

# Onboarding New Staff

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## Key Elements

With the constant rate of staff turnover, it is important that ECS System Supervisors are aware of all steps involved in onboarding. These steps are outlined below and described in further detail throughout this handout. There are additional reference handouts attached to this webinar as well that can be used to provide new staff members who are new to ECS.

## Checklist

|  |  |
|--|--|
| Gather user information                    |  |
| Create new user in ECS                     |  |
| Create new provider in ECS (if applicable) |  |
| Create new <i>Client Sign On</i> user      |  |
| Provide training                           |  |
| Provide training materials/guidance        |  |

## Supplemental Handouts

1. User Setup
2. Fake Residents for Practice
3. Core Training
4. Surveyors (NH)
5. Client Sign On Guide

## Gather User Information

Before setting up a new user, you will want to determine a few things. First, you will need to know if they are a temporary employee, such as a nurse aide/nurse student, who will not be at the facility long-term. If so, they may be setup as a temporary user, rather than a regular user. The only difference between temporary and regular is that temporary users allow for you to enter in an end date which no longer allows access to the system with that username after that

date. This works well if you know for sure that the temporary user will not be in the building past the date, however, should not be utilized if you are ever unsure. The end date of a temporary user can be continually extended if needed.

Another user that differs from others is a surveyor. Although their setup is very similar, they will have a different handout made available to them. In addition, you will want to have someone check the entire survey user group access to ensure that all buttons work correctly and load as they are intended. Even the slightest change in a surveyor user group can cause unattended disruptions in their access. It is important to test out the survey user group frequently.

Once you have determined if they are a surveyor or a temporary user, then you will want to gather the necessary information to get them setup as a user:

1. First Name
2. Last Name
3. Middle Name or initial (this field is not required and may be left blank if needed)
4. Job Title
5. Preferred Login Name (most facilities have a standard they follow for login names)
6. User Group the user should be placed into (the options available will vary per facility, each user should be placed into a group that most closely aligns with the access they need)
7. Whether they would like an enlarged font size or not (ECS defaults to size 8 fonts, which tends to be small for some users, a user may not know if they want enlarged font until after they begin using ECS which is OK as this can be adjusted at a later time if needed)
8. Which clients they should have access to (if your facility is a stand-alone nursing home, there is no need to determine this, however if your facility is a community of care campus with several levels of care, you will want to know which site(s)/service(s) this user should have access too).

Once all information has been gathered, the next steps can be followed.

## Create New User in ECS

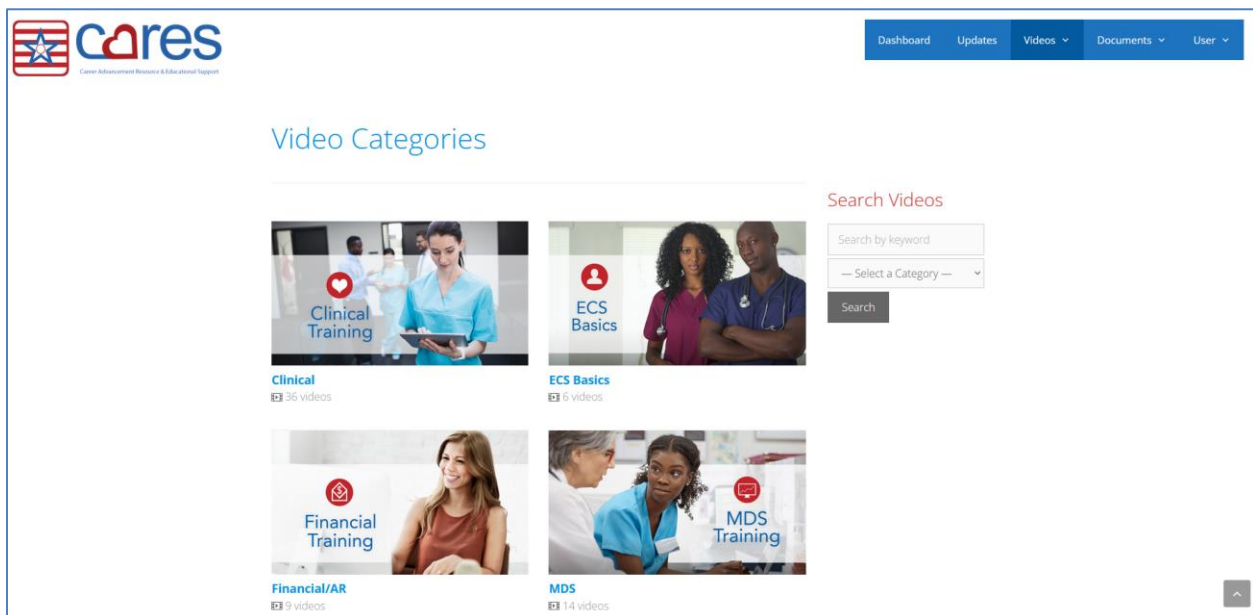
Reference the *User Setup* handout for further details regarding this topic.

## Create New Provider in ECS (if applicable)

Reference the *User Setup* and/or the *How to Enter in a Provider* handout for further details regarding this topic.

## Create New Client Sign On User

The Client Sign On is a location where ECS provides all our client training materials. These are included as part of your facility's maintenance fees and can be accessed by anyone at the facility who is provided with a login. The logins for the Client Sign On are managed solely by your facility. There is one person at each facility who acts as the facility "Administrator" of your accounts and who can freely add new users and inactive users no longer there. Not all staff will need access to the Client Sign On, however it is a great resource with training videos, webinars, and documentation that can assist the user in learning more about ECS and how to navigate it. If you are unsure who the Client Sign On Administrator for your facility is, feel free to contact us at American Data and we can provide you with that information.



Reference the *Client Sign On Guide* handout to learn how to setup a new user on this site.

## Provide Training

Basic training for ECS use may be provided during orientation, or directly on the job. However, it is important that some form of training occurs. Utilize the *Core Training* handout to better assist in which training may be useful to a new user.

## Using Fake Residents for Practice

With ECS, there is no test vs. production environment, but rather all users are in the production database every day. To complete training of new staff or to allow new staff members to practice within the production environment, we have fake residents built in that may be utilized. Any documentation, running of reports, starting of MDS assessments, etc. can be completed on these fake residents without harming the live environment.

It is important however that users are made aware of this option and are comfortable with filtering their name list to find these fake residents. Most of our facilities have the fake

residents stored in the “Other” filter, however there are some that have them stored somewhere else or keep them in the “Active” filter. Check to be sure where your facility has fake residents stored before utilizing the attached handout for new staff.

Utilize the attached handout titled *Fake Residents for Practice*.

## Provide Training Materials/Guidance

It is recommended that all users be provided with handouts which relate to their department. Keep in mind that as ECS is customizable, that the handouts provided on our Client Sign On may not match exactly to how your system is setup. However, some facilities have created their own custom handouts or have tweaked ours to match their workflows more closely.

Below is a list of recommended videos/documentation to be reviewed on the Client Sign On for different types of positions within your facility. If your facility has created more customized materials, those should be utilized prior to anything on the ECS Client Sign On site.

### MDS Coordinator

#### Videos

1. **MDS Category** > MDS 101, MDS Manager - About & Using, Writing CAA's, MDS Reports, IPA Forecast, ICD-10 Coding, IPA Predictor, Troubleshooting the MDS in a PDPM World, MDS Foundations, Survey Reports (672/802)
2. **ECS Basics Category** > Documenting in ECS, Log In/Exit/Hide, Editing Features, Using the View Screen

#### Documentation

1. **Clinical > MDS Category** > ICD-10 Coding, IPA Forecast, IPA Tools, MDS Coordinator, MDS Foundations, MDS Manager - About & Using, MDS Reports, Writing CAA's
2. **ECS Basics** > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications
3. **Clinical > Care/Service Plans** > Care Plans

### Dietary/Nutrition Department

#### Videos

1. **ECS Basics Category** > Documenting in ECS, Log In/Exit/Hide, Editing Features, Using the View Screen
2. **Clinical > Departments Category** > Dietary Department
3. **MDS Category** > Writing CAA's

#### Documentation

1. **Clinical > Departments Category** > Dietary Notes
2. **ECS Basics** > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications
3. **Clinical > MDS Category** > MDS (for Departments), Writing CAA's

4. **Clinical > Care/Service Plans > Care Plans**

## Activity Department Director

### Videos

1. **ECS Basics Category > Documenting in ECS, Log In/Exit/Hide, Editing Features, Using the View Screen**
2. **Clinical > Departments Category > Activity Department**
3. **MDS Category > Writing CAA's**

### Documentation

1. **Clinical > Departments Category > Activities Notes**
2. **ECS Basics > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications**
3. **Clinical > MDS Category > MDS (for Departments), Writing CAA's**
4. **Clinical > Care/Service Plans > Care Plans**

## Activity Assistant

### Videos

1. **ECS Basics Category > Log In/Exit/Hide**
2. **Clinical > Departments Category > Activity Assistant**

### Documentation

1. **Clinical > Departments Category > Activity Assistant**
2. **ECS Basics Category > Log In/Exit/Hide**

## Administrator

### Videos

1. **ECS Basics Category > Log In/Exit/Hide, Using the View Screen**
2. **Clinical > Other Category > Survey Entrance Checklist**
3. **MDS Category > Survey Reports (672/802)**

### Documentation

1. **Clinical > Departments Category > Administrator**
2. **Clinical > Surveyor Category > Survey Entrance Checklist**
3. **ECS Basics > Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications**

## Social Services Department

### Videos

1. **ECS Basics Category > Documenting in ECS, Log In/Exit/Hide, Editing Features, Using the View Screen**
2. **Clinical > Departments Category > Social Service Department**
3. **MDS Category > Writing CAA's**

## Documentation

1. **Clinical > Departments Category >** Social Service Department
2. **ECS Basics >** Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications
3. **Clinical > MDS Category >** MDS (for Departments), Writing CAA's
4. **Clinical > Care/Service Plans >** Care Plans

## Nurse

### Videos

1. **ECS Basics Category >** Log In/Exit/Hide, Chat Feature, Documenting in ECS, Editing, Using the View Screen
2. **Clinical > Nursing Category >** Chart an Admission Assessment, Using the Nursing To Do List (if your facility uses this feature), Chart a Medicare Note, Chart a Fall or Incident Note, COVID-19 Vaccination Charting, Using the MAR
3. **Clinical > Physician Orders Category >** Entering SS Insulin, Entering Allergies, Editing Medication Orders, Entering IV Medications, Entering Routine and PRN Meds, Entering Non-Formulary Meds
4. **Clinical > CNA >** CNA Access for Nurses

## Documentation

1. **ECS Basics Category >** Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications
2. **Clinical > Nursing Category >** Chart a Fall or Incident Note, Chart a Medicare Note, Chart an Admission Assessment, Electronic Sign, Nurses Notes, Using the Nursing To Do List
3. **Clinical > Physician Orders Category >** Editing Medication Orders, Entering Allergies, Entering IV Medications, Entering Non-Formulary Medications, Entering Routine and PRN Meds, Physician Orders (Non-Script)
4. **Clinical > Care/Service Plans >** Care Plans

## DON/Nurse Supervisors

### Videos

1. **ECS Basics Category >** Log In/Exit/Hide, Chat Feature, Documenting in ECS, Editing, Using the View Screen
2. **Clinical > Nursing Category >** Chart an Admission Assessment, Using the Nursing To Do List (if your facility uses this feature), Chart a Medicare Note, Chart a Fall or Incident Note, COVID-19 Vaccination Charting, Using the MAR, Specific Medications List
3. **Clinical > Physician Orders Category >** Entering SS Insulin, Entering Allergies, Editing Medication Orders, Entering IV Medications, Entering Routine and PRN Meds, Entering Non-Formulary Meds
4. **Clinical > Other Category >** Diagnosis Entry/Editing/Reports, Survey Entrance Checklist

5. **Clinical > CNA Category > CNA Access for Nurses**
6. **MDS Category > Survey Reports (672/802), Writing CAA's**

### Documentation

5. **Clinical > MDS Category > MDS (for Departments), Writing CAA's**
6. **ECS Basics > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications**
7. **Clinical > Nursing Category > Chart a Fall or Incident Note, Chart a Medicare Note, Chart an Admission Assessment, DON\_ADON\_Nurse Supervisor, Electronic Sign, Nurses Notes, Using the Nursing To Do List**
8. **Clinical > Physician Orders Category > Editing Medication Orders, Entering Allergies, Entering IV Medications, Entering Non-Formulary Medications, Entering Routine and PRN Meds, Physician Orders (Non-Script)**
9. **Clinical > CNA Category > CNA Charting (for Nurses)**
10. **Clinical > Care/Service Plans > Care Plans**

## CNA

### Videos

1. **ECS Basics Category > Log In/Exit/Hide**
2. **Clinical > CNA Category > CNA Access Charting**

### Documentation

1. **ECS Basics Category > Log In/Exit/Hide**
2. **Clinical > CNA Category > CNA Access Charting**

## Housekeeping

### Videos

1. **ECS Basics Category > Log In/Exit/Hide**
2. **Clinical > Other Category > Housekeeping**

### Documentation

1. **ECS Basics Category > Log In/Exit/Hide**
2. **Clinical > Departments Category > Maintenance**

## Maintenance

### Videos

3. **ECS Basics Category > Log In/Exit/Hide**
4. **Clinical > Other Category > Maintenance**

### Documentation

1. **ECS Basics Category > Log In/Exit/Hide**
2. **Clinical > Departments Category > Maintenance**

## Pharmacist

### Videos

1. **ECS Basics Category** > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen
2. **Clinical > Other Category** > Pharmacy Consultant

### Documentation

1. **ECS Basics Category** > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen
2. **Clinical > Departments Category** > Pharmacy Notes

## Infection Preventionist Nurse

### Videos

1. **ECS Basics Category** > Log In/Exit/Hide, Documenting in ECS
2. **Clinical > Nursing Category** > Specific Medications List
3. **Clinical > Infection Preventionist Category** > Infection Control in ECS, Employee Health (if used at facility), COVID-19

### Documentation

1. **ECS Basics Category** > Log In/Exit/Hide, Documenting in ECS
2. **Clinical > Other Category** > Employee Health Tracking
3. **Clinical > Nursing Category** > Charting COVID-19 Vaccines, Infection Preventionist, Infection Control Nurse

## Admissions

### Videos

1. **ECS Basics Category** > Log In/Exit/Hide, Enter A New Client
2. **Clinical > Face Sheet/Diagnosis Category** > Demographics & Face Sheets, Diagnoses, Marketing (if used at the facility)

### Documentation

1. **ECS Basics Category** > Log In/Exit/Hide, Enter A New Client
2. **Clinical > Face Sheet/Diagnosis Category** > Demographics & Face Sheets, Diagnoses, Marketing (if used at the facility)

## Therapist/Therapy Assistant

### Videos

1. **ECS Basics Category** > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Enter a New Client
2. **Clinical > Departments Category** > Therapy Administered



## Documentation

1. **ECS Basics Category** > Chat Feature, Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen
2. **Clinical > Departments Category** > Therapy Treatment & Notes, Therapy Administered
3. **Clinical > Care/Service Plans** > Care Plans