User Setup

Enter a New User

From the ECS System Supervisor Access menu, click onto the **Create New User** button or navigate via **American Data – ECS** > **Setup** > **Security** > **User**. This screen will load all active users within your facility's database in alphabetical order. Feel free to sort by any other column, by clicking onto the column heading. Keep in mind that if you only have rights to a specific facility within a multi-facility database, you will only see users who are in that site.

1. Click onto the **New** button to create a new user.
2. A **User Properties** screen will open. See below for a description of each tab.
3. Once all necessary tabs are addressed, click **OK** to create the new user.

Identification tab

- Fill in the user's first name, middle name or initial (if known), last name, initials (can be 3-4 characters long), job title, and login name. User initials do not need to be unique.
- Select the Group that the new user should be located in.
- The dot in status will default to Active which is where it should remain if you are creating a new user. For instructions on a Temp User Status, refer to *Enter a New Temporary User*.

Password tab

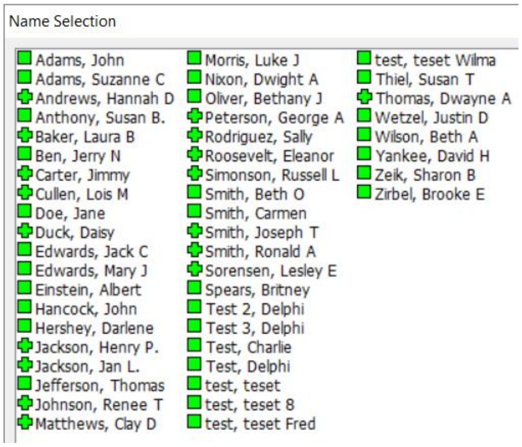
- Enter in a temporary password into **New Password** and **Confirm New Password** boxes. Unless the user is standing next to you and can type in their own password, a temporary password may be entered at this time. The following symbols may not be used in passwords: ; % +
- Place a checkmark in **User must change password at next Login** if you have setup a temporary password for this user to get logged in with initially.
- **Register Finger Print** and **Magnetic Card Reader** should be utilized in states where that form of verification is required.
- Place a checkmark in **Password Expires** if this user should need to reset their password every so many days (the number of days this occurs is setup in System Settings).

Options tab

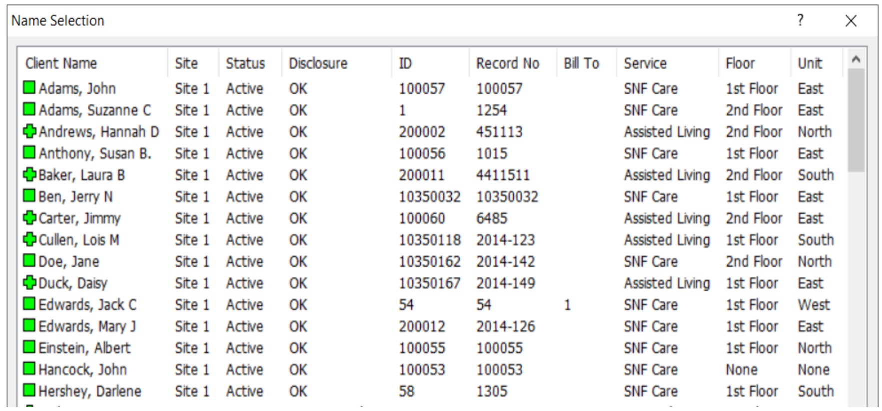
- If a user has requested enlarged font throughout the system, this can be adjusted here. Place a checkmark in **Enlarge Menus** to increase the font size of button words and pop-up menus, such as the name selection screen. Then enter in a number for the default font size (we do not recommend going above 12-14; the default is 8).
- Click onto the **F** button if the user would also like font size increased on the electronic MAR/TAR and in view screens. Adjust font size/style appropriately and click OK to save changes.

- **Show Detailed Name List** may be checked for those users who would like all basic resident demographic data on the Name Selection screen rather than only the resident's name. Typically, this is left un-checked.

Default Name List



Show Detailed Name List checked


Name Selection

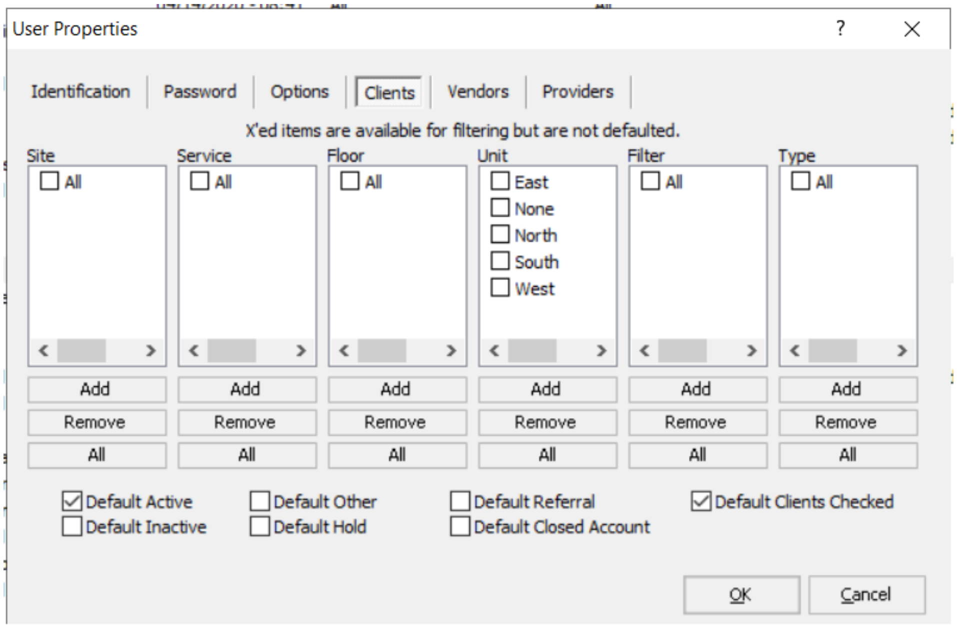
Client Name	Site	Status	Disclosure	ID	Record No	Bill To	Service	Floor	Unit
Adams, John	Site 1	Active	OK	100057	100057		SNF Care	1st Floor	East
Adams, Suzanne C	Site 1	Active	OK	1	1254		SNF Care	2nd Floor	East
Andrews, Hannah D	Site 1	Active	OK	200002	451113		Assisted Living	2nd Floor	North
Anthony, Susan B.	Site 1	Active	OK	100056	1015		SNF Care	1st Floor	East
Baker, Laura B	Site 1	Active	OK	200011	4411511		Assisted Living	2nd Floor	South
Ben, Jerry N	Site 1	Active	OK	10350032	10350032		SNF Care	1st Floor	East
Carter, Jimmy	Site 1	Active	OK	100060	6485		Assisted Living	2nd Floor	East
Cullen, Lois M	Site 1	Active	OK	10350118	2014-123		Assisted Living	1st Floor	South
Doe, Jane	Site 1	Active	OK	10350162	2014-142		SNF Care	2nd Floor	North
Duck, Daisy	Site 1	Active	OK	10350167	2014-149		Assisted Living	1st Floor	East
Edwards, Jack C	Site 1	Active	OK	54	54	1	SNF Care	1st Floor	West
Edwards, Mary J	Site 1	Active	OK	200012	2014-126		SNF Care	1st Floor	East
Einstein, Albert	Site 1	Active	OK	100055	100055		SNF Care	1st Floor	North
Hancock, John	Site 1	Active	OK	100053	100053		SNF Care	None	None
Hershey, Darlene	Site 1	Active	OK	58	1305		SNF Care	1st Floor	South

- Show **ECS Confirm Close** message may be checked if you would like the user to be presented with the following message when they exit out of ECS: "You are about to close all tabs and exit ECS." This may be useful for new users if they have multiple tabs open and accidently click the "X" which closes out of ECS completely rather than clicking the "X" on the one tab they meant to close.
- **CoSign Use** will only be utilized on physician/nurse practitioner users who only want to see orders within the Electronic Co-Sign tasks that have their name attached to them. American Data's clinical support staff can assist in determining whether you need to utilize this for your physician/NP users or not.

Clients tab

- The checkboxes at the bottom (Default Active, Default Inactive, etc.) are for setting which default clients the user will be presented with upon logging into ECS. A good standard to follow is that if it is a clinical user, only keep **Default Active** and **Default Clients Checked** (the default settings) in place. If it is a financial user, add a checkmark to **Default Inactive** and **Default Hold**. If it is a test user that should only ever have access to fake clients, only keep **Default Other** and **Default Clients Checked** in place.
- The only time that the checkmark in **Default Clients Checked** should be removed is if this user does not ever need access to client records. For example, if they are a Human Resource user, they will not need access to client records, but instead employee records (which is managed in the **Providers** tab).

- **Site, Service, Floor, Unit/Wing, Other**, etc. may all be restricted for users if needed. If a user only works in one service of a facility or only in one facility in a multi-facility database, then the clients they have access to can be restricted here. Restricting of specific floors and units may not be necessary however in case staff member float throughout the building. Click **Add** under any options that need to be restricted down. If an option should be available to the user, but should not display in their default list upon login (rather they would have to click Filter and then click onto the appropriate hidden option), an "**X**" can be placed into those options. For example, if a staff member works in the nursing home service 90% of the time, but also serves as an on call nurse for the assisted living, then you can click Add under Service and list both nursing home and assisted living. To the left of assisted living, click into the blank box to add a red "X." This means that by default the user will only ever see the nursing home clients unless they specifically filter for assisted living clients.



Vendors tab

This tab will only need to be adjusted if your facility is utilizing our Accounts Payable module and you are creating a new financial user who manages the AP module in ECS. Follow the instructions as seen above for *Clients tab* regarding checkmarks and restricting Site, Service, and other filter options.

Providers tab

This tab will only need to be adjusted if your facility is utilizing our Human Resources module and you are creating a new Human Resource user who manages the employees (providers) in ECS. Follow the instructions as seen above for *Clients tab* regarding checkmarks and restricting Site, Service, and other filter options.

Create a Provider

1. Once you click **OK** to creating a new user, you will be presented with a question, "*Do you want to add a provider for this user?*"
2. Click **Yes** if you anticipate that your facility may ever want to utilize ECS for Human Resource (tracking of employee evaluations, CEU's, employee health data, etc.)

3. The **Provider/Employee Properties** box appears. Some data will auto-populate. Enter in any additional information that is known or click **OK** to save the provider and advance to the **Locate** screen.
4. In the **Locate** screen, place a dot in **Active**, and select the **Site/Service** that this employee will primarily be working within. Select any other filters which are required (any in green text must be selected). Click **OK** once everything has been selected.

Enter a New Temporary User

Navigate via **American Data – ECS** > **Setup** > **Security** > **Temporary User**. This screen will load all temporary users within your facility's database in alphabetical order. Feel free to sort by any other column, by clicking onto the column heading. Keep in mind that if you only have rights to a specific facility within a multi-facility database, you will only see users who are in that site. Temporary users may be utilized for those users that are student nurses/CNAs or are contracted to only work with your facility for a short period of time.

Refer to *Enter New User* above for instructions on adding a new user into ECS. The differences between Temporary and New Users are:

- Temporary users will need dates setup in **Activation Time**. They will only be allowed access into ECS during the date range specified.
- Temporary users may only be placed into **Temporary User Groups**. If your facility does not already have **Temporary User Groups** created, this step will have to be done first. ECS defaults with a Temp User group for CNA's and Nurses.

User Management

Remove/Inactivate a User

If a user is no longer working at the facility, their user profile should be inactivated so they may no longer access the record.

Navigate via **American Data – ECS** > **Setup** > **Security** > **User/Temporary User/Portal User**. Right click onto a user name, and select Properties. Once in here, under User Status, set their status to Inactive. This will inactive their user profile. To access any inactive users, place a checkmark in **Inactive** in the lower right-hand corner of the screen.

Reset a User's Password

American Data cannot reset user passwords. This includes active users, temporary users, and portal users. Password reset is the responsibility of the facility.

Navigate via **American Data – ECS** > **Setup** > **Security** > **User/Temporary User/Portal User**. Right click onto a user name, and select Properties. Once in here, click into the **Password** tab. If your facility has **HIPAA User Security** enabled in *System Settings*, you will need to know the Old Password before resetting the new. You will notice in the Password screen that **Old Password** is enabled. This must be filled in prior to changing a user's password.

If the **Old Password** box is grayed out, you do not need to know the user's prior password to reset their password. Simply click into the **New Password** box and **Confirm New Password** and type in what the new password should be. Place a checkmark in **User must change password at next login** so that the user may reset the password to what they would like. If their account was locked due too many invalid attempts, you will notice a checkmark **in Account is locked due to too many invalid login attempts**. You will want to remove the checkmark in here before clicking **OK** to save the updated password.

Last Name or Title Changes

If a user has a name change or title change (e.g., from CNA to LPN, or LPN to RN), you will want to Inactivate their current user and create a brand-new user. This is because if you were to just change the last name or their job title, it will reflect all past documentation as well as all future charting. Obviously, we need it to be reflected in future charting, but because this is a legally binding signature in the record, a new user profile needs to be created to reflect changes going forward. Once the current user is inactivated, all past documentation will remain with that username and job title. Follow instructions above for *Remove/Inactivate a User* and *Enter a New User*.