

# Selection Sets/Action Items

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To focus your work, use selection sets to tailor your desktop, and action item filters to display subsets of your action items in order to organize your activities.

## Create a Personal Selection Set

ACO/ARO and ACTS maintain records of thousands of facilities, certifications, surveys and complaints/incidents within each state or region. With My Selections, each user can focus the display of listed facilities and surveys to just the ones they need to see. For some states, narrowing the selection filter will also enhance performance.

Selection sets can be defined based on any combination of facility type, office/location (management unit), work unit, bed size, operation status, congressional representative, state region, and survey type and date.

You can create and save as many selection sets as necessary to meet your needs. Selections definitions may be visible only to the logged-on user, or you can share My Selection definitions with all other users by saving the selection as Public. You can define multiple selection sets that serve a variety of uses, but only one may be active at a time.

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### 1 Create new personal selection set

- Right-click **My Selections**
- Select **New Personal Selection**

A personal selection set is visible only when you are the logged- on user.

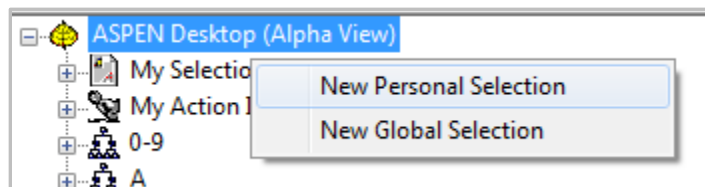


Figure 1: New Personal Selection menu option

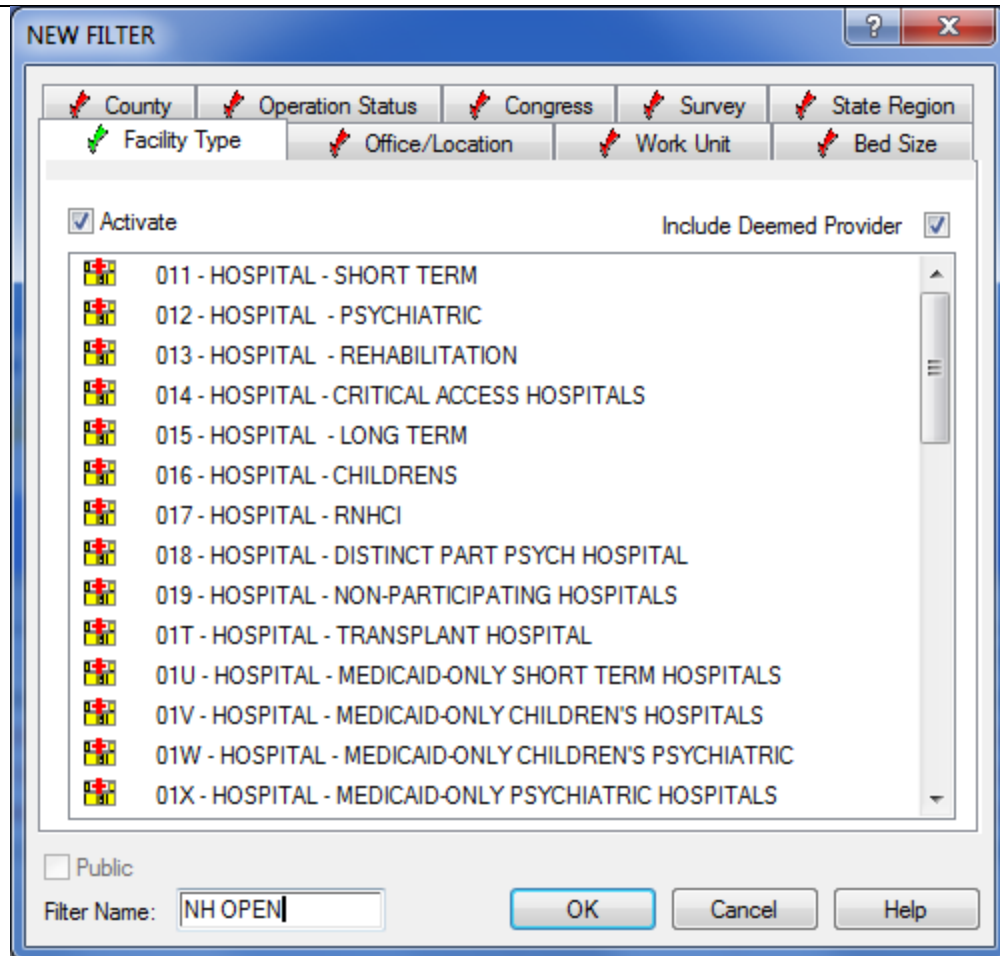


Figure 2: New Filter window, Facility Type tab

- In the Filter Name box, provide a name for your selection set: **NH OPEN.**
- On the Facility Type tab, put a checkmark next to Activate.
- Scroll down and select all the following federal nursing home types:
  - **021 – NURSING HOME (NH) – SNF/NF DUAL CERT**
  - **022 – NURSING HOME (NH) – SNF/NF DISTINCT PART**
  - **023 – NURSING HOME (NH) – SNF ONLY**
  - **024 – NURSING HOME (NH) – NH ONLY**
- Click **OK** to save your new selection set.

- Select the **Operating Status** tab.

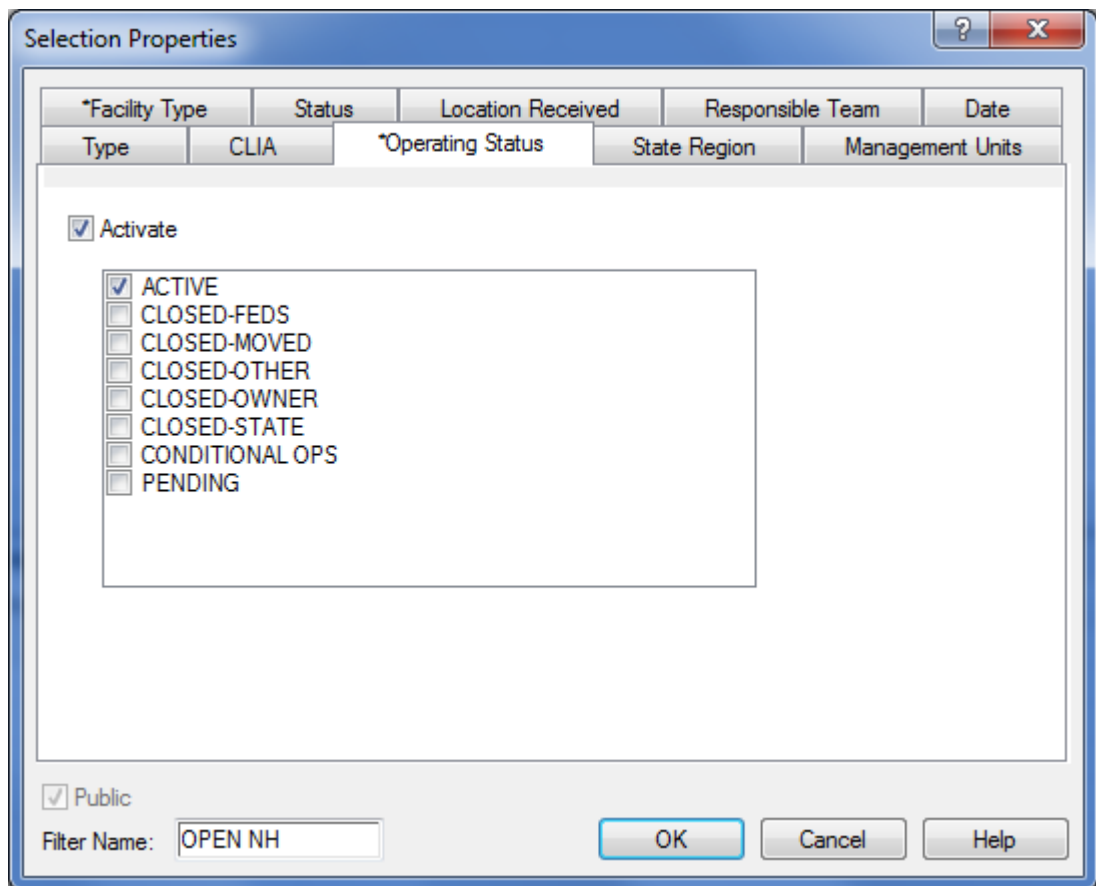


Figure 3: Operating Status tab

- Select **Activate**.
- Select **Active**.
- Click **OK**.

## 2 Activate selection set

- Click the + next to My Selections to expand the node.
- Locate and right-click your new selection set and select **Activate**.

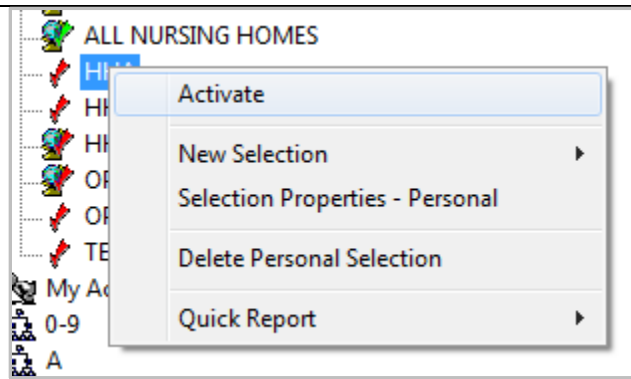


Figure 4: Activate menu option

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### 3 View your selection set

You now see only open nursing homes.

## Create Action Item Filters

Action Items automate the process of notifying agency personnel of actions assigned to them. For example, if you have been assigned to a survey team, or the RO or CO enters an RO Response on the Deemed tab and you are a Responsible SA, you are sent an action item message.

If you are an SA staff member, your action items are listed in Detail view when you log on to ACO. If you are an RO staff member, action items are displayed at startup only if you activated an action item filter in a previous session. The listed action items are for staff members specified in the active action item filter.

You can click the My Action Items node on the Alpha tab to display action items in List view during your ACO session. The list of action items is filtered by the Facility Type and State Region settings in your active Selection (My Selections) as well as the active Action Item filter, if any. Facility Type security applies to action items.

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### 1 Open action item filter window in AEM

- On the **Alpha** tab in the **Tree** view, right-click **My Action Items**.

## 2 Select New Action Filter

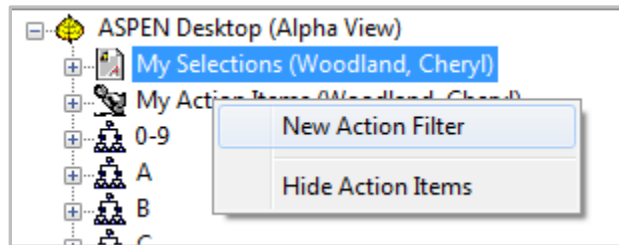


Figure 5: New Action Filter menu option

## 3 Specify Criteria

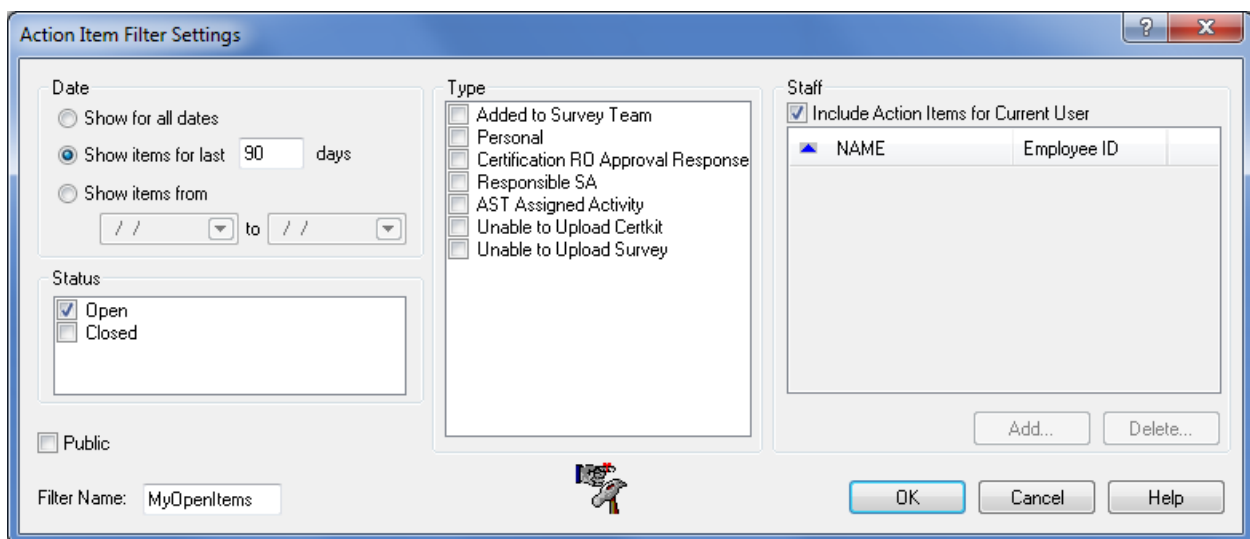


Figure 6: Action Item Filter Settings window

- Select show items for last, then enter **90** for days.
- In the Status section, select **Open**.
- For Type, don't select anything.  
With ASPEN filters, not selecting anything is the same as selecting everything.
- For Staff, put a checkmark next to **Include Action Items for Current User** (that would be you) to display only action items for the logged on user. To display action items for specific staff members, select Add, then search by name or employee IDs and add them to the Selected Items screen section.
- Answer **Yes** to the prompt.  
Do **not** select Public, as that would make the filter visible to all users in your region.

- For Filter Name, enter a descriptive name: **My OPEN ITEMS**.
- Click **OK** to save your new action item filter.

#### 4 Activate the filter

- In the tree, click the **+** to the left of My Action Items.
- Right-click your new filter and select **Activate**.

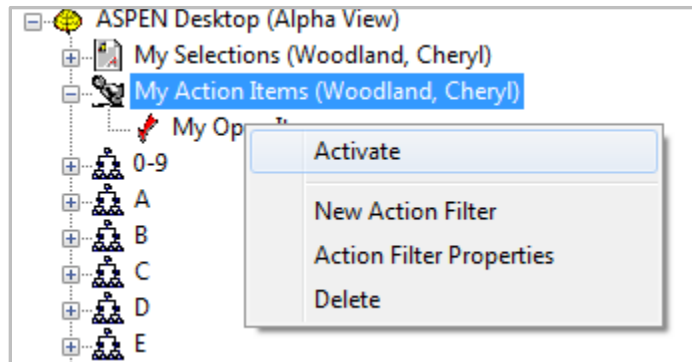


Figure 7: Activate menu option

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NOTE: Use the same process to create action item filters in ACTS.

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## Configure Action Item Emails

ASPEN includes an optional feature that provides for the delivery of specified system-generated action item notices via email to SA or RO recipients. To enable action item email notification, you must:

- Specify which types of action items will be delivered via email.
- Set up action item email delivery for each staff member who is to receive notices.

### Staff email configuration

- In **ACO**, go to the **Directory** tab.
- Expand the **Staff Directory** node.
- Expand the **0-9** node.
- Locate and right-click your staff member, select **Update Staff Member**.

- On the Employee Identification tab, make sure an E-mail Address is entered.
- Select the Email Settings tab:
  - Email Address is read only – populated from the Employee Identification tab.
  - Select **Receive Targeted Emails**.

Selecting Targeted or Broadcast emails checks all filters. You can deselect items for which you do not want to receive emails. Deselect All removes all filters for that section.

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NOTE: If an Action Item is checked on the employee Email Settings tab that is not checked in System Configuration | Email Configuration, emails will not be sent for this item.

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