

ImageTrend Elite Agency Setup Guide

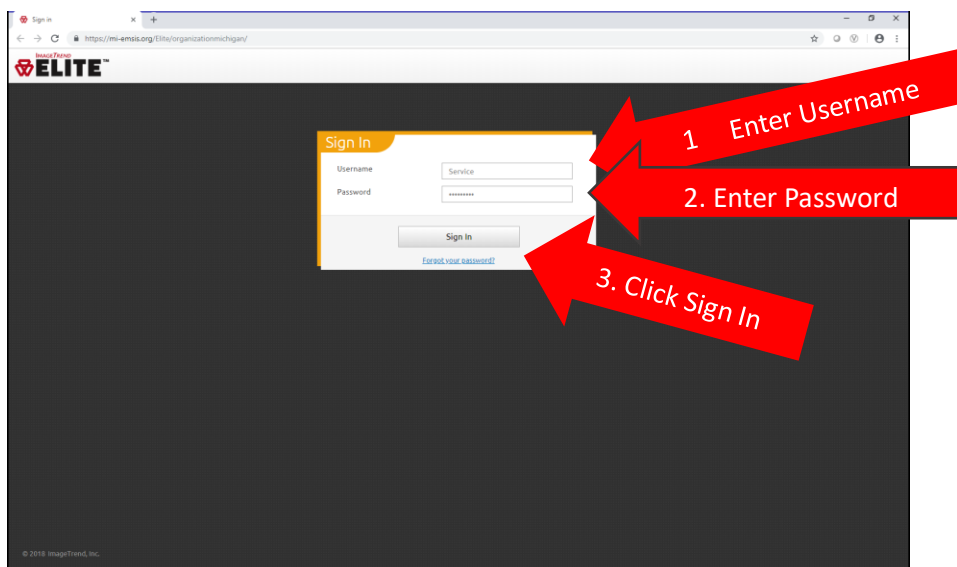
Welcome to the Michigan ImageTrend Elite Agency Portal. The Department makes this portal available to all licensed EMS agencies to simplify and streamline the data collection process. This setup guide will provide instructions for setting up your EMS agency in the Elite Portal to begin entering data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

The setup guide is broken down into 6 parts:

- Getting Started
- Adding Staff to an Agency
- Vehicle Setup for your Agency
- Optional Setup under the Agency Information Menu
- Optional Setup under the Resources Menu
- Optional Setup under the Tools Menu
- ImageTrend Community

Getting Started

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

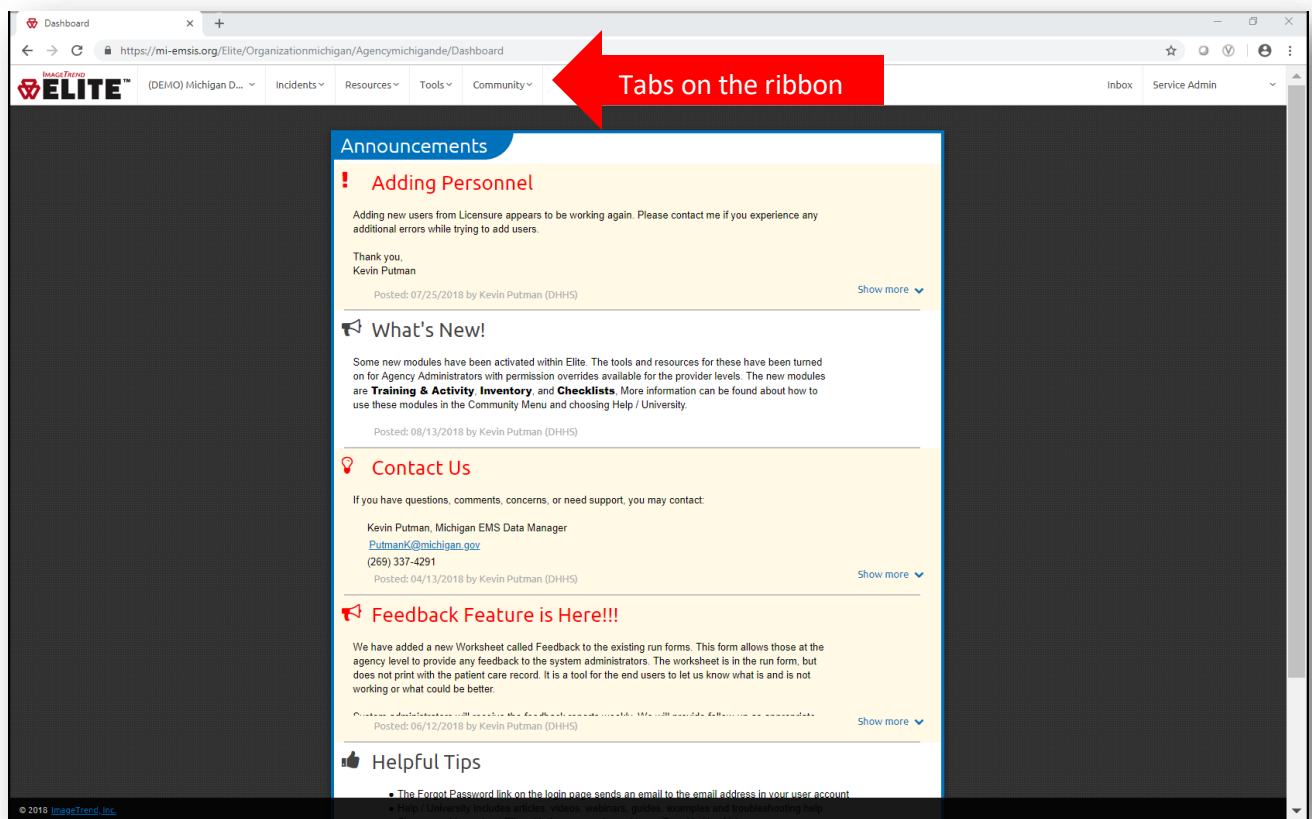


- 2) A user's EMS eLicensing Portal (<https://www.mi-emsis.org/licensure>) login credentials are the same credentials used to log into Elite for all associated agencies.

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.

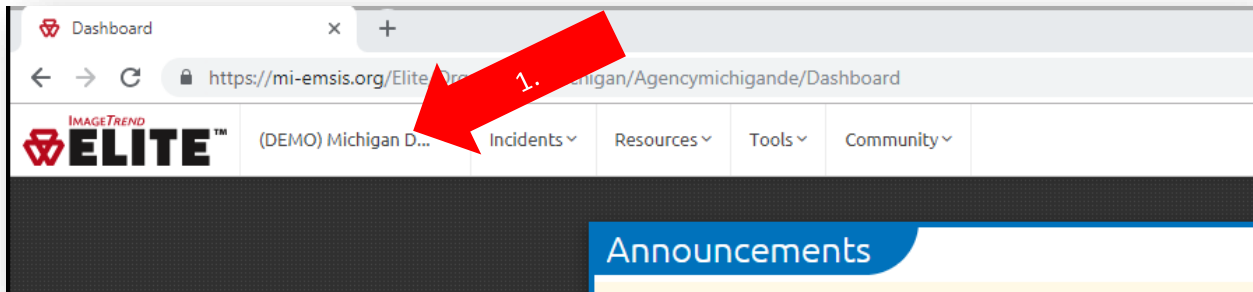
Adding Staff to an Agency

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.

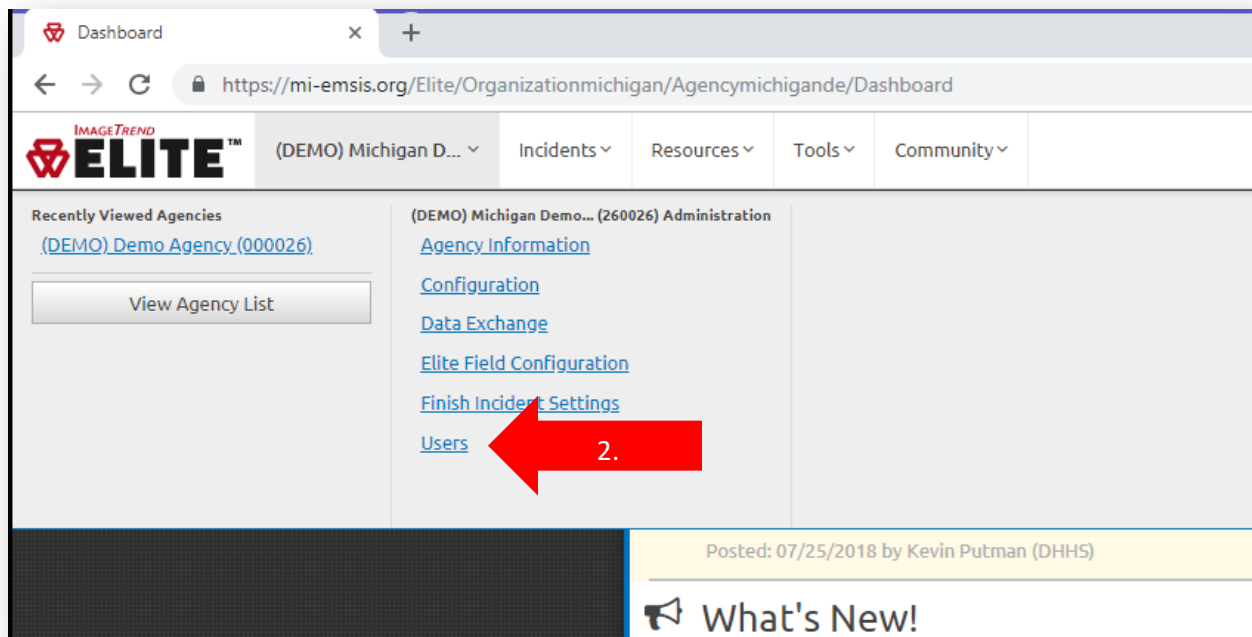


To Add Staff

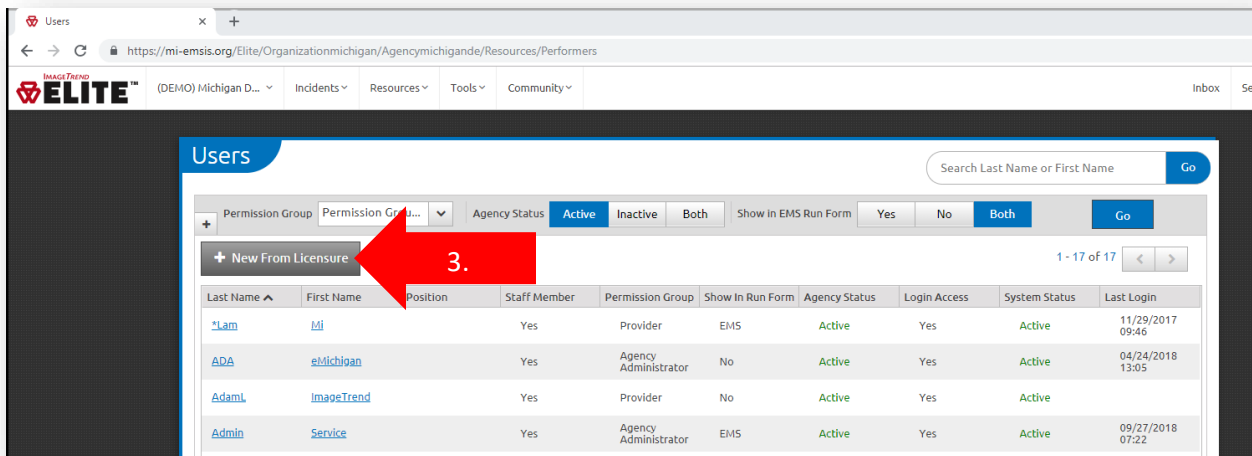
1. Click on your agency name in the upper left-hand corner.



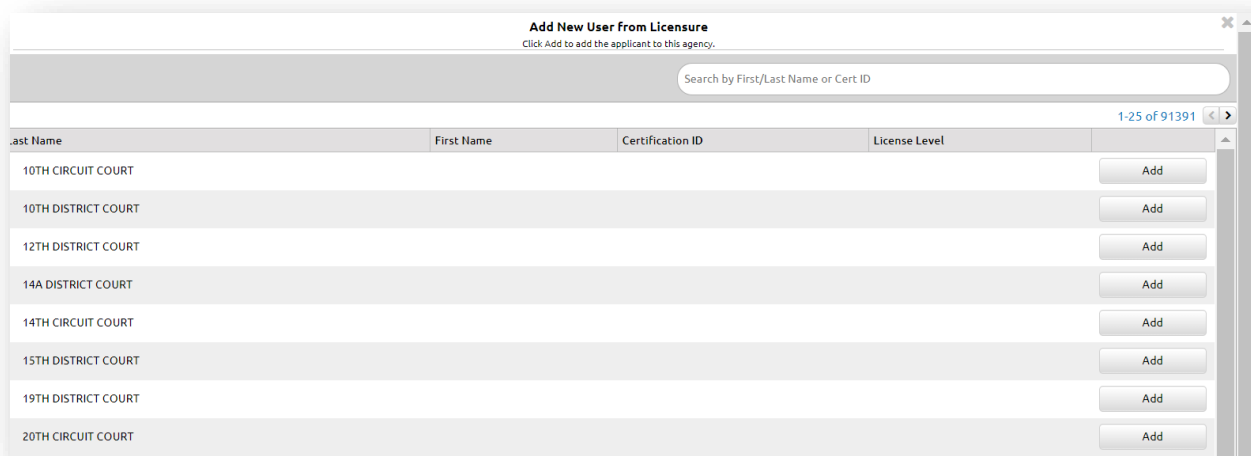
2. Select Users from the menu



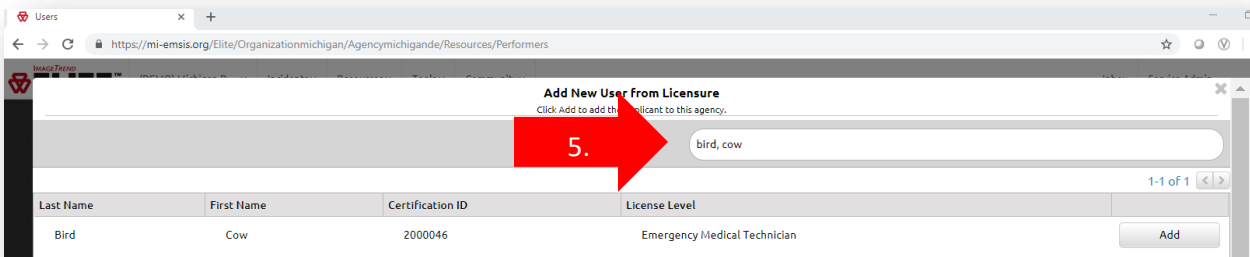
3. This screen will appear. Click +New from Licensure button.



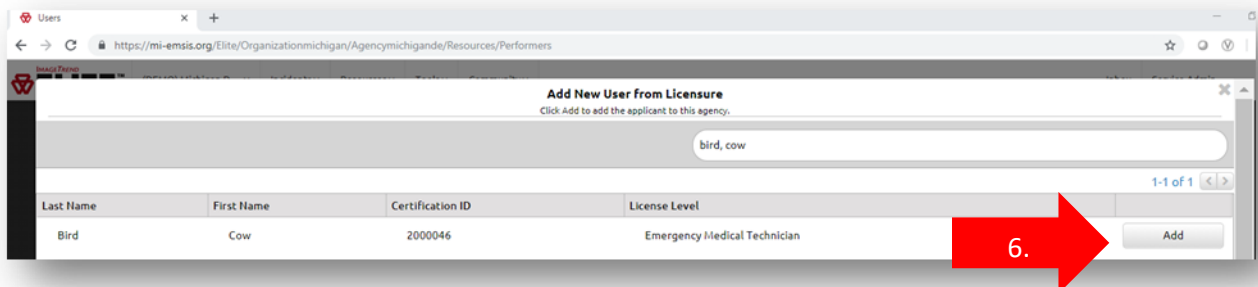
4. This screen will appear and contains all entities that are in the Licensure module. Do not be surprised to see Courts or education programs etc.



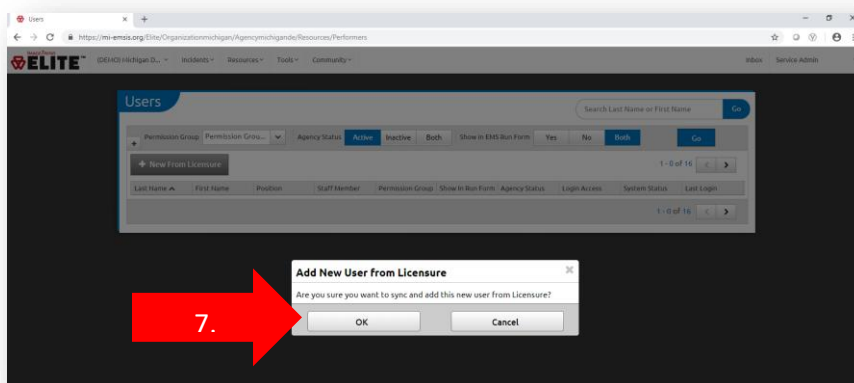
5. To avoid scrolling through all of the providers, enter the provider's last name or the new license number in the search box.



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

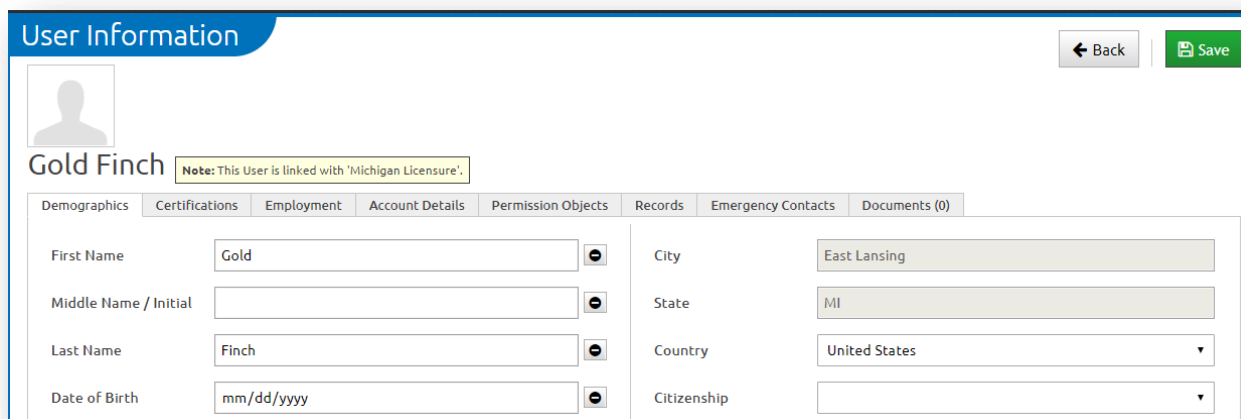


7. The system will then ask if you want to add the new user from Licensure. Click OK.



Permissions

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



The screenshot shows the 'User Information' form for a user named 'Gold Finch'. The form has a blue header with the title 'User Information' and two buttons: 'Back' and 'Save'. Below the header is a profile picture placeholder and the user's name 'Gold Finch'. A note indicates 'This User is linked with 'Michigan Licensure''. The form is divided into several tabs: Demographics, Certifications, Employment, Account Details, Permission Objects, Records, Emergency Contacts, and Documents (0). The 'Demographics' tab is active, showing fields for First Name (Gold), Middle Name / Initial, Last Name (Finch), Date of Birth (mm/dd/yyyy), City (East Lansing), State (MI), Country (United States), and Citizenship.

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.

The screenshot shows the 'User Information' form for a user named 'Gold Finch'. The 'Account Details' tab is selected, and a red arrow labeled '1.' points to it. The form includes fields for First Name (Gold), Middle Name / Initial, Last Name (Finch), Date of Birth (mm/dd/yyyy), City (East Lansing), State (MI), Country (United States), and Citizenship. A note states: 'Note: This User is linked with 'Michigan Licensure'.'

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

The screenshot shows the 'User Information' form for a user named 'EMILY BERGQUIST'. The 'Permission Objects' tab is selected, and a red arrow labeled '2.' points to the 'Permission Group' dropdown menu, which is currently set to 'Provider'. The form includes fields for User ID (ebergquist), Password Requirements (Minimum password length of 8 characters, Must have a numeric character, Must have an uppercase character, Must have a special character, Cannot match any of the last 5 password(s) you have used, Password cannot be the same as the username), Password (masked with dots), Verify (masked with dots), Cancel, Password Require Reset (checkbox), Email Notification of All Login Access Inactivations (Inactive), Agency Status (Active/Inactive), System Status (Active), Login Access (Yes), Last Login, and User Agencies (User Agencies button).

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

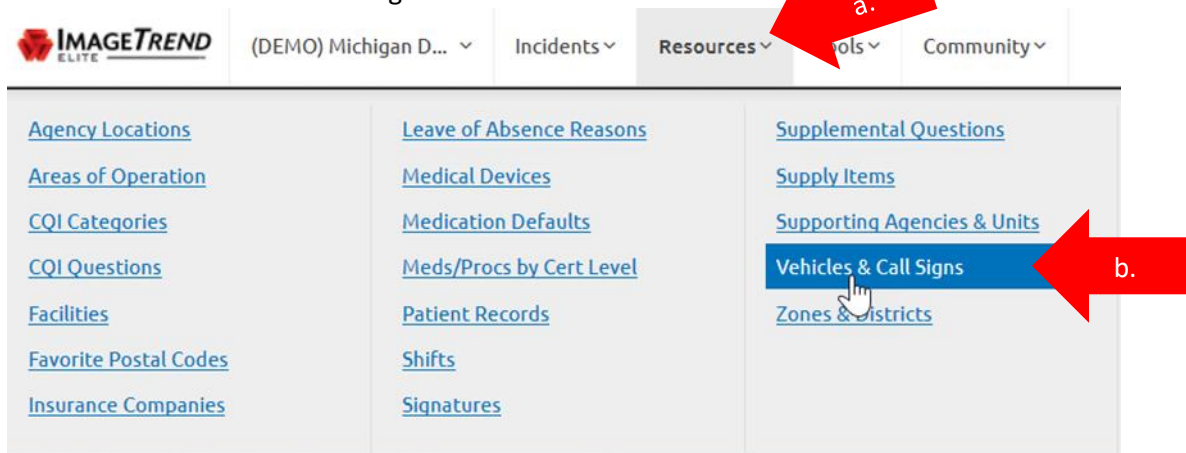
It is recommended that the Vehicle ID be unique to the vehicle and not match the call sign. This is particularly important if the call sign of the vehicle may change over the course of ownership. If assigning unique Vehicle IDs is not common within the agency, a good practice is to use the last four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

Call Signs

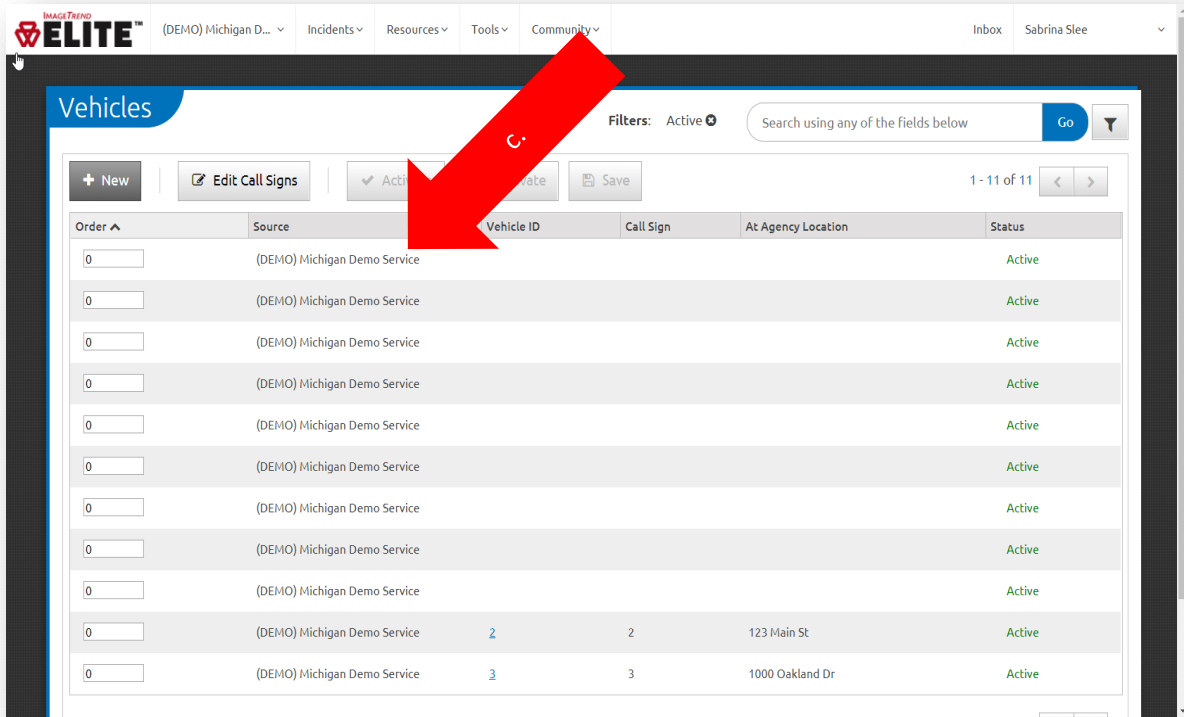
Call signs are no longer tied to a single vehicle. This is beneficial for those agencies where the call sign is dependent on the individual driving the vehicle, or situations where the vehicle is assigned at the time of the call. You can customize the call signs to fit your specific agency. For example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

1. Enter the Vehicle ID and Call Sign as follows:

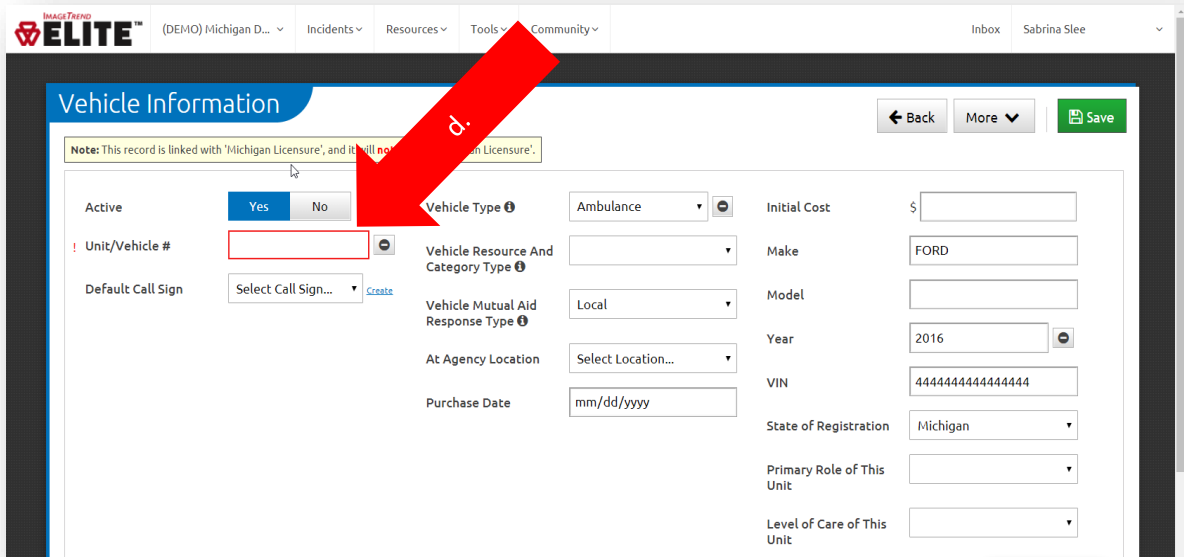
- a. Click on the “Resources” menu from the top of the screen
- b. Select Vehicles & Call Signs:



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.

The screenshot shows the 'Vehicle Information' form. A red arrow labeled 'e.' points to the 'Create' link next to the 'Default Call Sign' dropdown menu. Another red arrow labeled 'f. Optional Info' points to a bracketed group of fields including 'Initial Cost', 'Make', 'Model', 'Year', 'VIN', 'State of Registration', 'Primary Role of This Unit', and 'Level of Care of This Unit'. A third red arrow labeled 'g.' points to the 'Save' button in the top right corner.

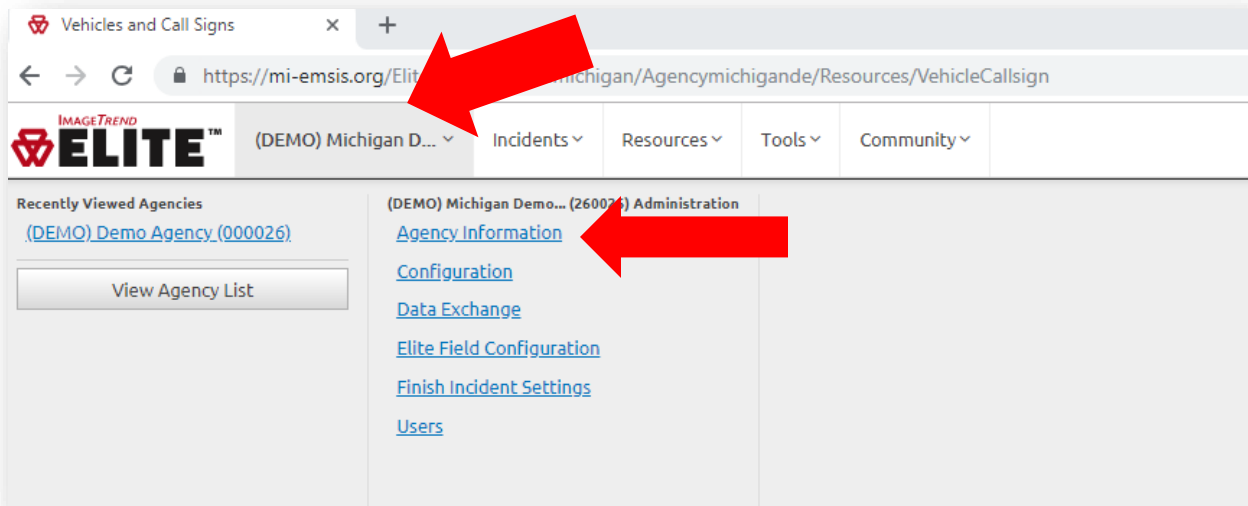
- f. Optional:
- Enter Vehicle Model Information
 - Enter Initial Cost
 - Enter Annual Mileage information
- g. Click the Save button
- h. Click the Back button and repeat these steps for the rest of the vehicles.

The screenshot shows the 'Vehicle Information' form with a note at the top: 'Note: This record is linked with 'Michigan Licensure', and it will not sync to 'Michigan Licensure''. A red arrow labeled 'h.' points to the 'Back' button in the top right corner. The form fields are populated with example data: 'Unit/Vehicle #' is empty, 'Default Call Sign' is 'Select Call Sign..', 'Vehicle Type' is 'Ambulance', 'Vehicle Resource And Category Type' is empty, 'Vehicle Mutual Aid Response Type' is 'Local', 'At Agency Location' is 'Select Location...', 'Purchase Date' is 'mm/dd/yyyy', 'Initial Cost' is '\$', 'Make' is 'FORD', 'Model' is empty, 'Year' is '2016', 'VIN' is '4444444444444444', 'State of Registration' is 'Michigan', 'Primary Role of This Unit' is empty, and 'Level of Care of This Unit' is empty. The 'Mileage' section at the bottom shows 'No Results Found'.

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.

The screenshot shows the 'Agency Information' form in the ELITE web application. The form is titled 'Agency Information' and has a 'Save' button in the top right corner. A note at the top states: 'Note: This Agency is linked with 'Michigan' licensure'. The form is divided into two main sections: 'Details' and 'Specialty Service Capabilities'. The 'Details' section contains fields for 'Unique State ID', 'Agency Number', 'Agency Name', 'State', 'FDID', 'State Reporting To', 'Billing Status', 'EMD Provided to Agency Service Area', 'Primary Type of Service', and 'Other Types of Service'. The 'Specialty Service Capabilities' section contains a list of checkboxes for various services: 'Air Rescue', 'CBRNE', 'Community Health Medicine/MIHC/CP', 'Disaster Medical Assistance Team (DMAT)', 'Disaster Mortuary (DMORT)', and 'Dive Rescue'. A red arrow points to the 'Details' tab, and another red arrow points to the 'Specialty Service Capabilities' section, which is highlighted with a red box.

- 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.

The screenshot displays the Elite Setup Guide interface. The top navigation bar includes the ELITE logo, a dropdown menu for '(DEMO) Michigan D...', and links for Incidents, Resources, Tools, and Community. The user's name 'Sabrina Slee' is visible in the top right corner.

The main content area is divided into two sections:

- Agency Information:** This section contains a 'Note: This Agency is linked with 'Michigan Licensure'.' and a 'Save' button. Below this, there are tabs for 'Details', 'Service Area', 'Statistical Year Info', and 'No Incidents to Report'. The 'Service Area' tab is selected, and a red arrow points to it. The form includes fields for 'Unique State ID', 'Agency Number', 'Agency Name' (set to '(DEMO) Michigan Demo Service'), 'State' (set to 'Michigan'), 'FDID', 'State Reporting To' (set to 'Michigan'), 'Billing Status' (set to 'Yes'), 'EMD Provided to Agency Service Area' (set to 'No'), 'Primary Type of Service' (set to 'Transport'), and 'Other Types of Service' (set to 'Emergency').
- Service Area Information:** This section is a modal window that allows users to define the service area. It includes a 'State' dropdown (set to 'Michigan') and a 'Save' button. The form is divided into three main sections:
 - Agency Service Area Counties:** A list of counties (Alcona, Alger, Allegan, Alpena, Antrim) is shown on the left, and a list of counties (Kalamazoo) is shown on the right.
 - Agency Census Tracts:** A list of census tracts (26005000000, 26005030100, 26005030201, 26005030202, 26005030300) is shown on the left, and a list of census tracts (26077002801, 26077002802) is shown on the right.
 - Agency Service Area Postal Codes:** A list of postal codes (45506, 46737, 48001, 48002, 48003) is shown on the left, and a list of postal codes (49004, 49009, 49080) is shown on the right.

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)

The screenshot displays the ELITE system interface. At the top, the navigation bar includes the ELITE logo, a dropdown menu for '(DEMO) Michigan D...', and links for Incidents, Resources, Tools, and Community. The user's name, Sabrina Slee, is in the top right corner.

The main content area is divided into two sections:

- Agency Information:** This section has a 'Save' button in the top right. It contains a note: 'Note: This Agency is linked with 'Michigan Licensure''. Below the note, there are tabs for 'Details', 'Service Area', 'Statistical Year Info', and 'No Incidents to Report'. The 'Details' tab is active. Fields include: Unique State ID (260026), Agency Number (260026), Agency Name ((DEMO) Michigan Demo Service), State (Michigan), FDID, State Reporting To, Billing Status, EMD Provided to Agency Service Area, Primary Type of Service, and Other Types of Service. A red arrow points to the Agency Name field.
- Statistical Year Information:** This section has 'Back' and 'Save' buttons. It contains fields for: Year (2017), Total Primary Service Area Size (37), Total Service Area Population (10111), 911 Call Center Volume Per Year, Average Community Paramedic Visit Cost, Dispatch Volume Per Year (340), Patient Transport Volume Per Year (0), Patient Contact Volume Per Year (345), Billable Calls Per Year (0), and Average Community Paramedic Visit Billed.

- 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.

The image shows two screenshots of the Elite Setup application. The top screenshot is the 'Agency Information' form for '(DEMO) Michigan Demo Service'. The 'No Incidents to Report' tab is selected, and a red arrow points to it with the letter 'd.'. The form includes fields for Unique State ID (260026), Agency Number (260026), Agency Name ((DEMO) Michigan Demo Service), State (Michigan), FDID, State Reporting To (Michigan), Billing Status (Yes/No), EMD Vendors, Dispatch Center Names or IDs, Organization Status (Non-Volunteer), Organizational Type (Governmental, Non-Fire), Organizational Tax Status (Other (e.g., Government)), and Agency Time Zone (UTC-05:00 Eastern Time (US & Canada)).

The bottom screenshot shows the 'No EMS Incidents' report for August 2018. The report includes a table with columns for Year, Month, User Updated, and Date Updated. The data row shows Year: 2018, Month: August, User Updated: Kevin Putman (DHE), and Date Updated: 9/26/2018. There are also buttons for 'New', 'Delete', 'Ok', and 'Cancel'.

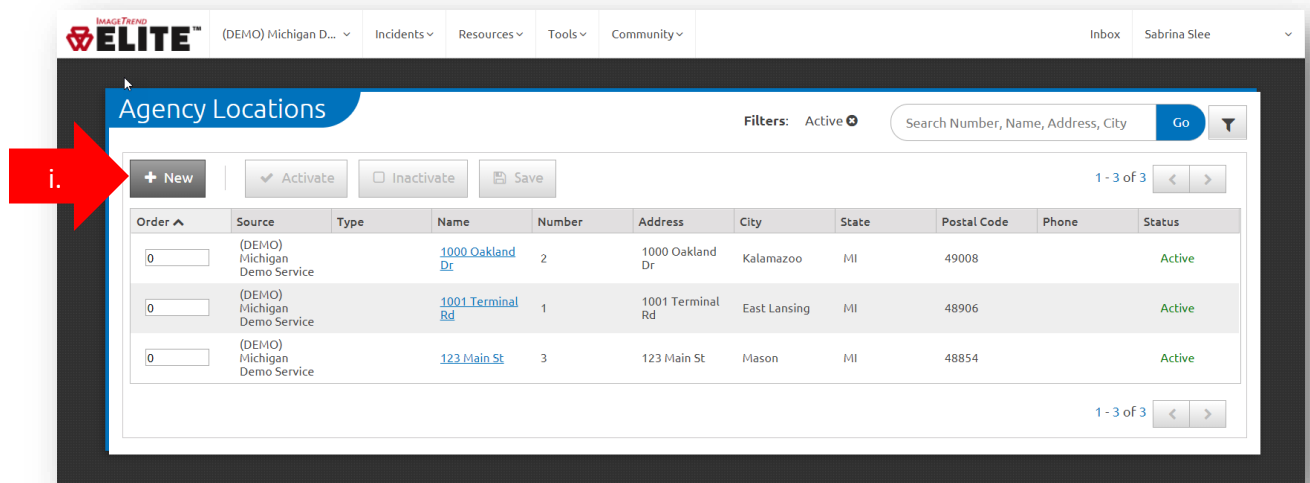
Optional Set-Up under the Resources Menu

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.

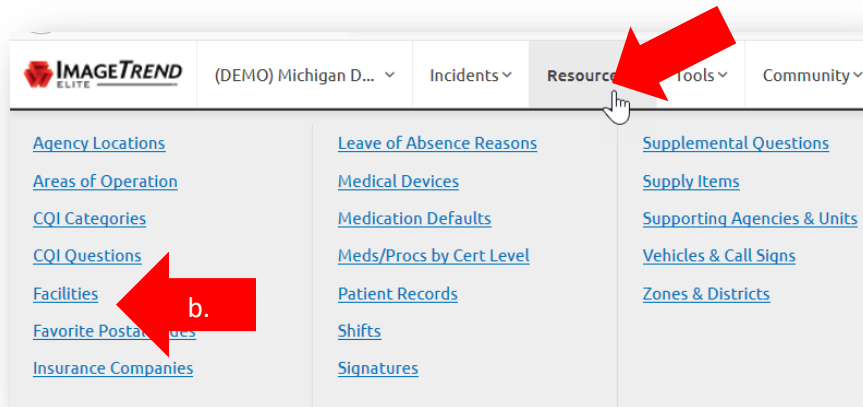
- a. Agency Locations: This is where an administrator would enter vehicle staging locations, bases, or stations. Vehicle location information has already been populated from agency licensure information. Names of these locations may be updated to something that is more descriptive and unique. Additional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



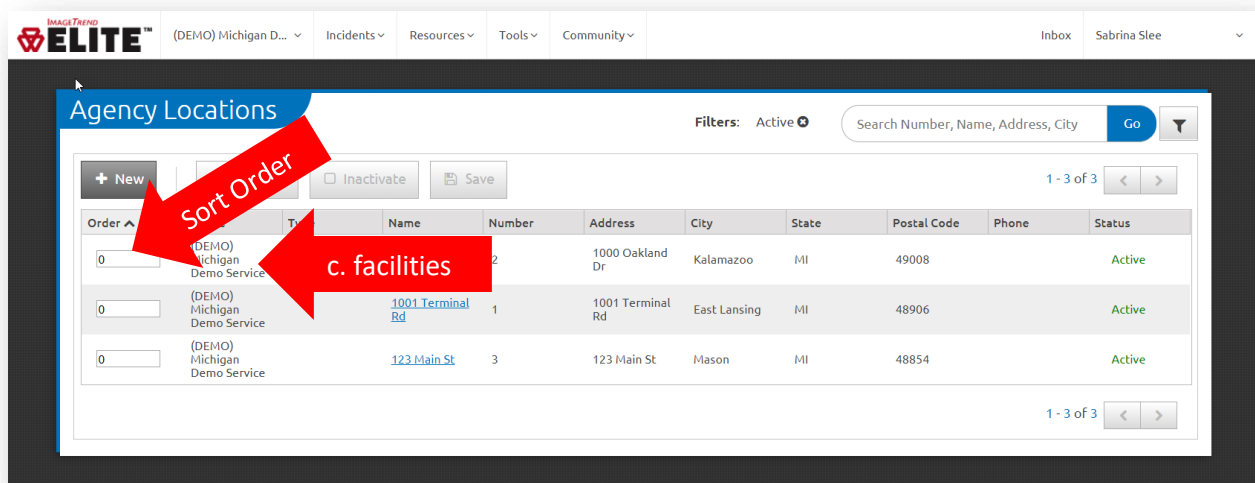
- i. To add locations, Click on the +New button



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

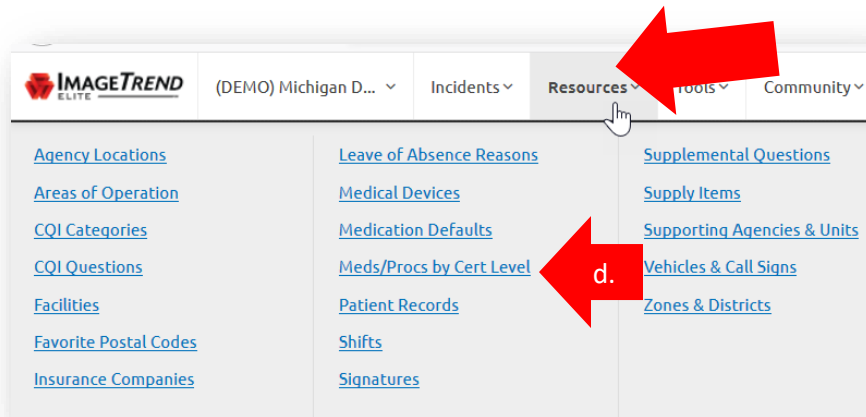


- c. Common facilities to which the agency transports can be moved to the top of the list by changing the sort order to Zero.

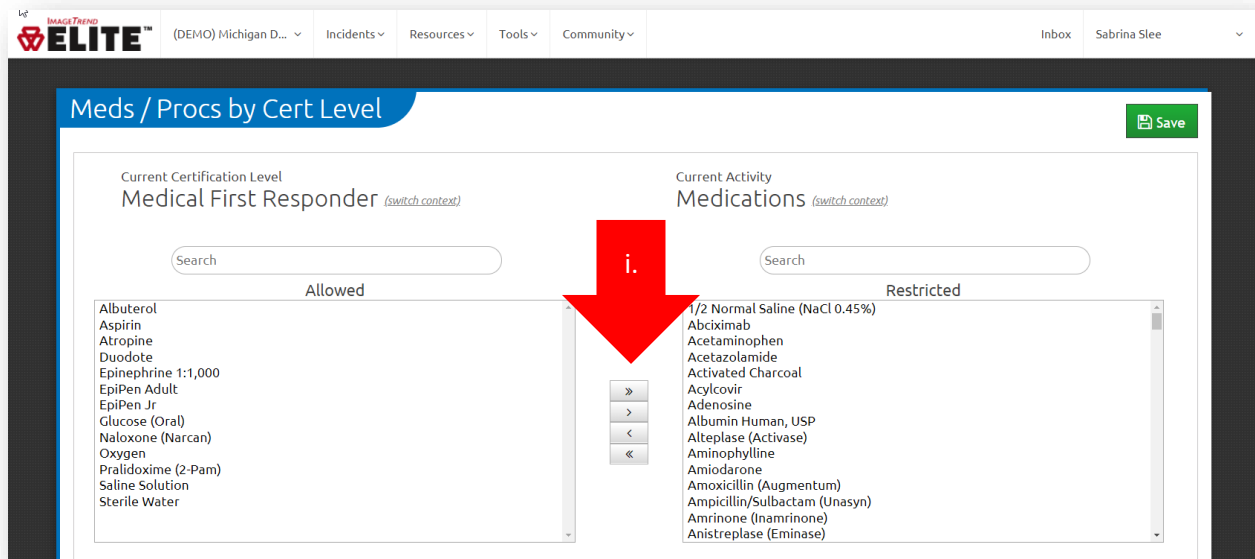


Important Note: Many locations have more than one entry in the system. For example, a hospital may have a long-term care unit, a drug treatment unit, and a psychiatric unit in addition to the main facility. This facility will be listed four times with the type of destination in parenthesis at the end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

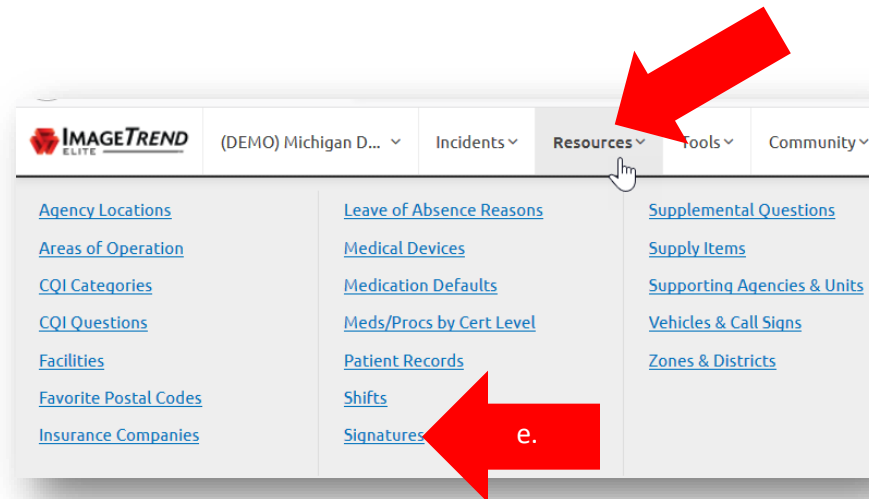
- d. Medications/Procedure by Certification Level: This will allow administrators to add or remove medication or procedures by certification level. This has already been defaulted to the State list based on state protocol. However, if the agency has a protocol exception or is part of a special study,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



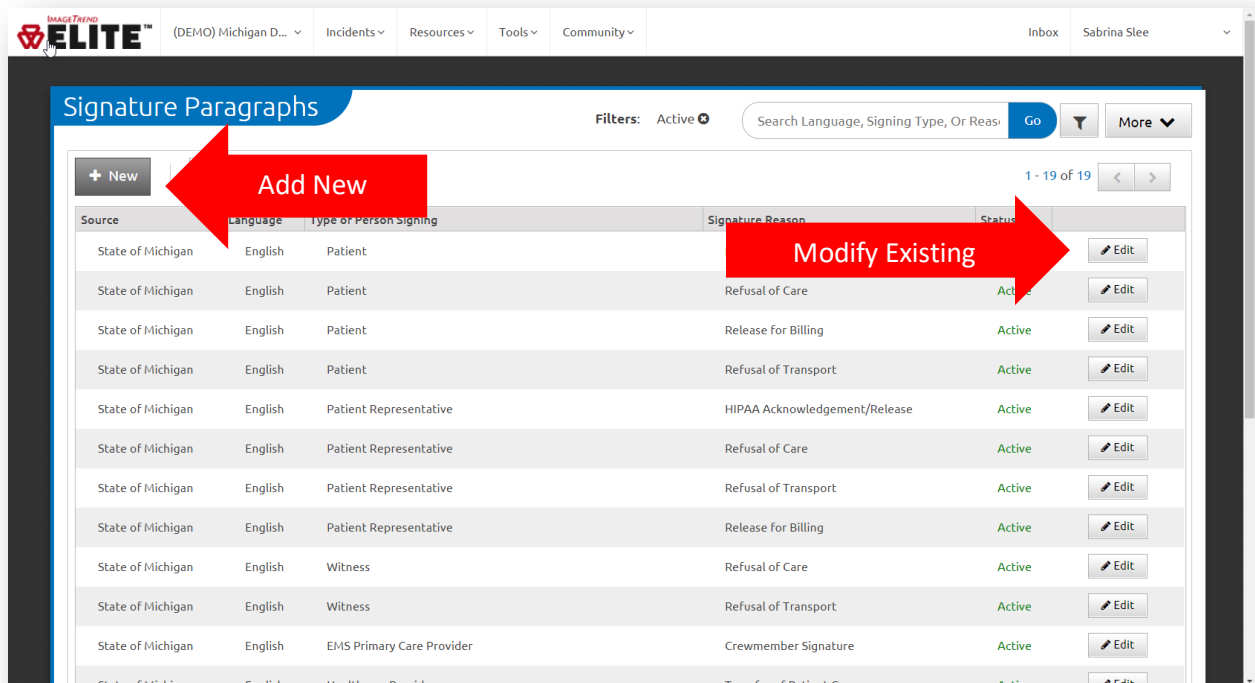
- i. Select a medication by clicking on it, and use the toggle buttons in the middle to place the medication in the correct category of Allowed or Restricted.



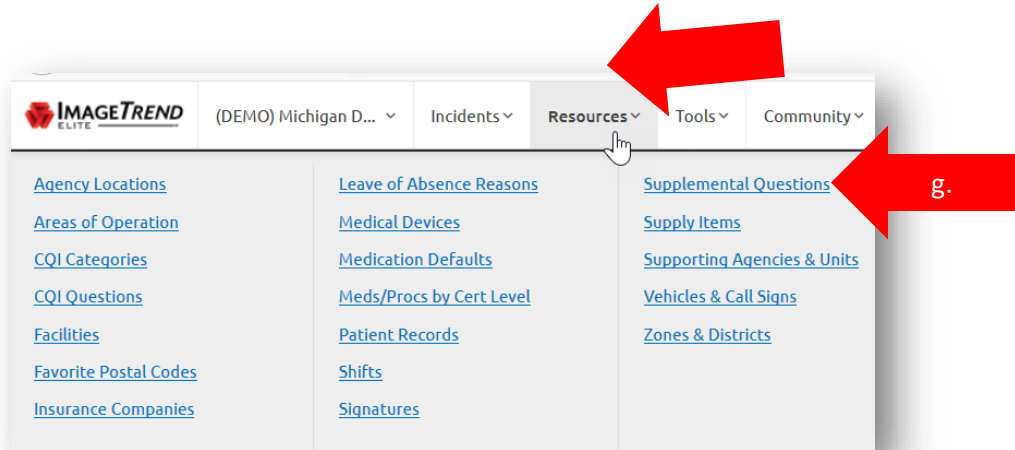
- e. Signatures: This is where the text for signatures appears by type of person signing and reason for signature. There are some generic signatures that were brought over from State Bridge. However, the list is not complete.



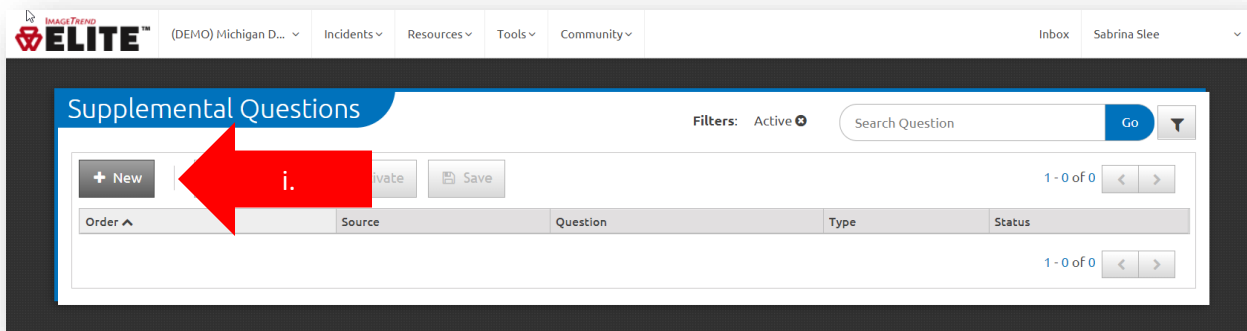
- f. In many cases an agency is using language that has been approved by its legal counsel. Administrators can update the signature text to suit the agency's needs by clicking on the appropriate spots as indicated below.



- 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.



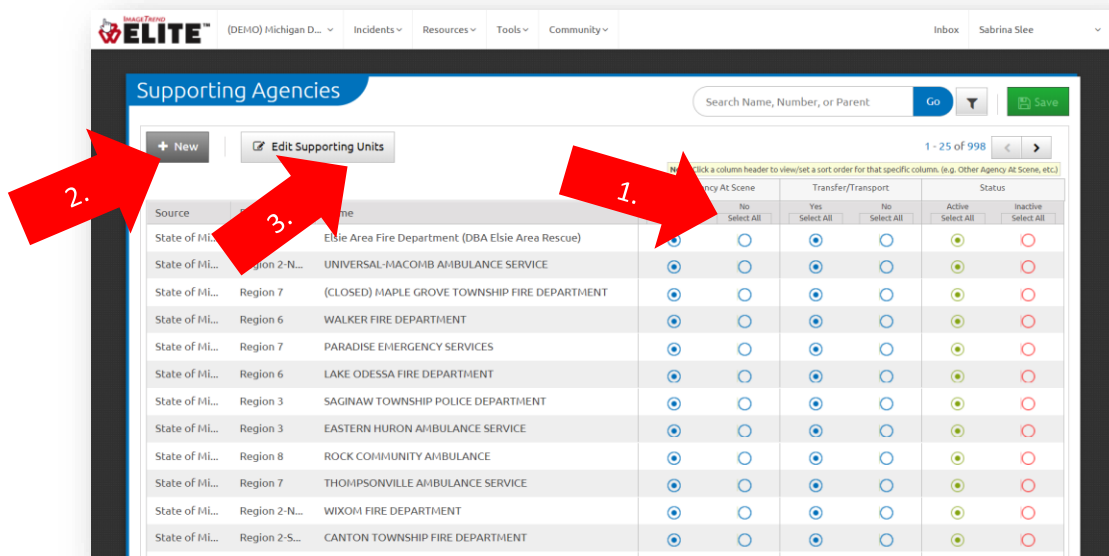
- i. Click the +New button to add new questions.



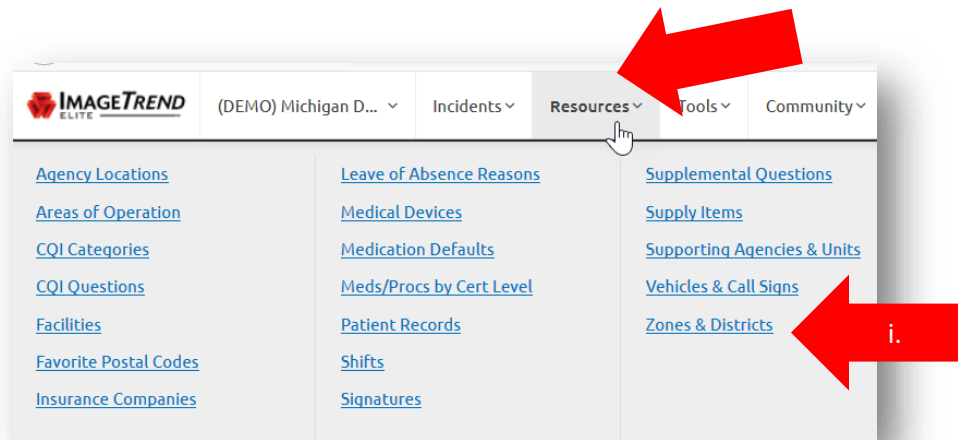
- h. Supporting Agencies & Units: This is the list of other agencies that could either be on scene or provide patient transport



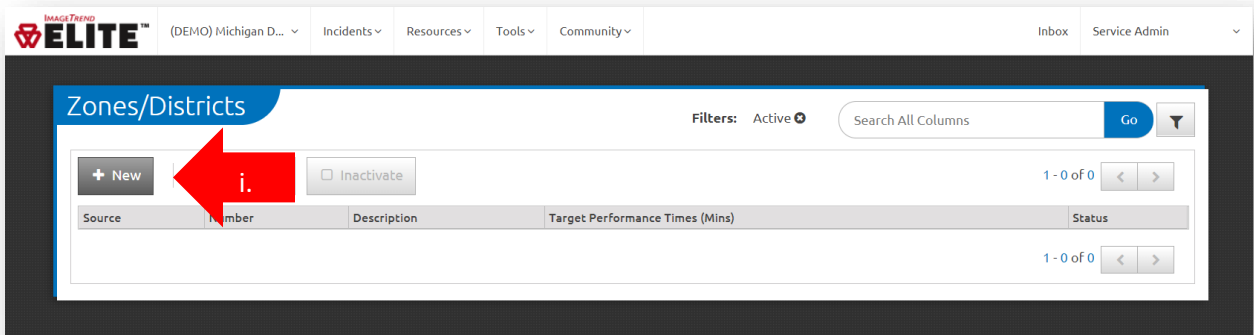
- i. By default, every EMS Agency in License Management is set to “Yes” for Other Agency at Scene, “Yes” for Transfer/Transport, and Active for Status.
1. Administrators can select the agencies in their area that they interact with on a regular basis. The quickest method to accomplish this is to inactivate 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.



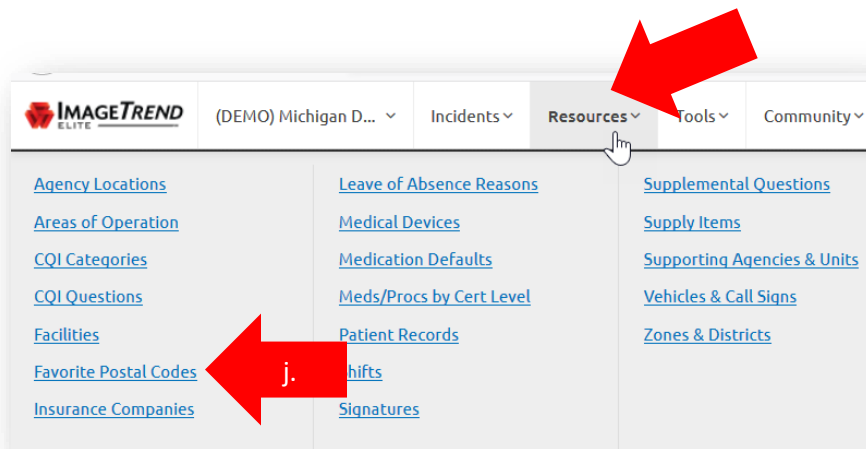
- i. Zones & Districts: This area is agency specific and has no values populated from the state.



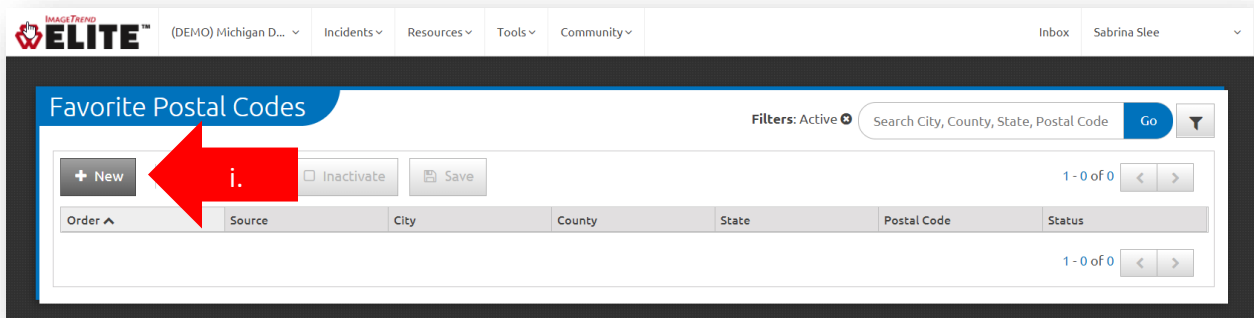
- i. If you have a need to further classify the location of the incident, this is where you would setup those zones by clicking the +New button.



- 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

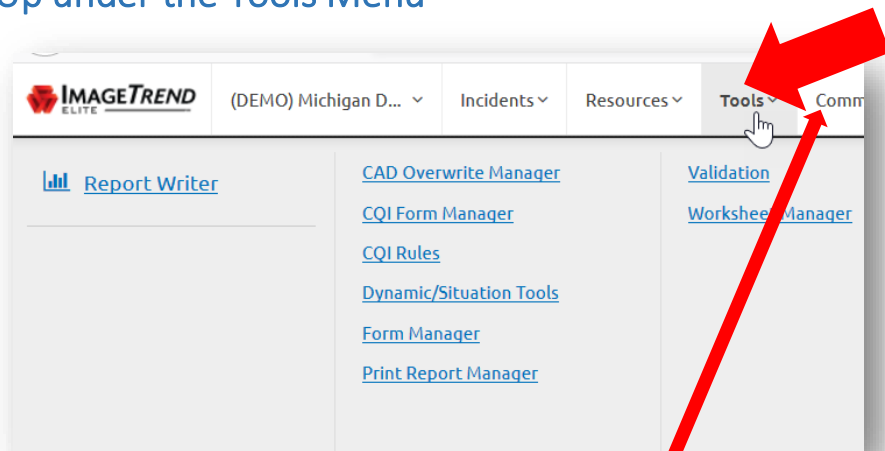


There are other settings under the Resources tab that agencies may also find useful. They can also be modified, such as Medical Devices and Shifts. These additional settings are also optional. More information for all of the Resources settings can be found in Help/University



under

Optional Set-Up under the Tools Menu



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

 [Help/University](#)

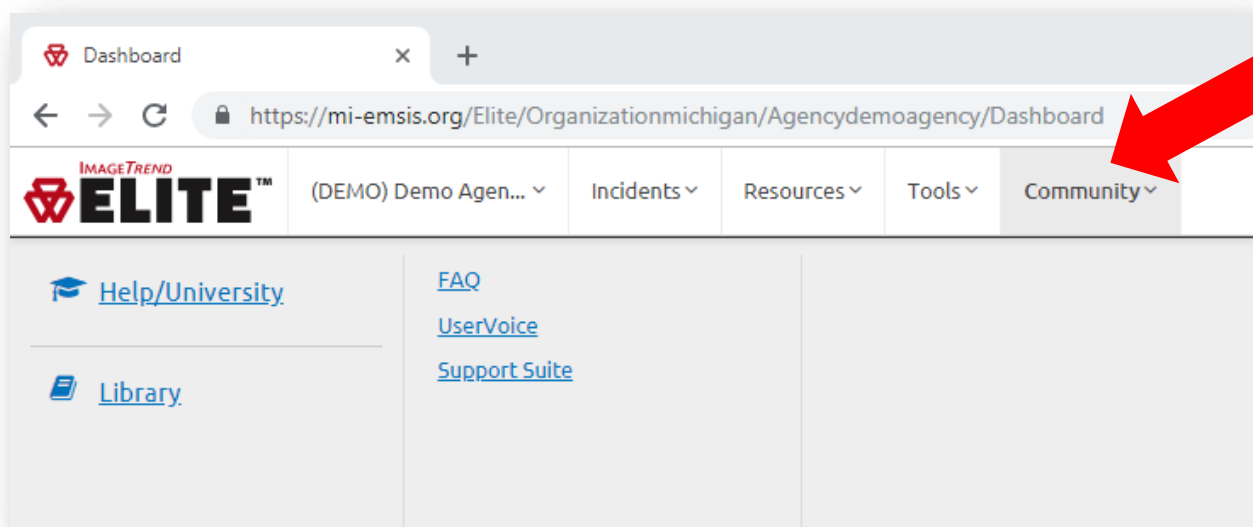
Located under the Community Tab

- a. CQI Form Manager and CQI Rules: 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. Dynamic/Situation Tools: 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. Form Manager: 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.

Kevin Putman, EMS Data Manager
PutmanK@michigan.gov
(269) 337-4291