as long as they all appear on the same client then the trigger will qualify.

12. On the Filter tab, specify which types of entries should be included. By default, Current Active Entries, Held Entries, Show Start Date, and Isolate Words will all be checked. A user may want to uncheck Use Start Date or Isolate Words if needed.
13. On the Look tab, specify how the data should be displayed once loaded. Some popular options include Line Between Entries, Reverse Chronological Order, Show Name of Initials, and Free Text Highlighter.
14. Typically, nothing on the Common or RX tab would be selected.
15. Click OK to save changes to the task.



View Task Example (Blood Glucose Review)

Trigger Tasks

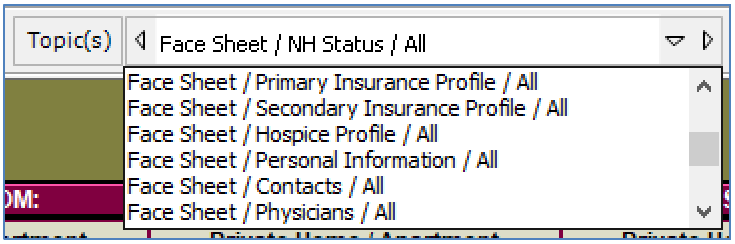
There are two types of trigger tasks. One is manual and the other is automatic. If a trigger task is created with tasks that have "Manual Write" setup in them, then a user will be presented with the trigger screen allowing them to document in any topics that trigger for the selected name. If a trigger task is created with tasks that have "Automatic Write" setup in them, then when a user runs the task, it will run through all triggers, determine which ones need to automatically write, and will document that information in the selected name's record. No intervention is needed by the end user.

1. Utilize the dropdown menu and navigate to **American Data – ECS > Setup > Trigger**.
2. Click into **Tasks.**
3. Click onto **Save.**
4. Enter in the name of the task and click **OK**.
5. Select Site(s)/Service(s) that should have rights to the task and click **OK**.
6. Select the User Group(s) who should have rights to the task and click **OK**.
7. Find the new task in the list, highlight it, and click **Edit.**
8. Click onto **Add** to select triggers that should be a part of this task.
9. Click **OK** to save changes to the trigger task.

Write Tasks

If a user should document within several different topics to complete a required task, such as for Medicare charting, entering a new admission's face sheet information, or completing summary charting; a write task can be created. A write task includes several different topics and therefore allows a user to click through each one. Write tasks can be loaded from the icon or linked to an easy access button.

1. Click onto the **Toolbar.**
2. Click onto the **Write** icon.
3. Make sure that no name(s) are selected (should state "0 Selected). Click **OK**.
4. Click onto **More…** on the left-hand side of the screen.
5. Click onto **Tasks**.
6. Click **Save**.
7. Enter in the name of the task and click **OK**.
8. Select Site(s)/Service(s) that should have rights to the task and click **OK**.
9. Select the User Group(s) who should have rights to the task and click **OK**.
10. Once the new task has been created, it will display in the list. Find the new task, highlight it, and click **Edit**.
11. This will open the Clients tab. Click into the **Topics** tab.
12. Click onto **Add** and select any topic(s) to be included within the write task.
13. Click **OK** to save changes to the task.



Write Task Example (Face Sheet Information), from an end user's perspective

Report Tasks

If a user needs several different report pages to run together, a report task would be how to accomplish that. This is popular for items such as Bed hold Notices, Admission Paperwork, Evacuation Assessment, etc. that require several report pages to be run as one report. Because there is not a way in ECS to build multi-page reports, but rather each page is its own report, pulling them together into a task is how to accomplish the goal of having them run as one report. Report tasks may be accessed via the Reports icon or linked to an easy access button.

1. Click onto the **Toolbar**.
2. Click onto the green **Reports** icon.
3. Make sure that no name(s) are selected (should state "0 Selected). Click **OK**.
4. Click **Tasks.**
5. Click **Save**.

6. Enter in the name of the task and click **OK**.
7. Select Site(s)/Service(s) that should have rights to the task and click **OK**.
8. Select the User Group(s) who should have rights to the task and click **OK**.
9. Once the new task has been created, it will display in the list. Find the new task, highlight it, and click **Edit**.
10. This will open the **Reports** tab. Click **Add** to select all necessary reports into the task. **Note:** the reports will run in the order they are listed in this box.
11. If wanting to add **Sign Tasks** as well (popular with Hospital Transfer Packets), click into the **Sign Task** tab and add in any necessary reports. Only Sign Task reports can be included in a report task.
12. Utilize the **Dates** tab if a date range is required for the task.
13. Click **OK** to save changes to the task.

Graph Report Tasks

If a user needs several different graph pages to run together, a graph report task would be how to accomplish that. This may be popular for Quality Assurance graphs all related to the same topic (e.g., pain, behaviors, infections, etc.). Because there is not a way in ECS to build multi-page graph reports, but rather each page is its own, pulling them together into a task is how to accomplish the goal of having them run as one graph report. Graph report tasks may be accessed via the Graphs icon or linked to an easy access button.

1. Click onto the **Toolbar**.
2. Click onto the **Graphs** icon.
3. Make sure that no name(s) are selected (should state "0 Selected). Click **OK**.
4. Click **Tasks.**
5. Click **Save**.
6. Enter in the name of the task and click **OK**.
7. Select Site(s)/Service(s) that should have rights to the task and click **OK**.
8. Select the User Group(s) who should have rights to the task and click **OK**.
9. Once the new task has been created, it will display in the list. Find the new task, highlight it, and click **Edit**.
10. This will open the **Reports** tab. Click **Add** to select all necessary graph reports into the task. **Note:** the graphs will run in the order they are listed in this box.
11. Utilize the **Dates** tab if a date range is required for the task.
12. Click **OK** to save changes to the task.

Calendar Tasks

A user may access the Calendar icon to look up or search ECS for specific data that pulls directly to the calendar. A user may decide "on the fly" what they would like to look for within the records. Creating a calendar task makes it easier for a user to load preset data. For example, if a user needs to see which residents have fallen this month, a calendar task can be created so that they do not need to run that search manually each month. This will decrease the amount of time a user needs to spend defining the data they want to search for.

Calendar tasks can be created for any word that s setup as a calendar word. Almost all words within the AR module are setup as calendar words. Some in the clinical module are setup this way as well (e.g., incident, fall, activity attendance). Calendar tasks can be run via the calendar icon or attached to an easy access button. The reason that a word may setup to populate based on the calendar is in situations where entries may be backdated. By setting a word to look at the calendar > date IN entry, we can pull entries based on the date within the entry rather than the date OF the entry (date it was documented). This means that if a resident fell on 1/31/2021, but the nurse does not chart it until 2/1//2021, it will properly be reflected in QA graphing because it will look at the date IN the entry, not date the entry was made. This causes for much more accurate reporting.

1. Click onto the Toolbar.
2. Click onto the Calendar icon.
3. Make sure that no name(s) are selected (should state "0 Selected). Click OK.
4. Click Tasks.
5. Click Save.
6. Enter in the name of the task and click OK.
7. Select Site(s)/Service(s) that should have rights to the task and click OK.
8. Select the User Group(s) who should have rights to the task and click OK.
9. Once the new task has been created, it will display in the list. Find the new task, highlight it, and click Edit.
10. Click onto More… to access the necessary screen needed to setup the task.
11. Click onto Add and navigate to the section/topic/word(s) to be added into the task.
12. Once words are added, utilize the checkboxes to determine how the data should display. Some common settings to be aware of:
    a. Show Names Without Data: When this is checked, all selected name(s) appear on the report, even when they have no qualifying data causing them to populate it.
    b. Show Method:
        i. Show Occurrences: Selecting this causes the number of occurrences to display. For example, if an entry (such as fall) was charted three times in one day, then a three will appear in that cell. This is the most utilized option.
        ii. Show Values: Selecting this option allows for a user to define the values that will populate. This may be used if wanting a dollar amount underneath the words to pull to the calendar, rather than whether the event occurred. A user must then specify the value(s) to populate by highlighting each word and clicking the Value(s) button.
    c. Site/Service Totals: Select this checkbox if you would like the totals to be divided out by site and service.

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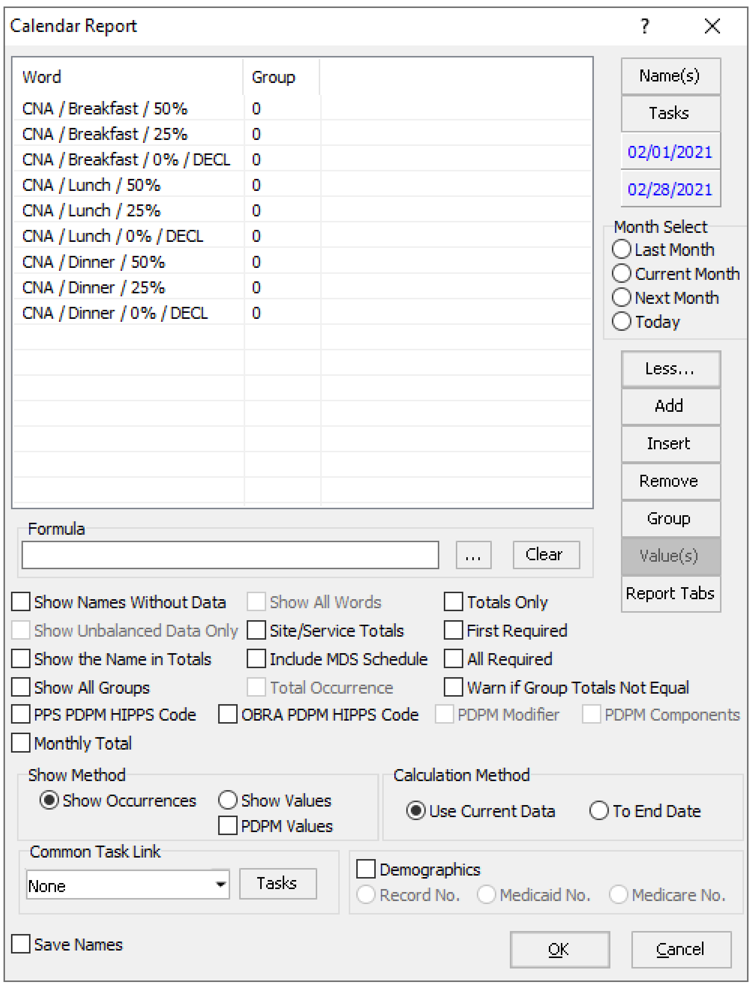
d. **Totals Only:** When this is checked, no name(s) will populate into the report, rather only the totals.
e. **First Required:** For a name to populate to the calendar report, he or she needs the first word in the list to occur during the time selected.
f. **All Required:** For a name to populate to the calendar report, he or she needs all words in the list to occur during the time selected.
g. **Demographics:** You may choose to display demographic information on the calendar report in addition to the name. The demographic column will appear to the right of the Name column on the display.
h. **Month Select:** Select what option, by default, should display when the report is run. Once the report is loaded, a user has the capability to adjust these dates.

13. Once everything is selected, click **OK** to save the task.



Calendar Task Example (Risk Review – Food Intake <75%)

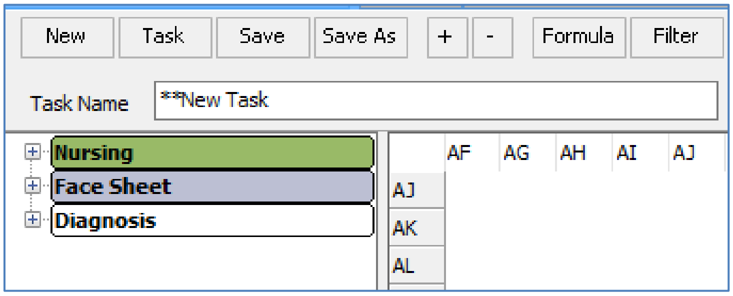
Hybrid Tasks

A hybrid task allows several different words/topics to be brought together in what appears to be one seamless charting screen. These are used at some facilities for summary or Medicare charting. A hybrid task can populate words from all different topics within ECS onto one screen. When the user documents in this type of task, to them it appears as one "topic" as they continue to scroll through the screen. However, when the user clicks Save, it sends that charting to each of the different topics that the words originate from.

Although a hybrid tasks helps a user with documenting the initial entry, it becomes a bit more difficult if a user were to edit that note. That is because when a user clicks onto an entry that was originated from a hybrid task and they decide to do a "Discontinue and Copy," the note will be copied back into the topic it originates from, not back into the hybrid task. This sometimes confuses an end user as they are unsure why the screen appears differently than it had before.

Hybrid tasks can be launched via the Write icon or can be linked to an easy access button.

1. Utilize the dropdown menu and navigate to American Data – ECS > Setup > Hybrid Task.
2. Click onto Save As.
3. Enter in the name of the task and click OK.
4. Select Site(s)/Service(s) that should have rights to the task and click OK.
5. Select the User Group(s) who should have rights to the task and click OK.
6. The task will now be loaded into your current screen where you may begin to build the task. A hybrid task can only populate words that already exist somewhere. You cannot create new words IN a hybrid task itself.
7. To add words into the screen, right click into a white space and select Word(s). Navigate to the section/topic/word(s) to be brought into the task. Highlight all word(s) to be brought into the task and click OK. When words are added, they will always be added in the column you clicked Word(s) in, which means they will have to be moved around as they will stack within just one column.
8. Highlight word(s) to be moved, right click, and select Move. Left click to drop the word(s) into the new location.
9. Add words from as many different topics as needed. This type of task can also be utilized to give a user only rights to specific words within a topic. For example, if a certain user group needs to be able to enter in some data from an assessment, but you do not want them to see the entire topic, a hybrid task can be used to pair down what the user group sees. Just keep in mind that if they are to edit an entry, it will load the entire topic (not the paired down version via the hybrid task).



10. On the left-hand side of the hybrid task setup, note that all topic(s) which have words populated into the hybrid task will be listed. They can be maximized to see the specific topic as well as specific word(s) that have been included in the task setup.
11. Once all words have been added into the task, click onto **Save** to update your task with the new additions.

Common Tasks

A common task can be used to find name(s) that share something in common. It may be that they have the same payer source, the same physician, or are on one of the same medications. A common task can be linked almost anywhere in ECS (write task, view task, sign task, to a user group upon logging into ECS, a report, a graph, etc.) A common task may also be run within the ID screen if a user just needs a quick list of everyone who has something in common.

1. Click onto the **Toolbar**.
2. Click onto the **ID** icon.
3. Click onto the **Common** button.
4. Click **Tasks**.
5. Click **Save**.
6. Enter in the name of the task. Click **OK**.
7. Select Site(s)/Service(s) that should have rights to the task and click **OK**.
8. Select the User Group(s) who should have rights to the task and click **OK**.
9. Once the new task has been created, it will display in the list. Find the new task, highlight it, and click **Edit**.
10. On the **Formula** tab, construct the formula by using the buttons on the side of the screen. The formula is the equation for the computer. If the computer is to search records for information (or lack thereof), this must be defined. Start by clicking onto **IF** which will be the first node of the formula that is built.
11. On the **Filter** tab, specify which types of entries should be included as well as the date range to be searched. By default, **Current Active Entries** will be checked. A user may need to uncheck this option to instead switch it to **Search Calendar.**
12. Click **OK** to save changes to the task.

Sort Tasks

A sort task can be used to sort name(s) in a specific order. By default, the name list always shows in alphabetical order, however there may instances that a user wants to see residents in birth date order, table number order, or room order number. A sort task can be linked to a report or can be run manually in the ID screen. The Sign icon (used for MAR/TAR) already has a predefined sort option built in to sort all names based on room number, if the facility prefers. A separate sort task does not need to be linked to the Sign icon to sort in this manner. Attaching a sort task to a Birthday List report may be helpful so that the residents sort in month order. Or attaching a sort task to a Tray Card report may be useful so that the names sort in order of the table number charted on them.

1. Click onto the **Toolbar**.
2. Click onto the **ID** icon.
3. Click onto the **Sort** button.
4. Select the **Sort Type** (What Comes After Word, Order of Words Selected, or Demographics).
5. Select **Sort Options** (if applicable). These will only be available with What Comes After Word.
6. Select **Tasks Due/Start Date/End Date/Use Calendar** (if applicable) to specify the date range the sort task should look within. This is not required however if you do not need it to be date specific.
7. Select **Demographic** option (if applicable). **Options available are:** BirthDate (by Age), BirthDate (by Month), Record Number, Client Number, and Other No.
8. Once all options have been selected, click onto **Tasks**.
9. Click **Save**.
10. Enter in the name of the task. Click **OK**.
13. Select Site(s)/Service(s) that should have rights to the task and click **OK**.
14. Select the User Group(s) who should have rights to the task and click **OK**.

Note: Sort tasks cannot be edited at this time. If you have made a mistake, a new sort task will need to be created.