Spring Clean Up

Within each ECS database, users have the capability to create their own custom topics, reports, sign tasks, etc. These items created may be the request of a specific user or something designed to respond to a survey citation. It is important however to maintain a database free of clutter and remove unnecessary tasks. In today's online seminar, we will discuss ideas for places to look for "clutter" within ECS as well as ways to clean up the system.

User List

The user list should always only have the active staff listed. You will want to make sure that as staff leave, they are moved to an inactive status so they may no longer access ECS. To access the user list, navigate to American Data – ECS > Setup > Security > User.

Once in the list, notice that the Last Login will display for each user. If this column is blank, it means that the user has not ever logged into the system. However, there may be users that are in the list and have not yet logged in, such as a new employee, or the state survey users. Confirm that the users you are inactivating no longer work at the facility or need access to ECS.

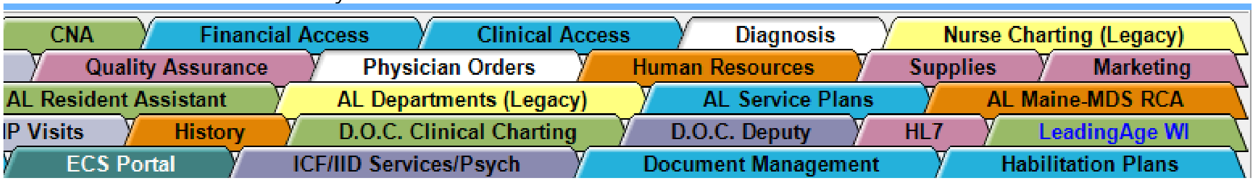
Once you have located a user to inactivate, double click onto their name, and place the dot in Inactive. Click OK to save changes. Do not adjust their user group as this may affect items that they had electronically cosigned.

New Feature Alert: To assist in finding a specific user more quickly, utilize the Search box (new feature coming out in the fall 2022 release). Thank you to one of our clients for this great idea!

Renaming Sections

As years pass, sections within ECS become obsolete. For example, in 2010, when MDS 3.0 was released, both the existing MDS tab as well as the RAPs tab were no longer needed. Now that over 10+ years has passed since the inception of MDS 3.0, there is no need to have these tabs still even in a read only state, but they can be named "Legacy" and moved out of the active section list that user groups have.

To rename a section, click onto the **Toolbar** and click onto the **Setup** icon. This will display all tabs/sections within the system.



If there is a section that is no longer in use, right click onto it and select **Properties**. Once in here, add "(Legacy)" to the end of the section name. This will make it easier to move these tabs out in the next step, which involves user group cleanup.

You may not be sure which tabs can be made legacy or not. An example of this remains with tabs that have been merged into databases with ECS updates. For example, your facility started ECS with a CNA and Nurse Charting tab. Your facility may have then switched to CNA Pictures at some point. Around the inception of MDS 3.0, ECS merged out a brand-new CNA Access tab to all our clients. This means that you may see three different CNA tabs. Most likely, they are not all in use, which means you will first need to determine what is being used/not used. Steps to troubleshoot this are below.

View Screen Search

1. Click onto the Toolbar.
2. Click onto the green **View** icon (or locate a **View Chart** easy button).
3. Select all resident name(s) and click **OK**.
4. Click onto **Topic** and navigate to a section that you are unsure is being used or not.
5. Click onto **All** to highlight all topics. Click **OK**.
6. Change the **Date From** to just be back a few days or a week to start with (in case the section is being used).
7. Click **Go**.
8. If no charting displays, you will receive the message "Nothing Found." Continue to extend the Date From back until you confirm there hasn't been any charting within the past year or two.

Hiding Unused Topics

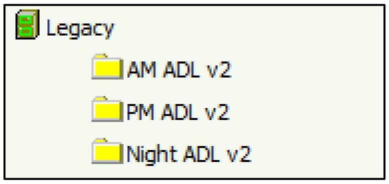
When topics are no longer utilized, they may be moved into a filing cabinet. This allows for them to be hidden from plain view when users are looking for a topic to document in or report on. Obviously, the less unused items that appear within a screen, the easier it is for a user to find what they are needing. One way of hiding unused topics is to create a cabinet within a section.

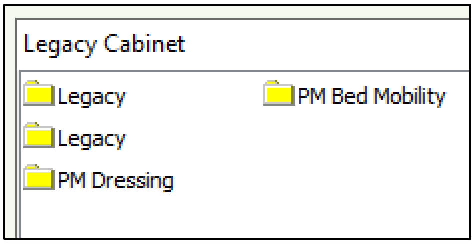
Create a cabinet

1. Click onto the Toolbar and onto the **Setup** icon.

2. Navigate to the section with unused topics that can be hidden away.
3. Right click into a blank space and select **New**.
4. Click **Yes** when asked if you are sure.
5. The **Short Name** can remain as "New Topic" or you can rename it to be "Legacy Topics" however this name will not matter at this point in the creation. Click **OK** to create the topic.
6. Follow steps #3-5 to create a second topic.
7. Drag one of the topics onto the other one. This will create a filing cabinet.
8. Right click onto the filing cabinet and select **Properties**. This will allow you to rename the cabinet (i.e., Legacy Topics, Not Used, Read Only, etc.). Click **OK** to save the change to the name.

Once the cabinet has been created, you may now either drag topics directly into it or can place them below the cabinet heading. The decision made will most likely depend on whether users still need to be able to easily see the topics when in a view screen.





In this example to the right, we have a facility who still needs access to the ADL topics when viewing as they just transitioned from v2 to v3. Therefore, they want easy access to versions 2 yet. However, all other legacy topics that have not been in use for over 6 months are located within the "Legacy" filing cabinet itself. In this case, there is a combination of both in use.

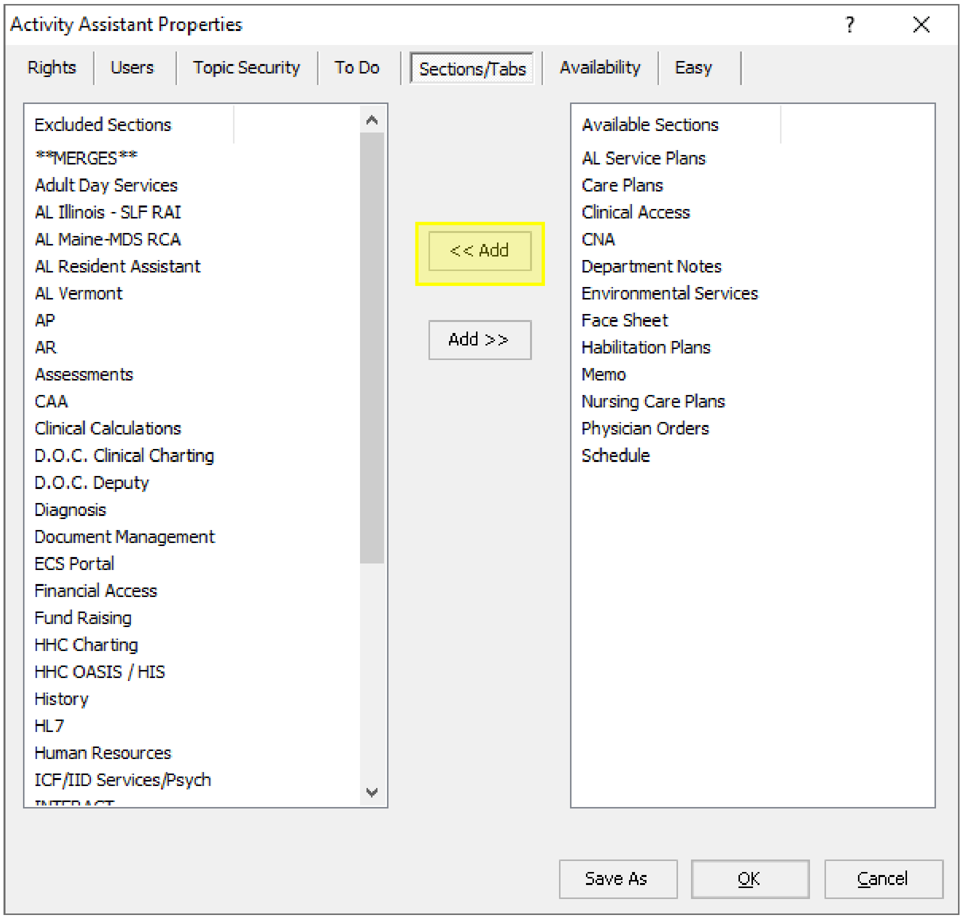
To determine what topic(s) may no longer be in use, follow the steps above in the View Screen Search section.

User Groups

Each user group has different task items that can be completed to assist within the cleanup process. Some are for all user groups; others are for specific types of user groups.

Sections/Tabs

Every user group in ECS can benefit from excluding sections that are no longer needed or that were merged in at some point but were not restricted. To access user groups, navigate to American Data – ECS > Setup > Security > User Groups. Within here, go through each user group by double clicking to access the Properties screen. Flip to the Sections/Tabs tab. Remove any unnecessary sections for each group but adding them from the Available Sections to Excluded Sections.



It may be difficult to determine which groups need or do not access to each section as you are unsure if they are utilizing pieces of it. Keep in mind that this Sections/Tabs means that they will have rights to either view or write within there. That means that although a CNA does not need access to write in the Face Sheet or Physician Order sections, there is information in both (i.e., room number, allergies, code status) that they will need access to view on their reports. This means that a CNA user group should still contain both of those sections.

One section that can be in excluded for ALL user groups is the ***MERGES*** section. This is only utilized by AD staff when completing a merge request. Users do not need access to this to utilize the newly merged in items.

Other sections that can be restricted from all user groups are any that were renamed with Legacy (i.e., Diagnosis, MDS, RAPs, etc.)

User Group Examples (Section Restrictions)

1. NH – CNA > Available sections include Care Plans, CNA, Document Management, Environmental Services (Facility Services), Face Sheet, Memo, Physician Orders, Schedule, and Supplies.
2. NH – Nurse > Available sections include Assessments, CAA, Care Plans, Clinical Access, Clinical Calculations, CNA, Department Notes, Diagnosis, Document Management,

Environmental/Facility Services, Face Sheet, INTERACT, MAR/TAR, MDS, Memo, Nursing, Physician Orders, Quality Assurance, Schedule, Supplies, and Therapy.

3. AL – Med Tech > Available sections include AL Resident Assistant, AL Service Plans, Diagnosis, Environmental/Facility Services, Face Sheet, INTERACT, MAR/TAR, Memo, Nursing, Physician Orders, Quality Assurance, Schedule, and Supplies.
4. Activity Assistant (shared between AL and NH) > Available sections include AL Service Plans, Care Plans, Clinical Access, CNA, Department Notes, Environmental/Facility Services, Face Sheet, Memo, Physician Orders, and Schedule.
5. Accounts Receivable (that oversees entire campus) > Available sections include Adult Day Services, AR, CNA, Department Notes, Diagnosis, Document Management, Face Sheet, Financial Access, MDS, Memo, Nursing, Physician Orders, Physician/PA/NP Visits, Supplies, and Therapy.

Rights Tree

In the Rights tree, a red X indicates the user has no rights to that feature, whereas a green checkmark indicates full rights to the feature.

Within here, there are several features that all user groups should be granted access too. This includes Hide ECS, Exit, and Help > What's This and Help > About.

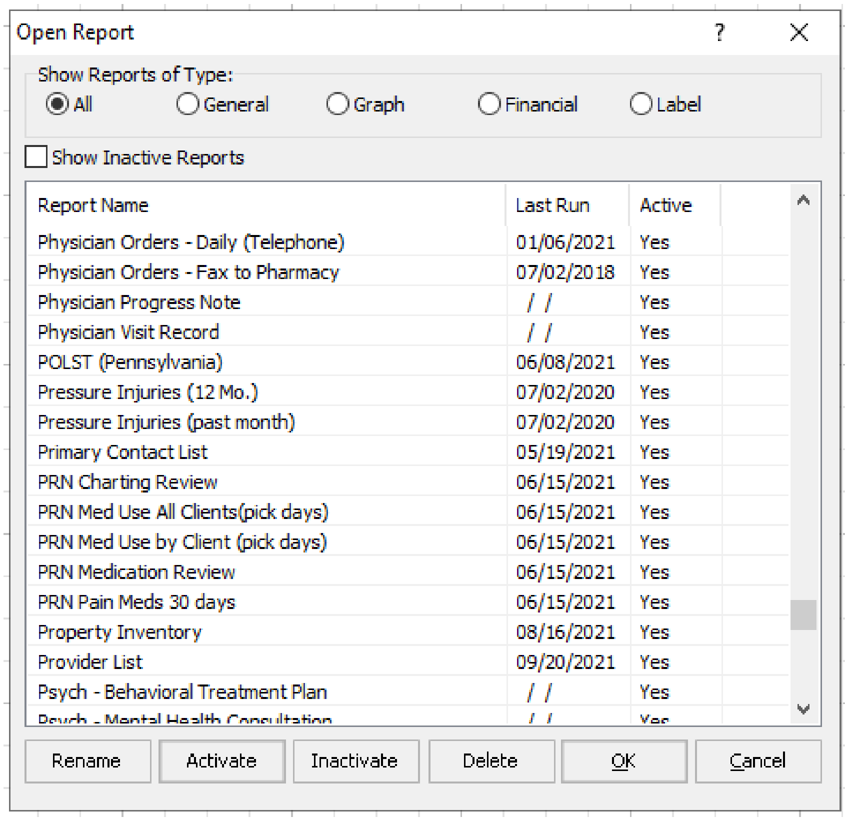
If the user group is an MDS Coordinator group or one that has access to delete an MDS, they should also have access to restore a deleted MDS. If within, Write > MDS 3.0 Assessment, you notice that Delete has a green checkmark, this means that user group should also be able to restore a deleted assessment (in case this is completed in error). This feature is found within Maintenance > Restore Deleted/Incomplete MDS 3.0.

General/Graph Reports

A favorite feature of many ECS System Supervisors is the capability to inactivate reports. This allows for a less permanent solution to keeping the report list cleaned up. In addition, makes it easier to hide reports from users. There are two ways to inactivate reports. The route chosen may depend on your knowledge of each report and whether you are planning to inactive large groups at a time or complete the process one by one.

Report Maker Screen

Start by accessing report maker via American Data – ECS > Setup > Report > Report Maker. Once in here, click onto the Open icon. By default, all report types (general, graph, financial, and label) will display, as well as only active reports. Any reports that have already been inactivated will not display. To show the inactive reports, place a checkmark in Show Inactive Reports. To narrow down the list to only certain types of reports, move the radio dot into the appropriate location.



Notice that the report listing will display the **Last Run Date** which indicates when this report was last run within the system. You may be included to start inactivating all reports without a date or with a date that is over a year old, however, note that some reports may only be run at the end of the year/fiscal year and therefore may not have a very current "last run date." Keep this in mind as reports are being inactivated.

Within this view of the reports, it is easy enough to open a report to look at the setups and see what the intent of the report is. That may assist in deciding whether the report is needed or not. You may then come back to this screen, highlight the report, and click onto **Inactivate**. Another option is to make the report inactive while it is open. Within the overall report **Options**, there is a checkbox titled "Active." If this checkmark is removed, the report will no longer be in the active report list.

Tasks/Reports Screen

If you have a larger group of reports to inactivate or if you do not need to view any of the report setups before moving them to inactive, you may go to the Tasks/Reports screen. This is accessed via **American Data – ECS > Setup > Security > Tasks/Reports**. Once in here, in the Types box, select either General Reports, Financial Reports – AP, Financial Reports – AR, or Graph Reports. Click onto **Display**. In the middle portion of the screen, the list of reports will display. The Last Run date will also display. All active and inactive reports will display.

Tip: The Tasks/Reports screen is a great way to view all reports, regardless of their active status.

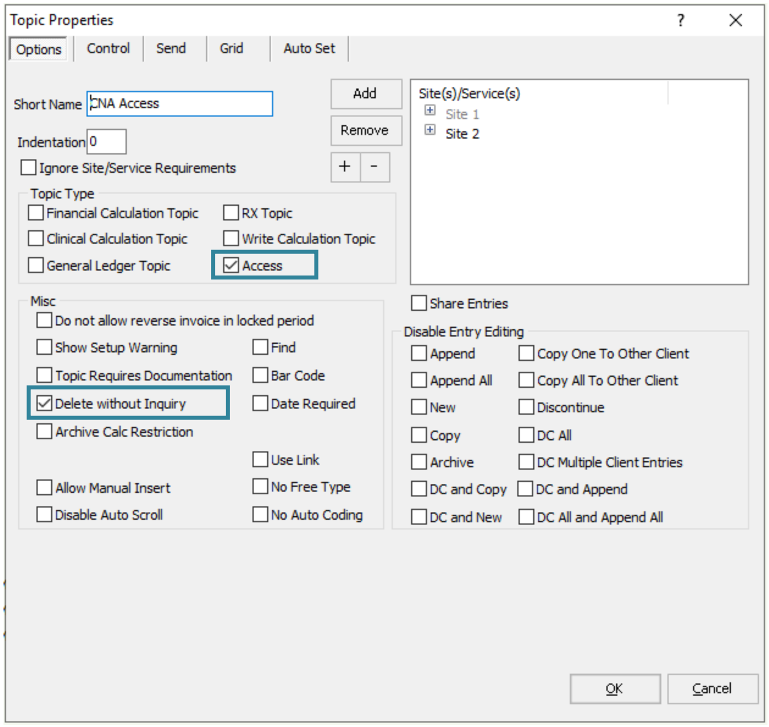
Highlight a report, or multiple reports, and click onto **Inactive**. You may also turn reports back to Active within this screen if they were moved to the inactive status inadvertently.

Examples of reports that can be inactivated:

1. Any reports that have a "Z" in front of them. Prior to this enhancement, this was a way for users to bump reports to the bottom of the list and out of user's view.
2. Excess face sheet reports (if your facility is utilizing Face Sheet 1, the extra Face Sheets can be made inactive).
3. Excess CNA reports for 8- or 12-hour shifts (dependent on which shifts your CNAs have, you may be able to make some inactive).
4. Any duplicate reports (sometimes a facility will make a 2nd version of a report with updates, but want the original to remain in the system, or a report may have been merged in with an updated module and the original report is no longer needed).
5. Reports for service levels your facility does not have (ADS, AL, SNF).
6. Different formats of reports (the physician order report has several different formats available for clients to select from; if your facility has one that you use, all others can be inactivated).

Access Screens

Within ECS, we reiterate to never delete any words within the documenting screens as this will remove that from the resident's record. However, access screens are the exception to this rule. Access screens are just buttons that launch a task or take the user to a topic to document within. Because these are just launch pad buttons, deleting is perfectly safe and the only way to keep the sizing of the screen correct.



To adjust access screens, click onto the Toolbar and onto the Setup icon. Once in here, click into a section that contains the access screen. Right click onto the topic to access the **Properties.** To ensure access button deletion is as seamless as possible, you will want to double check that **Delete without Inquiry** is checked on the topic you are looking to adjust. Any topic that has a checkmark in **Access** should also have a checkmark in this box.

Within the setup of the topic, simply right click onto an access button that is no longer needed and select **Delete.** This will remove only the access button but will not remove the items underneath it that this was linked too. This means that if in the future, this is needed, it can be added back to the screen.

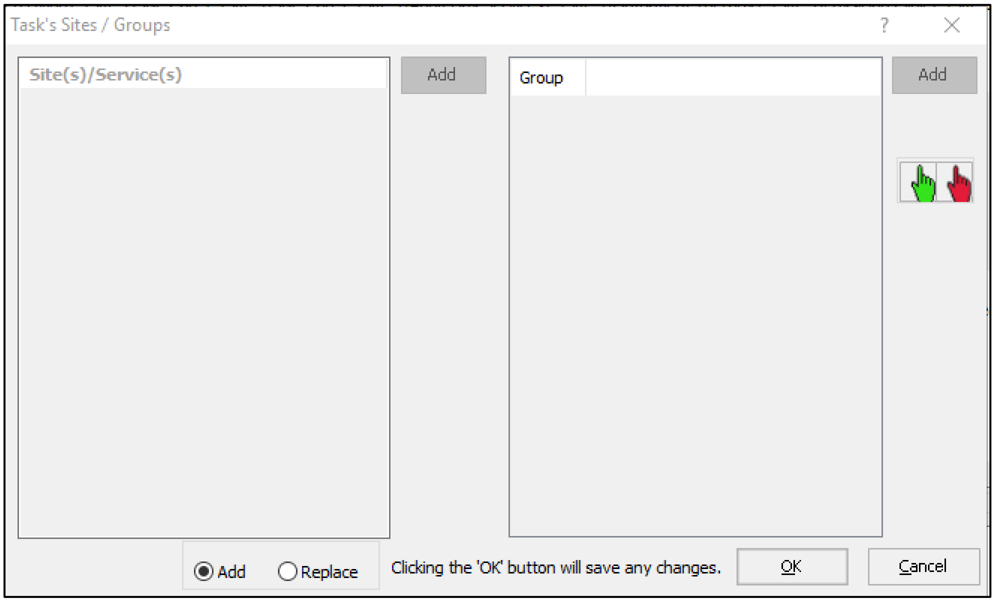
Hiding Other Unused Tasks

A favorite feature of many ECS System Supervisors is the capability to inactivate reports. Allow this is a very popular feature, we have not yet transitioned this to all task types of ECS. This means that the hiding of other task types, such as MAR/TAR tasks, view tasks, write tasks, etc. needs to be completed differently. The easiest way to complete this is via the Tasks/Reports screen.

Tasks/Reports Screen

This is accessed via **American Data – ECS > Setup > Security > Tasks/Reports**. Once in here, in the Types box, select the task type you are wanting to clean up. Click onto **Display**. In the middle portion of the screen, the list of tasks will display. The Last Run date will also display if you select any of the following task types: Calendar, Common Task, Sign Task, or View Entries Task. All other tasks will display the Last Run and Active column, but these are not functional at this time.

Once you have found a group of tasks that can be hidden, start by highlighting them all. Then right click and select **Edit**. This will open a global rights screen. To the right of the **Group** box, double click onto **Add**.



Select only the <u>Default Group</u> and click **OK**. Place the dot in **Replace**. Click **OK** to save changes. This "hides" all the selected tasks into the Default user group, which no active users can be in. Because of this, it will hide the tasks from all other active user groups.