j0397102

eFINDS Training

Participant Guide

Commerce Training Institute

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# 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

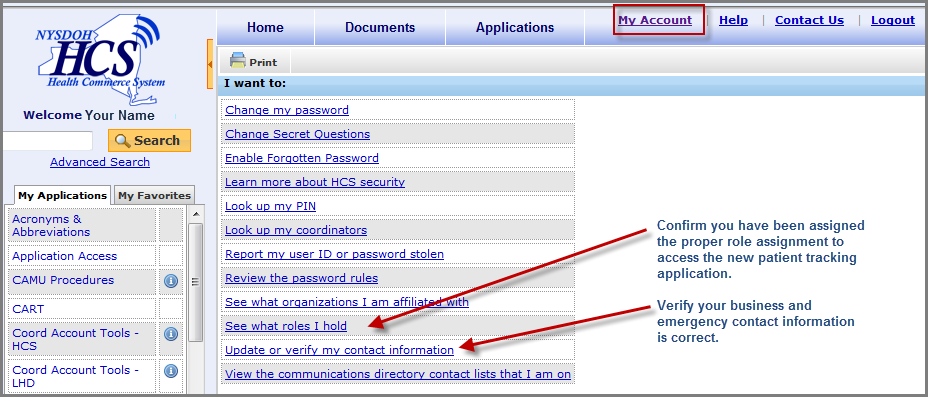
* Updated patient/resident with wristbands.
* Updated patient/resident without wristbands or barcodes.

# 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:

E-mail:

## My HCS Coordinator(s)

1. To find your HCS Coordinator
2. Log into the HCS
3. Click My Account
4. Click Look up my coordinators

Name:

E-mail:

Name:

E-mail:

Name:

E-mail

Name:

E-mail:

## My Partner for today’s class

Name:

Facility Name:

# Course Work for CTI-500

## Chapter 1: Overview

### 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)

### 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



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

What are the facility roles?

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

#### Notes:

## 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:

## 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 .

If any of your materials are missing contact hcsoutreach@health.state.ny.us.

## 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 betwee 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.

### 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.

Be sure to write the barcode, or stick the wristband on the paper “patient”.

### 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. Enter or confirm information, including Evacuation Operation and the current patient/resident location.
5. Click Update, or Override.
6. Confirm message: Patient/Resident info is updated

### Training Exercise 3

Demonstrates using the quick search.

#### Notes:

#### Hands-On Practice

None specifically for this demonstration.

### 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.

### 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 enetered.
8. Click Release Selected Patient/Residents OR Change Operation for Selected Patient/Resident.
9. Verify successfully updated {#} 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 hands 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.

### Training Exercise 7

Demonstrates how to create the fillable spreadsheet.

#### Notes:

#### Hands-On Practice

Create the spreadsheet

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.

Fill in the spreadsheet

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 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
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

### 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.

### Training Exercise 10

Demonstrates how to re-direct the patient to another 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

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. True or 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.:



Patient Name:

Date of Birth:

Barcode No.:



Patient Name:

Date of Birth:

Barcode No.:



Patient Name:

Date of Birth:

Barcode No.:



Patient Name:

Date of Birth:

Barcode No.:

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