Account Manager Training

Texas EMS/Trauma Registry

Administration Application

1. Search for a User
2. Edit Existing User Information
3. Reset Password
4. Create a New User
5. Adding a User to Your Entity
6. Removing a User from Your Entity

Administration Application

Texas EMS/Trauma Reporting System

- Enter your Login Name and Password.
- To access the Administration Application, select Administration (instead of Main) from the Application drop-down menu.

Texas EMS/Trauma Reporting System Terms and Conditions of Use.
If you do not agree to be bound by the terms and conditions, promptly exit this application.

This System and related services are provided subject to your compliance with the terms and conditions set forth below. Please read the following information carefully. If you do not agree to be bound by the terms and conditions, promptly exit this application.

This AGREEMENT is entered into by and between the State of Texas, Department of State Health Services ("DSHS") and you, the "User" of the Department's Trauma Registry System

Login

Login Name:

Password:

Application: Administration

Login

Reset your password

Administration Application

Texas EMS/Trauma Reporting System

System Information | User Administration | Configuration

Summary

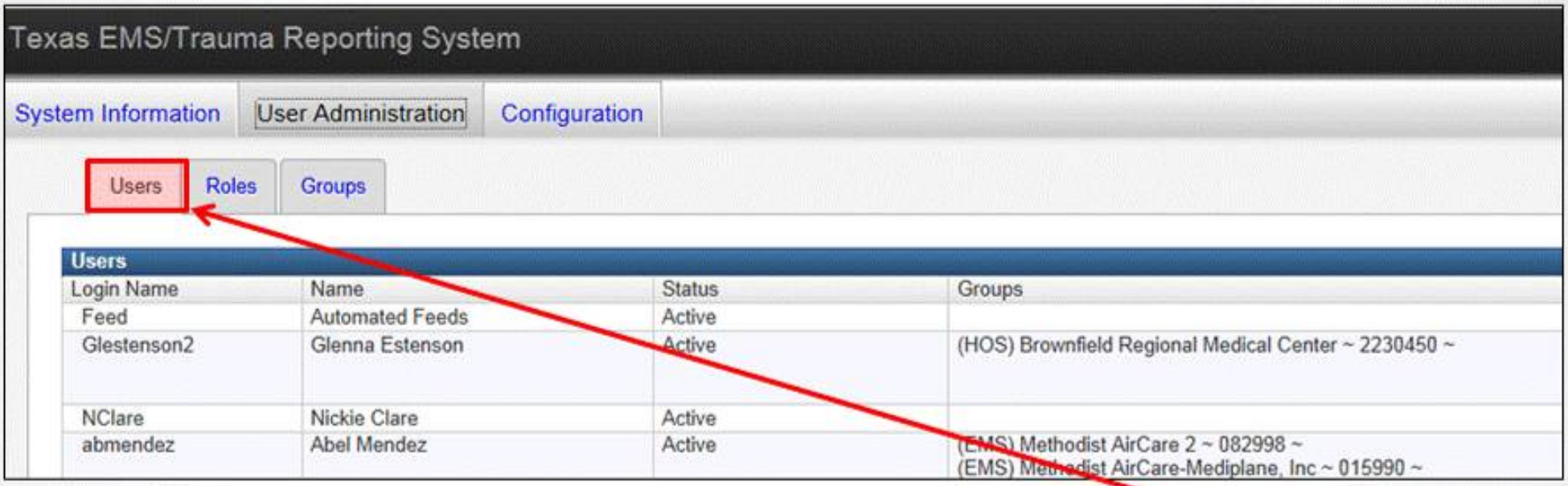
Summary	
Category	Details
Maven Information	Maven 5.0.2.201307290846-TRUNK Licensed to Consilience Software Internal Development Use (non-production) (8000 users) License expires 12/31/2030
Server	txtrisvm01 (10.0.2.115) [2 CPUs] Windows Server 2008 R2 6.1 amd64
Database	Operational Database: Oracle Reporting Database: None Connection Pool: JNDI

- Select User Administration.
- Account Managers will be able to view all users, regardless of entity.

Search for a User

...

Search for a User



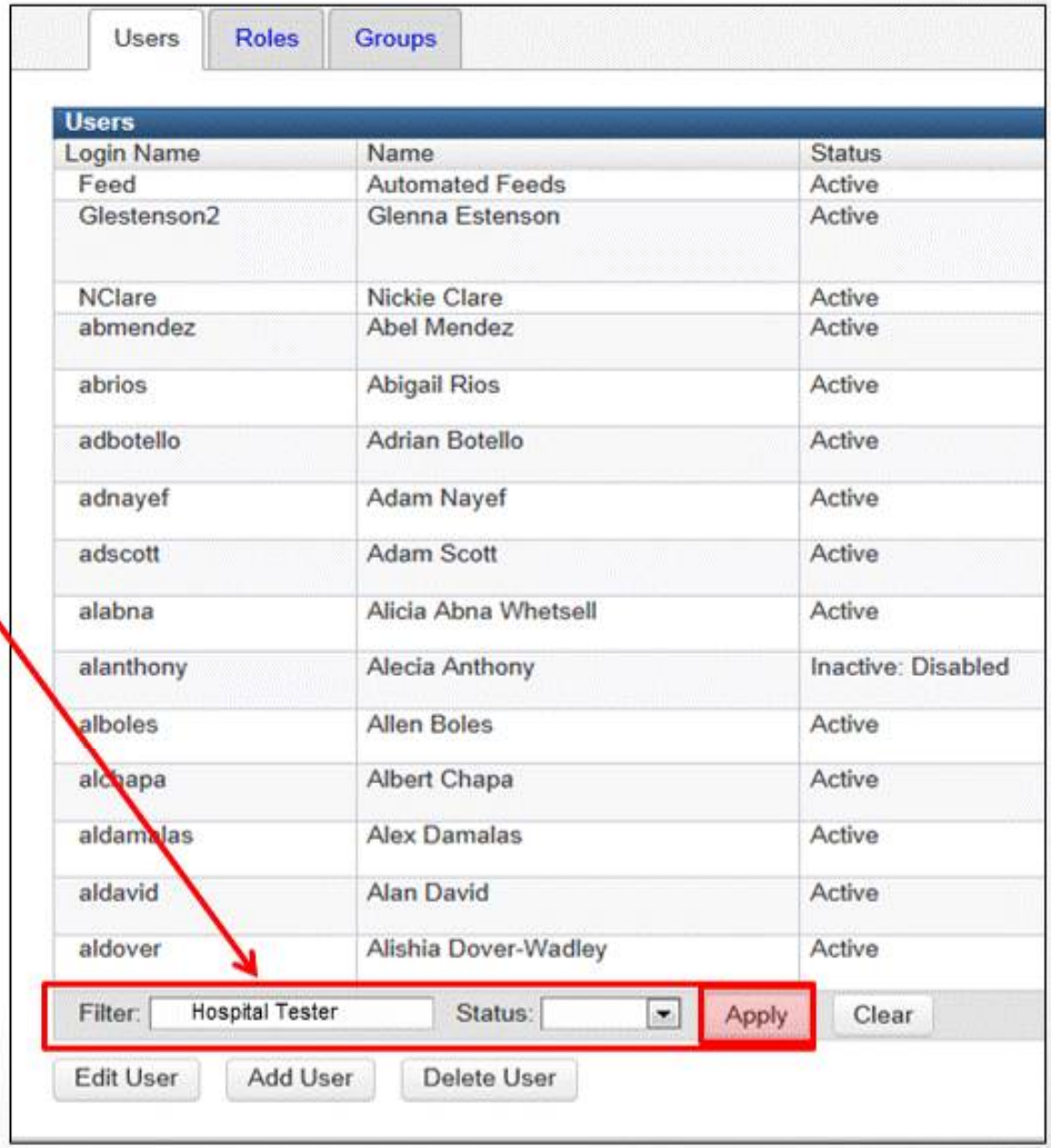
- User's account information is accessible under the Users link
- **Account Managers will be able to view <u>all</u> users, regardless of entity**
- Even though Account Managers are able to view all users, they may only edit users belonging to their entity

Search for a User

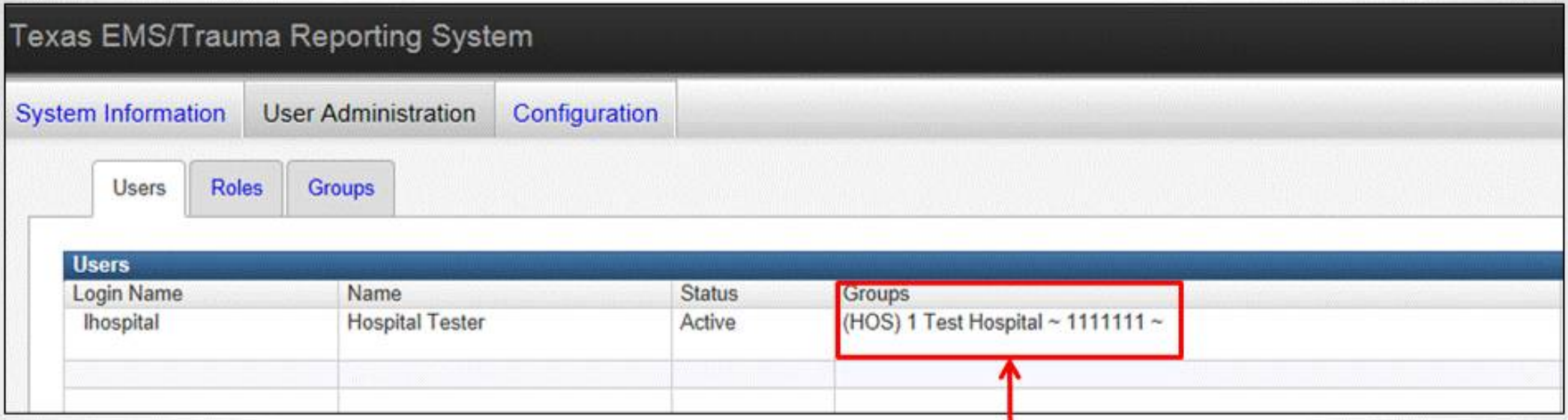
Enter the user's name* (partial or complete) in the "Filter" field

Select "Apply"

**You may also search by login name (username)*



Search for a User



- Users matching filter criteria will display
- The entity name is displayed in the GROUPS column
  - *(1 Test Hospital)*
- Each entity (e.g. hospital, EMS agency, RAC, third-party agency) has its own "group"

Editing Existing User Information

Edit Existing User Information

Users

Login Name	Name	Status	Groups
lhospital	Hospital Tester	Active	(HOS) 1 Test Hospital ~ 1111111 ~

Search for the user you wish to edit by entering the user's name in the Filter field and select Apply.

Filter: hospital tester Status: Apply Clear

Edit User Add User Delete User

Select row with user's information *(row will be yellow)*.

Select "Edit User" button.

Edit Existing User Information

Login Credentials

Login Name: morayner

Password:

Confirm Password:

Enforce Password Expiration: ☑

On the Edit User screen you can reset a password or enter Contact Information for the user.

Security Answer:

Confirm Security Answer:

Contact Information

First Name: Molly

Last Name: Rayner

Middle Name:

Title:

Gender:

Email:

Secondary Email:

Supervisor:

Please ensure that you include the user's Email address and at least one Phone Number.

Zip Code:

Home Phone:

Work Phone:

Mobile Phone:

Pager:

Fax:

Notes:

Reset Password

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Reset Password

Login Credentials

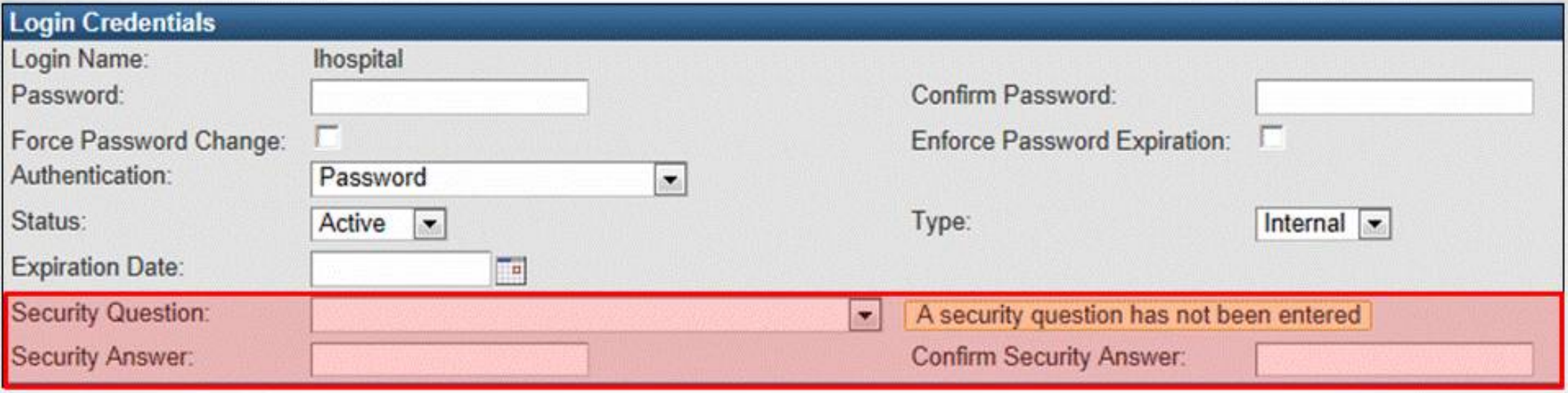
Login Name:	lhospital		
Password:		Confirm Password:	1
Force Password Change:	2	Enforce Password Expiration:	
Authentication:	Password		
Status:	Active 3	Type:	Internal
Expiration Date:			
Security Question:		A security question has not been entered	
Security Answer:		Confirm Security Answer:	

1. **New password fields**
   a. Password – enter a new temporary password
   b. Confirm Password – retype new temporary password for verification

2. **"Force Password Change" checkbox**
   a. Ensure box is checked
   b. The user will reset the password the next time he/she logs in

3. **Status drop-down menu**
   a. Ensure Status drop-down menu is set to "Active"
   b. The user will not be able to login unless the status is set to Active

Security Question/Answer



- If you see the message "A security question has not been entered," ask your user to set up their security question using Edit Profile on the Main side of the application. (Instructions for this are in the Basic Training).
- By setting up a security question, this will allow the user to use the Reset Password option located on the Login page.

Create a New User

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Create a New User

Texas EMS/Trauma Reporting System

System Information | User Administration | Configuration

Users | Roles | Groups

Users

Login Name	Name	Status	Groups

Filter: Status: Apply Clear

Edit User | Add User | Delete User

Navigate to the Users link under the User Administration tab

Select "Add User" button

Create a New User

1. Login Name
   a. Format – first two initials of first name and full last name
   b. Must be entered in all lowercase letters
   - Example – Registry Tester = **retester**
2. Password
   a. 8-14 characters in length
   b. One number
   c. One symbol
3. Force Password Change
   a. Select checkbox
   b. Will force user to reset password next time user logs in

Create a New User

- You must include a First and Last Name.

Contact Information

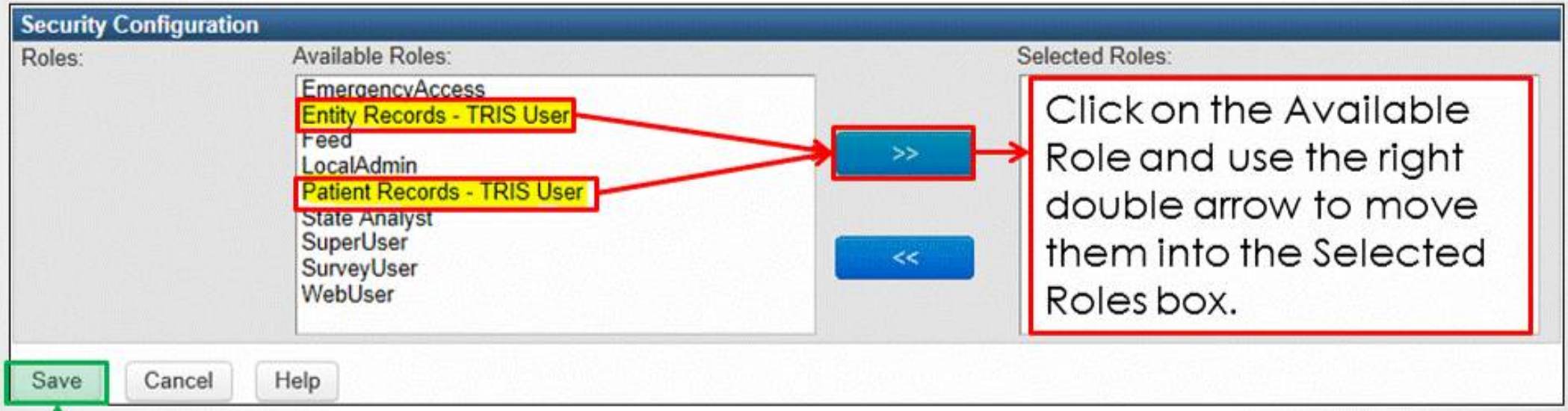
First Name:	Molly	Last Name:	Rayner
Middle Name:			
Title:		Gender:	
Email:		Secondary Email:	
Supervisor:			
Time Zone:			
Street 1:			
Street 2:			
City:		State:	TX
Zip Code:			
Home Phone:		Work Phone:	
Mobile Phone:		Pager:	
Fax:			
Notes:			

- Fill in as much Contact Information as you can, including an Email address and at least one direct Phone Number.

Create a New User

Each user must be assigned two roles:

- Entity Records – TRIS User
- Patient Records – TRIS User



Select the "Save" button when complete.

Provide the user with the Login Name and Temporary Password.

Adding a User to Your Entity

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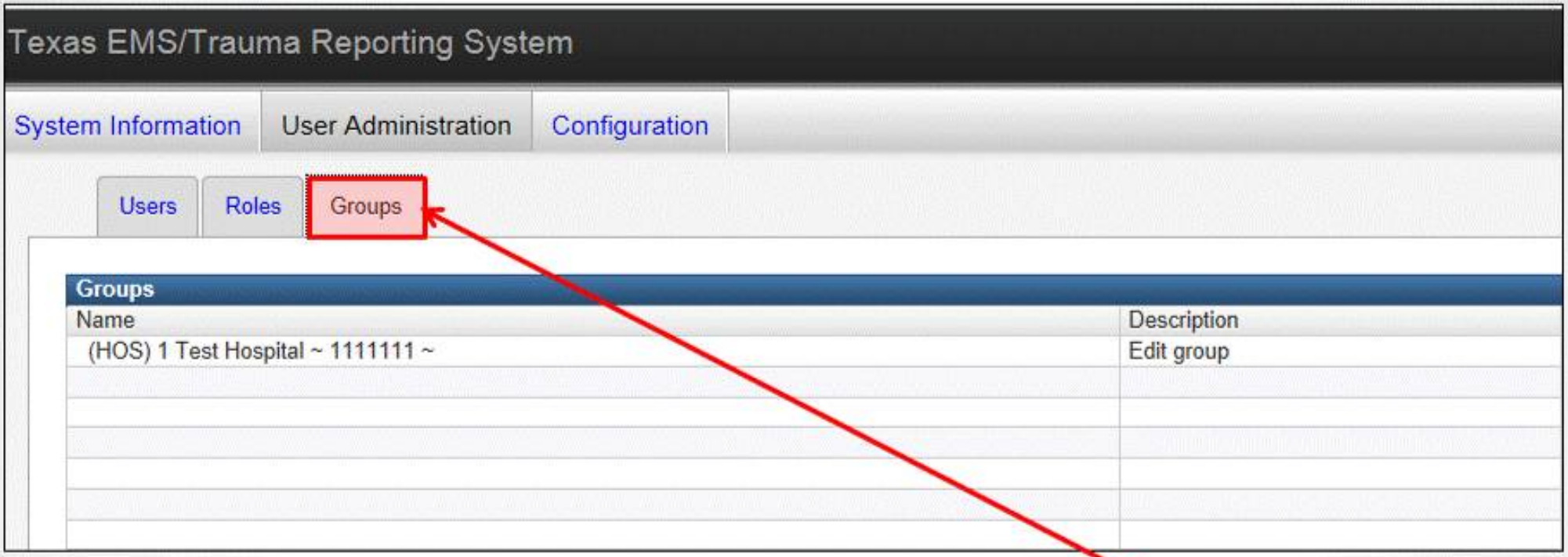
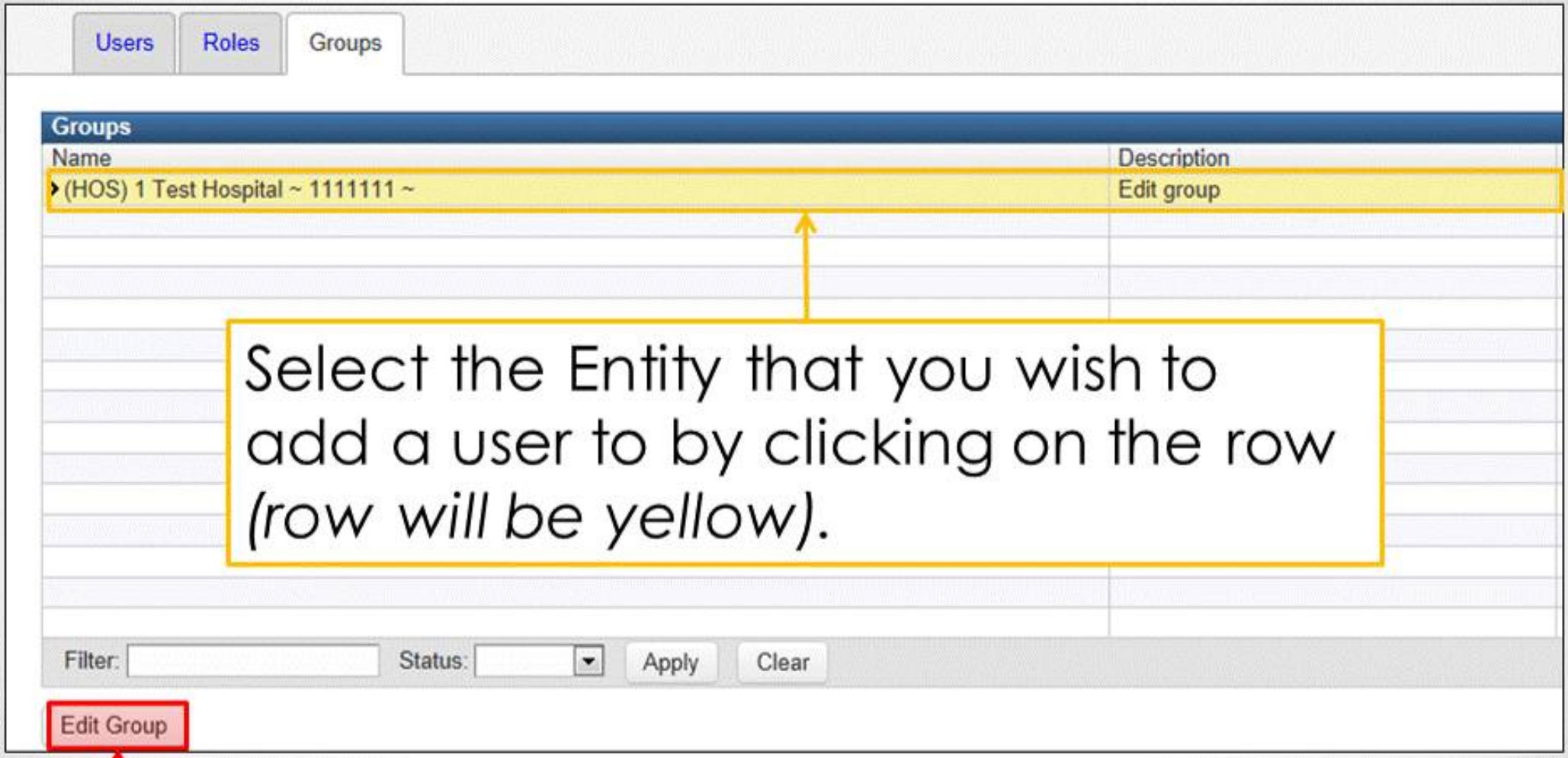
Select Entity (Groups)



- Under User Administration, select the Groups tab.
- All entities that you are the Account Manager for will automatically display here.

Select Entity (Groups)



Select the Entity that you wish to add a user to by clicking on the row *(row will be yellow)*.

Select the "Edit Group" button.

Add User as Group Member

Group Definition

Name: (HOS) 1 Test Hospital ~ 1111111 ~

Description: Edit group

Group Members

User Mapping:

Available Users:

Abel Mendez [abmendez]
Abigail Rios [abrios]
Adam Nayef [adnayef]
Adam Scott [adscott]
Adrian Botello [adbotello]
Alan David [aldavid]
Albert Chapa [alchapa]
Alecia Anthony [alanthony]
Alejandro Perez [alperez]
Alex Damalas [aldamalas]
Alex Ramos [alramos]
Alice Priddy [alpriddy]
Alicia Abna Whetsell [alabna]
Alicia Whitt [alwhitt]
Alishia Dover-Wadley [aldover]

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Group Members:

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Group Admins:

Hospital Tester [lhospital]
Molly Rayner [morayner]

Save Cancel Help

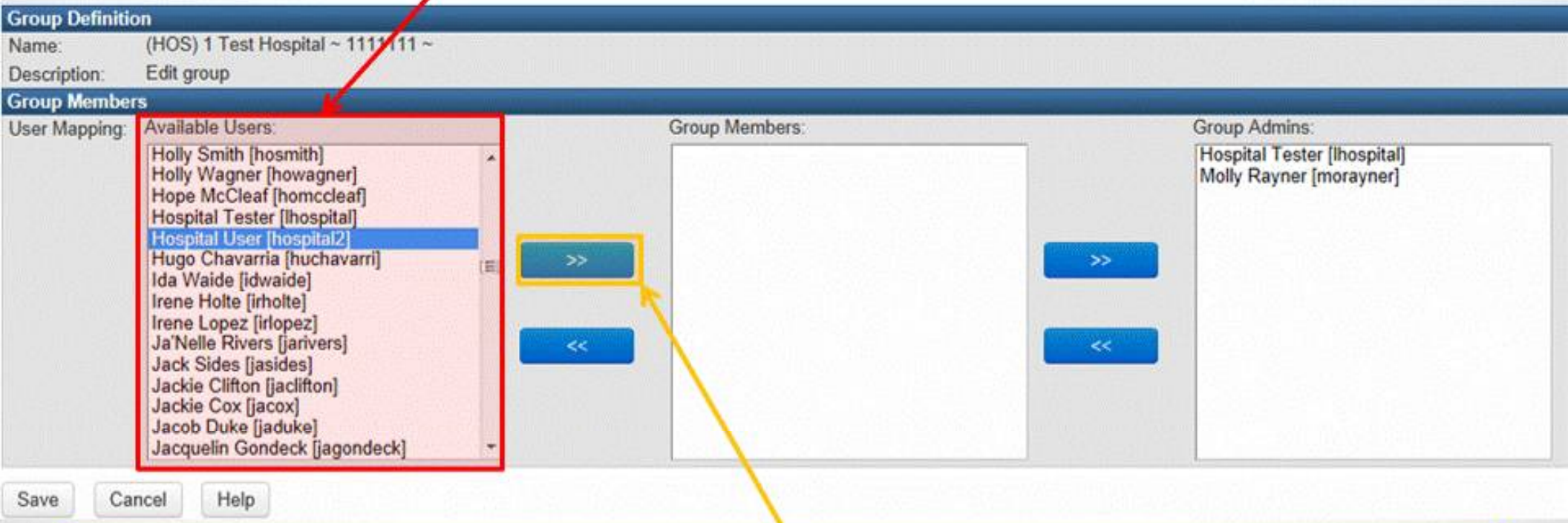
Available Users – lists all users in the system (not just your entity users.

Group Members – lists users that have access to your entity that are not Account Managers.

Group Admins – lists entity Account Managers (you should have two if possible).

Add User as Group Member

Find the user you would like to add to your entity's account in the Available Users section.



Select the user, then use the right double-arrow to move the user from Available Users to Group Members

Add User as Group Member

Group Definition

Name: (HOS) 1 Test Hospital ~ 1111111 ~

Description: Edit group

Group Members

User Mapping: Available Users:

Holly Smith [hosmith]
Holly Wagner [howagner]
Hope McCleaf [homccleaf]
Hospital Tester [lhospital]
Hugo Chavarria [huchavarri]
Ida Waide [idwaide]
Irene Holte [irholte]
Irene Lopez [irlopez]
Ja'Nelle Rivers [jarivers]
Jack Sides [jasides]
Jackie Clifton [jaclifton]
Jackie Cox [jacox]
Jacob Duke [jaduke]
Jacquelin Gondeck [jagondeck]
Jacquie Albini [jaalbini]

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Group Members:

Hospital User [hospital2]

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Group Admins:

Hospital Tester [lhospital]
Molly Rayner [morayner]

Save Cancel Help

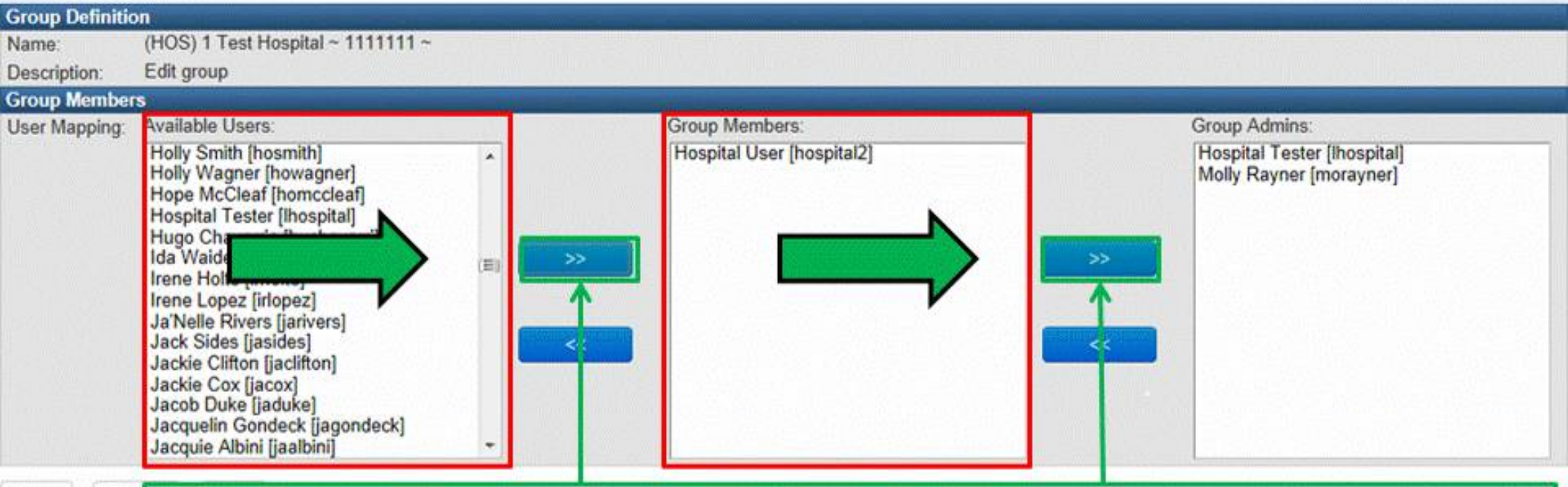
The user now displays under Group Members.

Select the Save button to finalize your change.

The user is now linked with your entity and may access and/or report records for your entity.

Add User as Account Manager

- Find and select the user that you wish to make an Account Manager from either Available Users or Group Members.



- Using the double arrows, move the user all the way to the Group Admins box.
- If the user was in Available Users, you will move them to Group Members, then to Group Admins.

Add User as Account Manager

Group Definition

Name: (HOS) 1 Test Hospital ~ 1111111 ~

Description: Edit group

Group Members

User Mapping: Available Users:

Holly Smith [hosmith]
Holly Wagner [howagner]
Hope McCleaf [homccleaf]
Hospital Tester [lhospital]
Hugo Chavarria [huchavarri]
Ida Waide [idwaide]
Irene Holte [irholte]
Irene Lopez [irlopez]
Ja'Nelle Rivers [jarivers]
Jack Sides [jasides]
Jackie Clifton [jaclifton]
Jackie Cox [jacox]
Jacob Duke [jaduke]
Jacquelin Gondeck [jagondeck]
Jacquie Albini [jaalbini]

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Group Members:

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Group Admins:

Hospital Tester [lhospital]
Hospital User [hospital2]
Molly Rayne [molrayner]

Save Cancel Help

The user now displays under Group Members.

Select the Save button to confirm your selection.

The user is now an Account Manager and may perform Administrative functions for your entity.

Removing a User from Your Entity

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Remove User from Entity

- Check with the user to see if they report for multiple entities.
- If the user only reports for your entity, you must make the user Inactive.
- If the user reports for multiple entities – DO NOT make the user Inactive.
- If you remove the user from your entity (group) before changing the Status to "Inactive," you will not be able to change the user's Status.
- An active user can still log into the registry, even though they are not associated with any entities, but they are not able to view any records.

Make User Inactive

Users

Login Name	Name	Status	Groups
lhospital	Hospital Tester	Active	(HOS) 1 Test Hospital ~ 1111111 ~

Search for the user you wish to edit by entering the user's name in the Filter field and select Apply.

Filter: hospital tester Status: Apply Clear

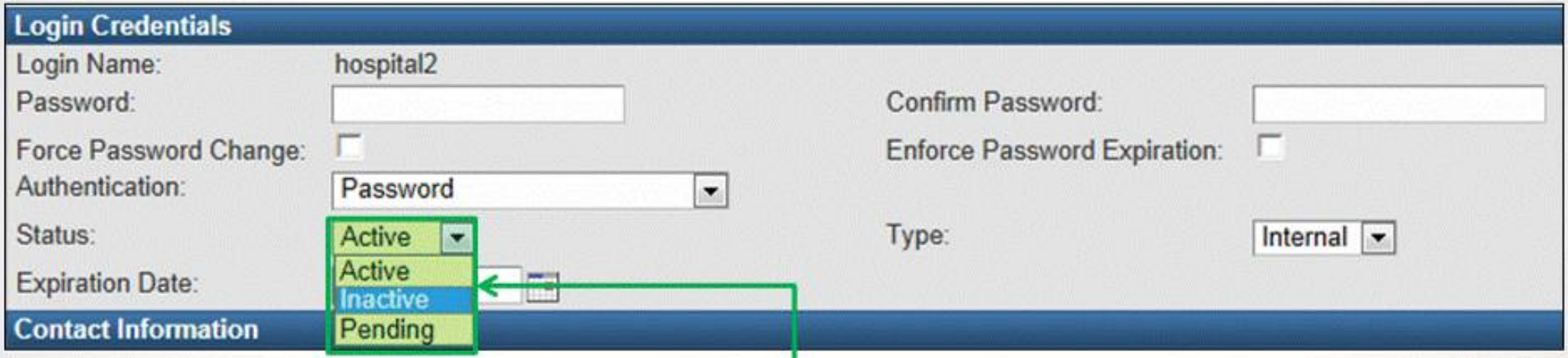
Edit User Add User Delete User

Select row with user's information *(row will be yellow)*.

Select "Edit User" button.

Make User Inactive

DO NOT perform this step if the user reports for multiple entities.



Using the Status drop-down menu, change the status from Active to Inactive.

Select Save at the bottom of the screen to confirm the change.

Remove User from Entity (Group)

Users | Roles | Groups

Groups

Name	Description
(HOS) 1 Test Hospital ~ 1111111 ~	Edit group

Filter:

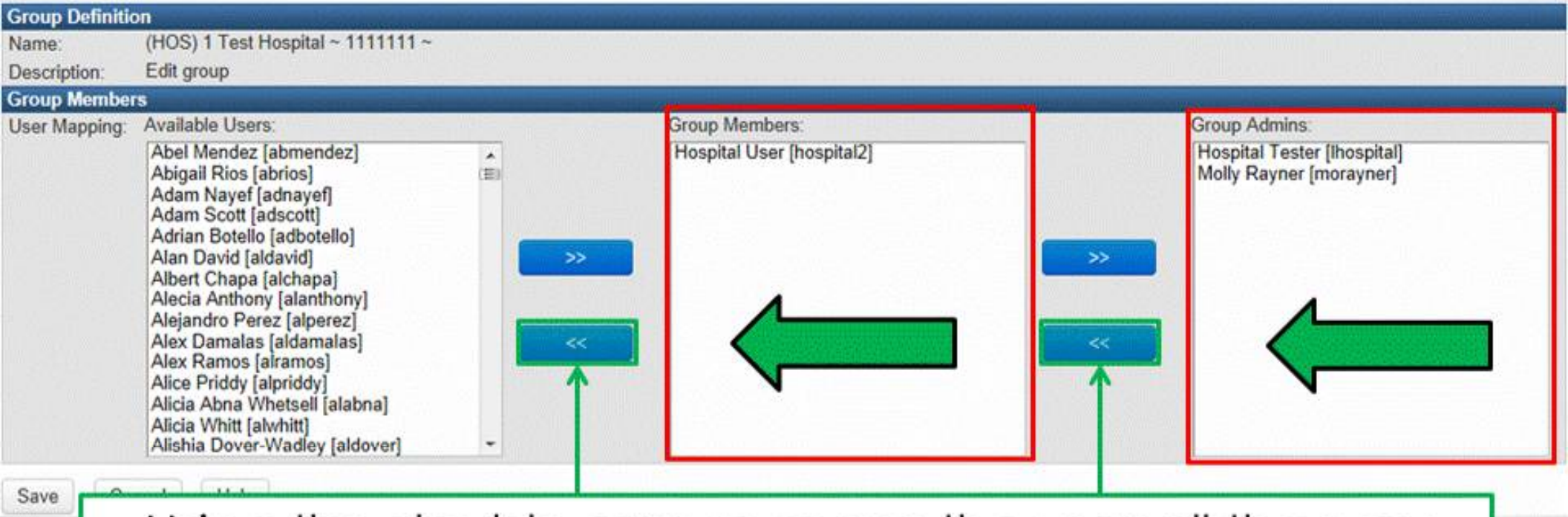
Edit Group

- Under User Administration, select the Groups tab.
- Select the Entity that you wish to remove the user from by clicking on the row *(row will be yellow)*.

Select the "Edit Group" button.

Remove User from Entity (Group)

Select the user you wish to remove from the Group Admins or Group Members box.



- Using the double arrows, move the user all the way to the Available Users box.
- If the user was in Group Admins, you will move them to Group Members, then to Available Users.

Remove User as Group Member

Group Definition

Name: (HOS) 1 Test Hospital ~ 1111111 ~

Description: Edit group

Group Members

User Mapping:

Available Users:

Herb Campbell [hecampbell]
Herbert Frankovich [hefrankovi]
Holly Denny [hodenny]
Holly Ruthven [horuthven]
Holly Smith [hosmith]
Holly Wagner [howagner]
Hope McCleaf [homccleaf]
Hospital Tester [lhospital]
Hospital User [hospital2]
Hugo Chavarria [huchavarri]
Ida Waide [idwaide]
Irene Holte [irholte]
Irene Lopez [irlopez]
Ja'Nelle Rivers [jarivers]
Jack Sides [jasides]

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Group Members:

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Group Admins:

Hospital Tester [lhospital]
Molly Rayner [morayner]

Save Cancel Help

The user now displays under Available Users.

Select the Save button to confirm your selection.

The user is now removed from your entity and can NOT access and/or report your records.

Main Application

1. Searching for Your Entity
2. Entity Record Summary
3. RAC & Other Data Sharing Agreements
4. Attachments

Searching for Your Entity

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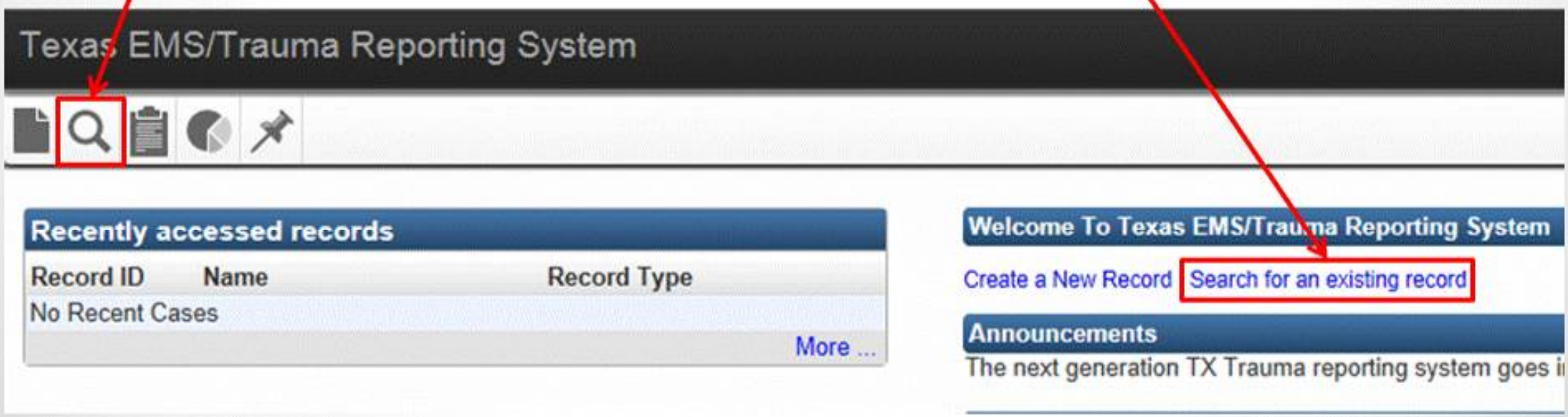
Search for Entity

From the Main Dashboard, you can search for your entity by selecting:

Magnifying Glass

Search for an existing record



Search for Entity

Search Case

Search Criteria

Type: Normal
Record ID:
Last Name:
First Name:
Birth Date: (Inexact)
Gender:
Street:
City:
State:
Zip Code:
Record Type:
Search Options
Search History:
Search Soundex:
Sort By: Create Date
Sort Order: Ascending

Search | Clear | Create New

Search Results

Search Results

Record ID	Name	Birth Date	Record Type	Status	Create Date	External ID
No search done						

Showing 0 to 0 of 0 entries

First | Previous | Next | Last

Select | Create Record for Person | Cancel

Record Type:
Search Options
Search History:
Search Soundex:

Hospital
Patient Record - Hospital
Patient Record - Submersion

- Select the appropriate entity type from the drop-down menu.
- Selecting an entity type will change Last Name/First Name fields to a single Name field.

Search for Entity

Search Event

Search Criteria

Type: EMS/Trauma Record
Record ID:
Name:
Street Address:
City:
State:
County:
Record Type: Hospital
Event Date: -

Search Options

Sort By: Create Date
Sort Order: Descending
Search History:

Search | Clear

Search Results

Search Results

Record ID	Hospital	Birth Date	Record Type	Trauma date	EMS Org	Injury

No search done

Use selected event | Cancel

Select Search to continue.

- You do not have to enter any other search criteria.
- The search will automatically bring up your entity/entities that you have permission to view.

Search for Entity

Search Case

Person Details

Type: Normal
Record ID:
Name:
Street:
City:
State:
Zip Code:
Record Type: Hospital

Search Options

Search History:
Search Soundex:
Sort By: Create Date
Sort Order: Ascending

Search | Clear | Create New

Search Results

Search Results

Record ID	Name	Record Type	Status	Create Date	External ID
HOS_1538	1 Test Hospital	Hospital	Open	01/01/2002	PELELTSZYBCFR

Showing 1 to 1 of 1 entries

First | Previous | 1 | Next | Last

Select | Create Record for Organization | Cancel

Select your entity from the Search Results by clicking on the row (row will be yellow once selected).

Select

Press Select to Continue.

Entity Record Summary

...

Entity Record Summary

- The Record Summary screen is an overview of Entity Record information.
- There are three main sections to this screen.

Record Summary

1. Basic Information

2. Notes

3. Question Packages

Edit Record Properties

Record Data | Concerns | Hospital | Record History

View Question Package | Wizards | View Wizard

Entity Record Summary

1. Basic Information

Basic Information	
Record ID:	Unique ID assigned by the system
Record Type:	Type of event
Primary Hospital:	Hospital Name and Phone Number
Status:	Current status of the event
Linked Records:	Record linking will be done by DSHS
Attachments:	Attach files (i.e. Business Associate Agreement)
Notifications:	Contains custom information (i.e. DSHS ID)

Entity Record Summary

2. Notes

Notes (Add/Edit | Show My Notes)

The notes section is where DSHS can enter any additional comments or information regarding your entity.

Entity Record Summary

3. Question Packages

Question Packages are groups of questions that share a common theme.

Question Packages	
Question Package	
› Administrative	(Manage RAC and Business Associate Agreements)
General Information	(Entity Location Info, Mailing Address, Software)etc.
Contact Information	(Main contact for your entity)
Registration	(Facility characteristics)
Submission Status	(Overview of record submissions via roster import)
Entity Import Information (Not Editable)	(Entity info imported by DSHS)
Customer Service Requests	(Coming soon)
No Reportable Data (NRD)	(Go here to report No Reportable Data)

RAC & Other Business Associate Agreements (BAA)

...

RAC & Other Business Associate Agreements (BAA)

- If your entity wishes your Regional Advisory Council (RAC) to have access to and/or submit data for your entity
- If your entity wishes a third-party (e.g. vendor, billing company etc.)a business associate agreement (BAA) <u>must</u> be completed and signed by both parties and attached to the entity's record

RAC & Other Business Associate Agreements (BAA)

- It is the entity's responsibility to obtain the electronic BAA agreement (a scanned copy with signatures) and attach the electronic file to the entity record in the EMS/Trauma Registry system, as this agreement gives another party access to the private health information of the entity's patients
- **All agreements will be reviewed by registry staff before access to data is allowed between parties**

Business Associate Agreements (BAA)

- The format of the document is decided by the entity
- DSHS approval
  1. A signed agreement by someone representing the entity's administration* (e.g. hospital or EMS administrator, CEO, Medical Director, etc.)
  2. For RACs, vendors, billing companies: either the:
     a. A signed agreement by the RAC Chair or Director, or
     b. A signed agreement by the Vendor or billing company administrator or owner

How the Entity Account Manager Attaches the BAA

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Attachments

Record Summary

Basic Information

Record ID:	HOS_1538 External ID:HOS_1111111
Record Type:	Hospital
Primary Hospital:	1 Test Hospital Phone: (555) 555-5555
Status:	Open
Linked Records:	0 linked record(s)
Attachments:	0 attachment(s) (Add)
Notifications:	DSHS ID: 1111111

Edit Record Properties

Attach the Business Associate Agreement to the Entity record

Select the "Add" link in the Attachments row of the Basic Information block

Add Attachment

Add Attachment - 1 Test Hospital - Hospital

Attachment Information

File: C:\Users\CTmrayner770\Desktop\RAC Business Assoc Browse...

Description: RAC Business Associate Agreement

Hospital: 1 Test Hospital

Status: Requires Review

Type: General

Security Level: None

Notes:

Save Cancel Help

Attach file by using the Browse button.

Enter a description for the attachment.

Check to ensure the Hospital is correct and the Status is set to Requires Review.

Select the Save button to attach.

For RAC or other business agreements, you must continue to the Administrative Question Package to submit for approval by DSHS.

Administrative Question Package

Record Data | Concerns | Hospital | Record History

Question Packages

Question Package	Hospital	Last Update
Administrative	1 Test Hospital	08/01/2013
General Information	1 Test Hospital	08/01/2013
Contact Information	1 Test Hospital	08/01/2013
Registration	1 Test Hospital	08/01/2013
Submission Status	1 Test Hospital	08/01/2013
Entity Import Information (Not Editable)	1 Test Hospital	08/01/2013
Customer Service Requests	1 Test Hospital	08/01/2013
No Reportable Data (NRD)	1 Test Hospital	08/01/2013

View Question Package | Wizards | View Wizard

- On the entity's Record Summary page, open the "Administrative" question package.
- This is where you will complete the final steps prior to submitting an agreement for approval.

RAC Agreements

Is there a signed RAC agreement attached to this record?

- Select "Yes" from the drop-down menu.

Enter the Agreement Start Date and End Date.

The RAC field will auto-populate – check to ensure the correct RAC is listed.

Select the Save button to submit for approval.

RAC Agreements

After DSHS review, the DSHS Approved field will either display "Yes" or "No."

DSHS Approved		DSHS Reviewer	Date of Review		Reason not approved

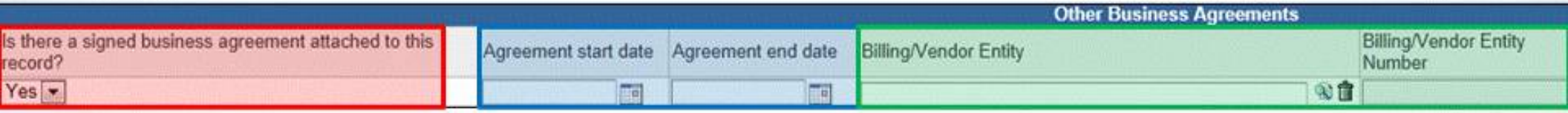
DSHS Reviewer's name will display and the Date of Review.

If the agreement was <u>not</u> approved, a note will be displayed in "Reason not approved."

Other Business Agreements

Is there a signed business agreement attached to this record?

- Select "Yes" from the drop-down menu.



Enter the Agreement Start Date and End Date.

- Select vendor, billing company, or entity using the search function (select the magnifying glass).
- The Entity Number will auto-populate.

Select the Save button to submit for approval.

Other Business Agreements

After DSHS review, the DSHS Approved field will either display "Yes" or "No."

DSHS Approved		DSHS Reviewer	Date of Review		Reason not approved

DSHS Reviewer's name will display and the Date of Review.

If the agreement was <u>not</u> approved, a note will be displayed in "Reason not approved."

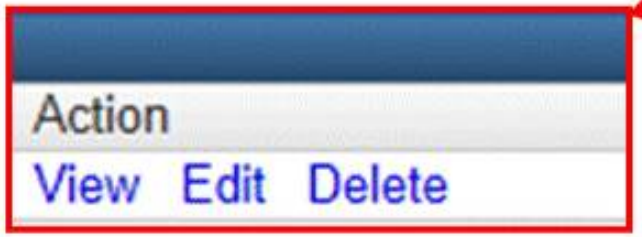
Manage Attachments

Manage Attachments - 1 Test Hospital - Hospital

Attachments

Create Date	Hospital	File	Description	Status	Type	Updated By	Security Level	Action
08/13/2013	1 Test Hospital	RAC Business Associate Agreement.docx	RAC Business Associate Agreement	Requires Review	General	Molly Rayner [morayner]	None	View Edit Delete

Add Attachment Dashboard Help



Actions:

1. View – download the attachment

2. Edit – attach a new file, update the description, etc.

3. Delete – remove the attachment

When you are finished managing attachments, select the Dashboard button to return to the entity's main page

Manage Attachments

Record Summary

Basic Information	
Record ID:	HOS_1538 External ID:HOS_1111111
Record Type:	Hospital
Primary Hospital:	1 Test Hospital Phone: (555) 555-5555
Status:	Open
Linked Records:	0 linked record(s)
Attachments:	1 attachment(s) (Add) (View)
Notifications:	DSHS ID: 1111111

Edit Record Properties

- The Attachments row now lists "1 attachment(s)"
- Select the "Add" link to attach another agreement
- Select the "View" link to return to Manage Attachments screen *(shown on previous slide)*