j0397102

eFINDS Training

Instructor Guide

Commerce Training Institute

Rev. November 2013

# Table of Contents

[Table of Contents 3](#_Toc373321222)

[Patient Tracking with eFINDS 1](#_Toc373321223)

[Instructor/ Producer Guide 1](#_Toc373321224)

[Program Description: 1](#_Toc373321225)

[Timings 1](#_Toc373321226)

[Conventions used in this document 1](#_Toc373321227)

[Objectives: 2](#_Toc373321228)

[Target Audience: 2](#_Toc373321229)

[Class Preparation: 2](#_Toc373321230)

[Class Follow-up 2](#_Toc373321231)

[Welcome! 3](#_Toc373321232)

[Program Description 4](#_Toc373321233)

[Target Audience 4](#_Toc373321234)

[Objectives 4](#_Toc373321235)

[Syllabus 5](#_Toc373321236)

[Prework 5](#_Toc373321237)

[Access to eFINDS 5](#_Toc373321238)

[Contacts & Logistical Training Information 6](#_Toc373321239)

[Instructors 6](#_Toc373321240)

[Technical Support for your Organization 6](#_Toc373321241)

[My HCS Coordinator(s) 6](#_Toc373321242)

[Course Work for CTI-500 7](#_Toc373321243)

[Chapter 1: Overview 8](#_Toc373321244)

[Technical Questions? 8](#_Toc373321245)

[Non-technical Questions? 9](#_Toc373321246)

[Actions of an evacuating facility: 11](#_Toc373321247)

[Actions of a receiving facility: 11](#_Toc373321248)

[Chapter 2: Role and Permissions 13](#_Toc373321249)

[List the role names and the tasks they can accomplish. 13](#_Toc373321250)

[Verify your role assignments and update your person record 15](#_Toc373321251)

[Verify Role Assignments 15](#_Toc373321252)

[Update your Person Record 15](#_Toc373321253)

[eFINDS Materials or What’s in the box? 17](#_Toc373321254)

[Chapter 3: Training Exercises 18](#_Toc373321257)

[Training exercise 1 20](#_Toc373321258)

[Training exercise 2 21](#_Toc373321259)

[Training exercise 3 22](#_Toc373321260)

[Training exercise 4 23](#_Toc373321261)

[Training exercise 5 24](#_Toc373321262)

[Training exercise 6 25](#_Toc373321263)

[Training exercise 7 26](#_Toc373321264)

[Training exercise 8 27](#_Toc373321265)

[Training exercise 9 28](#_Toc373321266)

[Training exercise 10 29](#_Toc373321267)

[Review Questions (10 minutes) 30](#_Toc373321268)

[Answer Key 31](#_Toc373321269)

# Patient Tracking with eFINDS

## Instructor/ Producer Guide

### Program Description:

This document is the leader and producer script for the eFINDS Commerce Training Institute course and should only be distributed to course instructors, their assistants, and their producers. Instructors, assistants, and producers are strongly encouraged to also have a copy of the participant’s guide available during each class session.

This curriculum includes these pieces:

1. a leader guide
2. a participant guide
3. a slide deck
4. a patient worksheet
5. a course participant tracking worksheet

Send your questions regarding the use of this curriculum to the Health Commerce System Trainers at hcsoutreach@health.state.ny.us.

This course is designed to be delivered in a traditional instructor-led classroom. Each instructor will need to make adjustments to the materials to personalize them, and is invited adapt them to their personal training style as long as core material is left intact. Below is a sample script instructors may use to learn the curriculum, rehearse, and get the timing of the material. Instructors are not expected to read the script word-for-word during course sessions.

### Timings

The timings in this document are for reference only, and specified by instructors very familiar with the application. Inexperienced instructors may need more time to complete the course. It is recommended that inexperienced instructors schedule 90 minutes for each training session.

### Conventions used in this document

Things you are to say to the audience are prefaced with bold Say: or Transition: labels.

Blocking, or the things you should demonstrate are denoted as blue highlighted block quotes.

The amount of time each segment should take to cover is listed at the top of each segment in the left column.

### Objectives:

#### As an Evacuating Facility

* Locate and open eFINDS on the Health Commerce System.
* Successfully register patients and residents with barcoded wristbands.
* Successfully register multiple patients or residents without pre-printed wristbands.
* Updated patients and residents information.
* Searched for patients and residents.

#### As a Receiving Facility

* Updated patients and residents with wristbands.
* Updated patients and residents without wristbands or barcodes.

### Target Audience:

The target audience for this curriculum is all state and local health department, hospital, nursing home, adult care facility, and temporary shelter staff who will be responsible for entering and maintaining patient tracking information in eFINDS during declared operational periods.

### Class Preparation:

#### Prior to Class

* At least one day prior to the class, Email all registered participants the participant guide and   
  other class materials.
* Ensure that all materials are up-to-date and that you are using the latest revision of the documents.
* Be sure to have added any custom information, such as your introduction slide, name and contact information to the slide deck and the participant guide.

#### Day of Class

* Make sure you have the latest revision of each slide deck you will use.
* Arrive 30 minutes early.
* Welcome each student as they arrive and check them in on the course participation tracking sheet.
* Load slide decks.
* Open the Health Commerce System.
* Pair learners from separate facilities for sending and receiving
* If learners bring training wristbands & scanners, go ahead and use them however, they are not necessary to complete the course work. If leaners did not bring wristbands, be sure to have them generate a paper barcode log to work with. Alternatively you can print the barcode log on label sheets to stick barcodes on paper patients.

### Class Follow-up

* Email the completed course tracking sheet to {insert email}
* Email students thanking them for attending and, if applicable, encourage them to complete   
  the course evaluation.

Customize this welcome letter in the participant guides you will be distributing.

# Welcome!

Welcome to the Commerce Training Institute’s CTI-500 course on the Evacuation of Facilities in Disasters Systems (eFINDS).

This course will prepare evacuating and receiving facilities on how to upload and update patient/resident location information in the eFINDS application on the Health Commerce System <https://commerce.health.state.ny.us>.

Sincerely,

{Name}

{Title}

{Organization}



# Program Description

This course provides a solid foundation for registering and updating patient/resident location information during a public health event, such as a storm, flood, non-natural incident or practice exercise/drill.

This course will begin with a look at how to obtain access to the eFINDS application, and how facilities will be notified that patient/resident location data is being collected. Course participants will be provided a demonstration of the new application including: user and administrator role permissions; how to register a patient/resident with a scanner and without; use a spreadsheet provided by the facility administrator role to register multiple patient/residents; update patient/resident tracking information; as an evacuating facility, and as a receiving facility; plus successfully update one patient/resident at a time, and then update multiples. As the facility administrator role, generate a patient/resident spreadsheet, as well as register multiple patient/residents without having wristbands available. The session concludes with hands-on exercises.

### Target Audience

The target audience for this curriculum is all state and local health department, healthcare providers, and temporary shelter staff who will be responsible for entering and maintaining patient/resident tracking information in eFINDS during declared operational periods.

### Objectives

#### As an Evacuating Facility

* Locate and open eFINDS on the Health Commerce System.
* Successfully register patient/resident with barcoded wristbands.
* Successfully register multiple patient/resident without pre-printed wristbands.
* Updated patient/resident information.
* Quick Search for patient/resident.

#### As a Receiving Facility

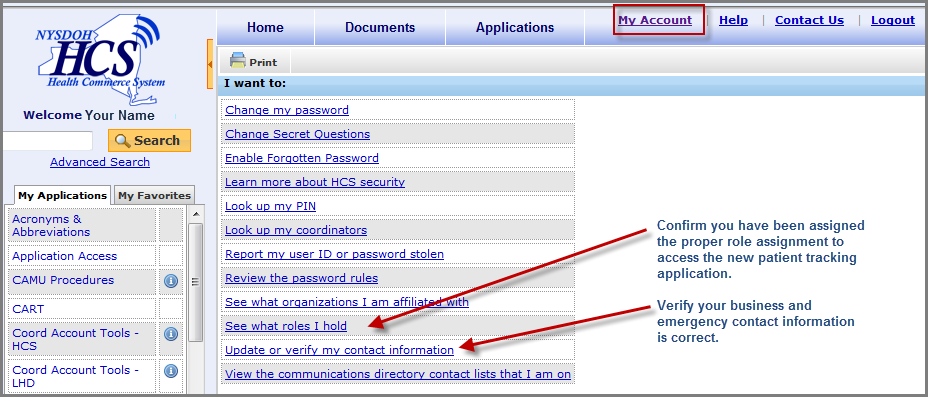
* Updated patient/resident with wristbands.
* Updated patient/resident without wristbands or barcodes.

# Syllabus

eFINDS

### Prework

1. Have your Health Commerce System user ID and password available for use
2. Verify that your business and emergency contact information is correct
3. Confirm you have been assigned the proper role to access eFINDS



# Access to eFINDS

Role assignments will be granted by the facility’s Health Commerce System Coordinator

Two roles are available at the facility level: User and Administrator

One you have been added to the role, eFINDS will appear in My Applications

### 

# Contacts & Logistical Training Information

## Instructors

#### {Instructor’s Name}

{Instructor title}

{Instructor address}

Phone:

Fax:

Email: [s](mailto:gps03@health.state.ny.us)

## Technical Support for your Organization

Name:

Phone:

Email:

## My HCS Coordinator(s)

To find your HCS Coordinator

1. Log into the HCS
2. Click My Account
3. Click Look up my coordinators

Name:

Email:

Name:

Email:

Name:

Email:

Name:

Email:

Name:

Email:

Name:

Email:

Name:

Email:

Name:

Email:

# Course Work for CTI-500

|  |  |
| --- | --- |
| Instructor Notes | |
| Introductory Slide  2 minutes | Take a moment to introduce yourself.  Say: Good {insert time of day} everyone! Thank you. Let me begin with a quick introduction: my name is {insert name and credentials}  Transition: I also want to provide you with some contact information for technical and non-technical eFINDS questions. |

## Chapter 1: Overview

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| --- | --- |
| Instructor Notes | |
| Technical Help  2 minutes | Say: On page five of your participant guide you will find contact information for technical and non-technical eFINDS questions.  The Health Commerce System trainers are the team responsible for providing technical assistance with eFINDS, so if you find that you are having a technical issue with eFINDS or the Health Commerce System in general you should contact the Health Commerce System Trainers at the number or email listed on page five.  Transition: Sometime however you will have questions that are non-technical and lean more towards operations and regulatory concerns. Those questions should be address to the NYSDOH Office of Health Systems Management Liaison to Public Health Emergency Preparedness |

### Technical Questions? Contact the Health Commerce System Trainers

Gregory P. Sweet

Learning Management Training Specialist, Synchronous Learning Expert

NYSDOH

800 North Pearl Street • Room 224

Albany NY 12204

Phone: 518-473-1809 (option 2)

Fax: 518-473-1615

Email: [hcsoutreach@health.state.ny.us](mailto:gps03@health.state.ny.us)

Valerie Shuba

Learning Management Training Specialist

NYSDOH

800 North Pearl Street • Room 224

Albany NY 12204

Phone: 518-473-1809 (option 2)

Fax: 518-473-1615

Email: [hcsoutreach@health.state.ny.us](mailto:gps03@health.state.ny.us)

|  |  |
| --- | --- |
| Instructor Notes | |
| Non-technical help  2 minutes | Dr. Debra Sottolano, whose contact information is also provided on page five of your guide.  Transition: So today I am going to show you how, but if you have questions about why or when your will need to contact Dr. Sottolano. |

### Non-technical Questions? Contact OHSM Liaison to Public Health Emergency Preparedness

Debra L. Sottolano, PhD, MBA

OHSM Liaison to Public Health Emergency Preparedness

Division of Standards and Surveillance

NYS Department of Health

875 Central Avenue

Albany, NY 12206-1388

Phone: 518-402-1004

Fax: 518-402-1010

Email: dls20@health.state.ny.us

|  |  |
| --- | --- |
| Instructor Notes | |
| Agenda  2 minutes | Say: And here is our agenda for today.  We will start with an overview of eFINDS including what eFINDS is, what evacuating facilities can do and are expected to do with eFINDS, what receiving facilities can and are expected to do, what goes into accessing eFINDS, including what roles grant access, and the differences in the access granted by each role; The importance of your person record and how to update it; What material you should have received from the NYSDOH and what to do if you do not have it, or did not receive it.  Then we will take a short break before we regroup and get started on the practical portion of the course.  During the hands on we will cover evacuating a single patient or resident; receiving a single patient or resident, searching eFINDS, how administrators can register multiple patients at one time through the web page; How to release a group of patients or residents from your facility; how to check in a group of patients or residents in one action; how administrators can create a fillable spreadsheet and how any user can upload the completed spreadsheet to register a group of patients or residents and we’ll finish up by looking at how to create a paper log you can use in the event there is no power or Internet access when you need to evacuate.  As we work through the practical exercises today, you will need to work with a partner, and we’ll make use of the “patients” at the back of your participant guide. If anyone does not yet have a partner please let me know during the break so we can get you set up for success.  Transition: Our goal is to have you leave today’s presentation feeling like a skilled operator of this new application. Let’s begin. |

|  |  |
| --- | --- |
| Instructor Notes | |
| eFINDS  3 minutes | Say: So what is eFINDS? eFINDS is a:   * Secure, real time & easy to use * common platform for sharing patient and resident location information * It Promotes data accuracy and saves Time * Allowing collaboration between facilities. * Used for incidents, events or practice exercises   This is a Governor’s initiative from lessons learned after Hurricane Sandy. Essentially, it is to be used for patient and resident location information, when facilities need to relocate their patients or residents. The application is designed to save time, and never get in the way of an evacuation. Facilities should always try to do a complete job of entering patient or resident data, but at the very minimum, you only need to place the barcoded wristbands on the patient or residents and send them to a safe location. Receiving locations can enter the patient information when the evacuated person arrives at safety.  The system is not an electronic medical record. eFINDS captures minimal amounts of data; just enough to track their patient’s and resident’s movement to other facilities.  This is the first version, and it is modeled it after the Department of Defense Joint Patient Tracking Application (JPaTs) used to track the global location of seriously wounded service members.  Transition: eFINDS is a commerce based-application and relies on Communications Directory role assignments to access the system. There are two roles that provide access for healthcare facility employees. |



What is eFINDS?

What does it do?

When is it used?

### Actions of an evacuating facility:

* Register patient/resident
* Update patient/resident
* Generate barcodes spreadsheets

### Actions of a receiving facility:

* Update patient/resident

#### Notes:

## Chapter 2: Role and Permissions

|  |  |
| --- | --- |
| Instructor Notes | |
| Facility’s Roles  5 minutes | Say: The eFINDS Data Reporter and the eFINDS Reporting Administrator roles grant access to the eFINDS application. Your HCS Coordinator, or facility administrator\* is responsible for making communications directory role assignments. You can find out who your coordinators are by clicking My Account on the HCS home page and then clicking look up my coordinators.  The eFINDS Data Reporter can register patients/residents in the system with or without a scanner, one at a time or multiples by using the eFINDS spreadsheet provided by the eFINDS Admin. They can also update with or without a scanner, one at a time or more than one.  Additionally the eFINDS Reporting can also generate the paper log (a PDF of used and unused barcodes), generate a spreadsheet that can be populated with patient/resident information and uploaded by eFINDS user, and register multiple patient/residents in a single click through the web interface. Because the Admin can do everything that a data reporter can, you only need to be added to one role; both roles are not needed and in fact, being assigned to both roles will give you an extra click in eFINDS as you will constantly have to tell eFINDS whether you want to act as a data reporter or an administrator each time you access the system. As usual a facility can of course have more than one person assigned to either role.  Transition: As eFINDS is a role-based tool, your person record is very important to your ability to access the system. Let’s take just a moment to review our role assignments and update our person records. |

#### What are the facility roles?

|  |  |
| --- | --- |
| List the role names and the tasks they can accomplish. | |
|  |  |
|  |  |

#### Notes:

|  |  |
| --- | --- |
| Instructor Notes | |
| Person records  10 minutes | Say: Turn to page eight of your participant guide, and open the Health Commerce System.  Assists with the URL https://commerce.health.state.ny.us  To verify your role assignment, go to the My Account link and click See what roles I hold. If you are not in an eFINDS and would like to be, then click on the Look up my coordinators. They are the ones who will add you to the role.  Point out the My Account link on the menu bar. Click into My Account.  Say: How many people here today have ever looked at, updated or verified their contact information on commerce?  Now, I will assume that you are participating in this training because you are either a facility administrator or in some kind of preparedness role. To be sure that you receive communications from your county health department or the state, please make sure your business and emergency contact information is correct. To do so, click on the Update or verify my contact information.  Click Update or verify my contact information.  Say: Your Person Record is your address book entry on the health commerce system. This is where you will find all of the contact information stored for each user and the sum total of the contact information the department will use to contact you should there be an emergency that will affect your facility, up to and including directing you to evacuate. So it is very important you keep this information up to date. When you look up other users in the Communications Directory you are actually looking up their person records.  Because this is the information that will be used to contact you during emergencies, the DOH recommends that you only include telephone number that will be answered by you in your emergency contact information. If you include numbers like the “front desk” there is a very good possibility that someone else will confirm receiving a notification for you – you show up on the report having confirmed receiving a message and you may not know a message was ever sent.  Transition: Let’s move on and talk about what materials you should have already received to work with eFINDS. |

## Verify your role assignments and update your person record

### Verify Role Assignments

1.       Log into the Health Commerce System: <https://commerce.health.state.ny.us>

2.       Click My Account

3.       Click “See what roles I hold”

If you see that you are assigned to an eFINDS role you are all set. If you see that you are not assigned to an eFINDS role click Look up my coordinators to find out who to contact to be assigned to a role. You MUST be assigned to an eFINDS role to complete the practical exercises.

### Update your Person Record

1.       Log into the Health Commerce System: <https://commerce.health.state.ny.us>

2.       Click My Account

3.       Click Update or verify my contact information.

Ensure that all of your contact information is up to date. Be sure to review both Business Contact Information and Emergency Contact Information. If you need to make changes, enter the changes and click submit.

Note: You are strongly encouraged to only include telephone numbers that you will personally answer in your Emergency Contact information.

#### Notes:

|  |  |
| --- | --- |
| Instructor Notes | |
| What’s in the box?  5 minutes | Say: Each facility will receive a number of wristbands, based on the licensed beds, and the corresponding paper log sheets. The barcodes provided will have a special sequence number used solely for your facility to allow for better patient and resident relocation management. Each wristband will contain the facility name, a barcode, and the barcode number.  The number of wristbands you receive is based on the number of licensed beds your facility has, not on any current census.  The barcodes on the wristband have a prefix that corresponds to the type of facility HO for hospital, NH for nursing home, ACF for adult care facility  Facilities will also be receiving a small set of training bands. You will clearly know that they are for training, because they are marked for training in two places, and the barcode number ends in a D for demo. Training wristbands can only be used in the eFINDS Demo application and the production bands are only recognized in the production eFINDS. The bands cannot be used in the wrong application by mistake.  If you brought training wristbands with you today, that’s great and you can look forward to using them in the exercises, but the training bands are not required. And this is an important point to keep in mind, the barcodes and wristbands are not the same thing. You do not need a wristband to use a barcode. Of course it is much easier to process patients in eFINDS when they are wearing the wristbands, but it is not at all necessary to use the system.  Each facility is also receiving one bar code scanner programmed to work with the eFINDS application. The budget only provides for one scanner per facility, and you are free to purchase more scanners on your own. The model guaranteed to work with eFINDS is the Honeywell XENON 1900. And that doesn’t mean any scanner you may already own will not work. You will have to plug it in and try it.  You will also get one copy of your paper log you can fall back to if you do not have power or Internet, and one of our exercises will go over how to create more copies.  Page nine of your guide provides a worksheet you can use to verify you have all your materials accounted for. If you come up with anything missing, contact the HCS at hcsoutreach@health.state.ny.us.  Transition: Whew! Lots of info so far. Let’s take 10 minutes to regroup, and come back fresh, because up next we’re diving into eFINDS! |

## eFINDS Materials or What’s in the box?

Verify your facility has received its scanner and make note of its color, serial no. and location at your facility.

We have received our scanner and it is white / black. Its serial no. is:

And it is located .

Verify that your facility has received wristbands. Note their beginning and ending barcode numbers, and describe their location within your facility.

We have received our eFINDS wrist bands. Our barcode numbers begin at

and end at and are located .

Our training wristbands start with number and end at number .

|  |  |
| --- | --- |
| Instructor Notes | |
| Set Up Patients  5 minutes | Please turn to page nine of your participant guide so we can begin our practical demonstrations and exercises. I am going to take your through the typical tasks users are expected to perform in eFINDS. I’ll start by giving you a demonstration of how to complete the task and then you will have an opportunity to practice the task.  At the back of your guide you will find some paper “patients” you can use to practice the tasks. Go ahead and separate the “patients” from your guide and give them names and dates of birth if you wish – we’ll see in a moment that date of birth is not required.  If you did not bring training wrist bands with your today, that’s OK. You can use your paper log.  I’ll give everyone a few minutes to get set up and then we will move on with our first exercise.  While the students are setting up their patients, open and sign into the HCS. |

## Chapter 3: Training Exercises

Your facility plans to evacuate, wristbands have been received from NYSDOH. You will work with your assigned partner to complete these exercises. All participants will complete these exercises, switching between evacuating and receiving facility as necessary.

1. Remove the paper “patient” from the back of this guide.
2. Give your “patient” a name and date of birth.
3. You may also decorate your patient to make it unique.

|  |  |
| --- | --- |
| Instructor Notes | |
| Register a single patient.  10 minutes | Say: First, things first. As we are about to do training exercises it is important to make sure that we are in the eFINDS DEMO system, in fact, as we found out just a few minutes ago our training barcodes, the ones that end in D, willnot work in the regular eFINDS system. So we have to open DEMO. To open DEMO we go to the applications list, click e and then scroll down until we find eFINDS DEMO. There is no link to the DEMO system in the My Applications panel to prevent users from opening the wrong system in the event of a real emergency.  Our first exercise is to register a single patient into eFINDS. In this case, we will assume that we have sufficient lead time to place wristbands on the patients and scan them into eFINDS for registration. Again if you do not have wrist bands with your today, work from your paper log.   1. Select your current location form the dropdown list 2. Click Submit 3. Scan a barcode OR click Register Patient/Resident > With Scanner. Alternate you can type the barcode number into the field. 4. Confirm message: Barcode is located. You can register a new Patient/Resident with it. 5. Enter first name, last name, date of birth (mm/dd/yyyy), gender, etc. 6. Verify the Evacuation Operation. 7. Verify the patient/resident current location is correct. 8. Select the Intended Destination Organization type, if necessary. 9. Select the Intended Destination; this is your partner’s organization. 10. Enter the Bulk Group; such as bus no. or transportation description. 11. Click Register. If the required fields are not complete, you will receive an error message. Click Override to bypass the error. 12. Confirm message: Patient/Resident info is updated.   Repeat Steps 5-14 for each person being evacuated.  It is as simple as that. Evacuating facilities may not have time to complete the registration process, so multiple time saving options are available |

### Training exercise 1

Demonstrates an evacuating facility would register patient/resident with barcoded wristband:

#### Notes:

#### Hands-On Practice

1.       Open eFINDS Demo

2.       Log into the HCS

3.       Click Applications

4.       Click E

Scroll down to find and click Evacuation of Facilities in Disaster System Demo – At the time of writing this was the last item in the list of applications starting with ‘E’.

#### Register a Single patient or resident

1.       Select your current location form the dropdown list

2.       Click Submit

3.       Scan a barcode OR click Register Patient/Resident > With Scanner. Alternate you can type the barcode number into the field.

4.       Confirm message: Barcode is located. You can register a new Patient/Resident with it.

5.       Enter first name, last name, date of birth (mm/dd/yyyy), gender, etc.

6.       Verify the Evacuation Operation.

7.       Verify the patient/resident current location is correct.

8.       Select the Intended Destination Organization type, if necessary.

9.       Select the Intended Destination; this is your partner’s organization.

10.    Enter the Bulk Group; such as bus no. or transportation description.

11.    Click Register. If the required fields are not complete, you will receive an error message. Click Override to bypass the error.

12.    Confirm message: Patient/Resident info is updated.

|  |  |
| --- | --- |
| Instructor Notes | |
| Receiver updates with band  10 minutes | Say: Now we are the receiving facility. A patient has just arrived from an evacuating facility. All patients/residents have barcoded wristbands, and need to be checked in. remember if you have the scanner you can use it – it will be faster, but you can always type the numbers in as well.   1. Click Update Patient/Resident > With Scanner 2. Scan a barcode and click Submit, if necessary. 3. Enter or confirm information, including Evacuation Operation and the current patient/resident location. 4. Click Update, or Override. 5. Confirm message: Patient/Resident info is updated.   And that’s it/ Receiving a patient in eFINDS is nothing more than updating the current location to your facility.  As a quick side note, if you are using the mobile app version of eFINDS, you are limited to dealing with patients or residents one at a time as we just did. |

### Training exercise 2

Demonstrates how a receiving facility updates patient/resident location information by scanning the wristbands.

#### Notes:

#### Hands-On Practice

1. Pass your patient to your partner. You will now be the receiving facility and receive each other’s “patient”.
2. Click Update Patient/Resident > With Scanner
3. Scan a barcode and click Submit, if necessary.
4. Confirm message: Barcode is located. Patient/Resident is found. You can update the information.
5. Enter or confirm information, including Evacuation Operation and the current patient/resident location.
6. Click Update, or Override.
7. Confirm message: Patient/Resident info is updated

|  |  |
| --- | --- |
| Instructor Notes | |
| Quick Search  5 minutes | Say: You can use the Quick Search find and Update information. You can search by name or bay barcode. You would search by name if you were looking for the current location of a patient or resident you evacuated or if your receive someone and the person is not wearing a wristband, or otherwise has a visible barcode. Note that there is some privacy built in and if a person was never at your facility, or intended to come to your facility, you will not be able to find them in eFINDS.  Let’s update Updating a record would be to add more information or change info. such as correct spelling, DOB, location, notes, etc. Let find the person who needs to be updated.   1. Click Home on the eFINDS menu bar. 2. Scan a barcode, enter a barcode number, OR enter first or last name in Quick Search (located top right).If necessary click Quick Search. 3. Locate the correct patient/resident record. 4. Click the Barcode (Serial ID) link. 5. Verify: Patient/Resident is found. You can update the information. 6. View, Add, or change the necessary information. 7. Click Update Patient/Resident.   Note: the Patient/Resident Tracking History has been updated |

### Training exercise 3

Demonstrates how an evacuating facility can use the mobile application to register a patient.

#### Notes:

|  |  |
| --- | --- |
| Instructor Notes | |
| Evac reg multiples  10 minutes | Say: Continuing our evacuation, we are running short on time. The administrator, to save time, is going to register our patients en masse through the web interface.  If you have administrator permission, then:   1. Click Register Patient/Resident > Multi Patient/Resident Input. 2. Change Evacuation Operation and verify Current Location. 3. Select Intended Destination. 4. Enter the number of barcodes to be assigned. 5. Click Generate Fillable Spreadsheet. 6. Enter known information, such as first name, last name, date of birth (mm/dd/yyyy), and gender. 7. Click Save all Patient/Resident. 8. Verify message: Successfully saved {correct # being evacuated} Patient/Resident and click barcode to view or update the patient or resident information. |

### Training exercise 4

Demonstrates how administrators can register multiple patients through the web interface.

#### Notes:

#### Hands-On Practice

Complete the following if you have administrator access:

1. Use two more of your paper patients (give them names, etc.)
2. Click Register Patient/Resident > Multi Patient/Resident Input.
3. Change Evacuation Operation and verify Current Location.
4. Select Intended Destination (your partner).
5. Enter the number of barcodes to be assigned.
6. Click Generate Fillable Spreadsheet.
7. Enter known information, such as first name, last name, date of birth (mm/dd/yyyy), and gender for each of your patients.
8. Click Save all Patient/Resident.
9. Verify message: Successfully saved {correct # being evacuated} Patient/Resident and click barcode to view or update the patient or resident information.

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| Instructor Notes | |
| Release a group of patients  10 minutes | 1. Click Update Patient/Resident > Multi Patient/Resident Update. 2. Verify your location. 3. Select the Action Type: Releasing Patient/Resident From this Location, OR Change Operation for Patient/Resident at this Location. 4. Select the Intended Destination. 5. Enter the Bulk Group, for example transport via bus. 6. Click Load All Patient/Resident. 7. Select All OR select Update for each patient/resident. 8. Click Release Selected Patient/Residents OR Change Operation for Selected Patient/Resident. 9. Verify successfully updated {#} Patient/Resident.   You can use this same procedure to change the Operation for a group of patients or residents. |

### Training exercise 5

Demonstrates how to release a group of patients or residents from the evacuating facility.

#### Notes:

#### Hands-On Practice

1. Click Update Patient/Resident > Multi Patient/Resident Update.
2. Verify your location.
3. Select the Action Type: Releasing Patient/Resident From this Location..
4. Select the Intended Destination.
5. Enter the Bulk Group, for example transport via bus.
6. Click Load All Patient/Resident.
7. Select the two patients you just entered.
8. Click Release Selected Patient/Residents OR Change Operation for Selected Patient/Resident.
9. Verify successfully updated {#} Patient/Resident

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| Instructor Notes | |
| Receive a group of patients  10 minutes | Say: We are now the receiving facility again and now we want to receive the group of patients that were just release from our partner facility.   1. Click Admin from the menu bar 2. Click My location 3. Select location 4. Click Submit 5. Click Update Patient/Resident > Multi Patient/Resident Update. 6. Verify your location. 7. Select Checking in Patients/Residents into this location. 8. Verify the patient or resident is correct. 9. Click Select All OR Update for each patient or resident being received. 10. Click Check in Selected Patient/Resident. 11. Confirm Message: Successfully updated {correct #} of Patient/Resident. |

### Training exercise 6

Demonstrates how to receive a group of patients or residents.

#### Notes:

#### Hands-On Practice

1. Pass the two patients you just released to your partner. Receive the two patients your partner just handed to you.
2. Click Admin from the menu bar
3. Click My location
4. Select location
5. Click Submit
6. Click Update Patient/Resident > Multi Patient/Resident Update.
7. Verify your location.
8. Select Checking in Patients/Residents into this location.
9. Verify the patient or resident is correct.
10. Click Select All OR Update for each patient or resident being received.
11. Click Check in Selected Patient/Resident.
12. Confirm Message: Successfully updated {correct #} of Patient/Resident.

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| Instructor Notes | |
| Generate a fillable spreadsheet for upload  10 minutes | So now we have successfully evacuated and received three patients, but we have two more that we need to take care of. In the next exercise, the administrator will create a fillable spreadsheet that can be filled out offline and then uploaded to eFINDS to register patients or residents en masse. This can be useful if you have a stable population and want to maintain the spreadsheet off line to be ready if and when an evacuation is called for, or to allow clerical, non-commerce users to enter the patient data electronically and then pass that data to eFINDS.  First, the admin will need to provide the user role with a spreadsheet of barcodes   1. Click Manage Barcodes > Generate Barcodes Spreadsheet. 2. Select or verify the current location. 3. Enter Start and End barcode numbers, or leave it blank for a list of all available barcodes. 4. Select EXCEL for the upload patient/resident option. 5. Click Generate. 6. Save the Excel spreadsheet to your computer.   The spreadsheet can be opened Microsoft Excel or Open Office and can be transmitted electronically around your facility. Do not change the file name however as the filename designates the spreadsheet as a valid, uploadable file. If you change the file name the file upload will fail.  OK. Now I am the user who received the Excel file   1. Open the spreadsheet from your desktop 2. Enable editing 3. Register your last two patients. At this point you should be familiar with the override feature if you haven’t given the last two “patients” complete information. 4. Click Save. |

### Training exercise 7

Demonstrates how to release a group of patients or residents from the evacuating facility.

#### Notes:

#### Hands-On Practice

Create the spreadsheet

1. Click Manage Barcodes > Generate Barcodes Spreadsheet…

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| Instructor Notes | |
| Upload the fillable spreadsheet  10 minutes | Now we need to upload the file to eFINDS, and while it take and administrator to create the file any eFINDS user – administrator or data reporter – can upload the file.   1. Return to eFINDS 2. Select or verify location 3. Click Register Patient/Resident from the main menu bar 4. Select Patient/Resident File upload 5. Verify Evacuation Operation and current location 6. Click Browse button 7. Locate Excel file with saved patient/resident information (nys\_eFINDS file name with facility id, date and time) Note: PDF files cannot be upload but could be faxed in. 8. Click Open to add file 9. Click Upload button 10. Verify Patient/Resident Info is updated below 11. Edit information if needed 12. Click Save All Patients/Residents   Did anyone notice the very important piece that does not get taken care of in the file upload? Right the Intended destination doesn’t get set. So as a bonus use the multi-update to set the Intended destination. |

### Training exercise 8

Demonstrates how to upload the fillable spreadsheet to eFINDS.

#### Notes:

#### Hands-On Practice

1. Return to eFINDS
2. Select or verify location
3. Click Register Patient/Resident from the main menu bar…

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| Instructor Notes | |
| Generate a paper log PDF  7 minutes | Say: eFINDS provides you with a paper log you can use to fall back on if your do not have power or Internet to track your patients. You get one copy of the paper log with your kit from NYSDOH, which can be useful just to see what your barcode numbers are, but let’s take a moment and see how we can create additional copies of the paper log.   1. Click Manage Barcodes > Generate Barcodes Spreadsheet. 2. Select or verify the current location. 3. Enter Start and End barcode numbers, e.g., 4—13 for ten patient/residents to be relocated. 4. Select the PDF if you want a scannable barcode log OR select EXCEL for the upload patient/resident option. 5. Click Generate. 6. Print the PDF OR save the Excel spreadsheet to your computer. 7. Note: PDF files cannot be uploaded, but could be sent with transport. The Excel file can be updated with patient/resident information   Note that if a barcode number has been used it is noted on the paper log, but the person’s information is protected. |

### Training exercise 9

Demonstrates how to create the paper log.

#### Notes:

#### Hands-On Practice

1. Click Manage Barcodes > Generate Barcodes Spreadsheet.
2. Select or verify the current location.
3. Enter Start and End barcode numbers, e.g., 4—13 for ten patient/residents to be relocated.
4. Select the PDF if you want a scannable barcode log OR select EXCEL for the upload patient/resident option.
5. Click Generate.
6. Print the PDF OR save the Excel spreadsheet to your computer.
7. Note: PDF files cannot be uploaded, but could be sent with transport. The Excel file can be updated with patient/resident information

This exercise is just to practice creating the log. You will not use the log in any later exercises.

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| Instructor Notes | |
| Redirect a patient to another facility.  5 minutes | Say: Patient records may be updated as many times as needed. So image you were told that all were going to one intended destination, but now one of the people you just registered is being sent to another place. We are going to update record by continuing from the previous exercise.   1. Click Update Patient/Resident > With Scanner 2. Scan a barcode and click Submit, if necessary. 3. Change the patient or resident’s intended destination. 4. Click Register, Update, or Override. 5. Confirm message: Patient/Resident info is updated. |

### Training exercise 10

Demonstrates how to re-direct the patient to a third facility.

#### Notes:

#### Hands-On Practice

1. Click Update Patient/Resident > With Scanner
2. Scan a barcode and click Submit, if necessary.
3. Change the patient or resident’s intended destination.
4. Click Register, Update, or Override.
5. Confirm message: Patient/Resident info is updated.

### Review Questions (10 minutes)

1. **True** or False: If I have technical questions about eFINDS I will contact The Health Commerce System Trainers.
2. True or **False**: eFINDS includes a complete medical history for each person tracked in the system.
3. True or **False:** Extended lead times are required for eFINDS because it significantly increases the amount of time required for an evacuation.
4. **True** or False: I can verify my role assignments and contact information using the HCS My Account features.
5. **True** or False: eFINDS Data Reporter and eFINDS Reporting Administrator are the only two healthcare facility roles that can access eFINDS.
6. Trueor **False**: The eFINDS Reporting Administrator can assign others to the eFINDS Data Reporter role.
7. True or **False:** HCS Coordinators have access to eFINDS.
8. True or **False**: Each eFINDS users at my facility will receive a barcode scanner form NYSDOH.
9. **True** or False: The number of wristbands I receive will be equal to the number of beds my facility is licensed to operate.
10. **True** or False: Training wristbands are distinctive in that the word training is printed on the band, and the barcode number ends with the letter ‘D’.
11. True or **False**: An official NYSDOH barcode scanner is required to use eFINDS.
12. True or **False**: Official NYSDOH pre-printed wristbands are required to use eFINDS.
13. True or **False**: The eFINDS Data Reporter can register multiple patient/resident without barcoded wristbands or a barcode sheet.
14. **True** or False: The operation is the official name given to the reason to evacuate.
15. **True** or False: The operation is the minimum amount of data required to register a patient or resident.
16. True or **False:** Quick Search allows me to find anyone who has been registered into eFINDS.
17. **True** or False: You must manually enter the Intended Destination on line after uploading a fillable spreadsheet.
18. True or **False**: I can change the name of the fillable spreadsheet to meet my needs.
19. **True** or False: Only the eFINDS Reporting Administrator can create the fillable spreadsheet.
20. **True** or False: Any eFINDS user can upload the fillable spreadsheet.

# Answer Key

1T 2F 3F 4T 5T 6F 7F 8F 9T 10T 11F 12F 13F 14T 15T 16F 17T 18F 19T 20T



Patient Name:

Date of Birth:

Barcode No.: