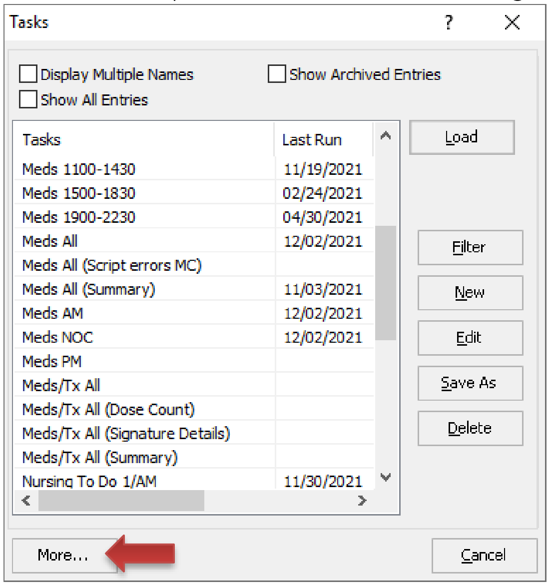
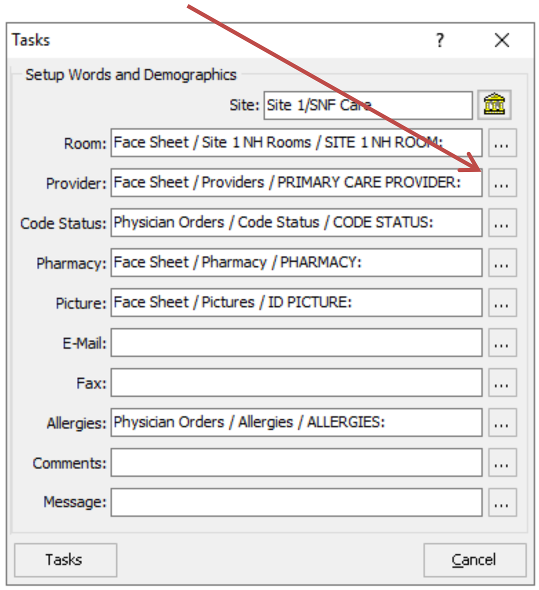
Electronic Sign – System Supervisor

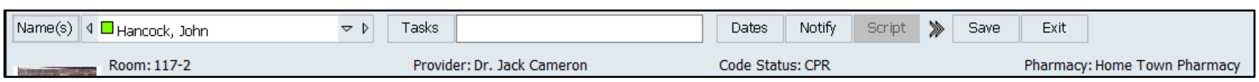
General Task Setup

Click **More…** at the bottom of the *Tasks* selection screen to view a listing of *Setup Words and Demographics*. The information is pulled from documentation throughout ECS and will appear in the header area at the top of the Sign screen.

Choose from the picklist … to link a demographic or button word.







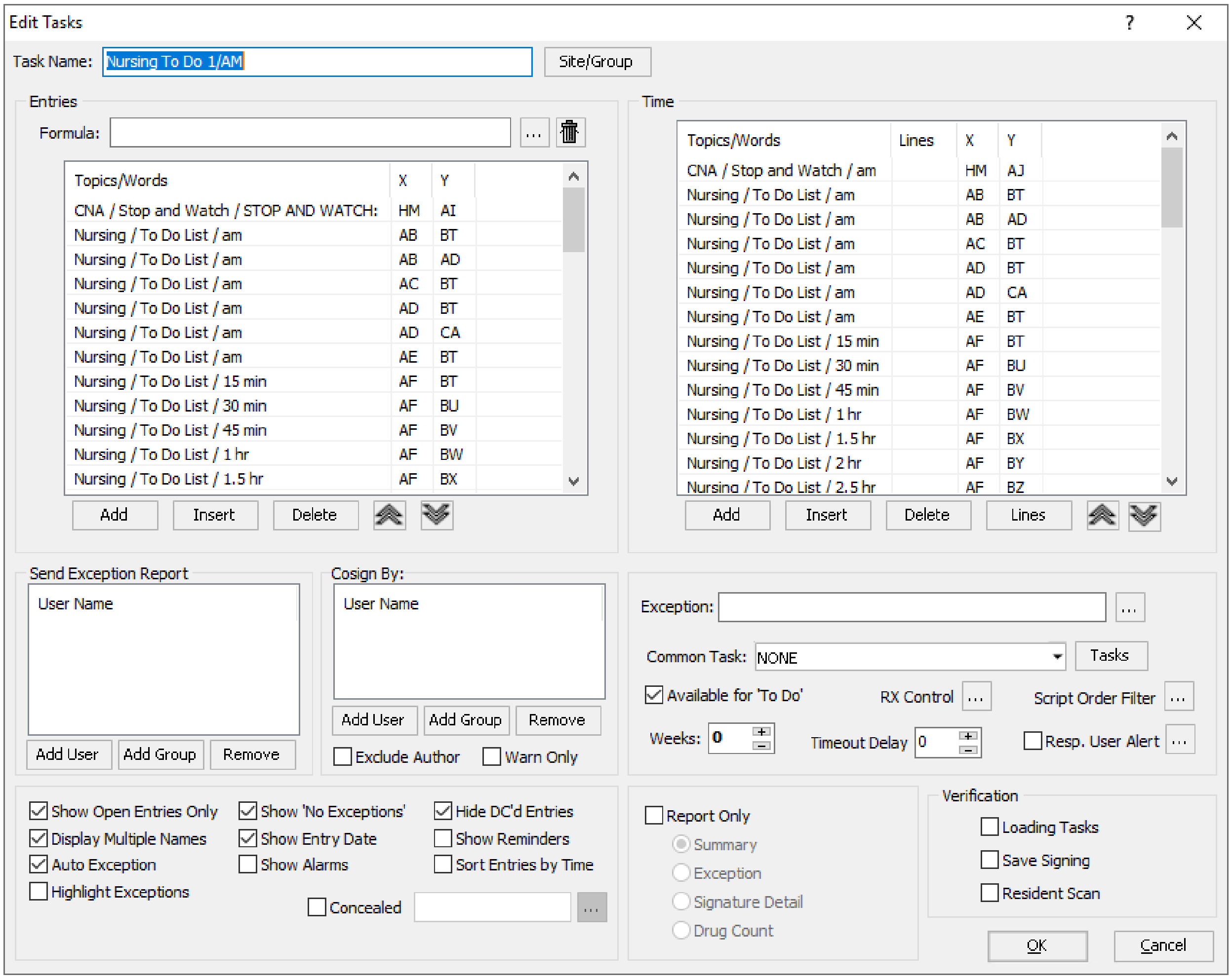
Electronic Sign Task Setup & Editing

Electronic Sign tasks are created for MARs, TARs, To Do lists, and other flow sheets. All the tasks follow the same setup rules.

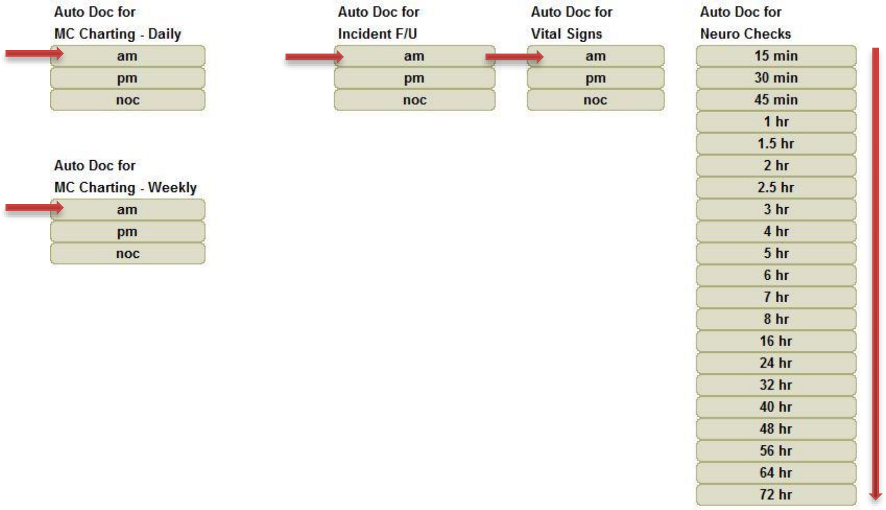
The Electronic Sign screen is comprised of two columns. The *Entries* column defines which orders pull to the task. The *Time* column defines the cells that appear for user signature or other information. Additional words that should be signed off also appear in the *Time* column (*i.e.,* AM Site for a medication that is given by injection). As a rule of thumb, information must first appear in the *Entries* column before the signature is defined in the *Time* column. More complex sign tasks for MARs/TARs are typically set up to use *Conditional Formulas* allowing for greater control to define which entries pull to the task. In this case, the *Entries* column will be blank. However, a simpler sign task, such as a To Do List, may not use a Conditional Formula.

Create a New Task

*Option 1: NOT Using Conditional Formulas

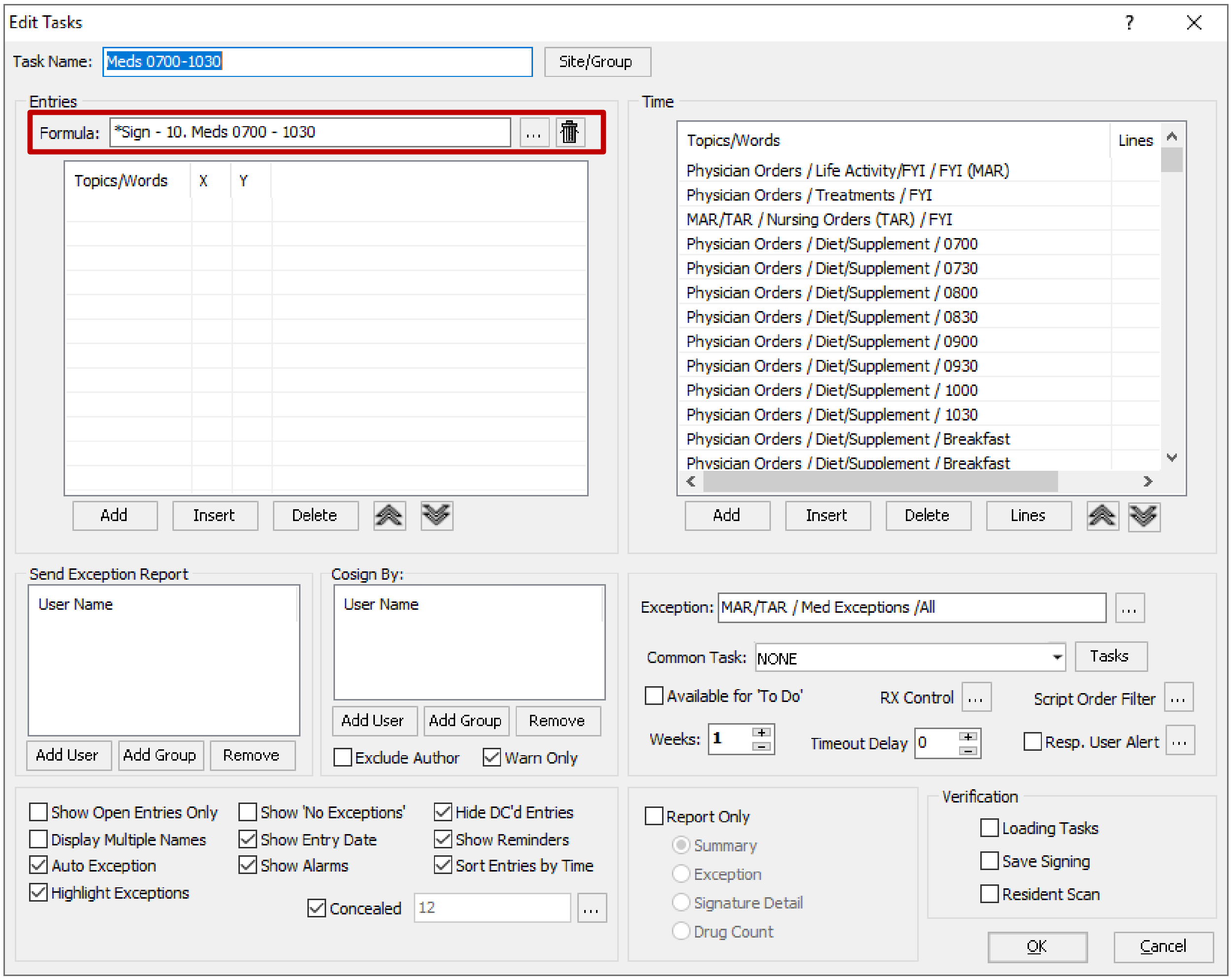


1. Click the **Sign** icon.
2. Click **Task.**
3. Click **New.**
4. Type in the Name for the task.
5. Click **Add** under the *Time* column.
6. If creating a To Do List task, select the *Nurse Charting* tab.
7. Double-click the *To Do List* topic to open the screen.
8. Select all the 'shift/time' words that pertain to the specific task you are making (AM or PM or All Shifts) and click **OK**. (If using the Nursing To Do List example for the AM shift, you will need to capture all the 'AM' words, as well as all others that would apply to any shift, such as neuro check times or 'init' words. You may have to scroll down in the screen to find some of these options.)

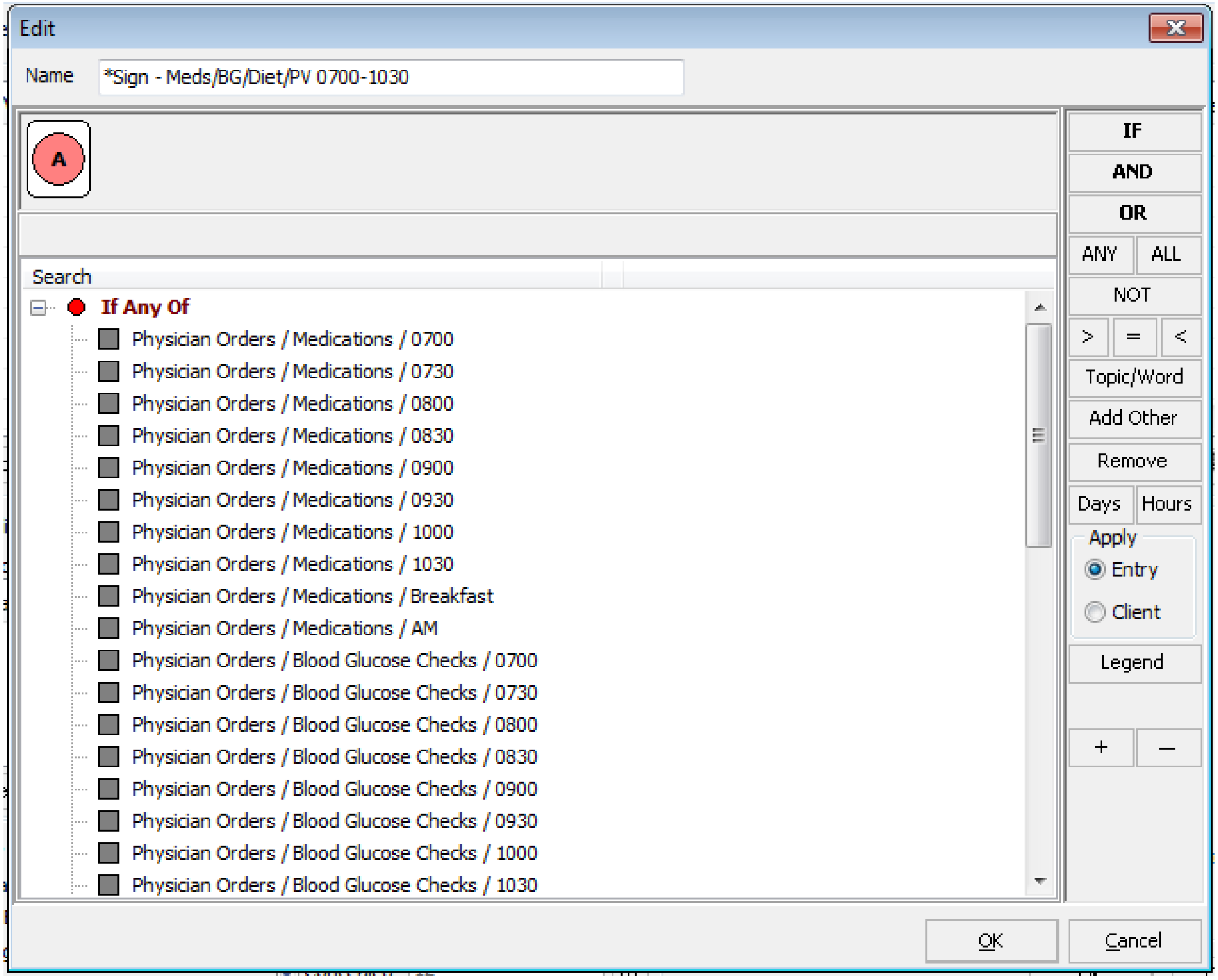


9. Holding **Ctrl** on the keyboard, highlight all the <u>time</u> or <u>shift</u> words (NOT additional words such as BP or Weight) just added in the *Time* column. Right-click any of the highlighted words and select **Copy**.
10. Right-click the *Entries* column and select **Paste.** Selected lines from the *Time* side will appear in the *Entries* side.
11. Repeat steps 5-10 until all desired words have been added to the task.
12. To link the *Charting Exception* topic, click the picklist box next to *Exception* and select the desired topic, and then click **OK**. (For the To Do List example, there is no need for an Exceptions topic.)
13. Click **OK** once you are done selecting the components of the task. Next, you will need to select the Site/Services that will have rights to the task, and then click **OK**. You will also need to select the User Group(s) that will have rights to the task, and then click **OK**.
14. Click **Load** to load your new task and then select a name to ensure it is pulling the desired entries. Or, click **Cancel** to close out of the *Task* selection screen.

*Option 2: Using Conditional Formulas



1. Follow steps 1-4 above to create and name the task.
2. Click the picklist box next to *Formula* above the *Entries* column. A formula screen will appear.
3. Create the conditional formula to define which entries pull to the Sign task (example below is for a medication sign task):
    a. Click **New** and type the name of the formula at the top of the of the *Edit* screen (*Hint: when creating several conditional formulas, name them similarly so they appear together in the formula list. For example, formulas that affect the Sign tasks might be named *Sign – Meds 0700-1030*, *Sign – Meds 1100-1430*, etc.)
    b. Click the buttons on the right of the screen to create the formula: If, Any. The phrase *If Any Of* will appear in the Search window on the left.
    c. Click **Topic/Word** on the right and then click **Physician Orders**. Double-click the desired topic to open it (*i.e.,* medications), and highlight the desired time words to pull to that formula, and then click **OK**.



   d. If more time words are required for the formula, repeat step 3c above. Once all words have been added, click **OK** to save the formula.
   e. To link it to the Sign task, highlight the new formula in the list and click **OK**.

4. Follow steps 5-8 in Option 1 above to add words to the *Time* side of the task.
5. To link the *Medication Exception* topic, click the picklist box next to *Exception* and select the *Nurse Charting* (or *MAR/TAR*) tab. Then, highlight the *Med Exceptions* topic and click **OK**.
6. Click **OK** once you are done selecting the components of the task. Next, you will need to select the Site/Services that will have rights to the task, and then click **OK**. You will also need to select the User Group(s) that will have rights to the task, and then click **OK**.
7. Click **Load** to load your new task and then select a name to ensure it is pulling the desired entries. Or, click **Cancel** to close out of the Task selection screen.

Additional Fields on the Task Setup Screen

- **Task Name** – Displays the name of the sign task
- **Site/Group** – Used to assign specific Sites(s) and/or Group(s) to a specific task. Only the Sites(s) or Group(s) that have been designated will be able to view the task.

- Entries Column - Defines what appears on the Electronic Sign. Use Add to add topics/words. Use Insert to insert topics/words into a specific order. The information is inserted *above* the highlighted line. Use Delete to remove a highlighted link.
  NOTE: **The *Entries* column will be blank if a *Formula* is used.
- Time Column - Defines the cells requiring signature or other information to be entered on the sign task. Use Add, Insert, and Delete as described above. Use Lines to designate more than one line for a cell, if desired.
- Use Conditional Formula (Optional) - Displays the formula that defines which entries pull to the sign task.
  NOTE: **Will be blank if the *Entries* column is used.
- Send Exception Report – Each time an Exception Report is generated from this task, the User(s) and/or Group(s) listed will receive the report via Internal Communication.
- Co-Signature Required By - The User(s) and/or Group(s) listed are required to either have entered in the order or to have co-signed the order before the order can be signed off on for this task. Only one user from those listed is required to co-sign. When an order is entered by a user whose name or group is NOT in this list, the order appears on the Sign task with a watermark signifying that a co-signature is required.
  - Exclude Author – Used with 'Co-Signature Required By' to require a co-signature on entries written by a user who is in one of the co-signature groups listed.
  - Warn Only – This only prompts the user with a warning that the order requires a co-signature, but it will still allow the user to sign it out. If the user does sign out the medication, they will be flipped to the *Med Exceptions* screen and "Medication administered prior to cosign" will automatically document.
- Exception - When users sign a cell with *Hold, Refuse,* or *Sign Out*, they are taken to this link to document the exception.
- Common Task – May be used to filter the client list before the task is loaded.
- Available for "To Do" - Makes the task available within the *To Do List* icon.
- Report Only – Loads the task as a Report only (Summary, Exception, or Signature Details).
- Verification - Loading Tasks – Requires a fingerprint or other verification (*i.e.,* magnetic card reader) from the user to load the task. Save Signing – Requires a fingerprint or other verification from the user to save the information. Resident Scan – Used for wristband scanning to verify the correct resident.
- Show Open Entries Only - Hides orders that are *not* due to be signed off today.
- Display Multiple Names – Displays entries for multiple clients on one continuous screen when the task is loaded.
- Auto-Exception - Automatically generates an Exception Report when the user closes out of the task.
- Highlight Exceptions – Highlights cells *not* signed off when moving from one client to the next or when exiting the electronic sign task.

- Show 'No Exceptions' - Any Exception Report that is run for this task will show the names of all selected clients and whether or not they have exceptions.
- Show Entry Date - Displays the date of the entry on the electronic sign.
- Show Alarms – When a word is set up to alarm in the electronic sign, checking this option will allow the alarm to pop up when the task is loaded for the client. (See Word Properties for further explanation).
- Hide DC'd Entries - Removes discontinued entries from the electronic sign display.
- Show Reminders – Any word set up to show a reminder, if part of an order in this task, will pop up the reminder when the task is loaded. (See Word Properties for further explanation).
- Sort Entries by Time – Sorts entries from soonest to latest time due.
- Concealed – Allows the designation of which concealed level(s) to display on the electronic sign. (*i.e.,* to display concealed Side Effects).
- Timeout Delay – Designates the number of seconds of inactivity until ECS 'Hides,' requiring the user(s) to log back in to continue working on the same screen.
- Weeks - Designates the number of weeks for the look-back period on the electronic sign. When Weeks is set to zero, the electronic sign displays today only.
- RX Control – Used with the formulary *Physician Order* tab to show side effects and/or indications for each medication. This can be set to varying levels of severity.
  NOTE: **Concealed must be checked in the task setup for side effects to show on the task.
- HL7 Order Filter/Script Filter – Designates which types of Script orders will display for the task. This is only necessary if the facility is using Script to communicate with their pharmacy.
- OK - Closes the screen and saves any changes.
- Cancel – Closes the screen without saving changes.

Edit Sign Tasks

Sign tasks may be edited by selecting different options listed above.
When a new time word is added to a screen, it will need to be added to every sign task where that order should appear. For example, if a facility adds 'resident-centered' times to a treatment screen (*i.e.,* before breakfast, midmorning, etc.), these words will need to be inserted into each appropriate sign task for the order to pull when the task is loaded. 'Morning' words will be added to the *TAR(AM)* task, 'afternoon/evening' words to the *TAR(PM)* task, 'night' words to the *TAR(NOC)* task, and 'all shift' words to the *TAR(All)* task.

Insert New Words into a Task

1. Click the Sign icon.
2. Click the Tasks button.
3. Select the Task(s) desired and click Edit.
4. Determine where in the task order the new words should appear. For example, new 'hour' words in the *Treatment* topic should be inserted into the task setup either before

or after the existing treatment hour words. Highlight the line below where the new words are to be added.

5. Click **Insert** under the *Time* column.
6. Select **Physician Orders**.
7. Double-click the desired topic containing the new word(s).
8. Select all the new 'time' and/or instruction words pertinent to this task, and then click **OK**.
9. Add any new 'hour' words from the *Time* column to the Conditional Formula setups for this task by clicking the picklist box next to *Use Conditional Formula*, and then clicking **Edit**. (**If NOT using Conditional Formulas, copy and paste the new words to the *Entries* column - see option #1 above under *Create a New Task*).
    - **Only hour words (NOT the instruction words like AM BP:) will be added to the Conditional Formula or the *Entries* column.
10. Click **OK** when finished to save changes.

Troubleshoot Sign Tasks

Order is Missing from the Task

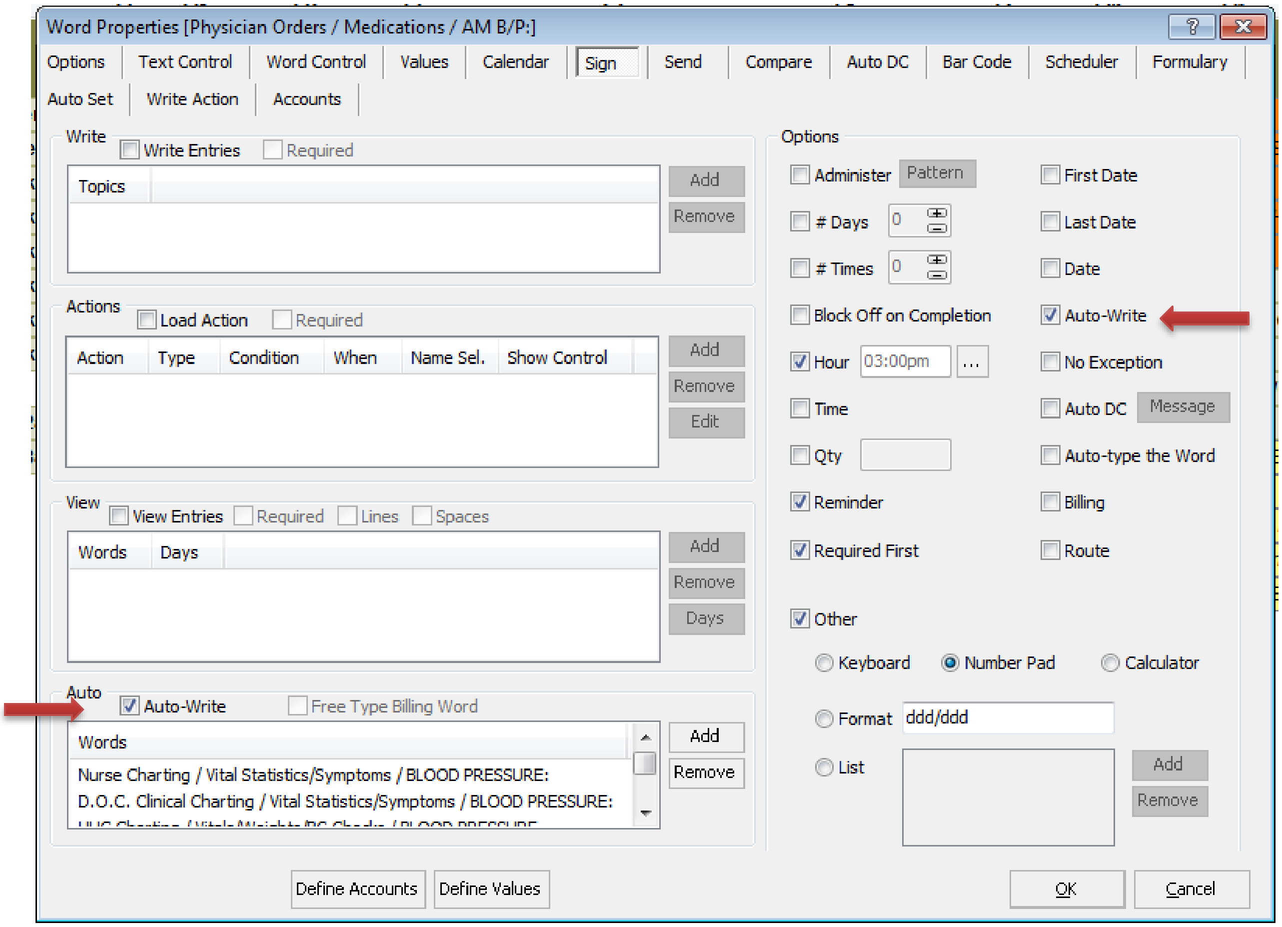
1. Check the order entry to verify there is an 'hour' or 'shift' word in the order.
2. Confirm the 'hour' or 'shift' word is selected from the words in the Topic and *not* free text.
3. Check the Sign task setup to ensure the 'hour' or 'shift' word is in the *Entries* column (or in the Conditional Formula). The same word should be in the *Time* column.

Cells Missing to Sign Off Extra Information

1. Check the order entry to verify the desired information word is in the order.
2. Confirm the 'hour' or 'shift' word is selected from the words in the topic and *not* free-texted.
3. Check the Task setup to ensure the word is in the task setup in the *Time* column.

Electronic Sign Write-backs are Missing

1. Go into word setup and locate the word within the order that should be writing back into the record. (*i.e.,* AM Weight, PM Pulse).
2. Click the **Sign** tab. This is where all the auto-documentation information should be setup. Verify 'Auto-Write' is checked on the right-hand side, as well as underneath the *Auto* portion of the screen. (There should be word(s) listed underneath the *Auto* portion which indicates where the word should write back to once it is initialed on the sign task).



Word Properties [Physician Orders / Medications / AM B/P:]
Options
Text Control
Word Control
Values
Calendar
Sign
Send
Compare
Auto DC
Bar Code
Scheduler
Formulary
Auto Set
Write Action
Accounts
Write
Write Entries
Required
Topics
Add
Remove
Actions
Load Action
Required
Action
Type
Condition
When
Name Sel.
Show Control
Add
Remove
Edit
View
View Entries
Required
Lines
Spaces
Words
Days
Add
Remove
Days
Auto
Auto-Write
Free Type Billing Word
Words
Nurse Charting / Vital Statistics/Symptoms / BLOOD PRESSURE:
D.O.C. Clinical Charting / Vital Statistics/Symptoms / BLOOD PRESSURE:
Add
Remove
Options
Administer
Pattern
Days
0
Times
0
Block Off on Completion
Hour
03:00pm
Time
Qty
Reminder
Required First
Other
First Date
Last Date
Date
Auto-Write
No Exception
Auto DC
Message
Auto-type the Word
Billing
Route
Keyboard
Number Pad
Calculator
Format
ddd/ddd
List
Add
Remove
Define Accounts
Define Values
OK
Cancel