EC3

Human Services Software

monaco & associates

2008
User Manual

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Overview of EC3

Purpose

EC3 is designed to help organize, manage, and coordinate all aspects of consumer services. The program is especially suited for the management of human services including services for persons who are mentally ill or mentally retarded and school-aged children receiving special education services.

- The program is of particular use in settings where long-range planning using goals and objectives is used.
- It is capable of handling all different traditional and graphic planning approaches.
- The software is especially valuable in improving the service planning process while reducing staff record keeping and record errors.

Consumer Information

Profile basic identifying, demographic, and diagnostic information, including photograph, organized by General, Personal, Disability, Emergency/Medical, and Other.

Daily Routines a schedule of times and activities that describes a consumer's day by each day of the week. May be launched from a set of default values or may be created each day from scratch. Once a plan has been initiated, the targets may be integrated into this schedule.

Education basic information about the consumer's current education and educational history including schools attended, contact information and notes.

Employment basic information about the consumer's current employment and employment history including places worked, contact information and notes.

Medications basic information listing each consumer's current and past medications and associated information.

Relationships for each consumer, a list of peoples' names, addresses, phone numbers and notes. A personal address book of people from outside the agency who have a personal or business relationship with the consumer.

Notes a collection of ongoing case notes organized by consumer. Used for recording ongoing information such as phone calls, remarkable events, and billable service coordination activities.

Budgeting information about the consumer's income and expenses. Entries can be added and edited and the balance can be calculated.

Incidents allows you to enter and view information about incidents and to write follow-up reports.

Service Participation identifies the services in which an individual has and is participating.

Consumer Forms consumer information in a document based on user-created templates in Agency Forms.

In addition to Consumer Information, each consumer may also have one or more plans with associated parts and follow-through information..

Developing a Consumer's Plan

You may use EC3 to develop a plan for any consumer entered into EC3 via the File | New Consumer command from the Main Menu.

Step 1: Schedule the plan from the Planning Schedule window.
Step 2: Create the Cover Page and Plan Text.
Step 3: Add Target Skills and Services.

After the plan is developed:

Step 4: Data for Target Skills and Services is entered via Data Entry.
Step 5: Progress toward each individual Target Skill and Service is reviewed periodically. If necessary, adjustments are made.
Step 6: The whole plan may be reviewed via Quarterly Reviews.

Administration

From the Tools | Administrative command on the Main Menu you may
- monitor system use and sign users off of the system (System Use)
- control each user's level of access to parts of EC3 (User Profile)

- set global preferences for EC3 features (Preferences)
- customize daily routines, levels of assistance, strategy instructions, consumer profiles, users and report labels.(Customize)
- use functions (archive, delete, restore, hide or show consumer information, consumer plans, and staff information) for Record Management
- modify your list of available Medicare/Medicaid Place of Service codes (Place of Service Codes)
- add new incident types based on your need. (Custom Incident Type)

Maintaining Confidentiality of Information

Confidentiality of records can be maintained by limiting the scope and content of consumer information to which a user has access.

Via Service Assignments, the user/staff member is assigned to a subset of consumers. Then via User Access, the user may be limited to view

1. consumer information for those consumers to whom s/he has been assigned;
2. certain portions of consumer information (e.g., Profile only);
3. within a portion of consumer information, the user may have read only access or read/write access.

Maintaining a Secure System

Maintaining a secure system means preventing non-users from accessing the system.

1. all users have to be entered into the ec3 database
2. all users must have a password
3. all users are only allowed to access that info they have been permitted in their user profile.

Convention Used in This Manual

Following standard practice, this manual refers to menu items on the EC3 Main Menu by separating menu items with the “|” sign. Thus, an instruction in the manual to “use the File | New Consumer command“ refers to, first, selecting the “File” menu option on the EC3 Main Menu and then, from the submenu that appears, the “New Consumer” option.

Starting Out

Setup

There are several scenarios for setting up EC3:

Single-User Setup	A complete installation of EC3, including all executable files and the EC3 database.
Multi-User Setup	A complete installation on the server (followed by workstation setups on client machines).
Work Station Setup	Workstation files installed on client machines and the EC3.ini directed to start the EC3 program from the server.

Setup Checklist

- **Set agency preferences** (Tools | Administrative | Preferences)
  Set up global system preferences for EC3 features via Preferences to control how EC3 is accessed by all users.
- **Enter people** (File | New Consumer; File | New User/Staff)
  Enter all consumers via the New Consumer command. Enter all staff who are involved with services to consumers via the New User/Staff command.
- **Set system access for Users** (Tools | Administrative | User Profile)
  Begin setting up system security via the Security section of User Profile. You may limit access to functional areas of EC3 and specify whether access is "read/write" or "read only" according to the kinds of work staff do
- **Make service assignments** (Tools | Service Assignments)
  Assign specific staff members to specific consumers. Make service assignments by consumer or by staff member using the Service Assignments command.
- **Enter planning data for Consumers who have plans in progress** (Tools | Planning Schedule; Planning | Cover Pages, Plan Text, Target Skills & Services)
  To begin using the EC3 data entry, data summary, and review features for each consumer who is not yet at the beginning of the planning cycle, follow the steps outlined in How to Use EC3 for Consumers with Plans in Progress.

Once you begin to use EC3, you may find that you would like to

- **Add to the Skills & Services Library** (Tools | Design | Skills & Services Library)
  Add to the library of skills using the Skill & Services Library command.
- **Enter agency forms** (Tools | Design | Agency Forms)
  Import any commonly-used forms using the Design Agency Forms command.
- **Enter and/or customize Plan Templates** (Tools | Design | Agency Forms)
  Verify that one of the forms in Form Designer with the designation Plan Template matches your preferred outline for consumer plans or enter your preferred outline(s) using the Design Agency Forms command. Be sure to check the Plan Template box when creating a new plan template.
- **Customize settings** (Tools | Administrative | Customize)
  From Tools | Administrative | Customize you may change default settings for consumer daily routines (Daily Routines command), default levels of assistance (Levels of Assistance command), and default teaching teaching instructions used by the Skill/Service Wizard (Strategy Instructions command).

Workstation Setup

After running Multi-User Setup set up individual work stations by running the EC3 Setup program from each work station.

To set up an additional work station

1. Insert the EC3 compact disk into a cd-rom drive.
2. Close any open applications.
3. Select File | Run from the menu in the *Windows* Program Manager.
4. Type in <drive>:setup\ec3setup\setup\setup.exe and then the OK button. The Setup program will start.

Running the Setup Program

5. Setup will prompt you for the drive that contains the files to be set up (a: or b:).
6. Select the Work Station setup option when prompted.
7. When prompted, enter the drive letter and the name of the subdirectory where the EC3 database was installed (e.g., f:\EC).
8. When prompted, enter the drive letter and the name of the subdirectory where the EC3 program files are to be

installed on the workstation (e.g., c:\EC).
9. Setup will prompt you to enter registration information (your name, agency name, registration number).
10. It will take about five minutes for all files to be installed. Setup will prompt you to change diskettes, as needed. When completed Setup adds a new Program Group to the Program Manager from which you may run EC3 or EC3 Help.
11. To run EC3, double-click the icon from the new Monaco & Associates EC3 group.

EC3 is sent to you containing the information for the maximum number of concurrent users (according to your license) and allows only that number of users to be signed on at a time.

Customizing the EC3 Workplace

EC3 lets you customize clinical and administrative areas of the software for maximum flexibility and usefulness. Customization allows you to adapt EC3 to your current practices, as much as possible, so transition is easy and work is less disrupted. **Customize any of the following areas to modify the 'default' settings that EC3 uses**.

to create plans
   Cover Page(s)
   Forms & Plan Templates

to create teaching strategies
   The Skill & Services Library
   Master Teaching Instructions
   Master Levels of Assistance

to create consumer schedules
   Master Daily Routines

to control how EC3 is accessed by all users
   Preferences

Signing On

EC3 is a password-protected application. Therefore, to use EC3, you must type in your last name and password, to receive access. Name and password may be typed in any combination of upper and lower case. Typical sign-on is *not* case-sensitive.
As you type in your password, it will appear as a series of asterisks.
While signing on to the system you may encounter one of these two messages:

Invalid Name/Password Combination. You have made an error in typing in your last name or your password. Or you may have changed your password and forgotten. Try again or contact the system administrator for assistance.

Already Signed On. Someone else may have signed on to EC3 using your name and password--don't let others know your password--or you may have encountered an abnormal exit (e.g., a system crash) the last time you used EC3. You need to be signed off via Current Users by someone else who has access to the Administration window. Or use the F5 option.

Overview of the Planning Process

It is essential to understand how the planning process is conceptualized in EC3. ***All planning starts with* scheduling a plan *for the individual***. **All planning documents are accessed via the consumer's name and the plan date.**

1. Consumer information is entered (File | New Consumer)
2. A plan is scheduled for the consumer (Tools | Planning Schedule) – you will have the option here of importing an existing document into the new plan
3. A cover page may be created (Planning | Cover Page)
4. The Plan Text can be edited (Planning | Plan Text)
5. Target Skills and Services may be added
6. Quarterly reviews may entered

How to Use EC3 for Consumers with Plans in Progress

1. Enter Consumer Name and ID (social security number)
   Select File | New Consumer from the main menu to enter the person. Entering information into the consumer

Profile, Relationships, Education, Employment, Medications, Notes, and so forth, may be done later.

2. Assign Staff to the Consumer (optional)
Select Tools | Administrative | Service Assignments from the main menu to assign staff to consumers. Select the consumer's name from the box and, then, select those staff who will be involved in monitoring or carrying out the plan's Target Skills/Services.

3. Enter Daily Routines (optional)
If you plan to schedule Target Skills/Services into the consumer's Daily Routines, the routines must be created. Select the Consumers | Daily Routines command from the main menu.

4. Enter Initial Planning Information
To initiate the plan in EC3, select Tools | Planning Schedule from the main menu. From the Planning Schedule window select New to enter the essential information about the plan that is currently in effect.

5. Create a Cover Page for the Plan (optional)
Select Consumers | Planning | Cover Page and then select the person's name to have EC3 automatically create a document (Cover Page) containing factual information based on the consumer's Profile and other completed areas of consumer information.

6. Enter Plan Text (optional)
Select Consumers | Planning | Plan Text and then select the person's name to open the consumer's Plan Text.

7. Enter Ongoing Target Skills and Target Services
Select Consumers | Planning | Target Skills & Services to enter the consumer's current teaching and service objectives (Target Skills & Services).

The EC3 Main Menu

Purpose
From the Main Menu you may navigate to all the functional areas of EC3.

Getting There
The Main Menu is the large window which opens after you have successfully signed on to EC3.

Window Appearance
At the top of the window is a title bar with the name EC3 and a notification if you have unread messages sent to you via the EC3 messaging system.

Immediately below the title bar are the main menu options: **File**, **Consumers**, **Planning**, **Tools**, and so forth. Selecting one of these options provides more options and these are described in detail below.

At the bottom of the main menu window is a short-cut button bar and a status bar.

The EC3 Toolbar

The EC3 Toolbar contains buttons that allow you to performs various actions including, from the left, cut, copy and paste, spellcheck, create a new record, edit, save or delete a record, print a report, close the form, or search for specific records. By resting your cursor over a toolbar button, you will evoke a yellow "tooltip" message which will tell you which funtion the button performs.

On some forms, the toolbar appears horizontally (as above) at the top of the EC3 window, just above the form window. On other forms, the toolbar is vertical and is placed on the form window towards the right side. Not all forms use all buttons. The buttons may not all be present on the form, or they may be in a different order than they appear in this picture. Certain buttons will not be "active" at all times, depending on the functions that the form uses, and depending on the state the form is in. When buttons are inactive, they will be "greyed out" in appearance and will not respond when clicked. The use of these buttons is discussed in the instructions for using the various forms.

Cut (Toolbar)

Removes a selection and places it onto the clipboard (erasing the previous contents) so you can then move it (via the Paste command) to a new location.

To cut

Highlight the information you want to remove, and then select Cut from the Toolbar.

Copy (Toolbar)

Copies a selection to the clipboard, leaving the original intact and erasing the previous contents of the clipboard. Copy is always used in conjunction with Paste.

To copy

Highlight the information you want to copy, and then select Copy from the Toolbar.

Paste (Toolbar)

Inserts the contents of the clipboard into your window at the point where the cursor is resting. You may paste repeatedly without affecting the clipboard's contents. Used in conjunction with Cut and Copy.

To paste

Place the cursor at the insertion point and select Paste from the Toolbar or CTRL + V.

Spelling Check

Spell checking is available in Plan Text, Cover Page, Form Designer, and any EC3 window where the Check Spelling tool is activated. EC3 starts the Spell Check when you select the Edit button, place the cursor in the text area, and click the Check Spelling button in the toolbar.
The Check Spelling dialog box appears if EC3 finds a spelling error or a word it does not recognize in the built-in customizable dictionary. EC3 highlights the unrecognized word.

Word Not Found In Dictionary Dialog Box

In the Check Spelling dialog box, the word appears in the Not Found field and suggested alternative spellings appear in a list box. EC3 places its best guess for an alternative spelling in the Replace With field.

To Replace a Misspelled Word with the Correct Spelling

If the word in the text box is the correct alternative, choose the Replace button. Replaces the current occurrence of the highlighted text with the text in the Replace With field.

or

If the word in the text box is incorrect and the correct alternative is in the list box, either double-click the correct word, or select it and choose the Replace button.

or

If EC3 did not find a correct alternative, enter the correct spelling in the text box and choose the Replace button.
With Replace All Spell Check replaces all occurrences of the word for the remainder of this spell-checking session.

To Accept an Unrecognized Word as Correct

You can instruct Spell Check to bypass a word that it does not recognize.

1. When the unrecognized, but correctly spelled, word appears in the Found field, choose the Ignore button.
2. With Ignore All Spell Check bypasses all occurrences of the word for the remainder of this spell-checking session.

To Add an Unrecognized Word to the User Dictionary

When the unrecognized, but correctly spelled, word appears in the Found field, choose the Add to Custom button to add the word to the custom.vtc dictionary. When you add an unrecognized word to the user dictionary, the Spell Check feature recognizes this word as correctly spelled whenever you use this user dictionary.

To Look Up Alternative Spellings of a Word

1. Type the word in the Replace With text box of the Check Spelling dialog box.
2. Choose the Suggestions button.

Suggested spellings display in the list box.

To Customize Spelling Options or Select Spelling Dictionaries

Select the Options... button. The Spell Options dialog box appears. From the list of options, check the criteria you wish to be applied during the spell check.

Select Open Custom to switch to another Custom dictionary.
Select Open Standard to switch to another Standard dictionary.

Open Custom Dictionary. The main custom dictionary in use is displayed below the Open Custom button. Choose the Open Custom button to access the Open Custom Dictionary dialog box in which you may select a different custom dictionary.

Open Standard Dictionary. The main dictionary in use is displayed below the Open Standard button. Choose the Open Standard button to access the Open Standard Dictionary dialog box in which you may select a different standard dictionary. By default, EC3 uses american.vid--a compressed US English dictionary, which you can not modify.

Delete (Toolbar)

Deletes a selection of text without saving it to the clipboard.

To delete

Highlight the information you want to delete, and then select Delete from the Toolbar.

Tips and Tricks

Printing Reports, Worksheets, Strategies and Data Sheets

All reports, worksheets, mailing labels, strategies and data sheets are available for printing from File | Print it. The Print button appearing on most windows allows you to print select reports that are relevant to the specific window. Reports are organized according to the following report groups:

- Administration
- Agency Forms
- Billing
- Consumer Forms
- Consumer Information
- Incidents
- Planning
- Plan Implementation & Review
- Quarterly Review of the Plan
- Resource Directory
- Inservices
- Libraries
- Personal

Personal Information Management

EC3 is a password-protected program that requires information used to identify each user (last name and password). This required information is entered on the sign-on screen of the program. Once signed on to the program, EC3 is able to take advantage of "knowing" who the user is. For this reason, it is important to sign on only as yourself and to keep your password to yourself. The only other person who should know your password is the system administrator.

Whenever you sign on to EC3, your name is used as the author for consumer Notes and Review Notes. Your name appears as the sender on messages sent by you The system knows your access level and lets you into only those areas of EC3 for which you have clearance and may restrict your access to *read only* for some areas you can access. You are the only user who is able to see your personal Messages and Reminders. You are able to change your password if you wish.

Shortcut Bar

The Shortcut Bar contains buttons that provide shortcut access to the most commonly-used commands on the EC3 menus. The tool bar appears at the bottom of the EC3 window. By resting your cursor on a button, you will see a yellow "tooltip" that tells you what the button controls. For instance, if you count from the left, the buttons in the third through the twelfth position control the windows on the Consumer menu.

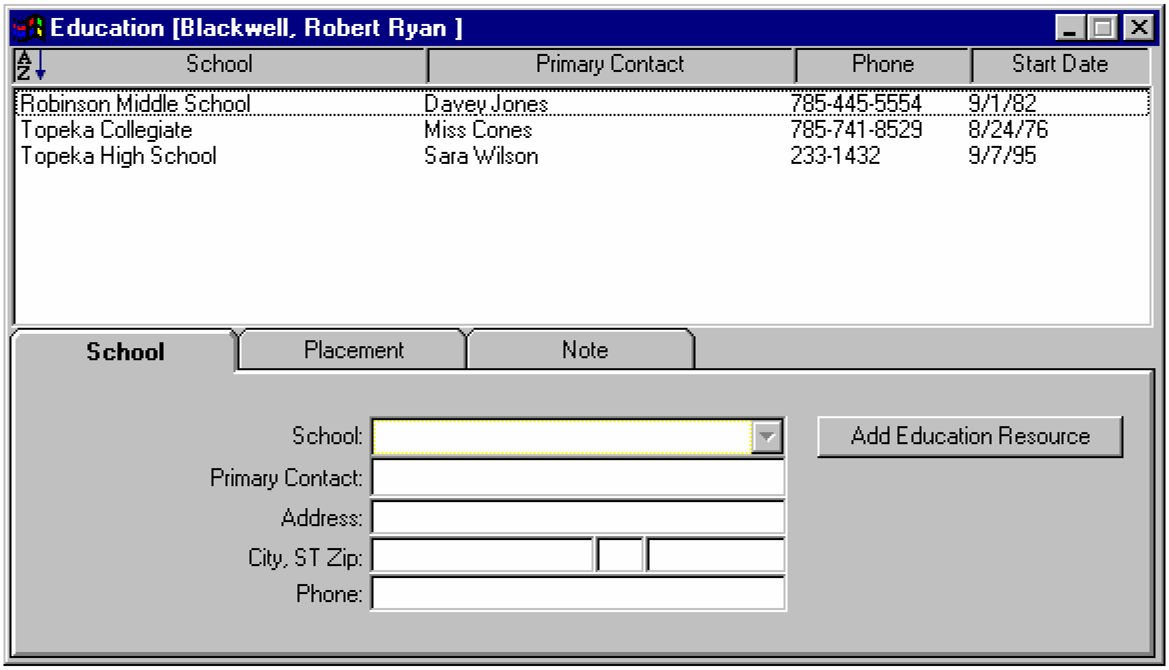
Once a Consumer window is open for a specific consumer, use of the bar to open subsequent Consumer windows will open the windows with that consumer pre-selected in the Name dropdown box.

Sorting

Information in list boxes can be reordered by any of the categories of the list box (e.g., name, date or time), in ascending or descending order.

To Sort data in a list box:

- Click on the category title of the field to be sorted.
- Clicking a second time (or double-clicking) sorts the information in descending order.
- Clicking on another category title sorts the data by that category



Notify (Planning Schedule, Incidents, Notes Windows)

Use the Notify button from Planning Schedule, Incidents, or Notes to send to selected EC3 users information about a new or modified plan, incident, or note (respectively) for a consumer. The information about the new item appears in the recipients' EC3 Messages (Received) or is sent via your e-mail client, depending on the option chosen in Preferences.

To Notify

1. Select the Notify button.
2. From the Distribution List box, indicate users to notify by selecting their names. More than one name may be selected at a time by holding down the CTRL key while selections are made by selecting them with the mouse pointer.
3. Select the OK button to send the message to the selected individuals.

Distribution List (Notify)

A Distribution List may be used when you decide to notify individuals of an upcoming planning meeting for a consumer, Notes written or Incidents recorded. Once the information is completed for a new or modified entry, notification may be sent to all EC3 users selected from the Distribution List dialog box. Depending on selections made in Preferences, the notification may be sent via your resident e-mail client to EC3 users and non-users alike.

To Use the Distribution List

1. From the Planning Schedule, Notes, or Incidents window, select the Notify button. The Distribution List dialog box will appear with all available EC3 users in the list.
2. While pressing down the CTRL key, use the mouse pointer to select the names of each person to receive the notice.
3. Select the OK button to send the notice. Notices sent are retrievable via Tools | Messages (Receive) the next time the recipient signs on to EC3.

Distribution List (Send Messages)

A Distribution List is created when you decide to send a message or notify individuals of an upcoming planning meeting, consumer note, or incident for a consumer. The message or notification is sent to all EC3 users selected from the Distribution List dialog box. Messages sent via EC3 are retrievable the next time the recipient logs on to EC3.

To Use the Distribution List

1. From the Send Messages window, select the Send Message button. The Distribution List dialog box will appear with all available EC3 users in the list.
2. While pressing down the CTRL key, use the mouse pointer to select the names of each person to receive the message.
3. Select the OK button to both save and send the message, returning you to the Send Messages window. The recipients of the sent message now appear in the sender's Send log.

The Skill & Services Library

The Skill & Services Library is designed to contains a collection of skills and services that may be selected for use when creating a consumer's Target Skills and Target Services. For a skill or service to be available for use with the Skill/Service Wizard, it must first be entered via Tools | Design | Skills & Services Library from the main menu.

When EC3 is initially installed, the Skill & Services Library contains over 200 functional skills to be taught using teaching methods based on the principles of behavior modification. You may add as many skills and services to the library as you wish.

Each skill to be added to the Skill & Services Library must be linked to one of five skill types:

Steps of a Task Analysis
The components of the skill consist of steps of a task to be performed by the learner in the order listed. The method for teaching the individual steps of a task analysis may be one of three variations: forward chaining, backward chaining and total task.

Successive Approximations (Shaping)
The components are a series of progressively more difficult approximations to the skill to be mastered, one at a time, by the learner. Teaching begins with the easiest (lowest-numbered) step. Once a teaching step is mastered, for the next trial, the next (untrained) step in the sequence becomes the targeted teaching step. Teaching proceeds with each step until the last (most difficult) step is mastered.

Questions and Answers
The components are questions to be asked of the learner and corresponding correct answers. The teaching method used by EC3 for teaching answers to questions is the total task variation where the answers to all questions are taught on each trial.

Stimulus/Response Pairs
The components are stimulus items to be presented to the learner and corresponding correct responses. The teaching method used by EC3 for teaching responses is the total task variation where the responses to all corresponding stimulus items are taught on each trial.

Single Target Behavior
The target behavior is simple and specifically defined. The desired direction may be to *increase* the target behavior or to *decrease* the target behavior.

Components (Target Services). Components are the elements of a complex service that are to be delivered or monitored either sequentially or simultaneously. Components originate from the Skills & Services Library. Components originating from the Library may be edited, including changes in component wording and changes in the number of components (e.g., adding more components or deleting some components) without affecting the Library. Edits must be done before data is collected and entered in the Data Entry window for the Target Service.

Components (Target Skills). Components are elements of a complex task that are to be presented to the learner either sequentially (chaining/shaping) or simultaneously (total task). They may be steps of a task analysis, successive approximations to a terminal behavior, questions and answers, or stimulus/response pairs. Components originate from the Skills & Services Library.

Components may be edited, including changes in component wording and changes in the number of components (e.g., adding more components or deleting some components) without affecting the Library. Some Question & Answer components originating from the Skill & Services Library ***require*** editing when the phrase "Insert correct answer here" appears in brackets. Edits must be done before data is collected and entered in the Data Entry window for the Target Skill.

Note
If the skill is a single target behavior, it has no components.

Additional Tips

1. The social security number (ssn) is used as the key for all consumers and all users/staff.
2. You can log on to an alternate database from the Sign-on screen using CTRL + ALT + F5.
3. If you get locked out of the database, use F5 from the Sign-on screen to get to Current Users to sign yourself off.

File Menu Commands

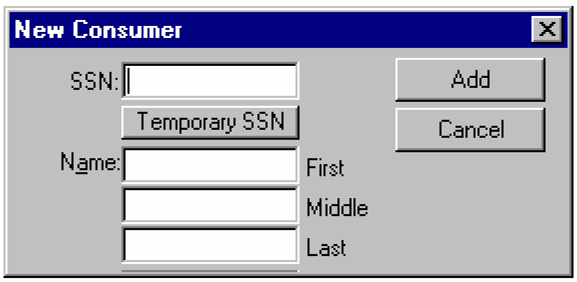
New Consumer

Purpose
The New Consumer window allows you to add a new consumer to the database.

Getting There

Select File | New Consumer from the main menu; or you may click  on the tool bar at the bottom of the EC3 window.

Window Appearance



Adding a new consumer
- Enter the individual's 9-digit social security number or other unique identifying number.
- Enter the consumer's first name, middle name or initial (optional), and last name.
- Select the Add button.

Once entered into the system, consumer information and plans may be added.

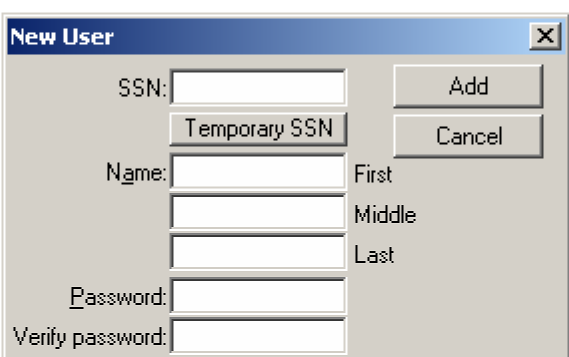
Note
If the SSN is not available, you may generate a temporary SSN using the corresponding button.
SSNs for consumers may be edited via the Change Consumer SSN function in Tools | Administrative | Record Management.

New User/Staff

Purpose
The New User/Staff window allows you to add a new User/Staff to the database.

Getting There
Select File | New User/Staff from the main menu.

Window Appearance



Adding a new user/staff member

- Enter the individual's 9-digit social security number or other unique identifying number.
- Enter the staff member's first name, middle name or initial (optional), and last name.
- Enter the staff member's password to use EC3.
- Verify the password.
- Select the Add button.

Note

- You may generate a temporary SSN using the corresponding button.
- SSNs for staff may be edited via the Change User SSN function in Tools | Administrative | Record Management.
- Once added, you modify a user's level of access to EC3 from the User Access window. The new user may now sign on to EC3 using their Last Name and Password. People entered as users will also be able to send messages and will appear in distribution lists to receive messages. They will appear in name selection boxes for plan Reviewer and Facilitator, and may be selected as a Responsible Person for a Target Skill/Service.

Print It

Purpose

The Print It window allows you to preview and print EC3 reports, as well as user-designed forms, mailing labels, data sheets, and worksheets, to facilitate communication and transfer of information away from the computer.

Getting There

Select File | Print it! from the main menu.

Window Appearance

There are two tabs on the window to help select printing jobs.

Tabs and Buttons

Select Report [TAB]	select a particular report from a report group
Select Records [TAB]	select particular records (e.g., consumers) to print

To Print

1. On the Select Report tab, use the Report Group dropdown list to select the general type of report you wish to print.
2. In the Report Name box select the specific report you wish to print. Note that when you select a report name, a description of the selected report appears in red below.
3. If the Select Records tab is active (not greyed out), click on the Select Records tab and complete the required information, e.g. selecting names of individuals, dates to print (e.g., for Notes), and so forth.
4. Use the following buttons to complete the job:

Set up	to select the printer and page margin
Print	to view a document on the screen without printing it. Once the document is on the screen, you can: -print (controlling page range and number of copies), -export the document to storage media or to email, using other data formats if you wish, -refresh the data, -magnify/reduce the document, -page forward and backward through the document, or -search for certain words or text strings in the document.
Done	To exit the print window

Print Preview. Before printing, EC3 shows you a preview.

Print Setup. From File | Print it select the report or form you want. Print *Setup* can be used to select the printer options you want when printing reports. EC3 uses the *Windows* default printer. Only the fonts and printer options available with your printer will work with EC3.

Consumer Menu Commands

Consumer Profile

Purpose
Use Consumer Profile to display, add and change basic identifying, demographic, diagnostic and personal information about a consumer. Information from Profile selected in Cover Page Designer is used to create the Cover Page of the consumer's plan.

Getting There
Select Consumers | Profile from the main menu; or you may click in the toolbar at the bottom of the EC3 window. If you use the toolbar to open the form when you have another Consumer form open to a specific consumer's data, the Profile form will open with that consumer's data already selected..

Window Appearance
There are tabs on the Consumer Profile window to help organize the information. The toolbar just below the main menu contains the Select Consumer dropdown list of consumer names and toolbar buttons for editing.

Tabs and Buttons

General [TAB]	general information about this consumer.
email [BUTTON]	a quick link to generate email to the address listed.
Photo [BUTTON]	(looks like camera) opens a dialog box to find a photo in bmp or jpg format
Service Eligibility [BUTTON]	opens the "Service Eligibility for..." window
Personal [TAB]	birth, physical, social and guardianship information.
Disability [TAB]	primary and secondary disability, aids to maximum independence, level of functioning and diagnostic code seaching.
Emerg/Med. [TAB]	emergency contact, emergency information, allergies and medical history.
Emergency Contact [BUTTON]	Opens Emergency Contact Detail window with telephone numbers and contact information for the listed emergency contact person.
Other (text) [TAB]	information that is important to record about consumers. You may create a customized format for your agency using a uniform text outline to organize the information in the Customize window and then import it into this section.

Viewing and Editing
To view information, select a consumer name from the Select Consumer dropdown list on the main menu toolbar.

To edit information, first click the Edit button on the main menu toolbar, then type in information as you wish.

- Clicking the Edit button will make the photo button visible. To add the consumer's photo to the profile, first you must store the photo in a location you can navigate to. The photo must be in bitmap or jpeg format. Then in Consumer Profile, click Edit, then click the photo (camera) button and use the resulting dialog box to locate the photo you wish to insert.
- You will notice that the Guardian text box on the Personal tab and the Emergency Contact text box on the Emerg/Med tab are a different color. These two text boxes must be filled by selecting individuals from information that has previously been entered in the consumer's Relationships.
- The Age field on the Personal tab cannot be filled in directly. The age is calculated automatically from the birthdate.

Once the editing changes are complete, click the Save button.

Printing
Use the print button on the main menu toolbar to print the profile that is currently visible.

Note
- New Consumers are added via the File | New Consumer command.
- Consumer profiles may be deleted only via the Consumer Information:Delete function in Tools | Administrative | Record Management. When the consumer profile is deleted via Record Management, all information related to that consumer is deleted from the EC3 database. Maintain a copy of the consumer's record by using the Consumer Information: Archive function before deleting the record.
- If you are no longer using information for a consumer, but do not wish to permanently delete the information, you may use the Consumer Information: Hide function in Tools | Administrative | Record Management. The Hide function will insert a flag in the consumer's record that will keep that consumer's information from being listed on

the various forms. By using the Consumer Information: Show function, you may delete the flag so that the consumer's record is again available.

Adding a Consumer's Photo

A graphic file (for example, a scanned photo) saved as a bitmap (.bmp) file may be inserted into a consumer's Profile.

To insert a photo or change to a new photo
With the Profile window open and the consumer selected:
- Select the Edit button.
- From the General subsection select the button that looks like a camera. The New Consumer Photo dialog box will appear.
- Under File Name, type or select the name of the photo you want to insert. If you don't see the bitmap file you want, select a new drive or directory.
- Choose the OK button.

To remove a photo
With the Profile window open and the consumer selected:
- Select the Edit button.
- Double-click on the photo.

Note
For best results size the photo no wider than 250 and no taller than 300 pixels.

Service Eligibility

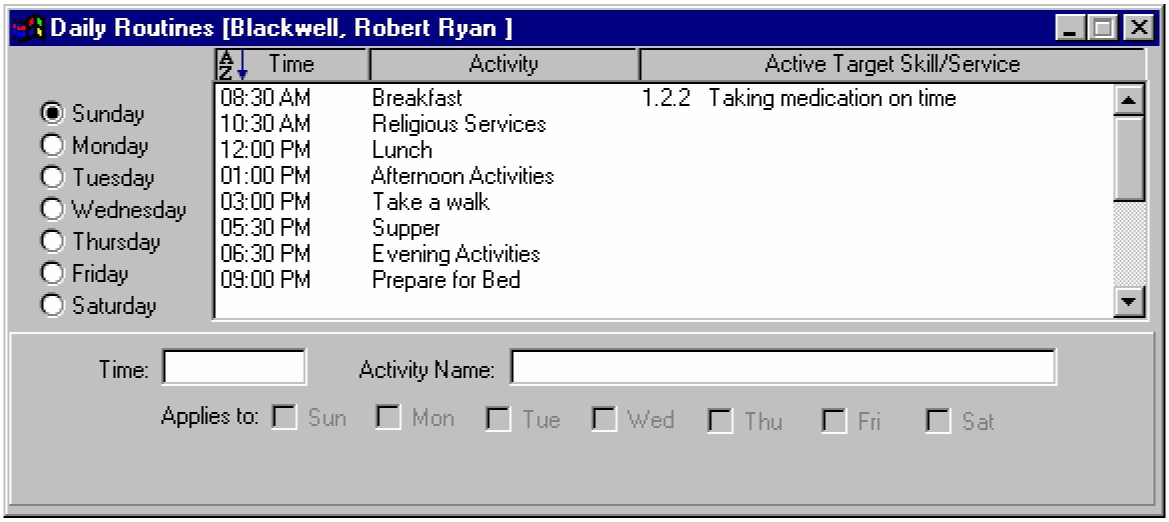
The "Service Eligibility for" screen displays a list of all service organizations, and the titles of the services each organization provides, a contact name and a phone number. Associated with each service is a display of qualifications. The "Service Eligibility for" screen is designed to assist the case manager and the consumer identify services that would meet the consumer's needs and for which the consumer would be eligible. Organization information on the "Service Eligibility for" screen originates from Specific Services in Resource Directory.

Daily Routines

Purpose
From the Daily Routines window, you may view the times and associated activities for a consumer's daily schedule. Routines may be different for each day of the week.

Getting There
Select Consumers | Daily Routines from the main menu; or you may click  in the toolbar at the bottom of the EC3 screen. If you use the toolbar to open the form when you have another Consumer form open to a specific consumer's data, the Daily Routines form will open with that consumer's data already selected..

Window Appearance
In the upper portion of the window are days of the week on the left and a list box with times, activities and Target Skills and Services from the consumer's plan which may have been scheduled for the selected day. In the lower portion of the window are details for a selected item in the list. The main menu contains a dropdown list of consumer names and toolbar buttons for editing.



Viewing and Editing
Select a consumer's name from the dropdown list on the main menu. The Sunday routines appear in the list in the window. You may select a different day of the week from the options on the left. If there are no activities for the consumer for a selected day, you will be given the choice to copy the Master Daily Routines or the consumer's routines for another day.

<u>To add a new time and activity:</u>

- Select a day of the week. The routines for the selected day appear in the list.
- Select New.
- Enter the new time and activity in the blank Time and Activity Name fields at the bottom of the window.
- Select Save.

<u>To modify a time and/or activity:</u>

- Select a day of the week. The routines for the selected day appears in the list.
- Select a time/activity from the list by highlighting it with the mouse. The time and activity fill in the fields at the bottom of the screen.
- Click on the Edit button and then modify the time of day and/or activity in the Time and Activity Name fields at the bottom of the screen.
- Select Save.

<u>To delete a time and activity:</u>

- Select an entry from the list.
- Select Delete.

Printing
To print the consumer's daily schedule to paper, go to File | Print It!. In the Report Group dropdown, select Consumer Information. In the Report Name list box, select Daily Schedule. Daily Routines may be printed with or without skills and services information. On the Select Records tab, select the consumer or consumers for whom you wish to have printed data.

Note
Target Skills and Target Services are integrated into daily routines (scheduled) from the Schedule button on the Start Up tab on the Target Skills & Services window.

Education

Purpose
The Education window displays information about a consumer's current and past educational settings.

Getting There
Select Consumers | Education from the main menu; or you may click in the toolbar at the bottom of the EC3 screen. If you use the toolbar to open the form when you have another Consumer form open to a specific consumer's data, the Education form will open with that consumer's data already selected.

Window Appearance
In the upper portion of the window is a list box with schools and attendance dates for a selected consumer. In the

lower portion of the window are details for a selected item in the list. There are three tabs on the Consumer Education window to help organize consumer education information. The main menu contains a dropdown list of consumer names and toolbar buttons for editing.

Tabs and Buttons

School [TAB]	school address, phone, etc.
Resource Directory [BUTTON]	selecting this button takes you to the Resource Directory window to add or edit an education resource
Placement [TAB]	school placement information (placement, date started, highest grade completed, etc.)
Note [TAB]	a short note related to the consumer's education

Viewing and Editing

Select a consumer's name from the dropdown list on the main menu. Select an item from the list and use the buttons on the main menu toolbar to perform add, edit, save and delete operations.

Printing

To print the education data to paper, go to File | Print It!. In the Report Group dropdown, select Consumer Information. In the Report Name list box, select Education. On the Select Records tab, select the consumer or consumers for whom you wish to have printed data.

Note

The School text box on the School tab must be filled by selecting from the dropdown list. If the school you wish to enter is not in the list, use the Resource Directory button to go to the Resource Directory. Enter the school name and other pertinent information there. When you return to the Education form, select the school name. You will then have the opportunity to autofill the other information

Employment

Purpose

The Employment window displays information about the consumer's employment such as job title, employer, start date and end date.

Getting There

Select Consumers | Employment from the main menu; or you may click  in the toolbar at the bottom of the EC3 screen. If you use the toolbar to open the form when you have another Consumer form open to a specific consumer's data, the Employment form will open with that consumer's data already selected..

Window Appearance

In the upper portion of the window is a list box with job title, employer, start date, and end date for a selected consumer. In the lower portion of the window are details for a selected item in the list. There are tabs on the Consumer Employment window to help organize consumer employment information. The main menu contains a dropdown list of consumer names and toolbar buttons for editing.

Tabs and Buttons

Job [TAB]	information about a job the consumer holds, such as job title, and start date
Employer [TAB]	employer information, such as organization name, and phone
Resource Directory [BUTTON]	selecting this button takes you to the Resource Directory window to add or edit an employment resource
Notes [TAB]	a short note related to the consumer's employment

Viewing and Editing

Select a consumer's name from the dropdown list of names on the main menu toolbar. The list is filled out with the consumer's employment information. Select an item from the list and use the buttons on the main menu toolbar to perform add, edit, save and delete operations.

Printing

To print the employment data to paper, go to File | Print It!. In the Report Group dropdown, select Consumer Information. In the Report Name list box, select Employment. On the Select Records tab, select the consumer or consumers for whom you wish printed data.

Note

- The Employer text box on the Employer tab must be filled from the dropdown list. If the employer you wish to enter is not in the list, you may use the Resource Directory button to open the form and enter the employer and other pertinent data. When you return to the Employment form, the employer will be in the list and you will have an opportunity to add the other data by using autofill.

- EC2 users will notice that Employment information has been moved from the Consumer Profile to this window.

Medications

Purpose

The Medications window allows you to view or modify the list of a Consumer's medications and associated information.

Getting There

Select Consumers | Medications from the main menu; or you may click in the toolbar at the bottom of the EC3 window. If you use the toolbar to open the form when you have another Consumer form open to a specific consumer's data, the Medications form will open with that consumer's data already selected.

Window Appearance

In the upper portion of the window is a list box with medication records for a selected consumer. In the lower portion of the window are details for a selected item in the list. There are tabs on the Consumer Medication window to help organize consumer medication information. The main menu contains a dropdown list of consumer names and toolbar buttons for editing.

Tabs and Buttons

General [TAB]	This information will autofill if a medication from the Medication Library is selected.
Medication Library [BUTTON]	Opens the Medication Library form to allow entering medication information.
Show Food/Drug Interactions	Will show food/drug interactions for the selected medication, if that information has been previously entered into the Medical Library.
Administration [TAB]	Information about the medication's form, dose (dose range autofills if a medication from the Medication Library is selected), frequency of administration within a day, and route of delivery
Notes [TAB]	Information about the medication related to the consumer.
Side Effects [TAB]	This information will autofill if a medication from the Medication Library is selected.
Pharmacy [TAB]	This information will autofill if a pharmacy from the Resource Directory is selected.
Resource Directory [BUTTON]	Opens the Resource Directory form so that pharmacy information may be entered.
email [BUTTON]	Click the button to generate an email message, if an email addresss is available.

Viewing and Editing

Select a consumer's name from the dropdown list of names on the main menu toolbar. The list is filled with medications. Select an item from the list and use the buttons on the main menu toolbar to add a new medication, edit information for a medication already entered, save new or edited information, or delete medication(s).

Printing

To print the medication data to paper, go to File | Print It!. In the Report Group dropdown, select Consumer Information. In the Report Name list box, select one of the Medications reports. You may click on each report to see a description of the information it will print. On the Select Records tab, select the consumer or consumers for whom you wish to have printed data. Click the Print button to view the report. Use the icons at the top of the Crystal Reports Viewer to print or export the report.

Note

- Medication information may be entered in the Medication Library so that it will be available to others to autofill the Medications form. Such information should be from an approved source and should give generic information, for example it should list all conditions for which a medication may be used, and should give dosage ranges rather than a specific dose.
- If the medication library is used to autofill the information for a consumer's medication, the consumer's entry (the Medications form) should be corrected to reflect the correct information for the specific consumer.
- The pharmacy name on the Pharmacy tab may only be filled from data in the Resource Library. If the pharmacy you wish to enter is not available in the dropdown list, use the Resource Directory button to open the Resource Directory. Enter the pharmacy name and other pertinent information and save it. When you return to the Medications form, you may select the pharmacy name from the dropdown. You will be given the opportunity to complete the other information by autofill.

Relationships

Purpose
The Relationships window allows you to view or modify the list of a consumer's friends, relatives, etc.

Getting There
Select Consumers | Relationships from the main menu; or you may click in the toolbar at the bottom of the EC3 window. If you use the toolbar to open the form when you have another Consumer form open to a specific consumer's data, the Relationships form will open with that consumer's data already selected.

Window Appearance
In the upper portion of the window is a list box with relationship information for a selected consumer. In the lower portion of the window are details for a selected item in the list. There are tabs on the Consumer Relationship window to help organize consumer relationship information. The main menu contains a dropdown list of consumer names and toolbar buttons for editing.

Tabs and Buttons
General [TAB]	name, relationship, home address, city, state, zip, phone, cell phone, e-mail, and birthday (month and day). Agency (see Note below), business address, phone, pager, and fax number.
Resource Directory [BUTTON]	Opens the Resource Directory form so that agency information may be entered.
e-mail [BUTTON]	Click the button to generate an e-mail message, if an e-mail address is available.
Notes [TAB]	a note about this specific relationship.

Viewing and Editing
Select a consumer's name from the dropdown list of names on the main menu toolbar. Select an item from the list and use the buttons on the main menu toolbar to add a new relationship, edit information for a relationship already entered, save new or edited information, or delete the selected relationship.

Printing
To print relationships data to paper, go to File | Print It!. In the Report Group dropdown, select Consumer Information. In the Report Name list box, select Relationships. On the Select Records tab, select the consumer and the relationships for whom you wish to have printed data.

Note
The Agency textbox on the General tab must be filled by selecting an agency from the dropdown list. If the agency you wish to enter is not in the list, click the Resource Directory button to open the Resource Directory form, then enter and save the agency name and other pertinent information. When you return to the Relationships form, the agency name will appear in the dropdown list. After you select it, you will have an opportunity to autofill the other agency information from the information you have entered in the Resource Directory.

Notes

Purpose
Consumer Notes permits users to enter notes and identify them by subject. Notes may be a record of meetings, phone calls, remarkable events, and so forth regarding a consumer. Notes also offers a handy way to bill for some services.

Getting There
Select Consumers | Notes from the main menu; or you may click in the toolbar at the bottom of the EC3 window. If you use the toolbar to open the form when you have another Consumer form open to a specific consumer's data, the Notes form will open with that consumer's data already selected.

Window Appearance
In the upper portion of the window is a list box with consumer notes (date, time, subject, and author) for a selected consumer. In the lower portion of the window are details for the selected item in the list, including the text of the note, and a check box indicating whether or not the note has been billed. The main menu contains a dropdown list of consumer names and toolbar buttons for editing.

Buttons
Billing Information [BUTTON]	Use this button to enter, view or edit billing information (see Note below for details about using this button).
Message (letter) [BUTTON]	Opens a dialog box showing all EC3 users. Those the user selects will be sent an automatically generated message or e-mail (depending on how your EC3

Administrator has set your EC3 Preferences) calling attention to the selected note.

Viewing and Editing

Select a consumer's name from the dropdown list of names on the main menu toolbar. Notes for the selected consumer appear in reverse chronological order in the list. Notice that, by default, notes are sorted by date with the most recent date first. You may sort the notes differently by clicking the various headings. Select an item from the list and use the buttons on the main menu toolbar to add a new note (see Note below), edit a note already entered, save new or edited information, or delete the selected note. (Only the author of a note may edit or delete it, however depending on how your local EC3 Administrator has set EC3 preferences, it may not be possible to change a note once it is saved.)

Searching

To search for notes using words or character strings, click search in the toolbar. Click in the appropriate check boxes to search in the note, in the subject, or in both. Type one or more words (or parts of words or groups of characters). If you have selected "any of these words" the search will locate all notes that contain any one of the words you typed. If you selected "all of these words" the search will locate only those notes that contain all the words you typed. The search is not case sensitive, but it will locate only words spelled exactly as you have spelled them. After the search, only notes containing the search string(s) will be displayed in the Consumer Notes list box. To cancel the search and again display all notes, press the search button and on the search screen press Cancel/Undo; or you may reselect the consumer in the Select Consumer dropdown list.

Printing

To print notes, select (highlight) the note or notes you wish to print and press the print icon on the toolbar. Use of the search option and/or the various sort options will help you quickly select just the notes you wish to print. To select multiple notes, press and hold your left mouse button while you scroll over the notes, or hold down the Shift key or the CTRL key while you click on notes

Note

- Each new entry is automatically tagged with the current date and time, and the author's (EC3 user's) name. It may be possible to enter a different date, depending on how your EC3 Administrator has set EC3 Preferences.
- You may enter Billing Information for a Note by first clicking the Edit button, then selecting the Billing Information button in the lower right corner of the Note window. If the note has already been billed, the Billing Information button may be used to view the billing information, or the billing information may be edited if the Edit button has been clicked.

Billing Information (from Consumer Notes form)

Purpose

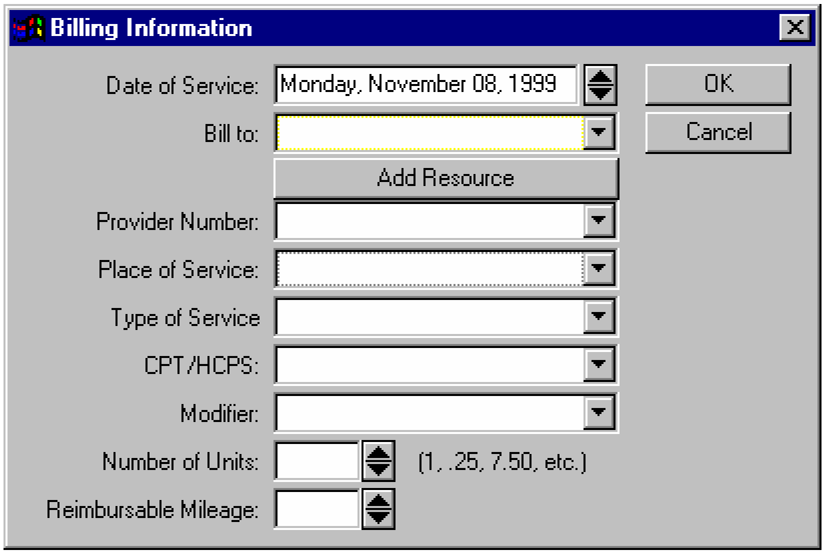
From the Billing Information window, you can add, view and edit billing information to any saved note for a consumer. Service Coordinators and other human service professionals may use this area to keep track of time spent conducting billable activities for consumers.

Getting There

On for Consumer Notes form, select a consumer note for which billing information has already been added; or click the edit button and select a consumer note for which you wish to add billing information. Click the Billing Information button.

Window Appearance

The window contains fields for entering and/or selecting information.



Editing and Viewing
Enter or edit the appropriate information. Select OK when finished.

Date of Service defaults to the date of the note. It may be modified by using the up/down arrow or typing.

Bill to... must be filled from the dropdown list, which is drawn from the Resource Directory. If the agency you wish to bill to is not present, click Add Resource to navigate to the Resource Directory to add the information needed.

Provider Number may be filled from the dropdown list (from Resource Directory) or typed.

Place of Service must be filled from the dropdown list. The list may be edited in the Place of Service form.

Type of Service may be filled from the dropdown list or typed. The list is identical to the Note Subject list.

CPT/HCPS and Modifier may be filled from the dropdown or typed. Items typed in will subsequently be available in the dropdown list.

For Number of Units and Reimbursable Mileage, use the up/down arrows or type the information.

Note
- Depending upon the way in which the Preferences are set, the author may not be able to edit a saved consumer note.
- Since only the author of a consumer note may edit the note, only the author may add or edit billing information from the Consumer Notes window. Anyone with edit permission may edit billing information via Tools | Agency Billing.
- To enter billings for a consumer, there must be an organization in Resources that funds services.

Budgeting

Purpose
From the Budgeting window, information about the consumer's income and expenses can be entered and edited, and the balance (income minus expenses) can be calculated.

Getting There
Select Consumers | Budgeting from the main menu; or you may click  in the toolbar at the bottom of the EC3 window. If you use the toolbar to open the form when you have another Consumer form open to a specific consumer's data, the Budgeting form will open with that consumer's data already selected.

Window Appearance
There are three tabs on the Budgeting window to help organize the information. The main menu contains a dropdown list of consumer names and toolbar buttons for editing.

Tabs and Buttons

Income [TAB]	organizes sources of income information
Expenses [TAB]	organizes expense information
Use EC3 Default Income (Expense) Categories [BUTTON]	fills the grid with default income (expense) items, each of which may be modified
Compute Income (Expenses) Now! [BUTTON]	calculates income (expense) subtotals and totals on the grid

Subtotal Income (Expenses) by [RADIO BUTTON]	select whether to calculate subtotals and totals by day, month, week, or year
Balances [TAB]	displays a Balance Sheet (Income minus Expenses)
Calculate Balances Now! [BUTTON]	calculates income, expenses and balances by day, week, month and year

Viewing and Editing

Select a consumer name from the dropdown list on the main menu. The consumer's latest budget (if any) appears.

To enter income (expenses) for a consumer, click the Edit button on the main menu toolbar. Click the Use EC3 Default Income(Expenses) Categories button to fill the income (expenses) tab with categories and items, or add your own categories and items. Edit the Amount and per columns in the Income and Expenses grid to reflect the consumer's actual income and expenses.

To edit an individual cell in the grid, select a cell by clicking in it or navigating to it with the arrows on your keyboard, then click in the editing textbox (to the right of the X button) to type information in the cell. Click on the X button to delete the information in the selected cell.

Notice that, when editing cells in the "per" column, you must select an item from a dropdown list. In most cases, the per column is used to specify the period of time in which the amount is earned (spent). However if you select "subtotal" or "total" in the per column, the corresponding "amount" will be calculated automatically when you click the Compute Income(Expenses) Now! button and it will be calculated for the period of time selected in the Subtotal Income (Expenses) by... radio button.

You may use the buttons above the grid to insert a row below the selected cell or delete the row of the selected cell. Select the Save button on the main menu toolbar to save changes.

Note

You may only edit information on the Income and Expense tabs. You may then recalculate balances on the Balance tab.

Incident Reporting

Purpose

The Incidents window allows you to enter and view information about incidents and to write follow-up reports.

Getting There

Select Consumers | Incidents from the main menu; or you may click in the toolbar at the bottom of the EC3 window. If you use the toolbar to open the form when you have another Consumer form open to a specific consumer's data, the Incidents form will open with that consumer's data already selected.

Window Appearance

In the upper portion of the window is a list box of incidents for a selected consumer listed by date reported, the date the incident occurred, who reported it and the date it was followed up. In the lower portion of the window are details for a selected item in the list. There are tabs on the Consumer Incident window to help organize the consumer's incident information. The main menu contains a dropdown list of consumer names and toolbar buttons for editing.

Tabs and Buttons

General [TAB]	Enter today's date and time, the date and time of the incident, others involved or present at the incident, the location of incident and the person(s) who reported the incident.
Type [TAB]	Enter the incident type(s). Incident types must be entered by using the buttons at the bottom of the tab.
Add Incident Type [BUTTON]	Click the button to select from the incident type list. Select one or more items in the list and click OK to add them to the incident report.
Delete Incident Type [BUTTON]	Select one or more incident types on the Type tab and click the button to delete them.
Details [TAB]	Enter a description of the incident, what occurred just prior to the incident and what action, if any, was taken in response to the incident. If Restraint Used is checked, the box following may be used to describe the restraint.
Injury [TAB]	Enter a description of the injury, the location of the injury on the body (may be selected from drop down list or typed), and any treatment required.
Notification [TAB]	Send a message about the incident report and use the large text box to enter notes about the people and agencies notified.
Message (letter) [BUTTON]	Opens a dialog box showing all EC3 users. Those the user selects will be sent an automatically generated message or e-mail (depending on how your EC3

Administrator has set your EC3 Preferences) calling attention to the incident report.

Follow Up [TAB] An incident may have more than one follow-up. Use the buttons at the bottom of the tab to Add, Edit or Delete follow-up data. For each follow-up enter corrective action taken, the date, and by whom.

Viewing and Editing

Select a consumer's name from the dropdown list of names on the main menu toolbar. The list is filled with information on incidents for that consumer. Select an item from the list and use the buttons on the main menu toolbar to add a new incident, edit information for an incident already entered, save new or edited information, or delete the selected incident.

Printing

To print incidents data to paper, go to File | Print It!. In the Report Group dropdown, select Incidents. In the Report Name list box, select one of the Incidents reports. You may click on each report to see a description of the information it will print. On the Select Records tab, select the consumers, dates, or types of incident for which you wish to have printed data.

Add Incident Type

Purpose

To categorize an Incident report via agency-defined incident types.

Adding Incident Types

Select one or more from the list box. Select the OK button

Consumers: Incident Follow Up

Location

Follow Up tab of Consumer Incidents form.

Purpose

To record follow up actions to incident reports. Multiple follow ups may be added to each incident report.

Adding follow up information

Click Add Follow Up.

The Incident Follow Up form will open. Add data as needed.

Auto-fill items:	Follow Up By: <your name>	(Depending on how your EC3 administrator has set EC3 Preferences, you may or may not be able to modify this item.
	Date: <today's date>	(May be modified.)
	Appropriate Agency Notified:	check if another agency has been notified.
	Agency Name:	agency that has been (or will be) notified.
	Follow Up:	follow up actions performed.
	Corrective Action:	corrective actions taken.

Click OK to save data and exit, Cancel to exit without saving.

Viewing follow up information

Click on the desired item to select it, then click View Selection.

The Incident Follow Up form will open displaying previously entered data.

Editing follow up information

Click on the item to be edited to select it, then click Edit Selection.

The Incident Follow Up form will open displaying previously entered data which may be edited.

Click OK to save data and exit, Cancel to exit without saving.

Deleting follow up information

Click on the item to be deleted to select it, then click Delete Selection.

When asked if you wish to delete the item, click Yes.

Service Participation

Purpose
The Service Participation window allows you to see information about the programs in which the consumer is currently or was participating. The program provider and service may be any organization and specific service entered in the Resource Directory.

Getting There
Select Consumers | Service Participation from the main menu; or you may click in the toolbar at the bottom of the EC3 window. If you use the toolbar to open the form when you have another Consumer form open to a specific consumer's data, the Service Participation form will open with that consumer's data already selected.

Window Appearance
In the upper portion of the window is a list of records with provider name, service name, start date, and end date for a selected consumer. In the lower portion of the window are details for a selected item in the list. There are tabs on the Service Participation window to help organize the information. The main menu contains a dropdown list of consumer names and toolbar buttons for editing.

Tabs and Buttons

General [TAB]	provider/service information, including name, address and phone number
Resource Directory [BUTTON]	selecting this button takes you to the Resource Directory window to add or edit a program resource
Copy Service from . . . [BUTTON]	(visible when editing) This button will open a dialog which allows you to select another consumer from which you may copy a service. All data, including start and end date will be copied.
e-mail [BUTTON]	Click the button to generate an e-mail message, if an e-mail address is available.
Details [TAB]	additional information, including the date the program was started and/or ended.
Note [TAB]	a note related to consumer's participation in this program

Viewing and Editing
Select a consumer's name from the dropdown list of names on the main menu toolbar. The window list is filled with Service Participation information. Select an item from the list and use the buttons on the main menu toolbar to add a new service, edit information for a service already entered, save new or edited information, or delete the selected service.

Printing
To print service participation data to paper, go to File | Print It!. In the Report Group dropdown, select Consumer Information. In the Report Name list box, select one of the Service Participation reports. You may click on each report to see a description of the information it will print. On the Select Records tab, select the consumers, services, or agencies for which you wish to have printed data. Click the Print button to view the report. Use the icons at the top of the Crystal Reports Viewer to print or export the report.

Note
The Provider and Service text boxes on the General tab must be filled using the dropdown list. If the provider and service you wish to select are not available in the list, use the Resource Directory button to navigate to the Resource Directory form. Enter and save provider and service information and other pertinent information. When you return to the Service Participation form the provider and service will be available in the list. When you select a service, the additional information will be made available to autofill other information.

Consumer Forms

Purpose
To create, edit and view documents that are associated with a particular consumer. Documents may be created from scratch or started from a form that was developed in the Agency Form Designer.

Getting There
Select Consumers | Consumer Forms from the main menu; or you may click in the toolbar at the bottom of the EC3 window.

Window Appearance
Shows the first page of the selected document or an icon for your default word processor. The main menu contains a dropdown list of consumer documents and toolbar buttons for editing.

Viewing and Editing
To add a new consumer document: Click the New  button on the main menu toolbar. New Consumer Form will open. Select the consumer's name from the Consumer dropdown list. If you wish to use an Agency Form, select the name of the form from the Form Name dropdown list. If you wish to create your own document, type the document name you wish to use in the Form Name box. Enter the date of the form or accept the default (today's date). Click OK. (See Note below)

To view an existing consumer document, select the document from the drop-down list on the main menu. Consumer documents are identified by consumer name, form name and date created. Only the first page of the document will be visible. To view the entire document, click the Edit button on the main menu.

To modify an existing consumer document, first view the document, then click the Edit  button on the main menu. (See Note below)

To delete a document, view it, then use the delete button on the main menu to delete it.

Printing
You may print consumer forms by opening them in edit mode, then using your default word processor program to print them as you would any other document. Or you may use File | Print It!. In the Report Group dropdown, select Consumer Forms. Select the form you wish to print and click the Print button. Use the icon at the top of the Print Preview screen to print the report.

Note
When a consumer form is added or edited, the document will open in your default word processor program, such as Microsoft Word or Word Perfect. Use your word processor program's save command to save your modifications. EC3 will automatically give the document a file name. When saving the document, always use the Consumer Form file name supplied by EC3, so the document may be retrieved and backed up properly.

New Consumer Form

Purpose
To identify a new consumer form by consumer name, form name and date created. You may create a new blank form or create a form which is a copy of an existing Agency Form (template).

Window Appearance
The New Consumer Form window contains three data entry boxes to enter the consumer's name, a form name and the creation date.

Creating a New Consumer Form
Select the name of a consumer from the top list. Either select an agency form from the middle list (copy of an existing agency form) or type in a name of your choice for a blank form. The date box is filled in automatically with the current date, but you may change it. Select the "Add" button

EC3 then transfers back to the Consumer forms window and displays either
- An existing form, if an agency form was selected, or
- A blank form, if you entered a name of your own choosing.

The new Consumer form may edited by selecting the Edit button.

Planning Menu Commands

Planning: Getting Started

The elements of the Plan are:

Cover Page

Plan Text

Target Skills & Services, including data entry, analysis and review

Quarterly Reviews of the Plan

Before editing or adding to a plan, the plan must first be created using the Tools | Planning Schedule window.

Cover Page

Purpose

From the Cover Page window you can create a Cover Page document based on selections made in Cover Page Designer . (Before a cover page can be created, a plan must be scheduled.)

Getting There

Select Planning | Cover Page from the main menu.

Window Appearance

Shows the first page of the selected form or an icon for your default word processor program.

Viewing and Editing

Select a consumer's Name (Plan Date) from the dropdown list of name and effective plan dates on the main menu toolbar.

If the Cover Page is being accessed for the first time, EC3 creates the Cover Page. Once created, the Cover Page may be edited like a word processing document. Click the edit button in the main menu toolbar to open the document in your word processor program such as Microsoft Word or Word Perfect. Saving the document in the word processor program saves it for EC3.

Printing

You may print individual cover pages by opening them in edit mode, then using your default word processor program to print them as you would any other document. Or you may use File | Print It! to print one or more cover pages. In the Report Group dropdown, select Planning. In the Report Name list box select Cover Pages. Use the Select Records tab to select the cover page or pages you want to print (press <shift> to select adjacent pages, <ctrl> to select nonadjacent pages). Click the Print button. Use the icon at the top of the Print Preview screen to print the pages.

Note

- Changes to the Cover Page do not affect the consumer's Profile. The Cover Page may be viewed at any time and may be modified up to the effective date of the plan. Once the plan's effective date has passed, it may still be possible to edit the Cover Page, depending on selections made in the Preferences window.
- When a Cover Page is added or edited, the document is automatically given a file name. When saving the document, always use the Cover Page file name supplied by the EC3, so the document may be retrieved and backed up properly.

Plan Text

Purpose

From the Plan Text window you can create a Plan Text document based on selections made in Planning Schedule. See Note below. (Before a plan text can be created, a plan must be scheduled.)

Getting There

Select Planning | Plan Text from the main menu; or you may click in the toolbar at the bottom of the EC3 window.

Window Appearance

Shows the first page of the selected form or an icon for your default word processor.

Viewing and Editing

Select a consumer's Name (Plan Date) from the dropdown list box on the main menu toolbar. Use the edit button in the main toolbar to open the document in your default word processor program. Saving the document in the word processor program saves it for EC3.

Note

- The first time you select Plan Text for a consumer whose plan has just been scheduled, the document starts out identical to the originating Plan Template selected in Planning Schedule. (If a Plan Template was not selected in Planning Schedule then Plan Text will be blank.)
- When scheduling the next plan in the Planning Schedule form, the Plan Text may be carried over from one planning period to the next for a consumer.
- Individualizing the Plan Text does not affect the original Plan Template.
- The Plan Text may be viewed at any time and modified up to the effective date of the plan. Once the plan's effective date has passed, it may or may not be possible to edit a Plan Text, depending on selections made in Preferences.
- When a Plan Text is added or edited, the document is automatically given a file name. When saving the document, always use the Plan Text file name supplied by the EC3, so the document may be retrieved and backed up properly.

Printing

You may print individual plans by opening them in edit mode, then using your default word processor program to print them as you would any other document. Or you may use File | Print It! to print one or more plans. In the Report Group dropdown, select Planning. In the Report Name list box select Plan Text. Use the Select Records tab to select the plan or plans you want to print (press <shift> to select adjacent plans, <ctrl> to select nonadjacent plans). Click the Print button. Use the icon at the top of the Print Preview screen to print the plans.

Target Skills & Services

Purpose

From the Target Skills & Services window you can create, modify, and schedule targets addressing acquisition of skills and provision of services. For each skill or service you may enter progress data, write review notes, and create billings based on delivery.

Getting There

Select Planning | Target Skills & Services from the main menu; or you may click in the toolbar at the bottom of the EC3 window.

Window Appearance

In the upper portion of the window is a list box with scheduled target skills/services for a selected consumer. In the lower portion of the window are details for a selected item in the list.
The lower portion of the window is organized with 8 tabs. Six of the tabs (General, Start Up, Method, Components, Assistance, and Instructions) are for describing the goal or target (skill or service). The other two tabs (Data Entry and Review Notes) are for assessing progress towards meeting the goal or target. The tabs may or may not be active depending on whether you are viewing/creating a skill, service or goal.

Tabs and Buttons

New Data [BUTTON]	(active only when a skill/service is selected in the form list box) opens the New Data Setup form to prepare the data entry grid.
New Review Note [BUTTON]	(active only when a skill/service is selected in the form list box) opens the Review Note form to enter a note on the Review Note tab
General [TAB]	general information about a target skill or service
Start Up [TAB]	responsible person, date of service, other agency providing service, days in the review period
Schedule [BUTTON]	(visible only when a skill/service is selected in the form list box) Use this button to place a target skill on the consumer's Daily Schedule
Method [TAB]	For target skills, includes information about reinforcer, materials, teaching method (a specific procedure or approach to teaching) and data type (what is recorded to indicate progress)
Components [TAB]	lists the required components (e.g.., steps of a task analysis, questions & answers, successive approximations) for a Target Skill using a

	Forward Chaining, Backward Chaining, Total Task, or Shaping Teaching Method
Assistance [TAB]	for a Target Skill that is being taught with assistance, modify the levels of assistance here
Instructions [TAB]	starting date, general instruction, and data entry
Data Entry [TAB]	progress data obtained during the course of strategy implementation for the Target Skills and Target Services of a consumer's plan; the Data Entry command presents a data input window formatted to match the strategy
Create Billing for Selected Data [BUTTON]	opens Billing Information form so you may bill a training session to Agency Billing.
Analyze Data [BUTTON]	opens the data analysis form where you may create tables and graphs that summarize data by sessions, by day, etc.
Edit Selected Data {BUTTON]	reopens data entry grid with the selected data so it can be edited.
Delete Selected Data [BUTTON]	deleted the selected data
Review Notes [TAB]	review date, review period, and reviewer
View Selected Note [BUTTON]	Opens the selected note in the Review Note form so you may read the note text.
Edit Note [BUTTON]	Open the selected note in the Review Note form so it can be edited, if allowed. (See Note below)
Delete Note [BUTTON]	Deletes the selected note, if allowed. (See Note below)

Viewing and Editing
Select a consumer's name and plan date from the dropdown list box on the main menu toolbar.

To add a new goal, skill or service, click the new button in the main menu toolbar. The New Target choice bar appears, giving you a choice of ways to enter data.

To modify a goal, skill or service, select the item from the list, click the edit button on the main menu toolbar and make the necessary changes.

To save a goal, skill or service that is new or has been modified, click the save button on the main menu toolbar.

To delete a goal, skill or service, select it and click delete on the main menu toolbar. (See Note below)

Printing
To print the target skills and services data to paper, go to File | Print It!. In the Report Group dropdown, select Planning or Plan Implementation or Review. In the Report Name list box, select one of the reports. You may click on each report to see a description of the information it will print. Use the Select Records tab to select the specific data you wish to print Click the Print button to view the report. Use the icons at the top of the Crystal Reports Viewer to print or export the report.

Note
- You must be editing a target to enter data or write a review note.
- You may delete Target Skills that have no associated data.
- Only the Review Note author may edit or delete a review note. Your EC3 Administrator may have set EC3 Preferences so that review notes may not be edited or deleted, even by the author.

New Target
Select the New Goal option to create a goal.

Select the Skill/Service Wizard option to use the EC3 Skill/Service Wizard to help you create the Target Skill.

Select Import. to copy a Target Skill or Service from a previous plan.

Select I'll do it myself, thanks! to go directly to the new Target Skill or Service and work on it yourself.

New Goal
A Goal is a major outcome to be expected for the individual consumer. It is used for grouping similar Target Skills and Target Services together. It may contain a brief goal statement and mm/yy expected completion date.
A goal is a higher-level target, a target under which other targets may be nested.

To complete the "New Goal" screen, enter Number, Title, Start date and Expected Completion date; then click "OK".

I'll Do It Myself Thanks!

Choosing I'll do it myself, Thanks! allows you to create a Target Skill or Service of your own design. For Target Skills and Target Services that are not developed with the aid of the Skill/Service Wizard, EC3 creates the printed strategy report using information you provide in the following fields:

Materials

Reinforcers

Starting Instruction

General Instructions: Enter the information you wish to appear on the printed strategy. Indicate: how to proceed with teaching the skill or delivering the service. For a skill include an overview of what is being taught; what teaching methodology to use; how to begin a trial; how to address learner errors; and when to use reinforcement.

Instructions for Recording Data: Enter the information you wish to appear on the printed Strategy. Address how to collect information for later input into the EC3 data entry area, consisting of the following fields - Date, Time, Trial, and Score.

Assistance (Target Skills): Assistance is the degree of help provided to the learner to successfully complete a behavior or component of a task (e.g., verbal instruction, gesture, light physical touch, full physical guidance through the correct response). The set of levels of assistance may originate from Master Levels of Assistance or may be created in the Assistance subsection of Target Skills. Levels of assistance may be edited, including changes in codes, wording, and the number of levels (e.g., adding more levels or deleting some levels). These changes must be done before data is collected and entered in Consumer | Planning | Target Skills/Services (Data Entry Tab).

Strategies: A Strategy is an EC3 printed report comprising instructions for how to teach a Target Skill or how to provide a Target Service specified in the consumer's plan. The content of a strategy report is determined by choices made in the Skill/Service Wizard. Distribute the printed strategy and matching data sheet report to direct services personnel to collect data away from the computer. Transfer data from data sheets to Data Entry at your convenience, prior to conducting Data Analysis & Review.
Once a Target Skill/Service objective is created for a consumer's plan, you may print preview the Strategy report via the EC3 Print manager.

To print a strategy

1. Select the Plan, Implementation & Review group from the list in EC3 print manager.
2. Select one of either Strategies or Strategy/Data Sheet (Combined).
3. Select a Consumer - Plan (Date) from the list.
4. Select a Target Skill or Target Service.
5. Select OK.
6. Indicate the number of copies.
7. Select Print.
8. Select Done to close the EC3 Print manager.

Strategy Report sections:
- Objective
- Components
- Starting Instruction
- Materials
- Levels of Assistance
- General Instructions
- Reinforcers
- Instructions for Recording Data

Data Type

Data type alternatives depend on the teaching method and levels of assistance:

Teaching Method	Levels of Assistance	Data Type(s)
Shaping, Forward/Backward Chaining	most to least = least to most = none =	component & correct/incorrect component & level of assistance component & correct/incorrect
Total Task	most to least = least to most = none =	component & correct/incorrect component & level of assistance component & correct/incorrect
increase single target behavior	most to least = least to most = none =	correct/incorrect level of assistance correct/incorrect duration frequency latency
decrease single target behavior	none =	correct/incorrect duration frequency latency

Target: Scheduling

Target Skills may be represented as part of a consumer's Daily Routines by selecting the entry in the list box, selecting the Edit button, and then selecting Tools | Schedule Target Skill/Service.

Billing Information (Target Skills and Services)

Purpose

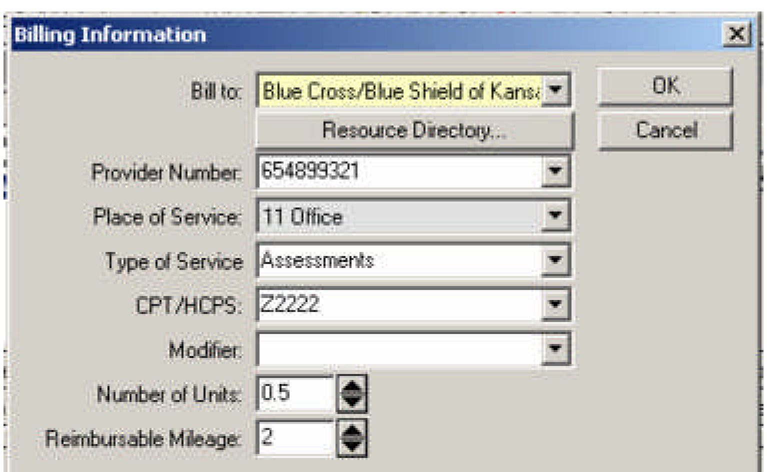
From the Billing Information window, you can add, view and edit billing information for services provided, corresponding to data entered via Data Entry for a selected Target Skill or Service.

Getting There

From the Target Skills and Services window select a consumer's name & plan date from the main menu. In the list box, select the Target Skill or Service for which you wish to bill. Click the Edit button. Select the Data Entry tab. Highlight the items in the data list which you care to bill. Press the Create Billing for Selected Data... button. (See Note below)

Window Appearance

The window contains fields for entering and/or selecting information.



Creating a Billing

Complete the information in the Billing Information dialog box and click OK.

Bill to... must be filled from the dropdown list, which is drawn from the Resource Directory. If the agency you wish to bill to is not present, click Add Resource to navigate to the Resource Directory to add the information needed.

Provider Number may be filled from the dropdown list (from Resource Directory) or typed.

Place of Service must be filled from the dropdown list. The list may be edited in the Place of Service form.

Type of Service may be filled from the dropdown list or typed. The list is identical to the Note Subject list.

CPT/HCPS and Modifier may be filled from the dropdown or typed. Items typed in will subsequently be available in the dropdown list.

For Number of Units and Reimbursable Mileage, use the up/down arrows or type the information.

Note
To bill for a Target Skill or Service, the Billable check box on the Start Up tab must be checked.

Quarterly Reviews

Purpose
From the Quarterly Review window you can review a consumer's overall progress on the plan for each quarter of the planning year. (Before quarterly reviews can be created, a plan must be scheduled.)

Getting There
Select Planning | Quarterly Reviews | 1st (2nd, or 3rd) Quarter from the main menu.

Window Appearance
Shows the first page of the selected form or an icon for your default word processor.

Viewing and Editing
Select a consumer's name and plan date from the dropdown list box on the main menu toolbar. Use the edit button to open the document in your word processor. Saving the document in the word processor saves it for EC3.

Note
When a Quarterly Review is added or edited, the document is automatically given a file name. When saving the document, always use the Quarterly Review file name supplied by the EC3, so the document may be retrieved and backed up properly.

View Menu

Shortcut Bar

The Shortcut Bar contains buttons that provide shortcut access to the most commonly-used commands on the EC3 menus. The tool bar appears at the bottom of the EC3 window. By resting your cursor on a button, you will see a yellow "tooltip" that tells you what the button controls. For instance, if you count from the left, the buttons in the third through the twelfth position control the windows on the Consumer menu.

To display or hide the shortcut bar

You can add/remove the Shortcut Bar from the EC3 window by selecting/deselecting View | Shortcut Bar from the main menu.

Reminders (View menu)

Purpose

The Reminders window allows you to track meetings, reviews due, and Target Skills & Services to which you have been assigned responsibility via Reminders. The Reminders window will show automatically whenever you sign on depending on selections made in Preferences.

Getting There

Select View | Reminders from the main menu.

Window Appearance

There are three tabs on the Reminders window to help remind you important things you might need to do.

Tabs and Buttons

Things to Do [TAB]	Permits each user to keep a user-defined list of activities s/he needs to accomplish by entering a personalized list of things to do organized by Date, Item, Due Date and Date Completed.
Reviews [TAB]	A listing of the next review date for all Target Skills/Services for which the user is the designated the Reviewer. Each Target Skill or Target Service lists in chronological order by Review Note due date, and includes the consumer name and Target Skill or Target Service number. Double-clicking on an item in the list automatically takes you to the Review Note window where you may complete the review.
Meetings [TAB]	A listing of upcoming planning meetings of consumers to whom the user is assigned, originating from Planning Schedule. The listing is in chronological order by meeting date and includes the consumer name, time, and location of the meeting. As meeting dates pass, items are automatically deleted from the list.
Assignments [TAB]	A day-by-day listing of scheduled consumer Target Skills/Services for which the user has been designated Responsible Person. The listing is in chronological order by time within each day of the week, and includes the title, number and consumer name.

Timers

Purpose

To permit the timing of up to two independent events.

Getting There

The timers are displayed in the lower right corner of the EC3 main window. The timer display is toggled on and off at View | Timers.

Operation

- Click on either timer to start the timer.
- Click a second time to pause the timer.
- Double-click the timer to re-start the timer.
- Each timer operates independently of the other

Tools Menu

Administrative

Customize

Master Daily Routines

Purpose

When creating a schedule of Daily Routines for a consumer, EC3 offers you the option to copy the set of Master Daily Routines as a basis from which to individualize them. EC3 comes with generic routines for each day of the week.

Getting There

To modify the set of Master Daily Routines, select Tools | Administrative | Customize from the main menu. Select the Daily Routines tab on the Customize window.

To add a new time and activity

1. Select a day of the week. The routines for the selected day appears in the list box.
2. Select New.
3. Enter the new time and activity in the blank Time and Activity Name fields at the bottom of the window.
4. Select Save.

To modify a time and/or activity

1. Select a day of the week. The routines for the selected day appears in the list box.
2. Select a time/activity from the list by highlighting it with the mouse. The time and activity fill in the fields at the bottom of the screen.
3. Click on the Edit button and then modify the time of day and/or activity in the Time and Activity Name fields.
4. Select Save.

To delete a time and activity

1. Select a day of the week. The routines for the selected day appears in the list box.
2. Select a time/activity from the list by highlighting it with the mouse.
3 Select Delete.

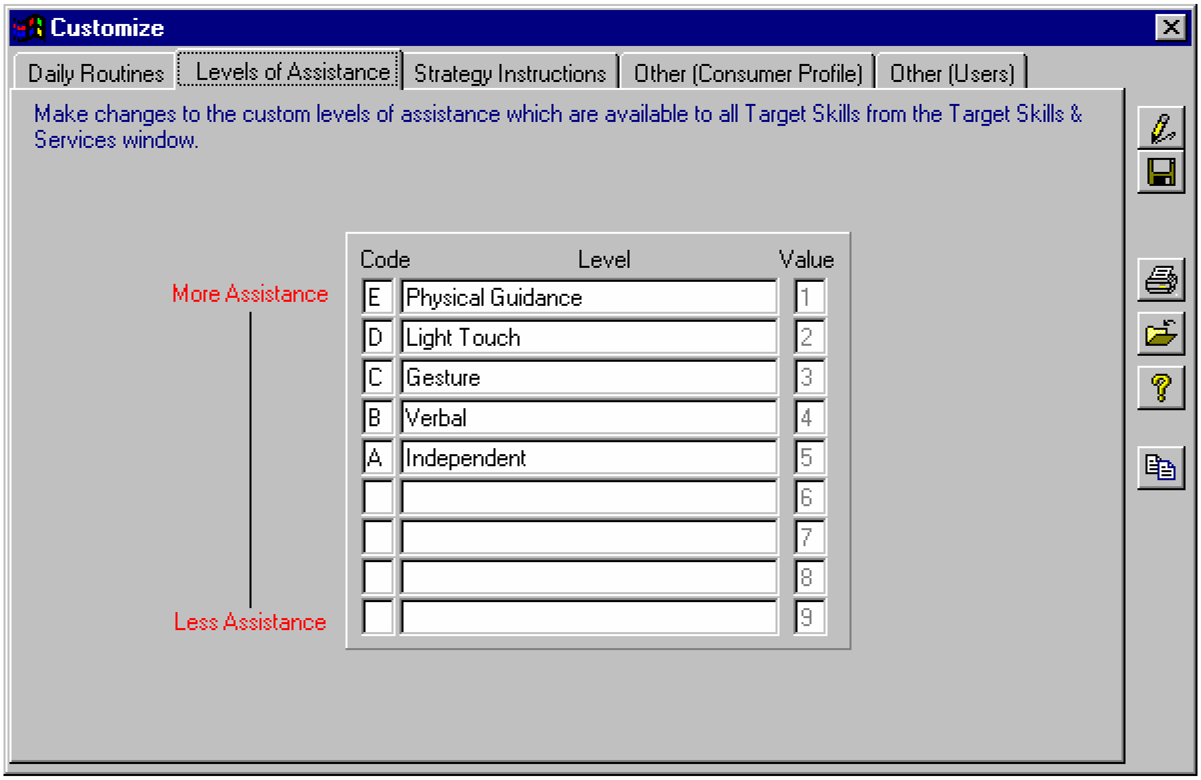
Master Levels of Assistance

Purpose

Levels of assistance are available for importation into Target Skills whenever the Skill/Service Wizard is used to assist in development of a teaching objective. These levels of assistance originate from Master Levels of Assistance. You may wish to modify these levels so the teaching method matches that used by your current teaching curriculum.

Getting There

To modify the default values of the master levels of assistance, select Tools | Administrative | Customize from the main menu. Select the Levels of Assistance tab on the Customize window.



To modify Levels of Assistance

- Tab to or select a Code or Level of Assistance.
- Click on the Edit button and then type in the new information.
- Save information by selecting the Save button.

Note

- You may repeatedly change the customized levels of assistance without affecting levels of assistance for existing Target Skills.
- Observe the following rules when designing a new scale:
  - Order the levels along a continuum from *most* assistance to *least* assistance. EC3 assigns the Values displayed in the right-hand column to the Codes so that more credit is given for less assistance.
  - Non-completion for any reason (e.g., refusal) is assigned a zero value.

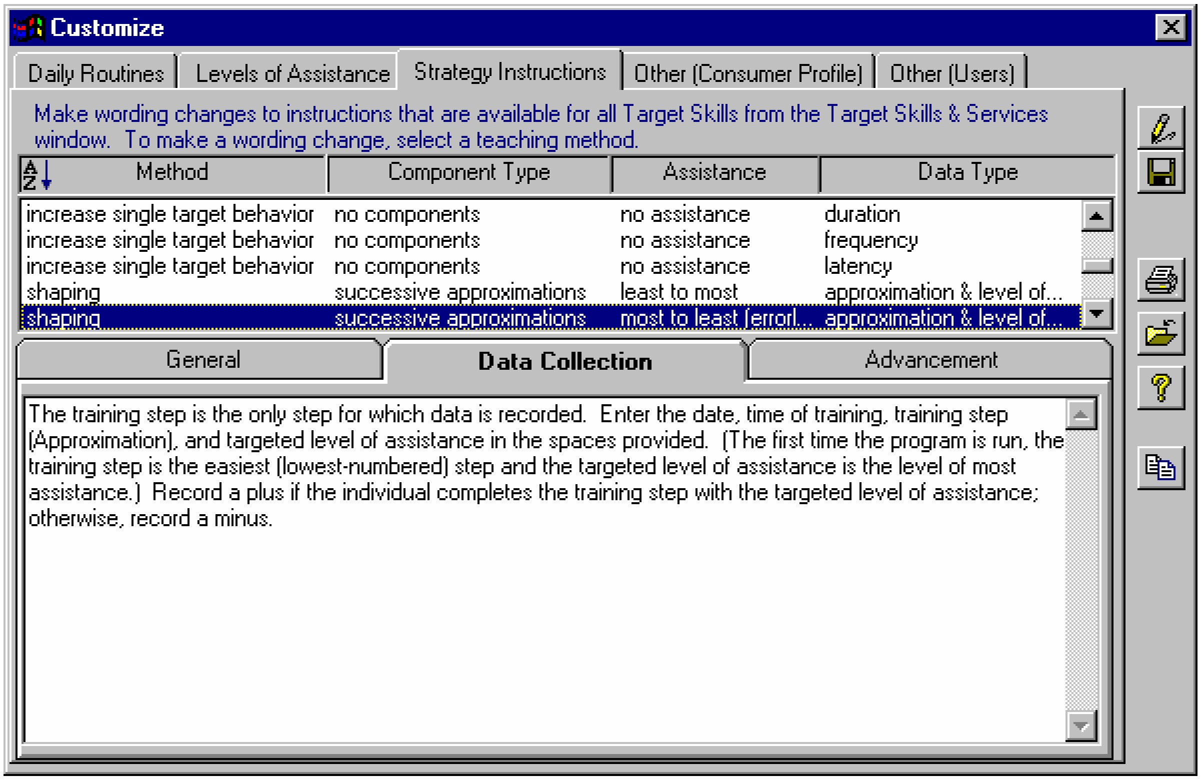
Master Strategy Instructions

Purpose

Teaching instructions for all commonly-used teaching methods are available for importation into Target Skills whenever the Skill/Service Wizard is used to assist in development of a teaching objective. These instructions originate from Master Teaching Instructions. You may wish to modify these instructions so the printed Strategy report more closely matches language used by your current teaching curriculum.

Getting There

Select Tools | Administrative | Customize from the main menu. Select the Strategy Instructions tab.



To modify Instructions

- Select a teaching method from the list. The corresponding General Instructions, Data Collection, and Advancement appear in the three sections at the bottom portion of the window. Click on the Edit button to begin editing.
- General Instructions and Data Collection instructions may be cautiously edited as long as some important restrictions are observed: Be careful *not* to modify any parts of the instructions crucial to how the teaching procedure is carried out. For example, you may not change reference to the teaching method from *total task* to *forward chaining* in the instructions. This is because Data Analysis & Review will still treat and evaluate data consistent with the choice of teaching method made in the Skill/Service Wizard. Other types of modifications to instructions that will have undesirable results include a change from levels of assistance to no levels of assistance or vice verse, a change in direction of assistance or a change in data type.
- Save information by selecting the Save button.

Other (Consumer Profile)

Purpose

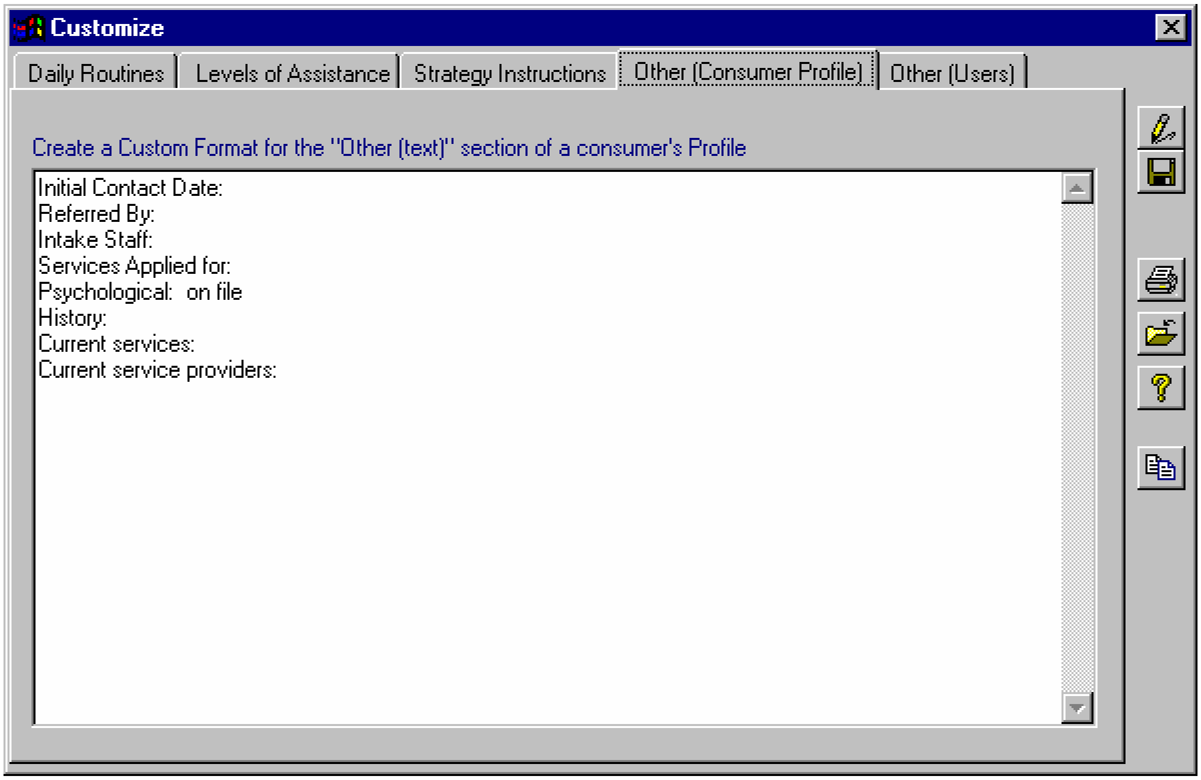
When creating Profile information for a consumer, EC3 offers you the option to copy a uniform text outline of your design to the Consumer Profile Other (text) as a basis from which to organize information that is not included in specific fields elsewhere.

Getting There

Select Tools | Administrative | Customize from the main menu. Then select the Other (Consumer Profile) tab.

Window Appearance

The window appears as a large blank text area until information is entered. There is a row of command buttons on the right.



Viewing and Editing

Use the Edit button to create or edit the desired information

Note

To utilize this feature from the Consumer Profile Other (text) section for a selected consumer, the Other section must be blank.

- Choose the edit button.
- Choose Edit | Custom Format from the Main Menu.

You may repeatedly change the customized Other information without affecting Other (text) for existing Consumer Profiles.

Other (Users)

Purpose

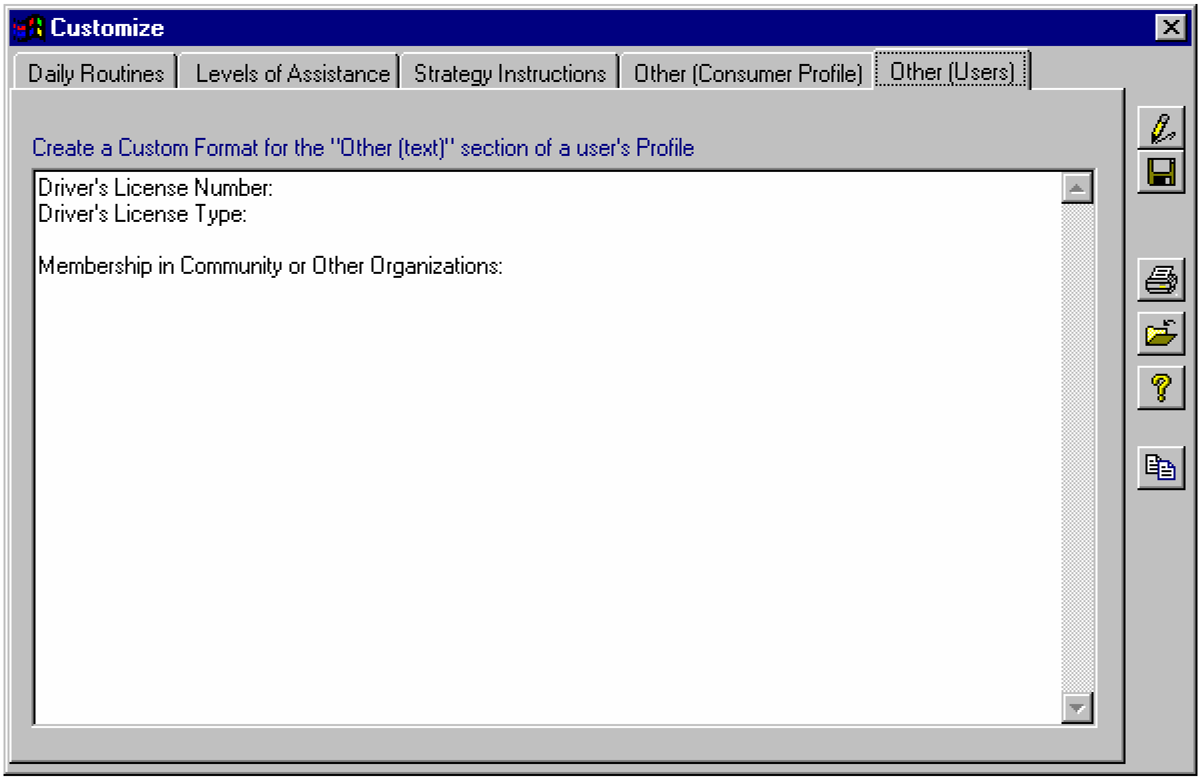
When creating Profile information for a user EC3. offers the option to copy a uniform text outline of your design to the User Profile Other (text), thereby establishing a format from which to organize information that is not included in specific fields elsewhere.

Getting There

Select Tools | Administrative | Customize from the main menu. Then select the Other (User Profile) tab.

Window Appearance

The window appears as a large blank text area until information is entered. There is a row of command buttons on the right.



Viewing and Editing
Select the Edit button to create or edit the desired information

Note
To utilize this feature from the User Profile Other (text) section for a selected user, the Other section must be blank.

- Choose the edit button.
- Choose Edit | Custom Format from the Main Menu.

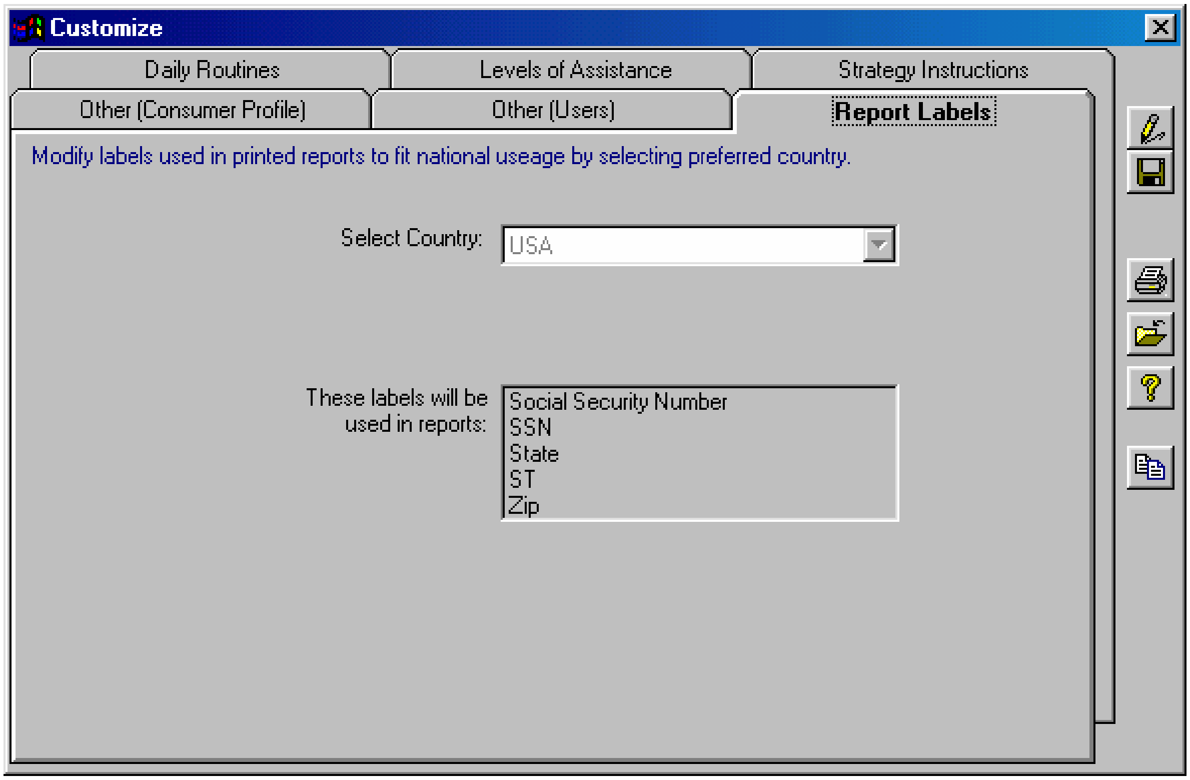
You may repeatedly change the customized Other information without affecting Other (text) for existing User Profiles.

Report Labels

Purpose
EC3 printed reports incorporate labels for entities that vary with national locale. An example would be geographical divisions such as "state" in the USA and "province" in Canada. The Report Labels option allows EC3 administrators to select the set of report labels that are appropriate for their locale.

Getting There
Select Tools | Administrative | Customize from the main menu. Then select the Report Labels tab.

To Modify Report Labels
Click the edit button on the toolbar to the right. Find the new country in the "Select Country" dropdown box. The set of report labels associated with that country will be displayed in the list box below. Click the save button before exiting. The new set of labels will now appear in EC3 generated printed reports.



Custom Incident Type

Purpose
The Custom Incident Type window allows you to enter frequently used incident types. These incident types are available to users completing Incident reports.

Getting There
Select Tools | Administrative | Custom Incident Type from the main menu.

Window Appearance
Incident types are displayed in a list box. A toolbar is located on the right side of the window. Data is edited below the list box

Viewing and Editing
Select an item from the list box. Use the buttons on the toolbar to add, edit, save and delete.

Note
You must have access to the Administrative menu to perform this task.

Place of Service Codes

Purpose
The Place of Service Codes window allows you to select service locations from a Medicare approved list. These place of service locations are available to users completing billing records in Agency Billing or from Notes or Target Skills and Services.

Getting There
Select Tools | Administrative | Place of Service Codes from the main menu.

Window Appearance
The EC3 POS List contains the place of service locations that are currently selected and available for use in creating billing records in your EC3 application. The Other Medicaid POS Codes list contains additional place of service locations that may be selected.

Viewing and Editing
To view a full description of an item in the EC3 POS List or the Other POS Codes list, click on it. The description will

appear in the box below. To add an item to the EC3 POS List, click on it and click the Add >> button. To delete an item from the EC3 POS List, click on the item and click the Remove << button. Click the Save List button when you have completed the changes.

Note
You must have access to the Administrative menu to perform this task.

Preferences

Purpose
From the Preferences window, you may set options for specific EC3 windows. Adjustments to the Preferences window apply to all users of the program. Once set, Preferences may be modified at any time.

Getting There
Select Tools | Administrative | Preferences from the main menu.

Window Appearance
There are options in Preferences to tailor EC3 by window.

Viewing and Editing
For each area of EC3, select the preferred option from each pair. Save information by selecting the OK button. The areas to which Preferences apply include

Consumer Notes
Plan Text and Cover
Data Entry
Review Notes
Reminders
Passwords
Prompt for Backup
Messaging

Note
- You must have access to the Administrative menu to perform this task.
- In general, options on the left side are more restrictive than options on the right.

Record Management

Purpose
The Record Management window allows you to archive, delete, and restore database records from/to other drives or diskettes or to hide or show database records. It also allows you to change an individual's 9-digit social security number (SSN) or other unique identifying number.

Getting There
Select Tools | Administrative | Record Management from the main menu.

Window Appearance
There is a list of the Record Management tasks you may perform. Below the list, a Description box displays an explanation of the highlighted task. There is a button labeled Run on the right.

Viewing and Editing
Select a task from the list and click Run. Depending on the task, you will be prompted for additional information.

Note
You must have access to the Administrative menu to perform this task.

Archive Records

Archive allows you to copy (archive) consumer information, user/staff information, and consumer plans from the EC3 database to individual data files on the hard drive or diskette. Once copied, you have the option to delete the information from the working database.

To Archive

1. Select an archive function from the list in the Record Management dialog box and Run. A list of consumers, plans or staff appears.

2. Select the item to archive, and select OK. The Archive As dialog box will appear.

Dialog box options

File Name	an eight character name for the data file; EC3 adds .PRS, .PLN or .CON extension for staff information, consumer plan or consumer information, respectively.
Directories	the directory to which the data file is to be saved.
Drives	the drive to which the data file is to be saved.
Save File As Type	Automatically saves the data file with the .PRS, .PLN or .CON filename extension.

3. After making the desired selections, confirm the operation by selecting OK.

4. When the copy operation is complete, you may choose to delete the record from the working database or keep the records in the working database.

Tip
It's a good idea to archive and delete consumers who are no longer served by the agency, staff who no longer work at the agency, plans that are no longer current. If you do not need to reduce the size of your database, but wish to reduce the number of items appearing in EC3 list boxes,an alternative choice would be to hide consumers or staff.

Note
Information that is archived and deleted may later be restored using the Restore option.

Delete Records

Archive allows you to copy (archive) consumer information, user/staff information, and consumer plans from the EC3 database to individual data files on the hard drive or diskette. Once copied, you have the option to delete the information from the working database.

To Delete

1. Select a delete function from the list in the Record Management dialog box and Run. A list of consumers, plans or users/staff appears.

2. Select the item to delete, and select OK.

3. Confirm the operation by selecting OK.

Tip
It's a good idea to archive and delete consumers who are no longer served by the agency, users who no longer work at the agency, plans that are no longer current.

Note
Information that is archived and deleted may later be restored using the Restore option.

Restore Records

EC3 allows you to restore archived consumer Plans and consumer and staff Information from storage back to the working database. Reasons for restoring data may include return of an individual to the agency or transfer of consumer records to your agency from another agency that uses EC3. Once an individual's data is restored, their name will display on Name Boxes in all relevant windows.

Restoring Consumer Information
When the Restore Consumer Information function is run, you recover the consumer Profile, Relationships, Education, Employment, Medications, Budgeting, Incidents, Consumer Forms, and Notes that were archived. You will have to recreate Service Assignments and consumer Daily Routines.

Restoring Consumer Plans
Consumer plans may be restored to recover the Planning Schedule, Plan Text, Quarterly Reviews, Target Skills, Target Services, Strategies, and raw data.

Restoring Staff Information
EC3 allows you to restore all staff data that was archived. Since Service Assignments are not archived they must be recreated.

To Restore

1. Select a restore function from the Record Management list.

2. Select Run. The corresponding Restore dialog box will appear.

3. Select the item to restore, and press the OK button. The Restore From dialog box will appear

4. Choose a data file from the list of files under File Name, or type the name of the document in the File Name box. (You can also open a document that is on another drive or in another directory by first switching to the other drive or directory.) (Note that the restore operation will *move* the data file, not copy it.)

Dialog box options

File Name	Choose the name of the data file you want from the list or type in the filename.
List Files Of Type	Choose the type of file you want listed in the File Name list (PRS, .PLN or .CON filename extension for staff information, consumer plan or consumer information, respectively).
Directories	Choose the directory containing the file you want.
Drives	Choose the drive containing the file you want.

5. EC3 lets you know when the operation is complete. Select the OK button to return to the Record Management window.

6. Select Done to return to the main menu.

Hide Records

Hide allows you to inactivate records for selected SSNs in the EC3 database. Hidden consumers or staff will not appear in dropdown boxes for any menu function other than Show. In addition, hidden staff (EC3 users) will be prevented from logging into EC3.

To Hide

1. From the Tools menu select Administrative > Record Management.

2. Select Consumer Information: Hide or Staff Information: Hide press Run.

3. A list of consumers or staff appears. Select the individual to hide, and press Hide. A dialog box will appear asking you to confirm your choice. Confirm the operation by selecting Yes.

4. EC3 will notify you when the operation is successfully completed.

Tip
Hiding records will reduce the number of records in dropdown boxes, making them easier to search, without removing records from the database.

Note
Hide does not alter, move or delete any information. Hide only adds a flag to the record which causes the search engine to skip the record. Once the Hide flag is added to a record, EC3 will skip over all records related to the "hidden" individual, including forms.

Records that have been "hidden" can be reactivated at any time by using the Show option. The show option removes the Hide flag.

Show Records

EC3 allows you to reactivate consumer Plans and consumer and staff Information that have been hidden in the database. Once an individual's data is reactivated their name will display on Name Boxes in all windows.

To Show

1. From the Tools menu select Adminstrative | Record Management.

2. Select a show function (Consumer Information: Show or Staff Information: Show) from the Record Management list and press Run.

2. EC3 will display a list of individuals whose data has been previously hidden. From the Name list, select the individual whose data you wish to show. Press Show. A dialog box will appear asking you to affirm your choice. To continue select Yes.

3. EC3 lets you know when the operation is complete.

Tip
Reasons for reactivating data may include return of an individual to the agency, transfer of consumer records to your agency from another agency that uses EC3, or for completion of billing or other office procedures.

Hide or Show an Incident Report

At times, it may become necessary to restrict access to an Incident Report by removing it from view in EC3. EC3 allows a user with administrative privileges to hide incident reports. An administrative user may make the hidden report visible at any time by using the Show option.

To Hide the Incident Report

1. Open the incident report in EC3 and note the Incident ID number. (Keep a record of the ID number, which will be needed in case you wish to Show the report later.)
2. Go to Tools | Administrative | Record Management.
3. Select Incident Report: Hide and click Run.
4. Enter the Incident ID number in the dialog box and click OK.
5. Verify that you wish to hide the selected report.

To Show the Incident Report

1. Follow steps 1 and 2 above.
2. Select Incident Report: Show and click Run.
3. You will be shown a list of "hidden" incident report ID numbers. Select the report number and click Show.
4. Verify that you wish to show the selected report.

System Use

Purpose
The Current Users window displays the names of users who are currently signed on to EC3. You may delete or sign off individuals who are currently using the program or users who experienced an abnormal exit from EC3 and encountered the "already logged on" message while attempting to re-sign-on to the program.

Getting There
Select Tools | Administrative | System Use from the main menu OR, from the Sign On window, with the cursor in the last name field, press the F5 key.

Window Appearance
Current users are displayed in a list box. At the bottom of the window is the Sign User Off System button.
Signing Off
Select the user's name from the *Current Users* list. Select the Sign User Off System button. If you have entered from the Sign On screen, you will be prompted to enter the user's password.

Note
EC3 constantly checks the table containing the current user list. If a user has been signed off but is still using EC3, EC3 will send that user a message and then end the program.

User Profile Window

Purpose
The User Profile window displays information about EC3 users. Usually EC3 users are members of your agency's staff and the words "user" and "staff" are used interchangeably.

Getting There
Select Tools | Administrative | User Profile from the main menu.

Window Appearance
There are six tabs to help organize user-related information. On the main menu there is a dropdown list with user names and toolbar buttons for editing.

Tabs and Buttons
General [TAB] general information about a user.
Security [TAB] areas of EC3 that a user may access. For each area, indicate an access level:

None User may not access the area

Read	User may only view records in the selected area
Full	User may view, change & add records in the selected area

See also Maintaining a Secure System

You may copy security settings from another user/staff by using the Copy Security from... button.

Confidentiality [TAB] assure confidentiality of records by choosing whether to restrict a user's access to only those consumers to whom she/he has been assigned via Service Assignments.
Certification [TAB] information pertaining to professional certification and inservice requirements.
Emergency [TAB] emergency contact information.
Other (text) [TAB] Other information that is important to record about users. You may create a customized format for your agency using a uniform text outline to organize the information in the Customize window and then import it into this section.
Camera Button permits you to import a bitmap (.bmp) image of the user into the frame above.

Viewing and Editing
Select a name from the dropdown list of the main menu toolbar. Use the buttons on the main menu toolbar to edit and save information.

Note
New Users are added via the File | New User command. Users are deleted via the Tools | Administrative | Record Management command using the Staff Information: Delete function.

Tools: User Profile, Copy Security from... The copy security function automates copying of the security profile of one user to another.

This function is accessed as follows: Select Tools | Administration | User Profile; select a user; click the edit button on the button bar; click on "copy security from ..."

Adding a User's Photo. A graphic file (for example, a scanned photo) saved as a bitmap (.bmp) file may be inserted into a user's profile.

To insert a photo or change to a new photo
With the User Profile window open and the user selected:
- Select the Edit button.
- From the General subsection select the button that looks like a camera. The New User Photo dialog box will appear.
- Under File Name, type or select the name of the photo you want to insert. If you don't see the bitmap file you want, select a new drive or directory.
- Choose the OK button.

To remove a photo
With the User Profile window open and the consumer selected:
- Select the Edit button.
- Double-click on the photo.

Note
For best results size the photo no wider than 250 and no taller than 300 pixels.

Service Assignments

Purpose
The Service Assignments window allows you to relate users and consumers to define each consumer's individualized team of service providers. Alternatively, Service Assignments is used to create the set of consumers for whom each user has access to information. EC3 allows you, via User Profile, to restrict a User's access to only those consumers to whom s/he is assigned in Service Assignments. In addition, Service Assignments controls which staff/user names will appear in the Responsible Person selection box in Target Skills and Target Services.

Getting There

Select Tools | Service Assignments from the main menu.

Window Appearance
At the top is a Name box, options to relate consumers to users or users to consumers, and two list boxes. The left is a list of staff (or consumers) The right is a list of staff (or consumers) assigned. At the far right is a toolbar for editing.

Viewing and Editing
Select an option to make service assignments by consumer or user/staff member. Select a name from the dropdown list of names at the top of the window. Select the Edit button on the toolbar.
Transfer names from the unassigned list to the assigned list or vice versa. (Multiple names be transferred by holding down the CTRL key while selecting names with the mouse.) Alternatively, you may copy service assignments from another user whose service assignments are a close match to the current individual, then modify further if needed. Save changes by selecting the Save button.

Notes
Only staff or users who have been added to EC3 via New User/Staff are available for assignment to consumers.

Copy Service Assignments

Purpose
To copy service assignments between consumers and users.

Window Appearance
A drop down list with names of consumers or users.

To Copy Service Assignments
Select a name from the drop down list. Select the OK button.

Planning Schedule

Purpose
From the Planning Schedule window you can schedule and initiate a plan for a consumer.

Getting There
Select Tools | Planning Schedule from the main menu.

Window Appearance
In the upper portion of the window is a list box showing scheduled plans. In the lower portion of the window are details for a selected item in the list. There are two tabs on the window to help you schedule the plan.

Tabs and Buttons
General [TAB] general information about the plan.
Meeting [TAB] information relevant to the planning meeting.

Initiating a new plan

1. Select the New button.
2. Select a consumer's name from the box.
3. Enter information into the fields on each tab:

   Choose whether to import the Plan Text from the previous planning period.

4. Optional: Select the Notify button to indicate all staff who are to receive a notice about the planning meeting.
5. Save information by selecting the OK button.

Modifying a scheduled plan
After a plan has been scheduled, you may change information about the plan.

1. From the Planning Schedule window select the consumer's name and plan.
2. Select the Edit button.
3. Modify any of the fields in the dialog box.
4. Optional: Select the Notify button to send a notice of the revisions to selected EC3 users.
5. Select the OK button to save the information.

Design

Agency Form Designer

Purpose
From the Agency Form Designer window, a form or Plan Template can be created, viewed or modified. Each Form may be accessed in the Consumer Forms section of EC3 to create an individualized document. Each Plan Template is accessed in Planning Schedule section of EC3 to help you to begin to create an individualized planning document.

Getting There
Select Tools | Design | Agency Forms from the main menu. Select a form name from the list on the main menu bar.

Window Appearance
Shows the first page of the selected form or an icon for your default word processor.

Creating a New Form or Plan Template
To add a new agency form: Select the New button from the main menu toolbar and follow the prompts. To view or edit an agency form, first select a form name from the drop-down list on the main menu. Use the buttons on the main menu toolbar to perform edit and delete operations.

Note
When an agency form is added or edited, the document is automatically given a file name. When saving the document, always use the Agency Form file name supplied by the EC3, so the document may be retrieved and backed up properly.

New Agency Form Designer

Purpose
From within Agency Form Designer, the New Agency Form window allows the user to create a new agency document.

Getting There
Select Tools | Design | Agency Form, then select the New button in the tool bar at the top of the main menu.

Window Appearance
A place to enter the name of the form and to indicate whether it is a plan template.

Viewing and Editing
Enter a form name; indicate by checking the box if this is a plan template. Select the OK button. EC3 will open a blank document in your default word processor.

Cover Page Designer

Purpose
The Cover Page Designer window allows you to customize the cover page of a plan with information from other sections of EC3.

Getting There
Select Tools | Design | Cover Pages from the main menu.

Window Appearance
On the left side of the window is a list of information not currently included on the cover page. On the right side there is a list of items which will be included.

Editing the design of the Cover Page
You can use the Add and Remove buttons to add/remove information. Select the Save button to save your changes.

Note
- Changes made in Cover Page Designer do not affect Cover Pages for existing consumer plans.
- You may add multiple page and/or line breaks.
- Changes in the Cover Page may be viewed upon the development of the next-scheduled consumer's plan.
- An unwanted existing Cover Page for a consumer may be replaced by a newly-designed Cover Page by deleting all information from the old Cover Page, saving the blank Cover Page, and then re-selecting the now-blank Cover Page.

Medication Library

Purpose
The Medication Library window allows you to enter medications and related information about each medication. This

information is used to autofill fields in the Consumer Medications window.

Getting There
Select Tools | Design | Medication Library from the main menu.

Window Appearance
In the upper portion of the window is a list box with medication names. In the lower portion of the window are details for a selected item in the list. To the right is a toolbar for editing.

Tabs and Buttons

General [TAB]	Information about the medication, generic name, what it is prescribed for.
General Information [TAB]	Lengthier information about the medication.
Side Effects [TAB]	A listing of the medication's adverse effects.
Food/Drug Interactions [TAB]	Any documented adverse reactions as a result of the medication's combination with certain other drugs or with foods.

Viewing and Editing
Select an item from the list box. Use the buttons on the toolbar to add, edit, save and delete.

Note Subject Library

Purpose
The Note Subject Library window allows the user to enter frequently used Note Subjects. These Note Subjects are available to users completing Consumer Notes.

Getting There
Select Tools | Design | Note Subject Library from the main menu.

Window Appearance
Note subjects are displayed in a list box. A toolbar is located on the rights side of the window. Data is edited below the list box

Viewing and Editing
Select an item from the list box. Use the buttons on the toolbar to add, edit, save and delete.

Note
You must have access to the Design menu to perform this task.

Skills & Services Library

Purpose
From the Skills & Services Library window you can add to and change skills and services used by the Skill/Service Wizard to create new Target Skills and Services.

Getting There
Select Tools | Design | Skills & Services Library from the main menu.

Window Appearance
In the upper portion of the window is a list box with skills/services for a selected category. In the lower portion of the window are details for a selected item in the list. There are three tabs on the Skill & Services Library window. To the right there is a toolbar with buttons for editing.

Tabs and Buttons

General [TAB]	general information about this specific service/skill.
Components [TAB]	details about the selected skill/service.
Teaching Information [TAB]	target behavior, materials needed, and condition under which the behavior is expected to occur.

Viewing and Editing
Select an item from the list and use the toolbar buttons perform add, edit and delete operations.

Note
Additions and changes made to the Skill & Services Library are reflected in the Skill/Service Wizard.

Creating User-Defined Queries

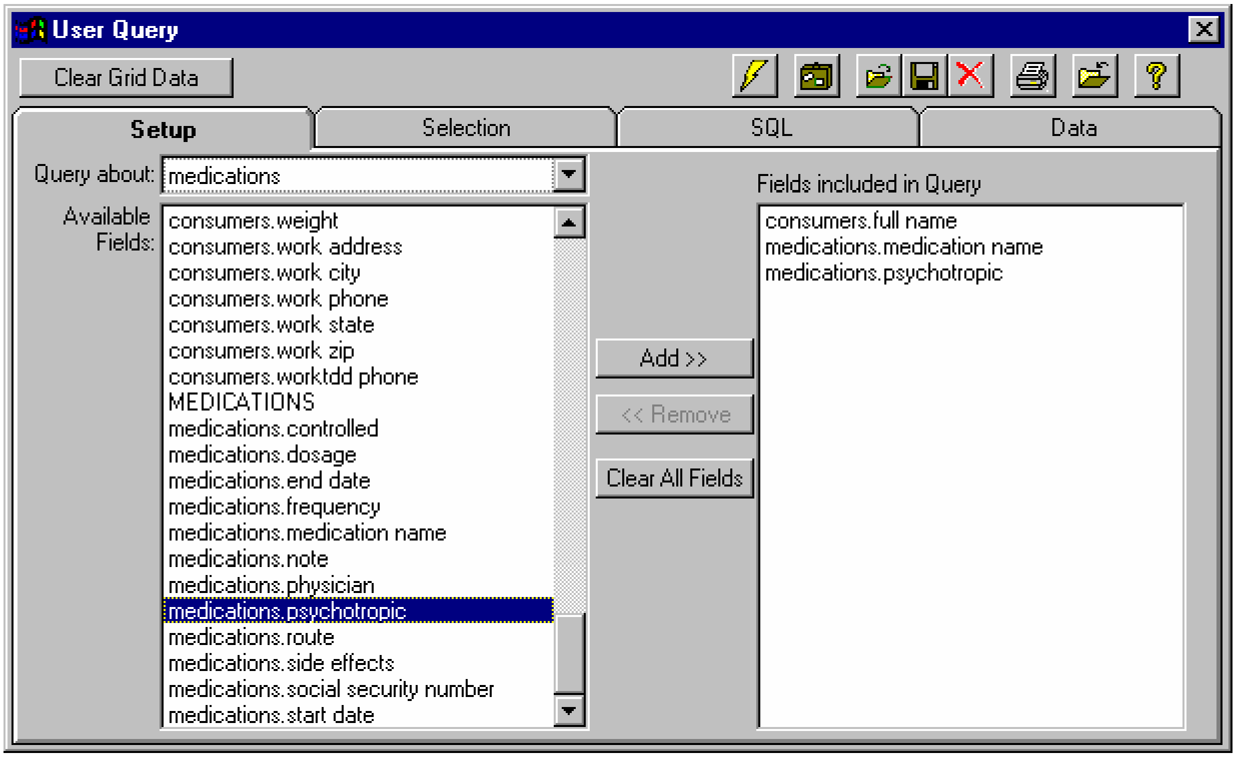
Purpose
From the User Query window, you can create queries that organize information from the EC3 database. Some queries yield summary statistics.

Getting There

Select Tools | Design | User Query from the main menu.

Window Appearance

In the upper right portion of the window is a tool bar. Below the tool bar are four tabs that organize the interface for creating a query.



Tabs and Buttons

Setup [TAB]	select the area of the database to query and the fields to include in that query. EC3's tables appear in all uppercase letters. Double-clicking on the table name expands the list to reveal all of the field names in the table listed in alphabetical order. Double-clicking again contracts the list.
Selection [TAB]	set up selection criteria for selecting specific records.
SQL [TAB]	EC3 created SQL (structured query language) statement used to get the data for your report. You can also edit it or write your own SQL statement.
Results [TAB]	the results of an executed query are displayed on the tab in row x column format.
Clear All Fields [BUTTON]	removes all fields from the "Fields included in Query" list.
Toolbar	allows you to execute a query, export data created with the query, save the query for future use, open an existing (saved) query and close the User Query window.

Creating a query

- Pick a topic from the "Query about:" list. The fields associated with that topic are displayed in the "Available Fields:" list box below.
- Select and unselect fields to include in the query using the Add and Remove buttons.
- Select the Query Results button  to display the query.
- Filter the data via the Selection tab.
- Power Users ONLY: Once created, you may refine the query by modifying the underlying SQL which does the actual data selection.
- Export data to a file using the Export (suitcase) button.

Printing

You may export results to a word processor, Microsoft Access (TM) or Excel (TM) and print from there.

Inservice Training

Purpose
The Inservice Training window allows you to keep track of your staff training by allowing you to enter information about each inservice training event and to individualize participant records for each event.

Getting There
Select Tools | Inservice Training from the main menu.

Window Appearance
There are two tabs on the window to help keep track of staff training information.

Adding to or editing Inservices entries
To add or modify an inservice entry:

1. Select the Inservices option. Entries to date appear in alphabetical order by Title in the list.
2. Select the New button to add a new entry to the list or select an entry from the list to view or modify existing information.
3. Enter information into the fields in the window.
4. Save information by selecting the Save button.
5. At the bottom of the window is the Participants button to indicate all staff who attended the inservice training event.

To delete an Inservices entry

1. Select an entry from the list.
2. Only Inservices entries with no associated participants may be deleted. Use the Participants button to remove names of staff who were listed as attending the inservice training event.
3. Select the Delete button.

Viewing or editing a Staff Record

1. From Tools | Inservice Training select the Staff Records option . (Information about inservice training events must first be entered via Inservices).
2. Select a staff member's name from the dropdown list of names at the top of the tab. EC3 responds by presenting all current entries, in chronological order, for that employee in a list.
3. To view or edit the record, select an entry from the list. You may edit the Completion Date, Number of units earned, Type of units earned, and Note fields, Changes to these fields will only affect the selected staff member's record.
4. Save modified information by selecting the Save button.

Tip

For inservice training events that recur on a regular basis you may keep adding new participants to the original event via the Participants button in the Inservices section.

Participants. Select the Participants button when adding or editing a record from the Inservices tab on the Inservice Training window.

To indicate attendance using Participants

1. With an entry selected in the inservices window select the Edit button. (Note: A newly-added entry must first be saved, reselected, and Edit selected to add Participants.)
2. Select the Participants button. A dialog box with two lists of employee names will appear. In the list to the left are all of the Non participating employees. In the list to the right are all of the Participating employees to date. (Initially, the Participant list will be empty.)
3. Indicate attendance by selecting a name from the Non participant list and then pressing the ENTER key or selecting the Add button. Remove a staff member from the Participant list by selecting a name from the list and then pressing the ENTER key or selecting the Remove button. Repeat until all staff members attending the class have been indicated.
4. Save the new participant list by selecting the OK button; the CANCEL button discards changes to the participant

list.

Course name, instructor name, completion date, credits, and note are saved with each employee's inservice record. The completion date, credits, and note may be individualized for an employee by selecting the Staff Records option.

Messages

Purpose
The Messages window allows you to send or view message to/from other EC3 users.

Getting There
Select Tools | Messages from the main menu.

Window Appearance
There are two tabs on the window for the current user to view message received and sent.

Tabs and Buttons

Sent [TAB]	messages sent by you to other users.
Received [TAB]	message sent by other users to you.

Sending a Message

1. Select Sent option from the Messages window
2. Select the New button. EC3 responds by automatically filling in today's date, the current time and your name into the corresponding fields. The message will be permanently tagged with this information and may not be changed.
3. Enter the subject of the message into the corresponding field.
4. Enter your note into the Text field.
5. Select the Send Message button to indicate all users who are to receive a copy of the message.
6. Select one or more recipients from the Distribution List.
7. Save information and return to the Send Messages window by selecting the Send button.

Viewing Messages Sent

1. Messages sent to date appear in reverse chronological order in a list.
2. Select an entry from the list to view the message.

Deleting an old sent message
Only the recipient of a message may delete messages.

1. Select an entry from the list.
2. Select the Delete button.

Viewing Messages Received

1. Select Received option from the messages window
2. Messages received to date appear in reverse chronological order in a list.
3. Select an entry from the list to view the message.

Deleting an old received message

1. Select an entry from the list.
2. Select the Delete button.

Resource Directory

Purpose
From the Resource Directory window you can keep track of organizations in your community and the services they provide. Ultimately, this information is used as a community resource directory to assist consumers to access community services. The information entered is used in many other areas of EC3 (e.g., billing, education, employment, service eligibility, service participation, medications, profile).

Getting There

Select Tools | Resource Directory from the main menu.

You may also get to the Resource Directory window from the Resource Directory button from the Employment, Education, Organization Billing, and other related windows.

Window Appearance

In the upper portion of the window is a list of resource organizations. In the lower portion of the window are details for a selected item in the list. There are five tabs on the window to help organize resources information. To the right there is a toolbar with buttons for editing.

Tabs and Buttons

General [TAB]

Billing Information [TAB]

Specific Services [TAB] the services this resource provides

Notes [TAB]

Type [TAB] e.g., service provision organization, school, funding source, pharmacy

Viewing and Editing

Select an item from the list and use the toolbar buttons to perform add, edit and delete operations.

Notes

- When editing an existing item you may also enter specific services.
- Specific Services may only be added once a new resource has been saved.

Specific Services

Purpose

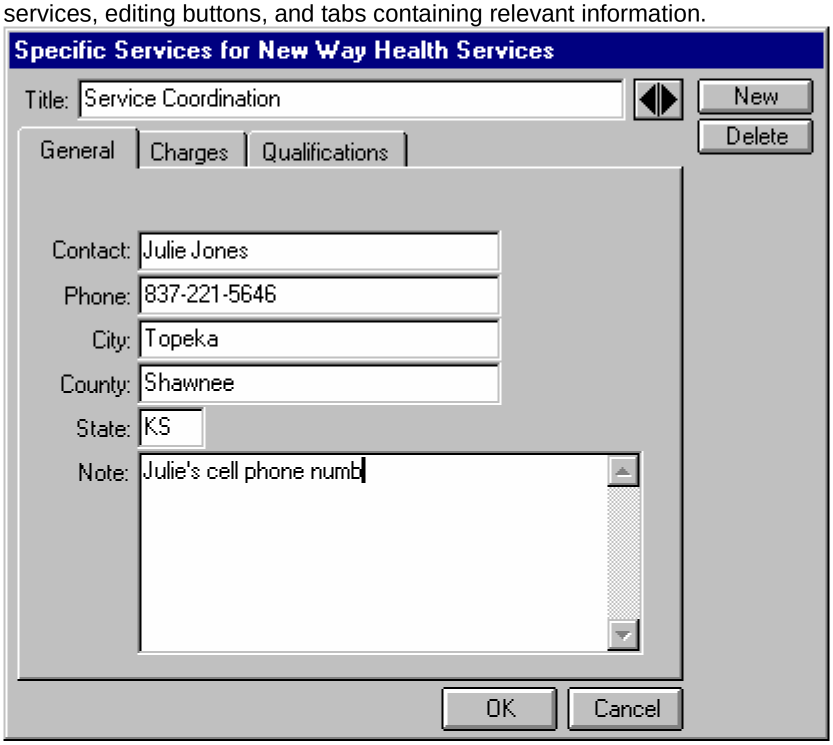
To maintain details of specific services available from organizations included in the Resource Directory, organized by provider.

Getting There

Specific Services for an organization (resource) are listed on the Specific Services tab in the Resources window. Below the list are buttons to view, and to add/edit Specific Services.

Window Appearance

At the top of the window is a place for the title of the service, left and right arrows to move, alphabetically, between services, editing buttons, and tabs containing relevant information.



Tabs and Buttons

General [TAB]	general service information
Changes [TAB]	information about charges for the service
Qualifications [TAB]	information about qualifications to receive the service
<> [BUTTON]	move to previous or next service in the list
New [BUTTON]	adds a new service
Delete [BUTTON]	deletes the current service

Viewing and Editing
Use the arrows to move to the service you would like to view or edit. Use the New button to add a service. Select OK to save changes.

Agency Billing

Purpose
From the Agency Billing window you can view and edit billing information for the services provided for all or a particular consumer within a certain period of time. You may also create new billings to organizations listed in the Resource Directory whose Type is indicated as funding agency (e.g., Private Insurer, and state, federal or other funding source).

Getting There
- Select Tools | Agency Billing from the main menu
- Select consumer name, bill to, and date range from the Find dialog box, and push Find

Window Appearance
In the upper portion of the window is a list box with information for each billing. In the lower portion of the window are details for a selected item in the list.

Viewing and Editing
Select an item from the list and use the buttons on the toolbar to the right to perform add, edit and delete operations.

Printing Reports
You may print the Billing Information Organized by Consumer and Funding Source report directly from the form. Select (highlight inthe list box) the billing item or items you wish to print and press the print icon on the toolbar to the right. All the other billing reports remain available by going to PrintIt!.

Creating Billing. You may record billing information from:

Consumer Notes
Target Skills and Services
Agency Billing

To enter billings for a consumer, there must be an organization in the Resource Directory that funds services.

Change Password

Purpose
From the Change Password window you can change your own password, but not the passwords of other users. Once you have changed your password, you must use your new password to sign on.

Getting There
Select Tools | Change Password from the main menu.

Window Appearance
There is room to enter your current password and, for safety's sake, two places to enter your new password.

Changing your password
Complete the three fields and select OK.

Note
Changing the passwords of other users may only be done via Tools | Administration | User Profile.

Internet Gateway

Purpose
The Internet Gateway command starts the user's default web browser or the EC3 web browser so that s/he can take

advantage of a variety of information organized for the user at the Monaco & Associates' web site.

Getting There

- Select Tools | Internet Gateway from the main menu

Window Appearance

The user's default browser will be initiated. If s/he is not connected to an Internet Service Provider, the web browser will launch the appropriate the dial-up connection.

Note

To take advantage of this feature, the user must have a modem and an ISP (Internet Service Provider).

Step by Step Instructions

Creating a Target Service

Purpose
From the Target Skills & Services window, you may create supports to be provided to assist the consumer to achieve certain goals or outcomes.

Getting There
Select Consumers | Planning | Target Skills & Services from the main menu.

Window Appearance
In the upper portion of the window is a list box of skills/services for a selected consumer. In the lower portion of the window are details for a selected item in the list. There are 10 tabs on the Target Skills/Services window to help organize information.

Viewing,Creating, Editing, Scheduling/Unscheduling a Target Service

To create a new Target Service:
Select the New button.
- Select the Skill/Service Wizard option to use the EC3 Skill/Service Wizard to help you create the Target Service; otherwise, select I'll do it myself, thanks! or select Import.
- Fill in all incomplete fields in each subsection. Verify information that was filled in automatically if the Skill/Service Wizard was used.
- Select Save.

Upon starting a new Target Service the Import option allows you to carry over a Target Service from another plan for the same or for a different consumer. The Schedule command (Tools | Schedule Target Skill/Service) allows you to integrate Target Services into the consumer's Daily Routines.

To modify Target Service entries:
Select an entry from the list. Details appear in the fields below the list.
- Click on the Edit button and then modify information in the fields. Target Services for which there has been data entered through Data Entry will allow only certain fields to be modified (see above) and others will be unmodifiable, as indicated by their light gray appearance.
- Save information by selecting the Save button.

To schedule Target Service entries:
Target Services may be represented as part of a consumer's Daily Routines.
- Select the entry in the list box
- Select the Edit button
- Select the Schedule button on the Start Up tab
- Select Tools|Schedule Target Skill/Service

To delete a Target Service:
You may delete Target Services that have no associated data. Target Services for which data has been entered must first have the data deleted. EC3 will automatically remove the Target Service from the consumer's Daily Routines.
- Select a Target Service from the list.
- Select the Delete button.

Creating a Target Skill

Purpose
From the Target Skills & Services window, you may create supports to be provided to assist the consumer to achieve certain goals or outcomes.

Getting There

Select Planning | Target Skills & Services from the main menu.

Window Appearance

In the upper portion of the window is a list box of skills/services for a selected consumer. In the lower portion of the window are details for a selected item in the list. There are 10 tabs on the Target Skills/Services window to help organize information.

Viewing, Creating, Editing, Scheduling/Unscheduling a Target Skill

To create a new Target Skill:

Select the New button.

- Select the Skill/Service Wizard option to use the EC3 Skill/Service Wizard to help you create the Target Skill; otherwise, select I'll do it myself, thanks! or select Import.
- Fill in all incomplete fields in each subsection. Verify information that was filled in automatically if the Skill/Service Wizard was used.
- Select Save.

Upon starting a new Target Skill the Import option allows you to carry over a Target Skill from another plan for the same or for a different consumer. The Schedule command (Tools | Schedule Target Skill/Service) allows you to integrate Target Skills into the consumer's Daily Routines.

To modify Target Skill entries:

Select an entry from the list. Details appear in the fields below the list.

- Click on the Edit button and then modify information in the fields. Target Skills for which there has been data entered through Data Entry will allow only certain fields to be modified (see above) and others will be unmodifiable, as indicated by their light gray appearance.
- Save information by selecting the Save button.

To schedule Target Skill entries:

Target Skills may be represented as part of a consumer's Daily Routines.

- Select the entry in the list box
- Select the Edit button
- Select the Schedule button on the Start Up tab
- Select Tools | Schedule Target Skill/Service

To delete a Target Skill:

You may delete Target Skills that have no associated data. Target Skills for which data has been entered must first have the data deleted. EC3 will automatically remove the Target Skill from the consumer's Daily Routines.

- Select a Target Skill from the list.
- Select the Delete button.

Skills & Services Wizard

Purpose

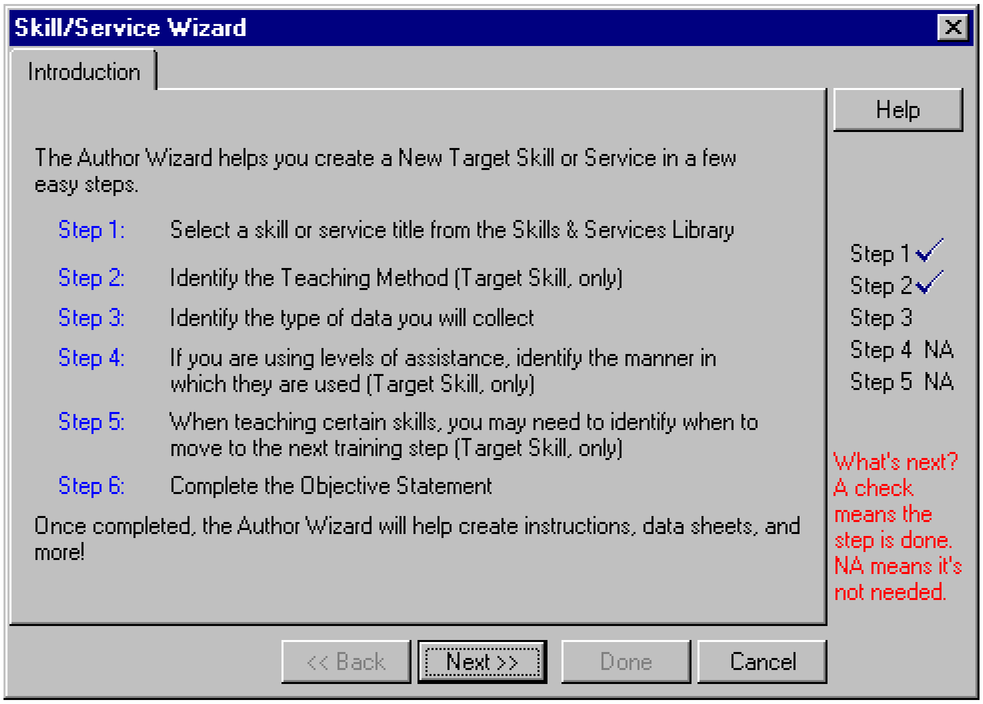
From the Target Skill and Services form you can access the Skill/Service Wizard and EC3's built-in expertise to assist in creating a logical and measurable teaching or service objective and associated implementation strategy.

Getting There

- Select Consumers | Planning | Target Skills & Services.
- Pick a consumer & Plan Date from the selection box on the main menu
- Select New
- Select the Skill/Service Wizard button.

Window Appearance

There are six steps to creating a new skill or service.



Tabs and Buttons

Step 1 select a skill or service title from the library
Step 2 for a target skill, select the method to teach the skill
Step 3 select the type of data to be recorded
Step 4 if you chose to use levels of assistance to teach a skill, then select direction of assistance
Step 5 set an advancement criteria (Target Skill, only)
Step 6 Complete the Objective Statement

Step 6 assists you to write the objective statement for the Target Skill or Service. Fill in all blanks of the criterion portion. You may need to readjust your selections to create the desired end result that clearly identifies the point at which the criterion for completion is met (and when to stop training) based on summarized training data.

Notes

Upon returning to Target Skills & Services you may individualize materials, reinforcers, components, levels of assistance, starting instruction, instructions for carrying out the training and instructions for data collection to meet the needs of the consumer. When a series of objectives is created, the Objective Statement may require some editing to correct grammar, capitalization, and punctuation.

Data Entry (Target Skills & Services Window)

Purpose

To enter data corresponding to a selected target skill or service in the Target Skills & Services window. Once entered, data may be summarized from the Data Analysis window or billed from the Billing Information window.

Getting There

From the Target Skills & Services window, select an item from the list and then select the New Data button (next to the list of skills and services) or the Edit Data button (on the Data Entry tab, below the data entry list).

Window Appearance

The window is designed like a grid with rows and columns for entering information.

New Data

If you select the New Data button, the New Data Setup dialog box appears. Use this to preset the number of rows of data you plan to enter, the date the data was collected, and so forth.

Entering Data into the Grid

Enter information into the grid. Use the Up, Down, Left and Right Arrows to move around in the rows and columns.

Use the shortcut buttons as needed to save time and edit the data:

Fill Down	Copies the information in the first highlighted cell of the column to all cells in the column directly beneath it.
Fill Series	Fills the highlighted cells of the column with the value of the first cell, plus 1, for each successive cell.
Copy Row	Copies the information in all cells of a highlighted row to the row immediately beneath it.
Insert Row	Adds a blank row.
Delete Row	Deletes the highlighted row.
Clear Row	Clears all cells in the row of data.
Clear Column	Clears all cells in the column of data.
Clear All	Clears all cells of data.
Note:	Use the Properties button to view details about the Target Skill/Service that will help decide when the criterion for completion is met for the objective.
Note:	When entering numeric data (frequencies, durations, latencies, scores) only whole integers are allowed.

Save by selecting the Save button.

Changing Data

Once saved, data may be viewed in the list on the bottom tab of the Target Skills and Services window.

To change an entry on the Target Skills and Services window:

1. Highlight one or more entries from the list.
2. Select the Edit Selected Data button.
3. Modify the data.
4. Select Save Data.

To Delete Data (from the Target Skills and Services Window)

Data may be deleted at any time, depending on selections made in Preferences.

1. Highlight one or more entries from the list at the bottom of the window by clicking on them with the left mouse button.
2. Select the Delete Selected Data button.

Data Analysis (Target Skills & Services Window)

Purpose

From the Data Analysis window you can review data in table format or graph format.

Getting There

You can get here two ways:
Select Planning | Target Skills & Services from the main menu. Pick a skill/service from the list on the Target Skills & Services window. Go to the Data Entry section and push the Analysis button. Alternatively, select the New Review Note button and then, from the Review Note window, select the Create Graph button. Either way the Data Analysis window appears. You can organize and summarize data for the Target Skills and Services of a consumer's plan entered via Data Entry.

Window Appearance

There are three tabs on the window to help set up data analysis for a target skill/service.

Tabs and Window Areas

Setup [TAB]	select Summary Period, Group by, Summary Statistics, and graph features. The summary statistic options change depending upon the type of data being collected.
Table View [TAB]	selected data and statistic(s) in a table format.
Graph View [TAB]	selected data and statistic(s) arranged in graph format.

Setting up data analysis & review

- Select summary period and group type
- Choose summary statistics you want to show
- Select graph features

View Graph: Use the View Graph button from the Data Analysis window to display the graph of data for a selected time period.

To View Graph

- Set up the type of graph desired via options provided on the Setup tab.
- Select the View Graph tab.

View Table: Use the View Table button from the Data Analysis window to display the table of data for a selected time period.

To View Table

Set up the type of table desired via the Analysis Setup button and then select View Table.

Review Note (Target Skills & Services Window)

Select the New Review Note button on the Target Skills & Services window to write a review note for a selected Target Skill or Target Service.

To view or add a Review Note

1. Select the New Review Note button. The Review Notes window will appear in the upper half of the window.
2. [Optional] Select the Create Graph button to set up a graph to go with the review note. The Data Analysis screen then allows you to set up beginning and ending dates for the summary period, the grouping factor (days, weeks, etc.), the statistics, and graph features.
3. [Optional] Select the Paste Graph to Review Note button  to attach the graph to the note and return to the Review Note window.
4. Proceed to write the note and edit the date fields if allowed to do so in Preferences.
5. Save information by selecting the OK button.

Each new note is automatically tagged with the date, time, and the author's name. Notes may be viewed or edited from the Review Notes tab of Target Skills & Services, depending on selections made in Preferences.

Schedule an Objective (Target Skills & Services Window)

Purpose

Allows you to schedule a Target Skill or Service into a consumer's daily routines. (See Note below)

Getting There

1. Select Planning | Target Skills & Services from the main menu.
2. Select the skill or service that you wish to schedule from the list in the Target Skills & Services window.
3. Select the Start Up section (tab)
4. Push the Schedule button at the bottom right corner once the button becomes visible. The Schedule Objective form will open

Window Appearance

There are two lists on the upper portion of the window. One is for day of the week, another one is for time and activities. These show the consumer's current schedule. Two option buttons on the right side of the window allow you to Schedule/Unschedule the activity. If an activity is scheduled, it will show up in the bottom portion of the window.

To schedule a Target Skill or Service

a. Select a day of the week for which there are activities scheduled in the consumer's Daily Routines.

b. Select a time and activity.

c. Select the Scheduled option to schedule the item; select the Unscheduled option to unschedule the item. The day, time and activity will appear in the Current Schedule list for each day, time and activity the item is scheduled.

d. Repeat steps a, b, and c until the item is scheduled at all desired times.

e. Save information by selecting the Done button.

To view all times, activities and scheduled Target Skills/Services for a consumer, select Consumers | Daily Routines.

Tip

Items may be scheduled at multiple times and for as many days of the week as appropriate. Identify the logical times, based on ongoing activities, during which the service or teaching should be conducted (e.g., it makes sense to schedule bed-making during "8:00 AM WAKE," but not during "9:00 PM PREPARE FOR BED.")

Note

The consumer must have an existing time slot in Daily Routines in order for you to schedule a target skill or service. For instance, if you want to schedule a training session for the target skill "ball catching" at 10:00 am on Tuesday and Thursday, first go to the consumer's Daily Routines and create items in the schedule for those times. You might call the activity "training." Then follow the directions above to schedule "ball catching" into the time slots you have created.

Technical Support

Technical Support (785) 272-5501

When calling for technical support, please have the following information handy:

- serial number (from About... in Help or the inside front cover of the User's Guide)
- version number (from About... in Help)
- operating system (e.g., Linux, Windows '95, '98, NT, 2000, XP, Vista)
- wording and number of any error message
- a description of what happened when the problem occurred.

Technical support may also be obtained by

- fax (785) 272-5152
- e-mail support@monacoassociates.com
- internet www.monacoassociates.com

Support services are subject to Monaco & Associates' prices, terms, and conditions in place at the time the service is used.

Glossary

active window
The visible window on the screen from which you work by copying, editing and saving its contents. A visible window becomes active when you select it with the mouse. EC3 highlights or shades the window border and title bar of an active window.

Applies to
All windows.

administration
Tasks that assure the safe and functional operation of EC3, including critical database maintenance functions (i.e., archiving and restoring records), monitoring system use, and setting user access levels for security and confidentiality of records, preference, service assignment, and customizing workspace.

agency forms
Commonly-used forms such as Admission Agreement, Consent for Release of Information, and General Medical Consent.

archive
Consumer, staff and plan data that is no longer current may be copied or removed from the working database of EC3 and then stored on the hard drive or on a diskette. Archiving data with the delete option clears the database of unneeded or inactive information, saves space and improves system performance.

Applies to
Record Management Window

archive consumer information
Copies Profile, Daily Routines, Education, Employment, Medications, Relationships, Incidents, Budget, Notes, Service Participation and Consumer Forms from the working database to a separate file on a hard drive or diskette.

Applies to
Record Management Window

archive consumer plan
Copies Cover Page, Plan Text, Quarterly Reviews, Target Skills and Services, data from Data Entry, and Review Notes from the working database to a separate file on a hard drive or diskette (depending on space).

Applies to
Record Management Window

archive staff information
Copies the User Profile from the working database to a separate file on a hard drive or diskette. Inservice Records are copied and (if selected) deleted from the database. Service Assignments are deleted without being archived.

Applies to
Record Management Window

backward chaining
Multi-step tasks are taught one step at a time, beginning with the *last* step. Once the last step has been mastered, the second to last step is then taught. Teaching proceeds until the first step is mastered, at which point the entire task is considered learned.

Applies to
Skill/Service Wizard
Target Skills and Services Window

billing information
Includes information about the agency to bill to, your agency's provider number, place of service, type of service, CPT/HCPS, modifier, and number of units to bill. Only organizations listed in the Resource Directory as funding sources (i.e., private insurer, state, federal, or other funding source) are billable.

Applies to
Agency Billing

Billing: Notes
Billing: Target Skills & Services

category skill
Skill categories help organize skills in the Skill & Services Library. Categories of skills that come with EC3 are:

Attention & Concentration	Fine Motor Tasks	Personal Care
Bathing	Grooming	Recreation
Challenging Behavior	Gross Motor Tasks	Safety and Emergency Skills
Clothing Care	Housekeeping	Self-Advocacy
Communication	Meal Preparation	Self-Direction
Community Living	Medical Health	Sensory Awareness
Concepts & Discriminations	Mobility	Social Skills
Dressing and Undressing	Money Skills	Work-Related Skills
Eating	Perceptual-Motor Tasks	

When you add new skills to the skills library, you may create new category names.

Applies to
Skill/Service Wizard
Skill/Service Library Window

clipboard
A temporary storage area for cut or copied information. You can paste the contents of the Clipboard into another EC3 report or into a document in another Windows application.

Applies to
Cut, copy, and paste operations.

code
A single-character letter or number representing the level of assistance used during teaching.

Applies to
Levels of Assistance
Skill/Service Wizard
Master Levels of Assistance

component
Part of a complex behavior or task. A complex task or behavior divided into smaller or graded units (components) to make it easier to teach.

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

component & correct/incorrect
Record a plus (+) if the learner completes the response correctly at the targeted level of assistance; otherwise, record a minus (-).

Applies to
Skill/Service Wizard
Target Skills and Services

component & level of assistance
Record the component (step, approximation, question, or stimulus) number and code that corresponds to the level of assistance used to correctly complete a component.

Applies to
Skill/Service Wizard
Target Skills and Services

component type
Steps of a task analysis, successive approximations to a terminal target behavior, questions and answers, stimulus/response pairs, or no components for a single target behavior to increase or decrease.

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

condition
Statement of the conditions under which the behavior will occur, such as "given a built-up handled spoon" or "when asked." Usually the first clause of an objective statement.

Applies to
Skill/Service Wizard
Target Skills and Services

confidentiality
The ability to restrict a user's access to Consumer Information to a subset of possible consumers.

Applies to
User Profile

consumer forms
Forms you fill out and/or create for a consumer. You may use an agency form as a template for a consumer form.

Applies to
Consumer Forms Window

consumer information management
Consumer information includes historical and demographic information (Profile), information about consumer Education, Employment, Medications, Relationships, Notes, Service Participation, Budget, Incidents, Daily Routines and staff Service Assignments.

correct/incorrect
Record a plus (+) if the learner completes the response correctly; otherwise, record a minus (-).

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

criterion for advancement
The degree of proficiency required to consider a targeted training step or step and targeted level of assistance mastered so that the teaching effort may shift to the next step or level. Used for forward chaining, backward chaining, shaping (successive approximations), and any errorless procedure (e.g., levels of assistance presented from most to least assistance).

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

criterion for completion
Statement of the criteria for accomplishing the teaching objective for the Target Skill. It specifies

level of performance
the accuracy or goodness of a person's performance

measure of consistency
the amount of time that the individual needs to perform the skill at the specified level of performance and level of prompt before the skill is considered learned

Applies to
Skill/Service Wizard

Skill/Service Library
Target Skills and Services

customization
Customizable features of EC3, include user access, Preferences, agency and consumer forms, Plan Templates, the Skill & Services Library, the Medication Library, the Resource Directory, Daily Routines and teaching strategy elements. The ability to modify these features minimizes redundant work. Customizing does not end at the agency level since all elements may be further personalized per individual consumer.

data entry
Allows you to enter progress data obtained during the course of strategy implementation for the Target Skills and Target Services of a consumer's plan. The Data Entry command presents a data input window formatted to match the strategy.

Applies to
Target Skills and Services

Data Entry Target Service data entry instructions
Record the Date, Time, a Score and Comment each time the service occurs.

Applies to
Target Skills and Services
Data Entry

data sheet
A printed form used to gather information for a Target Skill or Target Service.

Applies to
Print It!

data summary
Organizes the data you have entered in graph and table formats according to criteria that you select, to help you determine the effectiveness of the strategies being used to accomplish the objectives set for Target Skills and Target Services of a consumer plan.

Applies to
Target Skills and Services
Data Analysis
Review Notes

date (data entry)
The date the teaching or service occurred. Enter as MM/DD/YY (e.g., '08/24/96').

Applies to
Data Entry

date (planning meeting)
The date, entered mm/dd/yy (e.g., '08/24/96'), of the planning meeting.

Applies to
Planning Schedule

days in the review period
Specify the number of days per review period, (such as 30 days for monthly reviews). This number will be used by the system to generate reminders for when periodic reviews are due.

Applies to
Target Skills and Services

decrease single target behavior
A method for eliminating or decreasing an undesirable behavior (e.g., hitting self in head or flushing the toilet at an inappropriate time).

Applies to

Skill/Service Wizard
Target Skills and Services

direction of assistance
most to least Also known as "errorless" teaching, the instructor begins by giving the learner the level of most assistance. As the learner demonstrates mastery of the behavior over the course of successive trials, the instructor systematically "fades out" cues by working toward the level of least assistance.

least to most When an error occurs or if the learner otherwise fails to respond correctly, the instructor intervenes by giving the least level of assistance, working systematically toward as much assistance as needed to accomplish the behavior or component.

Applies to
Skill/Service Wizard
Target Skills and Services

duration
Record the amount of time a target behavior lasts. Calculated by noting onset time and offset time, and subtracting the former from the latter.

Applies to
Skill/Service Wizard
Target Skills and Services

effective date
The mm/dd/yy of the date of the beginning of the new consumer plan of teaching and services.

Applies to
Planning Schedule

expected completion
An estimated date (month, day and year) the Target Skill or Target Service will be completed *or*, for Target Services that are ongoing or continuous, you may specify just the frequency with which the service will be reviewed and leave this field blank.

Applies to
Target Skills and Services

facilitator
The person who will lead the planning meeting. Select from the options available or enter a different name.

Applies to
Planning Schedule

font
A set of characters with a specific design; also called a typeface or type style. Each font has one or more sizes (measured in points) to choose from.

forms
Use the EC3 Agency Form Designer to create all commonly-used agency forms such as planning meeting signature pages, and consent forms. These will then be available for printing whenever needed and can be copied into Consumer Forms.

Forms reports
User-created forms.

forward chaining
Multi-step tasks taught one step at a time, beginning with the *first* step. Once the first step has been mastered, the second step is then taught. Teaching proceeds until the last step is mastered, at which point the entire task is considered learned.

Applies to
Skill/Service Wizard
Target Skills and Services

frequency
Record the number of times a target behavior occurs.

Applies to
Skill/Service Wizard
Target Skills and Services
Data Entry

general instructions
Directions to the instructor for how to proceed with teaching a skill or providing a service. When the Skill/Service Wizard is used the general instructions are imported from Master Teaching Instructions (via Options | Customize | Teaching Instructions) and may be individualized before data is entered through Data Entry.

Applies to
Skill/Service Wizard
Master Teaching Instructions
Target Skills and Services

goal
Major outcome to be expected for the individual. Used for grouping similar Target Skills and Target Services together. May contain a brief goal statement and mm/yy expected completion date.

A goal is a higher-level target, a target under which other targets may be nested.

Applies to
Skill/Service Wizard
Target Skills and Services

graph_features
Select the type and style of graph you wish to see.

Applies to
Target Skills and Services
Data Analysis

group_by **grouping (data analysis)**

Select	To
All Data	view each item of data for the selected review period. For a Target Service, this is the only option available.
Session (time of day)	view data grouped by session(s) within days.
Day	view data grouped by date.
Month	view data grouped by month.
Component Analysis	view data for a total task method grouped by item by item, collapsed over units of time.

help
Selecting this button allows you to access context-sensitive help pertaining to the form you are currently using.

highlight
While writing reports you use highlighting in conjunction with the Edit menu commands. Point to the area with the mouse and drag the mouse pointer up, down or across within the selection area.

increase single target behavior
A method for increasing a simple skill that a person needs to learn to perform, usually under specific conditions (e.g., flushing the toilet after using it).

Applies to
Skill/Service Wizard
Target Skills and Services

inservice training information
EC3 keeps track of staff training by allowing you to enter information about each inservice training event and to individualize participating staff records for each event.

instructions for recording data
Directions to the instructor for what to record while teaching a skill or providing a service. When the Skill/Service Wizard is used the instructions for recording data are imported from Master Teaching Instructions (via Options | Customize | Teaching Instructions) and may be individualized before data is entered through Data Entry.

latency
Record the amount of time it takes before the learner starts performing the target behavior following the appropriate stimulus cue.

level of assistance
A degree of help provided to the learner to successfully complete a behavior or component of a task (e.g., verbal instruction, gesture, light physical touch, full physical guidance through the correct response). When the Skill/Service Wizard is used the levels of assistance are imported from Master Levels of Assistance (via Options | Customize | Levels of Assistance) and may be individualized before data is entered through Data Entry.

Applies to
Skill/Service Wizard
Target Skills and Services
Master Levels of Assistance

mailing labels
Prints mailing labels (Name, Address, City, State, and Zip) for selected Consumers or for consumer Relationships on Avery labels 5160.

materials
The specific objects needed for the implementation of a teaching strategy. May include special environmental arrangements such as over-sized clothing for teaching dressing, color-coded materials, or adaptive equipment. When the Skill/Service Wizard is used the materials are imported from the Skill & Services Library and may be individualized before data is entered through Data Entry.

Applies to
Skill/Service Library
Target Skills and Services

meeting place
The location where the planning meeting is to be held.

Applies to
Planning Schedule

messaging
The ability to use EC3 to send electronic communication to and receive electronic communication from other EC3 users, including automatic notification of planning meetings.

note
You can enter a note consisting of up to 250 characters.

number
A user-defined reference number for a Target Skill or Target Service.

Applies to
Target Skills and Services

objective

Target Skill	Identifies the expected outcome of a teaching strategy.
Target Service	The non-training support to be provided to assist the consumer to achieve certain goals.

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

objective statement
A description of what an individual will *be able to do* as a result of teaching or a service.

planning
Includes scheduling consumer plans, the development of planning documents, and the design of Target Skills and Target Services. Every aspect of planning and implementation is amenable to individualization to meet the unique needs of each consumer.

PlanTemplate
A framework for a consumer plan. Includes all of the aspects that need to be addressed and explored in preparation for arriving at a consumer's plan of services and teaching. Plan Templates are forms that are created by the user and saved in Form Designer and may be subsequently used as the basis from which the Plan Text of a consumer's plan is developed.
Once the Plan Template is imported into a consumer's Plan Text, it may be further personalized to exactly suit that person's strengths, needs and interests.
Several Plan Templates have been provided with EC3 that you may use "as is" or modify and adapt to fit your needs.

Applies to
Planning Schedule
Agency Forms

priority
Binary prioritization (immediate/non-immediate) is available:

Immediate	Target Skills and Target Services will be carried out immediately, corresponding to the Start Date.
Non-immediate	Target Skills and Target Services will be implemented contingent on some event, such as completion of another Target Skill or Target Service.

Select from the two available choices, or directly type in a priority level of your own, such as high, medium, or low priority).

progress review
Review of each Target Skill or Target Service in a consumer plan facilitates evaluation of progress in plan implementation so that corrective action may be taken to assure continuous progress.

Applies to
Review Notes
Target Skills and Services

questions & answers
A set of questions and correct answers surrounding a central theme (e.g., What Happens During a Medical Examination) targeted for teaching.

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

raw data
Progress data for a consumer's Target Skills and Target Services that was entered through Data Entry.

reinforcers
One or more rewards suitable for motivating the learner to perform the task to the best of his/her ability.

Applies to
Target Skills and Services

reminders
EC3 provides reminders to staff members of any responsibilities to review services, to participate in meetings, to

provide direct services, and a simple user-defined "to-do" list.

reports
Reports organize information from the EC3 database about consumers, staff, and administration. Some reports yield summary statistics.

Applies to
Print It!

Resources
A business or organization that provides services to consumers. A resource may be a school, employer, community program, or other service provider or service funder.

Applies to
Resource Directory

responsible person
The name of the person responsible for seeing that the Target Skill or Target Service is carried out. Select from the options available.

Applies to
Target Skills and Services

restore
Consumer, staff and plan data may be returned to the EC3 working database once it has been archived and deleted. Reasons for restoring data may include return of an individual to the agency or transfer of consumer records to your agency from another agency that uses EC3.

Applies to
Record Management

restore consumer information
Restores the consumer Profile, Daily Routines, Medications, Relationships, Service Participation, Budget, Incident, Education, Employment, and Notes from a separate (archived) file to the working database.

Applies to
Record Management

Restore Plan
Restores the Cover Page, Plan Text, Quarterly Reviews, Target Skills and Services, data from Data Entry and Review Notes from a separate (archived) file to the working database.

Applies to
Record Maintenance

review date
EC3 fills in the system's (current) date automatically, but the date may be over-ridden if this option was selected in Preferences.

Applies to
Review Notes

review note
You can enter a note consisting of up to 250 characters.

Applies to
Review Notes

review period
The mm/dd/yy of the first and last days of the period of time covered by the Review Note. EC3 fills in these dates automatically based, in part, on the Days in the Review Period field in Target Skills & Services. The beginning and ending dates are modifiable by the author of the Review Note.

Applies to
Review Notes

reviewer
The name of the person responsible for reviewing the overall plan and associated Target Skills and Target Services. The reviewer is designated for each consumer plan in Planning Schedule.

Applies to
Review Notes

score
Enter a frequency, duration, or latency score, or select correct/incorrect, or level of assistance, depending upon the teaching method used. Reflects the quality of the learner's response.

Applies to
Data Entry

security
Protection that unauthorized users do not log on to EC3 and that authorized users only use those features of EC3 to which they have been given read-only or read/write access.

Applies to
User Profile
Sign On

selection
Highlighted text.

series of objectives, successive approximations
A set of two to sixteen related objectives created to establish a new behavior, step by step, by teaching more and more similar approximations to the final desired form. The objectives are set up by the Skill/Service Wizard to be taught in a series, with advancement to the next objective dependent on the successful completion of the previous objective of the series.

Applies to
Skill/Service Wizard
Target Skills and Services

series of objectives, task analysis
A set of two to sixteen related objectives created from breaking a complex behavior down into smaller and more basic components for the purpose of facilitating learning. The objectives are set up by the Skill/Service Wizard to be taught in a series, with advancement to the next objective dependent on the successful completion of the previous objective of the series.

Applies to
Skill/Service Wizard
Target Skills and Services

Service Assignments
Linking consumers with those staff members who provide services.

session
A period of instruction consisting of one or more repetitions of a task.

Applies to
Date Entry

shaping
A method of teaching a new behavior using a series of progressively more difficult steps which are successive approximations to the skill to be mastered by the learner. Components are taught one at a time, beginning with the easiest step and ending with the most difficult and final form of the behavior.

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

s**hortcut keys**

Shortcut keys cause commands and actions using the keyboard instead of the mouse. A shortcut often consists of CTRL, SHIFT or ALT keys pressed in combination with letter, symbol, or function keys.

Skill/Service Wizard
Guides you through the process of creating objective statements and teaching strategies.

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

skill components

steps of a task analysis	Steps of a task to be performed by the learner in the order listed.
successive approximations	A series of progressively more difficult approximations to the skill to be mastered, one at a time, by the learner.
questions and answers	Questions to be asked of the learner and corresponding correct answers.
stimulus/response pairs	Stimulus items to be presented to the learner and corresponding correct responses.

When the Skill/Service Wizard is used the components are imported from the Skill & Services Library and may be individualized before data is entered through Data Entry.

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

skill & services library
A collection of skills and related information that you may use to create individualized teaching strategies.

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

specific service
A specific service is provided by a resource (organization or business). Some resources provide more than one specific service (e.g., the local ARC may be an employer, funder, and service coordination provider); other resources may provide only one specific service.

Applies to
Resource Directory
Service Participation

staff information management
Staff information includes User Profile, inservice training records, the staff member's daily schedule, and Service Assignments.

start date
The mm/dd/yy that the Target Skill or Target Service is scheduled to start.

Applies to
Target Skills and Services

starting instruction
A brief and consistent phrase or gesture. For a Target Skill, what the trainer says to the learner to cue initiation of the target behavior or task (e.g., "John, time for you to lock up for the night."). For a Target Service, may be a descriptive phrase of what is about to happen (e.g., "Larry, it's time to go see the dentist.").

Applies to
Target Skills and Services

status

Status is initially set when a Target Skill or Target Service is first created, and may be one of three types:

Active	Teaching or service is currently ongoing. Reported on in the Review Notes, is ready to accept data through Data Entry, and appears on consumer Daily Routines and Staff Reminders: Assignments.
Inactive	Teaching or service is suspended but may be provided at a later date.
Discontinued	Teaching or a service will no longer be provided.
Met	For teaching Target Skills the completion criterion was satisfied; for Target Services, the service was successfully completed.

Applies to
Target Skills and Services

stimulus/response pairs
A set of stimulus items and associated responses (e.g., printed words and pictures of their referents) targeted for teaching stimulus equivalence, a condition in which one stimulus becomes a substitute for another in eliciting a response.

Applies to
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strategy
Strategies are instructions that describe in detail what staff are expected to do in order to assist a consumer to acquire Target Skills or to provide Target Services to a consumer.

Applies to
Skill/Service Wizard
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subject
Keyword(s) used to describe notes or messages.

Applies to
Notes
Messages

successive approximations
Establishing a new behavior, step by step, by teaching more and more similar approximations to the final desired form.

Applies to
Skill/Service Wizard
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Summary Period

Select	For
Current Review Period	all data from the next period in which a review is due.
Year to Date	all dates for which their is data.
Other	to set your own summary period.

Summary statistics
Depending upon the teaching method and type of data, you may select from up to 25 unique statistics.

Applies to
Target Skills and Services

system date/time

By using the Date/Time option (accessed via Control Panel | Date/Time in the windows Program Manager Main program group), you can change the date and time of your system clock. It is important that your system date and time are always accurate. Many applications, including EC3, use your system date and time to record important information.

target behavior
The name of the final form of the skill to be learned.

Applies to
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task analysis
A complex behavior that is broken down into smaller and more basic components for the purpose of facilitating learning.

Applies to
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Teaching Method
A specific procedure or approach to teach a consumer how to perform a Target Skill. The teaching method options depend on how the skill has been analyzed into smaller or graded units (components) for the purpose of making it easier to teach:

Component Type **Teaching Method(s)**

Componenet Type:	**Valid Teaching Methods:**
steps of a task analysis	forward chaining backward chaining, or total task
successive approximations	shaping
questions & answers	total task
stimulus/response pairs	total task
no components	increase single target behavior, or decrease single target behavior

Applies to
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time (Data Entry)
The (approximate) time the teaching or service occurred (optional, used to group data by Session).

time (Planning Meeting)
The scheduled time of the planning meeting.

Applies to
Planning Schedule

t**itle (skill)**
A reference name for the skill.

Applies to
Skill/Service Wizard
Skill/Service Library

title bar
The bar at the top of a window that shows the name of the window, file or report.

title target skill/service
A short-hand way of referring to a Target Skill or Target Service for reports, lists, and so forth.

Applies to
Target Skills and Services

total task (questions & answers)
A method of teaching a skill (academic in nature, e.g., knowledge about some subject) where all questions/answers are targeted for presentation during a trial, and answers are recorded for each question. Teaching proceeds on all questions until every item is mastered to a specified criterion, at which point the entire task is considered learned.

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

total task (stimulus/response pairs)
A method of teaching a skill where all stimulus-response pairs are targeted for presentation during a trial, and data is recorded for each. Teaching proceeds on all stimulus-response pair until every component is mastered to a specified criterion, at which point the entire task is considered learned.

Applies to
Skill/Service Wizard
Skill/Service Library
Target Skills and Services

total task (steps of a task analysis)
A method of teaching a skill where all steps are targeted for presentation during a trial, and data is recorded for each step. Teaching proceeds on all steps until every step is mastered to a specified criterion, at which point the entire task is considered learned.

Applies to
Skill/Service Wizard
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trial
A complete repetition of the full task within a session.

Applies to
Data Entry
Target Skills and Services

User Query SQL
EC3 created SQL (structured query language) statement used to get the data for your report. You can also edit it or write your own SQL statement.

Applies to
User Query

value
The numerical value assigned by EC3 to a particular level of assistance when the data is entered, for purposes of mathematical calculations. The higher the level of assistance, the lesser the value.

Applies to
Levels of Assistance
Master Levels of Assistance

version
A 10-character label to identify the source of new skill entries, for your future reference. Library contents that came with the system are identified as EnCompass versions to differentiate them from the ones you add.

worksheets
Fill-in-the-blank worksheets are provided to record information for later entry into EC3.

Applies to
Print It!

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