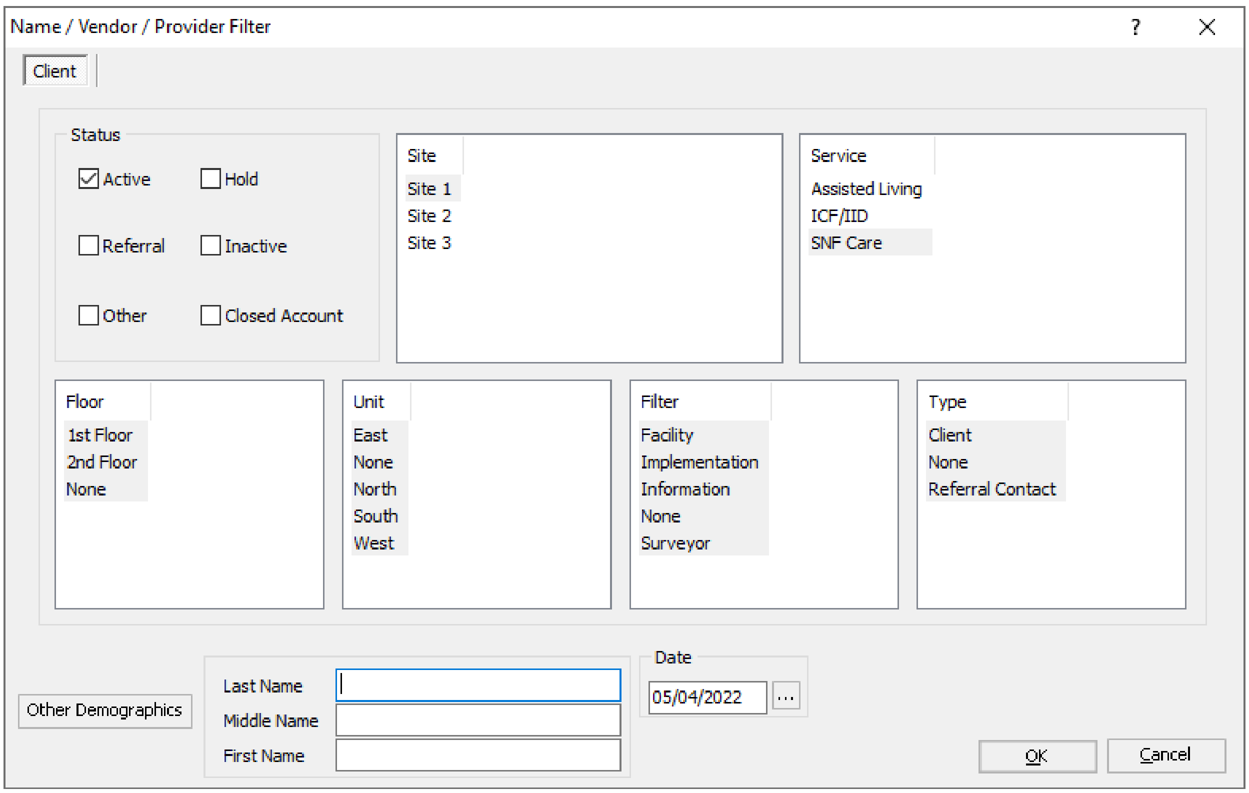
Navigating ECS in a Multi-Site/Service Database

To figure out if you are a multi-site or multi-service database, you will want to look on the Name Selection screen. This is where all site(s) and service(s) will be listed. You may also only have rights to one site/service so will only see one in the list, even though your facility is part of a larger organization. The below tips and tricks are presented with the intent of a user that does have rights to multiple site(s)/service(s) rather than just one.

Name Selection Screen

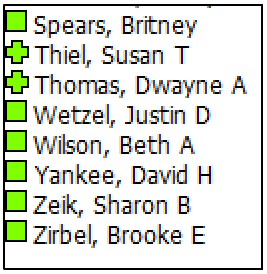


Utilizing the above filter screen is important when narrowing down your name list. Your facility's setups will decide what options you may filter by. This may include floor, unit, wing, provider, etc. Site and Service options will always remain and are useful in facilities that have more than one. Prior to completing any billing in ECS, you must always filter your name list down to the one site and service you are to complete billing on.

When running reports or viewing items for the entire campus or multiple campuses at one time, it is typically not necessary to narrow down the list via the Filter screen. However, that may depend on the type of report you are viewing. For example, a room/bed list is most likely setup to only display the occupied/unoccupied rooms for one service. This means that you may need to run separate reports for each list of names in the different sites or services.

MDS Assessments

MDS assessments may only be completed on a resident located in a NH or SNF service. There are times that users may not realize that a resident has been transferred out of the NH/SNF service and is now located in an AL service when they begin an MDS assessment on them. The reason this may at times be difficult to distinguish is because of the filter screen we reviewed above. The symbol to the left of each resident's name can only ever display one symbol at a time. This means that if you have rights to both the NH and AL service, you may see residents that are active or inactive in either. If a resident was active in the NH but is now active in the AL and you do not filter to only see NH residents, you will be viewing the resident name with the symbol as to the service they were most recently made active in.

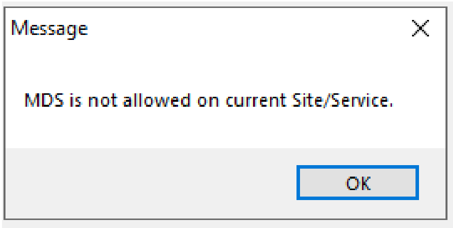


If you then start an assessment on the AL service, you will be unable to copy any of the information from the assessment over and you are not able to transmit this. Instead, a brand-new assessment needs to be created from scratch to be completed on the correct NH service name. If this has happened to you in the past, the good news is that with the release of 10.1.7.0, we have a new feature that allows a facility to stop any service from starting an MDS if they are not a SNF or NH service. This does take some manual intervention from someone at the facility, however.

Restrict Other Services From MDS

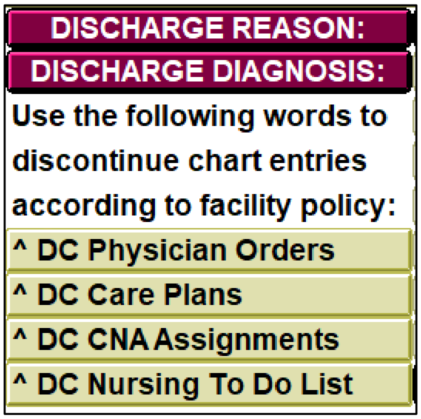
1. Navigate to American Data – ECS > Setup > Settings > Site.
2. Utilize the drop-down menu in the left-hand corner to select the correct site and service (you will be unchecking the "Allow MDS" box on any sites that may not complete an MDS).
3. Once you are on a site/service combination that cannot complete an MDS (i.e., assisted living, independent living, outpatient, adult day services) click into the MDS tab.
4. Remove the checkmark in "Allow MDS."
5. Click Apply to save changes.
6. Continue steps 2-5 above for all services that should not be able to start an MDS assessment.

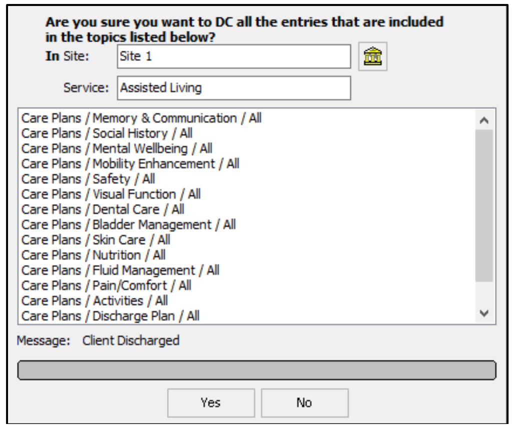
If a user tries to start an MDS assessment on the incorrect site/service combination, they will receive an error message.



Auto-DC Words

Most facilities have words that are setup to automatically discontinue entries once clicked onto. The most common place where these words are used is in the Status topics. To the right of the Discharged To column are a set of auto-dc words. When clicked onto, these words will prompt the user to select the appropriate site/service. This is important to pay attention to as your facility may be transferring the resident from one site/service to another within your same community. If this is the case, you want to be sure to not auto-dc all entries in case the receiving site/service had started to enter in any referral data or to build the medications list, or CNA assignments. Instead, you will want to click onto the house icon and select the site/service (if the one listed is not correct).





Moving a Resident Between Sites/Services

If a resident moves between a site/service to another within your community, there are a few steps to be completed within the Locate screen. This is because a resident may be active in one site/service at a time. A few exceptions exist, in the case of outpatient, where a resident may live in apartments and receive outpatient services. This is referred to as "co-existing" where two services allow for a resident to be active within them at the same time. This only applies to certain situations and is setup behind the scenes. If you are unsure if your facility has any "co-exist" setups in place, contact the clinical or financial department and we can look to let you know what is currently in place.

Moving a Resident from One Site/Service to Another

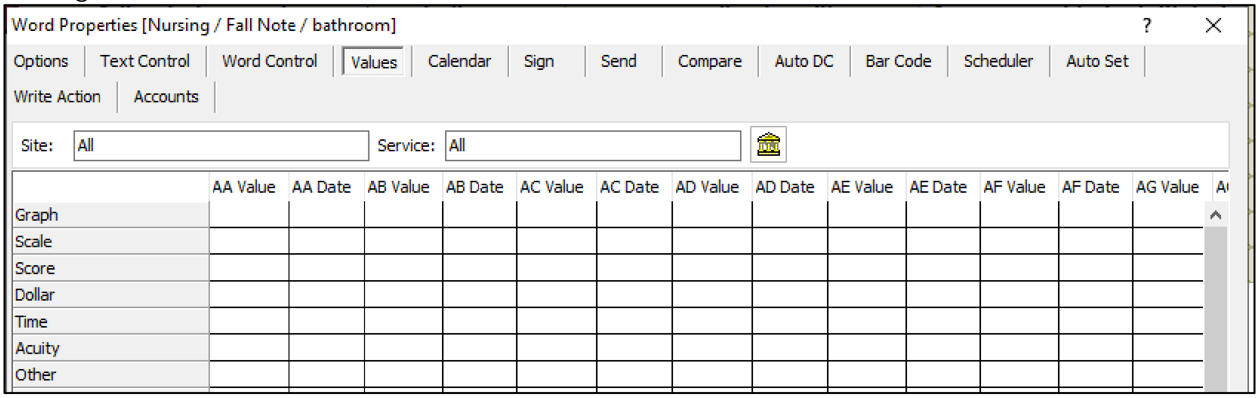
1. From the ADT/Face Sheet Access screen, click Add/Update Resident (or however you get to the ID/Demographics screen).
2. Right-click the resident's name and select Locate.
3. Select the picklist box next to Effective Date and select the date of the change (if different from today).
4. Select the status of Inactive, Hold, or Closed Account.
    a. When services do not "co-exist", the resident must be marked as Inactive, Hold, or Closed Account in one service before they can be marked as Active in the new service. A resident can only be active in <u>one service</u> at a time. For example, if a resident 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 resident's listed in the Inactive statuses.

b. When services do not "co-exist", and you wish to pre-admit a resident into a new service before they are discharged from the old one, you may put the resident in the new service under a Referral or Hold status (without altering the Active status of the original service.

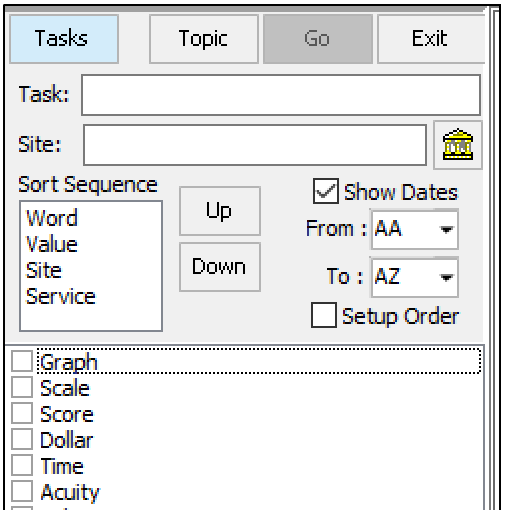
5. Click **Apply** to save the status change.
6. Enter the information for the new service. Select the **Effective Date**, a status of **Active**, the Site/Service, and any other required **Filters**.
7. Click **OK** to save and **Close** to return to the ADT/Face Sheet Access screen.

Change Site/Service Setups

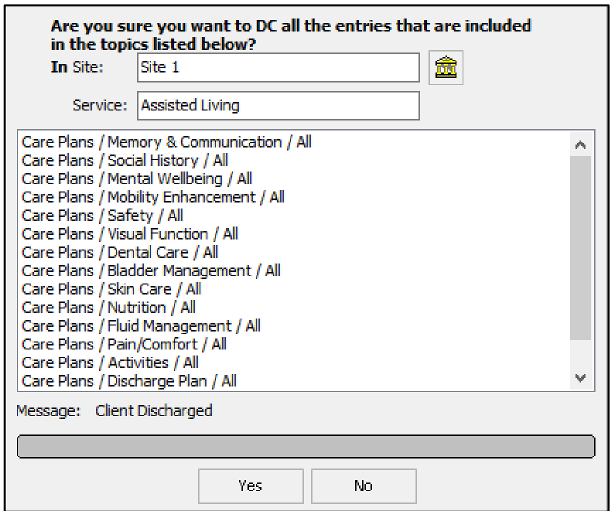
There may be instances where you are setting up values or adding headers to the sign icon, where you notice a house symbol. This symbol is used to adjust the site/service you are viewing and making changes for. Several examples of this icon are shown in different screens throughout ECS.



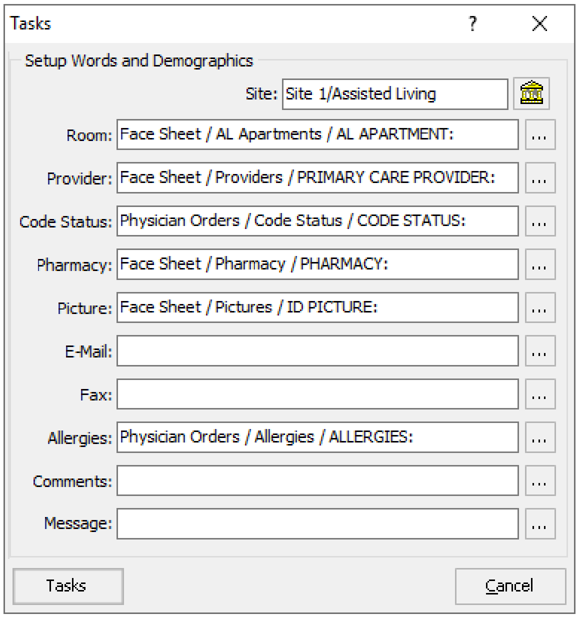
Word Properties > Value tab



Charge Master



Auto DC popup presented to the user



Sign Task Setup Screen

Notice that the yellow house symbol exists in each of the above screens. Utilize this symbol to select the site(s)/service(s) you are adjusting (or keep it set to All/All if appropriate).

A common support call to clinical is that the room number is not displaying on the MAR/TAR. When we get into the Sign Task Setup, we notice that the room number is linked under Site: All and Service: All. In a multi-site/service database, this setup will not work. The room number must be linked underneath the specific service for it to display correctly on the MAR/TAR.

Share Entries Feature

This is a topic property that allows all entries made within the topic it is checked on to be shared between the sites/services that have rights to that topic. This feature is used most in databases where there is one facility with an AL and SNF and they do not need to re-document face sheet information between the two services. In addition, some facilities choose to enable this on physician order topics.

This does mean that all entries made within the topic(s) will be part of the resident's record no matter which site/service they are located in. Without this checked, when a resident moves either between sites or services, the topic is treated as a separate entry. All documentation needs to be made again and the resident is transferred over with a "clean slate."

Whether this is enabled or not depends on your facility's workflow. If a resident were to transfer from Site 1 to Site 2, would your facility typically re-enter the medications, emergency contacts, etc.? Or would everything from Site 1 remain the same in Site 2? The same question comes into play with transferring between services. Would this information be re-entered, or would it just remain as is?

The feature is setup on a topic-by-topic basis, so a facility may decide which topic(s) should be shared vs. which will remain the same. Typically nurses notes, CNA charting, therapy administered, etc. will not be shared topics as this information will be documented by the new users in the new site/service as incurred.

Another item to keep in mind with this feature is that users then need to be comfortable with discontinuing entries made by users they maybe do not know and entries that are from a different locate status.

An example of that is found below. James Bond is in the AL service (a cross symbol), but as you can see, his medication orders were written in the SNF service (a square symbol). This is how entries appear when Share Entries is enabled on a topic.

Bond, James 04/03/1928 94 Yrs F Site 1 Assisted Living East		
07/31/2018 15:59:34 JMW	Levofloxacin 250MG Tablet	
	Dose:	(2 tablet / 500mg) by mouth daily 0800 x 21 days
	For:	Inhalational Anthrax (Pneumonia caused by Bacillus Anthracis Bacteria)
16:01:19 JMW	Acetaminophen 500MG Tablet	
	Dose:	(1 tablet / 500mg) by mouth daily prn
	For:	Pain
10/22/2018 15:36:10 HDC	LORazepam 1MG Tablet	
	Dose:	(1 tablet / 1mg) by mouth daily AM
	For:	Anxiety

Site/Service Specific Logo

Some reports, you may want to include a facility logo, however if the facility logo differs between sites/services, then prior to version 10.1.7.0 a facility was required to have multiple versions of the same report, just with a different logo. However, with the release of 10.1.7.0 came a new feature which allows for a facility to setup a service specific logo within Site Settings that can then be linked into the report. The report can utilize our new "Use Site/Service Picture" feature, which allows for only report to be in place. Setups for this feature are below.

Site Settings - Setup

1. Click into **American Data – ECS > Setup > Settings > Site**.
2. Utilize the drop-down menu in the left-hand corner to select the correct site and service you are uploading a logo too.
3. Click onto the **Picture** tab.
4. Click on the icon to the right of "Find Picture." Select the picture that should be the logo.
5. Click **Apply** to save changes.
6. Utilize the drop-down menu to select a different site/service combination to add a logo too.
7. Once all logos have been added, click OK to exit out of Site Settings.

Report Maker – Setup

1. Click onto **American Data – ECS > Setup > Report > Report Maker**.

2. Utilize the open icon to find a report which already has a picture/logo field on it or open one that you would like to add a picture/logo field too.
3. Adding a new picture field:
    a. Click onto the add field symbol and select Picture field.
    b. Place a check in Use Site/Service Picture.
    c. Click Close to save changes.
    d. Stretch out the field accordingly. The size of the field is the size the logo/picture will display on the report.
    e. Click the save icon to save the changes made to the report.
    f. Repeat above steps for all reports that need to look at the Site Settings picture.
4. Updating an existing picture field:
    a. Double click into the existing picture field.
    b. Place a check in Use Site/Service Picture.
    c. Click Close to save changes.
    d. Click the save icon to save the changes made to the report.
    e. Repeat above steps for all reports that need to look at the Site Settings picture.