Pictures/Attachments and eSignatures

Click **American Data - ECS**, follow the path **Help > Videos**, and check out the **Electronic Signatures** video for additional information.

Digital pictures and scanned images may be stored in ECS. Client pictures are generally used for identification purposes in ECS. They may be printed on reports such as the face sheet or medication administration records and they may be displayed on the electronic sign and Write screens. Other pictures/images may be stored in ECS as well. Pictures of wounds, copies of insurance cards, or copies of lab reports may be placed on a client's record.

Because pictures take a lot of room to store and may slow down the system, American Data recommends purchasing a server for the pictures if your facility plans to store a large amount of images in the system. There are two ways to store pictures in ECS: as a picture file (.jpg, .gif, .bmp) or as an attachment (.tif, .pdf, .txt, .exe). Each has its advantages.

	Pictures	Attachments
Viewing	Pictures may be viewed in ECS by using the View icon.	Attachments do not appear on the view entries screen in ECS. A link stating "Picture" with a scroll attached is displayed in its place on the view screen. To view the attachment, double-click on the link. The application needed to view the attachment opens and the file appears. For example, if the attachment is a .pdf file, then Acrobat Reader opens and displays the file.
Printing	Pictures may be printed on ECS reports or the View screen.	Attachments cannot be printed on ECS reports. Attachments are printed from the application they are viewed in.
Write Screen	Pictures may be viewed on the Write screen.	Attachments cannot be viewed on the Write screen.
Sign Screen	Pictures may be viewed on the Electronic Sign screen.	Attachments cannot be viewed on the Electronic Sign screen.
How it affects ECS	View screens may load more slowly when displaying pictures.	View screen loading time is unaffected by the presence of attachments.

Pictures

Pictures may be stored in .jpg, .gif, or .bmp format. The file name should not include slashes or invalid characters (examples of invalid characters include @, #, ( ), *). Pictures can be stored on a Network or Local drive. Picture files are typically too large and need to be resized. The height and width should not be greater than 400 (i.e., 300 x 400 is acceptable). The picture file size should be less than 500K.

ECS has a picture re-sizer built into the system. When the user brings the image into ECS (either via a Write screen or via setup screen,) the image is opened in the re-sizer. The user may manipulate the size of the image. ECS does automatically shrink large photos to a more appropriate size so that the user may simply click OK on the re-sizer screen.

Document Pictures

Pictures may be documented in any area of ECS (from face sheets to nursing notes to physician orders). All systems have the ability to document a client picture for identification. This is the example that is used.

1. Click the Write icon.
2. Select the desired client and click OK.
3. Click Topic.
4. Select Face Sheet.
5. Select Client Pictures and click OK.
6. Click the question word. Question words are headings. On a Write screen, they are typically gray and in capital letters. Question words precede canned words/phrases and free type. The question words help define what the information that follows is about. For example, if the canned phrase "needs assist" is documented in the record without the question word "EATING," then no one would know what the client needed assistance with. Many reports and links in the system depend on the proper use of question words. "Picture".
7. Click the word "Browse for Picture". A browser window opens. Locate the picture file for the selected client.
8. Click on the file to highlight it and click Open.
9. The picture opens in the ECS re-sizer. You may adjust the image size or click to save the image size that ECS has selected. The file name is displayed in the text box.
10. Click Save and Exit.

View Pictures

1. Click the View icon.
2. Select the desired client(s) and click OK.
3. Click Topic.
4. Select the desired section (i.e., the section where the picture is documented).
5. Select the desired topic (i.e., the topic where the picture is documented) and click OK.
6. Click Go.

Print Pictures

Pictures may be printed two different ways in ECS. To print a picture from a view screen follow these steps:

1. Click the View icon.
2. Select the desired client(s) and click OK.
3. Click Topic.
4. Select the desired section (i.e., the section where the picture is documented).

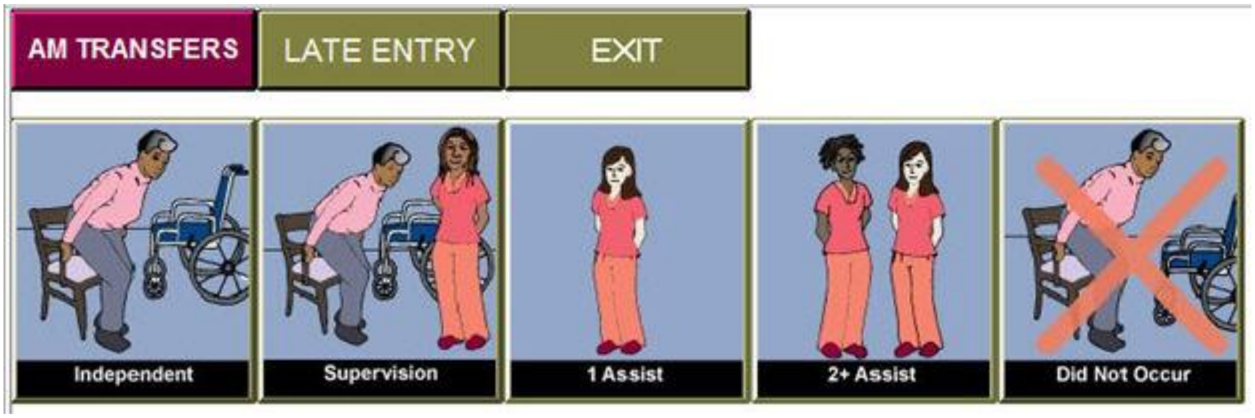
5. Select the desired topic (i.e., the topic where the picture is documented) and click **OK**.
6. Click **Go**.
7. Click the **Print** icon.

Pictures may be printed on reports. In order for a picture to appear on the report the picture must be linked to the setup of the report. For more information on setting up reports please refer to the Report Maker section of the manual. To print reports:

1. Click the **Reports** icon.
2. Select the desired client(s) and click **OK**.
3. Select the desired report (e.g,. Face Sheet) and click **OK**.

Use Pictures for Charting

Pictures may be added to the word grid in place of words. Instead of clicking on a word like "1 Assist," you can click on a picture of one assistant. When pictures are used in the documenting grid for charting purposes, the picture does not print in the chart. Instead, a word or words describing the picture are actually documented. Picture charting is used within our CNA Charting module in ECS.

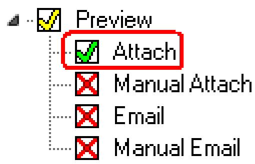


Attachments

Attachments may be stored in .tif, .pdf, .txt, or .exe format. The file name should not include spaces or invalid characters (examples of invalid characters include @, #, ( ), *). Attachments can be stored on a network or local drive. Attachments do not require resizing, but the file size should be less than 500K. Keep in mind that computers must have the ability to run the applications needed to open these attachments.

Create Report Attachments

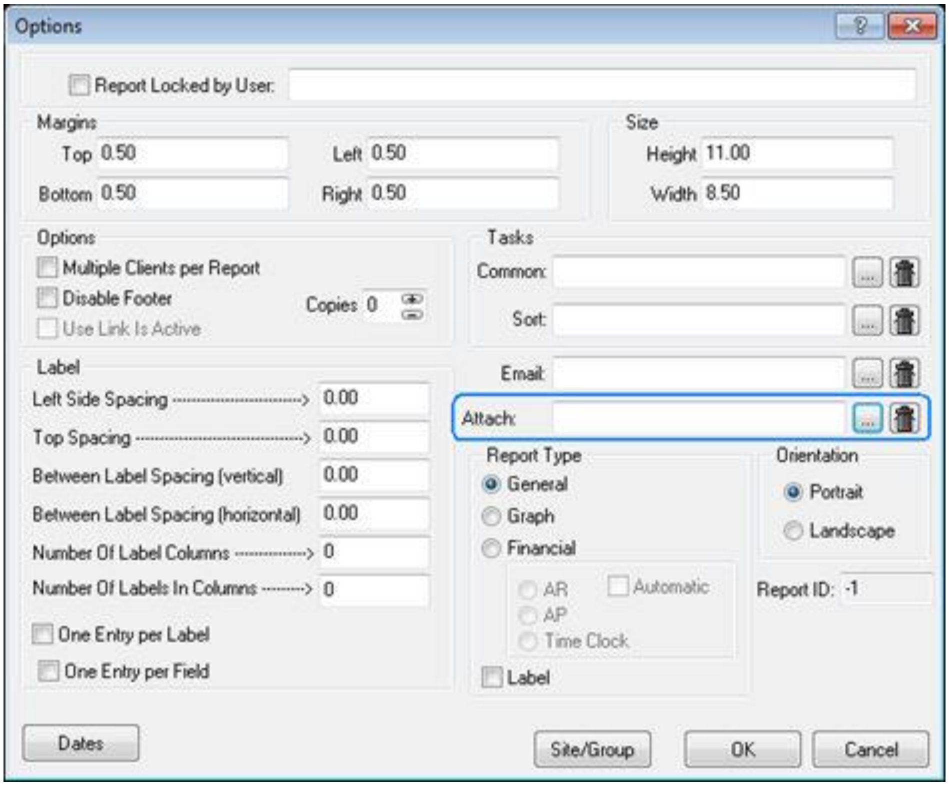
In order to save a signed report in a client's record, there has to be an attachment setup. This can be done by creating words related to the type of report within a topic. For example, the Scanned Documents folder within Face Sheet could have words setup to be the designated area for scanned items. Signed reports can be attached anywhere within the system as long as they can easily be found should they need to be reviewed.



To be able to attach reports to a patient's chart, the appropriate user group must be given the following right: **View > Preview > Attach.**

To create an attachment for a report:

1. Click the American Data – ECS button and follow the path Setup > Reports > Report Maker.
2. Click the Open icon, highlight the report to be edited, and click OK.
3. Once the report has loaded, click the Options icon.
4. Click the picklist next to the Attach field and pull in the word that you want the report to be saved under in the client's record. A report can only have one word that it will writeback to. To delete the path that has been saved within a report, click the trashcan icon.

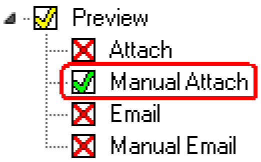


5. Click **OK** to close the Options window.
6. Click the **Save** icon to save any changes to the report.

Manual Attachments

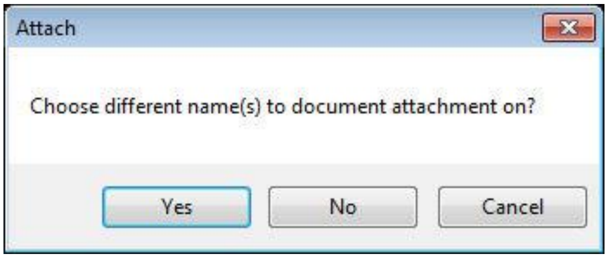
- If a report is not set up to be attached to the chart, the user has the opportunity to manually attach the signed document somewhere within the client's record.
- If a report is set up to be attached to the chart, the user still has the opportunity to attach the report to a different resident or to a different location in the chart.

To be able to attach reports manually to a patient's chart, the appropriate user group must be given the following right: **View > Preview > Manual Attach.**



To manually attach a report:

1. Follow the steps of setting up Signature fields within the report.
2. Preview the report in order to sign it as described in the above steps.
3. Once in the Preview screen, if there is no Attach set up on the report, this button will be greyed out. Select the Manual checkbox 
.
4. The Attach button will now be enabled. Click Attach. The user will be prompted with the opportunity to attach the report to different client's chart if they want.



5. If saving the report to the original client(s) selected, click No. The user will now be presented with the chart to select the path they want the report to attach to.
6. Once the path has been selected, click OK.
7. After the document has attached to the path that was selected, the user will be presented with Audit Results verifying where it was attached.
8. Click Close to exit the Audit Results.
9. Click Exit to close the Preview screen.

Document Attachments

Attachments may be documented in any area of ECS. Attachments are documented following the same steps as documenting pictures in a chart. The only difference is the file that is selected is of .tif, .pdf, .txt, or .exe format instead of the picture formats of .jpg, .gif, .bmp.

1. Click the Write icon.
2. Select the desired client and click OK.
3. Click Topic.
4. Select the desired section.
5. Select the desired topic.
6. Click the Question Word for the attachment/electronic file.
7. Click the word Get File/Attachment. A browser window opens. Locate the desired file for the selected client.
8. Click the file to highlight it and click Open. The file name is displayed in the text box.
9. Click Save and Exit.

View Attachments

1. Click the View icon.
2. Select the desired client(s) and click OK.
3. Click Topic.
4. Select the desired section (the section where the attachment is documented).

5. Select the desired topic (the topic where the attachment is documented) and click **OK**.
6. Click **Go**. The word "Picture" appears with a scroll icon in the View screen.
7. Close out of the attachment and view screen when finished.

Attachments may be added to report as well if desired with the picture or print files fields.

Print Attachments

There are two ways attachments may be printed in ECS: (1) from a View screen, or (2) from ECS reports.

Print from a View screen

All attachment types may be printed from a view screen barring that the computer has that program. For example, in order to print a Microsoft Word document from ECS, the computer must have access to Microsoft Word.

1. Click the **View** icon.
2. Select the desired client(s) and click **OK**.
3. Click **Topic** and select the topic where the attachment was documented and click **OK**.
4. Click **Go**.
5. A scroll appears on the view screen. Click on the scroll and the document appears.
6. Click **Print** on the document.
    - If using Adobe to preview reports, the main Adobe toolbar is hidden by default. The printer icon from ECS will appear with a paperclip which denotes "Print with Attachments". Click the chevron (double arrows) symbol to display the Adobe toolbar.

Print from ECS reports

Only one attachment may be pulled to an ECS report - PDF files. All other attachments must be printed from a view screen. In order to print PDF files from ECS reports, a report must be created with the link for the attachment. For additional information, refer to the Report Maker section of the manual.

1. Click the **Reports** icon.
2. Select the desired client(s).
3. Select the report specifically made to print these attachments and click **OK**.
4. Click **OK**.

Electronic Signatures

Incorporating electronic signatures on many of the reports we print from within ECS has many benefits including:

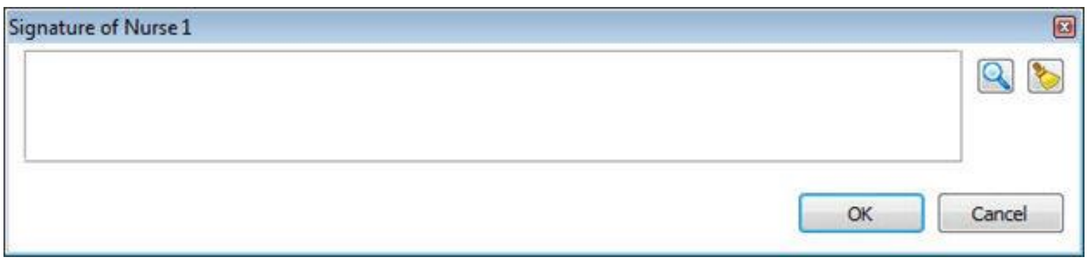
- Time reduced by not having to print, sign, scan, fax, or mail as many hard copies.
- Money saved by reducing the amount of paper and ink used from printing.
- Developing an archive to store the signed reports within the client's electronic medical record.
- The ability to send signed documents digitally to involved parties.

eSign Reports

After signature fields have been created, and writebacks have been set up, the reports are now ready to be signed within ECS and saved to the client's record.

To sign a report with a signature field

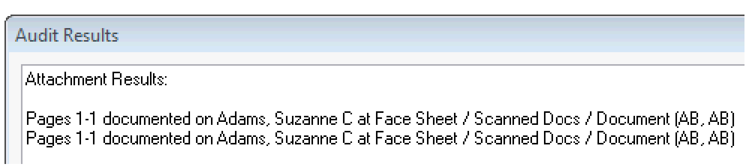
1. To preview a report, click the **Reports** icon.
2. Highlight the report to be signed, select the client(s), select any dates (if applicable), select the Preview checkbox, and click OK.
3. Once in the Preview screen, click the **Signature** button. A box detailing the title of the signature will appear.
    - This button will be grayed out if there are no signature fields detected on the report setup.
4. Place your mouse inside the box, hold down the left button, and sign your name.
    - To erase your signature, click the **Clear** icon and then re-sign in the box.



5. To make the signature box larger, click the magnifying glass icon.
6. Click **OK** to save the signature to the report.
7. If the report is not being written back into the client's record, the user may now print, save, or email the signed report from the Preview screen.

To attach a report with a signature field

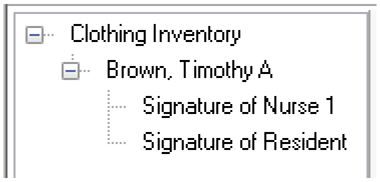
1. Complete the steps above to sign the report as normal.
2. Once in the Preview screen, an **Attach** button will appear if the report is set up to be attached to the chart. This button will be greyed out if there is no attachment on the report setup. Click Attach to save the signed report within the client's record. After the document has been attached to the path that was set up, the user will be presented with Audit Results verifying where it was attached.



3. Click **Close** to exit the Audit Results.
4. Click **Exit** to close the Preview screen.

Sign a Report with Multiple Signature Fields

1. Follow the steps of setting up signature fields within the report.
2. Preview the report in order to sign it as described in the steps above.
3. Click **Signature**. A panel will appear on the left side of the screen detailing the report name, the client selected, and the tile of the signatures that have been set up.



4. Double-click on the signature to be signed and the signature box will appear. Place your mouse inside the box, hold down the left button, and sign your name. Click **OK** once the signature has been obtained.
5. Complete this for all signature fields present on the report.
6. Attach or print the report if desired, and then click **Exit** to close the Preview screen.

Sign Multiple Reports with Multiple Signature Fields

Multiple reports with Signature fields set up can now be previewed at the same time. This allows the user to sign multiple reports at once, such as an admission packet of information.

1. Follow the steps of setting up signature fields within the report.
2. Preview the report in order to sign it as described in the above steps.
3. Click **Signature**. A panel will appear on the left side of the screen detailing the report names, the client selected, and the title of the signatures that have been set up.
4. Double-click on the signature to be signed and the signature box will appear. Click **OK** once the signature has been obtained.
5. If signature fields have the same identifier attached to them, such as the DON, the user will be asked if they want to apply the signature to all pages. Select **Yes** if the signature applies to all pages, or select No to only sign one signature field.

6. Complete this for all signature fields present on the report.
7. Attach or print the report if desired, and then click **Exit** to close the Preview screen..

Sign a Report for Multiple Clients

Multiple clients for one report can be previewed at the same time in order to obtain one signature to apply to everyone.

1. Follow the steps of setting up signature fields within the report.
2. Preview the report with multiple clients selected in order to sign.
3. Click **Signature**. A panel will appear on the left side of the screen detailing the report name, the clients selected, and the title of the signature that has been set up.
4. The signature box will automatically load if there is only one set up on the report.
5. Click **OK** once the signature has been obtained.

6. The user will be asked if they want to apply the signature to all pages because they have the same identifier. Select Yes to apply the one signature to all client pages.
7. Attach or print the report if desired, and then click Exit to close the Preview screen.

Sign Multiple Reports for Multiple Clients

Multiple clients for multiple reports can be previewed at the same time in order to obtain one signature to apply to everyone.

1. Follow the steps of setting up signature fields within the reports.
2. Preview the reports with multiple clients selected in order to sign.
3. Click Signature. A panel will appear on the left side of the screen detailing the report names, the clients selected, and the title of the signature that has been set up.
4. The signature box will automatically load if the identifiers are the same for all reports.
5. Click OK once the signature has been obtained.
6. The user will be asked if they want to apply the signature to all pages because they have the same identifier. Select Yes to apply the one signature to all client pages for all selected reports.
7. Attach or print the report if desired, and then click Exit to close the Preview screen.

Sign Multiple Reports with Multiple Signature Fields for Multiple Clients

Multiple clients for multiple reports can be previewed at the same time in order to obtain multiple signatures to apply to everyone.

1. Follow the steps of setting up signature fields within the reports.
2. Preview the reports with multiple clients selected in order to sign.
3. Click Signature. A panel will appear on the left side of the screen detailing the report names, the clients selected, and the title of the signature that has been set up.
4. Double click-on the signature to be signed and the signature box will appear. Click OK once the signature has been obtained.
5. The user will be asked if they want to apply the signature to all pages because they have the same identifier. Select Yes to apply the one signature to all client pages for all selected reports.
6. Complete this for all signature fields present on all reports.
7. Attach or print the report if desired, and then click Exit to close the Preview screen.

View Signed Documents

Once signatures have been obtained, and the report is attached to the client's record, these can be viewed at any time.

1. Click the View icon.
2. Highlight the name(s) of the client(s) and click OK.
3. Select Topic, and find the path where the report is set up to attach within the client's record.
4. Highlight the word(s) and click OK.

5. Click **Control** and use the Control window to define date ranges or other filters for the View screen.
6. Click **Go**. If a signed report has been attached, it will appear in the View screen similar to this:

7. Click on the folder  to preview the report.

Attachment Setup

A filing system for attachments should be established. Attachments should be organized by the type of attachments which are scanned and downloaded for easy retrieval in a view screen or report. For example, if the facility is planning on scanning lab information, they may want to setup a lab scan folder in nurses notes, so that all scanned documents from the lab can be found in one place.

1. Go to the **Setup** icon.
2. Click the tab the folder will be created in.
3. Right-click in a white space and choose **New**.
4. Select **Yes** to create a new topic.
5. Enter the topic name in the short name field.
6. Click **OK** to save the new topic.
7. Double-click the new topic.
8. Right-click in a white space and choose new to create a new word.
9. Double-click the NEW WORD.
10. Type in a short name such as **Attachment** (If setting up a lab folder, it might be called Lab Information:).
11. Select the **Question**, **List**, and **Entry Break** checkboxes located in the upper right hand corner of the screen.
12. Click **OK**.
13. Create a second new word right under the Attachment word. Follow steps 8 and 9 to create the word.
14. Type in a short name such as "get attachment" (If setting up a lab folder, it might be called "get lab attachment).
15. Select the **Picture** checkbox.
16. Click **OK** to save.