

GUIDE TO:



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Suggestions

To provide input regarding the OPHI Public portal please use this link:

<https://fcss.wufoo.com/forms/montana-ophi-licensing-suggestion-box/>

Logging In

Login site: <https://montana.imagetrendlicense.com/lms/public/portal#/login>

There are a few different ways to log into the public portal, please read the following carefully to avoid the creation of duplicate accounts in the system.

The Public Portal automatically syncs data from the Montana Department of Labor and Industry database which means that if you are a licensed medical provider in Montana (Emergency Care Provider, RN, PA, MD) you already have an account (option 2). If you are not a licensed medical provider in Montana, you may need to create an account (option 4)

Option 1: If you are a returning user, and you have already claimed your account, enter your **Username** and **Password**. If you enter your password incorrectly 5 times your account will be locked out and you will need to contact the EMS office to unlock your account. Please use the forgot password option prior to locking out your account.

Option 2: If you currently hold a Montana EMS license, but you have not claimed your account, claim your account by performing the following:

1. Select Forgot Username link under the Login fields and above the Login and Create Account buttons.
2. Enter Date of Birth, Last Name and Social Security Number in the appropriate fields.
3. If the system locates your personnel record, you may be required to enter an email address.
4. An email is sent with additional instructions for setting up your password and will include your Username.

Option 3: If you have claimed your account, but you are not able to remember either your username or password, select either the **Forgot Username** or **Forgot Password** links under the Login fields. If you complete the forgot password process and have not received a reset email within 10 minutes (check your spam) it is likely that you do not have a current email on file. In this case, please use the forgot username link. If this is still not successful contact the EMS office for assistance.

Option 4: If you are applying as a compact nurse (not licensed in Montana) or as a trained driver, click the **Create Account** button. Enter your personal information when prompted. The email entered must be unique i.e. two users cannot have the same email address. An email will be sent with additional instructions for setting up your password and will include your Username. Once you have logged in you will be able to fill out an application under Applications > My Applications. Note: you will not be able to affiliate with an agency until you have completed one of these applications.

My Account

Dashboard

Once logged in, you will be taken to the Dashboard page which shows general information about your profile and applications. This section describes general features of this page.

The screenshot shows the Montana EMS & Trauma Systems eLicense and Agency Portal. At the top left is the logo for Montana EMS Online Prehospital Information System and MT OPHI-eLicense. The main header is green and contains navigation links: EMS & Trauma Systems, Board of Medical Examiners, NREMT, ImageTrend Elite, EMS Systems Rules, and EMS Licensing Rules. The user is logged in as NICHOLAS BURKLAND. The left-hand menu includes My Account, Dashboard, Profile, Documents, Certifications, Applications, Services, and Lookup. The main content area has a 'My Account' section with instructions and links for Profile, Documents, Applications, Services, and Lookup. Below this are two widgets: one for the user's license (Nicholas Burkland, Paramedic, MED-PARA-LIC-111736) and another for pending forms and applications. The footer contains copyright information and contact details for the EMS and Trauma Systems office.

- A. The header bar contains useful links relating to the EMS system in Montana. **Board of Medical Examiners** and **EMS Licensing Rules** relates to the licensing of individuals (EMT, Paramedic). Here you can look up providers' licenses, apply as a new provider, learn about EMS education, and medical director training. **EMS & Trauma Systems** and **EMS Systems Rules** relates to the licensing of agencies (ambulance service, fire dept.). Here you can find information regarding the requirements for different types of services, find forms for renewal applications, and information about the ImageTrend Elite ePCR system.
- B. The menu on the left-hand side allows you to navigate the site. See the sections below for more information about each menu option.
- C. The licensure widget shows information about your "primary" license (generally the one that applies to EMS). Clicking this will allow you to make changes to your account information.
- D. The applications widget shows information about applications that are in progress or require your review. Clicking either one will take you to the corresponding page.
- E. The contact information for the EMS Office can be found at the bottom of the page.

Profile

One of the most important things that you can do in the public portal is keep your contact information up to date. It is **your** responsibility to keep this information up to date. We send out important information via email on a regular basis and if your email is not up to date you may miss important reminders (like your license expiring). Please make every effort to keep this up to date.

To edit your contact information simply click your licensure widget on the dashboard (you can also click **Profile** under **My Account**). This will take you to the profile page where you can edit your contact information. You will notice that information such as your name, DOB, and SSN are not editable. This information is imported from the Department of Labor and Industry Database and must be updated by updating your medical license with them. (If you don't have a medical license contact the EMS Office)

Once you have completed updating all the fields simply click **Save** at the bottom of the screen to update your account.

If you need to reset your password you can also click the **Reset Password** button at the bottom of the screen.

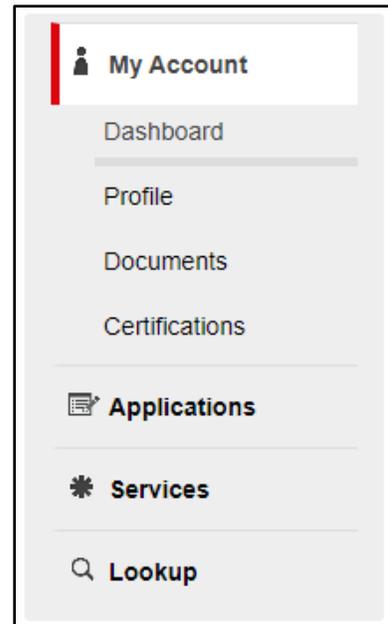
Documents

The documents page allows you to view all of the documents that you have ever uploaded or created in the system. (Note: the default display is 10 documents, you can change this to view more documents or click **Next/Previous** to move through each page) You can click the headers to sort them based on different field or search for a specific document. Clicking on the file name will allow you to view and download any of these files. This can be helpful when you need to upload documents that are already in the system into a different application.

Using the **Upload Document** button will allow you to upload new documents into the system. Enter a name for the document and a description if needed. You can then either click **Chose File** to browse for a file or drag and drop a file onto the **Chose File** button. The accepted file types are: BMP, CSS, DOC, DOCX, HTM, JPEG, JPG, MP4, MSG, ODT, PDF, PPT, PPTX, RTF, TIF, TXT, XLS, XLSX, ZIP, and XML. Then select a document type, this will affect whether the document is available to upload on future applications. Lastly, if applicable select a license to attach to. If this is a supporting document for a specific application choose that application if not leave it as "Attach to User Core Record". Once complete, click **Upload** to submit the document.

Certifications

The certifications page allows you to view all licenses and certifications that you have. The certification with the gold star is your "Primary Certification" which is the certification that will appear by default on



your account. If you notice errors in your certification details, or would like to change your primary certification, please contact the EMS Office.

Applications

The applications page allows you to manipulate information relating to your Certification, Services or Vehicles depending on your permissions. Depending on how many agencies you are affiliated with you applications page may appear in one of two different forms as shown below.

My Account

NICHOLAS BURKLAND | Logout

Available Applications

Click "Apply Now" next to one of the licenses to apply to that license for this service.

My Applications | **Services Applications**

Filter By Services: ALS Demo Agency (1211)

ALS Demo Agency (1211)
208, Antlers Park, Minnesota 55044
Advanced Life Support -- Issued: 10/02/2023 -- Expires: 12/28/2025

Applications

Service Information Update

Use this application to update the contact, demographic, and location information for your service.

Apply Now

My Account

NICHOLAS BURKLAND | Logout

Available Applications

Click "View My Applications" to view your personnel applications, or click one of the "View Service Applications" buttons to view the service licenses you can apply to for that service.

BURKLAND, NICHOLAS ROBERT (MED-PARA-LIC-111736)
Paramedic
Issue Date: 04/05/2022
Expiration Date: 03/31/2024

ALS Demo Agency (1211)
208, Antlers Park, Minnesota 55044
Advanced Life Support -- Issued: 10/02/2023 -- Expires: 12/28/2025

View My Applications

View Services Applications

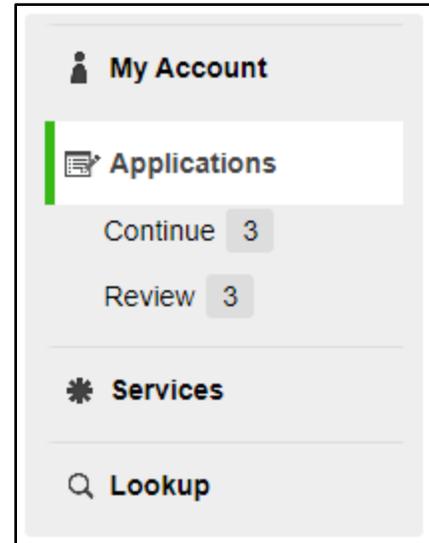
All personnel have permissions to complete applications for their own certifications under **My Applications**. These include Trained Driver and Compact Nurse Applications. Trained Driver refers to any member of an agency that does not hold a current medical license but has completed driver training in order to be able to drive an emergency vehicle in accordance with 50-6-322 MCA. This includes providers whose license has lapsed but they still wish to provide services as a driver. Compact Nurse refers to a nurse not licensed in the state of Montana who wishes to use their license to act as an ECP.

Users with the permissions of service manager or agency administrator are able to complete applications for the services they are affiliated with. To complete applications for a service click the name of the service or **Services Applications** and select the name of the service from the drop down. You will then be able to see all available applications for the service. (Note: certain applications can only be seen if certain conditions are met i.e. renewal applications are visible 6 months prior to renewal) Click **Apply Now** to the right of the application to start the process.

For more information on specific applications see **Appendix B: Service Applications**

Continue

The **Continue** menu option allows you to locate applications that have been started. The number next to the title indicates the number of applications that have been started but not issued yet. On the Continue Applications page you will see a list of all applications that have been started. Each section shows details about a specific application as well as the different forms attached to that application. Forms will appear in three different way: forms that have not been started will have a **Start** button, forms that have been started but not completed will show a **Continue** button, completed forms will show a PDF file of the completed form for review. You can use the search bar at the top of the scree to search for specific applications. There is currently no way to delete forms on the Portal.



Review

The review menu option allows you to review forms that have been assigned to you from other personnel. The most common form to appear here is the Medical Director Assurances Form. The number next to the title indicates the number of forms assigned that have not been completed. The filter at the top of the page defaults to Pending Medical Director. If you don't see the application you are looking for try changing the filter to view different application statuses. To complete the form select either the Start or Continue button.

A screenshot of the 'Review Applications' page. The page title is 'Review Applications' and the user is 'NICHOLAS BURKLAND | Logout'. Below the title is a message: 'The Continue button will be displayed for each form that you need to review.' Below that is a paragraph of instructions. A search bar is present with a dropdown menu set to 'Pending Medical Director' (highlighted with a red box) and a 'CLEAR' button. Below the search bar is a section for 'New Service Application' with details: Services: ALS Demo Agency, Status: Pending Medical Director, Number: 1211, Level(s): Advanced Life Support, Forms: 1 of 1 completed, Initiated On: Dec 3, 2023, Issue Date, and Expiration Date. Below this is a table of forms.

Form	Requested	Completed	Action
Initial Service Application (v2023)	Dec 3, 2023	Dec 3, 2023	View PDF

At the bottom right, there is a pagination control: 'Records 1-1 of 1 | First | Previous | Next | Last | Page 1 | Per Page 10 |'.

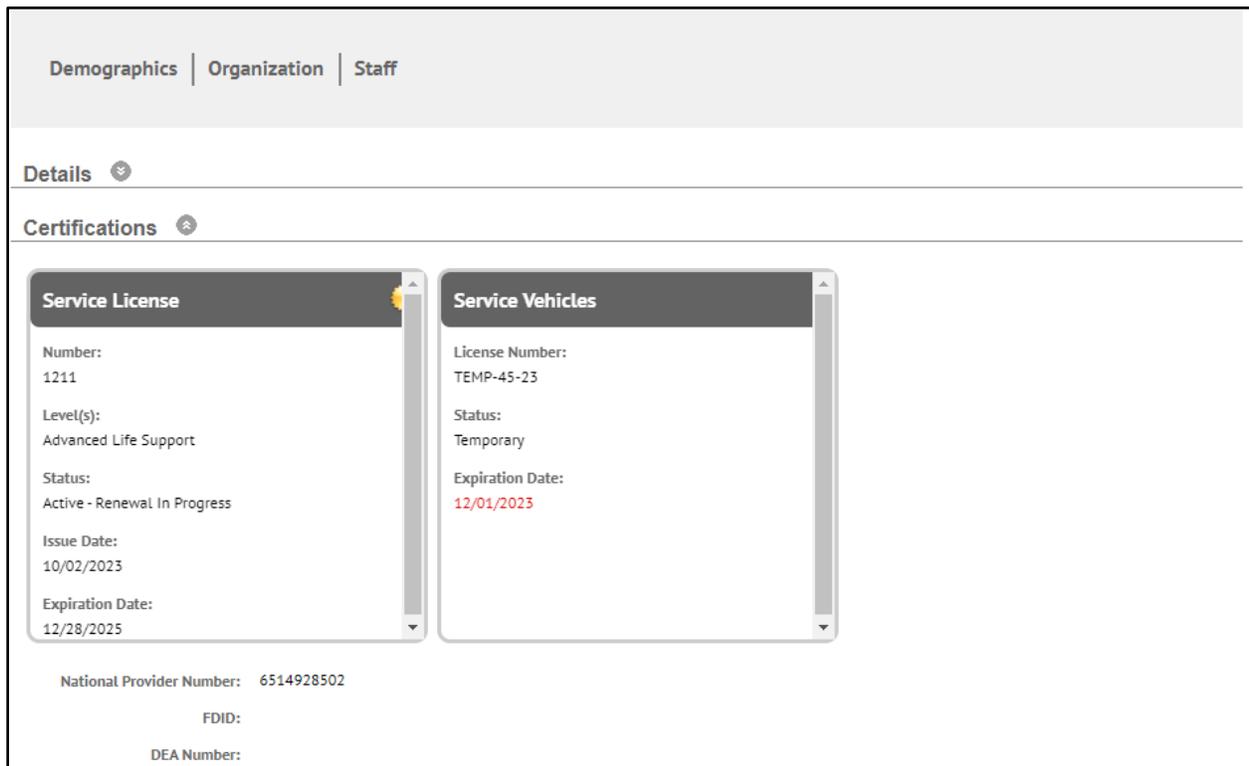
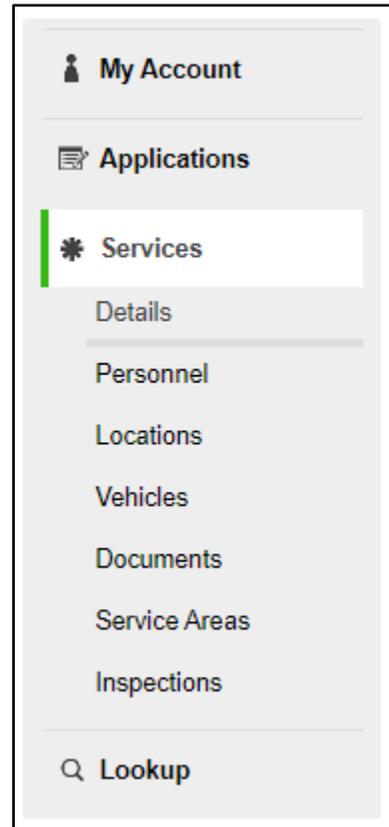
Services

The services menu allows all personnel to view the services that they are affiliated with and the positions they hold. For administrators (Service Manager, Agency Administrator, Operations Officer) the services menu allows you to view and change certain information about the agency you are affiliated with.

To view and change agency information from the Services page, click the name of the agency you wish to view. This will bring up multiple options underneath the Services Menu.

Details

This screen shows various information about the agency including contact information, licenses, statistics, and staff. Use **Demographics | Organization | Staff** at the top of the page to navigate through the information. None of the information on this page is directly editable. In order to update the agencies demographic information, use the Service Information Update Application (see **Appendix B**). **Certifications** represents the services current license level and when it will expire and cannot be changed. Information on the **Organization** and **Staff** pages cannot be changed. If you notice errors on this page, please contact the EMS Office to correct them.



Personnel

The personnel section allows you edit your agency's roster and changes are reflected in ImageTrend Elite. On the default view you will be able to see the first 10 providers in your agency as well as their position (see Appendix A) in the organization, license level, number, issue date, and expiration date. To see more providers at once change the view field at the bottom right of the screen. To view details about an individual provider, click the triangle to the left of their name. To view any documents associated with the user click the page icon to the right of the user's information. The books icon shows a report of their education but is not used by the state of Montana.

To add a new user simply search them by name, date of birth, or license number in the search box at the top of the screen. Select the user to be added from the available list and click **Add Existing Personnel to Agency**. If the user you want does not appear in the list, they may already be on your roster, double check using the search bar at the top of the list. Drivers must complete a Trained Driver Application before they will appear here. If you still can't find them there may have been an error in the system, please contact the EMS Office for further follow-up.

To delete a user from your roster, select the check box next to the provider(s) to be deleted. Then scroll to the bottom of the page and from the drop-down menu select **Remove Selected Users** and click **Go**. The users should be removed.

To change a user's position please use the Position Change Form (Appendix B). All changes made on this page will sync to ImageTrend Elite usually within 5-10 minutes.

Add an Existing Personnel to Services Roster

Personnel: Add Existing Personnel to ALS Demo Agency
Search by Personnel name or License number

- Position -

Personnel

GO
CLEAR

<input type="checkbox"/>	Name	Positions	Personnel ID	Show on EMS Run Form	Number	Level	Issued	Expiration	Status	Docs	Education Report
<input type="checkbox"/>	▼ BURKLAND, NICHOLAS ROBERT (MED-PARA-LIC-111736)			Yes	MED-PARA-LIC-111736	Paramedic	04/05/2022	03/31/2024	Active		
License Attributes											
Endorsements: Lead Instructor											
Profile	Positions	Email	Home	Cell	Work	Address					
Default		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]					

Select I Want To Go

Records 1-1 of 1 | [First](#) | [Previous](#) | [Next](#) | [Last](#) | Per Page 10

= Service Manager
 = Agency Administrator
 = Medical Director
 = Provider
 = Trained Driver

 = Primary QI Contact
 = Infection Control Officer
 = Pediatric Coordinator
 = Operations Officer
 = Inactive User

Locations

Locations allows you to view the different stations on file for your agency. Clicking on any station name will provide you with additional details about the station. To edit this information please use the Service Information Update Form.

Vehicles

This page allows you to view a roster of the vehicles currently attached to your service. Clicking on the VIN number will display additional details about each vehicle. To edit this information please use the Add Vehicle Application, Edit Vehicle Form, or Delete Vehicle Form.

Documents

Documents allows you to see and download any documents that have been associated with your agency. Use the filters and search bar at the top of the list to search for specific documents. Click the document title to view or download the file (depends to the file type). To upload a new document please use the **Upload a Document** button under My Account > Documents or upload it directly to the applicable application. Documents cannot be removed.

Service Areas

This page shows all of the services areas that you have identified as being part of your primary response area. Clicking each service area will provide additional details. To add, edit, or delete service areas please use the Service Information Update Form.

Inspections

This page shows records of all the service and vehicle inspections that have been completed for your agency. Use the search bar and filter at the top of the list to search for a specific inspection. Click the PDF icon to the left of each record to view a copy of the inspection checklist.

Appendix A: Position Descriptions

<u>POSITION</u>	<u>SERVICE PERMISSIONS</u>	
<u>Medical Director</u> Oversees the medical care provided by an ALS agency (Ref: ARM 37.104.505, 50-6-302). Ensures that care provided conforms to the Montana ECP Practice Guidelines and ensures the service is operated in a manner that does not threaten or endanger the public health, safety, or welfare.	Applications: Limited	Roster: No
<u>Service Manager</u> The individual who is responsible for ensuring service operations are conducted in compliance with all applicable statutory and regulatory requirements (Ref: ARM 37.104.504). This is the primary point of contact for the EMS office. Limited to one per service.	Applications: All	Roster: Yes
<u>Agency Administrator</u> Has the same permissions as the service manager but is not necessarily responsible for regulatory compliance. Serves as a secondary contact for the EMS office.	Applications: All	Roster: Yes
<u>Operations Officer</u> Has limited permissions to manage the roster and view service information/documents but does not have permission to complete applications.	Applications: No	Roster: Yes
<u>Provider</u> A medically licensed care provider (EMR, EMT, AEMT, Paramedic, RN, etc.) that does not have any other duties. (Ref: 50-6-202(2) MCA)	Applications: No	Roster: No
<u>Trained Driver</u> A non-licensed member of the agency that has completed training in the operation of emergency vehicles. (Ref: 50-6-322 MCA)	Applications: No	Roster: No
<u>Pediatric Coordinator (PECC)</u> The main point of contact for the EMS for Children Program. Maintains records relating to pediatric care and training. (contact Kelly Little: kelly.little@mt.gov)	Applications: No	Roster: No
<u>Primary QA Contact</u> The main point of contact for agencies participating in the Time Sensitive Injury & Illness Recognition Program. (contact Janet Trethewey: jtretthewey@mt.gov)	Applications: No	Roster: No
<u>Infection Control Officer</u> Point of contact for infectious disease and body fluid exposure incidents. If not filled, this duty falls to the service manager. (Ref: 50-16-701(3) MCA)	Applications: No	Roster: No

References:

- **ARM 37.104.504** Service Manager Duties
- **ARM 37.104.505** Medical Director Duties
- **50-6-2 MCA** Emergency Care Providers
- **50-6-3 MCA** Ambulance Service Licensing
- **50-16-7 MCA** Report of Exposure to Infectious Disease

Appendix B: Service Applications

For personnel with administrator level permissions the applications on the Services Applications page allow the user to change information about the service as well as its personnel and vehicles. The applications fall into two categories: **Forms** deal with simple changes to the agency and do not require any approval from the EMS office, once they are submitted the changes go into effect immediately. **Applications** on the other hand generally deal with more complex changes and require approval from the EMS Office before changes take effect.

If you are not sure which application you need, please don't just start filling out random applications, this makes a giant mess in the system. Contact the EMS Office for guidance.

SERVICES APPLICATIONS

Refer to ARM 37.104.510 for specific rules regarding licensing. The important points are:

- Applications must be completed online, there is not a paper option.
- Once started, you have 30 business days to complete the application or it will be denied and you will have to start over.
- Once your application is completely submitted the EMS Office has 30 days to approve, deny or request more information. After that the application is automatically issued.
- New equipment (service or vehicle) requires an in-person inspection before it can be used. If you don't have an official permit, temporary or permanent, that means you cannot operate that service/vehicle.
- If any information changes (email, phone, address, personnel, medical director, service manager, etc.) you have 10 days to notify the EMS Office. If you don't keep your information up to date, it's not our fault that you don't get important notices.

New Service Application

This application allows you to apply for new EMS service license and must be assigned by a system administrator. If you would like to complete a New Service Application, please contact the EMS Office to get started. You may not operate an EMS service until you have a physical or digital copy of you EMS license.

Service Renewal Application

This application only appears 6 months prior to when you are due to renew your service license. It consists of two parts, an inspection, and a \$35 renewal fee. It is due 15 days prior to the expiration of your current license (December 16th).

After Clicking **Apply Now**, you will be taken to the service manager portion (Renewal Information). On the first page much of the information is not editable, review this information and contact the EMS office if any corrections or modifications are needed. Update the rest of the information as needed. This application will request different documents based on the type of service the application is being completed for (Air, Ground, Non-transport). See the FAQ for questions about service area and uploading documents.

Your medical director will also have to complete a portion of the application through their own account on the public portal. It can be found under Applications > Review > Service Renewal Application (Medical Director Assurances). They must certify that they are willing to supervise the service at a specific licensure level (ALS, BLS, BLS w/ ALS). They should get an automatic email notifying them that there is an application pending but often times they may require a reminder. For issues logging in, refer to the “Logging In” section of this guide.

Service Information Update Form

This form allows you to update the information for your service, including contact information, address, service area, etc. It can be used to update information that changes in the period between renewal applications (within 10 days). This is NOT a renewal application.

Medical Director Assurances Update

This form is visible only to medical directors and can be used to update their information or the level of care that they are willing to supervise. This is NOT the Medical Director Assurances Form that is used for renewal applications.

PERSONNEL APPLICATIONS

Position Change Form

The position change form can be used to update the positions of personnel already on your roster. To add or remove personnel, refer to the Personnel section earlier in this guide.

After opening the form click the edit button to the left of each person’s name to edit their position, then click **Done** to save the changes.

Service managers and medical directors will not appear in the main list of personnel. Changes to these positions must be approved by the EMS Office before they can take effect. In order to change service manager or medical director select the appropriate check box at

the bottom of the screen. Once selected a text box will appear. Type the name of the new service manager or medical director in the appropriate box. As there can only be one per service, entering a name here will replace the existing service manager or medical director.

Once complete, click **Submit** at the bottom of the application. If you have requested a service manager or medical director change the application will remain pending until approved, otherwise changes should go into effect immediately.

VEHICLE APPLICATIONS

New Vehicle Application

This application will allow you to add a new vehicle to your service. We only track primary EMS vehicles, please do not enter other fire vehicles, personal vehicles, or other vehicles. If you want vehicles to appear in the ImageTrend Elite ePCR they must be entered here.

After opening the application, you must first select which type of vehicle you want to add. Based on this selection, the form will ask for the appropriate information. Once this is complete, select “Add record to the service” for **Action to Take** and then click the small green + button to the right of the **Vehicle** field. This will open fields to record the required information for the new vehicle.

The subsequent pages will ask questions about the equipment that is carried. Once the application is signed and submitted, the EMS Office has the option to issue a temporary permit if they feel it is appropriate. This will come in the form of an email attachment. You may not use the vehicle until you have received this permit.

The final step is an in-person inspection of a vehicle. The EMS Office will reach out to schedule this. Once passed, you will receive a permit in the form of a sticker that is placed on the vehicle.

If the vehicle you are trying to add is already in the system (purchased from another Montana agency) then you will likely receive an error saying that VIN number already exists in the system. If this happens please contact the EMS Office to attach the vehicle to your roster.

Edit Vehicle Form

The edit vehicle form allows you to make changes to vehicles that have already been added to your roster. Click the blue edit button to the left of each vehicle to edit the details. All information can be changed except year, make, model, and VIN. If you notice errors in these fields please contact the EMS Office to make corrections. After submitting this form changes should appear immediately in your vehicle roster and within 5-10 minutes on ImageTrend Elite.

Remove Vehicle Form

This form allows you to remove vehicles from your roster. Click the edit button to the left of each vehicle’s VIN number and then scroll to the bottom of the vehicle information and click **Remove** to delete the vehicle. Once you click remove, the vehicle cannot be re-added so please double check before clicking. Once you are done, click **Submit** at the bottom of the screen.

Appendix C: Frequently Asked Questions

I am locked out of my account/How do I log in?

Please refer to page 1: Logging In

How do I upload a document into an application?

Start by clicking  Once the Upload file dialog box appears you have three options:

- **Uploaded Document** will allow you to select a previously uploaded document of the same file type that was used on a previous application. Select the available document from the drop down and click **Save**. Not all file uploads will have this option.
- **New File** allows you to add a new document. Click **Choose File** and browse to the correct document, click **Select**, and then **Save**.
- You can also drag and drop a file onto the **Choose File** button and then click **Save**

Once you have saved your document make sure to select the correct **Document Type** so that the document can be filed correctly for use on future applications.

How do I generate a service area XML file?

Visit <https://nemsis.org/media/ServiceAreaBuilder/> select the area on the map that represents your primary service area using the **Draw** tool. Then verify that you have the correct areas selected on the left hand panel. If the area is correct, click Download and then upload the resulting XML file into the appropriate location on your application.

How do I add a trained driver?

This cannot be completed by the service manager. The person applying for the position must do so through their own account. Start on page 1: Logging In – Option #4 to create an account. Once the account is created, they need to go to Applications where they can complete a Trained Driver Application. Once complete they will appear in the personnel roster lookup. Once added, please make sure to assign them to the role of Trained Driver using the Position Change Form.

Glossary

ARM – Administrative Rules of Montana

ECP – Emergency Care Provider

License – refers to the digital or paper license which allows a service to operate as a licensed EMS service.

MCA - Montana Code Annotated

Permit – refers to the temporary permit or sticker that authorizes a vehicle to operate as a licensed EMS vehicle.

Service – refers to the ambulance company, fire department, or other organization that provides EMS services. Used synonymously with “Agency.”