Juvare EMResource Resources & Statuses Training

A. Create a Resource

1. With appropriate rights, you can create resources by completing three steps:
    - **a.** Specify the resource details
    - **b.** Assign user access to the resource
    - **c.** Restrict visibility into the resource's status types
2. In the main menu, click **Setup** and then click **Resources.**
    - **a.** Click **Create New Resource.**
    - **b.** Enter this information.
        - **i.** Name - Name of the resource
        - **ii.** Abbreviation – Abbreviation of the resource
        - **iii.** Resource Type – Grouping of resources, such as by type or proximity; select from your region-defined list of types; on your region views, the resource's type defines how it is grouped with other resources, as well as its inherited status types
        - **iv.** Standard Resource Type – Predefined list of resource types or categories; this determines the resource's icon for display on the map view; you can also use it as a search term on a number of search pages
        - **v.** Reports HAvBED data – Select this check box to include information about the resource when reporting HAvBED data to HHS; to exclude the resource, clear this check box. If selected, the **State** must be specified.
        - **vi.** Share with Other Regions – Select this check box to share this resource's information with regions with which you have established and activated a mutual data sharing agreement; clear the check box to remove sharing of this resource
        - **vii.** AHA ID – American Hospital Association identification number. This information is required when sending resource-specific data, such as detailed HAvBED information (rather than state summaries), to Health and Human Services
        - **viii.** External ID – Unique identifier (primary key) for use with an external interface/program; this identifier is established outside of EMResource; contact Juvare for more information.
        - **ix.** Address – Enter the resource's street address, city, State, ZIP code, and county, if the **Reports HAvBED data** option is selected, **State** is required
        - **x.** Latitude / Longitude – After entering the resource's address, click **Lookup Address** to obtain the latitude and longitude for the resource; the system automatically populates the information in these fields and shows a map of the resource's location
        - **xi.** Website – Enter the resource's website address (URL)

xii. Contact Information – Enter the resource's contact information, such as the contact's name, address, phone and fax numbers, and email address

xiii. Notes – Enter notes or comments about this resource, as appropriate

xiv. View Rights – Select to automatically allow all users to view the resource. By default, this option is selected.

c. Click **Save.**

B. Status Creation and Management

1. To create a status, in the main menu, click **Setup** and then click **Status Types.**

a. Locate the status type and, on that row, click **statuses.**

b. Click **Create New Status.**

c. Enter this information.

i. Name – Name of status

ii. Color – Select the color of the status's font.

iii. Description – Enter a description for the status.

iv. Active – Select to make this status active and clear to make it inactive.

v. Status Update Frequency – Indicate whether the status should be updated whenever the status is changed or set an expiration time frame for the status.

vi. Upon expiration, auto change status to – Select the status to change to automatically when the status expires.

vii. Auto change status comment to – Enter the comment that is supplied when the system is set to change the status automatically upon expiration.

viii. Timer Type – Select the type of timer that is used when a status is set to expire or indicate no timer.

ix. Reset Time – Select the situation that resets the timer: when the status changes or on all updates.

x. Is a reason required? – Specify whether the user must select a reason for the status change.

xi. Status Reasons – Select the reasons to make available for this status.

xii. When updating status, comments are – Indicate whether comments are: Disabled, Optional, or Mandatory.

d. Click **Save.**

C. Status Reports

1. Status reports provide specific information about the statuses being reported by resources in your region during a specific period. These reports are generated mainly as PDF and CSV files. CSV files can be opened and edited with spreadsheet solutions, such as Microsoft Excel, or text editors.

a. To generate a Status Detail report, in the main menu, click **Report** and then click **Status Detail**.
   i. In **Start Date** and **End Date**, enter the date range for the report.
   ii. For **Report Format**, click PDF or CSV.
   iii. In the **Status Type** list, select the type.
   iv. Click **Next**.
   v. Select the checkboxes for the resources you want to include.
   vi. Click **Generate Report**.
   vii. Click the report to download it.

b. The process for generating a Status Summary report follows the same process.