South Dakota Agency Admin Training Guide

Table of Contents

Help / University

Access videos, guides, help articles, downloadable PDFs, the glossary, and the index for Elite and Elite Field.

NOTE: Locate the articles listed in the sections below in Help / University by searching for the article's title.

Navigation: *Community tab > Help / University*

Implementation Checklist

This document includes a description and directions to many different parts of the Elite system. Below is a checklist of the **most important items** you should review.

- ☐ Vehicles & Call Signs
- ☐ Favorite Locations
- ☐ Shifts
- ☐ Zones & Districts
- ☐ Agency location with one identified as Headquarters and it should include Address / Phone.
- ☐ Facilities
- ☐ Supporting Agencies & Units
- ☐ Users (most important fields)
  - First name
  - Last name
  - Email
  - State licensure ID
  - Practice level
  - Role
  - Show in EMS Runform
  - Username
  - Password
  - Permission group
  - Agency Status Active
- ☐ Agency Information

Incidents

Workflow Options

There are many options and settings you can use to customize Elite for your workflow. The EMS Workflow Settings document includes a short overview of each of the options and settings

Help / University Keyword: "EMS Workflow Settings"

Creating and Viewing Incidents

Create new incidents and view existing incidents from the Incidents tab in the app menu.

Help / University Keyword: "Creating a New Incident" **or** "Opening Incidents"

Navigation: *Incidents > Create New EMS* or *View Existing*

Incident Forms and Documenting Incidents

Create new incidents using the available incident form templates. To update a form template, contact the state.

Documenting Incidents Notes:

- **Help / University Keywords:** "Incident Form Navigation," "Entering Information into an Incident" **and** "Locating Fields on Incidents"
- Validation rules with a red circle and line must be completed before an incident can move through processing. (**Help / University Keyword:** "Fixing Validation Errors").
- Response times and mileage fields appear on the Times and Mileage slide-out panels.
- The Timeline displays the timeline of the incident, including when treatment was provided, (**Help / University Keyword:** "Timeline and Patient Encounter Timeline").
- The Patient Encounter Timeline displays past incident information for a repeat patient.
- Lock incidents (via the Menu) to prevent users without Unlock permissions from opening and editing the incident, (**Help / University Keyword:** "Lock or Unlock Incidents").
- Use Print to view a browser formatted incident report; use PDF to view a PDF version incident report, (**Help / University Keyword:** "Generating a PDF").
- Purchase Elite Field to begin downloading vitals into incidents.

Reviewing Incidents

The CQI module allows users to review full incidents or only specific parts of incidents, send / receive messages inside the review, view the incident, incident attachments and more.

Help / University Keyword: "CQI Overview"

Incident Lists

View all the incidents created by your agency in the EMS Incident List. You can create incident views to specify which incidents are visible in the list based on criteria. Inside an incident list, you can also export incidents, lock / unlock, view incident history, incident attachments and more.

Help / University Keyword: "EMS Incident Lists"

Incident List Views

Create a view for an incident list that only displays the incidents, columns and filters you want and need. Make the view public to share with the users in your agency or a private for yourself.

Help / University Keyword: "Configurable Incident Lists in Elite"

Navigation: *Agency Name > Configuration > Incident List Views*

Set Up and Configuration Before Allowing Agency Users Access

Agency Locations

Add each of your fixed or pre-determined agency locations to the Agency Location module. On incidents, providers can to auto-populate the Vehicle Dispatch Location (eResponse.16) field on incidents.

Help / University Keyword: "Agency Locations Overview"

Navigation: *Resources > Agency Locations*

Facilities

Add all of the locations to which you transfer patients to or from to the Facilities module. On incidents, providers select a facility and the facility's address information auto-populates into the facility's address fields. Providers can select a facility as a dispatch location, incident facility or location, transferred to location. Additionally, the selected facility also auto-populates the Type of Destination (eFacility.01) field.

Help / University Keyword: "Facilities Overview"

Navigation: *Resources > Facilities*

Favorite Postal Codes

Create a list of the city, state and postal code combinations used most often by your agency. On incidents, providers can select a combination to quickly populate the Incident City, Incident County, Incident State and Incident Postal Code fields. Favorite Postal Codes can reduces the number of fields your providers need to enter data into manually.

Help / University Keyword: "Favorite Postal Codes Overview"

Navigation: *Resources > Favorite Postal Codes*

Insurance Companies

Add insurance company information to your Elite site to auto-populate the insurance company's name and insurance company ID's on incidents.

Help / University Keyword: "Insurance Companies Overview"

Navigation: *Resources > Insurance Companies*

Leave of Absence Reasons

Create a list of leave of absences reasons to use when recording a user's absence inside their user accounts. Only the reasons on this list are available for selection inside user accounts.

Help / University Keyword: "Leave of Absence Reasons"

Navigation: *Resources > Leave of Absence Reasons*

Medication Defaults

Add default dosages and delivery routes for the medications your agency uses most often. On incidents, providers can select a medication and if the medication has defaults set, defaults auto-populate the medicine's dosage, dosage units and administered route fields.

Help / University Keyword: "Medication Defaults"

NOTE: Medication defaults set in Form Manager on the incident's form template, override defaults set in the Medications Defaults module.

Navigation: *Resources > Medication Defaults*

Meds / Procs by Cert Level

Allow or prevent providers from performing specific procedures or from administering specific medications based on provider certifications.

Help / University Keyword: "Meds/Procs by Cert Level Overview"

Navigation: *Resources > Meds / Procs by Cert Level*

Patient Records

Manually add or edit patient information in Patient Records or configure your system to automatically save patient data to your list of repeat patients.

Help / University Keyword: "Patient Records Overview" **and** "Repeat Patients in Elite"

Navigation: *Resources > Repeat Patients*

Shifts

Record your agency's shift information in the Shifts module. On incidents, providers can select from the available shifts to add a shift to the incident.

Help / University Keyword: "Shits Overview"

Navigation: *Resources > Shifts*

Signatures

Create the text and the list of available languages that displays with the signature fields on incident forms.

Help / University Keyword: "Signatures Overview"

Navigation: *Resources > Signatures*

Supplemental Questions

Collect additional information on incident forms by creating supplemental questions. All active supplemental questions appear on incidents.

Help / University Keyword: "Supplemental Questions Overview"

NOTE: The state of South Dakota has added a field to the form templates which displays all active supplemental questions on incidents created with that template.

Navigation: *Resources > Supplemental Questions*

Supply Items

Record supply items used on incidents by creating a list of your supply items.

Help / University Keyword: "Supply Item Overivew"

Navigation: *Resources > Supply Items*

Supporting Agencies & Units

Record mutual aid, transferred units and first arriving units by adding the agencies and units to the Supporting Agencies & Units module.

Help / University Keyword: "Supporting Agencies & Units Overview"

Navigation: *Resources > Supporting Agencies & Units*

Vehicles & Call Signs

Add your vehicles and their corresponding call signs to the Vehicles & Call Signs module. On incidents, selecting a vehicle or call sign auto-populates the other field's value and a vehicle's type (itResponse.020). Additionally, only the vehicles marked as mutual aid vehicles can be documented as mutual aid.

Help / University Keyword: "Insurance Companies Overview"

Navigation: *Resources > Vehicles & Call Signs*

Zones & Districts

Add your agency's zones or districts to the Zones & Districts module to view reports on incidents in that zone or district in Report Writer.

Help / University Keyword: "Zones & Districts"

Navigation: *Resources > Zones & Districts*

Agency Information

Security and Passwords

The Elite system's security is managed at the System level; this includes password requirements, permission groups, inactivity timeout warnings and settings. At the Agency level, you can manage users' access to your agency, and reset their passwords and their login status from their user accounts.

Help / University Keyword: "Reset or Disable Agency Status" **and** "Reset Forgotten Passwords"

Access to different areas of the system and the ability to perform specific tasks are dependent on a user's permission group. If allowed by your System Administrator, you can override some or all of the permission settings in a permission group for an individual user; this is useful for training by restricting access until users are familiar with the workflow.

Help / University Keyword: "Editing a User's Account Details" **and** "Permissions and Allow Override"

Agency Information

All agencies must complete the Agency Information module. If the required fields are missing data, then NEMSIS cannot accept your data nor can you send the data. The Service Areas and Statistical Year Information tabs only require a minimum of one record for each tab to meet the NEMSIS requirements. Ensure all information pre-populated in the Details section is correct.

Help / University Keyword: "Managing Agency Information"

Navigation: *Agency Name > Agency Information*

Users

User Accounts

The Users module in Elite is where user accounts are located. Inside each user account, is a user's permission group, individual permissions (if there are any overriding the permission group's permissions), settings to allow / prevent the user from logging into the agency, to reset their password, the user's contact, employment, certification information and more.

All users requiring access to Elite or Elite Field require a user account.

Help / University Keyword: "Users List: Agency Level" **and** "Adding Users"

Important Fields: Ensure your users complete the following fields in their user's account if they are documenting or accessing incidents.

- **Demographics tab:** First Name, Last Name, Email Address (marked as primary)

- **Certifications tab:** State Licensure ID (or your certification number with EMS or board certification number), Agency Licensure Level / Practice Level, Crew Member Role
- **Employment tab:** *Show in EMS Run Form* = *Active*, *CQI Reviewer* = *Active* (if allowed to review reports in CQI module)
- **Account Details tab:** Permission Group

Navigation: *Agency Name > Users*