

# E.II Navigation (Updated 8/21/2014)

This document contains instructions and tips for navigating and using E.II.

To access the E.II login page, click [here](#) or type [www.ewcho.org](http://www.ewcho.org) in the address bar of your browser.

Click the links in the table of contents for quick navigation of the document.

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## Basic Navigation

1. Use buttons in E.II (at the top, under the logo) instead of browser back or forward buttons.



- a. Click "Back" to go back one page.
- b. Click "Home" to go back to the main menu.
- c. Click "Logout" to log out of E.II.
- d. Click "Help" to access E.II help documentation.
- e. Click the envelope to check your messages list for informational notices.

2. Sub-menus are found on the left side of the main menu. Use the sub-menus to access specific functions or forms.

- a. For example: to view Progress Notes, first click **Progress Notes** on left side of main menu.

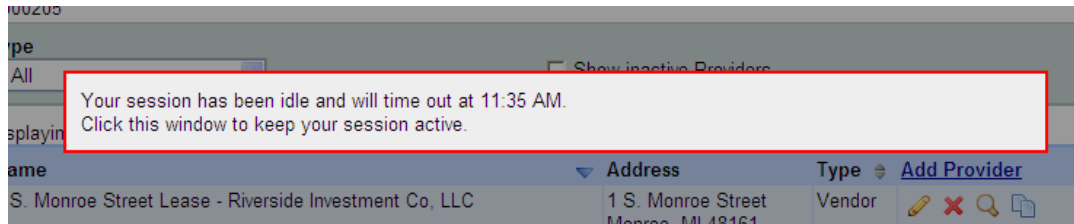


- b. Then, click

3. At the bottom of most forms, click "Save & Exit" or "Save" to save. (Save frequently to prevent losing work!)



- E.II automatically logs you off after 59 minutes of inactivity. If you see the time out warning below, click on the white box BEFORE the time shown. This will reset the time out clock.



## Tips for Using E.II Efficiently

- Sometimes it's useful to have E.II open in multiple windows. E.II allows users to be logged into multiple windows.
  - For example: it may be useful to write a progress note on one window while using another window to look up consumer information.
- Create your own custom home page with the links you use most often.

- Mouse over menu items and click **ADD TO FAVORITES** to add items to your **My Favorites** menu.



- Make your "My Favorites" page your Home Menu by clicking **User Preferences**
- In the "Home Menu" section, select "My Favorites" using the drop-down.

- On the main menu, check your **To Do** list for items needing your attention.

- You will receive an email notification regarding To Do items that are more than a day old.

- The **Search** button at the bottom of the main menu searches for menu items, not consumers.

- At the bottom of most forms, click "Save & Exit" or "Save" to save. (Save frequently to prevent losing work!)

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- Although E.II has a built-in spell-check, it's not as good as the built-in spell-check of some Internet browsers. Two browsers with spell-check are listed below. Click the links and follow the instructions to install.

- Google Chrome: <https://www.google.com/chrome/browser/>
- Mozilla Firefox: <https://www.mozilla.org/en-US/firefox/new/>

- The easiest way to access consumer information such as addresses or phone numbers is to use the header of the consumer chart. (Details provided in the “Navigating the Consumer Chart” section, below.)

## How to Search in E.II

- The following is a specific example of searching for a consumer. However, E.II uses a similar process when searching for providers, encounters, forms, etc.
- Search Options are simplified: type in anything, press the enter key, and E.II will show matching results.

**Search Options**  
 Enter any part of the Consumer's name, the Date of Birth, the SSN, MedicaidID or Case Number to filter the search results

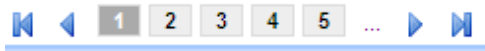
11

Search AKA Field  Show inactive Consumers

Displaying 1 - 1 of 1 Consumer

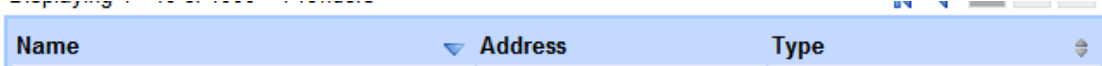
Name	Case #	SSN	Date of Birth	Case Status
John Doe	11	---	---	<b>OPEN</b> (Washtenaw, Lenawee) <a href="#">Select</a>

- The easiest way to search for a consumer is by Case Number.
  - If a Case Number is not readily available, try searching by entering part of the consumer’s first and last names.
  - If that doesn’t work, try searching by Date of Birth.
- If you don’t find the consumer you’re looking for, click  Show inactive Consumers
  - If you’re searching for a form, there will often be a checkbox saying “Show inactive (blank)”.
  - For example:  Show inactive Progress Notes
- If there are many results over multiple pages, use these buttons to navigate:




- Click a number to jump to a specific page
- Click ◀ to go back one page.
- Click ▶ to go forward one page.
- Click ⏪ to go to the beginning.
- Click ⏩ to go to the end.

6. Lists can be sorted by any column heading with triangles.




- a. The blue triangle shows how the list is currently sorted. (In the example above, the list is sorted by Name.)
- b. Clicking the up/down grey triangle will sort the list ascending/descending, respectively.

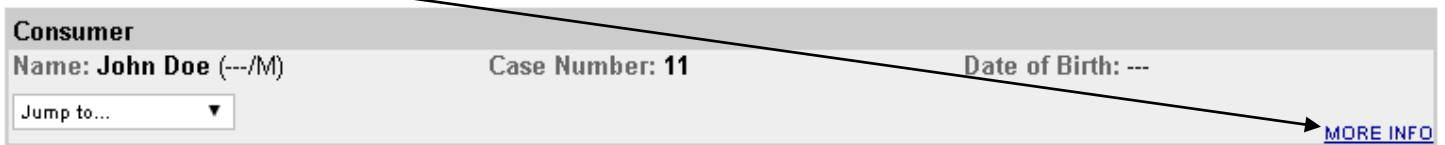
7. These four icons often appear when searching: 

- a. Click the pencil to change or edit.
- b. Click the red X to delete.
- c. Click the magnifying glass to view (without the ability to edit).
- d. Click the two sheets to copy.

8. When finished searching, click [Select](#) to make a selection.

## Navigating the Consumer Chart

- 1. The following is a specific example of navigating the consumer chart. However, E.II uses a similar navigation process for other forms and modules.
- 2. From the main menu,
  - a. On left, click **Consumer Management**
  - b. Then, click  [View Consumer Chart](#)  
View Consumer Chart
- 3. Search for a specific consumer. (See “How to Search in E.II”, above.)
- 4. Click [MORE INFO](#) on the right side of the header to see more consumer information.



Consumer		
<b>Name:</b> John Doe (---/M)	<b>Case Number:</b> 11	<b>Date of Birth:</b> ---
<b>Address</b> 127 Spring Street Ypsilanti, MI 48197	<b>Current Admission(s)</b> ⓘ Lenawee Washtenaw	<a href="#">Chart Review</a> <a href="#">Health Information</a> <a href="#">Diagnosis</a>
<b>Home Phone</b> (123) 456-7890	<b>Work Phone</b> ---	<b>Eligibility:</b> 08/14 (none) ⓘ MPHI Inquiry <a href="#">Current Month</a> <a href="#">Full Year</a>
Jump to... ▼		<a href="#">LESS INFO</a>

- a. Mouse over ⓘ next to “Current Admisison(s)” for primary case holder and contact information.
  - b. Mouse over ⓘ next to Eligibility to check a consumer’s eligibility for Medicaid, MiChild, ABW, Medicaid Deductible, etc. ☒
5. The consumer chart allows easy access to many forms including Demographics, Pre-Screening Assessment, Bio/Psycho/Social, and many more.
  6. The consumer chart also allows for easy switching between consumers.

- a. At the bottom of the consumer chart, find the “Switch to Consumer” section.

**Switch to Consumer**

11	John Doe	🔍 ✖	Switch Consumer
CASE #	NAME		

- b. In the “Case #” box, enter another case number.

**Switch to Consumer**

12	John Doe	🔍 ✖	Switch Consumer
CASE #	NAME		

- c. Click outside the “Case #” box to update the “Name” box.

**Switch to Consumer**

12	Jessie C. Client (TEST)	🔍 ✖	Switch Consumer
CASE #	NAME		

- d. Click “Switch Consumer” to access the select consumer’s chart.





## Entering a Progress Note

1. The following is a specific example of entering a progress note. However, these techniques can be applied when filling out other E.II forms or using other modules.
2. From the main menu,
  - a. On left, click **Progress Notes**



[View Progress Notes](#)

View Progress Notes for a consumer

- b. Then, click
3. Search for a specific consumer. (See “How to Search in E.II”, above.)
4. Select an existing progress note OR click [Add Progress Note](#)
  - a. Document status can be draft, unsigned signature, or signed.
5. The “Date” field pre-fills. If entering a different date:
  - a. Enter 2 digits for month, day, and year OR use the calendar button. 
  - b. (For example: 010108 = 1/1/2008.)
6. Enter time using military time OR click the clock to insert current time. 
7. Mouse over the blue “i”  next to “Contact Type” for more instructions/information.
8. Fields like “Contact Type” and “Location of Service” are filled with a drop-down list.
  - a. Click the field.
  - b. Then, click to select an option OR type the first letter of the value you want to enter. (Keep typing the first letter until the value you need appears.)
  - c. For example: Click “Location of Service” then press the “h” key three times to select “Hospital”.
  - d. Click away from the field when finished.
9. Fields like “Primary Care Physician” and “Primary Care Clinic” are filled with a lookup/search.
  - a. Click the magnifying glass. 
  - b. This will bring up a search window. (Please consult the “How to Search in E.II” section, above.)
10. If Narrative field does not have spell-check, you may need to install/use a different Internet browser.
  - a. Please consult point #5 of the “Tips for Using E.II Efficiently” section, above.

11. Click “Save” periodically to prevent loss of work.



12. When finished with a page, click a tab at the top or bottom of the page.

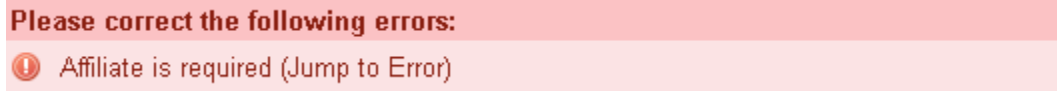


13. To come back and work on the form later, click “Save & Exit”.

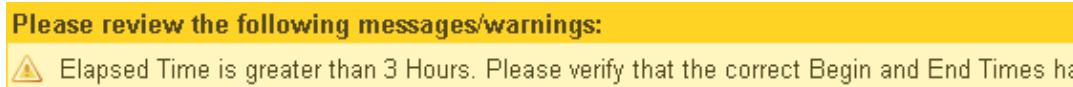


14. If there are any errors, a warning message will display at the top of the screen.

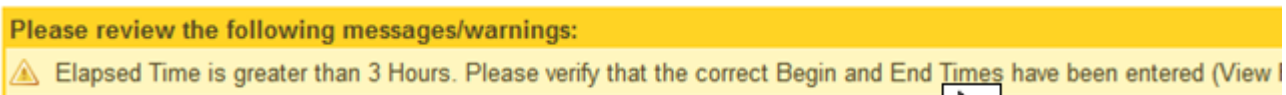
a. Pink errors can't be bypassed.



b. Yellow warning messages can be bypassed by clicking a button a second time.



15. Mouse over the error at the top of the screen to highlight the field(s) that need attention in pink:



**Progress Note**

Basic Info | Outcomes | ATO Information | SUD Information | Scans | Signatures

**General Information**

Date	Begin Time	End Time	Contact Type	Location of Service
08/19/2014	12:46 PM	06:21 PM	Face to Face	Hospital

16. Clicking the + icon adds space to enter more data.

a. For example: on the “Scans” tab, clicking + adds space for additional scanned documents.

17. When finished with the document, click the “Signatures” tab.

a. Sign the document by entering your password and clicking “Sign”.



**Electronic Signatures**

Staff Signature required by

1008806	Jeremy Yu	Enter your password to sign
ID	NAME	

Counter Signature required by

		Enter your password to sign
ID	NAME	

Sign