A stylized graphic in shades of blue and yellow. It depicts a person's head and shoulders in profile, looking down at a large document or book they are holding. The person's hand is visible near the top of the document. The background is a mix of light blue and yellow, with some darker blue shapes suggesting the document's pages or the person's clothing.

**e-FINDS Training**

# **Participant Guide**

**Commerce Training Institute**

**Rev. June 2013**

## Before You Begin

### JOINING COMMERCE TRAINING INSTITUTE (CTI) SESSION

New York State Department of Health uses Cisco WebEx Technology to host online educational presentations during which participants can submit questions and comments. These training sessions are also known as Webinars. Below is a short list of requirements for participating in a Commerce Training Institute (CTI) Webinar.

### BEFORE ATTEMPTING TO JOIN A CLASS

Verify your Internet connection

Make sure the WebEx Training Manager plug-in can install

Disable pop-up blocking software or allow pop-ups for the domain <http://nysdoh.webex.com>

Be near a telephone for the audio portion of the presentation

To participate in NYSDOH on-line trainings, you must be able to install and use Internet browser plug-ins. This typically requires that you have administrative rights on the computer you intend to use for the training. If you do not have rights to install software on the computer you intend to use, or are unsure if you can install software on that computer, please contact your information technology staff before attempting to connect to the meeting.

The required plug-in is called WebEx Training Manager and is designed to self-install upon joining a meeting. If you prefer, the plug-in can be downloaded and installed ahead of time.

1. Go to <http://nysdoh.webex.com>
2. Click **Training** tab
3. Click **Set Up** from the left panel
4. Click **Training Manager**
5. Click the **Set Up** button



### POP-UP BLOCKERS

Pop-up blockers have been known to prevent participants from successfully joining NYSDOH Webinars. Please be sure to disable any pop-up blocking software or explicitly allow pop-ups from the domain <http://nysdoh.webex.com> before attempting to join the meeting.

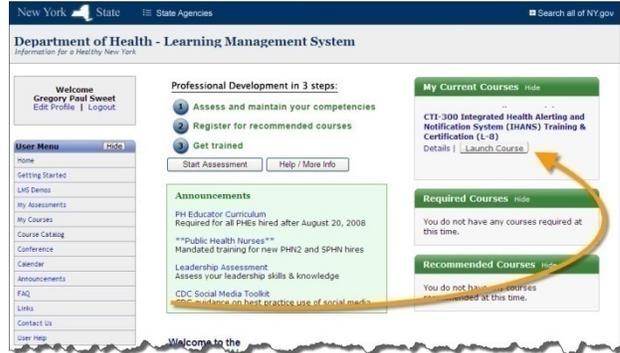
### ADDITIONAL ASSISTANCE

For additional help please contact WebEx technical support at 1-877-769-7228.

# To Join Your Class

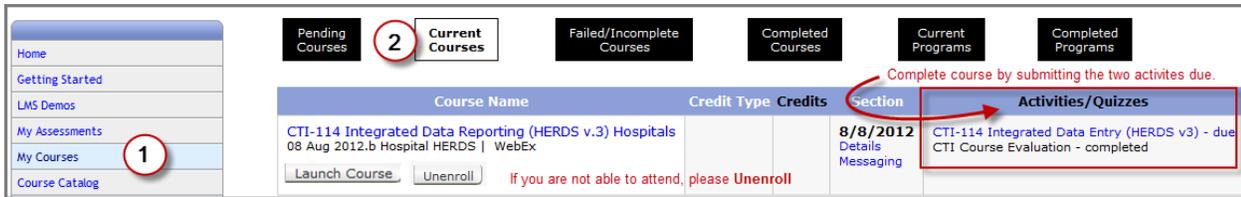
You can begin to log into your course 10-20 minutes prior to the scheduled session start time. Students are encouraged to arrive early to head off any technical issue they may encounter when joining the session.

1. Prior to the session start time log into the Learning Management System (LMS) at <https://www.nylearnsph.com>
2. Click **Launch Course** from the **My Current Courses** panel in the upper right of the LMS home page.



Alternately if you have hidden your **My Current Courses** panel, click **My Courses** in the **User Menu**

1. Click **Current Courses** (if not selected already).
2. Click **Launch Course** under the course heading.



For assistance with your Learning Management System password or user name, use the "Password Retrieval" function. Select the appropriate option and either enter you email address or answer your secret questions.

For further assistance with your LMS account, send email to: [edlearn@health.state.ny.us](mailto:edlearn@health.state.ny.us)



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## Welcome!

Welcome to the Commerce Training Institute's CTI-500 course on the Evacuation of Facilities in Disasters Systems (e-FINDS).

This course will prepare evacuating and receiving facilities on how to upload and update patient/resident location information in the e-FINDS application on the Health Commerce System

<https://commerce.health.state.ny.us>.

Please be sure to:

- Attend from a location with access to a telephone. A speakerphone or headset is highly recommended. Audio for this course is via telephone only; there is no voice-over-IP option.
- Work at your own computer. This is a hands-on course. Students may be expected to complete several exercises during this program. Group attendance from a conference room, etc. is not recommended.
- Print this participant guide and have it readily available when you come to class. This guide contains instructions and exercises for participating in the classroom activities.
- Check the syllabus for any pre-class assignments. It is very important that you complete any pre-class work if you are to participate in the online sessions.

In addition to the class work, this guide also contains several resources such as a handy guide to the tools available within our on-line classroom and a glossary of terms to help you get the most out of your class.

Please note the password for this, and all Commerce Training Institute courses is **welcome2**.

We look forward to seeing you on-line!

Sincerely,

### **Gregory P. Sweet**

Learning Management Training Specialist, Synchronous Learning Expert  
NYSDOH

### **Valerie Shuba**

Learning Management Training Specialist  
NYSDOH

### **Tracy Spencer**

Learning Management Training Specialist  
NYSDOH

## **Program Description**

This course provides a solid foundation for registering and updating patient/resident location information during a public health event, such as a storm, flood, non-natural incident or practice exercise/drill.

This course will begin with a look at how to obtain access to the e-FINDS application, and how facilities will be notified that patient/resident location data is being collected. Course participants will be provided a demonstration of the new application including: user and administrator role permissions; how to register a patient/resident with a scanner and without; use a spreadsheet provided by the facility administrator role to register multiple patient/residents; update patient/resident tracking information; as an evacuating facility, and as a receiving facility; plus successfully update one patient/resident at a time, and then update multiples. As the facility administrator role, generate a patient/resident spreadsheet, as well as register multiple patient/residents without having wristbands available. The session concludes with hands-on exercises.

This course is presented in a one hour + scheduled session via WebEx Training Center.

## **TARGET AUDIENCE**

The target audience for this curriculum is all state and local health department, healthcare providers, and temporary shelter staff who will be responsible for entering and maintaining patient/resident tracking information in e-FINDS during declared operational periods.

## **OBJECTIVES**

### **As an Evacuating Facility**

- Locate and open e-FINDS on the Health Commerce System.
- Successfully register patient/resident with barcoded wristbands.
- Successfully register multiple patient/resident without pre-printed wristbands.
- Updated patient/resident information.
- Quick Search for patient/resident.

### **As a Receiving Facility**

- Updated patient/resident with wristbands.
- Updated patient/resident without wristbands or barcodes.

# Syllabus

## e-FINDS

### PREWORK

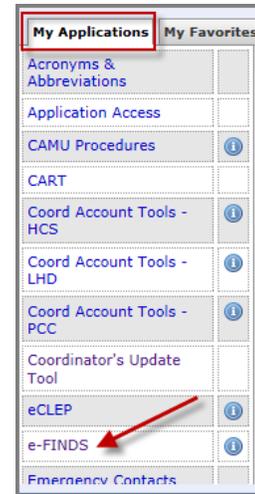
1. Have your Health Commerce System user ID and password available for use
2. Verify that your business and emergency contact information is correct
3. Confirm you have been assigned the proper role to access the new e-FINDS

The screenshot shows the 'My Account' page of the NYSDOH Health Commerce System (HCS). The page has a navigation bar with 'Home', 'Documents', 'Applications', 'My Account' (highlighted with a red box), 'Help', 'Contact Us', and 'Logout'. Below the navigation bar is a 'Print' button and a section titled 'I want to:' containing a list of links: 'Change my password', 'Change Secret Questions', 'Enable Forgotten Password', 'Learn more about HCS security', 'Look up my PIN', 'Look up my coordinators', 'Report my user ID or password stolen', 'Review the password rules', 'See what organizations I am affiliated with', 'See what roles I hold', 'Update or verify my contact information', and 'View the communications directory contact lists that I am on'. On the left side, there is a 'Welcome Your Name' section with a search bar and 'Advanced Search' link. Below that are 'My Applications' and 'My Favorites' tabs, with a list of applications including 'Acronyms & Abbreviations', 'Application Access', 'CAMU Procedures', 'CART', 'Coord Account Tools - HCS', and 'Coord Account Tools - LHD'. Two red arrows point from text boxes on the right to the 'See what roles I hold' and 'Update or verify my contact information' links. The text boxes contain the following instructions:

- Confirm you have been assigned the proper role assignment to access the new patient tracking application.
- Verify your business and emergency contact information is correct.

## Access to e-FINDS

- Role assignments will be granted by the facility's Health Commerce System Coordinator
- Two roles are available at the facility level: User and Administrator
- Once you have been added to the role, e-FINDS will appear in My Applications



### SYNCHRONOUS CLASS

DATE: \_\_\_\_\_

- Verify all prework has been completed
- Notify your coworkers you will be in class
- Clear away other distractions
- Log into your session at least 10 minutes early. You may log in as early as 20 minutes prior to session start time
- Print this participant guide and have it available during class

## Contacts & Logistical Training Information

### *Instructors*

#### **Gregory P. Sweet**

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Synchronous Learning Expert  
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Fax: 518-473-1615  
Email: gps03@health.state.ny.us  
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Email: vas06@health.state.ny.us

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\*Note: Do not call this number for technical support at the time of your class. Your instructor will be engaged in conducting the class and you will only reach his or her voicemail. For technical support once a class has begun, call Intercall WebEx Support at 1-877-769-7228.

---

### ***Technical Support for your Organization***

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

### ***Intercall WebEx Technical Support***

Phone: 1-877-769-7228

# Course Work for CTI-500

## Chapter 1: Overview



What is e-FINDS?

What does it do?

When is it used?

Actions of an evacuating facility:

- Register patient/resident
- Update patient/resident
- Generate barcodes spreadsheets

Actions of a receiving facility:

- Update patient/resident

**Notes:**

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## **Chapter 2: Role and Permissions**

What are the facility roles?

What can a facility administrator do that a facility user cannot?

**Notes:**

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## **Chapter 3: Training Scenarios**

### **TRAINING SCENARIO 1**

- A Hurricane is predicted to strike three NYS counties, and your facility resides in one of the identified counties
- Hurricane expected in three days
- Your facility plans to evacuate
- Wristbands have been received from NYSDOH

Demonstrates an evacuating facility would register patient/resident with barcoded wristband:

**Notes:**

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## TRAINING SCENARIO 2

- A bus has just arrived from an evacuating facility
- All patient/residents have barcoded wristbands, and need to be checked in

Demonstrates how a receiving facility updates patient/resident location information by scanning the wristbands.

### Notes:

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## TRAINING SCENARIO 3

- Patient/resident record needs to be updated, but user does not have a wristband

Demonstrates the Quick Search feature for finding patient/resident for viewing or updating information

### Notes:

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## TRAINING SCENARIO 4

- Another operation has started, and your facility plans to evacuate all patient/residents
- Facility has time to update information

Demonstrates how the facility administration role at the evacuating facility would to register multiple patient/residents.

### Notes:

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## TRAINING SCENARIO 5

- Another bus has just arrived from an evacuating facility
- There are no wristbands or any indication of a barcoded log sheet

Demonstrates how the receiving facility would update location information without having wristbands to scan.

### Notes:

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## TRAINING SCENARIO 6

- An evacuation is needed and your facility plans to evacuate all patient/residents, and has a little time to register the patient/resident via an Excel spreadsheet

Demonstrates how the evacuating facility administrator role generates the barcode spreadsheet, and how a facility user would upload the patient/resident information.

### Notes:

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## TRAINING SCENARIO 7

- Patient/resident is being sent to another intended destination and record needs to be updated
- Barcode is known, but there is no wristband

Demonstrates how the evacuating facility updates patient/resident information.

### Notes:

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## REVIEW QUESTIONS

1. What two steps would an evacuating facility take to initiate moving patient/resident in the e-FINDS?
2. You can find your HCS coordinator using \_\_\_\_\_ .
3. True or False: The facility user role can register multiple patient/resident without barcoded wristbands or a barcode sheet.

## **Chapter 4: Hands-on Exercises**

### **FACILITY DRILL**

- Your facility has been identified, for this practice exercise, as needing to evacuate to a temporary shelter
- The operation has been announced. In preparation for the drill, you have received wristbands from the New York State Health Department for your five residents. A colleague began registering the patient/residents, but could not finish

### **EXERCISES:**

1. Log into Commerce (if not already logged in <https://commerce.health.state.ny.us>)
2. Open e-FINDS (if not already open)
3. Select your location

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Note all facilities have access to the temporary shelters.

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4. Scan barcode or enter barcode manually: What is the patient/resident's name?
5. What is patient/resident intended location?
6. Register a patient/resident to be relocated.
7. Register multiple patient/resident from spreadsheet.
8. Update patient/resident to Shelter-In-Place.
9. Change intended destination for two patient/residents.
10. Receive patient/resident with barcode.
11. Update a patient/resident 's DOB.
12. Return the patient/resident (barcode) to original facility.

## Answer Key

1. Register patient/resident and assign to another facility
2. My Account
3. False

## Completing the course

To receive credit for participating in the training session, you must attend the scheduled WebEx session. Please allow 24-48 hours for the course administrator to complete you in the training.

Your feedback on the presentation is requested. To send us your comment about the training, please complete the course evaluation.

1. Log on to the learning management system [www.nylearnsph.com](http://www.nylearnsph.com)
2. Click **My Courses**
3. Current courses should be the active page, if it is not, click Current Courses
4. Under **Activities/Quizzes** click the [CTI Course Evaluation](#) and submit your comments.

# Commerce Training Institute Quick Reference Card

## MENU BAR:

Use the menu bar to access Training Center features.

## ANNOTATION TOOLS:

If enabled allows you to draw or type on documents, presentations and whiteboards.



Use to place your pointer on the screen.



Use to type text.



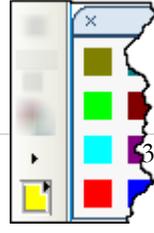
Use to draw straight lines and arrows.



Use to draw shapes.



Use to highlight items or draw freehand shapes and lines.



Use to select the color of your annotations.



Use to erase your pointers and annotations.

## SESSION NUMBER, TELECONFERENCE CONNECTED INDICATORS:

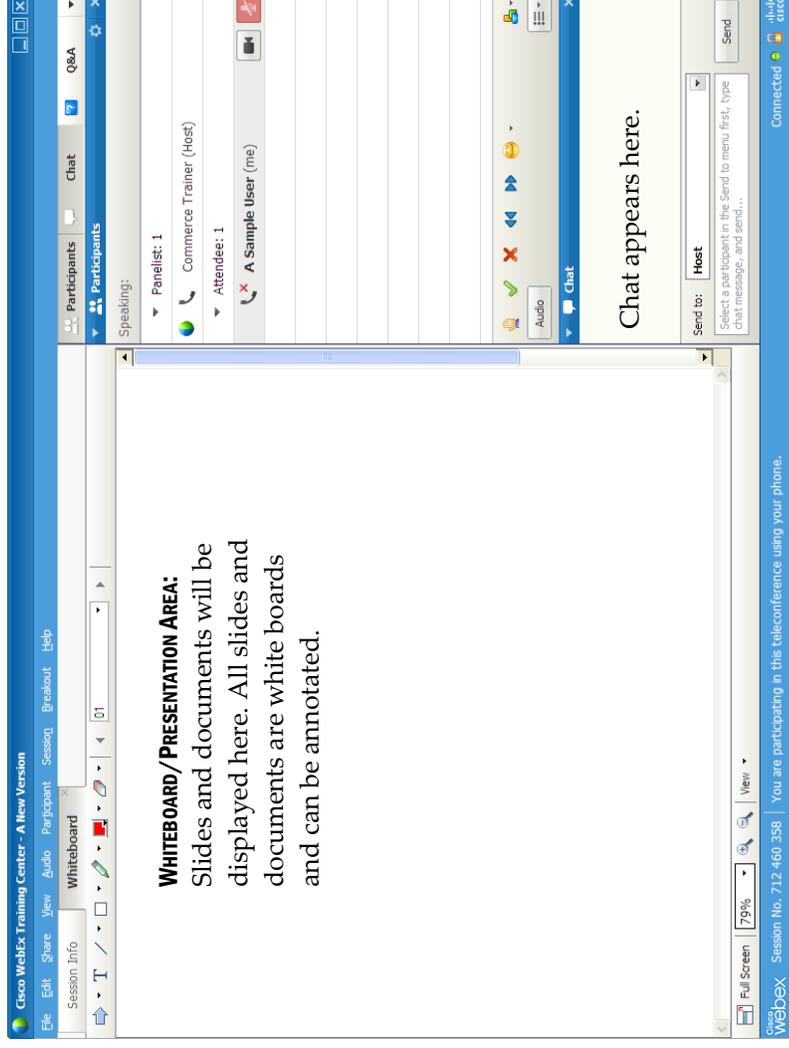
Displays the session number and indicates if you are connected to the teleconference.

## TABS:

If allowed, select which document, presentation, or whiteboard to view.

## PANEL BUTTONS:

Click to open a panel. Use the dropdown to find additional panels.



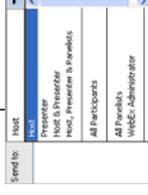
### WHITEBOARD/PRESENTATION AREA:

Slides and documents will be displayed here. All slides and documents are white boards and can be annotated.

Chat appears here.

## THE CHAT PANEL

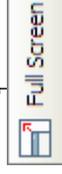
Send chat messages  
Type message in the message box.  
Select recipients.  
Click Send.



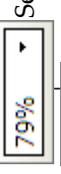
Select to whom you want to send the chat. Choices can be limited by the host.

## VIEW MENU:

Used to control your view of the presentation.



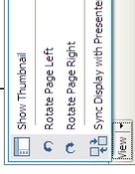
View full screen



Select zoom level



Zoom in & zoom out



Show or hide thumbnails.

Rotate page right or left.

Synchronize Display with presenter, use to synchronize your view with the presenter.

Go Slower Go Faster

Raise hand

Yes No

Emoticons

Poll Results

## PARTICIPANT PANEL:

Contains the list of participants and feedback buttons.

Teleconference connected

& Muted Click to mute/unmute



Participant name Webcam available (Click to broadcast to group)

Open Audio Options

Change Participant Panel View

## CONNECTED, SECURE INDICATORS:

Indicate if you are connected to the network (session) and if the session is secure. All BHNSM sessions are secure.