Demographics & Face Sheets

ADT/ Face Sheet	Demographic	Face Sheet	Diagnoses	Census	Documents	Other
Marketing Menu	Add/ Update Client	Admission	Add Diagnoses	Daily Census	Admission Agreement (e-sign)	Write Internal Memo
Department Menu		Re-Admission	View/ Edit Diagnoses	Statistics Calendar	Scan Documents	Schedule
		Discharge/ Transfer/ LOA	Diagnosis List (history)	Room/ Bed List	View Scanned/ Signed Documents	
		Room Change	Diagnosis List (archived)	Admission/ Discharge		
		View/ Edit Face Sheet	View Invalid Diagnoses			
		Face Sheet Report	Diagnoses Report			

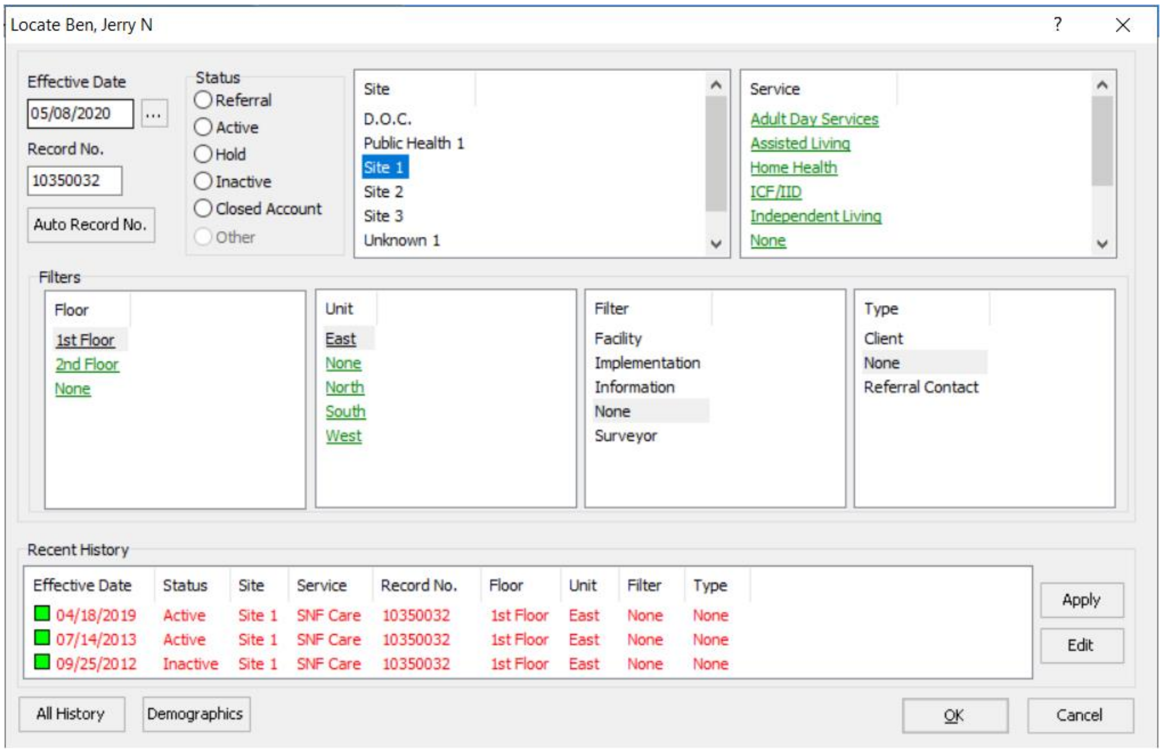
Demographics/Locate

Enter a New Client

1. From the ADT/Face Sheet Access screen, click Add/Update Client.
2. Select New.
3. The Name Type window will appear with selections for Client, Vendor, and Provider. Select Client and click OK.
4. Enter in the client's demographic information.
   a. First Name, Last Name, and Birthday are all required fields to create a new client record. If you are entering in a client as a referral and are unsure of any of this data, enter in any data as it can be updated later once it is known.
   b. Note that the Client Number is only used as a secondary tracking tool (to Record Number) if a facility so chooses. The Record Number will be added in this next step.
   c. If the resident already has an existing record in the database, enter the Social Security Number and click Check SSN. The matching record will be found and may be selected. A client should only exist within the database one time, which means Check SSN should be utilized to ensure the client does not already exist, potentially within a different status, site, or service.

d. Select the **Do Not Disclose** checkbox if the resident prefers his/her admission to not be disclosed to others.

5. Click **OK** to save. The Locate screen appears next.
6. Complete this screen to indicate the client's status and location within the facility. This status area only affects the client list, not the occupancy status (entered within the Face Sheet).
7. Select the picklist box to the right of **Effective Date** to select the appropriate date (if not today). This is typically the admission date.



8. In Status, select **Active** (or **Referral** if entering the client as a potential).
   a. **Referral** – used for a potential client.
   b. **Active** – used for a client who is currently located within your facility.
   c. **Hold** – used for a client who is on a hospital bed hold or leave of absence.
   d. **Inactive** – used once a client has discharged from the facility.
   e. **Closed Account** – used by billing staff once an inactive client has a $0 balance on their account.
9. If multiple sites are listed, select the applicable **Site**.
10. If multiple services are listed, select the applicable **Service**.
11. Select appropriate **Filters** (Floor, Unit, Wing, Filter, Type, etc.)
    a. Filters listed in green are required to create the record. Filters in black are optional.
12. Enter the **Record Number** (required) or click **Auto Record No**.
13. Click **OK** to save the new client into the system.

14. Click **Close** to return to the ADT/Face Sheet Access screen.

Update an Existing Client's Demographic Information

1. From the ADT/Face Sheet Access screen, click **Add/Update Client**.
2. Right-click the client's name and select **Demographics**.
3. Enter the updated demographic information. All information can be edited *except* the Client field (this is an auto-populated number which increments based on each new client added into ECS; it is only utilized by AD support staff).
4. Click **OK** to save and **Close** to return to the ADT/Face Sheet Access screen.

Changing a Client's Status or Filter

(*i.e.*, Active to Inactive, East Wing to West Wing, or Change Record Number)

1. From the ADT/Face Sheet Access screen, click **Add/Update Client**.
2. Right-click the client's name and select **Locate**.
3. Select the picklist box next to **Effective Date** and select the date of the change (if different from today).
4. The client's current locate settings will be highlighted. Only select the date, status, and the item(s) that have changed (if any).
5. If you need to record an additional Status/Filter change, click **Apply** to save the first one, and then continue with the next change.
6. Click **OK** to save and **Close** to return to the ADT/Face Sheet Access screen.

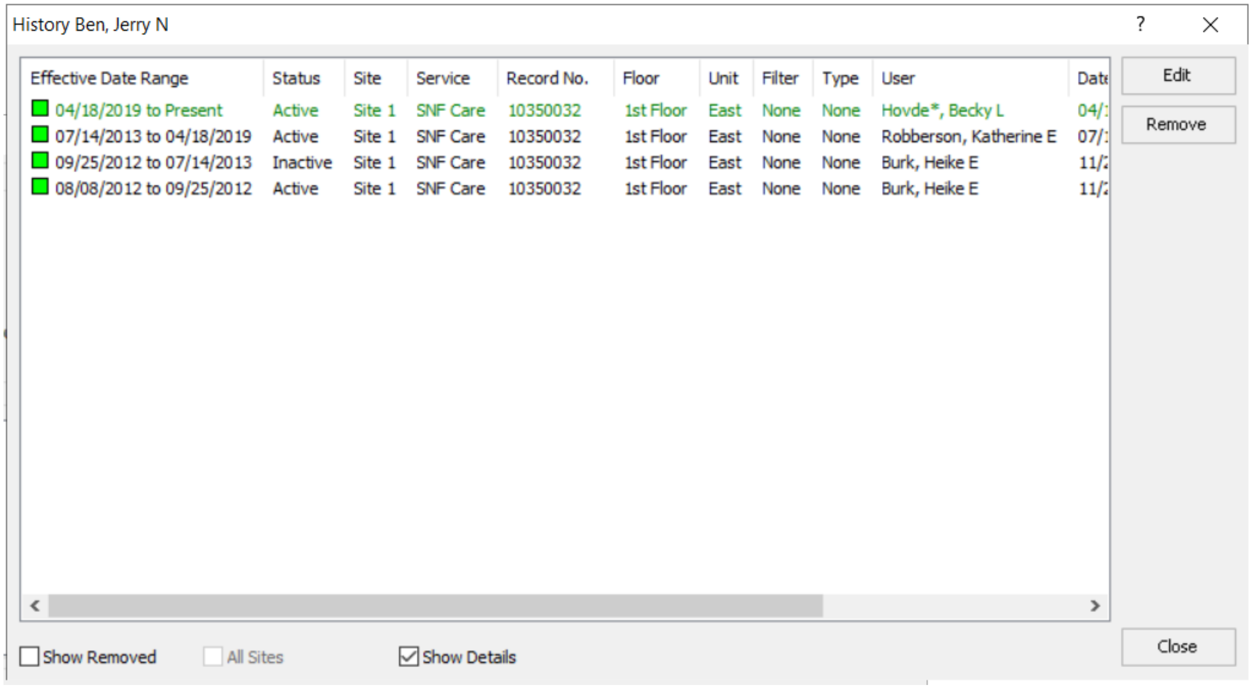
Moving a Client from One Service to Another

1. From the ADT/Face Sheet Access screen, click **Add/Update Client**.
2. Right-click the client's name and select **Locate**.
3. Select the picklist box next to **Effective Date** and select the date of the change (if different from today).
4. Select the status of **Inactive**, **Hold**, or **Closed Account**.
    a. When services do not "co-exist", the client must be marked as Inactive, Hold, or Closed Account in one service before they can be marked as Active in the new service. A client can only be active in <u>one service</u> at a time. For example, if a client is temporarily living in the nursing home, but they have an assisted living apartment; they will be listed as Inactive in assisted living and Active in the nursing home. Billing will still occur for client's listed in the Inactive statuses.
    b. When services do not "co-exist", and you wish to pre-admit a client into a new service before they are discharged from the old one, you may put the client in the new service under a Referral or Hold status (without altering the Active status of the original service.
5. Click **Apply** to save the status change.
6. Enter the information for the new service. Select the **Effective Date**, a status of **Active**, the appropriate **Site/Service**, and any other required **Filters**.
7. Click **OK** to save and **Close** to return to the ADT/Face Sheet Access screen.

Editing an Existing Client's Locate Information

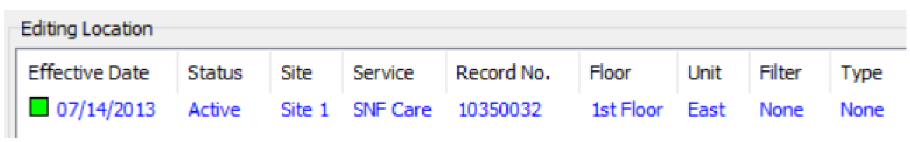
(*i.e.*, a locate status was entered in error or with the incorrect effective date)

1. From the ADT/Face Sheet Access screen, click Add/Update Client.
2. Right-click the client's name and select Locate.
3. To see the client's full history, click the All History button.



   a. To indicate you are in editing mode, *Editing Location* appears above the line you are editing.

4. If you select the option for Edit, start by selecting the appropriate Effective Date of when the change should occur.



5. Select all required fields: Effective Date, Status, Site, Service, and any required Filters.
   a. The client's current Locate settings will be highlighted. You only need to select the item(s) which have changed.
   b. If you make an invalid selection, you will be alerted via a pop-up message when clicking OK.
6. Click OK to save and Close to exit out of the All History screen.
7. Click Cancel to return to the ID/Demographics screen (as your change has already been saved, you do *not* click OK or you will receive a warning message).

ID/Demographics Screen Features

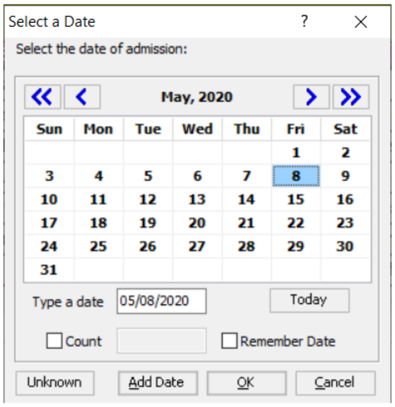
Feature	Description
Select All	Selects all clients.

Filter	Filters the client list (*i.e.*, Discharged clients, North Unit). Additional options for 'Other Demographics' are also available on this screen (*i.e.*, ability to filter clients based on age, birth month, search by record number, etc.)
Sort	Sorts the client list (e.g., by room number).
Common	Narrows down the client list based on something all clients have in common with one another (*i.e.*, CNA Assignment, all clients with an attending physician of Dr. Jane).
Refresh	Refreshes the client list to its default list.
Legend	Describes all the color-coded symbols (most useful in multi facility databases).

Face Sheets

Document a New Admission (Full Face Sheet)

1. From the ADT/Face Sheet Access screen, click **Admission**.
2. Select the client's name and click **OK**.
3. A write screen will load. Chart the appropriate information by working from left to right. Notice the screen is split into three sections: the <u>top portion</u> displays button words to select from, the <u>middle portion</u> is where your charting is developed, and the <u>lower portion</u> is a defined review that will show any prior documentation in each topic.
    a. Skip any questions that are unknown or do not apply.
    b. Several questions may ask for an **Effective Date** (*i.e.*, Occupancy Status, Payer Source, Admission Date). Select the appropriate date and click **OK**. To save the effective date used throughout all screens in the Face Sheet, place a checkmark in **Remember Date**.



4. Click **Sign** to advance to the next topic answering all appropriate questions as you go. When you are on the last topic and click **Sign**, you will be exited from that screen and returned to the ADT/Face Sheet Access screen.

Document a Re-Admission

1. From the ADT/Face Sheet Access screen, click **Re-Admission**.
2. Select the client's name and click **OK**.
3. A Write screen will load. Chart the appropriate information by working from left to right. Start by clicking where the client was **Readmitted From**. Then, chart the appropriate **Occupancy Status**. Click **Sign** to advance to the next topic. The Re-Admission button will prompt for updated **Status** charting, **new room number** (chart

new room with effective date, do nothing with the prior room number), as well as potentially **updated insurance information**.

   a. Several questions may ask for an **Effective Date** (*i.e.*, Occupancy Status, Payer Source, Admission Date). Select the appropriate date and click **OK**. To save the effective date used throughout all screens in the Face Sheet, place a checkmark in **Remember Date**.

4. Click **Sign** to advance to the next topic answering all appropriate questions as you go. When you are on the last topic and click **Sign**, you will be exited from that screen and returned to the ADT/Face Sheet Access screen.

Document a Discharge/Transfer/LOA

1. From the ADT/Face Sheet Access screen, click **Discharge/Transfer/LOA**.
2. Select the client's name and click **OK**.
3. A Write screen will load. Chart the appropriate information by working from left to right. Start by clicking the location as to where the client **Discharged To** or **Transferred To**. Then, document the appropriate **Occupancy Status**.
4. Click **Sign** when completed, and you will be exited from that screen and returned to the ADT/Face Sheet Access screen.

Document a Room Change

1. From the ADT/Face Sheet Access screen, click **Room Change**.
2. Select the client's name and click **OK**.
3. A Write screen will load. Click the new room number and select the Effective Date of the room change, then click **OK**.
4. Click **Sign** when completed, you will be exited from that screen and returned to the ADT/Face Sheet Access screen.

View/Edit Face Sheet Information

1. From the ADT/Face Sheet Access screen, click **View/Edit Face Sheet**.
2. Select the client's name and click **OK**.
3. Click **Exit** to return to the ADT/Face Sheet Access screen.

Edit Face Sheet Information

Example 1: When an entry WITH an EFFECTIVE DATE is incorrect (*i.e.*, wrong admission date charted entry on incorrect client)

1. Follow steps above for View/Edit Face Sheet Information.
2. Click the incorrect entry to turn it red. This is called "tagging" the entry. You may tag multiple entries if all are incorrect.
3. Click the **Edit** button and select **Archive Selected**. A box will appear and ask: *'Are you sure you want to archive all selected entries?'* Click **Yes**.
4. The entry or entries will appear gray to show the edit is complete.
5. If needing to chart a new one in its place, re-tag the grayed-out entry.

6. Click the **Edit** button again and select **New**.
7. A Write screen will appear. Re-chart the correct information.
8. Click **Next** to save your changes and return to the View screen.
9. Click **Go** to refresh your screen and view the changes.
10. Click **Exit** to return to the ADT/Face Sheet Access screen.

Example 2: To change part of an entry WITHOUT an EFFECTIVE DATE (*i.e.*, change a primary contact's phone number)

1. Follow steps above for View/Edit Face Sheet Information.
2. Click the incorrect entry to turn it red. This is called "tagging" the entry.
3. Click the **Edit** button and select **Discontinue and Copy**. A box will appear and ask: *'Are you sure you want to DC selected Entry?'* Click **Yes**.
4. The old entry will appear grayed out to indicate it has been discontinued. A Write screen will appear with a copy of the entry. Make the appropriate changes to the copied entry.
5. Click **Next** to save your changes and return to the View screen.
6. Click **Go** to refresh your screen and view the changes.
7. Click **Exit** to return to the ADT/Face Sheet Access screen.

Example 3: To change an entire entry WITHOUT an EFFECTIVE DATE (*i.e.*, a resident changes his/her dentist)

1. Follow steps above for View/Edit Face Sheet Information.
2. Click the incorrect entry to turn it red. This is called "tagging" the entry.
3. Click the **Edit** button and select **Discontinue and New**. A box will appear and ask: *'Are you sure you want to DC selected Entry?'* Click **Yes**.
4. The old entry will appear grayed out to indicate it has been discontinued. A Write screen will appear. Document the updated information.
5. Click **Next** to save your changes and return to the View screen.
6. Click **Go** to refresh your screen and view the changes.
7. Click **Exit** to return to the ADT/Face Sheet Access screen.

Example 4: To remove an incorrect entry(ies) WITHOUT an EFFECTIVE DATE (*i.e.*, a resident's financial contact was inadvertently charted twice)

1. Follow steps above for View/Edit Face Sheet Information.
2. Click the incorrect entry to turn it red. This is called "tagging" the entry. You may tag multiple entries if needed.
3. Click the **Edit** button and select **Discontinue** to remove a single entry or choose **Discontinue All** to remove multiple entries at the same time. A box will appear and ask: *'Are you sure you want to DC selected Entry?'* Click **Yes**.
4. The entry or entries will turn gray to show the edit is complete.
5. Click **Go** to refresh your screen and view the changes.
6. Click **Exit** to return to the ADT/Face Sheet Access screen.

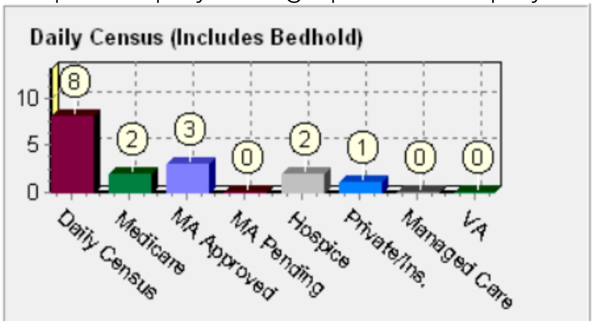
View/Print the Face Sheet

1. From the ADT/Face Sheet Access screen, click Face Sheet Report.
2. Select the client's name and click OK.
3. Click the Print icon to select printing options.
4. Click Exit to return to the ADT/Face Sheet Access screen.

Census Information

All the buttons located in the Census column are accessed within the same manner. Click the button, select the client name(s), and then click OK to run the report or calendar. Each button is described below in more detail. Click Exit once completed with viewing the task.

- Daily Census – This button will run a report which displays any census changes that have occurred today. This includes new admissions, discharges, room/payer changes, or bed holds. The bottom of this report displays two graphs, one displays census broken out by units and the other displays census broken out by payer source. All graphs in ECS are interactive, so if there is a data point you are interested in drilling down to, click onto that point on the graph and it will flip you to the specific charting. This report defaults to today's date, but the date may be adjusted to view prior days by clicking the Control button and changing the date. Then, Click OK to re-load the report based on the updated date.



- Statistics Calendar – This button will load a calendar defaulted to the Current Month. It will display the following statistics for each resident, their occupancy status, payer source, co-pay sources, room number, and level of service. A calendar report displays with one column for each day of the month. The bottom gives overall totals (which can be useful if wanting to know total Medicare or In-house days). To adjust the date range, click the Control button, select new dates, and then click OK to re-load the calendar based on the updated date.
- Room/Bed List – This button loads a report listing all rooms in the facility, broken out by unit/wing. All rooms will be listed, whether they are occupied or unoccupied. This assists users in easily determining what rooms are open. This will remain updated as room changes are made.
- Admission/Discharge - This button will first prompt the user to select dates. Enter a Start Date and End Date or click an option under Period. Once dates are selected, click OK to run the report. All Admissions, Re-Admissions, Discharges, and Transfers during the date range selected will display within this report. Change the date range initially selected by clicking the Control button, changing the dates, and then clicking OK to re-run the report.

Documents

Electronically Sign the Admission Agreement

1. From the ADT/Face Sheet Access menu, click Admission Agreement (e-sign).
2. Select the client's name and click OK.
3. The report preview will appear.
    a. If this report is not your facility's Admission Agreement and you would like it to be, speak to a support staff in the clinical department to assist in getting your Admission Agreement added to the system.
4. Click the Signature button in the top left corner to display a list of each page of the report as well as pages with electronic signature fields. One of two things will happen:
    a. A Signature box may automatically appear allowing you to sign the document(s), or
    b. You will be presented with a list of signature options. Double-click the desired signature field (such as "Signature of Responsible Party"). The signature box will then appear.
5. Have the appropriate person sign the document using a designated tool (*i.e.*, mouse, stylus, signature pad).
6. Click the Attach button to store the document in the client's record.
7. Click Exit to return to the ADT/Face Sheet Access menu.

Attach Scanned Document(s) to Client's Record

1. From the ADT/Face Sheet Access menu, click Scan Documents.
2. Select the client's name and click OK.
3. A Write screen will load.
4. Click the heading that corresponds to the type of document you are attaching to the record. A browse screen will appear allowing you to locate where the document is saved. Locate the document and click Open.
5. Select the date for the document.
6. Click Sign to save your entry(ies) and return to the ADT/Face Sheet Access menu.

View Scanned/Signed Documents

1. From the ADT/Face Sheet Access menu, click View Scanned/Signed Documents.
2. Select the client's name and click OK.
3. A View screen will load with all saved documents.
4. Hover over a document you would like to open until a scroll symbol appears. Click the scroll symbol to open and view the document.
5. Click Exit to return to the ADT/Face Sheet Access menu.

Other

Write an Internal Memo

1. From the ADT/Face Sheet Access screen, click **Write Internal Memo**. A Write screen will load.
    a. A message may appear *'This task has clients associated with it. Do you want to override your currently selected clients?'* Click **Yes** to this message. This will have you chart your memos on the fake Facility Services or Memo client.
2. Chart the appropriate information utilizing the **Message Regarding** and **Message** buttons.
3. Select an option under **Send To**. If you select '**Pick User on Save**', you will not be presented with a list of users until <u>after</u> saving the entry by clicking **Sign**.
4. Click **Sign** to save the entry and send it to any user(s) you had selected. This will return you to the ADT/Face Sheet Access menu.

View the Schedules

1. From the ADT/Face Sheet Access screen, click **Schedule**.
2. A list of various scheduler tasks will display. Click the desired task you would like to view and click **Load.** Schedule options may include: In House Visits/Consults, Out of Facility Appointments, and Transportation.
3. A scheduler screen will appear. If desired, change the view using the **Day/Week/Month/Year** buttons and the forward/backward arrows at the top of the screen.
4. Double click an appointment to view the details. Click "**X**" to close out of the details.
5. Click **Exit** to return to the ADT/Face Sheet Access menu.