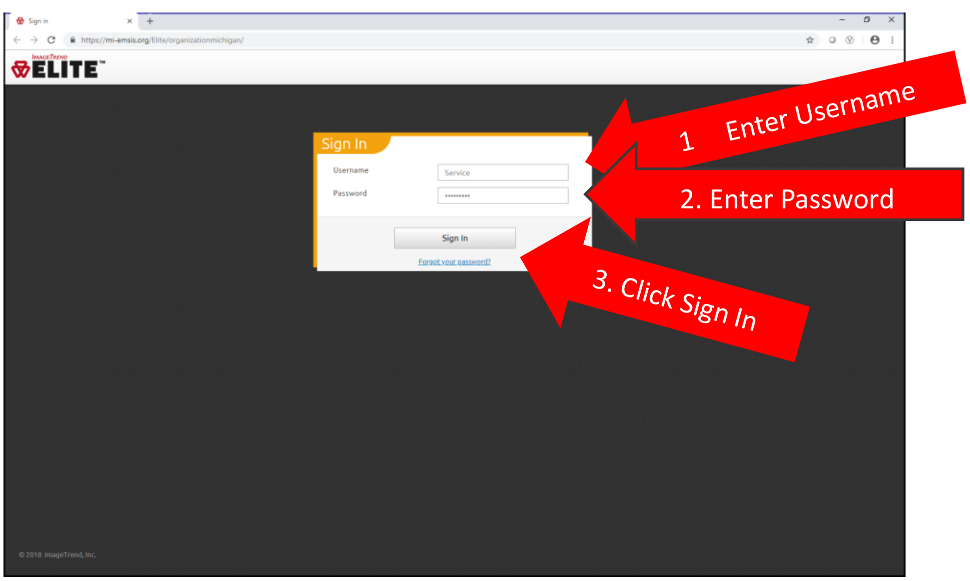
ImageTrend Elite Agency Setup Guide

Welcome to the Michigan Imagetrend Elite Agency Portal. The Department makes this portal available to all licensed EMS agencies to simplify and streamline the data collection process. This setup guide will provide instructions for setting up your EMS agency in the Elite Portal to begin entering data in to the Michigan EMS Information System (MI-EMSIS).

The setup guide is broken down into 6 parts:

Getting Started

1) Log in to the Michigan ImageTrend Elite Portal at https://www.mi-emsis.org/elite/organizationmichigan/.

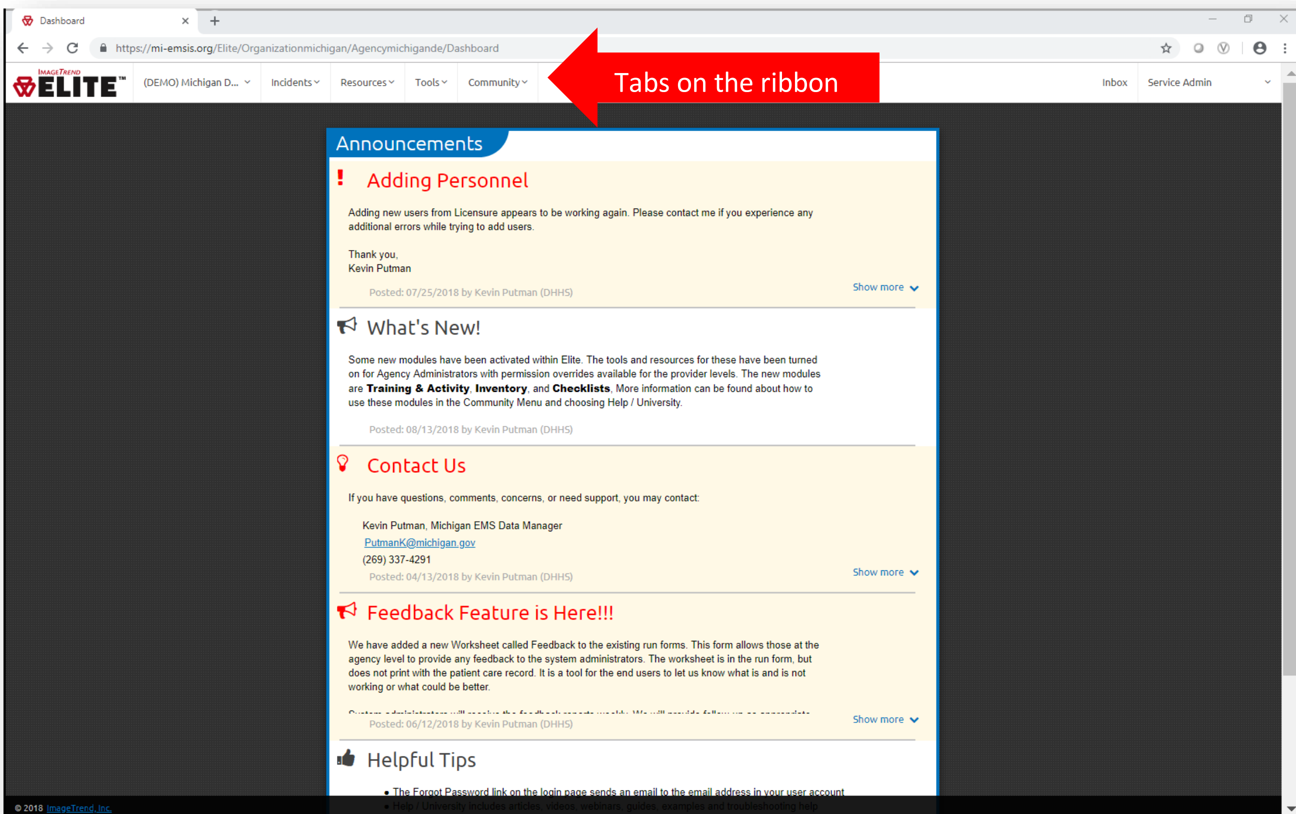


2) A user's EMS eLicensing Portal (https://www.mi-emsis.org/licensure) login credentials are the same credentials used to log into Elite for all associated agencies.

> **Note:** If you are adding non-licensed personnel to your agency, such as an administrative assistants or billers, the user must first create an account in the EMS eLicensing Portal.

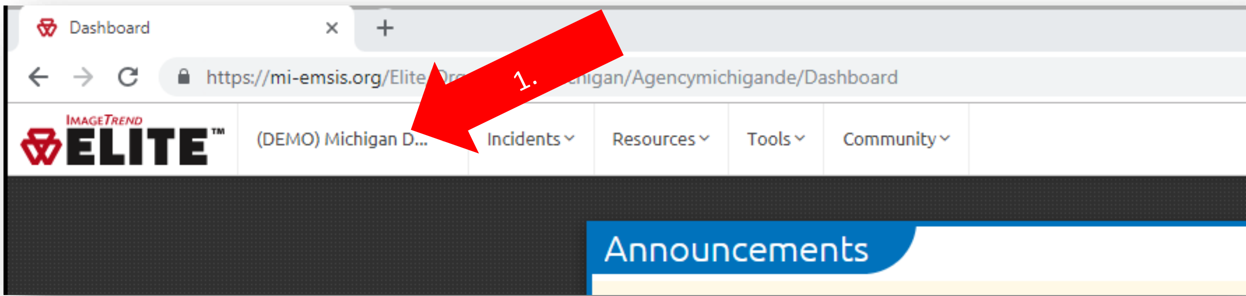
Adding Staff to an Agency

Once signed in, an announcement screen will appear with tabs on the ribbon next to the word ELITE. In order for an agency to add personnel, they must be added to Elite from the EMS eLicensing Portal first. This is done to ensure consistency and accuracy by limiting the number of accounts an individual is assigned.

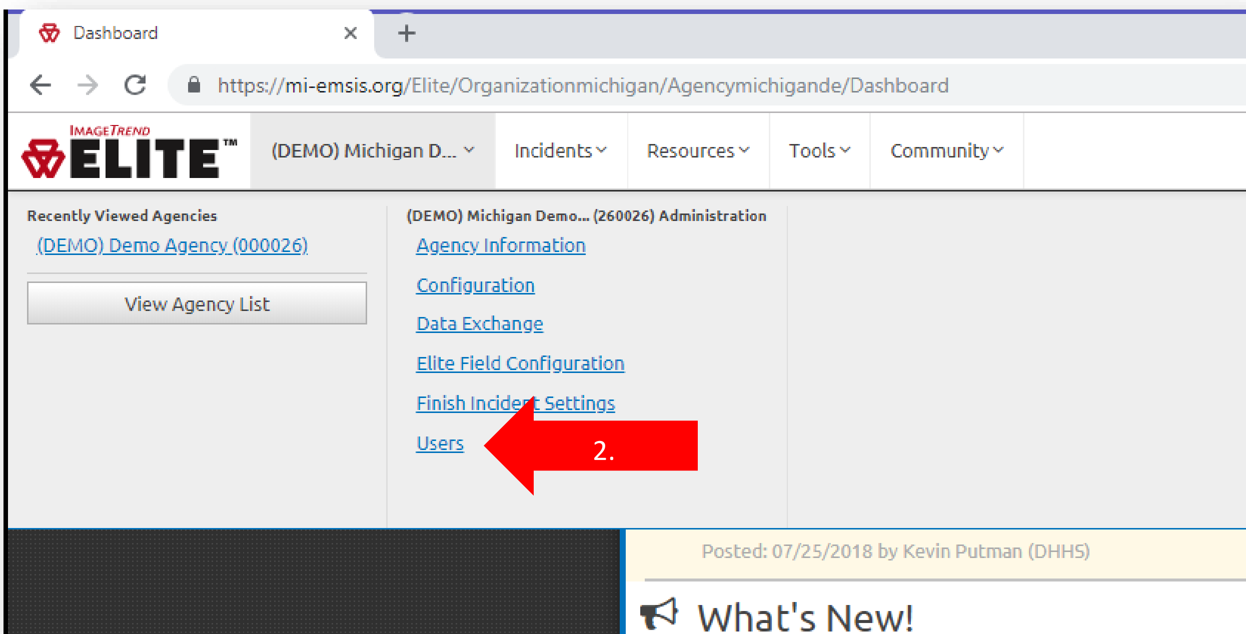


To Add Staff

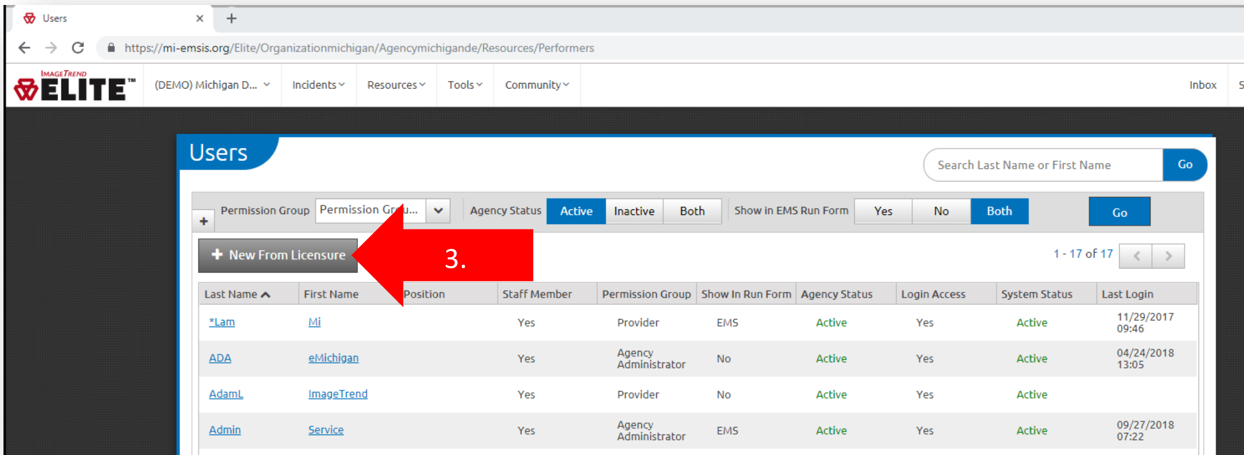
1. Click on your agency name in the upper left-hand corner.



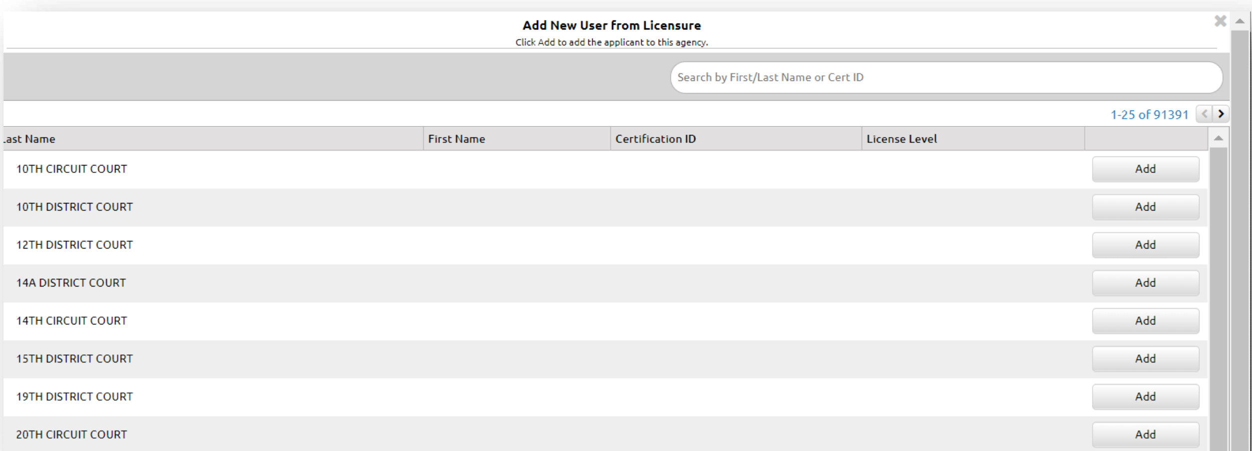
2. Select Users from the menu



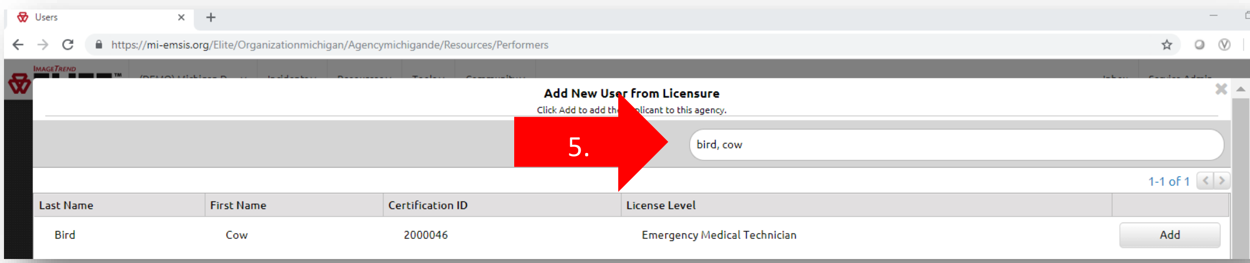
3. This screen will appear. Click +New from Licensure button.



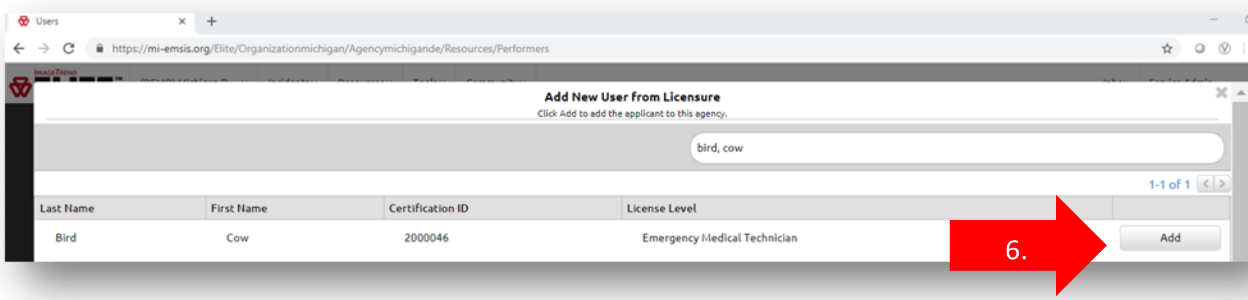
4. This screen will appear and contains **all** entities that are in the Licensure module. Do not be surprised to see Courts or education programs etc.



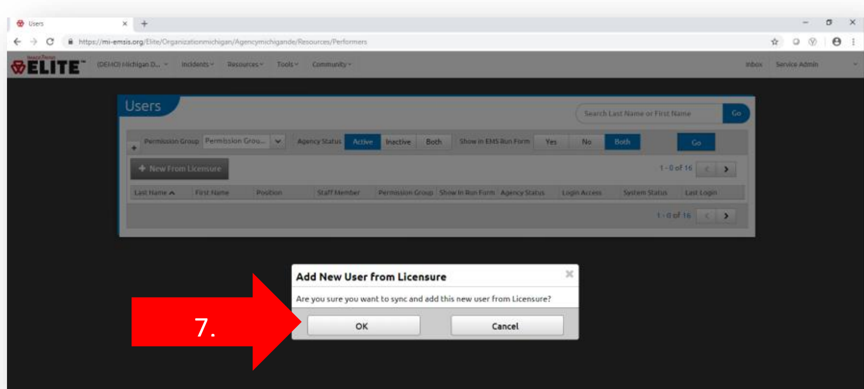
5. To avoid scrolling through all of the providers, enter the provider's last name or the new license number in the search box.



6. Click the add button that corresponds to the individual you would like to add

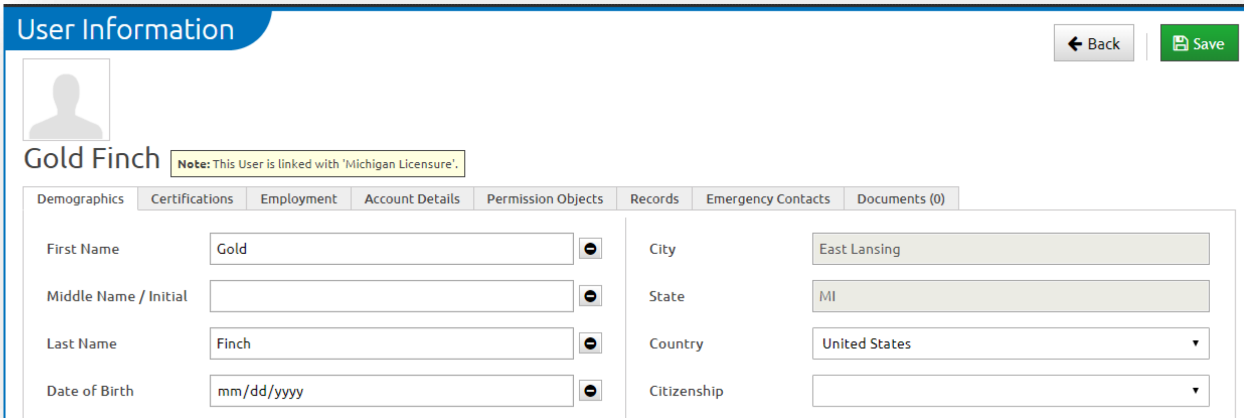


7. The system will then ask if you want to add the new user from Licensure. Click OK.



Permissions

Once a user has been added to the agency list, the User Information box will appear.



This is where the administrator will ensure that the individual has the appropriate permissions for system use. All providers are defaulted to the "Provider" permissions group. The administrator only has to assign a different permission if the individual needs a higher level of permissions.

The box below describes the available permissions.

Agency Administrator – Full rights within an agency

CQI Provider – Similar to Provider group, but has access to all Run Forms, CQI Tools, and the Report Writer, but no other Administrative permissions

Provider (default) – Can only add, edit, and view their own records

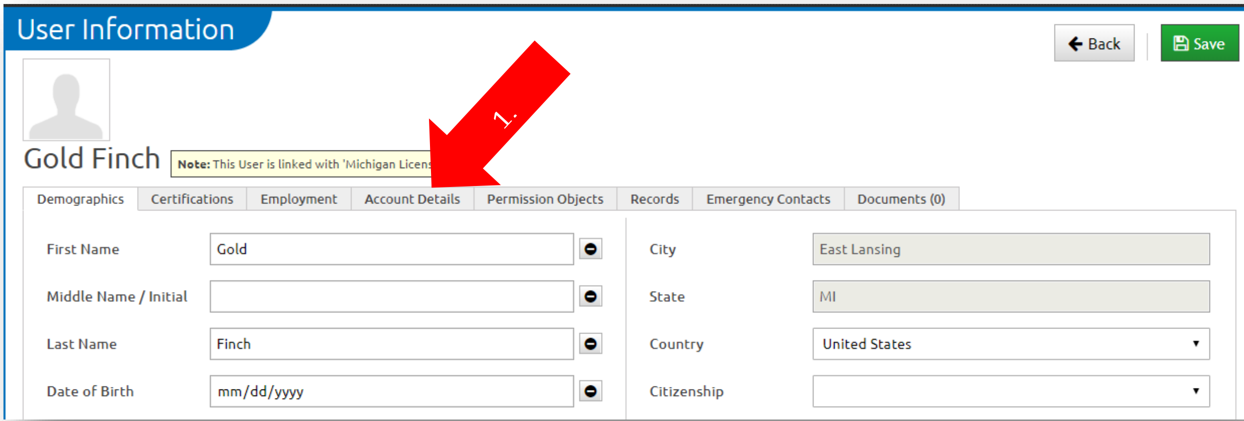
Provider-View In Progress Only – Same as provider, but can only view incidents that have not been completed

Service Billing Agent – Permission Group used for billers that have direct access to your records

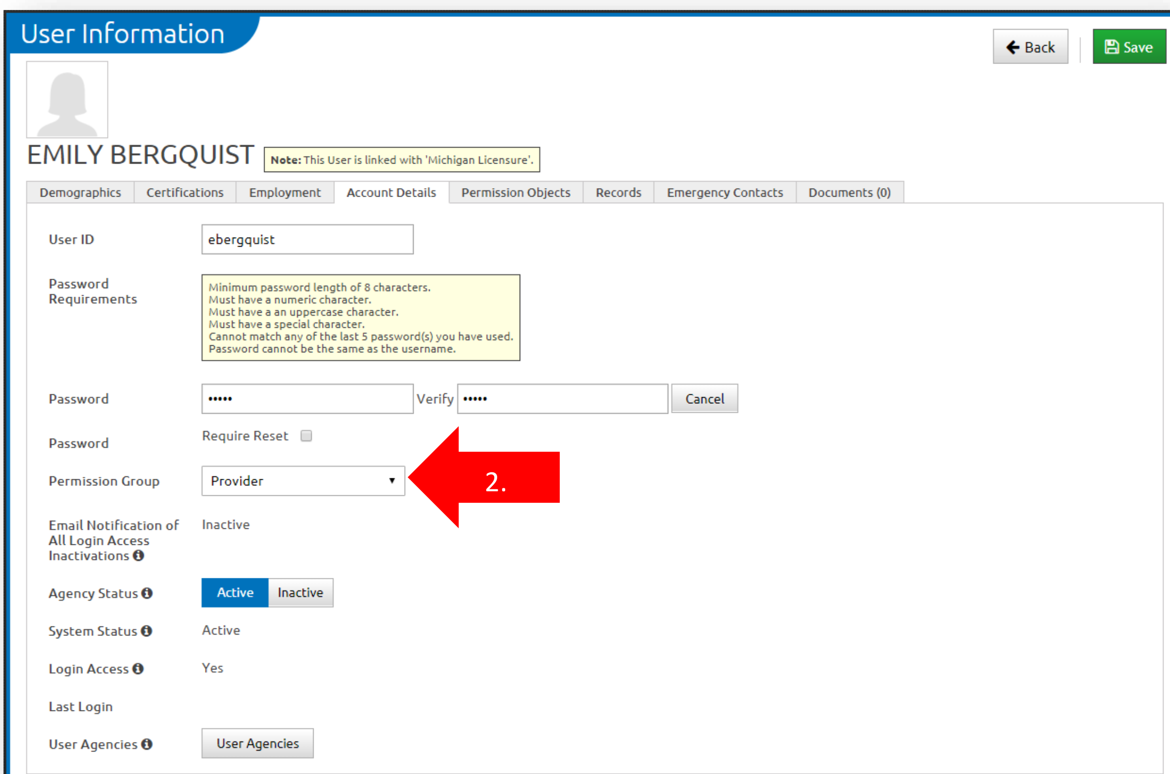
Third Party Vendor – Permission Group used to give access to Data Exchange portions of your system (only useful for non-ImageTrend agencies)

No Access – This permission group restricts access to all Elite features and records within an agency. It is intended for non-ImageTrend agencies that do not wish to have their employees accessing incident data within the State system.

1. To check or change permissions, click on the Account Details tab.



2. Click on the down arrow in the Permissions Group and select the appropriate permission.



Note: When users have been added to the agency, the Administrator should direct the employee to sign in to the Licensure system and claim or create their licensing account if they have not already done so.

Vehicle Setup

Vehicles are imported from the EMS eLicensing Portal. There are some fields that are part of NEMSIS that are not currently captured as part of the current vehicle licensing process. Two of these fields of particular importance are: Vehicle ID (Unit Number) and Call Sign. Since this information is not currently collected by the Department, the information must be entered.

> ***Note:*** If you need to add or remove a vehicle from your license, those are handled through normal agency licensing procedures.

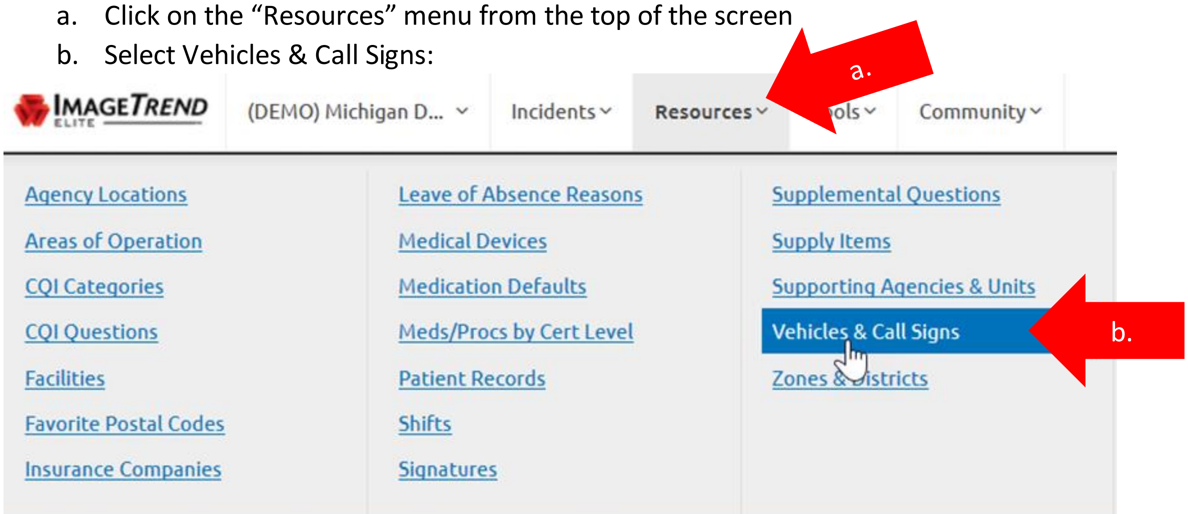
Vehicle ID

It is recommended that the Vehicle ID be unique to the vehicle and not match the call sign. This is particularly important if the call sign of the vehicle may change over the course of ownership. If assigning unique Vehicle IDs is not common within the agency, a good practice is to use the last four digits of the VIN, as this is likely to be unique within each service.

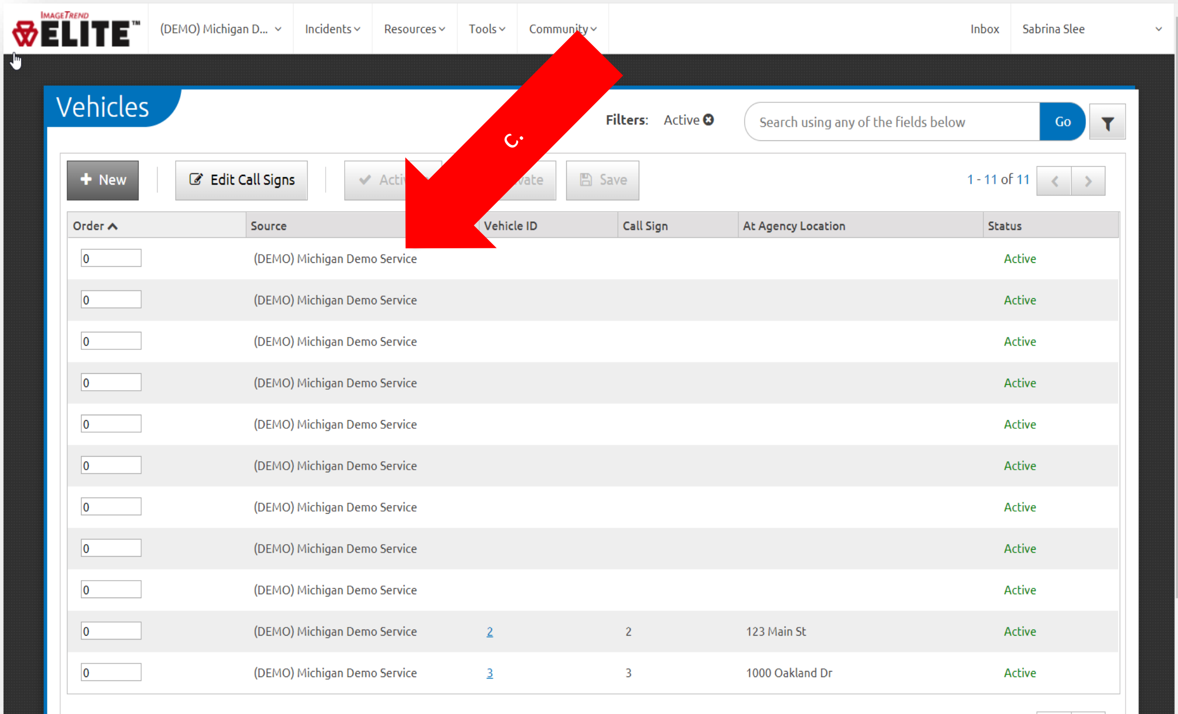
Call Signs

Call signs are no longer tied to a single vehicle. This is beneficial for those agencies where the call sign is dependent on the individual driving the vehicle, or situations where the vehicle is assigned at the time of the call. You can customize the call signs to fit your specific agency. For example Medic 40 could be named M40, M-40, 40, etc.

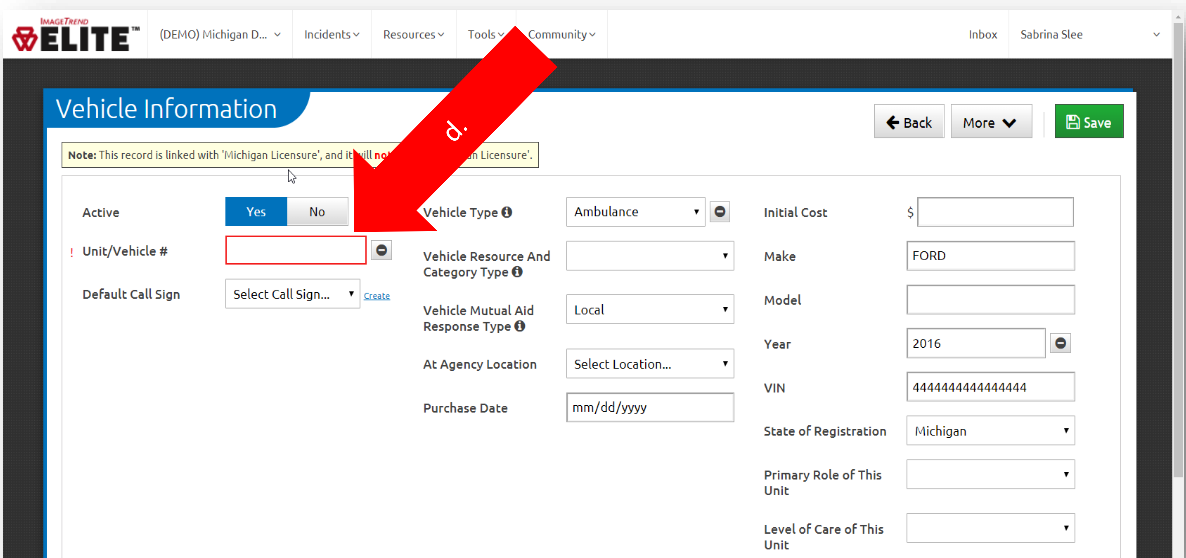
1. **Enter the Vehicle ID and Call Sign as follows:**
    a. Click on the "Resources" menu from the top of the screen
    b. Select Vehicles & Call Signs:



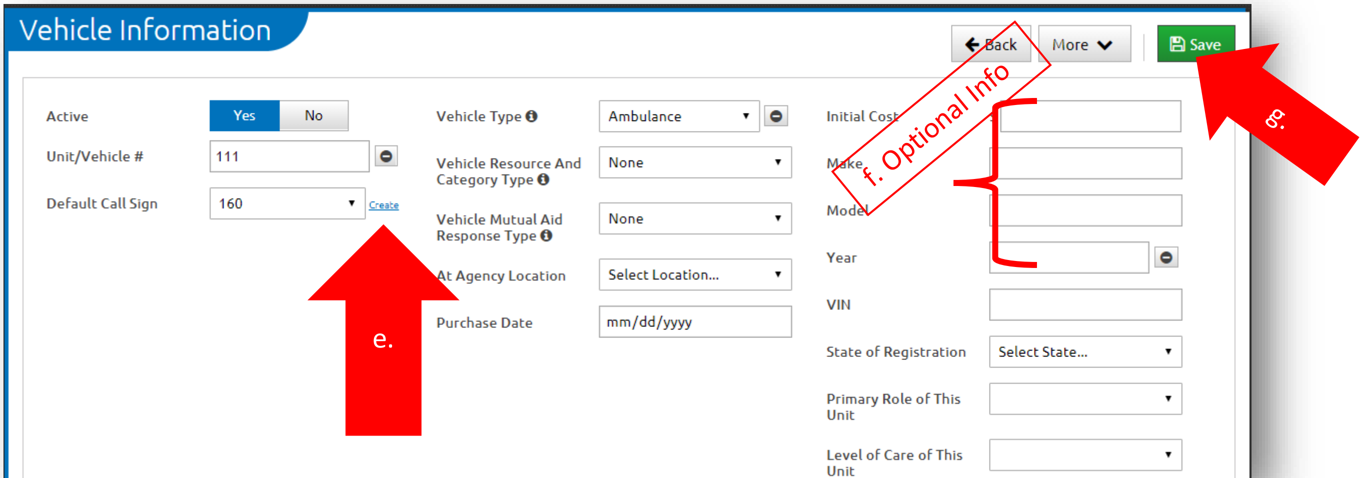
c. Double Click on the vehicle record to edit:



d. Enter the Vehicle ID in the Unit/Vehicle # field:



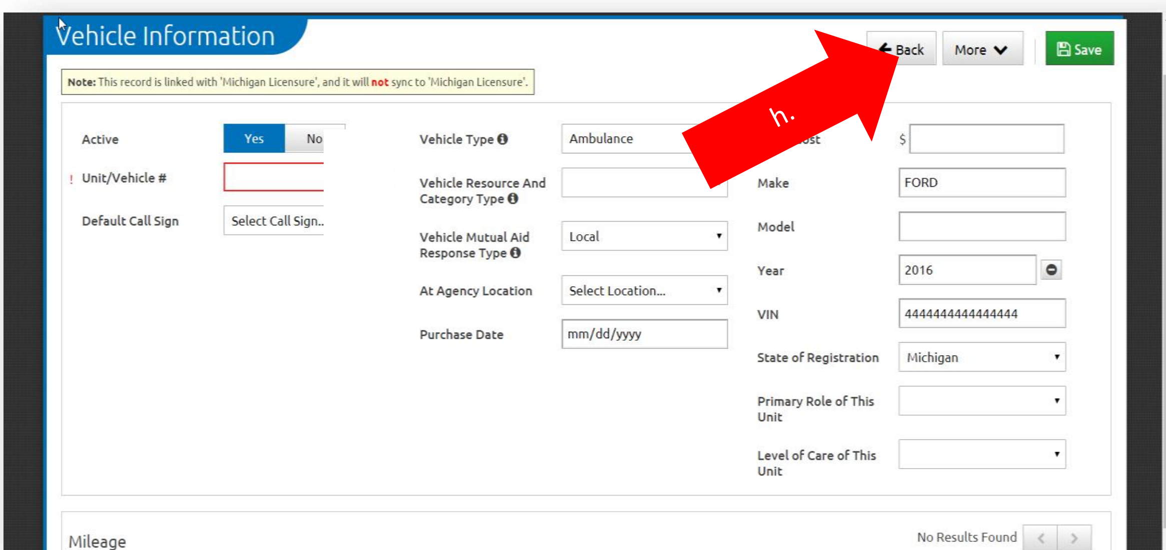
e. Enter a call sign by clicking the “Create” link for the Default Call Sign. If a vehicle has multiple call signs, additional call signs can be added by clicking the “Create” link again.



f. Optional:
  i. Enter Vehicle Model Information
  ii. Enter Initial Cost
  iii. Enter Annual Mileage information

g. Click the Save button

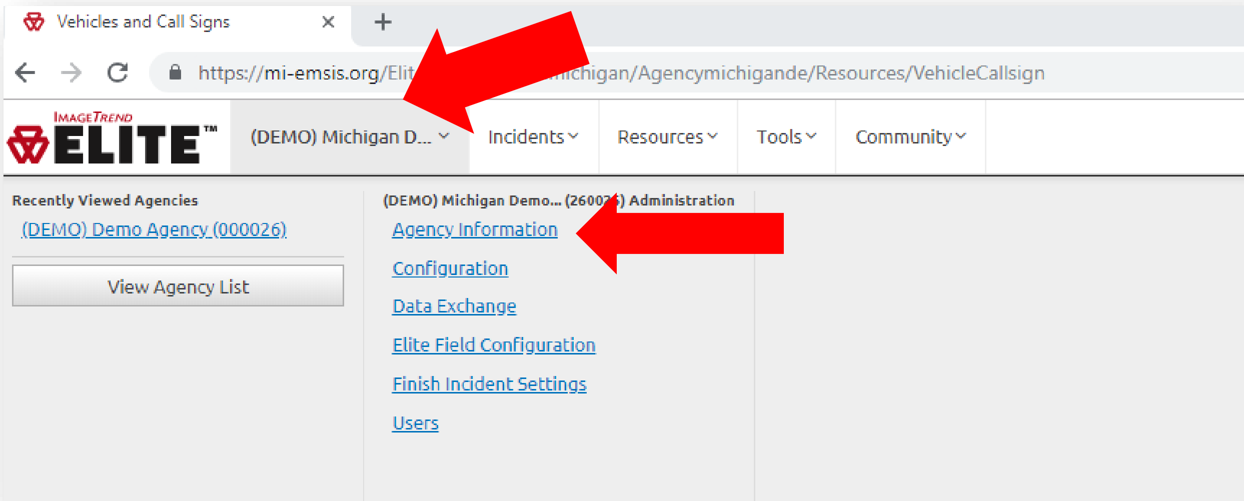
h. Click the Back button and repeat these steps for the rest of the vehicles.



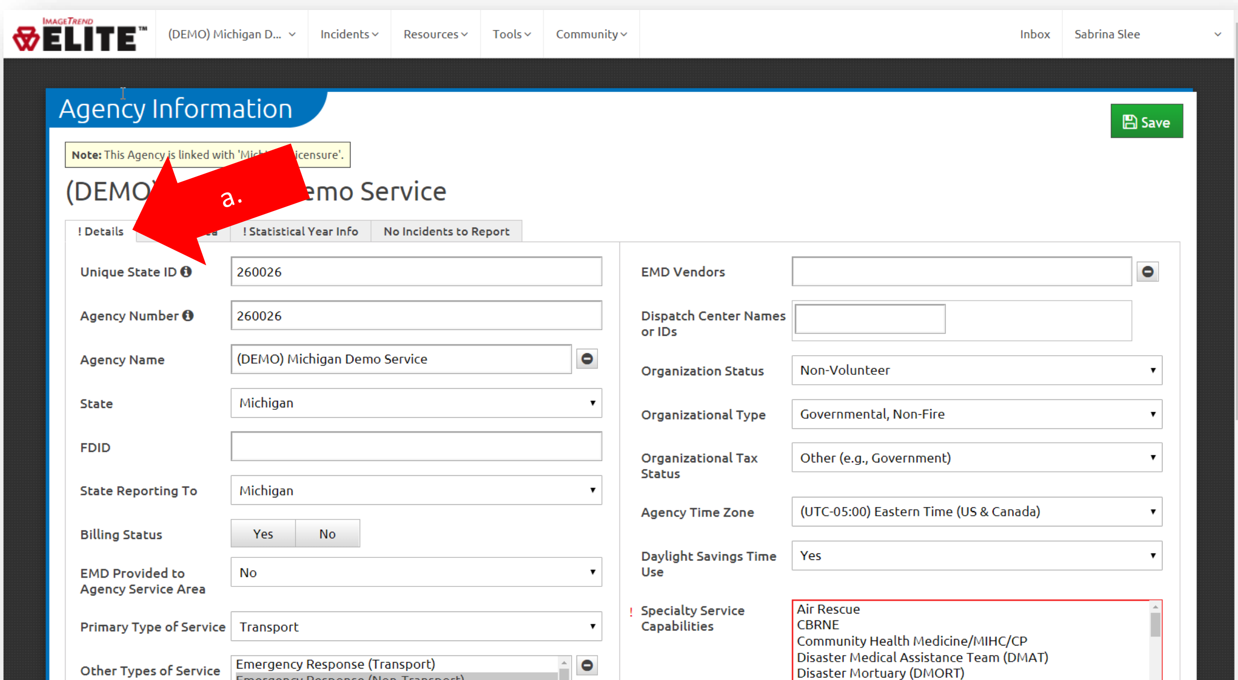
Note: Vehicle information does not sync from Elite to Licensure. When an agency is updated in Licensure, the vehicle information such as Unit Number and Call Sign will be overwritten in Elite and may need to be re-entered.

Optional Set-Up under Agency Information

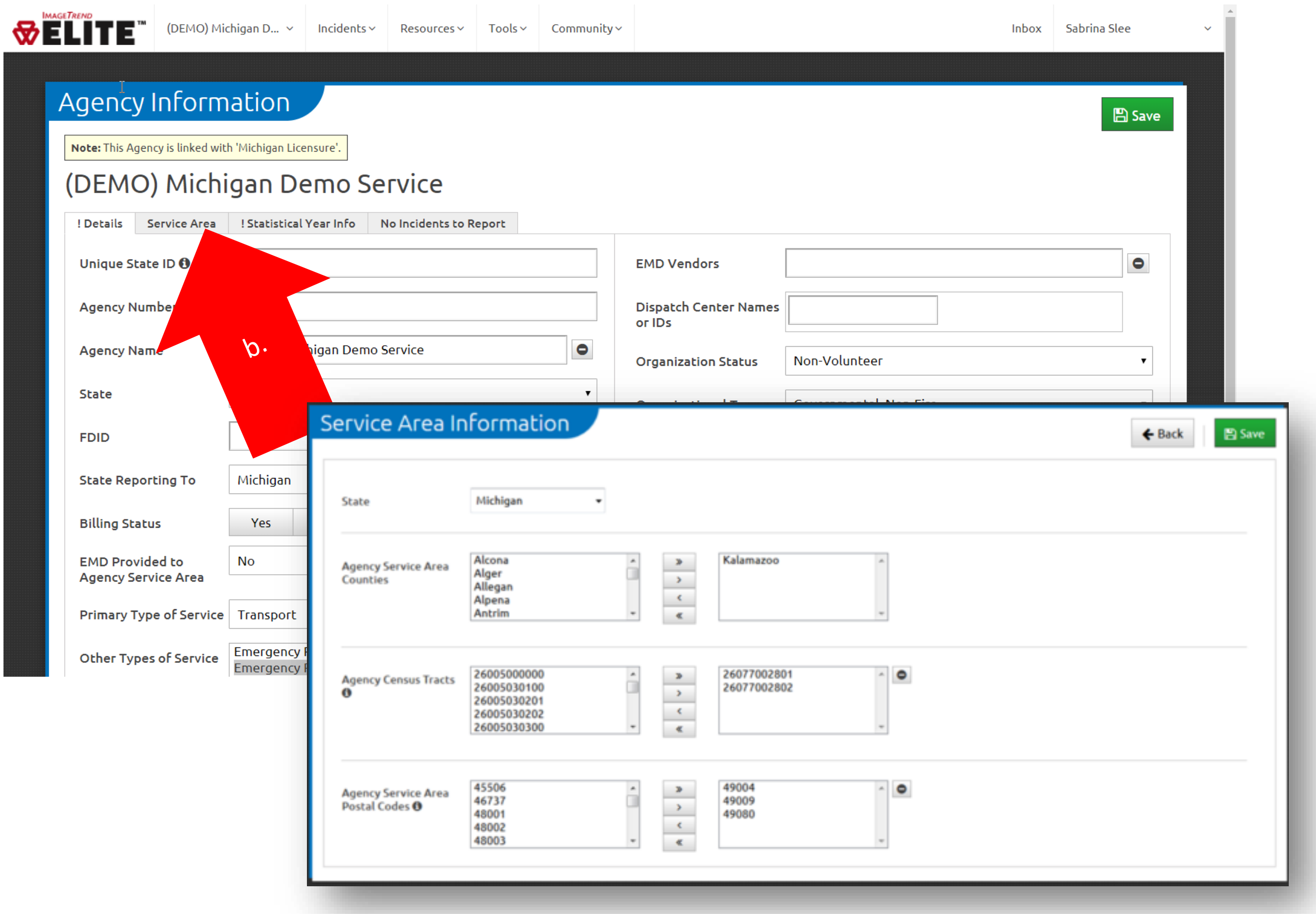
These screens are not mandatory to complete when setting up an agency, but they do provide additional information that may be beneficial for some reports and benchmarking.



a. Details Tab: can select more than one choice in Specialty Service Capabilities and Patient Monitoring Capabilities areas. Hold down the Ctrl button on the keyboard and click on the selections.

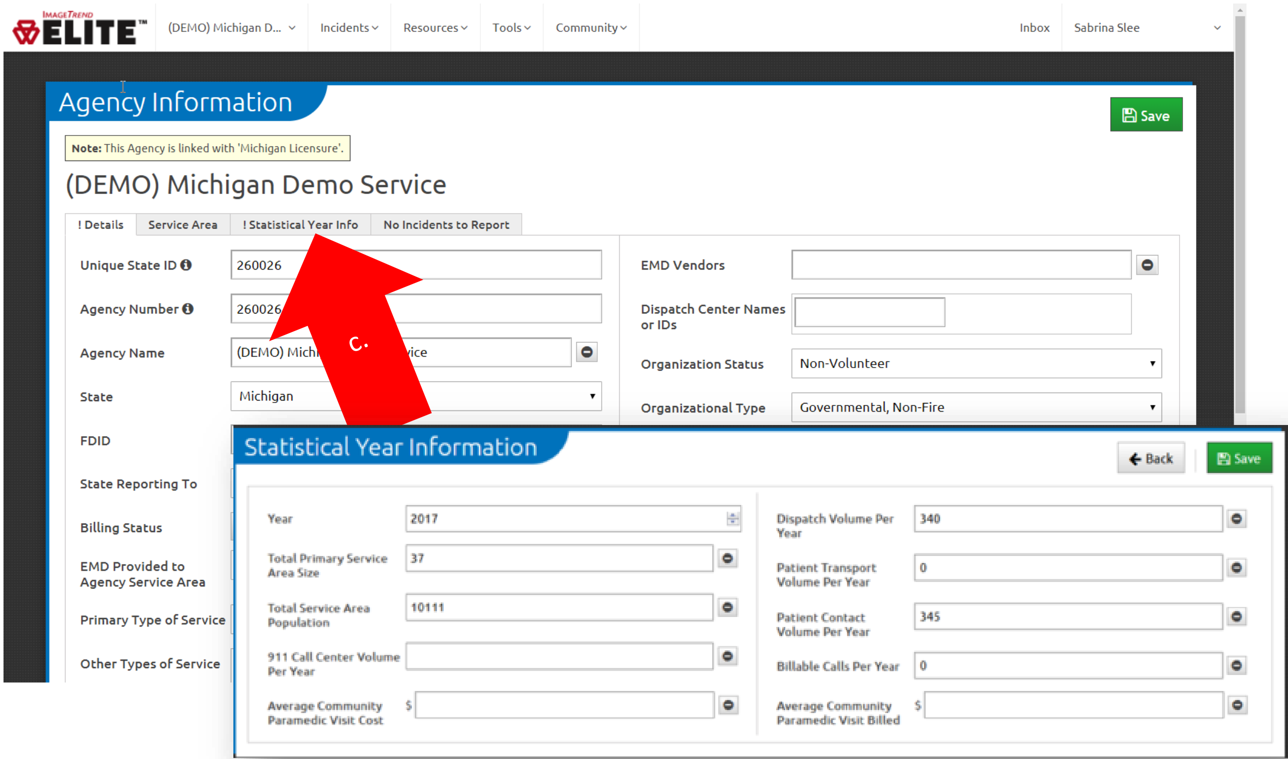


b. Service Area Tab**:** This section allows an agency to define their service area. Service Area contains state, county, postal codes and census tracts. NEMSIS has a tool at https://nemsis.org/media/ServiceAreaBuilder/ that will assist in determining this information by selecting or drawing a coverage area on a map. Given the nature of the interface, resulting details cannot be copied and pasted into Elite. The NEMSIS tool will allow the printing of the results which can be manually entered in to Elite.

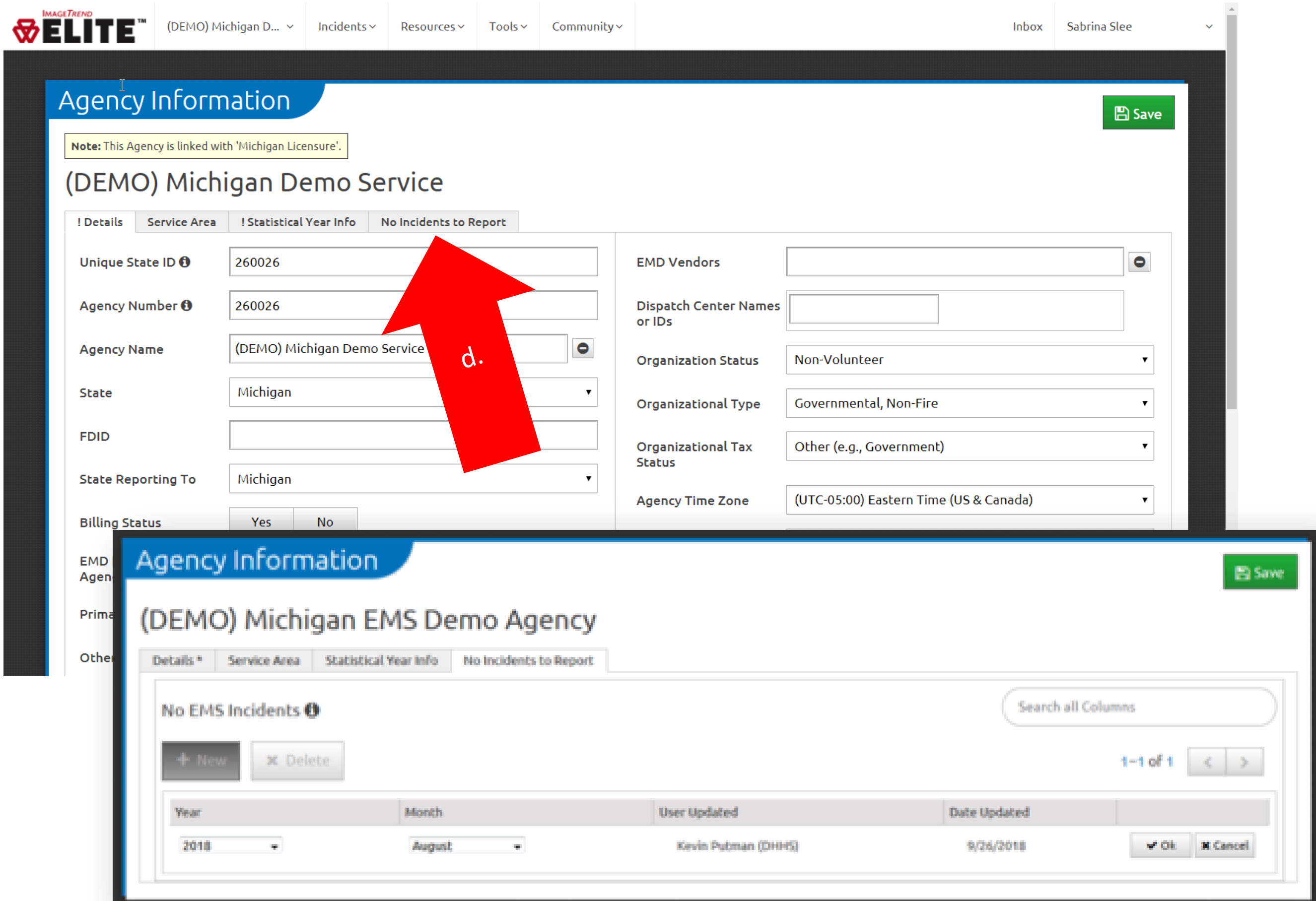


Note: If you choose census tracts from the ImageTrend database, they may not match up with the 2010 census tracts data base.

c. Statistical Year Information: This is beneficial for NEMSIS to be able to match a specific agency with comparable services across the Country for use in performance measure feedback. (Future development)



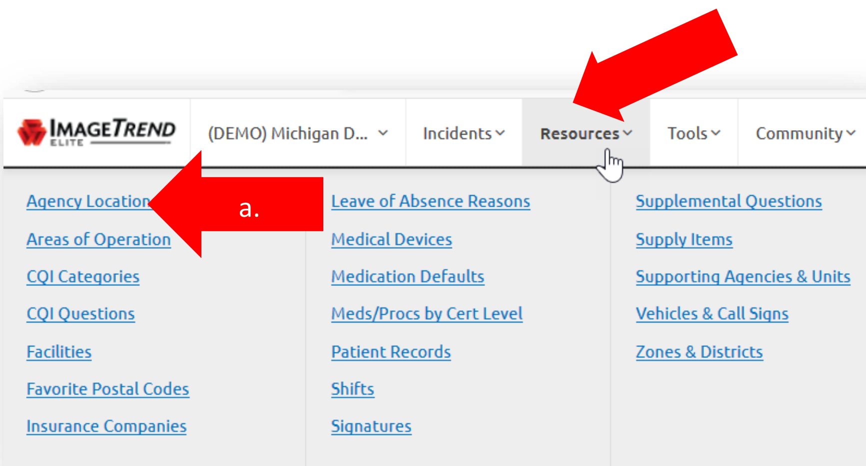
d. No Incidents to Report: This tab is very helpful to use if an agency has had no runs to report in a given month. It may prevent a call or question from the Division of EMS and Trauma trying to verify that there have been no calls vs. an agency just not reporting as they are required to do.



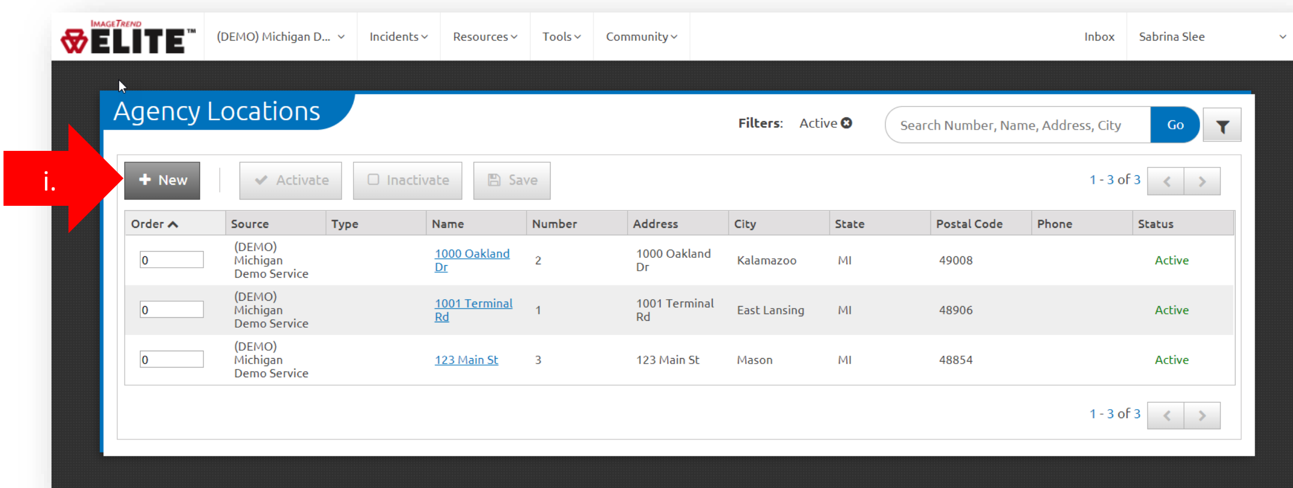
Optional Set-Up under the Resources Menu

These screens are not mandatory to complete when setting up an agency, but they do provide additional information that may be beneficial for some reports and benchmarking.

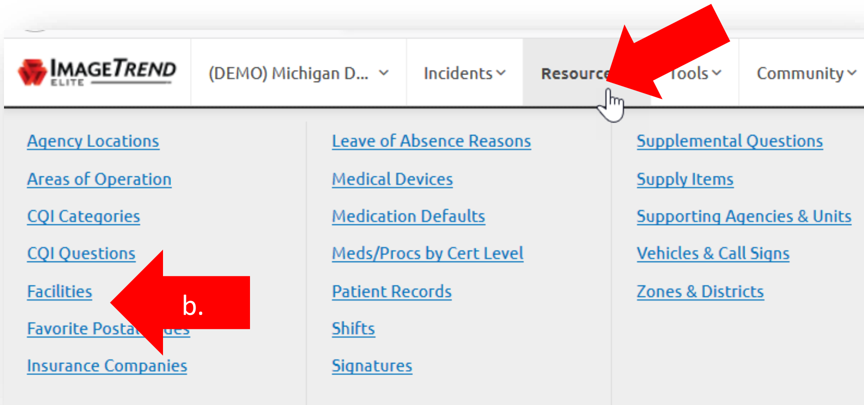
a. Agency Locations: This is where an administrator would enter vehicle staging locations, bases, or stations. Vehicle location information has already been populated from agency licensure information. Names of these locations may be updated to something that is more descriptive and unique. Additional locations may be added as needed.



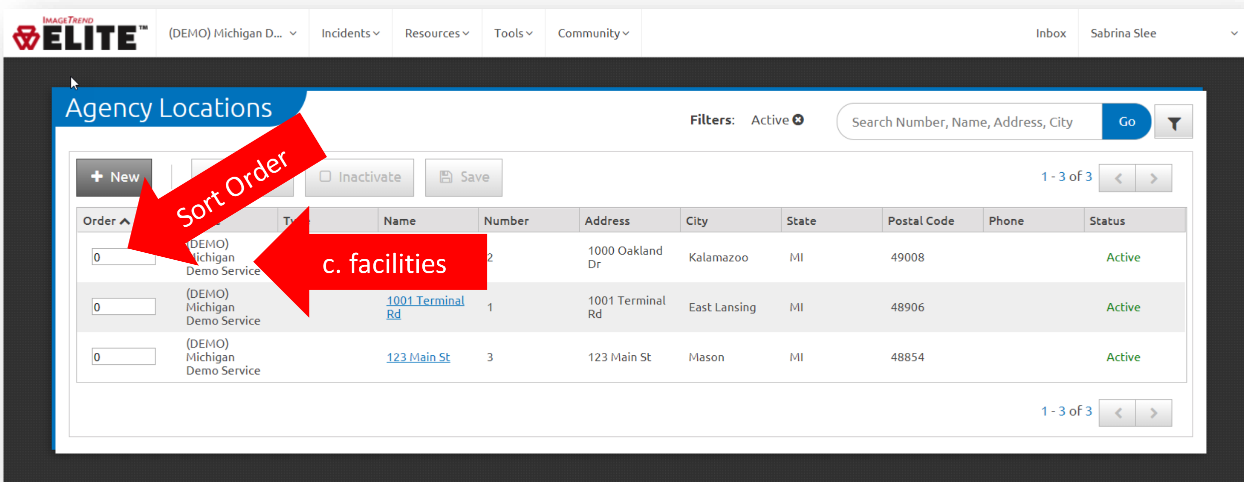
i. To add locations, Click on the +New button



b. <u>Facilities:</u> Here administrators can inactivate (hide) system level (State of Michigan Source) facilities to which the agency will never transport

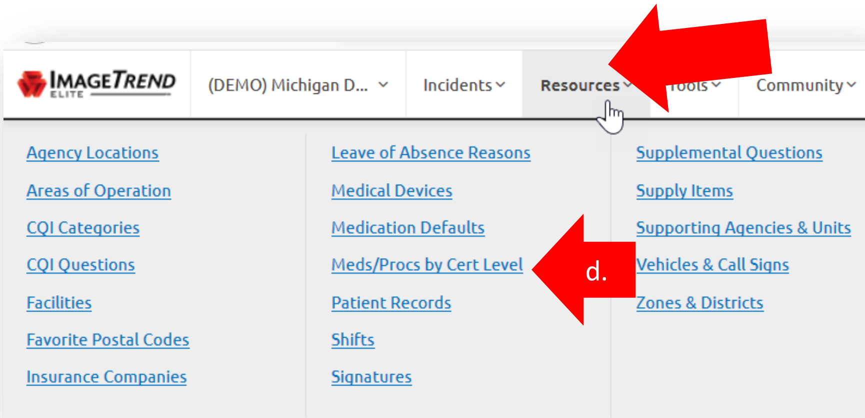


c. Common facilities to which the agency transports can be moved to the top of the list by changing the sort order to Zero.

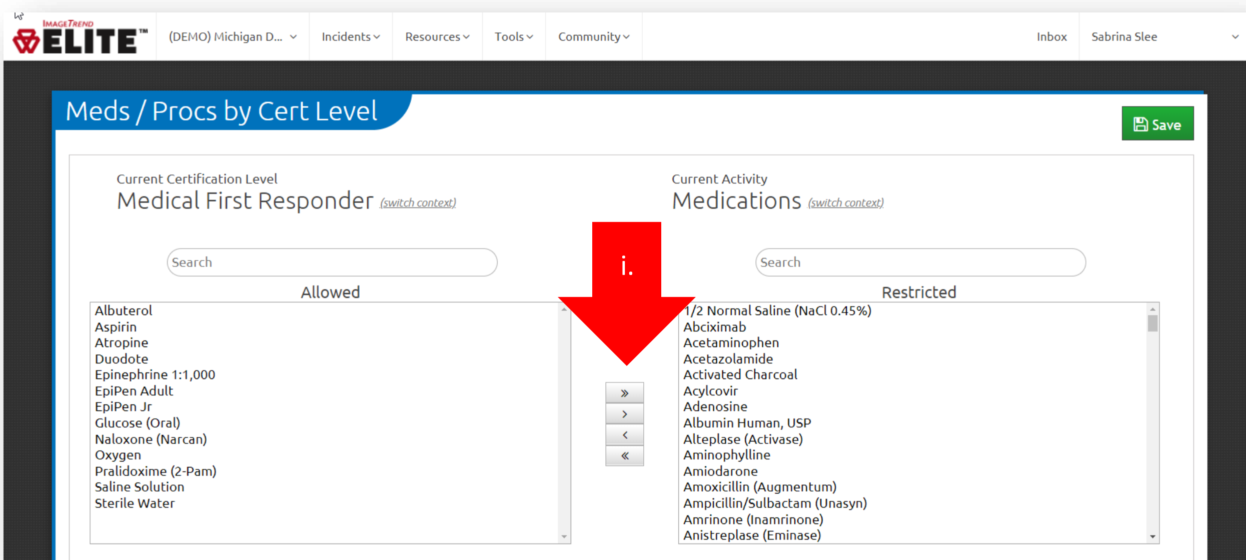


Important Note: Many locations have more than one entry in the system. For example, a hospital may have a long-term care unit, a drug treatment unit, and a psychiatric unit in addition to the main facility. This facility will be listed four times with the type of destination in parenthesis at the end of the destination name. Be sure to select the correct facility. **This is also a training point for your staff.**

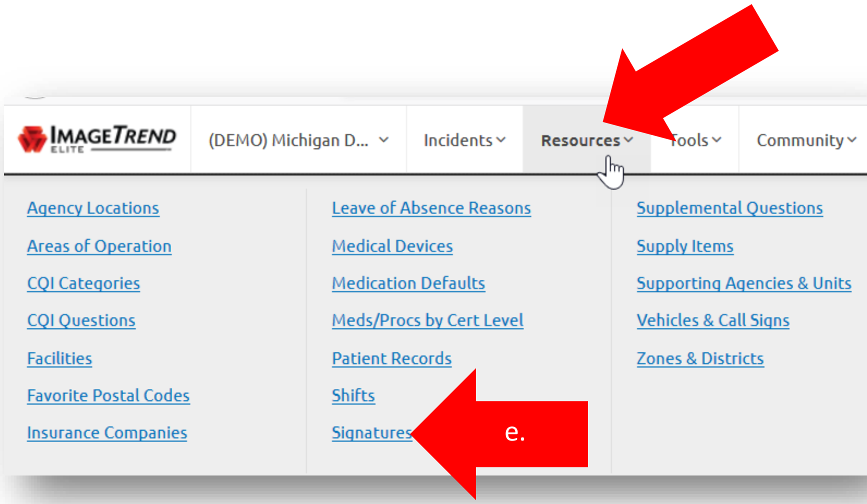
d. Medications/Procedure by Certification Level: This will allow administrators to add or remove medication or procedures by certification level. This has already been defaulted to the State list based on state protocol. However, if the agency has a protocol exception or is part of a special study, this may need to be modified.



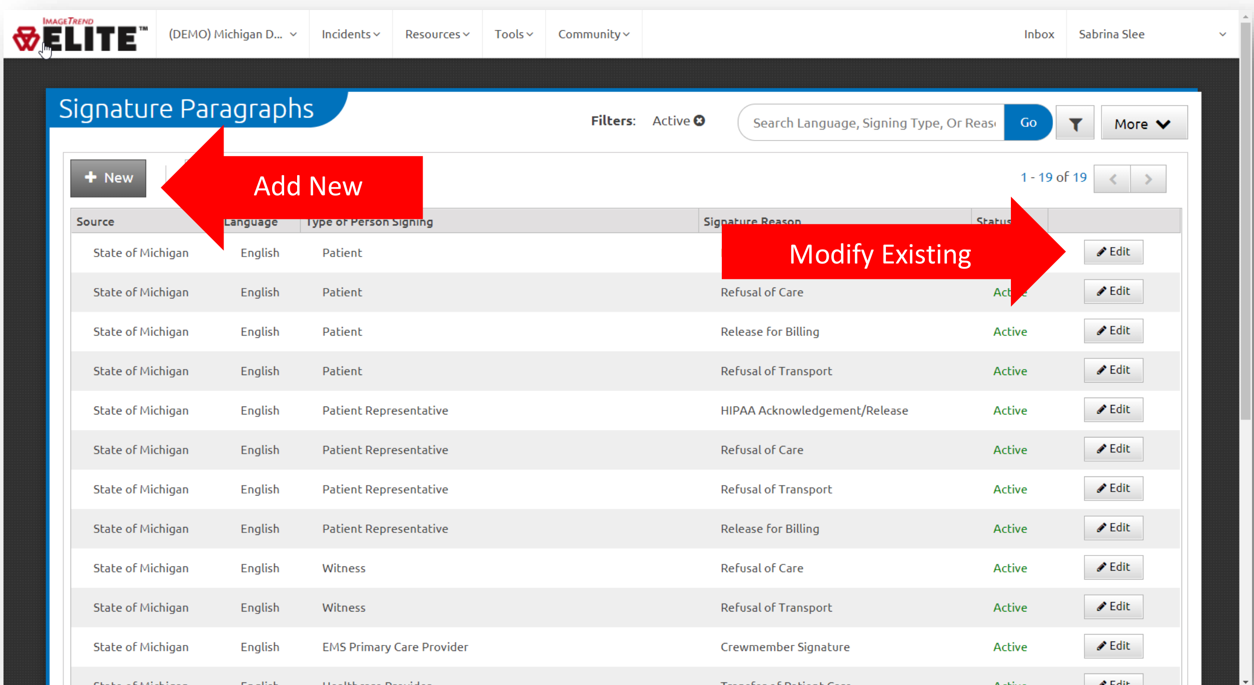
i. Select a medication by clicking on it, and use the toggle buttons in the middle to place the medication in the correct category of Allowed or Restricted.



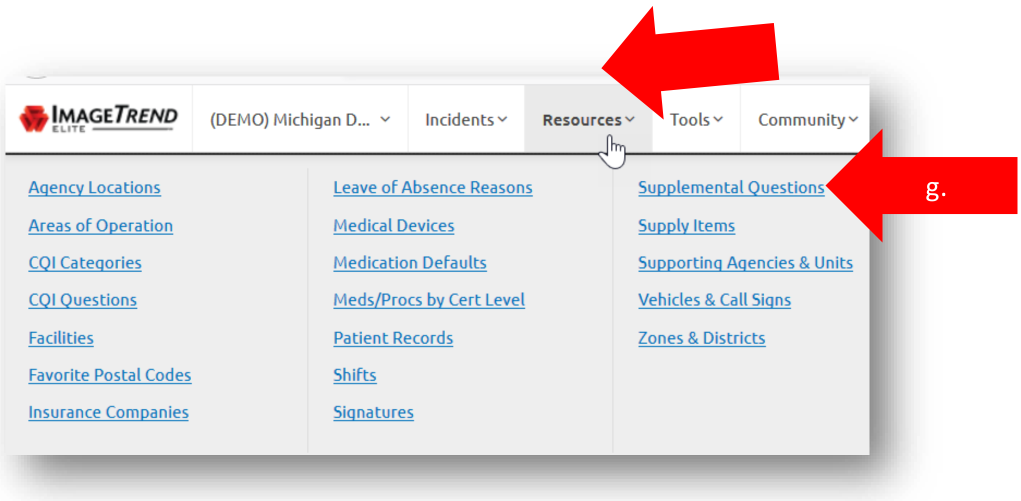
e. Signatures: This is where the text for signatures appears by type of person signing and reason for signature. There are some generic signatures that were brought over from State Bridge. However, the list is not complete.



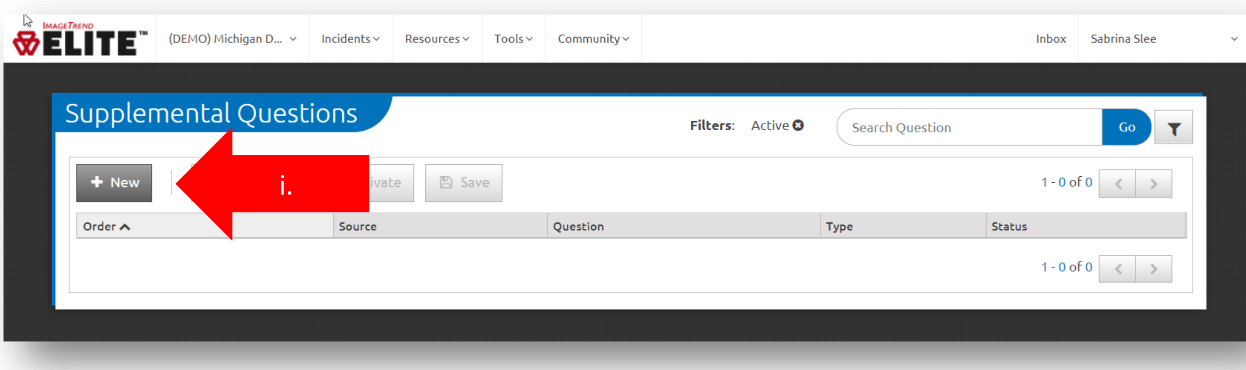
f. In many cases an agency is using language that has been approved by its legal counsel. Administrators can update the signature text to suit the agency's needs by clicking on the appropriate spots as indicated below.



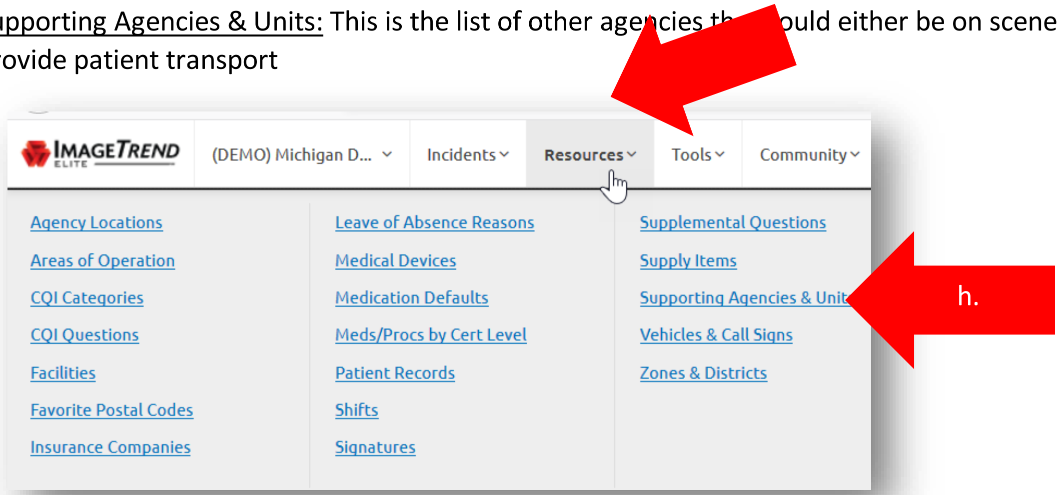
g. Supplemental Questions: This section allows for the creation of additional questions for information an agency may wish to capture that is not part of the current run form. This was previously known as Service Defined Questions in State Bridge. More information on question design can be obtained through Help/University.



i. Click the +New button to add new questions.

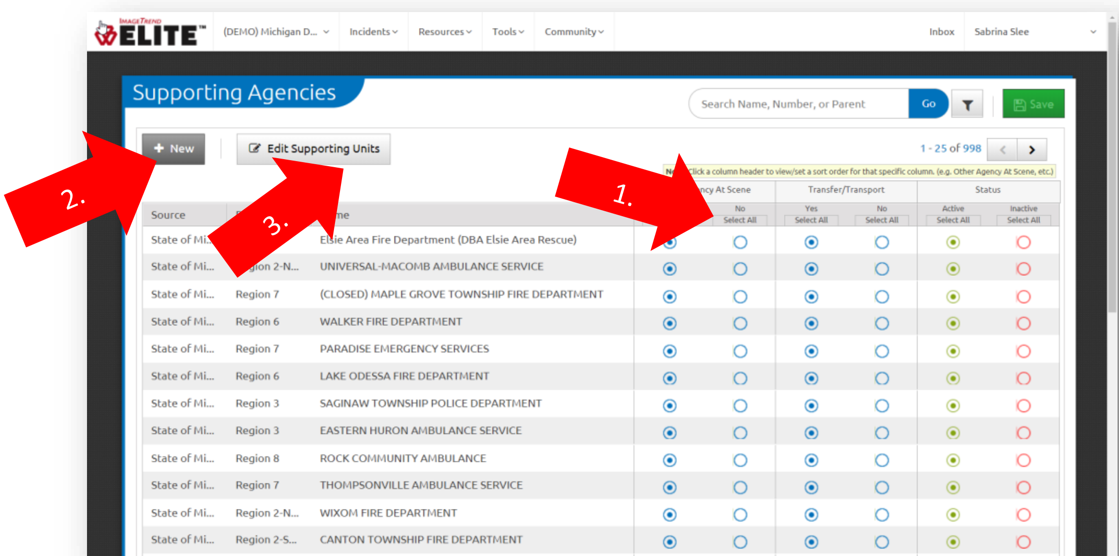


h. Supporting Agencies & Units: This is the list of other agencies that could either be on scene or provide patient transport

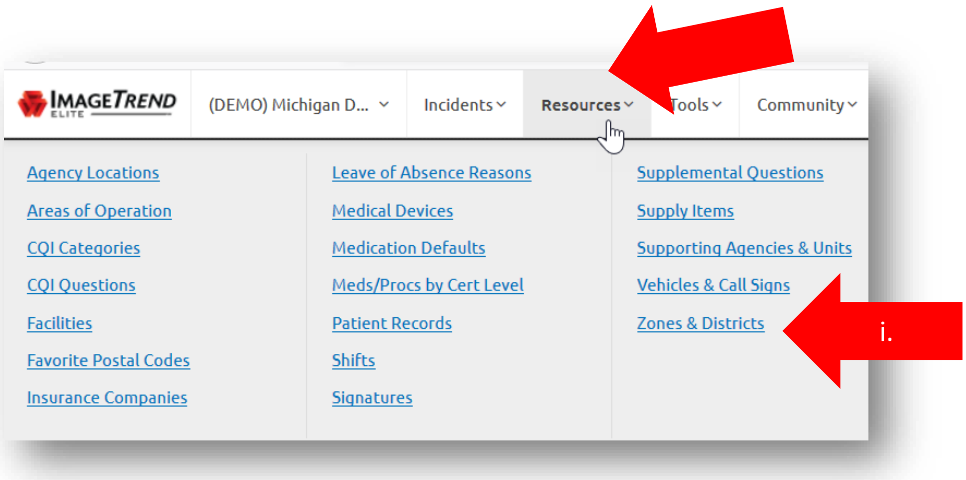


i. By default, every EMS Agency in License Management is set to “Yes” for Other Agency at Scene, “Yes” for Transfer/Transport, and Active for Status.

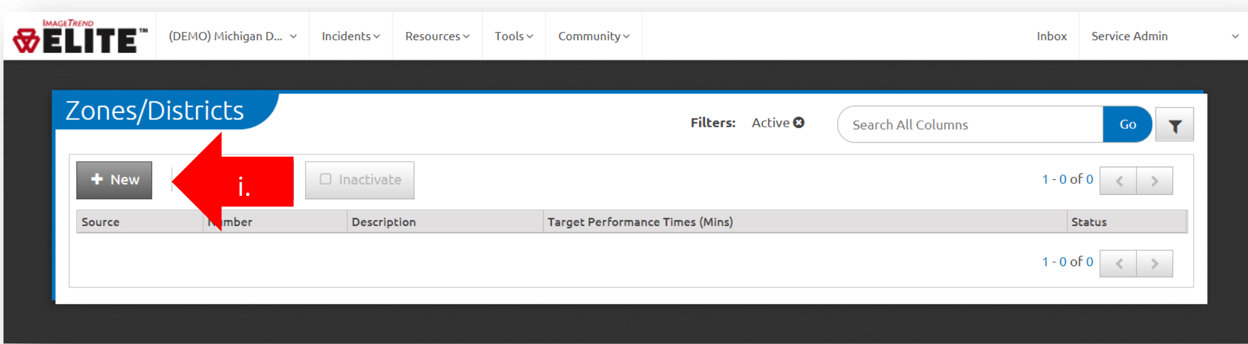
1. Administrators can select the agencies in their area that they interact with on a regular basis. The quickest method to accomplish this is to inactivate all agencies, then reactivate the desired agencies.
2. Additional non-licensed agencies such as law enforcement or fire departments may be added.
3. The Supporting Units can be accessed by clicking the Edit Supporting Units button. This list is more generic in nature listing only the type of unit that was supporting rather than the agency.



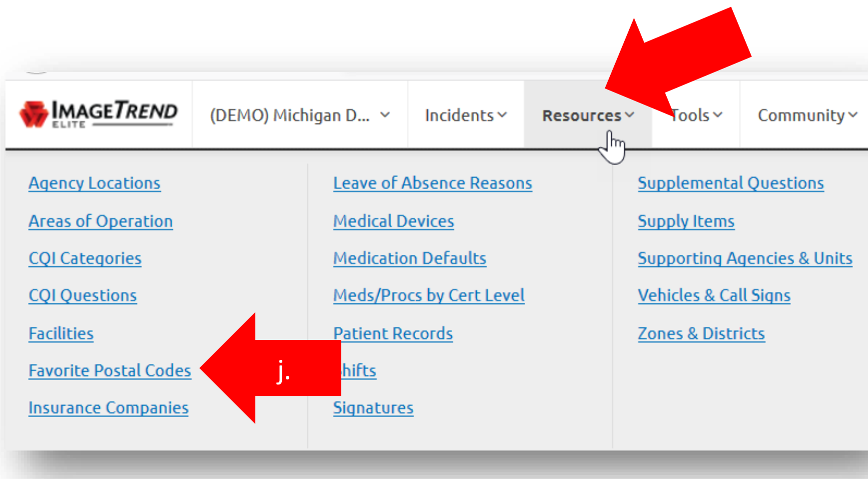
i. Zones & Districts: This area is agency specific and has no values populated from the state.



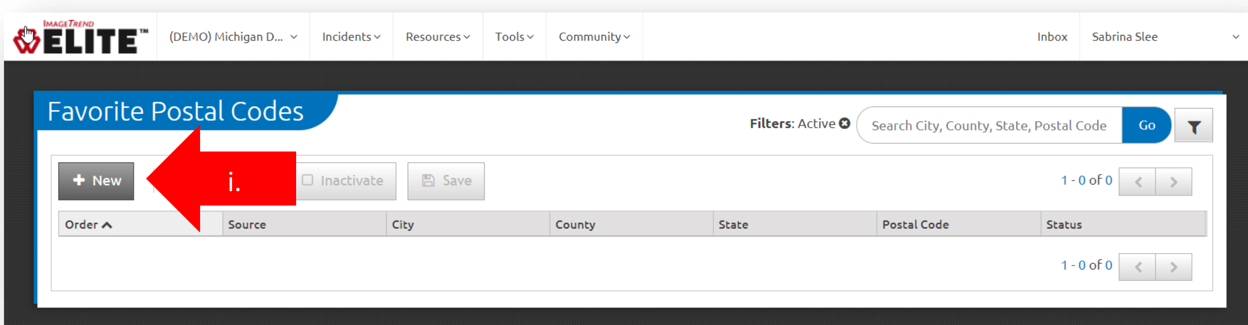
i. If you have a need to further classify the location of the incident, this is where you would setup those zones by clicking the +New button.



j. Favorite Postal Codes: These are the only postal codes that will cache for Elite Field when operating offline.

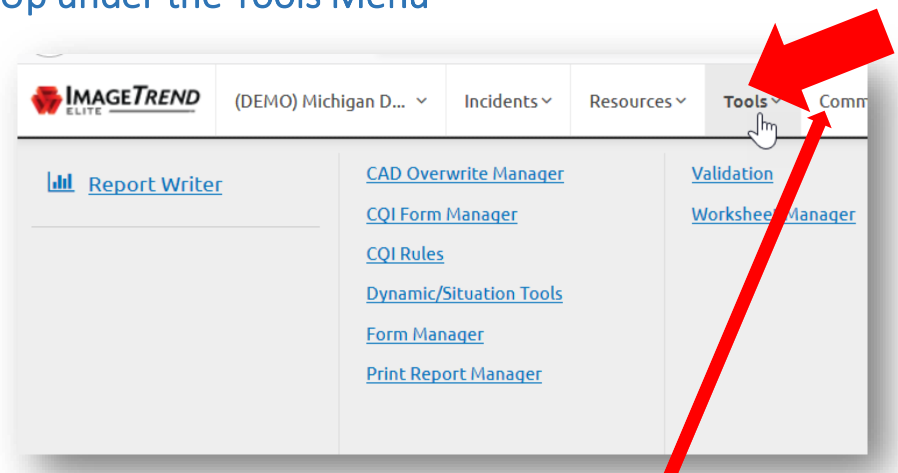


i. An agency can add as many postal codes as desired. It is recommended that if an agency intends on using Elite Field, that they populate ALL of their coverage area postal codes and those surrounding the primary coverage area. Unfortunately, these can only be added one at a time



There are other settings under the Resources tab that agencies may also find useful. They can also be modified, such as Medical Devices and Shifts. These additional settings are also optional. More information for all of the Resources settings can be found in Help/University

<u>Optional</u> Set-Up under the Tools Menu



Note: To learn more about the tool listed below, please go to the

Located under the Community Tab

a. <u>CQI Form Manager and CQI Rules:</u> These settings are for the CQI features that are built into Elite. These are a little on the advanced side. For more information on the CQI Module, select Help/University from the Community menu.

b. <u>Dynamic/Situation Tools:</u> This is section is for creating or activating/inactivating customized power tools that can be added to the EMS run forms. A power tool allows quick access to document common tasks without having to locate them on the main form. More information can be found in Help/University.

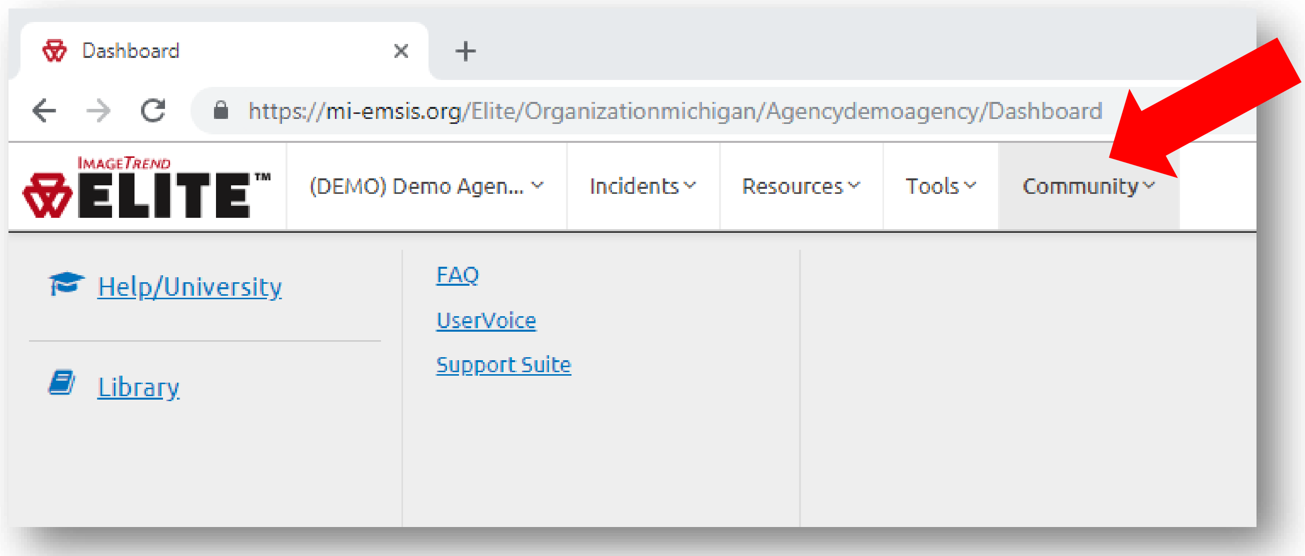
c. <u>Form Manager:</u> This tool allows for the creation of agency specific run forms, activate/inactivate run forms, and copy existing run forms. There are some benefits to having this ability. For example, if the desire exists to capture information that is not on the State form, it may be possible that ImageTrend already has created custom elements for this purpose. There are very few of these ImageTrend elements on the state form, as it is difficult to collect this information from non-ImageTrend agencies.

   If an agency wishes to add any fields, Supplemental Questions (Service Defined Questions in State Bridge), or set any defaults for fields, the Michigan EMS run form can be copied to perform these tasks. More information of the Form Manager can be found in Help/University.

d. Print Report Manager: This tool is used to create or modify the printed PCRs. More information on the Print Report Manager can be found in Help/University.

e. Worksheet Manager: This tool allows for the creation of supplemental worksheets that can accompany a PCR. This is similar to “Supplemental Questions”, except that the questions do not need to appear on the run form or the PCR. This is ideal for capturing data related to special studies or information that is not patient care related. Multiple worksheets can be created and any number of them can be added to a PCR. When a crew encounters a qualifying patient, it can add the worksheet to that specific patient record. More information on the Worksheet Manager can be found in Help/University.

Other Helpful Resources located under the “Community” Menu



a. Help/University: Help/University should be utilized first for users who have questions on ImageTrend Elite. The system is covered in detail with images, videos, text, and tips.

b. Library: The Library is a resource sharing site that ImageTrend has created based on user interactions with the system. This tool lets an administrator import or publish EMS Worksheets, EMS Forms (run forms), EMS Print Reports, and Dynamic Power Tools that any other ImageTrend user across the country has created. In essence, this tool shares best practices from users and saves time for those looking to utilize similar tools.

c. FAQ: ImageTrend has listed the most frequently asked questions to help users save time searching through content.

d. UserVoice: Uservoice is a forum for users to post ideas and suggestions to improve ImageTrend Elite. ImageTrend uses this feedback when making changes to the system to improve the ImageTrend Elite platform.

e. Support Suite: This is ImageTrend's support/helpdesk site where users can report problems that they may be experiencing directly to ImageTrend. It is the same as sending an email to support@imagetrend.com.

Please contact Kevin Putman using the information below for any further questions, concerns, comments, or suggestions.

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