

ACCESSING EMTRAK 3.1

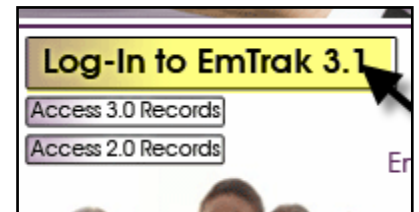
EmTrak is a browser-based application, meaning you access it on-line. (A software downloaded and used on your computer is called a client-based application). Another term you may have heard is ASP (Application Service Provider). That means rather than having to own expensive software and having to manage a server on-site, everything is done and managed through your on-line connection.

Offering EmTrak as a browser based application means you don't have to load any software, updates are automatic, everything is secure and automatically stored on our servers. But, with either choice, there are some limits and some challenges with programming. At times, as we go through this guide, I will try to ask the questions for you that you are thinking "Why can't EmTrak" That said, we have some gifted programmers who are constantly changing, updating and improving EmTrak – their creativity is unmatched. Now, let's get into it.

The website has changed. It is now <http://www.medemtrak.com/>. At this website, you can access both EmTrak and MED U.

To access EmTrak 3.1, you simply click on **LOG-IN TO EMTRAK 3.1**,

However, you will notice that you can continue to access 3.0 and 2.0 record by clicking on the other links. We will leave that access available until you tell us you no longer need it. In fact, folks can continue to work in 3.0 until they are ready to move everything over.



There are a couple of other things you will notice on the website. The first is this link to Profile XT. Profile XT is a pre-employment assessment instrument. The other link you may notice is the link to ISP (Integrated Screening Partners). ISP does complete background checks and has special pricing through The MED Group. I have detailed information on both in the INTERVIEWING MENU portion of this guide.

Finally, notice this access to MED University. For those of you who use MED University, you know the broad range of courses available, more than 120 courses covering almost every single element of HME for your employees. These are detailed and practical courses and the simple fact is; no one writes their courses nearly as well. Many of the features you are about to come upon involve MED U courses, as part of orientation or coaching or discipline. Eventually MED U and EmTrak will be one program, fully integrated. I would love to have you ideas on what that should look like. I hope you will notice there is a simple way to email information to MED U within EmTrak 3.1. If you have questions or suggestions, please contact Dr. Gary Schwantz at gschwantz@medgroup.com or call at 800.825.5633

GETTING STARTED WITH EMTRAK 3.1

There are two ways to access EmTrak 3.1, as a Super Manager or as a Manager. Who is the Super Manager? It is the HR Director or the CEO or some other designated person that is responsible for managing EmTrak and the performance management system in the company. The Super Manager has access to all of the employees and the employee records. The Super Manager also has the ability (and the responsibility) to configure the company so that EmTrak 3.1 can best meet its needs.

The other access is as a Manager. Obviously, the Manager is the one who has direct responsibility for evaluating and managing employees.

Both the Manager and Super Manager can:

- Create job descriptions
- Create new employees
- Do evaluations of every kind
- Create disciplinary, applause and training documents
- Put documents into the File Library
- Fully utilize the interviewing menu

The Super Manager has access to every employees, the Manager has access only to his/her own employees and department.

There are additional capabilities we will discuss later for the Super Manager: setting up the company, locking some documents, setting up managers and changing manager assignments.

When you log-in, you will see the screens below (Super Manager Menu on the left, Manager Menu on the right).



Super Manager Menu

Welcome Jim Smith! What would you like to do today?

CREATE...	VIEW...
Job Description	Job Descriptions
Employee	Employees
Manager	Managers
OTHER...	Introductory Evaluations
Edit Configuration	Training Documents
Change Manager Assignments	Coaching Documents
Archive Employees	Applause Documents
Open File Library	Disciplinary Actions
Open Interviewing Menu	Periodic Evaluations
Exit EmTrak & Close	Annual Reviews



Manager Menu

Welcome Pam Jones! What would you like to do today?

Employee Name	Employee ID	Job Description	Hire Date	Status
Elli Losiniecki	387821234	CSR Team Leader	3/23/2006	Inactive
Mary Jones	9236495151	CSR/Reimbursement Specialist	11/30/2005	Active
Tony Soprano	4444	Billing - Collections and Denials	10/7/2005	Active
Uma Thurman	976431	Reimbursement Specialist	11/14/2006	Active
William Shatner	676869	Reimbursement Specialist	11/14/2006	Active

- Create Job Description**
- View Job Descriptions**
- Create Employee**
- View Pending Documents**
- Open File Library**
- Open Interviewing Menu**
- Exit EmTrak & Close**

When a Manager clicks on an individual employee's name (or when Super Manager click on View Employees and clicks on an individual employee's name), this is the page that comes up.

There are separate chapters on each of the elements you see below, both in this guide and separately on this CD:



- [THE EMPLOYEE LOG](#)
- [ANNUAL REVIEWS](#)
- [COACHING DOCUMENTS](#)
- [PERIODIC EVALUATIONS](#)
- [TRAINING DOCUMENTS](#)
- [APPLAUSE DOCUMENTS](#)
- [DISCIPLINARY ACTION](#)

Edit Employee

Return to Menu

Employee Name William Shatner	Job Title Reimbursement Specialist
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View Employee Log

Date	Last 5 Log Entries (first 85 characters)	
11/29/2006	William was 2 hours late today - 2nd day this week	
11/29/2006	 SIGNED JOB DESCRIPTION ATTACHED	
11/01/2006	Annual Review created by Pam Jones on 11/01/2006	
10/29/2006	Coaching Document created by Pam Jones on 10/29/2006	
09/29/2006	Applause Document created by Pam Jones on 9/29/2006	

CREATE...	VIEW...
Training Document	Training Documents
Coaching Document	Coaching Documents
Applause Document	Applause Documents
Disciplinary Action	Disciplinary Actions
Periodic Evaluation	Periodic Evaluations
Annual Review Self-Evaluation	Annual Reviews
Annual Review	Introductory Evaluation
	Job Description