EMAR Direct Connect
Resident Entry Demographic Information

The bulk of data for a resident is entered in Resident Care Management. Resident Care Management has the following tabs: Main, Contacts, Medical Info, Meds, Notes, and Other.

This session includes: admitting a resident, discharging a resident, completion of resident care management main tab, contacts and other tabs. Main – includes resident demographics information and census information. Contacts – includes personal and professional contacts, interests, religion, church, and funeral home. Other – import resident photos, entry into user defined fields.

To access Resident Care Management, click on the Resident Care Management icon.

Or click on “File” and select “ Resident. ”
Resident Care Management Listing: This is the initial screen you will see, all of your residents will be listed here.

To find a resident, type a portion of their first or last name into the “Find” field.

Use “Hide Discharge” to shorten the resident list to current residents only.

To view or edit resident information, double click on the resident name in the list.

Adding a Resident:

To add a new resident, click on the “New” button (bottom left hand corner of screen) and the following window will open:

You will have 3 choices. Use “New Resident” if this person has never been in your facility or another facility in your database.
If you select **New Resident**, the following window will open:

![New Resident Window](image)

Enter the resident first name and last name. If your facility has the option to prevent duplicate Social Security Numbers, you will also need to enter that. Click OK. You will then be on the main tab or Resident Care Management.

If you select **Re-Admission**, a list of residents who have been previously discharged from this facility will be displayed.

![Select Resident Window](image)

To find the resident in the list, type in the resident name in the “Filter By” field or use the scroll bar. Double click on the name, or highlight the name and click OK. This will bring you to the main tab of Resident Care Management. Update the information on this resident.

**Admit a resident previously discharged from another facility** is used in the multi-facility database to admit a resident that has been discharged from a sister facility. Selecting this option will bring up a list to select the facility the resident has been discharged from. Facility listing will include any facilities you have access to in your database.

![Select Facility Window](image)

Highlight the facility name and click OK, this will bring up a list of discharged residents. Select the resident as explained above.

This option will copy some resident information from one facility to another in a multi-facility database. Items copied include: demographic information, contacts and medications.
Main Tab:

The tab or enter/return keys will move you through the fields. If you press the enter key on the number pad, the record will be saved and this window will be closed.

Shift + tab will move you back a field.

Lookup options – ![Lookup option] or ![Lookup option]
When a field has one of these 2 symbols at the end of it that means there is a master list of responses for this field. Click on the symbol to access the list. You can select an item, modify an item, or add to the list. Access to editing these lists can be restricted by your database administrator.

Resident Demographic Information
Enter the resident name, the first letter will be automatically capitalized when you move to the next field.

Social Security number will format with dashes – just type in the numbers XXX-XX-XXXX
Phone Numbers will format – just type in the 10 digits   (XXX) XXX-XXXX

Adding a new Referral Source must be completed in the setup area of the program (File, Setup, Referral Source).
Variations to the Main tab for **Florida:**

For Facilities in Florida, you will have a field for Medicaid Number and Medicaid Control Number.

Variations to the Main tab for **Illinois:**

For Facilities in Illinois, you will have a field for RIN Number.

**Admittance & Discharge:**

Admission and Discharge dates are the clinical census date fields. These dates are used to record the physical admission and discharge dates for when the resident is in the building.

Note: There is a separate place to record leave of absence from the building.
Admitting a Resident:

Click on Admit Button.

New Admission or Readmission:

For a new resident or a re-admission, click on “Admit Resident.”

“View Admission History” will bring up a listing of all admission records for a resident.

Enter the admit date by typing in the date using slashes (example: 3/22) then press tab. If no year is entered, the assumption is the current year.

If the admit date is the current date, enter a T in the admit date field and press tab. Today’s date will pull in.

Click on the calendar to select a date.

Enter the time: Times can be entered as 9a or 330p, and when you tab or click in another field it will be formatted as 9:00 AM or 3:30 PM.

Select the appropriate prior living status.

Note: If you do not see the “Modify Setup” button, you do not have rights to edit this list.

If you have been given access to this setup table in the employee settings you will see the “Modify Setup” button and will be able to edit this choice list.
Note: If the admit date is already completed, when you click on “Admit” the option will be to Modify Admittance. The admit resident screen will open and you can update/edit the previous entries.

To complete the admission for a resident you will need to enter Unit history.

NOTE: A resident must have an accurate unit history to pull to the correct Med Provider schedule for medication passes. If the resident has no unit history they will not pull to any Med Provider schedule.

If you get your new admissions from the pharmacy interface, you MUST ensure the unit history contains the correct unit.

Unit History
Click the “Add” button under unit history and the select unit window will open displaying all available (unoccupied) units.

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Click the “Add” button under unit history and the select unit window will open displaying all available (unoccupied) units.

Double click on the unit the resident is in or highlight the line and click on “Select.”

If the resident’s unit is not displayed, Click on the All Units tab to see the entire list of units.
Update the move in date as needed (double click in the date field). **Check the 2nd Occupant box if this person is the second occupant in a unit.** Marking second occupant will impact report totals for unit census.

**Unit Changes:**
If a resident changes units, click on the add button for Unit History, and enter the move in date for the new unit. This will update the move out date on the previous line and select the new unit.

**Discharging the Resident:**
Note: Do not discharge the resident if they go to the hospital or on a leave, please use the LOA tab or File – Resident on LOA to record this information.

Click on the Discharge Button.

Enter the Discharge Date.
If it is the current date, you can enter a T for today and tab. You can use the calendar lookup, or you can enter the date as 3/22 and tab. If no year is entered it will default to the current year.

Enter the discharge time. This is important if you are entering medications or services on hold.

Select a discharge reason and a discharge to.
Discharge Resident Utility for End Dates:
When you have completed this screen, click on the Next button for the Discharge Utility.

This list is the reasons for discharge – why did they leave the facility?
Highlight and select.
This list can be edited under File – Setup – Discharge Reasons.

The “Discharge To” is used for location – Where did they go?
Highlight and click select or click on “Modify” to add to/edit the list.

Default is to end items on date of discharge/time of discharge. That is always appropriate for services, meds, and services on hold.

If the resident is going to continue to pay rent or other monthly charges after the date of discharge, click the “I’ll do it myself button” for Monthly Charges, Move-Out Date and Pay Source History.
The number in parenthesis, example End Services (3) on: is the total number of records that are active for each item.

**NOTE:** If you click OK and have the wrong date for something, you will still be able to edit the end dates on the screens as before.

**NOTE:** If you discharge someone in error and then remove the Discharge Date, you will have to remove the end dates from anything you did not mark as “I’ll do it myself” and anything you did yourself. There is no utility to remove end dates if resident discharged in error.

**Contact Tab:**
Enter Personal and Professional Contacts.

To change the priority order of contacts, you can drag and drop them on the list. Any contact marked as an Emergency contact will always be higher priority.
Adding a Contact:

Click the add button to add a new Contact.

The first letter of the first name and last name will automatically capitalize. Also in address fields, the first letter after any space will also be capitalized for you.

Click on the lookup for Relationship. Click on the drop down by type to select the type of phone number. Up to 8 phone numbers will print per contact on the face sheet.

If you mark “Emergency Contact,” it will print on the face sheet above the contact name. Priority is used for printing order, in conjunction with Emergency Contacts. Emergency Contacts will always be a higher priority than non-emergency contacts.

E-mail address – if you have Microsoft Outlook you can e-mail directly from the program.
When a check box item is selected, the letters in the parenthesis will print on the face sheet. For example, if you select Power of Attorney (POA), POA will print prior to the contact name on the face sheet.

Alternate Address/Main Address Radio buttons: The default for the address uses the facilities main address, if you want the alternate address to print on the face sheet click the “Use Alternate” radio button.

**Medical Professionals**

Click on Add to add a new Medical Professional.

Use the Lookup to Select the Medical Professional from a list. If the person is not on the list, click on the “Modify Setup” button to add a new person to the lookup.

Select a Role – The role defines the category of this Medical Professional and will print on the facesheet.

If the Role you want is not in the list, click the modify setup button to add to the master list.
Health Plan:

Click on the Add button

A window with a listing of health plans will open. Select the plan from the list or click “Modify” to add a new health plan.

Note: If no health plans have been added, you will be prompted to create the list.

Enter the Policy Number and Group Number.

Pharmacy:

Click the Add button to assign a Pharmacy to the Resident.

A listing of Pharmacies will be displayed. If the Pharmacy you need is not on the list, click on the “Modify Setup” button to add to the master.

You can also edit records on the list by clicking the “Modify Setup” button.
Dental Plan:

Click the add button to assign a Dental Plan to the resident.

A list of Choices will be displayed. If the company you need is not on the list, click on the “Modify” button.

Hospital/Ambulance/Transportation Preference:

Click on the Lookup at the end of each field to select. If there are no items in the listing, you will be prompted to create the listing. If the item you need is not in the list, click on the modify button.

Church/Temple/Religion:

Enter the Church or Temple information and select the religion from the list.

Funeral Home:

Click on the lookup to select the funeral home.

You can use the text box for other things such as organ donor.
Interests:

To edit an existing funeral home or to add a new one, click on the “Modify Setup” button.

Note: To delete items from any of the listings, highlight the row you want to delete and click on the “Del” button (Red Trash Can).

Then click on the lookup/dropdown for Description, Interest, and Skill Level.

Click “Add” to add a new interest.
Other Tab:

Custom fields set up in your database will show here. Click in the field to type your response.

Resident Picture
You can Paste a picture into this area, or use the Import button to import a picture.

Import

Miscellaneous
Pharmacy ID: bedtany

Home Health Client Roster
Payer Text
Providers

Miscellaneous:
The resident ID for the interface with the pharmacy will be stored here.

Home Health Client Roster:
Used for an old report in the system, only a few clients still use this report.
Resident Pictures

**Thin Client and Non-Hosted sites**: click on the import button, browse to where the picture is stored on your computer, click on the file you want, and click open.

The import button does not function for clients on Hosted Sites unless you mark “Share Drives” in the Remote Desktop options (see accessing Service Minder Manual for details). If you have difficulty with the import button, either finding your photos or importing the photo, then follow the steps below:

Save the picture on your computer. You will need to open the picture in Paint (start, all programs, accessories, paint). Click on edit, click on select all, and then copy. In Service Minder click inside the picture field, click on edit, click on paste.

**Copying Resident photos into Service Minder for Hosted sites:**

Note: The “Import” button does not function for hosted clients.

- Save the picture on your computer.
- You will need to open the picture with Paint (start, all programs, accessories, paint) – Click on Open and browse to find the picture OR Right click on the picture and select open with and browse to find paint, whichever way is easier for you.
- Click on edit, then click on select all.
- Click on edit, then copy.
- In Service Minder, click in the picture field. Click on edit, click on paste.

A few things to consider when you are taking the photos:

1. If your camera has the capability to change the pixel setting, set it lower – this decreases the file size of the picture and makes it easier to import or copy.
2. If you have Microsoft picture manager, or another program that allows you to “compress” the pictures, usually compressing them to web page or e-mail size helps with the copying.
3. It is also helpful to crop the pictures.
4. Installing of Quicktime on your computer helps with the importing of pictures for non-hosted clients and copying of pictures for hosted clients.