

Allscripts Patient Flow 22.1

Bed Management User Guide

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Chapter 1

Allscripts Patient Flow and the Bed Management module

The Bed Management module of the Allscripts Patient Flow[™] application provides the ability to efficiently manage the movement of patients through the care delivery process, including different facility locations.

Bed Management enables better monitoring of the patient placement process and provides you up-to-date information about Allscripts Patient Flow[™] and bed capacity, which reduces bed placement time. The module provides information about bed availability, patient activities, and detailed patient information.

Allscripts Patient Flow[™] is a browser-based tool that works best with Use Microsoft[®] Internet Explorer[®].

Areas that you can access in Bed Management vary depend on your assigned roles. Types of roles include:

- > Allscripts Admin
- > System Admin
- > Transport Dispatcher
- > Housekeeper
- > Transporter

Note: For best viewing of the Allscripts Patient $\operatorname{Flow}^{\mathbb{M}}$ page, set your web browser to Full Window mode and your window resolution to a minimum of 1024 x 768.

Log in to Allscripts Patient Flow

To log on to Allscripts Patient Flow[™], enter your login credentials on the **Allscripts Patient Flow** window.

Before you begin

Verify that you have a valid username and password to access Allscripts Patient Flow[™].

If your hospital uses Windows[®] Authentication as the security method for logging in, you do not need this procedure to log on to Allscripts Patient Flow[™]. When you log on to your hospital's



computer network and open the Allscripts Patient Flow[™] application, you are logged on to Allscripts Patient Flow[™] automatically with your default roles and organizations.

1. To access the login page, go to

Alls	cripts	K	
Pati	ent Flow		
Please Login Enter your Us	ername and Password below.		
Username Password			
✓ Use Default Se	ession		
Login			
Copyright © 2	020 Allscripts Healthcare Solutions, Ii	nc. Read More	🛞 Allscripts

- 2. For Username, enter your assigned username and press Tab.
- 3. For **Password**, enter your case-sensitive password and press **Tab**.
- 4. For Use Default Session, complete one of the following actions:
 - To use the default session with your stored user settings, select Use Default Session and then click Login or press Enter.
 You are logged in, checked in, and the Allscripts Patient Flow[™] application displays the splash page.
 - To bypass the default session and change your user settings, clear Use Default Session and then click Login or press ENTER on your keyboard. The Check In window is displayed, where you can update your information. For example, if you have multiple roles or have access to multiple organizations, to simplify the display of

if you have multiple roles or have access to multiple organizations, to simplify the display of information and messages received, choose a specific role and organization. You can also select a checkout time.



Log out of Allscripts Patient Flow

For security reasons log out of Allscripts Patient Flow[™] whenever you take a break or leave your computer. Logging out of Allscripts Patient Flow[™] is not the same as checking out of it.

To log out, click Logout at the top of the page. The message, You have successfully logged off displays, and you are logged out of Allscripts Patient Flow[™].

To maximize patient safety and minimize security risks, Allscripts Patient Flow[™] automatically logs you out after a specified number of minutes of inactivity. After that time has elapsed, a window displays, where you must enter your password. If you do not enter a password, a 30-second countdown begins. If you do not enter a password in 30 seconds, all Allscripts Patient Flow[™] windows close and the session ends.

Note: Contact the Allscripts[®] implementation or Allscripts[®] support team to assist with setting up this automatic feature. The countdown interval and activation of this feature is modified through **Application Preferences**.

Check in to Allscripts Patient Flow

Use the **Check In** window to change the roles or organizations that you use by default in Allscripts Patient Flow[™], define your access to various pages and functions, or to specify the types of messages that you want to receive (for example, messages that relate to Allscripts Patient Flow[™] and your assigned role).

Before you begin

Verify that you have a valid username and password to access Allscripts Patient Flow[™].

This procedure assumes that you are set up with more than one role or organization in Allscripts Patient Flow^T).

- 1. Access the Allscripts Patient Flow login page.
- 2. Enter your username and password.
- 3. Clear Use Default Session and click Login.

The Check In window is displayed.



My Information	
User Name User ID	
Checkout Time	7/29/2020 23:54 🔟 🙆
My Assignment	
Roles	* Allscripts Admin, System Admin
Organizations	* University Hospital, Childrens Hospital, Comm
My Messages	
🗆 Email	[Select]
🗹 In Box	
Page	[Select]
Messages	Standard 🗸
	Update Check Out Cancel

- **4.** To select your assigned roles to use in Allscripts Patient Flow[™], complete these steps:
 - a. Expand the Roles list.
 - b. Select or clear any roles in the list.
 - c. Click outside the field.

Your selected roles are displayed in the **Roles** field, and the **Organizations** list becomes available.

- 5. To select your assigned Allscripts Patient Flow[™] organizations in which to complete activities, complete these steps:
 - a. Expand the Organizations list.
 - **b.** Select or clear any organizations in the list.
 - c. Click outside the field.

Your selected organizations are displayed in the **Organizations** field.

Also, **My Messages** becomes available. By default, **In Box** is selected, which specifies that any messages sent to you by way of Allscripts Patient Flow^T go to the **In Box**.



Check in to Allscripts Patient Flow

- 6. (Optional) To use additional message delivery methods (email or pager), select the following options under **My Messages**:
 - To specify that messages are delivered by email, select Email and select an email address from the list.
 - To specify that messages are delivered by pager, select Page and select a pager number from the list.

Your selected email address or pager number displays in the corresponding field.

7. To specify the types of messages to receive, expand **Messages** and select any available options.

By default, **Standard** is selected and cannot be cleared. However, you can select **Alert** or **Escalation** message types.

Along with **Standard**, your selected message types display in the **Messages** field.

8. To check into Allscripts Patient Flow[™], click **Check In**.

You are checked in and the Allscripts Patient Flow[™] application opens on the splash page.



Check out of Allscripts Patient Flow

For security reasons, check out of your Allscripts Patient Flow[™] session at the end of your workday. When you check out of your session, you are also logged out of the application.

To use Allscripts Patient Flow[™] with different settings than your default settings (for example, a different authorization role), check out of your session.

- 1. From Allscripts Patient Flow, complete one of the actions:
 - > Click your name hyperlink at the top of the page.



- > From Account Settings, click Check Out.
- 2. (Optional) If applicable, use the 🕮 and 🖾 to update the check out date or time, and then click Update.
- 3. Click Check Out.

Account Settings

Use the **Account Settings** section to check out of a session or subscribe to messages.

To access options related to your Allscripts Patient Flow[™] account, click **Account Settings** in the left navigation pane. The available options are based on your assigned system roles and authorizations.

Account Settings
Check Out
Message Subscription
Bed Management
Care Visibility
Bed Turnover
Transport
Transfer Center
Reports
Account Settings



Account Settings

Check out or update check out times

Check out of your current Allscripts Patient Flow[™] session or update the time to check out.

Use the **Check Out** window to check out of a session or update the message settings for your current Allscripts Patient Flow[™] session.

Check Out looks similar to the **Check In** window, which displays when you first log on to Allscripts Patient Flow^M. To change your roles or organizations in Allscripts Patient Flow^M, you must first check out of your current session on **Check Out**.

- From the left navigation pane, click Account Settings > Check Out. Check Out opens.
- To change the date and time to check out of the session, complete these steps for Checkout Time.
 - a. Click 💷 and select a new date.
 - b. Click 🖾 and select a new time.
 - c. Click Update.

The updated date or time are displayed in **Checkout Time**.

3. To check out immediately and close the window, click **Check Out**.

You are checked out of the session and logged out of Allscripts Patient Flow[™]. Also, You have successfully logged off is displayed.

Change message settings

On the **Check Out** window, update your message settings.

- 1. Select Account Settings > Check Out on the left navigation pane.
- Check Out opens.
- To add message delivery methods such as Email or Page, complete the following steps in the My Messages section.
 - a. Select the box next to any message delivery method.
 - b. For each selected method, select an option (for example, an email address or pager number). The selected option displays in Messages. Standard by default, which enables you to receive standard Allscripts Patient Flow[™] messages. You cannot change this value.



3. To subscribe to additional message types such as **Alert** or **Escalation**, click **Messages** and select other options.

When selected, Alert or Escalation displays in addition to Standard Messages.

4. Click Update.

Check Out refreshes, and the message settings are updated.

Allscripts Patient Flow sections

Use the sections on the Allscripts Patient Flow[™] page to navigate the Bed Management module.

Left navigation pane

Click **Bed Management** in the left navigation pane to access and manage the Bed Management module in Allscripts Patient Flow[™].

The left navigation pane displays buttons for Allscripts Patient Flow[™] modules and functions. The name of the module and function and its associated icon displays on the button. When you click a specific button, various options for that module or function.

For example, when you click **Bed Management**, the various pages associated with that module display, such as **Pre-Admissions Worklist** and **Bed Management Worklist**. The following figure displays buttons for all Allscripts Patient Flow[™] modules, but only the modules that your organization purchased are displayed to you.

Bed Management
Care Visibility
Bed Turnover
Transport
Transfer Center
Reports
Account Settings



Messages section

When the left navigation pane is in the expanded view, the **Messages** window is displayed. The window displays messages that were sent to you automatically (application generated messages) or manually by an Allscripts Patient Flow[™] user.

The total number of messages is displayed in **Inbox** (for example, <u>2 Inbox</u>). Also, the messages are displayed in a list, as demonstrated in the following image.



Bed Management functions

The Bed Management module has eight main functions that display as options in the left navigation pane.

These options are:

- > Portal View
- > Unit View
- > Pre-Admissions Worklist
- > Bed Management Worklist
- > Bed Board
- > Floor Plan
- > Admissions Worklist
- > Closed Bed Worklist

When you click an option in the left navigation pane, the function displays the associated page on the right side.



Bed Management
Portal View
Unit View
Pre-Admissions Worklist
Bed Management Worklist
Bed Board
Floor Plan
Admissions Worklist
Closed Bed Worklist
Bed Management

The Floor Plan and Bed Board functions provide information in a graphical format.

Action buttons

Use the action buttons as shortcuts to specific tasks. For example, start a transport request, locate a patient, or display a floor plan.

Action button	Functionality
🔥 Transport Request	Opens the Transport Request page. This button displays on all Bed Management pages, if your hospital also has the Transport module. The display of this button is also dependent on your authorizations.
Patient Locator	Opens the Patient Locator page, where you can search for a patient across all Worklist and View pages by first name, last name, gender, Medical Record Number (MRN), or case number. This button displays on all Bed Management pages.



Allscripts Patient Flow sections

Action button	Functionality
Q	Opens a Search page, where you can search for patients by last name or MRN on that specific page only. If an item matching the search criteria is found, the page displays only the matching rows. If no items are found, No Results displays.
Ç.	If search results are found, is replaced by . Click this icon to clear the search filter criteria and display all information.
<u>ک</u>	Refreshes the information on the page.
	Displays a Filters window, where you can define criteria to filter the patient information displayed on the page. The filter icon is available only on a user-created tab. If you are on the All tab, the icon is unavailable and displayed as T .
	Opens Direct Admit , where you can create a direct admission for a patient.
	Exports the data on the page to a different format, such as a Microsoft [®] Excel [®] spreadsheet.
	Displays the Floor Plan for a selected facility, unit, or pod. This icon is available on the Unit View page.
Ð	Displays the Unit View . This icon is available from the Floor Plan page.
Patient Details	Opens Patient Details , where you can view or manage details for the selected patient. The button displays on most worklists, views, or the Admissions Worklist page.



Action button	Functionality
6	Displays limited details about the patient (for example, the patient's care service, care level, attributes, or needs).
*	Expands a list. For example, the organization list is expanded to display the organization name with a hierarchy of associated facilities, units, or pods.
[*]	Collapses a list. For example, the organization list is collapsed to display only the organization name. Associated facilities, units, or pods are hidden.

Select organizations facilities, units, or pods

Use the organization list to choose the facility, unit, or pod to which you are authorized access, and to display patient data for those organizations on the associated worklists or pages.

On most main pages, the organization list is on the top left of the page. If you are authorized to access only one facility, unit, or pod, then the information is displayed automatically in the organization list. If you are authorized to access multiple organizations, select facilities, units, or pods (based on your authorizations) in the list by following the steps below, which use the **Closed Bed Worklist** as an example.

The options on the organization list vary slightly on the Bed Management pages. Some main pages enable you to select multiple organizations at the same time. Others, like the **Unit View** and **Floor Plan** pages, only enable you to select one facility and unit.

Note: The following steps demonstrate all the different types of workflows available on the various Allscripts Patient Flow[™] pages or worklists.

1. With Allscripts Patient Flow[™] page or worklist open, click the down arrow next to the organization list.

CHD/HEM/ONC,	CHD/MICU	-
--------------	----------	---

The organization's facilities that you are authorized to access might be displayed in a hierarchy list of organization, facility, unit or pod. An asterisk (*) indicates the locations that you are checked into and selected locations are displayed with a check mark. If an organization check box is displayed in black, there are some facilities, pods, or units in the organization that are not selected.



Allscripts Patient Flow sections



- 2. Do one of the following:
 - To expand the organization list and display all facilities, pods, or units in the organization hierarchy, click (expand all option).

Expanding the organization list can take some time if there are many organizations to display. The arrows next to the facilities and units point down, which indicates an expanded list.

The explored on Portal View, Unit View, Bed Management Worklist, Bed Board, Floor Plan, and Closed Bed Worklist.

- > To collapse the organization list and display only the organization name, click (collapse all option).
- > To select all organizations with facilities, pods, or units in a single action, click
- > To clear all organizations with selected facilities, pods, or units in a single action, click
- To select a specific organization, click the check box next to the organization name. All facilities, pods, and units under that organization are automatically selected.
- To deselect a specific organization and its facilities, pods, or units, click the selected organization box. All facilities, pods, and units under that organization are automatically deselected.

The select or deselect options are available on **Pre-Admissions Worklist**, **Bed Management Worklist**, **Bed Board**, and **Closed Bed Worklist**.



- 3. To change the organization's facility, unit, or pod selections, complete any of the following steps.
 - a. To select a different facility, click the arrow to expand the organization hierarchy.
 - **b.** Select the box next to any facility.
 - c. To deselect a facility and any of its selected units or pod, clear the box.
 - a. To select other units in the same facility, click the arrow to expand the facility hierarchy.
 - **b.** Select the box next to multiple units.

A check mark displays next to the newly selected units.

- c. To deselect units along with any selected pods, click the box to remove the check mark.
- **a.** To change pod selections in the same unit, click the arrow to expand the unit hierarchy and do one of the following:
 - > To select different pods, click the box to add a check mark.
 - > To clear selected pods, click the box to remove the check mark.

After your updates, a red border displays around the organization list, which indicates that changes were made.

4. To refresh the worklist and close the organization list, click

The refresh option is available on **Pre-Admissions Worklist**, **Bed Management Worklist**, **Floor Plan**, and **Closed Bed Worklist**.

The organization list closes, and the red border around the box is removed. The associated worklist or page is updated with your organization selections.

Patient lists

Use the various patient lists in the Bed Management module to view or take action on patient beds.

Each column's heading on the list indicates the type of information in that column. However, the column headings vary according to the worklist that you select. Except for the **Admissions Worklist**, all worklist and view pages are displayed with three columns of information.

For example, **Bed Management Worklist** has a **Location**, **Request Information**, and **Assignment** column.



Allscripts Patient Flow sections

Bed Management Worklist			
CHD, COM, UNV	•		Q. C 🝸 👪 🗹
IA 🖸			
Location	Request Information	Assignment	
ED 76MO AD OPEN 16H UNV	F - 47y 11/21/1972 MRN 7 Dx Fever, Cough, r/o TB	Dr. KYUA. Find Bed Critical Care (CCEE) Find Bed ETA 9/3 19:08	More Suggestions ₫ Notes ♀ Edit ● Cancel
ED 76MO AD OPEN 16H UNV	F - 38y 5/4/1982 MRN Dx Anemia	Dr. THUY Critical Care (LCKE) S. Find Bed ETA 9/3 19:00	More Suggestions
ED 76MO AD OPEN 16H UNV	N - 66y 5/27/1954 MRN Dx R/O Brain Aneurysm	Critical Care (CCRE) ETA 9/3 19:08	More Suggestions
CARD 76MO T OPEN 16H UNV-CARD-1141-01	F - 90y 12/29/1929 MRN D Dx Chest Pain	Cardiology (STDN) ETA 9/3 19:10	More Suggestions
CCU 76MO T OPEN 16H UNV-CCU-1102-01	© M - 69y 11/4/1950 MRN : Dx Symptomatic SVT	Cardiology (STDN) UNV/ICCU/1126-01 ETA 9/3 19:10 UNV/ICCU/1133-01	83% 🚦 83% 🚦 More Suggestions
			🞯 Notes 🔍 Edit 🌑 Compare 🧧 Cancel

The **Location** column contains patient tiles, which indicate location of units or pods with beds along with bed statuses.

The **Request Information** column displays information such as the patient's name, age, gender, Medical Record Number (MRN) or diagnosis (Dx).

The **Assignment** column displays bed placement information such as the assigned provider, suggested beds with the bed status, or notes. Find a bed, view bed details, or assign a bed from the suggestions.

Scroll bar for multiple records

If the information records are too numerous to display on a worklist or page, use the vertical scroll bar that displays on the right of the page. Click and drag the scroll bar up or down to find a specific record.

Page navigation bar

On **Pre-Admissions Worklist**, **Bed Management Worklist**, and **Closed Bed Worklist**, the rows of information are usually too numerous to display on one page, and the list of rows display across multiple pages. Use the page bar at the bottom of the page to view the page numbers and rows, or click the arrows to navigate to pages.

Click to go to the next page, or click to go to the last page.

Click sto go to the previous page, or click sto go to the first page.



If there are no previous or next pages, the arrows are not available. For example, the following figure demonstrates that there are no previous pages because you are on the first page.



Unit View-activity pane

Use the activity pane on **Unit View** to view activity requests for a selected unit or pod (for example, required actions, pending arrivals, intra-unit activities, or waiting Admission, Discharge, Transfer (ADT) activities).

Action Required (0)		
Pending Arrival (0)		
Intra-Unit Activity (0)	¥	
Waiting ADT Activity (2)	*	
DC 1241-02 ;, Ezra	WADT	
DC 1242-01 . s, Jaquelyn	WADT	

View or take action on pending activity details for each patient in the **Pending Activity** column on **Unit View**.



Allscripts Patient Flow sections

Pending Activity			
Dr. / . CARD (MDSG) ETA Tx 9/3 22:40	⊤⊗ ∎†	Unassigned	
Dr. २ CARD (MDSG)	(TP) []*	TP TX	12H 🖨
Dr. CARD (MDSG) ETA DC 9/3 23:59	R 📑 0:26	TP TX	12H 🖨





Chapter 2 Bed Management module

The Bed Management module is a browser-based tool, which enables you to efficiently manage movement of patients through a facility. This module provides better monitoring of patient placement, displays up-to-date information about Allscripts Patient Flow[™] and bed capacity, and reduces bed placement time. View information such as bed availability, patient admissions, transfers, and detailed patient information.

Note: Use $Microsoft^{\mathbb{B}}$ Internet Explorer[®] as your preferred browser for the Allscripts Patient Flow^M application.

Access the Bed Management module

To access the Bed Management module, click **Bed Management** on the left navigation pane of Allscripts Patient Flow[™].

Depending on your assigned roles, use any of the views or worklists listed under Bed Management.

Bed Management	X
Portal View	
Unit View	
Pre-Admissions Worklist	
Bed Management Worklist	
Bed Board	
Floor Plan	
Admissions Worklist	
Closed Bed Worklist	



Chapter 2 Bed Management module

Bed Management views and worklists

The Bed Management module has two views and four worklist panels. You might have access to one, several, or all panels, but you can only view the panels for which you have permission to access. Click a view or worklist option to display the associated panel.

View or worklist	Description
Portal View	Use this view to create requests or to view the status of each request. Requests include:
	> Direct Admit> Admission> Discharge
Unit View	Use this view to create requests or to view the status of each request and bed. Requests include:
	 > Discharge > Bed Swap > Change Room or Bed > Bed Cleaning
	If necessary, use the Unit view to respond to bed placement requests. A Floor Plan view of beds and rooms is available.
Pre-Admissions Worklist	Use this worklist to:
	 > View Pre-Admissions Requests. > Edit and resubmit the requests. > View the request status.

Table 1: View or worklist descriptions



Bed Management views and worklists

View or worklist	Description
Bed Management Worklist	Use this worklist to:
	 > Create Direct Admit requests. > Find a bed. > Reserve a bed. > Cancel or reject a reservation. > Place a bed hold. > Cancel a bed hold. > Place a notification on a bed.
Bed Board	Use this view to view beds, filter beds by attributes, or display bed details.
Floor Plan	Use this view to view rooms and beds for the selected facility, unit, or pod. To directly access the Floor Plan function, click on the Unit View panel.
Admissions Worklist	Use this worklist to process requests and view data to consolidate admission records.
Closed Bed Worklist	Use this worklist to view a list of closed beds and the closure details. Update or cancel the bed closure, or edit the bed status.

Use the worklist or view panel to create, cancel, edit, or view specific requests. The following table lists the request capability of the panels. Your access and ability to complete these requests depends on your role, user permissions, and the modules that your practice has purchased.

Worklist or view	Request capability
Portal View	 > Admissions > Direct Admissions (configurable for this panel; might be turned off in your hospital) > Discharge > Transfer



Chapter 2 Bed Management module

Worklist or view	Request capability
Unit View	 > Bed Swap > Bed Status (Housekeeping, Close Bed) > Discharge > Change Room or Bed (Move) > Patient Placement Response (Accept, Edit, Reject, Cancel) > Transfer
Pre-Admissions Worklist	Request Processing
Bed Management Worklist	 > Direct Admissions > Request Follow-up > Patient Placement > Transfer
Bed Board	 > Bed Turnover > Bed Closure > Transport > Transfer > Discharge > Change Room or Bed (Move)
Floor Plan	 > Bed Turnover > Bed Closure > Transport > Transfer > Discharge > Change Room or Bed (Move)
Admissions Worklist	Request Processing
Closed Bed Worklist	Close Bed (Edit, Cancel)



lcons

Icons

An icon is an image on the Allscripts Patient Flow[™] panel that represents a function or activity. If you point to an icon, a panel tip displays with a brief description of the icon. For example, point to the calendar icon () to display Open the calendar window.

Common icons

Other than the error icon ($^{\triangle}$), click a common Allscripts Patient Flow^{$^{+}$} icon to use the associated feature.

lcon	Location	Purpose
*	Top of left navigation pane	Collapses the left navigation pane to display more information on the right of the pane.
»	Unit View	Collapses the activity pane on the right and display more information on the left of the pane.
* *	Activity pane on Unit View	Click the down arrows to expand the section and display any pending activities. Click the up arrows to collapse the section.
8	On the right of patient rows on most work list panels	Displays on a patient row if a request is made for the patient (for example, a Bed Transfer , or Discharge Request). Click C to display a Cancel panel, where you can select a cancellation reason.
×	Top right of window and other panels	Closes the current panel without saving new information.
	Check In and other panels	Opens a calendar, where you can select a date.
Q	Check In and other panels	Opens a time picker, where you can pick one-hour time intervals.
•8	Data entry panels	Displays when data is missing from a required box after you try to save information on a panel or attempt to proceed to the next step.

Table 2: General icons



Chapter 2 Bed Management module

Icon	Location	Purpose
	Several pop-up panels (for example, Move Patient Off Floor)	Displays when an error is made in a date box (for example, you enter a future date in Off Floor Date Time on Move Patient Off Floor).
or E	Patient row on most worklists and view panels	When is displayed, enables you to view previous notes. If a note does not currently exist for the patient, if displays. Click the icon to add a note. Refer to the information in <i>Use the Notes</i> <i>Function</i> .
G	Patient row on most worklists and view panels	Displays on the right of the patient's name. Click this icon or the patient's name to open Patient Details .
VIP	Patient row on Portal View, Unit View, and Bed Management worklist panels or the activity pane on the Unit View panel	If a very important person (for example, a celebrity) is selected as a Confidentiality attribute for a patient, WP displays on the right of the patient's name. This functionality is available when the Very Important Person box is selected for the Confidentiality attribute on Attributes Maintenance in Admin .
	Left side of the Material Jobs tile on Transport Worklist	Identifies the material jobs displayed on Transport Worklist .



lcons

Patient tiles

Use the patient tiles to view pertinent information (for example, bed statuses, bed locations, isolation indicators, or patient activity information). All worklist panels, except for **Admissions Worklist**, are displayed with patient tile icons.



The top panel of the patient tile displays a bed status color. For example, if a bed is in the cleaning process, a yellow color is displayed. If a bed is occupied, a light blue color indicates a male patient, or a light pink color indicates a female patient.

A bed location identification, known as the "Bed ID", also displays in the top panel. The short version of the Bed ID indicates the room and bed location. For example the information is displayed on the **Portal View** and **Unit View** panels, or the facility, unit, or pod location for the bed is displayed in **Facl/Unit/Pod**. The longer version of the Bed ID includes the facility, unit, or pod identifier, which displays on **Bed Management Worklist** and other panels. The length of time that the patient has occupied the bed is on the right (for example, **1MO** for one month).

If there is any request activity for the patient, the bottom panel of the patient tile displays an icon, which indicates the type of request. For example, if a transfer is requested, the Transfer icon (**Tx**) displays in the bottom panel. A timer displays the time progression from when the activity was initiated (for example, **5M** for five minutes or **1D** for one day).

Examples of patient tiles that might display are described in the following table.

Tile example	Description
0112-01	Indicates an available bed.
0116-01	The start indicates that there is a bed ahead of the available bed.
R 0108-02 3D	Indicates that the bed is dirty and reserved for another patient. In this example, the dirty status is three days (3D) and a patient is reserved for this bed (R).



Chapter 2 Bed Management module

Tile example	Description			
0117-02 8M On	Indicates that the bed is dirty and the next bed. In this example, the patient is on floor (On) and the bed is in a dirty status for eight minutes (8M).			
	The red corner indicates an open Bed Turnover or Bed Repair request, which might result in an ADT mismatch if the patient is still occupying the bed in Allscripts Patient Flow [™] .			
0108-01 2D On Tx4H	The solid blue color indicates that a male patient is in the bed and on floor (On). In this example, the patient's length of stay is two days (2D) and the patient is scheduled for a transfer in four hours (Tx 4H).			
0215-01 On	The pink color indicates that a female patient is in the bed and on floor (On). In this example, the pink stripes indicate that an ADT activity is pending for the patient.			
R 0106-01 28D Kidney DC 13:55 2H	The orange striped border indicates an isolation bed that is occupied by an isolation patient In this example, a male patient is in bed and:			
	 The patient's length of stay is 28 days (28D). The patient is scheduled for discharged at 1:55 pm (DC 13:55). The patient is currently off floor in the Kidney location. The patient is expected to return from Kidney 			
	 in two hours (2H). Another patient is reserved to this bed or "hot-bunked" (R). 			
	Note: If a patient is in a semi-private bed on isolation and has a non-isolation roommate, the non-isolation roommate's bed tile border displays as Normal .			



Icons

Tile example	Description		
01-01 1M0 On	The blue striped border indicates an at-risk patient. In this example, the female patient's length of stay is one month (1 MO), the patient is in bed, and on floor (On).		
	Note: For a portal that is set up as a Portal Unit , the at-risk borders do not display on the Portal View . At-risk borders display when the portal unit beds or patients are viewed from Unit View .		
1141-01 11MO	The purple border indicates a ring-fenced bed.		
	In this example, a female patient is in bed, the patient's length of stay is 11 months (11MO), and the patient is scheduled for a transfer in two months (Tx 2MO).		
1140-01 9MO On TP 3H	The pink and blue striped border indicates that an isolation patient and an at-risk patient are sharing the same room.		

Use the following bed status colors on the patient tiles to determine the current bed status.

Color	Status				
(green)	Available				
(brown)	Dirty				
(lighter brown)	Dirty, next				
(reddish brown)	Dirty, urgent priority				
(yellow)	Cleaning in progress				
(purple)	Cannot clean (Delayed cleaning request)				
(black)	Closed				
(pink)	Occupied by female patient				
(blue)	Occupied by male patient				

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Chapter 2 Bed Management module

Color	Status		
(grey)	Occupied by unknown gender		

Patient activity timers and bed statuses

Use the patient activity timers and bed status indicators that display on Allscripts Patient Flow[™] patient tiles.

The following table provides information about the bed-cleaning status timers that are displayed in the bottom panel of the patient tile. If the bed-cleaning job is escalated, the status timer is displayed in a red color.

Status abbreviationDescriptionMMinutes (up to 90)HHours (up to 23)DDays (up to 30)MOMonths (up to 11)YYears

Table 3: Bed-cleaning status timers

The table following provides explanations of patient activity status indicators. Light grey indicators apply to bed requests that are processed within the patient's facility.

Table 4: Patient activity status indicators

Indicators	Description
AD	A pending patient admission.
RM	The patient is ready to move.
DA	A direct patient admission.
R	The patient has a bed reserved.
H	The patient is held to a bed.
	A pending transfer is scheduled for the patient.



Common workflows

Indicators	Description
TP	A pending transport is scheduled for the patient.
DC	A pending discharge is scheduled for the patient.
	A pending discharge with physician orders and other criteria is scheduled for the patient.
On	The patient is located on the floor.
Off floor indicators	The patient is located off floor (for example, RAD indicates that the patient is in Radiology).

Common workflows

Use common workflows in Allscripts Patient Flow[™] such as searching and filtering views or worklists, locating patients, or viewing patient histories.

Required information

When you create a new item or edit an existing item, most required boxes are indicated by an asterisk (*) on Allscripts Patient Flow[™] panels. If information is missing from a required box on a panel and you try to submit the information, an error message or the error icon (**4**) is displayed.

For example, on **Bed Swap**, you must select an option in the required **Select Patient** list to change the beds of a patient.

😑 Bed Swap	
1240-01 4MO Name	Carlle, Brailley
Select Patient	
Select	
	OK Cancel



Chapter 2 Bed Management module

Security timeout

For security and privacy reasons, Allscripts Patient Flow[™] has a timeout functionality, which automatically logs you out of the application after a specified time of application inactivity.

If you log on to Allscripts Patient Flow[™], but do not use it for a specified length of time, the panel automatically closes and the Allscripts Patient Flow[™] **Please Login** panel displays. You must log on again to access the Bed Management module. Save your changes periodically because if the timeout feature logs you out, any unsaved changes are gone and cannot be recovered.

Note: Specified timeouts are configured by your organization's system administrator.

Expand and collapse rows

To control the amount of information that is displayed, expand or collapse rows.

The rows on some worklist panels, such as the **Bed Management Worklist** panel, display a short summary of patient information. This collapsed view displays more patient rows on the panel. To expand the information, click a row. To collapse the expanded view, click the row again.

For example, when you click a row on **Bed Management Worklist**, the row is highlighted and expands to display more bed request information, such as **Attributes**, **Needs**, and **Bed Request Priority**. If an open bed request is indicated for the patient, more available beds (if matched) are displayed when the row is expanded.

Bed Management W	orklist						
CHD, COM, UNV		•				Q C T :	1
Location	Request	Information		Assign	nment		
ED 60MO AD OPEN 1MO UNV	F - 46y MRN 7 Dx Fever, Cough		Dr. Critical Care (CCRE) ETA 3/20 00:08	🔍 Find Bed	III Notes	More Suggestions	î
	Request By Last Change Duration Attributes Needs	Events, Workflow 4/16 07:11 (8D) Events, Workflow 4/16 07:11 8D High Near Nursing Station					

If patient information is displayed in the **Activity Pane** on **Unit View**, click inside the patient's row to expand the row or click inside the row again to collapse it. **Admissions Worklist** displays the expanded view of patient information in a different way.


Use search functionality

Some Allscripts Patient Flow^M panel fields include a search icon (for example, <). Click < to display a window that enables you to quickly search for a specific item (for example, a physician name).

In this workflow example, use \bigcirc on **Direct Admit** to find an admitting physician. The same workflow applies to other fields or panels where the search icon displays.

- 1. Click) on the **Portal View** or **Bed Management Worklist** to open the **Direct Admit** window. The **Admitting Physician**, **Attending Physician**, and **Referring Physician** fields are displayed with **C**.
- 2. For Admitting Physician, click .

The Admitting Physician panel displays.

			8
Admitting	Physician		
Last Name Care Service	[Select]	First Name MCR Number	
			Q Search 🖸 Clear 🖸 Close

3. Enter information into at least one field.

For example, enter the first few letters of the physician's last or first name. To further refine the search, select a value from **Care Service** or enter the physician's MCR number.

4. Click Search

As an alternative workflow, use the scroll bar to locate and select the physician's name.

A list of admitting physicians that match the search criteria displays.

- 5. Do one of the following:
 - > If the name of the admitting physician displays, double-click the physician's name.
 - > If the name of the attending physician does not display, change the search criteria and click

Search again. Double-click the physician's name.



The **Admitting Physician** panel closes, and the selected physician's name displays in the **Admitting Physician** field on **Direct Admin**.

If necessary, repeat the steps for Attending Physician or Referring Physician.

Use tabs and filters

Use the tabs in Allscripts Patient Flow[™] to display patient information, locations, requests, and so on. If necessary, create a new panel that is customized with your search and filter preferences.

The **All** tab is the first tab that displays on a worklist or view panel by default, and its name displays on the top left of the panel. All patients, locations, requests, and so on pertaining to that worklist or view panel display on the **All** tab. Initially, the **All** tab is the only tab that displays.

All worklist or view panels enable you to create a custom tab. After you name the new tab, a **Filters** panel displays that enables you to select filter criteria. Patients, locations, requests, and so on that do not meet the specified criteria are filtered out and do not display on the worklist or view panel. The **Sort By** box does not limit the number of rows displayed, but sorts the rows by a certain criteria (for example, by patient name). This filter functionality helps you find specific patients, locations, requests, or other items more quickly.

The boxes that display on the **Filters** panel depend on the current worklist or view panel. For example, the **Filters** panel for the **Pre–Admissions Worklist** has a **Pre–Admit Date Time** box that does not display on the **Filters** panel for the **Unit View**.

You can select multiple options for some boxes. If you do not want to use a box, leave it blank. For example, if you want to search for **Patient Transfer** requests on the on the **Unit View Filters**

panel, click if for **Request Type** and then select the **Patient Transfer** box.

To define the search for male patient requests, click red for **Pt Gender** and then select **Male**. Leave other boxes blank.



Filter Name	Transfers			-
Sort By		•	•	
Request Type			*	
Request Status			-	- 1
Time In Status	From	То	(min.)	
Request Time	From To			
Bed Status			*	
Pt Care Level			*	
Pt Care Service			-	
Pt Gender			-	
Pt Attributes			*	
Room/Bed Attributes			*	
Attn. Physician			*	
To Bed Status			*	
Off Service			· ·	- 1

When you click **Filter Now** on the **Filters** panel, the panel closes and only locations with a **Patient Transfer** requests and male patient occupants are displayed on the **Unit View** panel. If no patients match the filter criteria, No records to display, is displayed on the panel.

The activity pane information is not affected by the filtering, and any new patients in the **Action Required** or **Pending Arrival** sections are not filtered out.

Unit View		🛑 OCC : 72% 🛛 IN : 0 💭 DC	C:2	🔵 TX : 1 🛛 OCC : 10	
Facl/Unit/Pod UNV/CAR	•			Q. 😜	2
Location Patien	t Information	Pending Activity			
0 1139-01			^	Action Required (0)	¥
1140-01 58MO On	CARD (MDSG)	TE 156 DG 📟		Pending Arrival (0)	×
				Intra-Unit Activity (0)	¥
1140-02 58MO On	F - 86y 10/8/1932 CARD (MDSG)	TP TX DC		Waiting ADT Activity (0)	

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To use the filter functionality, create and name a filters tab, which is then used to save the filters options that you specify. The name of the new filters tab displays on the right of the **All** tab on the worklist or view panel. This filters tab is saved and displayed on your view of that specific worklist or view panel whenever you access it.

For the **Unit View** panel, the tab displays for all units that you can access. The tab is not displayed to other users. If you no longer want to use the custom tab, delete it. To view all locations in the unit again, click the **All** tab.

All tabs

Use the **All** tab on a Allscripts Patient Flow[™] view or worklist to view information about patients, locations, requests, and so on.

To display the information, click the **All** tab at the top of the view or worklist. No rows are filtered out on the **All** tab, and you cannot delete this tab.

Create custom filter tabs for worklists

Create a custom tab and select filters to display on the **Pre-Admissions Worklist**, **Bed Management Worklist**, or **Admissions Worklist**.

1. In the Bed Management module, open the worklist to edit.

The worklist panel displays and the **All** tab is the only tab that initially displays on the left side of the panel.

- 2. From the organization list, select or clear organizations to include or exclude in the tab.
- 3. Click 🚹
- 4. On the Add Tab window, enter a short name for the tab in Tab Name.

You cannot enter symbols into this field.

5. Click OK.

The **Add Tab** panel closes, the custom tab name is saved, and the new tab displays next to the **All** tab. Also, the filter window for the worklist opens.

- 6. To specify how the worklist is sorted, click react to **Sort By** on the filter window and select values from the list.
- 7. To select specific filter values, click in next to any field and select values from the list. If necessary click the calendar or time picker icons to select dates or specify times.

Values on the filter window can vary, depending on the worklist that you chose. The following figure is an example of the **Pre-Admissions Worklist Filters** window.



Pre-Admission	s Worklist Filters							
Filter Name Sort By	RansomTest Patient Gender Ascending							
Pre-Admit Date Time Placement Status	Today Reserved to Bed, Reserved to Unit, Pending Discharge							
	From To (min.) From 5/31/2020 16:00 To 9/30/2020 09:00 To 9/30/2020 09:00							
From Org	CHD/POD/CARD, CHD/POD/CATHP, CHD/POD/CH-EDH, CHD/POD/H							
To Org Patient Care Level	 ✓ Available ✓ Dirty 							
Patient Care Service Pt Gender	 ✓ Cleaning in Progress ✓ Occupied ✓ Closed 							
Pt Attributes Attn. Physician								
To Bed Status	Available, Dirty, Cleaning in Progress, Occupied, Closed							
	T Filter Now							

8. After selecting all filter values, click Filter Now.

Results of this task

The custom tab is created and displayed at the top of the worklist. When you click the tab on subsequent sessions, the worklist is sorted and filtered according to your filter selections.

If necessary, edit or update the custom tab and filters.

Create custom filter tabs for views

Create a custom tab and select filters to display on the Unit View or Portal View.

1. In the Bed Management module, open the view to edit.

The view panel displays and the **All** tab is the only tab that initially displays on the left side of the panel.

2. From the organization list, select or clear organizations to include or exclude in the tab.



- 3. Click 🚹
- 4. On the Add Tab window, enter a short name for the tab in Tab Name.

You cannot enter symbols into this field.

5. Click OK.

The **Add Tab** panel closes, the custom tab name is saved, and the new tab displays next to the **All** tab. Also, the filter window for the view opens.

- 6. To specify how the view is sorted, click react to **Sort By** on the filter window and select values from the list.
- 7. To select specific filter values, click in next to any field and select values from the list. If necessary click the calendar or time picker icons to select dates or specify times.

Values on the filter window can vary, depending on the view that you chose. The following figure is an example of the **Unit View Filters** window.



Filter Name	Rans	omTest					
Sort By	Patie	nt Age		-	Ascendir	ng 🔽	
Request Type	Pendi	ng Discharge, Trans	fer R	equest, P	atient Mov	e/Swa 🔽	
Request Status						-	
Time In Status	From	5	То	15		(min.)	
Request Time	From	9/7/2020 01:00	Ē	O			
Request time	То	9/28/2020 23:00		O			
Bed Status	Availa	able, Dirty, Cleaning	in Pr	ogress, O	ccupied, Cl	osed 🔽	
Patient Care Level	CCRE	- Critical Care, MDS	G - M	1ed-Surg,	, MNTD - CO	ом м 🔽	
Patient Care Service	CARD	- Cardiology, GI - G	astro	enterolo	gy, GSRG -	Gene 🔽	
Pt Gender	Male,	Female, Unknown				-	
Pt Attributes	Airbo	rne Isolation - Tuber	culos	sis, Confi	dentiality - /	AIDS 🔽	
Room/Bed Attributes	Availa	able Equipment - Lar	ge B	ed, Ringf	enced Beds	- Rin 🔽	
Attn. Physician	Dr. S	МІТН				-	
To Bed Status	Availa	able, Dirty, Cleaning	in Pr	ogress, O	ccupied, Cl	osed 🔽	
Off Service	Yes					-	

8. After selecting all filter values, click Filter Now.

Results of this task

The custom tab is created and displayed at the top of the view. When you click the tab on subsequent sessions, the view is sorted and filtered according to your filter selections.

If necessary, edit or update the custom tab and filters.

Edit criteria on custom tabs

Edit the filter or sort criteria on a custom tab for a worklist or view.

1. In the Bed Management module, open the worklist or view to edit.



Click the custom tab.
 You cannot edit the All tab.

3. Click

4. On the filters window, update any fields.

To remove information from specific fields, click 🔀 and clear any selected values.

5. Click Filter Now.

The filters window closes and the new filter criteria displays on the custom tab for the worklist or view.

Delete custom tabs

Delete a custom tab that contains search and sort filter criteria for worklists or views.

- 1. In the Bed Management module, open the worklist or view to edit.
- 2. Click the custom tab.

You cannot delete the All tab.

Click

Important: Verify that you want to delete the tab before you click because no confirmation panel displays.

The custom tab is removed from the worklist or view.

Messages functionality

Use the **Messages** functionality to view, create and send, or delete messages within Allscripts Patient Flow[™]. Expand the left navigation pane to display the **Messages** options.

Messages does not have the same functionality as an email application, such as Microsoft[®] Outlook[®] because it is limited to people and organizations that are defined in Allscripts Patient Flow[™].

Your organization's system administrator can configure **Messages** to receive applicable types of messages (for example, **Standard**, **Escalation**, and **Alert**), and to subscribe to various messages by default. If you have the applicable permissions, click **Account Settings** and change these message settings on the **Check Out** or **Message Event Subscriptions** panels.



View messages

Use the **Messages** functionality to view messages that are exchanged within Allscripts Patient Flow[™].

1. Click we to expand the left navigation pane and display the **Messages** options.

The **Inbox** button (for example, ^{2 Inbox}) indicates the total number of messages received. Messages are displayed in chronological order with the most recent message first. Only the first 30 characters of a message are displayed.



2. To view the list of messages in an expanded view, click Inbox.

Messag	jes Inbox			
	New 🔯 Delete All	Sort By Date	○ Ascending	
	From	Subject	Message	Date
	1.768	Ad Hoc Message	Elevator 2 is not working	3/27 12:51
	1.1000	Ad Hoc Message	ED needs a large wheelchair.	3/27 12:50

You can also create or delete messages from this expanded view.

- 3. To filter the list of messages, select one of the followings values from Sort By.
 - > Date
 - > Subject
 - > Status
 - > Message
- 4. To sort the list of messages, select one of the following:
 - > Descending (default)
 - > Ascending

If necessary, use the scroll bar to navigate long lists of messages.



Create and send messages

Create and send messages using the **Messages** functionality in Allscripts Patient Flow[™].

- 1. Click we to expand the left navigation pane and display the **Messages** options.
- 2. From **Messages**, complete one of the following steps:
 - > Click New
 - > Click Inbox and then click New

	w Message
	Name
	Allscripts, SystemAdmin
	Gateway, Communications
	Add
То	•
Message	1
	Send Cancel Clear

- 3. Select a recipient name from the list.
- 4. (Optional) To search for a specific recipient, enter a name into the Name field and press Enter.
- 5. Click Add.
- 6. In Message, enter any text.
- 7. Click Send.



Delete messages

Delete messages in your inbox with the **Messages** functionality in Allscripts Patient Flow^T.

- 1. Click we to expand the left navigation pane and display the **Messages** options.
- 2. From **Messages**, complete one of the following steps:
 - > To delete an individual message, click <a>[next to the message.
 - > To delete all messages in a single action, click M Delete All
 - > Click Inbox. On Messages Inbox, click 📮 or 🔟 Delete All.

The messages are removed from the **Messages** pane and from **Messages Inbox**.



Patient Locator

The Patient Locator functionality is available for all Bed Management modules to help you find

patients currently located in your facilities. Click Patient Locator at the top right of the panel to display the **Patient Locator** panel.

CEAD CH					
SEARCH Last Name Thom MRN	ipson X	First Name Acct #		Gender	[All]
Patient	Gender	DOB	MRN		Acct #
Thompson, .	м		4		TJ02
Thompson,	F	•		516	013580
Patient Information Patient Name DOB MRN Acct #	Thompson, : 7, . , J 4308!		Patient Location Current Reserved To Departed From Off Floor	CHD/HEM None None No	/ONC521901
Patient Name DOB	Thompson, : 5, . ,		Current Reserved To Departed From	None None	/ONC521901

Locate patients

Locate a patient in the Bed Management module of Allscripts Patient Flow[™].

- 1. With the Bed Management module open, click
- 2. On Patient Locator, enter criteria in any of the fields in SEARCH. Search criteria includes:
 - > Last Name: Enter the first few letters of the patient's last name.
 - > First Name: Enter the first few letters of the patient's first name.
 - > Gender: Select a gender value from the list.



- > **MRN**: Enter the patient's Medical Record Number (MRN).
- > Acct#: Enter the patient's account number.
- 3. Click Search or press Enter.

A list of patients who match your search criteria are displayed. If necessary, click **Clear** to clear the search criteria and start over.

- 4. To view patient information, complete one of the following actions.
 - Click the patient's name. A summary of the patient's information and location are displayed on **Patient Locator**.
 - To details for the patient, click Patient Details. The Patient Details panel opens. Depending on your permissions, view or update items such as the patient's attributes, requests, notes, and so on.
- 5. On Patient Locator, click Close.

Patient Details

Use the **Patient Details** panel to view and edit details for a patient (for example, patient attributes, requests, notes, and so on.) The current visit information for the patient is also displayed on this panel.

F	Patient Details															
] 📑 💆															
		-		-	-				_			_	_	-		
	1240-01 77MO	Last	Curtis						MRN	49349						
	Tx4D	First	E y			Middle			Acct	28785						
		DOB	8/5/1	Age	21y	Gend	er	м	Attn	5 I, JOHN						
		Dx	Tachycardia													
ſ	Attribute Reques	sts 🔪 N	otes Contacts	Medi	cal Provi	der 🔪 Task	List	CV Indicators								
L	Visit Information															_
L																
L	Care Level	*	Theo burg		-						Care Service	*	Cardiology		*	
L	Patient Class	*	Inpatient		-											
L																
L	Patient Safety															
L	Security							-							Ring Fencing	
L	Patient Mobility			C	Select]			-			Disability					-
L	Patient Condition			[Select]			-			Confidentiali	ty				-
L	Fall Risk			L	.ow			-								
L																
L	Personal Preferen				_											
I	Patient Preference	e	[Select]		-											
I	Icologia	~ ~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	<u> </u>		مر	•		-	~~~		~				
h	15,000				~~~	and the second	\sim	~~~~			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~				



Depending on your assigned permissions, access Patient Details in the following ways.

- On Portal View, Pre-Admissions Worklist, or Bed Management Worklist, click a patient's name.
- > On Admissions Worklist, select a patient and then click Patient Details.
- > On **Unit View**, click the patient's name to open **Patient Summary** and then click **Patient Details**.
- In the banner, click Patient Locator, search for and select the patient, and then click Patient Details.

You can view information on this panel, but the role and user permissions associated with the authorization item, **Patient Details - Update**, determine whether you can edit the information. Also, fields on some of the tabs are configurable (for example, the fields on the **Attribute** tab).

Patient Details tabs	Description
Attribute	Displays the patient's visit information and configured patient attributes such as patient safety and isolation. The selected attributes specify the bed search for the patient as well as the icons that are displayed for the patient on Floor Plan .
Requests	Displays information about pending requests (for example, Transfer requests).
Notes	Click New to enable the Details pane, where you can select a patient note type and enter text. Patient note types might include: > Patient Address > Bed Request > Care Visibility Note > Diagnostic > General > Nursing > Patient > Procedural > Schedule Remarks > Other Schedule Details Any patient notes are displayed under the Notes tab with the date the note was entered, the date that the note becomes inactive, and the note text.



Patient Details tabs	Description
Contacts	Click New to enable the Details pane, where you can enter the contact name for the patient, relationship, contact method, and address and phone numbers. The contact information that you enter is displayed under the Contacts tab.
Medical Provider	Displays the name, specialty, and contact information of the patient's medical providers (for example, the admitting or attending physician).
Task List	Displays the patient's current tasks. Select the Discharge Milestones or Transfer Center Tasks value to filter the tasks.
CV Indicators	Displays the fields and patient attributes that are identified in the administration tool for Patient Fields and Attributes .

Notes functionality

In the Bed Management module, create notes on all worklist or view panels, except for the **Closed Bed Worklist**, or create patient notes during a request workflow.

Patient notes

Use the **Notes** tab to create patient note types and also indicate if ta patient's notes are deactivated at a future time.

1	Attribute Requests	Notes Contacts M	ledical Provider \ Task List	CV Indicators				
					New	Details		
	Note Type	Date	Inactive Date	Notes		Note Type	*	
					-	Inactive Date)	
	Patient Address	3/20/2019				Notes*		
					-]
								_
							OK Cancel	



Patient notes are saved and associated with a patient's visit. A patient can have multiple notes associated with a visit. If the patient has had multiple visits, the notes are stored separately according to the visit number. For example, a patient might have moved between visits, so the address can be stored as a **Patient Address** note type according to the visit.

The **Patient History** panel displays the information for the patient's visits. On the **Visit Information** tab, select a visit number. Click the **Notes** tab to view the notes that are associated with that specific visit.

	Age Gi	Middle iender M	MRN 2
Notes Care Level Care Service	Diagnosis WorkFlow Accommod	dations Patient Class Patier	nt Condition Attributes
RTLS Milestones			
Date	Notes		
2/28/2019			
nunications 2/17/2014	General Note on patient		
nunications 2/17/2014	General Note 2 on patient		
r	Notes Care Level Care Service RTLS Milestones Date 2/28/2019 aunications 2/17/2014	Age G Notes Care Level Care Service Diagnosis WorkFlow Accommon RTLS Milestones Date Notes 2/28/2019 2/17/2014 General Note on patient	Middle Age Gender Milestones Date Notes 2/28/2019 aunications 2/17/2014 General Note on patient

Create patient notes

Use the Notes tab to create patient notes or specify when notes become inactive.

Before you begin

Verify you have the adequate permissions to save information on Patient Details.

- 1. In the Bed Management module, access the **Patient Details** panel from a view or worklist.
- 2. Click the Notes tab.

Any existing notes for the patient are displayed in chronological order.

3. Click New.

The **Details** section opens.

4. Select a value from Note Type.

Patient note type values might include:

- > Patient Address
- > Bed Request
- > Care Visibility Note
- > Diagnostic



- > General
- > Nursing
- > Patient
- > Procedural
- > Schedule Remarks
- > Other Schedule Details
- **5.** (Optional) To specify a date and time for the patient note to be deactivated, enter information into **Inactive Date**.

Tip: Click I to select a date or click 🔯 to select a time.

- 6. For Notes, enter any text.
- 7. Click OK.

The note is displayed under the **Notes** tab with the note type. If you added a deactivation date and time, that information is also displayed under **Inactive Date**.

Important: Verify that the new note is correct on the **Notes** panel before you save. Patient notes cannot be edited or deleted.

8. To save the action, click

Request workflow notes

In addition to patient notes, create notes during a request workflow (for example, from **Bed Management Worklist**, **Direct Admit**, or **Discharge and Milestones**).

For example, on **Bed Management Worklist**, the BNOTES or **Notes** options might be displayed under **Assignment**.

Bed Management V	/orklist			
CHD, COM, UNV	•		Q C T :	2
AI				
Location	Request Information	Assignment		
ED 60MO AB OPEN 1MO UNV	F - 46y MRN Dx Fever, Cough, r/o TB	Dr. Critical Lare (LUCE) ETA 3/20 00:00 B Notes	More Suggestions	^
ED COMO COPEN 1MO UNV ED COMO ED COMO ED COMO UNV	F - 36y MRN Dx Anemia	Dr. Critical Care (CCRE) ETA 3/20 00:08	More Suggestions	
ED 60MO @ OPEN 1MO UNV	M - 64 MRN Dx: R/O Brain Aneurysm	Dr. Critical Care (CCRE) ETA 3/20 00:00 Notes	More Suggestions	

The Notes option indicates that notes are added to the patient record. Point to the icon to display a tooltip with the most current note. To view all notes or add a new note, click the icon or **Notes**.



The **Notes** option indicates that no notes are added. Point to the icon to display Add a note. To add a new note, click the icon or **Notes**.

The **Notes** window opens with a list of notes created for the request. If no notes exist, No Notes is displayed.

🗐 Notes - 🦳 Thomas	
9/14 01:30 - Workflow Events Request created during upgrade to . It replaces a request with workflow number 66.	^
9/14 08:28 - Workflow Events Request created during upgrade to . It replaces a request with workflow number 88.	
Add a Note	
✓ Note visible to all users Ad	d Close

To prevent the note from displaying to all users and make it *private*, clear **Note visible to all users**. A private note is visible only to the person who created it and to any user with the same role as the note creator at the time the note was created.

For example, if a user is assigned to the *Bed Control* and *Nursing Supervisor* roles but checks in only as a *Nursing Supervisor* and then creates a note, any user who is signed in with the *Nursing Supervisor* role can view the note. If the note creator checks in later with only the *Bed Control* role, they cannot view the note because it was created with the *Nursing Supervisor* role.

You can also add a note when you create a **Direct Admit Bed** request. For example, on **Direct Admit**, enter notes pertaining to this request in the **Notes** field. If necessary, clear **Note visible to all users** to make the note private.



Direct Admit								
Patient Detail	s S	creen I 🕚 🔿 🔿 🔿						
Last *								
First *		Age	Middle Ger	nder *	Unknown			
Visit Information								
Dx	*							
Facility	*	UNV	-					
Care Level	*	[Select]	-			Admit D/T	*	10/20/2018 11:22 🔟 🔯
Care Service	*	[Select]	-			Admit Source	*	UNV Emergency Departmen
Patient Class	*	[Select]	-					
Admitting Physician			Q.					
Attending Physician			Q.			Patient Condition		[Select]
Referring Physician			٥,			Patient Location		
Caller's Name						Patient Contact Name		
Caller's Number						Contact's Relationship		[Select]
Insurance Company						Contact's Number		
Authorization Unit Selection	*					Preferred Unit Bed Request Priority		[Select]
Notes	•		M			beu kequest Priority		[Select]
Ē								
		☑ Note visible to all users						
								Cancel Next >

After submitting the request, view the associated note. When you point to BNOTES, the notes are displayed like a tooltip. For a **Direct Admit Bed** request, the notes that you entered are also displayed in the **Bed Management Worklist**. Also, if Direct Admit functionality is used on **Portal View**, the note is displayed in the **Bed Management Worklist**.

Bed Management V	Vorklist			
CHD, COM, UNV	•		Q C T i	1
AI AI				
Location	Request Information	Assignment		
ED 60MO (AB) OPEN 1MO UNV	F - 46y MRN DX Fever, Cough, r/o TB	Dr. Store LLL22 ETA 3/20 00:06	More Suggestions es 🕄 Edit 🖨 Cancel	î
ED 60MO (A) OPEN 1MO UNV	C F - 36y MRN Dx Anemia	Dr. Criscal Care (CCBE) ETA 3/20 00:06	More Suggestions es 🗣 Edit 🧧 Cancel	
ED GOMO GOPEN 1MO UNV ED GOMO GOPEN 1MO UNV ED GOMO GOPEN 1MO UNV	M - 64 MRN Dx: R/O Brain Aneurysm	Dr. Criscal Care (CCBE) ETA 3/20 00:06	More Suggestions es 🕄 Edit 🚨 Cancel	



After a workflow for a patient request is completed, the workflow notes are stored in the **Workflow** tab in **Patient History**. To access these notes, click **Workflow**, double-click a workflow, and view the **Notes** section in **Workflow History**.

Notes				
Туре	Create Person	Date	Notes	
General	Events, Workflow	9/14/2020 01:30	Request created during upgrade to . It replaces a request with workflow number 32.	^
General	Events, Workflow	9/14/2020 08:28	Request created during upgrade to . It replaces a request with workflow number 87.	ł
General	Events, Workflow	9/15/2020 02:29	Request created during upgrade to . It replaces a request with workflow number 160.	~

Finally, you can also enter notes for other types of request workflows. For example, when a discharge request is created for the patient, enter notes pertaining to the request in the **Notes** field on **Discharge and Milestones**. If necessary, clear **Note visible to all users** to make the note private.

Discharge and Miles	tones
3201-01 97MO Firs Mid MR	st dle
Discharge Detail Mile	stone Status Manage Milestones
Discharge Date * Discharge Time	5/27/2022 Image Milestones Physician Orders
Discharge Type *	[Select]
Discharge To	
Discharge Physician	[Select]
Death Date/Time	
Cause Of Death Notes	
	✓ Note visible to all users ▼
	Pending Depart Close



Create request notes

Create notes about the patient during a request workflow.

- 1. To create a note in a worklist or view that displays the note options (Notes or Notes), complete the following steps:
 - a. Click I Notes or Motes
 - b. On the Notes window, enter text into Add a Note.
 - c. (Optional) To specify that the note is private, clear Not visible to all users.

A *private* note is visible only to the person who created it and to any user with the same role as the note creator at the time the note was created. By default, **Not visible to all users** is selected and the note can be viewed by all users.

d. Click Add.

The request note is added to **Notes** with your name and the date and time of the note creation. If you designated the note as private, it is displayed in blue.

e. Click Close.

After you save or submit the request, the note is added to the patient's record and applicable pages.

- To create a note on a window (for example, Direct Admit or Discharge and Milestones), complete the following steps:
 - a. Enter text into the Notes field.
 - **b.** (Optional) To specify that the note is private, clear **Not visible to all users**.

A *private* note is visible only to the person who created it and to any user with the same role as the note creator at the time the note was created. By default, **Not visible to all users** is selected and the note can be viewed by all users.

After you save or submit the request, the note is added to the patient's record and applicable pages.



Patient History

Use the **Patient History** panel to view a patient's history (for example, visit information, care team, contacts, notes, and so on).

To access Patient History, open Patient Details and click the patient history icon (for example,



,			
Patient History			
E			
CHD ED 60MO	Last		MRN
	First	Middle	PUID
	DOB	Age 7y Gender M	
Visit Information Care Tea	m Contacts Notes Care Level Care Ser	vice Diagnosis WorkFlow Accommodations Patient Class P	Patient Condition Attributes Location Status
Patient Fields Task List	RTLS Milestones		
Visit 31			
Visit			
Acct #	On Floor Yes	Pre-Admit Date	
Inactive Date	External Create Date 5/12/2014 13:18	Direct Admit Patient Location	
	,		
Admit Info.			
Type Elective	Admit Date 5/12/2014 13:18	Est. Time	
Organization	Contact Name	Contact Phone	
Financial			
Status 0000	Insurance Auth Num	Insurance Company	
- Discharge Information -			
From	Discharge Type	Discharge Date	
	Discharge Type	Discharge Date	

Patient History is view-only so you cannot enter any changes to patient data on this panel. To

select a previous patient visit, click for **Visit** on the **Visit Information** tab. The information that displays on the panel corresponds to the visit number that you select.

Patient History tab	Description
Visit Information	Displays information for the visit number selected in Visit . This tab displays when the panel initially opens and information for the current visit displays by default.
Care Team	Displays medical providers associated with the patient's visit.
Contacts	Displays any contact information that was entered in the Patient Details panel.



Patient History tab	Description
Notes	Displays any notes that were entered in the Notes tab on the Patient Details panel (for example, the patient's address).
Care Level	Displays the history of the care level that is assigned to the patient (for example General or Intensive Care).
Care Service	Displays the history of the type of medical care that is requested for the patient (for example, Internal Medicine).
Diagnosis	Displays a history of the patient's diagnoses for selected visit.
WorkFlow	Displays any workflow information for the selected visit (for example, Pending Discharge). Click this button to display the Workflow History panel in view-only format.
Accommodations	Displays a list of accommodation codes assigned to the patient.
Patient Class	Displays the patient class for the selected visit.
Bed Class	Displays all of the bed class changes and the person who last modified the bed class.
Patient Condition	Displays the patient condition for the selected visit.
Attributes	Displays any attribute information that was entered in the Patient Details panel.
Location Status	Displays a history of all patient locations from the origin of admission through discharge.
Patient Fields	Displays various patient information (configurable) for the selected visit, such as the patient's home phone.
Task List	Displays the task list for the patient's selected visit.
RTLS	Displays a history of Real Time Location System (RTLS) tags assigned to the patient.

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Patient History tab	Description
Milestones	Displays a history of milestones completed (for
	example, Discharge).

Patient History tabs	Description
Visit Information	Displays information for the visit number selected in the Visit box. This tab displays when the panel initially opens, and information for the current visit displays by default.
Care Team	Displays medical providers associated with the patient's visit.
Contacts	Displays any contact information that was entered in the Patient Details panel.
Notes	Displays any notes that were entered in the Notes tab on the Patient Details panel, such as the Patient Address.
Care Level	Displays the history of the Care Level assigned to the patient, for example General, Intensive Care.
Care Service	Displays the history of the type of medical care that is requested for the patient, for example, Internal Medicine.
Diagnosis	Displays a history of diagnoses the patient has had during the selected visit.
WorkFlow	Displays any workflow information for the selected visit, such as a Pending Discharge. Clicking this button displays the view-only Workflow History panel.
Accommodations	Displays a list of accommodation codes that the patient has had.
Patient Class	Displays the patient class for the selected visit.
Patient Condition	Displays the patient condition for the selected visit.
Attributes	Displays any attribute information that was entered in the Patient Details panel.



Patient History tabs	Description
Location Status	Displays a history of all patient locations from the origin of Admission through Discharge.
Patient Fields	Displays various patient information (configurable) for the selected visit, such as Home Phone.
Task List	Displays the task list for the patient's selected visit.
RTLS	Displays a history of Real Time Location System tags assigned to the patient.
Milestones	Displays a history of milestones completed, for example, for Discharge.

View pending discharge milestone task ratios

From the **Portal View** or **Unit View**, view the task ratio for a patient's pending discharge milestones.

If a patient has a pending discharge, it is indicated by a **DC** icon (**S**, **S**, or **S**) in the **Pending Activity** column or patient tile.

If a patient has pending discharge activity with milestones, the discharge milestone tasks ratio is displayed on the right of the **DC** icon. A ratio of completed to total milestone tasks is displayed as a link. For example, **3:26** indicates that three out of 26 tasks are completed, or **0:0** indicates that no tasks are completed.

R 1242-01 77MO On TP1D DC4D	, Jaquelyn F - 9y 11/19/2010 MRN 4585 Dx Diarrhea, Arrythymias	Dr. R CARD (MDSG) ETA DC 9/11 23:59	0:0 📑 🧐	TP TX I
R 1243-01 77MO On T⊗4D DC 12H	F - 23y 11/26/: MRN 3767 Dx Chest/Arm Pain, BLE edema	Dr. \ CARD (MDSG) ETA DC 23:59	Tx ■ () ■ 0:26	Unassigned : :

Click the ratio link to display **Discharge and Milestones**, where you can view or update the assigned tasks.



Discharge and Miles	tones		,
1139-01 2MO Last T×12D OC 13H First Middle MRN Discharge Detail Milestone	Status Manage Miles	toner	
Milestone	Owner	Status	
Crutch Walking	РТ	Open	-
Chest Xray	XR	Open	-
Family Notified	Nursing	Assigned	-
Physician Order	Nursing	Open	-
Blood Work	Lab	Open	-
Transportation Scheduled	Nursing	Open	-
Diabetic Teaching	Dietician	Open	

In the application, if a task is assigned a status where the Complete YN = Y, the complete to total ratio is updated. Complete statuses include: Complete, Entered in Error, or Not Required. The following table provides explanations of the **Discharge and Milestones** status values.

Status	Status description	Complete YN
ASSN	Assigned	Ν
CMPL	Complete	Y
ERR	Entered in Error	Y
INPR	In Progress	Ν
NTRQ	Not Required	Y
OPEN	Open	Ν



Chapter 3 Portal View

Portal View is a specific area that acts as a gateway for hospital patients. For example, the Emergency Department is considered a portal.

For each portal that you work in, use the **Portal View** to view information such as bed location and status, patient information, and physician information. Information for new admitted patients transmitted through HL7 messages displays on **Portal View**. Also, use **Portal View** to create, edit, or cancel bed, direct admit, discharge, and transfer requests, and view the status of each request.

To access the **Portal View** page, click **Bed Management > Portal View** in the left navigation pane.

Use the **Facl/Unit/Pod** list on **Portal View** to display the patients who are assigned to a specific facility, unit, or pod. If you work in only one unit or pod, the name of that organization displays automatically in the **Facl/Unit/Pod** box. If you work in multiple organizations, you can choose a

different organization from the list. Click and select the specific organization from Facl/Unit/Pod.

Your view of organizations is also based on your role and user permissions. You can view organizations only where you work and have access to the organization's patients. For example, if you work in Surgery and Same Day Surgery, you can only view information for those organizations. You cannot view bed information for other organizations, such as the Emergency Department.

Use the following icons under the **Pending Activity** column on **Portal View** to view patient information or create requests:

- > III (transport icon)
- > 🚺 (transfer icon)
- > (discharge icon)
- > A (admission icon)

However, if the request type is not applicable or if a patient has an incomplete request, the icon for that request is unavailable and displayed in grey. For example, in the following image, the patient already has a bed so the admission icon displays in grey. Transport requests are different because a patient can have multiple transports requests at the same time.



Chapter 3 Portal View

Portal View			
Facl/Unit/Pod	NV/ED	- -	24
Location	Patient Information	Pending Activity	
UNV ED 58MC	o 6	INTE TRE POL	^
UNV ED 58MC	Ø	85 12 10	l
UNV ED 58MC	, ¹		
	man March	and the second	5



Chapter 4 **Portal View workflows**

From **Portal View**, complete workflows such as direct admit, transport, or transfer of patients.

Direct Admit functionality

When enabled for your organization, use the Direct Admit functionality on Portal View to directly admit a patient. The functionality is also available on the Bed Management Worklist.

Click to open the **Direct Admin** window.

Direct Admit										
Patient Detail	s Sc	reen I 🔍 🔿 🤇	0 0							
Last * First * DOB		Age	Midd	lle Gender *	Unknown					
Visit Information										
Dx	*[_]
Facility	*	UNV	•							
Care Level	*	[Select]	-			Admit D)/Т	*	10/20/2018 11:22	e Q
Care Service	*	[Select]	-			Admit S	ource	*	UNV Emergency Dep	artmen 🔽
Patient Class	*	[Select]	-							
Admitting Physician				Q *						
Attending Physician				Q *		Patient	Condition		[Select]	*
Referring Physician				Q *		Patient	Location			
Caller's Name						Patient	Contact Name			
Caller's Number	ļ					Contact	's Relationship		[Select]	•
Insurance Company	ļ						's Number			
Authorization						Preferre			[Select]	•
Unit Selection	*		*			Bed Red	quest Priority		[Select]	
Notes										
_		✓ Note visible to a	ll users							
									Cancel	Next >



Chapter 4 Portal View workflows

Create Direct Admit requests

Use Direct Admin to create and submit a bed request for a direct-admit patient.

- 1. In the Bed Management module, access **Portal View**.
- 2. If your organization is not displayed on **Portal View**, click next to **Facl/Unit/Pod** and select the applicable organization.
- 3. Click

Direct Admit opens on the Patient Details Screen I section.

Direct Admit				
Patient Detail	s Screen I 🔹 🔿 🔿 🔿			
Last * First * DOB	Mice Mice	dle Gender * Unknown		
Visit Information				
Dx	*			
Facility	* UNV			
Care Level	* [Select]	- Ad	dmit D/T	• 10/20/2018 11:22 🔠 🔯
Care Service	* [Select]	Ac Ac	dmit Source	UNV Emergency Departmen
Patient Class	* [Select]			
Admitting Physician		Q.		
Attending Physician			atient Condition	[Select]
Referring Physician		م Pa	atient Location	
Caller's Name			atient Contact Name	
Caller's Number			ontact's Relationship	[Select]
Insurance Company			ontact's Number	
Authorization Unit Selection	*]	referred Unit ed Request Priority	[Select]
Notes		De	ed Request Phonty	[Select]
đ				
	☑ Note visible to all users			
				Cancel Next >

4. Enter information to all required fields, which are designated with an asterisk (*). Enter information into optional fields or leave the fields blank. The individual fields are described in the following table.



Direct Admit functionality

Field	Action
Last*	Enter the last name of the patient.
First*	Enter the first name of the patient.
Middle	Enter the middle name of the patient.
DOB	Enter the patient's date of birth (DOB) in MM/DD/YYYY format. Click the calendar to select a date.
Age	The patient's age is calculated automatically based on the entry in DOB .
Gender*	Select a gender value from the list. By default, Unknown is selected.
MRN*	Enter the unique Medical Record Number (MRN) that is assigned to each patient.
Patient information from hospital systems	If a patient's MRN is in the hospital's system, the application fills the following fields: Last First DOB Age Gender Note: The Update Patient Info button is displayed only when the DAMR and UPID system options are set to Yes. Click Update Patient Info after you enter the MRN details.

5. Enter required or optional information into the **Visit Information** section, as described in the following table.

Field	Action
Dx*	Enter the diagnosis (Dx code) for the patient. The Dx code is based on your hospital's values.
Facility*	Select the facility.
Care Level*	Select the care level.



Chapter 4 Portal View workflows

Field	Action
Care Service*	Select the care service required.
Patient Class*	Select the patient class. The default is Inpatient .
Admitting Physician*	Click $\stackrel{<\!\!<\!\!<\!\!<\!\!}{}$ to search for and select the admitting physician's name.
	Note: Depending on your settings, this field might not be required.
Attending Physician*	Click ^{Q*} to search for and select the attending physician's name.
	Note: Depending on your system options, this field might not be required in both the Admission and Transfer requests.
Referring Physician*	Click ^{Q*} to search for and select the referring physician's name.
Caller's Name*	Enter the name of the caller.
	Note: Depending on your settings, this field might not be required.
Caller's Number*	Enter the phone number of the caller.
	Note: Depending on your settings, this field might not be required.
Insurance Company	Enter the patient's insurance company.
Authorization	Enter any authorization information for the patient (for example, a code from the health insurer).
Unit Selection	Based on the care level, select the unit. Otherwise, this field is unavailable.
Notes	Enter patient note information that cannot be entered in other boxes.



Direct Admit functionality

Field	Action
Admit D/T*	Enter the admission date and time. By default, the current date and time are displayed. To change the date, click and select the date. To change the time, click and select the time.
Admit Source*	Enter the organization that is the source of the patient's admission.
Patient Condition	Select the medical condition of the patient.
Patient Location	Enter the current location of the patient.
Patient Contact Name	Enter the contact name for the patient (for example, a relative).
Contact's Relationship	Select the contact's relationship to the patient.
Contact's Number	Enter the phone number for the patient's contact.
Preferred Unit	Select the unit that is preferred for the patient.
Bed Request Priority	Select the priority of the bed request.

6. Click Next.

Patient Details Screen II of Direct Admit is displayed.



Chapter 4 Portal View workflows

Direct Admit						
Patient Details	s Screen II 0 • 0 0					
Last *						
First * DOB	Mi	iddle Gender * Unknown				
Patient Safety						
Disability Security Patient Condition	[Select]	Patient Mobility Confidentiality Fall Risk	[Select]			
Personal Preference			[Select]			
Patient Preference	[Select]	*				
Isolation						
Contact Isolation Droplet Isolation		Airborne Isolation	Chemotherapy	•		
Financial						
Insurance	[Select]	*				
Patient Needs						
				< Back Su	Ibmit Cancel	Next >

7. (Optional) On Patient Details Screen II, click and select values for any field.All fields on this window are optional. Fields are described in the following table.

Note: The fields on **Patient Details Screen II** are based on your hospital's configuration and might vary from the fields described.

Field	Action	
Disability	Select multiple disability values for the patient.	
Security	Select multiple values that describe the protection plan and policies required to meet the needs of the patient.	
Patient Condition	Select the patient's condition level.	
Patient Mobility	Select a value that describes the patient's need for mobility assistance equipment.	



Direct Admit functionality

Field	Action	
Confidentiality	Select multiple confidentiality details that apply to the patient.	
Fall Risk	Select a value that specifies the patient's risk of falling.	
Patient Preference	Select the type of room requested.	
Contact Isolation	Select multiple contact isolation values.	
Droplet Isolation	Select multiple droplet isolation values.	
Airborne Isolation	Select multiple airborne isolation values.	
Chemotherapy	Select this box to specify that the patient is receiving chemotherapy treatment.	
Insurance	Select the applicable health coverage.	
Telemetry	Select this box if the patient needs to be monitored and special equipment is needed.	

- 8. Review the information entered for accuracy. Do one of the following:
 - > To correct information that was previously entered, click <a>Back until you reach the window.
 - > Correct the information.
 - When all corrections have been made, click Next > to go to the Patient Details Screen II again.
 - To submit the request without reviewing or entering information on the Patient Needs Screen
 III, click Submit

Patient Details Screen II closes, and the bed request for the direct-admit patient is submitted. The new patient information is displayed on **Portal View** (you might have to scroll down to view the new patient), and the patient's bed request is displayed on **Bed Management Worklist**.

To review or enter information on Patient Needs Screen III, click Next > .
Patient Needs Screen III for Direct Admit is displayed. Based on information you entered on the previous two windows, some check boxes might be selected.



Chapter 4 Portal View workflows

Note: The fields that are displayed on the **Patient Needs Screen III** are based on your hospital's configuration and might differ from the boxes on the window.

Direct Admit				
Patient Needs Screen III O O • O				
Last *	Middle			
DOB	Age Gender *	Unknown		
Location				
Positive Pressure Room TTY Phone Bariatric Room Negative Pressure Room	Super Suite Room Low Level Floor Cardiac Monitor Near Nursing Station	 Deluxe Suite Room Ring Fence Bed Required Large wheelchair Private Room 	 ☐ VIP Suite Room ☐ Ceiling Lift ☐ Large bed 	
Personnel				
Companion				
Equipment				
Telemetry Monitor				
Isolation				
Airborne Isolation	Standard Isolation	Contact Isolation	Droplet Isolation < Back Submit Cancel	

Figure 1: Direct Admit: Patient Needs Screen III

- 9. Do one of the following:
 - > If the information is correct and you are ready to submit the request, go to Step 9.
 - If an item applies to the patient, but is not selected (for example, Near Nursing Station), select the check box next to the item, and then go to Step 9.
 - If an item is selected but does not apply to the patient (for example, Near Nursing Station), clear the check box next to the item, and then go to Step 9.
 - > To correct information that was entered on previous windows, click shack until you reach the window with the incorrect information.
 - > Correct the information.
 - When all corrections have been made, scroll down and click Next > until you reach the Patient Needs Screen III.


Assign patients to beds with Ready to Move

10. To submit the request, click Submit

Patient Needs Screen III closes and the bed request for the direct-admit patient is submitted. The new patient information is displayed on **Portal View**.

Assign patients to beds with Ready to Move

To facilitate more precise and timely communication when placing patients in beds, use the Ready to Move feature. When enabled for your organization, this feature integrates Sunrise[™] Clinical Manager and Allscripts[®] Access Manager to visually indicate the patient's readiness to move to a bed.

Before you begin

Verify the Ready to Move feature is enabled and you are assigned to the correct authorization item.

The Ready to Move icon () is unavailable until the patient's admission request is complete and the admission icon () is displayed.

When a patient is ready to be moved to a bed, a green background is displayed on the **Bed Management Worklist** and the **Pending In** section on **Unit View**.

1. From Portal View, click and under Pending Activity.

If an error occurs during communications between programs, an error message indicates that the Ready to Move status could not be updated. The reason for the non-functioning move request is also indicated in the error message. Error messages might include:

Error message	Problem
MRN not provided.	The Medical Record Number (MRN) is null or empty in the patient's record.
Account Number is not provided.	The Account Number was not provided.
FacilityHL7Code not provided.	The FacilityHL7Code not provided.
UnitHL7Code not provided.	The UnitHL7Code is null or empty.
UserName not provided.	The username is null or empty.
Unit does not exist in AM.	The unit does not exist in Access Manager for the given UnitHL7Code.

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Bed Management User Guide

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Error message	Problem
Facility does not exist in AM.	The facility does not exist in Access Manager for the given FacilityHL7Code.
Patient does not exist in AM.	The patient does not exist in Access Manager for the given VisitNumber, MRN, FacilityHL7Code, or UnitHL7Code.

When the move request is successful, the patient row background on Portal View turns green.

Portal View					
Facl/Unit/Pod UN	NV/ED 👻		Q.	CI	1 24
Location	Patient Information		Pending Activity		
UNV ED 58MO			255	TP RD	
UNV ED 58MO		ETA AD 2/27 19:44		9H 🖨	
UNV ED 58MO	2		85 1	TP AD	
I4 4		Pages 1 of 2 Rows 1 - 15 of 25		►	ÞI

After you indicate that the patient is ready to be moved to a bed, that patient is also displayed on **Bed Management Worklist** with a green background. If the patient is not assigned to a bed, they are displayed in the **Bed Control** queue as awaiting a bed or unit reservation, depending upon how your organization reserves beds.

Bed Management	Worklist				
CHD, COM, UNV		•	Q. C.		• 6
Location	Request Information		Assignment		
MED 58MC		R CHD/CVICU/1221-01	Critical Care	•	
CHD-MED-3225-01	and a start of		🔟 Notes 🔇 Edit 😑	Cancel	
ED 58MC		R UNV/CVICU/1118-01	Critical Care	•	
AD R2BD 18H			🔟 Notes 🗳 Edit 🚍	Cancel	
• •		Pages 1 of 2 Rows 1 - 15 of 26		Þ	- •

2. From Bed Management Worklist, select Find Bed.

If necessary, use the applicable filters.



Assign patients to beds with Ready to Move

3. Select a bed and then click **Reserve**.

After you reserve a patient to a bed, that patient is displayed with a green background on **Unit View** in the **Action Required** section.

Action Requi	ired (1)
Reserved to B Est. Time Source Bed	ed - Waiting Acknowledge 4M G F-26y 1/22 09:08 ED 2009-01 Unoccupied
CCIN (MDSG) Dx Sore Thro	at Acknowledge 🍳 Edit 3 Reject 😑 Cancel

4. On the Action Required section, click Acknowledge.

The patient's bed information moves to **Pending Arrival**.

Pending Arrival (1)	*
Reserved to Bed	0M F-26y
Est. Time Source Bed	1/22 09:08 ED 2009-01 Unoccupied
CCIN (MDSG) Dx Sore Throat	
Notes	Arrive 🔍 Edit

5. Click Arrive to indicate the patient is in the bed.

Process Patient Arrival opens.

Process Pat	ient Arrival
The second s	F - 26y
1/31/2018 14:50	e g
Arriving a patient car Proceed with the Arr	
	OK Cancel



6. Select OK to return to the Unit View.

The patient row is no longer green. Also, the patient is removed from **Portal View** and**Bed Management Worklist**, but is displayed as assigned to the bed on **Unit View**.

Request patient transports

Create a transport request for a patient on **Portal View**.

A patient transport requires moving a specific patient to another area (for example, moving a patient from Cardiology to Radiology for a test procedure). A material transport only moves items associated to a patient (for example, medical records, lab specimens, or blood products). These transport types for a patient are configurable and display as options, which can be selected in **Request Type** on **Transport Request**.

The following steps use the example of a **Discharge** transport type. Depending on your organization's setup, transport types vary and might have different fields.

- 1. On **Portal View**, verify that the applicable organization is selected in the **Facl/Unit/Pod** box. If not, select another organization from the list.
- 2. Locate the patient in the list.
- 3. Click 1 in the Pending Activity column.

The Transport Request window opens.

- **4.** For **Request Type**, select a transport type from the list (for example, **Discharge**). Examples of transport requests might include:
 - > Morgue
 - > Test Procedure
 - > Admission
 - > Discharge
 - > Transfer
 - > Equipment
- 5. Click Go.

Transport Request opens and is displayed with fields that are configured for the selected transport type.

Note: The fields that display on **Transport Request** are based on your hospital's configuration and might be different than the fields displayed in this example.



Request patient transports

Patient Information UNV ED 77MO Frame Priority * Request Information Type Discharge Priority * Region UNV Cen Scheduled Appts. 12:00 From * Pick-up Time 9/18/2020 10:36 Not Wheelchair Personnel Transporter Qty 1 Select Qty Versonnel Transporter Versonnel Transporter Versonnel Transporter Versonnel Versonnel Transporter Versonnel Transporter Versonnel Tot Versonnel Transporter Versonnel Transporter Versonnel Transporter Versonnel Versonnel Versonnel Versonnel Versonnel Versonnel
UNV ED 77MO Female 50y Request Information Type Discharge Priority * Routine Stay with job Roundtrip Permanent Move Scheduled Appts. 12:00 1139-01 From * ED-UNV ED Pick-up Time 9/18/2020 10:36 To * Meeds Needs
Type Discharge Priority * Routine Region UNV Cen Stay with job Roundtrip Permanent Move Scheduled Appts. 12:00 1139-01 From * Pick-up Time 9/18/2020 10:36 To * Main Lobby-Main Lobby To Needs HOT Wheelchair
Type Discharge Priority + Routine Region UNV Cen Stay with job Roundtrip Permanent Move Scheduled Appts. 1139-01 12:00 1139-01 From * ED-UNV ED To * Pick-up Time 9/18/2020 10:36 © © Add Needs HOT Wheelchair •
Stay with job Roundtrip Scheduled Appts. 12:00 1139-01 From * Pick-up Time 9/18/2020 10:36 Y Needs HOT Wheelchair
Scheduled Appts. 1139-01 12:00 1139-01 From * ED-UNV ED To * Pick-up Time 9/18/2020 10:36 Imit Obby-Main Lobby Imit Obby-Main Lobby Add Meeds Imit Obby Imit Obby Imit Obby
1200 1139-01 From * ED-UNV ED To * Main Lobby-Main Lobby Pick-up Time 9/18/2020 10:36 Image: Comparison of the state of
From * ED-UNV ED To * Main Lobby-Main Lobby To * Main Lobby-Main Lobby To * Main Lobby To * To * Main Lobby To * To * Main Lobby To * Main Lob
Pick-up Time Add Needs HOT Wheelchair Vor Mar Cody Tear Cody Vor Mar Cody Tear Cody Vor Mar Cody Tear Cody Vor Mar Cody Vor
Pick-up Time Add Needs HOT Wheelchair Vor (Mar 2000) 10:36 Wheelchair Vor (Mar 2000) 10:37 Wheelchair Vor (Mar 2000) 10:37 Wheelchair Vor (Mar 2000) 10:37 Wheelchair Vor (Mar 2000) 10:37 Vor (Mar 2000)
Pick-up Time 9/18/2020 10:36 Im
Needs HOT Wheelchair
HOT Wheelchair
HOT Wheelchair
Equipment Cardiac Monitor Triple Pump
Pump Cardiac Monitor Triple Pump Vent Telemetry Monitor Oxygen
Isolation
Airborne Isolation Droplet Isolation
Requirements
Isolation Male Only Female Only
Non-Ambulatory Nurse Assist Bariatric
Security Escort
Notes

- 6. Under **Request Information**, select values for required fields, which are displayed with an asterisk (*).
 - > **Type**: The request type that you selected. This field cannot be changed.
 - Priority: By default, Routine is displayed. If you do not have the applicable permissions, this field is not displayed.
 - > From and To fields
- 7. Select the type of transport leg.

A *transport leg* is the origin and destination of the patient or material. Options include:

- > Stay with job: Specifies a single transport leg. By default, this value is selected.
- Roundtrip: Specifies that the materials make a round-trip leg. When you select this option, a second row of fields is displayed for From and To.
- > Permanent Move: Indicates that the patient transport is permanent.



- 8. To designate the transport leg duration, complete the following steps:
 - **a.** For **From**, verify the origin location. If necessary, select another value. By default, the current location of the patient is displayed.
 - b. For To, verify the destination location. If necessary, select another value. If the transport type is configured to have a default value for To, then that location displays in this field.
 - c. For Pick-up Time, verify that the date and time are correct.

The system calculates a suitable pick-up time based on your facility's configuration by default. If necessary, update the information. When displayed, use any of these options:

- > Click to select a date.
- > Click is to select a time.
- > Click 🕒 to unlock a field.
- > Click to open **Schedule**, where you can view or change the transport request time.
- Click <a>left to remove a field.
- d. If Roundtrip is selected, enter information into the From and To fields on the second row.
 By default, the transport type's duration is added to the first leg's date and time to calculate the second leg's date and time.
- e. (Optional) To add another transport leg, click Add.
- 9. Enter information into any optional fields.

Click to select values from a list. If you do not have any information to enter in an optional box, leave it blank. Examples of transport request fields are described in the following table.

Field	Action
Region	Select the region for the transport request. If you do not have the applicable permissions, this field is not displayed.
Stay with job	If the transport request is a round-trip, select this box for the transport personnel to stay with the transport job. If this is a material transport for the patient or is not a round-trip, this box is not available (displayed in grey).



Request patient transports

Field	Action
Permanent Move	Select this box if the transport is for a permanent move. If this is a round-trip, this box is not available (displayed in grey).
Scheduled Appts.	Any other scheduled appointments, including a change bed request for the patient, are displayed in this field. If there are none, the field is blank.
МОТ	A Mode of Transport (MOT) might display by default, based on your facility's configuration. To change the MOT, select another value from MOT .
Personnel	Select a personnel value from the list. By default, Transporter is selected.
Qty	Enter the number of personnel in the first Qty field.
Personnel	If necessary, select another personnel value from the second Personnel .
Qty	If necessary, enter the number of personnel in the second Qty field.
Equipment	Select the box next to any Equipment value (for example, Pump or Telemetry Monitor).
Isolation	Select the box next to any Isolation value (for example, Airborne Isolation).
Requirements	Select the box next to any Requirements value (for example, Female Only or Male Only).
Materials	Select the box next to any Materials value (for example, Bed).
(Notes section icon	Enter any information about the transport into the Notes box next to this icon.
Note visible for all users	Select this box to make the note information visible to all users, or clear the box to hide the note from users.
Phone	Enter the phone number for the request.

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10. Click Submit.

Transport Request closes and the patient transport is scheduled. The Portal View displays

the 💷 icon in the patient tile and in the **Pending Activity** column.

If the transport is round-trip or has multiple legs, a round-trip icon displays in the **Pending Activity** column for each transport leg.

Request material transports

Create a transport request for materials on **Portal View**.

A patient transport requires moving a specific patient to another area (for example, moving a patient from Cardiology to Radiology for a test procedure). A material transport only moves items associated to a patient (for example, medical records, lab specimens, or blood products). These transport types for a patient are configurable and display as options, which can be selected in **Request Type** on **Transport Request**.

The following steps use the example of a **Equipment** transport type. Depending on your organization's setup, transport types vary and might have different fields.

- 1. On **Portal View**, verify that the applicable organization is selected in the **Facl/Unit/Pod** box. If not, select another organization from the list.
- 2. Locate the patient in the list.
- 3. Click 1 in the **Pending Activity** column.

The Transport Request window opens.

- 4. For Request Type, select a materials transport type from the list (for example, Equipment).
- 5. Click Go.

Transport Request opens and is displayed with fields that are configured for the selected transport type.

Note: The fields that display on **Transport Request** are based on your hospital's configuration and might be different than the fields displayed in this example.



Request patient transports

insport Request						
Request Informatio	n					
Type Equipment		Priority * Low		Region	UNV Mat	•
Stay with job	Roundtrip					
Scheduled Appts						
From *	CARD-1139-01		- To *			
Pick-up Time	9/18/2020 08:4	15 🔳 🖸				
From *			🗾 🔒 то 4			
Pick-up Time	9/18/2020 08:4	17 🔳 🔯 🗖				
Equipment					Pump	
Cardiac Monitor					Telem	etry Monitor
Isolation						
Airborne Isolati	on				Conta	ct Isolation
Requirements						
Male Only						
lotes						
🖬 Need to u	se COVID-precaut	ions.				
	visible to all users					
Phone						

- Under Request Information, select values for required fields, which are displayed with an asterisk (*).
 - > **Type**: The request type that you selected. This field cannot be changed.
 - Priority: By default, Routine is displayed. If you do not have the applicable permissions, this field is not displayed.
 - > From and To fields
- 7. Select the type of transport leg.

A *transport leg* is the origin and destination of the patient or material. Options include:

- > Stay with job: Specifies a single transport leg. By default, this value is selected.
- Roundtrip: Specifies that the materials make a round-trip leg. When you select this option, a second row of fields is displayed for From and To.
- 8. To designate the transport leg duration, complete the following steps:



- a. For From, verify the origin location. If necessary, select another value.By default, the current location of the patient is displayed.
- b. For To, verify the destination location. If necessary, select another value.
 If the transport type is configured to have a default value for To, then that location displays in this field.
- c. For Pick-up Time, verify that the date and time are correct.

The system calculates a suitable pick-up time based on your facility's configuration by default. If necessary, update the information. When displayed, use any of these options:

- > Click to select a date.
- > Click to select a time.
- > Click 🚨 to unlock a field.
- > Click to open **Schedule**, where you can view or change the transport request time.
- Click <a>left to remove a field.
- **d.** If **Roundtrip** is selected, enter information into the **From** and **To** fields on the second row. By default, the transport type's duration is added to the first leg's date and time to calculate the second leg's date and time.
- e. (Optional) To add another transport leg, click Add.
- 9. Enter information into any optional fields.

Click to select values from a list. If you do not have any information to enter in an optional box, leave it blank. Examples of optional transport request fields are described in the following table.

Field	Action
Region	Select the region for the transport request. If you do not have the applicable permissions, this field is not displayed.
Stay with job	If the transport request is a round-trip, select this box for the transport personnel to stay with the transport job. If this is a material transport for the patient or is not a round-trip, this box is not available (displayed in grey).



Request patient transports

Field	Action
Scheduled Appts.	Any other scheduled appointments, including a change bed request for the patient, are displayed in this field. If there are none, the field is blank.
МОТ	A Mode of Transport (MOT) might display by default, based on your facility's configuration. To change the MOT, select another value from MOT .
Personnel	Select a personnel value from the list. By default, Transporter is selected.
Qty	Enter the number of personnel in the first Qty field.
Personnel	If necessary, select another personnel value from the second Personnel .
Qty	If necessary, enter the number of personnel in the second Qty field.
Equipment	Select the box next to any Equipment value (for example, Pump or Telemetry Monitor).
Isolation	Select the box next to any Isolation value (for example, Airborne Isolation).
Requirements	Select the box next to any Requirements value (for example, Female Only or Male Only).
Materials	Select the box next to any Materials value (for example, Bed).
(Notes section icon	Enter any information about the transport into the Notes box next to this icon.
Note visible for all users	Select this box to make the note information visible to all users, or clear the box to hide the note from users.
Phone	Enter the phone number for the request.

10. Click Submit.



Transport Request closes and the material transport is scheduled. The Portal View displays

the micron in the patient tile and in the Pending Activity column.

If the transport is round-trip or has multiple legs, a real icon displays in the **Pending Activity** column for each transport leg.

Edit transport requests

Edit a transport request for a patient or materials assigned to a patient on **Portal View**.

- 1. In the Bed Management module, access **Portal View** and locate the patient's record.
- 2. Click III on the patient tile or under Pending Activity.
- 3. On the Transport window, click CEdit
- 4. On Transport Request, update any of the required or optional fields.
- 5. To edit the transport leg, complete the following steps:
 - a. For From, select another origin value.
 - **b.** For **To**, select another destination value.
 - c. For Pick-up Time, edit the date and time.

The system calculates a suitable pick-up time based on your facility's configuration by default. If necessary, update the information. When displayed, use any of these options:

- > Click to select a date.
- > Click 🔟 to select a time.
- > Click by to unlock a field.
- > Click 📃 to remove a field.
- d. If Roundtrip is selected, edit information into the From and To fields on the second row. By default, the transport type's duration is added to the first leg's date and time to calculate the second leg's date and time.
- e. (Optional) To add another transport leg, click Add.
- 6. To change the pick–up time on the patient's schedule, complete the following steps:
 - a. Click

The Schedule window opens with the scheduled date and time for the request.



Request patient transports

erval 30		•		
	09/15	09/16	09/17	09/18
all day				
	From HCTC To 0101			
11:00				
12:00				
13:00				
14:00				

- b. To change the date and time of the transport leg on Schedule, complete any of the following actions:
 - > Select a new interval value from **Interval**.
 - > Click and drag the transport leg information to the new date and time.
 - > Click **Next Available Time** to choose the next available time.
- c. Click Save.

Schedule refreshes and the pick-up time changes for the transport request are displayed.

7. After you finish with edits, click Submit.

Transport Request closes and the updated transport request is rescheduled. The Portal View

displays the real icon in the patient tile and the **Pending Activity** column.

If the transport is round-trip or has multiple legs, a round isplays in the **Pending Activity** column for each transport leg.



Request patient transfers

Request a patient transfer from the **Portal View**.

- 1. Verify that the applicable organization is selected in the **Facl/Unit/Pod** box. If not, select another organization from the list.
- 2. Locate the patient in the list.
- 3. On the patient's row, click **m** in **Pending Activity**.

Transfer Request opens on **Patient Details Screen I**. The fields that display on this window are based on your hospital's configuration.

Transfer Request			
Batient Detail	s Screen I 🔎 🔿 🔿		
Last *	Middle		MRN Attending
DOB Dx Intracranial H		Male	Arrival Date
Visit Information			
Dx Facility Care Level Care Service Patient Class Attending Patient Condition Bed Request Priorit Notes	Intracranial Hemorrhage UNV	Est. Time Preferred Unit Unit Selection Reason	4/17 04:44 (spelate [Select] [Select]
Patient Safety			
Disability Security Patient Condition	v [Select]	Confidentiality	Select]
Personal Preference			

Note: Fields displayed in grey are not available for data entry.



Request patient transfers

4. Enter information into all required fields, which are displayed with an asterisk (*).

Click to select values from a list. If you do not have any information to enter in an optional box, leave it blank.

Field	Action
Dx	Select the diagnosis (Dx) for the patient. The diagnosis code is based on your hospital's values.
Facility*	Select facility of the portal, which is displayed as the default value. Depending upon your organization's configuration, this field might not be editable.
Care Level*	Select the patient's care level.
Care Service*	Select the patient's care service.
Patient Class*	Select the patient type. By default, Inpatient is selected.
Attending*	By default, the attending physician's name that is selected at the time of admission is displayed. If necessary, click ^C to search for and select the attending physician's name.
Patient Condition	Select the patient's medical condition.
Bed Request Priority	Select the bed request priority.
Notes	Enter any additional patient note information.
Est. Time	Displays the estimated date and time the patient is to be transferred. By default, the current date and time are displayed. To change the date, click is and select the date. To change the time, click is and select the time.
Preferred Unit	Select a unit for the patient.
Bed Class	Select the bed class applicable to the patient.
Unit Selection*	Based on the care level, you might be able to select the unit. Otherwise, this option is unavailable.
Reason*	Select the reason for the patient transfer.



Field	Action
Patient Mobility	Select a mobility option.
Fall Risk	Select the fall risk option.
Security	Select the applicable security options.
Contact Isolation	Select the applicable contact options.
Droplet Isolation	Select the applicable isolation options.
Chemotherapy	Select the applicable chemotherapy options.
Airborne Isolation	Select the applicable airborne isolation options.
Telemetry	Select this option if the patient must have telemetry monitoring.

- 5. Scroll down and do one of the following:
 - > If more information is needed (for example, the patient requires isolation), go to Step 6.
 - > If no other information is needed, click Submit.

Patient Details Screen I closes and **Portal View** is displayed. The **Transfer** icon (**D**) and a timer is displayed in the patient tile and **Pending Activity** column to indicate that the patient has a pending transfer.

6. Click Next >

Transfer Request opens on **Patient Needs Screen II**. Information that is entered in the first page might trigger a field to be selected on this window (for example, **Private Room**). The fields that are displayed might be different that the boxes that are displayed on the following image.



View pending request details

Transfer	Request									
B Pa	atient Needs Scre	en II	0 • 0							
-										
Last *	(Manager 1)						MRI	N		
First *	Transmitt.			Middle				ending		
DOB	7/26/1997 00:00	Age 2	21y	Gender *	Male		Arri	val Date	5/12 12:30	
Dx	Cardiomyopathy									
Location	n									
Positi	ve Pressure Room		🗆 Su	per Suite Roo	om	Deluxe	Suite Room		VIP Suite Roo	m
	Phone			w Level Floor		🗌 Ring Fe	nce Bed Required		Ceiling Lift	
	tric Room		🗆 Ca	rdiac Monitor	r	Large w			Large bed	
Negat	tive Pressure Room		🗆 Ne	ar Nursing S	tation	Private	Room			
Personn	nel									
Comp	anion									
Equipm	ent									
_	netry Monitor									
Isolatio	n									
🗌 Airbo	rne Isolation		Standa	rd Isolation		Contact 2	Isolation		Droplet Isolation	
									< Back Submit	Cancel

- 7. If applicable, select any box to enter more data.
- 8. Review the information for accuracy and do one of the following:
 - > If the information is correct, go to Step 9.
 - > If the information is incorrect, enter the correct information.

9. Click Submit

Patient Details Screen II closes, and **Portal View** is displayed. The transfer icon (**D**) and a timer is displayed in the patient tile and the **Pending Activity** column to indicate that the patient has a pending transfer.

View pending request details

On **Portal View**, icons display on the patient tile and in the **Pending Activity** column to indicate the type of pending request (such as **M** for pending admissions). Clicking the icon displays some



information for the pending request, which displays more icons to take specific actions, as shown in the following illustration.

Figure 2: Pending Admission Details

Portal View							
Facl/Unit/Pod UNV/ED	/ED 🔹						Q. C 1
IIA 🛛 🖬							
Location	Patient Information					Pending Act	livity
UNV ED 54MO	B				Dr.	AD 🗉 🖳 CVICU1120	01 1D 🚍
AD1D	M-44y 11/2/1974 MRN				ETA AD 11/1.02		RM TP IN
		Pending Admis	sion	0			
		magna, ma		M - 44y	Dr.	AD 🖲 🖳 CARD11390	1D 🚍
		Est. Time	11/1 03:13		ETA AD 11/1 03:1		RM TP III
		Duration	1D				
		Care Level	MDSG		Dr.	AD 🗏 R CCU110401	1D 🚍
		Care Service	GI		ETA AD 11/1 03:1		
		Status	R2BD		211110 21,2 001		RM TP 80
		Assignment			Dr.	AD 🗉 🛛	Jnassigned 1D 😑
			Edit 🤨 Depart	Cancel	ETA AD 11/1 03:1	_	RM TP R0

Change pending requests

Change a pending transport, transfer, admission, or direct admit request for a patient by clicking the associated icon on the patient row, for example, 🔟 for a transfer request, which displays a window with some patient details. Click the action on this window for example, **Lett**.

To cancel a request, you can either click Cancel or you can click the **Cancel** button for that request in the **Pending Activity** column on the patient row. A window then displays to request a reason for the cancellation. Select a reason, click **OK**, and the request is canceled.

The example changes in this procedure are for a patient with a pending discharge request on **Portal View**. You can cancel the discharge, enter changes to discharge information, or complete the discharge for the patient. It is assumed that the applicable organization is selected in the **Facl/Unit/Pod** box.

1. On the specific patient's row of information, click either in the patient tile or the **Pending Activity** column.



Change pending requests

Pending Discharge is displayed.

Figure 3: Pending Discharge Window

Pending Discharge							
Sale Sale		2.00 B					
Est. Time	1/16 23:59						
Duration	5D						
Milestones	1/26						
Disposition	HOME						
Facility							
	😫 Edit 🛛 Depa	rt 😑 Cancel					

- 2. Do one of the following:
 - > To cancel the pending discharge, go to Step 3.
 - > To edit the pending discharge information, go to Step 6.
 - > To depart a patient, go to Step 8.

3. Click Cancel

Cancel is displayed to request confirmation.

Cancel You are about to cancel this Pending Discharge. Are you sure? Reason Reason * Select OK Cancel

Figure 4: Cancel Window

4. Click the **Reason** selection arrow and select a required cancellation reason.

The selected reason displays in the **Reason** box.

5. Click OK.

The pending discharge is canceled, and **Cancel** closes. **Portal View** displays the patient row, and the **Discharge** icon and timer are removed from the patient tile and the **Pending Activity** column.

6. To edit the discharge, click Edit on Pending Discharge.



Pending Discharge for the patient is displayed.

Figure 5: Discharge and Milestones

Discharge and M	lilestones	
6103-01 60MO	Last First Middle MRN	
Discharge Detail	Milestone Status Manage Milestones	
Discharge Date * Discharge Time	4/17/2019 23:59 0 - Or - V Manage Milestones Physician Orders	
Discharge Type *	Home	
Discharge To Discharge Physicia Death Date/Time	n V	
Cause Of Death Notes		
	Depart Update Save and Close 0	

7. Do one of the following:

To change discharge information, enter the changes in the applicable boxes and click Save and Close.

Pending Discharge closes and the information is saved. **Portal View** displays the patient row, and the **Discharge** icon and timer still display in the patient tile and in the **Pending Activity** column.

- To cancel the discharge, click Close. Discharge closes and the discharge is canceled. Portal View displays the patient row, and the Discharge icon and timer are removed from the patient tile and the Pending Activity column.
- > To complete the discharge (removing the pending characteristic), click **Depart**.



Change pending requests

Accept is displayed to request confirmation of the discharge.

Figure 6: Depart Window

			8
Depart			
1139-01 2MO Tx)19D DC)50	Last First Middle MRN		
Discharge Time You are about to o	1/22/2014 discharge	4 15:35 (O) this patient. Are you sure? OK Cancel	

> To confirm the discharge, click **OK**.

Note: When you click, you cannot cancel or make any other changes to the discharge.

Portal View displays the patient row. All patient information is removed from the row, including the **Discharge** icon and timer. The color of the patient tile changes to brown, indicating that the bed is dirty and needs to be cleaned.

8. To depart the discharge, click ¹⁰ Depart on **Pending Discharge**.

Process Patient Departure for the patient is displayed.

	8
Process Patient Departure	
Selected SPEC	-
* 9/17/2011 23:59 🔟 🕥	
Departing a patient cannot be undone. Proceed with the Departure?	
OK C	ancel

Figure 7: Process Patient Departure

- 9. Do one of the following:
 - > To change the date or time, enter the change or click the calendar or time icons and select the date or time. Then click **OK** to proceed with the departure.



Process Patient Departure closes. The patient is departed (even if there was a future date and time displayed), and the patient row is removed from **Portal View**.

> If the date and time are correct, click **OK** to proceed with the departure.

Process Patient Departure closes. The patient is departed (even if there was a future date and time displayed), and the patient row is removed from **Portal View**.

> To cancel the discharge, click **Cancel**.

Process Patient Departure closes. The patient is not departed, and **Portal View** displays the patient row.



Chapter 5 Unit View

Use **Unit View** to respond to bed requests from the **Activity Pane**. View, create, edit, or cancel **Bed Swap**, **Discharge**, **Move**, **Transfer**, and **Housekeeping** requests. View bed details or create bed cleaning requests, or view and change patient details.

To access **Unit View**, click **Bed Management > Unit View** in the left navigation pane.

Unit View		🛑 OCC:72% 🦲 IN:0 🦲 DC:2 🥌 TX:1 🥌 OCC:1	0
Facl/Unit/Pod UNV/CARD	•	Q	T 2 🥪
All Filter			
Location Patient Information		Pending Activity	
0 1139-01		Action Required (0)	¥
1140-01 58MO On	CARD (MDSG)	TP DX DC - Pending Arrival (0)	¥
		Intra-Unit Activity (0)	×
1140-02 58MO On	CARD (MDSG)	TP TK DC - Waiting ADT Activity (0)	

Figure 8: Unit View

Based on your user authorizations, two graphical tools might be available to you. A **Dashboard Screen Header** displays at the top of **Unit View**, which lists the Key Performance Indicators (KPIs).

Click selected unit.

Unit View-dashboard header

Use the dashboard header at the top of **Unit View** to view Key Performance Indicators (KPIs) for facilities and the units or pods within a facility.

Figure 9: Unit View dashboard header



The dashboard header displays individual KPIs for the specific facility, unit, and pod displayed in the **Facility/Unit/Pod** field. The colored oval indicates the status for that KPI. The number to the right of the KPI label indicates a percentage or count (for example, **IN:0** indicates that there are zero incoming requests for that unit). If you select another unit, the KPIs refresh and display the updated data for the unit.



Chapter 5 Unit View

The information in the **Dashboard Header** is configurable by the Allscripts Patient $\operatorname{Flow}^{\mathbb{M}}$ Implementation Team (not by the administration functions in Allscripts Patient $\operatorname{Flow}^{\mathbb{M}}$). Also, security for each KPI is configurable with the **Admin Mode** function for dashboards. For example, security can be configured so that the view of unit information is restricted, but can also be set to bypass to display overall facility information.

The **Unit View** dashboard header contains several types of information as explained in the following table.

Header value	Description		
OCC: % value	When a facility is selected, displays the percentage of the facility's beds that are occupied. The expanded view displays separate charts for OCC: % <i>value</i> by:		
	 Pod: The unit's occupancy percentage by pod Unit: The occupancy percentage by unit for all units that you have access to in this facility Care Service: The unit's occupancy percentage by the patient's Care Service 		
IN: numerical value	Displays the number of pending incoming requests for a bed in the facility's unit. The expanded view displays separate charts for		
	 Pending In by Pod: The unit's number of pending incoming requests by pod Pending In by Unit: The number of pending incoming requests by unit for all units that you have access to in this facility Pending In by Pt Care Service: The unit's number of pending incoming requests by the patient's Care Service 		



Unit View-dashboard header

Header value	Description		
DC: numerical value	The number of discharge workflows that are not canceled, completed, or faulted (for example, a discharge workflow that has a Pending Discharge or an awaiting ADT confirmation status). This view displays the number of pending discharges for the unit. The expanded view displays separate charts for:		
	 Pending DC by Pod: The unit's total number of pending discharges by pod for today Pending DC by Hour: The unit's total number of pending discharges by hour of day since midnight Pending Tx Out by Pod: The unit's total number of pending transfers out by pod for today Pending Tx Out by Hour: The unit's total number of pending transfers out by hour of day since midnight 		
TX: numerical value	Any open transfer workflows where the status is not Arrived or awaiting ADT confirmation (or example, Not Completed). This view shows the number of pending Transfers for the unit. The expanded view displays separate charts for:		
	 Pending Tx Out by Pod: The unit's total number of pending transfers out by pod for today Pending Tx Out by Hour: The unit's total number of pending transfers out by hour of day since midnight Pending DC by Pod: The unit's total number of pending discharges by pod for today Pending DC by Hour: The unit's total number of pending discharges by hour of day since midnight 		
OCC: numerical value	The number of occupied beds in the facility's units or pods.		



Chapter 5 Unit View

View Patient Summary

To view **Patient Summary**, click a patient's name on **Unit View**. The window displays the patient's **Care Service**, **Care Level**, **Attributes**, and **Needs** information.

If necessary, click **Patient Details** to open the **Patient Details** window, where you can view or edit details for the patient.

Unit View			
Facl/Unit/Pod CHD/0	CARDI	•	
🛨 🖃 🛛 All 🔍 Transf	ers		
Location	Patient Informa	ition	
1240-02 59MO	On		CAR
TP 100M	Patient Summary	/	٥
			M - 21y
	Care Service	Cardiology	
1241-01 59MO	Care Level	Med-Surg	
TP5D	Attributes	CDiff,Low,MRSA,VRE	C
_	Needs		
1241-02 59MO			Patient Details
TP5D DC4D	MRN		ETA DC 4

Unit View-activity pane

Use the activity pane on **Unit View** to complete activities related to bed, transfer, or transport requests. For example, swap beds between two patients, request a patient transfer, or change the patient's transport.

Unit View-activity pane request icons

On the **Unit View** activity pane, use the icons related to patient **Transfer**, **Transport**, or **Discharge** requests. If necessary, create a **Bed Swap** or **Change Room/Bed** request.

The following icons display in the **Pending Activity** column of the activity pane:



Unit View-activity pane

Location	Patient Information	Pending	Activity
0114-02 17D On	MRN Dx CHEST PAIN R/O ACS EKG CHANGES	R. Annes Generalises	TP TN DC

- > M: Opens Transfer Request, where you can create a Transfer request for the patient or update the patient's details.
- > TP: Opens Transport Request, where you can create a Transport request for the patient.
- > **I**: Opens **Discharge and Milestones**, where you can create a **Discharge** request or enter patient milestone information.
- Expands the Bed Swap and Change Room/Bed options. Click Bed Swap to open the Bed Swap window, where you can select another patient and submit a Bed Swap request for the patient.

Click **Change Room/Bed** to open **Change Room/Bed**, where you can reassign the patient to another bed location.

If a patient has an incomplete request, the icon for that type of request is unavailable and displays in grey.



Chapter 5 Unit View

Bed Details window

Use the **Bed Details** for a patient to view details such as the bed location, care level, care service, and so on. To access **Bed Details**, click the bed ID in a patient tile.

😑 Bed Details		
ADT ID Care Level Care Service	01 Critical Care Cardiology, Critical Care, Cardiovascular, Thoracic, Vascular	IVR ID Phone Ext. Bed Class A Patient Details
Patient Information Bed Turnover	Bed Closure Attributes	ratericoctais
Name Attending Dx AAA Bed Class A	M 47y 6/8/1968 Admission 5/12	
Attributes		
Patient Safety		
Fall Risk Low		



Unit View-activity pane

😑 Bed Details				
1140-01 14M0 ADT ID Tx2MO Care Level Care Service	01 Med-Surg Cardiology, Cardiovascular		IVR ID Phone Ext.	
Patient Information Bed Turnove	Bed Closure Attributes		Patien	t Details
Name Attending Dx AICD placement		F Admission 5/12		
Attributes				
Financial				
Insurance Medicare				
Patient Safety				
Fall Risk Low				

If the patient is in the bed, the **Patient Information** tab is displayed as the first tab. View details such as the patient's attending physician, attributes, financial, or safety information. Complete other actions from **Bed Details**:

- > Click Patient Details on the Patient Information tab to view patient information.
- > Click the **Bed Turnover** tab to create bed-cleaning requests.
- > Click the **Bed Closure** tab to view the bed status or close a bed.
- Click the Attributes tab to view the bed attributes, such as the patient's gender or equipment associated to the bed.

On **Attributes** users with the Bed Details - Edit Attributes Tab selected on their auth role can select or remove bed attributes as needs change. Saving these changes on **Attributes** also changes the Bed/Room attributes in Admin.



Chapter 5 Unit View

😑 Bed Details			
1240-02 98MO Care Level Care Service	02 Med-Surg Cardiology, Car	diovascular	IVR ID Phone Ext.
Patient Information Bed Turnove	r Bed Closure	Attributes	Patient Details
Room Acuity Adaptable Bedside Monitor Ceiling Lift Dialysis		Bariatric Room Cardiac Monitor Comfort Care Gender Female	*
Bed Cardiac Monitor Large Wheelchair Telemetry Monitor	Å	Large Bed	
			Save Cancel

Change bed locations

From the **Unit View** activity pane, change a patient's current bed or room location to an open bed in the same unit.

Before you begin

Verify the following:

- > The patient does not need an isolation bed.
- > The bed is not occupied by another patient. If so, you can use a bed swap workflow.
- > The patient's unit is selected from **Facility/Unit/Pod**.
- 1. In the Bed Management module, click Unit View.
- 2. Locate the patient and click **e** on the patient's activity pane.

The **Bed Swap** and **Change Room/Bed** options are displayed. If a patient is not eligible for a bed change, the options are not available.

3. Click Change Room/Bed.



Unit View-activity pane

Change Room/Bed opens.

🖹 Change Room/Bed		
1143-02 4MO Name	Serverano, Tradic	
Select Bed		
Select		-
		OK Cancel

- 4. From Select Bed, select a new patient bed.
- 5. Click OK.

The Intra-Unit Activity section displays for the patient.

- 6. To view the new bed location and any available actions, expand the section.
- 7. (Optional) Complete any of the following actions:

> To add notes to the activity request, click

> To indicate that the patient has arrived to the bed location, click Arrive.

The bed location change is completed, and the patient's information is removed from the **Intra-Unit Activity** section. The patient's name displays with the new bed location. Also, the patient tile displays diagonal lines, which indicates that Admission, Discharge, Transfer (ADT) activity is pending. The **The Waiting ADT Activity** section displays the patient's name and WADT.

I Notes

Swap patient beds

From the Unit View activity pane, swap beds between two patients in the same unit.

Before you begin

Verify the following:

- > The unit is selected from Facility/Unit/Pod.
- > Two beds are occupied by patients and in the same unit.
- > Both patients have the same care level selected in the unit.
- 1. In the Bed Management module, click Unit View.



Chapter 5 Unit View

2. Locate the patient and click end on the patient's activity pane.

The **Bed Swap** and **Change Room/Bed** options are displayed. If a patient is not eligible for a bed change, the options are not available.

3. Click Bed Swap.

The **Bed Swap** window displays.

🖹 Bed Swap	
1139-01 50MO Name	Ennigan, Seni
Select Patient	
Select	*
	OK Cancel

4. From Select Patient, select the patient's name with whom to swap the bed.

The selected patient's name displays in the **Select Patient** field.

Note: If another user attempts a bed swap at the same time, an error message indicates that a bed swap or room change is active for the patient.

5. Click OK.

The **Bed Swap** window closes. The **Intra-Unit Activity** section displays the two patients whose beds were swapped.

- 6. Expand the Intra-Unit Activity section to view the bed details and possible options.
- 7. (Optional) Complete any of the following actions:
 - > To add notes to the activity request, click

🖻 Notes

To indicate that the two patients arrived to their new bed locations, click Arrive for each patient.

The bed swap is completed and the information is removed for both patients from the **Intra-Unit Activity** section. The patients' names display in the new bed location, and the patient tiles display diagonal lines, which indicates pending Admission, Discharge, and Transfer (ADT) activity. The **Waiting ADT Activity** section displays the patients' names and WADT.



Unit View-activity pane

Request bed cleanings

From **Bed Details**, request that a patient's bed be cleaned.

1. In the Bed Management module, click **Unit View**.

If necessary, verify that the patient's unit displays in **Facility/Unit/Pod**.

- On the patient's tile, click the bed ID.
 Bed Details is displayed.
- 3. Click the **Bed Turnover** tab.

😑 Bed Details	1				
1241-01 60MO	ADT ID Care Level Care Service	01 Med-Surg Cardiology, Ca	ardiovascular		IVR ID Phone Ext.
Patient Information	Bed Turnover	Bed Closure	Attributes		Patient Details
Bed Turnover					
Clean Type	Select Select Airborne C. Difficile clear Curtain pull Death Clean Isolation MDRO Nursery Radiation Regular Tuberculosis	▼	Clean Priority	Select	Cancel Job Submit

4. For Clean Type, select a bed cleaning job type.

Note: For sequential bed cleaning jobs, such as **UVIsolation**, the second part of the job does not display on the **Bed Turnover Worklist** until the first part is completed. Also, the bed tile does not indicate a clean status (green) until the second part of the sequential cleaning job is complete.

5. For **Clean Priority**, select a cleaning priority value.

You must be assigned to the correct permissions to select values from this list.

6. Click Submit.

The bed cleaning information is saved and **Bed Details** closes. The color of the bed tile on **Unit View** changes to brown, which indicates a dirty bed status.



Chapter 5 Unit View

Change bed statuses to Closed

From **Bed Details**, update a bed status to Closed. For example, a bed repair might need to be moved to a Closed status.

Before you begin

Verify that other bed statuses are cancelled before you change the bed status to Closed (for example, a Dirty,

- 1. In the Bed Management module, click **Unit View**.
 - If necessary, verify that the patient's unit displays in Facility/Unit/Pod.
- 2. On the patient's tile, click the bed ID. Bed Details is displayed.
- 3. Click the Bed Closure tab.
- 4. From Closed Bed Reason select a reason that explains why you are closing the bed job.
- (Optional) To change the default current date or time to start the bed closure, enter the change in Closed Bed Timeframe Start.

If necessary, click the calendar or clock to select a start date and time.

6. Enter the end date or time in Closed Bed Timeframe End.

If necessary, click the calendar or clock to select an end date and time.

The End date and time must be later than the Start date or time.

7. Click Schedule Close.

The information is saved and **Bed Status** closes. When the date and time for the scheduled close is reached, the color of the patient tile on **Unit View** changes to black and displays the **ADT ID** reason for the closed bed status.

If the bed is occupied at the scheduled time of the bed close, the bed closes when the patient has departed the bed.

View transfer information

To view information for patient transfers on **Unit View**, click **I** for a patient under the **Pending Activity** column.

Note: The Transfer Center module must be enabled for your organization. Otherwise, the information is not available.



Unit View-activity pane

Request patient transfers

From Unit View, submit a transfer request for a patient.

Before you begin

Verify that your organization is enabled for the Transfer module and the transfer icon (**M**) displays in the patient's record.

- 1. In the Bed Management module, click Unit View.
- 2. Locate the patient in the list.

If necessary, verify that the patient's unit displays in **Facility/Unit/Pod**. If not, select the correct unit.

3. Click 🚾 under Pending Activity.

Transfer Request opens on **Patient Details Screen I**. The fields that display on this window are based on your hospital's configuration.

Note: Fields displayed in grey are not available, and you cannot enter information into these fields.

- Verify or update information in all required or optional fields on Patient Details Screen I. Required fields are displayed with an asterisk (*). If you don't have information entered into a required field and click Next or Submit, a warning icon (19) displays.
- 5. If more information is needed for the patient transfer, click Next.

Patient Needs Screens II opens, where you can enter details such as equipment or isolation needs for the patient.

Information that you enter in **Patient Details Screen I** might trigger a field on **Patient Needs Screens II** (for example, **Private Room**). Also, the fields on this window might vary.

 After you enter the necessary transfer request information on Patient Details Screen I or Patient Needs Screens II, click Submit.

Unit View is displayed, and the transfer icon changes to $\overline{\mathbb{W}}$, which indicates that a transfer request was submitted. Also, a timer is displayed in the patient tile and the **Pending Activity** column to indicate that the patient has a pending transfer.



Chapter 5 Unit View

Change pending Transport, Transfer, or Discharge requests

Change a pending transport, transfer, or discharge request for a patient by clicking the associated icon on the patient row.

For example, click some patient details and enables you to select an action. Click the applicable action (for example, Select). To cancel a request, click cancel on this window or click **Cancel** for that request in **Pending Activity** on the patient row. A page is displayed to select a reason for the cancellation. Click ok to cancel the request.

The example changes in this procedure are for a patient with a pending discharge request in **Unit View**. On **Facl/Unit/Pod**, select the applicable unit and then one of the following actions:

- > Cancel the discharge
- > Edit discharge information
- > Complete the discharge
- > Depart the patient


Unit View-activity pane

1. On the patient row, click in the **Patient Tile** or **Pending Activity**, and select the applicable action from the patient window.

6103-01 60MO La	st and a state of the state of	
6103-01 60MO La		
0	ddle	
м	IN IIIII	
Discharge Detail Mik	stone Status / Manage Milestones /	
ischarge Date *	4/17/2019	-
ischarge Time	23:59 (O) - Or -	·
	Manage Milestones Physician Orders	
ischarge Type *	Home	
ischarge To	· · · · · · · · · · · · · · · · · · ·	
ischarge Physician	(m. 1999)	
eath Date/Time	T O	
ause Of Death		
iotes		

Figure 10: Discharge and Milestones

- 2. Do one of the following:
 - > To cancel the pending discharge, go to Step 3.
 - > To depart the patient, go to Step 6.
 - > To edit the pending discharge information, go to Step 9.
- 3. Click Cancel.

	_	×
. c	ancel	
You are at you sure?	bout to cancel this Pending Discharge. Are	
Reason		
Reason *	Select 🗾	
	OK Cano	el

Figure 11: Cancel



- 4. Select a cancellation reason.
- 5. Click OK.

The pending discharge is cancelled, and **Cancel** closes. **Unit View** displays the patient row, and **e** and timer are removed from the **Patient Tile** and **Pending Activity**.

6. Click ^{O Depart}

Discharge and M	stones	
6103-01 60MO C 14H	ist contraction of the second se	
Discharge Detail	estone Status Manage Milestones	
Discharge Date * Discharge Time	4/17/2019 23:59 0 - Or - Manage Milestones Physician Orders	
Discharge Type *	Home	
Discharge To		
Discharge Physicia	Lan. Henne	
Death Date/Time		
Cause Of Death Notes]

Figure 12: Discharge and Milestones

7. Click Depart.

Figure 13: Depart

		×
🔂 Depart		
6103-01 60MO	Last First Middle MRN	
	4/17/2019 09:48 💮 🖄 depart the patient. Are you sure? OK Cancel	

8. Click OK to confirm that you want to discharge the patient.



Unit View-activity pane

Process Patient Departure closes and the patient is departed. Unit View displays the patient

row. All patient information is removed from the row, including e and timer. The **Patient Tile** color changes to brown, indicating that the bed is dirty and needs to be cleaned.

9. To edit discharge information on the **Details** tab, enter or select the changes in the applicable boxes, which are explained in the following table.

Data	Purpose
Discharge Date*	The date of the pending discharge is displayed by default. To change the date, click (Calendar popup) and select a date.
Discharge Time	The time of the discharge. Enter the time or click (time view popup tool) and select the time. To enter a general time, select Morning , Evening , or Afternoon . Note: You cannot select a time in the future to discharge a patient.
Discharge Type*	The type of discharge.
Discharge To	This box is available only for certain Discharge Type options. If applicable, select the location from where the patient is discharged.
Discharge Physician	The name of the discharge physician. You can start entering the physician's name to narrow the list of available options.
Death Date/Time	The exact month, day, and year that death occurred. The exact time of death, according to local time.
Cause of Death	The reason that resulted in death.
Manage Milestones	Manage milestones for the discharge. The Manage Milestones tab is displayed after you click <u>Pending</u> .
Physician Orders	Select if the discharge is under physician orders.
Notes	Enter any notes associated with the discharge.



Data	Purpose
	If this box is selected (default), any notes are visible for all users. Clear the box to make the note private.

10. Click Save

Pending Discharge closes and the information is saved. **Unit View** displays the patient row, and the **left** icon and timer are still displayed in the **Patient Tile** and in **Pending Activity**.

Request a patient transport or a material transport for a patient

Requesting a patient transport or a material transport for a patient using **Unit View** is similar to requesting it using **Portal View**.



Request a pending discharge for a patient

A request for a pending patient discharge using **Unit View** is similar to a **Portal View** request.

1. On a patient row of information, click log in the **Patient Tile** or in **Pending Activity**.

Discharge and Mile	estones	
5201-01 57m0	ast irst iiddle iRN	
Discharge Detail Mi	lestone Status V Manage Milestones	_
Discharge Date * Discharge Time	5/27/2022 IIII	
Discharge Type *	[Select]	
Discharge To	· · · · · · · · · · · · · · · · · · ·	
Discharge Physician		
Death Date/Time		
Cause Of Death Notes		
	✓ Note visible to all users 🔹	
	Pending Depart Clo	se

Figure 14: Discharge and Milestones

2. Select Discharge Time, Discharge Type, Discharge Physician, Death Date/Time (if applicable) and enter any Notes.

You can start entering the physician's name in **Discharge Physician** to reduce the list of available physicians to select.

3. Click Pending.



Functions associated with a Bed ID

Clicking **Bed ID** on a patient tile icon displays **Bed Details**. If the bed is occupied by a patient, the **Patient Information**, **Status**, and **Attributes** tabs display. If a bed is occupied by a patient, the **Patient Information**, **Bed Turnover**, **Bed Closure**, and **Attributes** tabs display. If a bed is not occupied only the **Bed Turnover**, **Bed Closure**, and **Attributes** tabs display.

Functions associated with the On/Off Floor indicator

The On/Off Floor indicator on the right of the Patient Tile icon shows whether the patient is actually in the assigned bed or is in another location. If **On** displays, then the patient is in the assigned bed. If another location displays, for example, RAD for Radiation, then the patient is in that off-floor location and not in the assigned bed. The following procedures explain how to move a patient off the floor to another location and then to return the patient back on the floor to the assigned bed.

If a Transfer Request exists for the patient, as indicated by the Transfer icon \bigcirc or \bigcirc in the Pending Activity column, and you are moving the patient to a location (organization) available on the Portal View, then you have the option of releasing the bed automatically when you move the patient off floor.

Move a patient off floor

To move a patient from the assigned bed to another location off floor, follow the procedure following. It is assumed that the appropriate unit is selected in the **Unit** box.

1. Navigate to the specific patient's row of information.

If the patient is in the assigned bed, **On** displays on the right of the patient tile icon.

Location	Patient Information	Pending Activity
1101-01 4800 On TP/SD	F - MRN DX AM	CARD (CCRE)

Figure 15: Patient Information Window

2. Click **On** to the right of the patient tile icon.



Unit View-activity pane

Move Patient Off Floor is displayed.

		8
Move Patient Off Floor		
Please select the patient's current location	below.	
Location		·
Off Floor Date Time	3/25/2014 16:39	O
Estimated Arrival Back Date Time		O
		OK Cancel

Figure 16: Move Patient Off Floor

3. Click Location to select the off-floor location.

The name of the off-floor location displays in the **Location** box. To change the default current date and time to begin the off-floor activity, enter the change in the **Off Floor Date Time** box. Alternatively, you can click the calendar icon and select a date and the time icon and select a time.

The date and time display in the **Off Floor Date Time** box.

4. Click the time icon on the **Estimated Arrival Back Date Time** box and select a time. The time must be later than the off floor date and time.

The selected time and the current date display in the **Estimated Arrival Back Date Time** box. If the current date is not correct, you can enter the date or click the calendar icon and select a date.

5. Click OK.



Move Patient Off Floor closes. The abbreviation for the off-floor location, for example, RAD, displays next to the patient tile icon as shown in the following figure. The time when the patient is expected to return is displayed in the following figure of off-floor location.

Figure 17: Patient Information Window

Location	Patient Information	Pending Activity	
1101-01 4800 RAD TPS0 7250	0 F - 87y minimum MRN	CARD (CORE)	50 🛢

Figure 18: Move Patient Off Floor

R 1141-01 14MO ED	다 F - 82y 10/8/1932 MRN Dy Blateral Carolid Stenosis	CARD (MDSG) Bed (Tass Senorday 2	₩ ■	8D 🖨
	Dx Bilateral Carotid Stenosis	Bed Class Secondary 2		

Move a patient back on floor

To move a patient from the off-floor location back to the assigned bed on the floor, perform the following procedure. If the patient was moved off floor to a Facl/Unit/Pod location on **Portal View**, then the patient cannot be moved back on the floor using this procedure. It is assumed that the applicable unit is selected in the **Unit** box.

1. Navigate to the specific patient's row of information.

If the patient is off the floor, the abbreviation for the off-floor location displays next to the patient tile icon.

Figure 19: Patient On Floor

Location	Patient Information	Pending Activity
1101-01 4800 On TP 50	6 F	CARD (CCRE)

Figure 20: Patient On Floor

ED F - 82y 10/8/1932 T07ro MRN Dx Blateral Carolid Stenosis	CARD (MDSG)	TP 5 00 0
---	-------------	-----------

2. Click the abbreviation for the off-floor location, for example, RAD.



Unit View-unit activity sections

Move Patient On Floor opens, requesting you confirm the move of the patient.

Figure 21: Move Patient On Floor

	8
Move Patient On Floor	
You are about to place this patient in the curre	ntly selected bed location. Are you sure?
Off Floor Date Time	3/25 16:47
Estimated Arrival Back Date Time	3/25 18:00
	OK Cancel

3. Click OK

Move Patient Off Floor, and **On** displays next to the patient tile icon to indicate that the patient is back on the floor in the assigned bed location.

Figure 22: Patient Information

Location	Patient Information			Pending Activity		
1101-01 4	MO On F-87y MRN 4		CARD (CCRE)	(TP)	318 IK	SD 🛢
L		Figure 23: Patient Information				1
R 1141-01 14MO TP7D	Pa F - 82v 10/8/1932 MRN Dx Bilateral Carotid Stenosis		CARD (M Bed Class Second	IDSG)	TP	8D 🖨

Unit View-unit activity sections

Unit View is the only page that displays a unit activity section. Use these sections to view patient activities for the selected unit in the **Facl/Unit/Pod** list.

Four types of activities are tracked in the unit activity sections, which include:

- > Action Required
- > Pending Arrival
- > Intra-Unit Activity
- > Waiting ADT Activity



If any of these types of activities are pending, the section expands slightly to display the patient's name and a few other details. The number of each activity type is displayed in parentheses on the right of the section heading.

The following image displays an example of the **Waiting ADT Activity** section, in which three activities are pending.

Waiting ADT A	ctivity (3)	*
DC 1240-01	, Bradley	WADT
DC 1245-01	; Alyssa	WADT
DC 1245-02), Carly	WADT

If the activity section is in the collapsed view, click *to expand the view or click* to collapse the view and hide the details.

To view or take action on activity information, click the available options in the window. For example, the following image demonstrates the **Pending Arrival** section with the **Notes**, **Arrive**, **Edit**, and **Cancel** options enabled.

	Pending Arrival (1	L) 🔗
	Reserved to Bed Est. Time Source Bed B2 / B2 Dx 1	0M F-37y 1/15 11:34 07-28B2M Unoccupied
	D Note	S Afrive C Edit
Pe	nding Arrival (1))
	inding runnan (12)) ^
Es So Be	t. Time	1MO F-68y 2/10 11:13 MED 3125-01 Unoccupied



Unit View-unit activity sections

Action Required section

Use the Action Required section on Unit View to respond to a Bed Reservation request.

Your hospital can configure bed reservation requests that bypass the **Action Required** section and instead display directly on the **Pending Arrival** section.

When patient information displays in this section, expand the section and display the possible responses to the bed reservation. Response options include:

- Acknowledge
- > 🛛 Edit
- S Reject
- Cancel

Acknowledge bed requests

From the Action Required section, acknowledge a bed request.

- 1. On the Bed Management module, click Unit View.
- 2. Expand the Action Required section.

The section expands and displays the available actions.



Action Requ	lired (1)
Reserved to E	ed - Waiting Acknowledge 0M F-37v
Est. Time Source	1/15 11:34
Bed B2 / B2	07-28B2M Unoccupied
Dx j	
Motes	S Acknowledge C Edit





3. To acknowledge the bed request for the patient, click Acknowledge.

The bed request is acknowledged and the patient information moves to the **Pending Arrival** section.

Change bed assignments

From the Action Required section, change a patient's bed assignment.

These steps assume that the patient is assigned to a bed.

- 1. In the Bed Management module, click **Unit View**.
- 2. Expand the Action Required section.
- 3. Click Edit.

Bed Assignment opens and is displayed with a list of available beds. The bed identifier includes the unit, room, and bed location.



Unit View-unit activity sections

Bed Assignment				
Patient				M- 65y
Bed Assignment				
Select		-		
ICCU112601		~		
ICCU112701	00			
ICCU112702	T×			
ICCU112801				
ICCU113301				
ICCU113601				
ICCU113602		Ť	Assign	Cancel

4. To select a different bed, expand the **Select** list and choose another bed.

The different bed assignments, including those with a discharge or transfer (outbound) workflow, display in the **Bed Assignment** field.

5. Click Assign.

Bed Assignment closes. The patient's new bed assignment displays in **Action Required**, as demonstrated in the following image.



6. Expand the section and verify that the bed assignment for the patient is changed.





Reject bed reservations

From the Action Required section, reject a patient's bed reservation.

These steps assume that a bed request is in progress.

- 1. In the Bed Management module, click Unit View.
- 2. Expand the Action Required section.

Action Required (1)	
Reserved to Bed - Walting Acknowledge Est. Time 2/11 11 Source MD Off Bed 1145-01 Unoccup CARD (MDSG) Dx Broken Shell III Notes Acknowledge Edi Reject Cance	:19 fice ied

- 3. To reject the patient's bed reservation, click **Reject**.
- On the Reject window, select a reason for the bed reservation rejection. The rejection reason displays in the Reason field.
- 5. Click OK.

Reject closes, and the bed reservation is rejected. The bed information is removed from the **Action Required** section. Also, the patient displays in the **Bed Management Worklist** without a bed reservation.



Pending Arrival section

Use the **Pending Arrival** section on **Unit View** to specify that the patient has arrived to their assigned bed, or to update or cancel the bed reservation. If necessary, add notes to the bed request.

Pending Arrival (1) *
Reserved to Bed	OM
- G	F-37y
Est. Time	1/15 11:34
Source	Johnsteines
Bed	07-28B2M Unoccupied
B2 / B2 Dx 1	
III Note	es 🖾 Arkjve 🔍 Edit

Expand the **Pending Arrival** section to display the following options:

- > 📴 Notes
- > 🗹 Arrive
- > 🛛 Edit
- Cancel

Manage pending arrivals

On the **Pending Arrival** section on **Unit View**, specify that the patient has arrived to their assigned bed, update the bed request, or cancel the bed reservation. If necessary, add notes to the bed request.

- 1. On the Bed Management module, click Unit View.
- 2. Expand the Pending Arrival section.



The row expands and displays the available actions, as demonstrated in the following image.

Pending Arriva	(1) 🔹
Reserved to Bed	M
Est. Time	F-37y 1/15 11:34
Source Bed	07-28B2M Unoccupied
B2 / B2 Dx	
II N	otes An <u>rive</u> Cancel

Figure 25: Pending Arrival

Figure 26: Pending Arrival

Pending Arrival (1) *
Reserved to Bed	5M
Est. Time SICU (MDSR) Dx Broken foot	9/20 06:52
Source	DA
Bed	0104-01 Unoccupied
Arrive	📽 Edit 🗧 Cancel

- 3. (Optional) If necessary, use any of the optional actions:
 - > To add notes to the bed reservation, click en Notes.
 - > To edit the bed reservation, click Sedit.
 - > To cancel the bed reservation, click Cancel.
- 4. To specify that the patient has arrived to their assigned bed location, click Arrive.
 Process Patient Arrival opens with a confirmation message.



Unit View-unit activity sections



- (Optional) If necessary, click the calendar or clock icons to update the date and time of the arrival.
- 6. Click OK.

The patient is designated as arrived to the bed assignment, and the information is removed from the **Pending Arrival** section. The updated information moves to the bed location on **Unit View** and displays in the patient list. The patient information also displays in the **Waiting ADT Activity** section.

Cancel bed reservations

- 1. On the Bed Management module, click Unit View.
- 2. Expand the Pending Arrival section.
- 3. To cancel the bed reservation for the patient, click Cancel.

The Cancel window opens, where you must select a reason to cancel the reservation.

Cancel	
You are about to cancel this Bed F sure?	Reservation. Are you
Reason	
* Select	-
	OK Cancel

- From Reason, select a reason that explains why you are canceling the bed reservation. The reason displays in the Reason field.
- 5. Click OK.



The bed reservation is cancelled. The patient's information moves from the **Pending Arrival** section to the **Action Required** section, where the patient is reserved to unit, but not to a specific bed. At this point, the bed request can be cancelled or a different bed can be assigned.

Intra-Unit Activity section

Use the Intra-Unit Activity section on Unit View to view and manage Change Room/Bed (Move) or Bed Swap request activities.

A patient's information displays in **Intra-Unit Activity** only when a **Change Room/Bed (Move)** request or **Bed Swap** request is active.

Expand the section to display the response options to the bed request. Complete any of the following options:

- Click Arrive to change the patient to arrived for a Change Room/Bed (Move) request. One patient displays in the Intra-Unit Activity section for the request.
- Click Arrive to change the patient to arrived for a Bed Swap request. Two patients display in the Intra-Unit Activity section for the Bed Swap request.
- > Click Cancel to cancel any Change Room/Bed (Move) or Bed Swap request activities.

When a **Change Room/Bed (Move)** or **Bed Swap** activity is completed, the **Waiting ADT Activity** section displays the patient information (one patient for a **Change Room/Bed (Move)** and two patients for **Bed Swap**) as **Direct Admit** activity. Diagonal lines display at the top the patient tile, which indicates that an Admission, Discharge, Transfer (ADT) activity is pending.

Arrive patients to beds

From the **Intra-Unit Activity** section on **Unit View**, indicate that a patient has arrived to their bed location assignment.

These steps assume that the patient is assigned to a bed location and a **Change Room/Bed** (Move) request is active.

- 1. In the Bed Management module, click **Unit View**.
- 2. Expand the Intra-Unit Activity section.

The row expands and displays the available actions. For a **Change Room/Bed (Move)** request, the section displays as demonstrated in the following image.



Unit View-unit activity sections

Intra-Unit Ac	tivity (1) 🔗
Status Bed	OPEN 0:00 0110-02 Open
	🖾 Arrive 🗧 Cancel

3. Click Arrive

The **Change Room/Bed (Move)** request completes, and the updated information displays on **Unit View**. The patient's information is reassigned to the new bed location and removed from the **Intra-Unit Activity** section.

The **Waiting ADT Activity** section displays the patient information as a **Direct Admit** activity. Diagonal lines display on the patient's tile, which indicates that an Admission, Discharge, Transfer (ADT) activity is pending.

Arrive patients for bed swaps

From the **Intra-Unit Activity** section on **Unit View**, indicate that the patients have arrived to their new beds after a bed swap.

These steps assume that two patients are assigned to beds and a **Bed Swap** request is active.

- 1. On the Bed Management module, click Unit View.
- 2. Expand the Intra-Unit Activity section.

The row expands and displays the available actions. For a **Bed Swap** request, the section displays both patients as demonstrated in the following image.

Intra-Unit Ac	Intra-Unit Activity (2) 🔗					
Status Bed	OPEN 0:00 0208-01 Open					
	🖾 Arrive 🗧 Cancel					
Status Bed	OPEN 0:00 0212-01 Open					
	🖾 Arrive 🗧 Cancel					

3. Click Arrive for each patient.

The **Bed Request** request completes, the patient information is removed from **Intra-Unit Activity**, and the updated information displays on **Unit View**.



The **Waiting ADT Activity** section displays the information for both patients on as a **Direct Admit** activity. Diagonal lines display in the patient tile of both patients, which indicates that an Admission, Discharge, Transfer (ADT) activity is pending.

For a **Bed Swap** activity, **Unit View** displays the two patients in the new bed locations as demonstrated in the following image.

Location	Patient Information	P	ending Activity		»
0208-01 17D On	225	.72.	35 35 BC 00	î	Action Required (0)
Q 0210-01	a manage	-			Pending Arrival (0)
					Intra-Unit Activity (0)
0211-01 1MO LL2		.25		Π	Waiting ADT Activity (2)
0212-01 21D On	All and a set		18 X K 🖬		6

Cancel Change Room/Bed (Move) or Bed Swap requests

From the **Intra-Unit Activity** section on **Unit View**, cancel a request for a bed location change or cancel a request for two patients to swap beds.

These steps assume that a Change Room/Bed (Move) or Bed Swap request is active.

- 1. In the Bed Management module, click Unit View.
- 2. Expand the Intra-Unit Activity section.
- 3. Click inside a specific patient row, but not the patient's name, to expand the row.

The row expands and displays the available actions. For a **Change Room/Bed (Move)** request, only one patient is displayed. For a **Bed Swap** request, the two patients to swap rooms or beds are displayed.

4. To cancel the request:

You can only click Cancel one time for one patient, irregardless of the request type.

- > For a **Change Room/Bed (Move)** request, click Cancel for the patient.
- > For a **Bed Swap** request, click Cancel for each patient.

The **Cancel** window opens, where you must select a reason to cancel the request.



Unit View-unit activity sections

	8
Cancel	
You are about to cancel this Move/Sw you sure?	ap request. Are
Reason	
* Select	
L	OK Cancel

- 5. For **Reason**, select a value from the list.
- 6. Click **OK**.

The **Change Room/Bed (Move)** or **Bed Swap** request is cancelled. The information for the patient is removed from the **Intra–Unit Activity** section, and the patient remains in the current bed location.

Waiting ADT Activity section

Use the view-only **Waiting ADT Activity** section on **Unit View** to monitor recent patient activities that were completed by Allscripts Patient Flow[™], but are not yet processed in the hospital's Admission, Discharge, Transfer (ADT) system.

When a patient has a pending ADT activity, diagonal lines display on a patient's tile. When the patient's ADT activities are completed, the diagonal lines are removed and the patient's information is removed from the **Waiting ADT Activity** section. The following image displays the **Waiting ADT Activity** section and pending ADT activity on the patient's tile.

Location	Patient Information	Pending Activity	»
0103-01 2MO On	Provide and a s	2010 DE DE DE	Action Required (0)
	and the second second		Pending Arrival (0)
0103-02 50]		Intra-Unit Activity (0)
0104-01 On	SI	CU (MDSR) 116 106 106 10	Waiting ADT Activity (1)
	Dx Broken foot		◎



1142-01 14MO On	F - 36y 4/25/1979 MRN 2 Dx Chest Pain	CARD (MDSG)		TP TX DC	 Waiting ADT Activity (4)	© WADT
1142-02 14MO On	F - 82y 8/9/1932 MRN Dx Chest Pain	CARD (MDSG)		TP TX DC	em 1141-01 em 1142-01	WADT WADT
1143-01 14MO On DC 2MO	전 M - 89y 10/7/1925 MRN Dx Chest Pain	CARD (MDSG) ETA DC 5/27 17:40 Bed Class Advanced	like (□ ⁺ 0:26	2MO 🖨	PM 1142-02	WADT

Floor Plan

The **Floor Plan** displays the rooms and bed locations of a specified unit in a bird's-eye or overhead view, enabling you to view the rooms and beds in a more graphical way, similar to an architectural diagram.

The **Patient Tiles** on **Floor Plan** display the bed locations and occupancy or availability of the beds.

You can access the Floor Plan by clicking Floor Plan on the left navigation pane or by clicking

Kernet (Floor Plan) from the **Unit View**, For optimal viewing, use a large monitor.

Note: You can return to **Unit View** from **Floor Plan** by clicking (Unit View) or by clicking **Unit View** from the left navigation pane.

Use the Floor Plan's functions

This section describes the functions you can perform from Floor Plan.

The following procedures assume **Floor Plan** is displayed. Prior to starting these procedures, you must click **Facl/Unit/Pod** on **Floor Plan** and select the applicable unit to display the unit's **Floor Plan**.



Floor Plan

Use the Manual Scale function

The Manual Scale function enables you to resize the Floor Plan manually.

1. Access the Floor Plan by clicking Floor Plan from the left navigation pane or by clicking (Floor Plan) on Unit View.

Floor Plan	🛑 OCC : 79% 🥌 IN : 0 📢	🔵 DC : 0 🗲	TX:0 🔵	OCC : 16	
Facl/Unit/Pod CHD/NEURO	📜 🖶 Scale:			🇉 🗗 i	4
Ly.					

Figure 27: Floor Plan Window

2. To resize the Floor Plan, click 🖭 (Manual Scale).

The page changes scale slightly, and the Manual Scale is available. You can click and drag

scale: to the right to increase room size and decrease the number of beds displayed or to the left to decrease room size and increase the number of beds displayed. Depending on the scale, scroll bars might be displayed. Use these scroll bars to move around the **Floor Plan** and view different beds.

3. To exit the Manual Scale feature and reset the scale back to its original setting, click 🖭 (Best Fit).



Use the View options

You can change the **Floor Plan** view by selecting or clearing **View Options**. Selecting **View Options** displays all room attributes and patient indicators on the **Floor Plan**.

1. Click 📃 (View Options) at the top right of Floor Plan.

View Options becomes enabled and displays all room attributes and patient indicators.

Use the Legend function

You can use the Legend function on **Floor Plan** to view beds with specific statuses, rooms with specific attributes, or patient indicators.

1. Click (Legend) in Floor Plan.



Floor Plan

The Legend panes (for example, Bed Status) is displayed.

Figure 28: Bed Status and Room Attributes



- 2. Do one of the following:
 - > To view beds with a specific status, click the status in **Bed Status**.
 - > To view rooms with a specific room attribute, click the attribute in **Room Attributes**.
 - > To view patients with a specific status, click the attribute in **Patient Indicators**.



If any rooms have that status, for example, Positive Pressure, the rooms with that bed status are highlighted.



Figure 29: Floor Plan View



Floor Plan

4. To collapse a pane, click on the top right of the specific pane, for example, Room Attributes. This action expands other panes (for example, Bed Status) to view more available options.



Figure 30: Bed Status Colors

Use the Workflows function

The Workflows function enables you to view patients in the **Acknowledge**, **Pending Arrival**, and **Intra–Unit Activity**, and **Waiting ADT Activity** panes.

1. Click (Workflows button) on Floor Plan.



Acknowledge, Pending Arrival, and Intra–Unit Activity, and Waiting ADT Activity display on the right of the Floor Plan page. Any activity in the panes is shown.

Floor Plan		🛑 OCC : 78% 🥌 IN : 0 🥌 DC : 0 🥌 TX : 0 🥌 OCC : 9
Fact/Unit/Pod CHD/CARDI	• 🗙 🖶 Scaler	
		Action Required (0)
		Pending Arrival (0)
		Intra-Unit Activity (0)
		Waiting ADT Activity (0)

Figure 31: Floor Plan Window

2. To view more details, click the patient's row.

The patient's row expands to show more details.

Figure 32: Intra–Unit Activity

Intra-Unit Activity(2)	×
OPEN Est. Time	-
CHF PLEURAL EFFUSION 01AB 0111-01 (Open)	
OPEN Est. Time	-

3. To perform an action for the patient, click the applicable button at the bottom of the pane, for example, Arrive.



Floor Plan

What happens next depends on the action taken. If Arrive was clicked, the patient arrives in the applicable bed. Then **Waiting ADT Activity** displays the patient's activity.

Figure 33: Waiting ADT Activity

Waiting ADT Activity(1)	*
DA 3117- 01	

View the Bed or Patient details

You can click the bed ID in the patient tile to view more details. If a bed is unoccupied, **Bed Details** displays information about the bed; if a bed is occupied, **Bed Details** also displays information about the patient.

1. To view details, click the bed ID on the patient tile.



If the bed is unoccupied, **Bed Details** is displayed. The **Bed Turnover**, **Bed Closure**, **Attributes** tabs are displayed.

Bed Details							
1117-01	ADT ID Care Level	01 Critical Care				IVR ID Phone Ext.	
	Care Service	Cardiology, C	Critical Care, Cardiovas	cular, Thoracic, Vasci	ular	Bed Class A	
Bed Turnover Be	ed Closure Attri	butes Requ	uests			Patient Details	
Bed Turnover							
Clean Type	Select		Clean Priority	Select	Cancel Jo	ab Submit	

Figure 34: Bed Details Window

Figure 35: Bed Details Window

😑 Bed Details	;			
1143-02	ADT ID Care Level Care Service	02 Med-Surg Cardiology, Cardiovascular		IVR ID Phone Ext.
	ed Closure \ Attr	ibutes		Patient Details
Bed Turnover Clean Type	Select	Clean Priority	Select	rcel Job Submit

If the bed is occupied, **Bed Details** is displayed. The **Patient Information** tab displays the patient's name, age, date of birth. **Bed Turnover**, **Bed Closure**, **Attributes** tab is displayed.



Floor Plan

The view-only **Attributes** tab displays the room's attributes. Clicking **Patient Details** Patient Details displays **Patient Details**.

		8
😑 Bed Details		
1122-01 13MO ADT ID Care Level Care Service	01 Critical Care Cardiology, Critical Care, Cardiovascular, Thoracic, Vascular	IVR ID Phone Ext. Bed Class B
Patient Information Bed Turnover	Bed Closure Attributes Requests	Patient Details
Name Attending Dx CABG Bed Class B2	F 84y 9/27/1930 Admission 5/12	
Attributes		
Financial		E
Insurance Medicare		
Isolation		
Contact Isolation MRSA		
Patient Safety		-

Figure 36: Bed Details Window



😑 Bed Details						
0	are Level	01 Med-Surg Cardiology,	Cardiovascular		IVR ID Phone Ext.	
Patient Information	Bed Turnover	Bed Closur	e Attributes		Patien	t Details
Name Attending Dx AICD placement	1			F Admission 5/12		
Attributes						
Financial						
Insurance Medic	care					
Patient Safety						
Fall Risk Low						

Figure 37: Bed Details Window

2. Click 🔼

Bed Details closes and Floor Plan is displayed.



Chapter 6 Pre-Admissions Worklist

Information for pre–admission patients transmitted through HL7 messages display on **Pre–Admissions Worklist**. Pending admission requests viewed, edited, or canceled. External organizations, such as a doctor's office, might provide information for pre–admission patients, and hospital personnel can enter more details using this window. **Pre–Admissions Worklist** can also be used to create, edit, or cancel bed requests as well as viewing request details. **Notes** is available for patients for pending admission and bed requests.

Access Pre-Admissions Worklist

To access **Pre-Admissions Worklist**, click **Bed Management > Pre-Admissions Worklist** in the left navigation pane.

Functions on the Pre-Admissions Worklist

The **Pre-Admissions Worklist** displays a list of patients for which admission requests have been created.

Patient names are displayed on the patient list along other information such as a diagnosis and age, which are provided by the external organization. If a patient on **Pre-Admissions Worklist**

has a pending admission, a **Pending Admission** icon 🚇 is displayed in the patient tile. A timer is associated with the pending admission status and is displayed in the patient tile (for example, 10M (10 minutes)). If you have the applicable permissions, you can view or edit patient details, edit or cancel the pending admission request, or create a bed request.

Select organizations

If your organization has multiple facilities, all that you have access to are displayed by default in the **Organization** box. **Pre-Admissions Worklist** displays the patient information associated with each facility shown in this box. The **Organization** box on **Pre-Admissions Worklist** is limited to facilities. You can make changes in the **Organization** box by performing the following steps.

1. Click 💙 (selection arrow) on **Pre-Admissions Worklist**.



Chapter 6 Pre-Admissions Worklist

Pre-Admissions Worklist displays the organizations you can access.

Figure 38: Pre-Admissions Worklist

Pre-Admissions Worklist					
CHD	-				
000					
✓ * CHD					
□ * COM					
□ * UNV					

- 2. Do 1 of the following:
 - > To expand the Organization list to view more organizations, click (Expand button). The Organization list expands to show more organizations. The expand button changes to a collapse button , which can be clicked to collapse the selection list.
 - To remove all check marks from the boxes, click (Clear All button).
 All check marks are removed.
 - > To insert check marks in all boxes, click (Select All button). Check marks are inserted in all boxes.
 - > To clear 1 organization, click the specific organization's box. The check mark is removed from the box, and the organization is cleared.
 - To select 1 organization, click the specific organization's box. A check mark is inserted in the box, and the organization is selected.
- 3. Click (Update Work list button).

The changes are saved and the organization list closes. **Pre-Admissions Worklist** refreshes to display the patient information associated with the selected organizations displayed on the list.

Note: After you make changes in the organization list, do not use **Refresh** before clicking **Update Worklist**. If you do, the changes you made in the organization list are not saved and the previous selections in **Organization** are shown.



View details of a Pending Admission request

To view details for a pending admission request, complete the following tasks.

1. Click (the pending admission icon) in the patient tile or the **Requests** column on the specific patient row.

Pending Admission displays a few bed request details.

Figure 39: Pendi	ng Admission Window
------------------	---------------------

AD 1D UNV	F-60y 11/24/1954 MRN L Dx lumbar laminectomy	ATND DR. (A) (B) (C) (C) (C) (C) (C) (C) (C) (C) (C) (C	Unassigne	ed 😑
арзн UNV	다. F-61y 4/21/1954 MRN Dx Enteritis due to adenovirus	ATND DR. Pre-Admit Date 6/3 ^6.45 Bed Cla Pending Admission	Unassigne	ed 😑
UNV	凸 M-48y 8/17/1966 MRN Dx Intestinal infection due to E	ATND DR Pre-Admit Date 6/3 Bed Duration 3H	F - 61y	AD
UNV	M-42y 11/23/1972 MRN Macasocouros Dx Food poisoning due to Vibrio vu	ATND DR.I Care Level MDSG Care Service CARD Pre-Admit Date 6/3 Status OPEN Bed Cla Assignment Unassigned		RD
I 4 4		Pages 1 of 2 Rows 1 - 15 of 16	🛛 Edit	

- 2. Do 1 of the following:
 - > To view more details or edit the bed request information, click Edit on Pending Admission.
 - Patient Details Screen I for the pending admission request displays. To edit information on the Admission Request wizard.
 - To close Pending Admission, click outside the page or click .
 Pending Admission page closes.

Edit a Pending Admission request

To edit the pending admission request for the patient, follow the following procedure.

1. Click (pending admission icon) in the patient tile or the **Requests** column on the specific patient row.



Chapter 6 Pre-Admissions Worklist

Pending Admission displays a few request details.

Figure 40: Pending Admission Window

UNV	MRN Dx Shigela sonnei	Pre-Admit Date 6/3 06:45 Bed Class		
	四 F-81y 5/24/1934	ATND DR.	😫 Edit	RD
UNV	MRN Dx Food poisoning due to Vibrio vu	Pre-Admit Date 6/3 Status OPEN Bed Cla Assignment Unassigned		
	M-42y 11/23/1972	ATND DR. Care Level MDSG Care Service CARD		RD
UNV	MRN Dx Intestinal infection due to E	Pre-Admit Date 6/3 Est. Time 6/5 00:21 Bed Duration 2H		
	- 哈 M-48y 8/17/1966	ATND DR	F - 61y	AD
AD2H UNV	ট F-61y 4/21/1954 MRI I Dx Enteritis due to adenovirus	ATIID DR. Pre-Admit Date 6/3 no.445 Bed Cla Pending Admission	Unassigne	ed 🧲
(A) 1D UNV	6 F-60y 11/24/1954 MRN I Dx lumbar laminectomy	ATND DR Pre-Admit Date 6/3 06:45 Bed Class	Unassigne	ed 🕻
UNV	ت M-65y 2/23/1950 MRN Dx Stent Placement	ATNO DR. CARD (MOSS) Pre-Admit Date 5/12 15:21 Bed Class A1		AD

2. Click Edit

Patient Details Screen I for the pending admission request is displayed.

dmission Request		
Patient Detai	ils Screen I 🔎 🔿 🔿	
Last * First * DOB 4/19/2009 Dx Cough	Middle 00:00 Age 9y Gender *	MRN Image: Mail Attending Image: Mail Arrival Date 5/12 12:33
Visit Information		
Dx	Cough	
Facility Care Level	* CHD ···································	Est. Time 4/8 16:06
Care Service	CHD Oncology Pediatrics	Est. Time 4/8 16:06 Copdate
Patient Class	* Inpatient	
Attending	*	Unit Selection *
Patient Condition Bed Request Priori	Stable	
Notes		
	Note visible to all users	

Figure 41: Admission Request: Patient Details Screen I

- **3.** Do one of the following:
 - > If you want to update the date or time in **Est. Time**, go to Step 4.


Functions on the Pre-Admissions Worklist

- > If you want to update any other boxes, go to Step 6.
- To update the date or time in Est. Time, click .
 Est. Time is displayed.



			_	×
🛃 Est. Time				
Est. Time	6/5/2015 00:21		O	
Estimated Time Change Reason	Select		-	
		OK	Close	2

- 5. Do one of the following:
 - To change the date, type the change in Est. Time or click the calendar icon and select the date.
 - > To change the time, type the change in Est. Time or click the clock icon and select the time.
 - > Click the **Estimated Time Change Reason** arrow and select a reason.
 - > Click OK.

Est. Time closes. The updated date or time displays in **Est. Time** on the **Patient Details Screen I** for the pending Admission Request.

- 6. Enter the applicable changes in the other boxes on the Patient Details Screen I.
- 7. Do one of the following:
 - If you are finished entering changes and want to submit the pending admission request to the same facility, scroll down and click **Submit**.

Patient Details Screen I closes. Pre-Admissions Worklist continues to display the patient

row with ^{III} (pending admission icon) in the patient tile and in the **Requests** column.



Chapter 6 Pre-Admissions Worklist

8. If you want to enter more information for the patient, scroll down and click Next.

The **Patient Needs Screen II** of the **Admission Request** wizard displayed. Based on information entered previously, boxes on the page might have check marks.

dmissio	on Request									
🚇 Pa	atient Needs Scr	een II	0.00	þ						
Last * First * DOB	5/4/1982 00:00	Age	3бу	Middle Gender *	Female			nding ral Date	5/12 13:22	
Dx	Anemia									
Location	ı									
TTY PI Bariatr	ve Pressure Room hone ric Room ive Pressure Room			Super Suite Ro .ow Level Floo Cardiac Monito Near Nursing S	r r	Ring Fer	Suite Room nce Bed Required heelchair Room		VIP Suite Roor Ceiling Lift Large bed	n
Personn	el									
Compa	anion									
Equipme	ent									
Telemetry Monitor										
Isolation	n									
Airbor	ne Isolation		Stan	dard Isolation		Contact I	solation	_	Droplet Isolation < Back Submit	Cance

Figure 43: Admission Request: Patient Needs Screen II

- 9. Do one of the following:
 - > If the information on the page is correct, go to Step 10.
 - If an item applies to the patient, but does not have a check mark, for example, **Telemetry** Monitor, click the box next to the item to insert a check mark. Go to Step 10.
 - If an item has a check mark, but the item does not apply to the patient, for example, Telemetry Monitor, click the box next to the item to remove the check mark. Go to Step 10.
 - > To correct information entered on the previous window, click **Back**.

- Enter the correct information in the boxes.

10. Do one of the following:

If you are finished entering changes and want to submit the pending admission request to the same facility, scroll down and click **Submit**.



Functions on the Pre-Admissions Worklist

Patient Needs Screen II closes. **Pre-Admissions Worklist** continues to display the patient row with a **Pending Admission** icon (a Pending Admission icon) in the patient tile and

in the **Requests** column.

If the information is correct and you want to submit the pending admission request to the same facility, click Submit.

Patient Details Screen II closes. Pre-Admissions Worklist continues to display the patient row with (a Pending Admission icon) in the patient tile and in the **Requests** column.

Cancel a pending admission request

To cancel a pending admission request for a patient (as indicated by the pending admission icon), follow the procedure. You might have to scroll up or down to find the patient.

1. On the right of the patient's row of information, click the **Cancel** button. (You can also click

Cancel on Pending Admission.)

Cancel is displayed.

Figure 44: Cancel Window

Cancel
You are about to cancel this Bed Request. Are you sure?
Reason
Reason* Select
If you added attributes to this request please navigate to the patient details screen and remove them after submitting the cancellation.

2. Click the **Reason** arrow and select a required reason.

The reason displays in **Reason**.



Chapter 6 Pre-Admissions Worklist

3. Click \bigcirc to confirm the cancellation.

Cancel closes and the request is canceled. The pending admission icon ^{ID} is removed from the patient tile and the **Requests** column in the patient's row of information.



This topic describes the Bed Management Worklist.

Bed Management Worklist uses an automated Intelligent Matching Engine (IME) process to find suitable beds for patients. If no match is found using the automated process, the IME process can be performed manually. Functions on this window include creating direct admit requests, reserving a bed, canceling or rejecting a reservation, placing a hold on a bed, or canceling a hold. You can also view the status of requests, as well as **Patient Details** and **Patient History**.

Access Bed Management Worklist

This topic describes how to navigate to the Bed Management Worklist.

To access **Bed Management Worklist**, click **Bed Management > Bed Management Worklist** in the left navigation pane.

Bed Management Worklist is displayed.

Bed Management W	/orklist			
CHD, COM, UNV	•		Q. C T 🔐	
Location	Request Information	Assignment		
ED 60MO AC OPEN 1MO UNV	F - 46y MRN Dx Fever, Cough, r/o TB	Dr. Critosi Lare (LCRC) ETA 3/20 0008	More Suggestions	^
ED 60MO AG OPEN 1MO UNV	F - 36y MRN Dx Anemia	Dr. Critical Care (CCRE) ETA 3/20 0008 • Find Bed	More Suggestions	
ED 60MO AD OPEN 1MO UNV	M - 64 MRN Dx R/O Brain Aneurysm	Dr. Critical Care (CCRE) C. Find Bed ETA 3/20 00:08	More Suggestions	

Figure 45: Bed Management Worklist



Buttons on Bed Management Worklist

The following table explains the functions of the buttons in the Assignment column on **Bed Management Worklist**.

Button/Icon	Purpose
Notes or Notes	Click this button to create a note or view notes that were previously created. If a note has not yet been created, the plus sign is displayed in the Notes icon.
S Edit	Click this button to display the applicable request window (for example, the Admission Request window), where you can enter changes to the request.
More Suggestions	Click the More Suggestions link to display the Manual Search window where you can make changes to the patient's needs and care service. You can search for more bed matches or manually run the IME process for the specific bed request. This link is not displayed if a bed reservation or bed hold has been made.
More Results	If the window is in Unit search mode, click this button to display the Unit Search window where you can make changes to the patient's organizations, care service, and care level to search for more unit matches. This button is not displayed if a bed reservation or bed hold has been made.
Compare	This button is displayed only if multiple bed matches are displayed in the Assignment column for the patient. Click this button to display Mixed Comparison to compare the bed attributes of the bed matches.
S Reject Facility	This button is displayed only if a request was referred to the facility. Click this button to display the Reject window, where you must select a reason to reject the bed request.



Other information on the Bed Management Worklist

Button/Icon	Purpose
Seject	This button is displayed only if a bed reservation is made to a unit. Click this button to display the Reject window, where you must select a reason to reject the request.
Cancel	Click this button to display the Cancel window, where you must select a cancellation reason to cancel the request.
•	The Cancel Reserve button is displayed on the patient row in the Assignment column only if a bed reservation or hold was made. Click this button to cancel the bed reservation or hold.
•	The Reserve button is displayed on the patient row in the Assignment column if a bed (or pod) that matches the bed request criteria is available. Click the Reserve button that is associated with the preferred bed (Bed ID) to reserve the bed for that patient.

Other information on the Bed Management Worklist

This topic describes some of the miscellaneous information that is displayed on the Bed Management Worklist.

Bed placement actions that are performed for patients on **Bed Management Worklist** are displayed as abbreviations in the Patient Tiles. The following abbreviations and their definitions are used:

- > HOLD = Hold on Bed
- > OPEN = Open Request Without Any Placement
- R2BD = Reserved to Bed
- R2UN = Reserved to Unit
- > RBWC = Reserved to Bed, Waiting for Confirmation
- > RUWA = Reserved to Unit, Waiting for Acknowledgment.



Functions on the Bed Management Worklist

Use Filter options to display Units

Unlike the Filters function on the other **Worklist** pages, **Bed Management Worklist Filters** has **Display Results As**. This filter can be used to filter the results shown on **Bed Management Worklist** by either bed or by unit as shown in the following page.



Bed Manager	ment Worklist F	ilters	
Filter Name	Test		
Sort By		-	•
Request Type			-
Date Range		*	
Request Status			-
Time In Status	From	То	(min.)
Request Time	From To		
Request Priority			-
From Org			~
To Org			-
Pt Care Level			-
Pt Care Service			-
Pt Gender			-
Pt Attributes			-
Attn. Physician			-
To Bed Status			-
Transfer Reason			-
Display Results As		*	
			🛛 🍸 Filter Now

Figure 46: Bed Management Worklist Filters page

The **Bed Management Worklist** page displays the results if unit is selected as an option for the **Results** filter. Available units are shown rather than available beds. (However, reserved beds are



also shown as well as their units.) The units shown in the **Assignment** column are based on Intelligent Matching Engine (IME) results. The following image is an example of a filtered Unit view.

Bed Management Worklist Q C T 2 0 CHD, COM, UNV • 🛨 🗖 🛛 All 🛛 Filtered beds Unit Location **Request Information** Assignment 6 58MO VIP MED CHD/CVICU/1221-01 Critical Care 8 ~ AD RBWC 8MO CHD-MED-3225-01 🗉 Notes 🔍 Edit 😑 Cancel G ED 58MO R UNV/CVICU/1118-01 Critical Care 0 AD R2BD 19H 🗉 Notes Edit 😑 Cancel UNV 6 ED 58MO R UNV/CCU/1110-01 Critical Care 0 AD R2BD 19H 🗉 Notes Edit 😑 Cancel UNV Ъ 58MO ED B UNV/CVICU/1114-01 Critical Care AD RBWC 19H 🗉 Notes 🔍 Edit 😑 Cancel UNV Ъ 58MO CARD Find Bed TX OPEN 19H More Suggestions UNV-CARD-1141-01 🖻 Notes 🕄 Edit 🗧 Cancel

Figure 47: Bed Management Worklist



Unit View		: 000 🛑	72% 🥌 IN : 0 🤇	DC : 2	🥌 TX : 1 🛛 🔲 OCC : 10	
Facl/Unit/Pod UNV/CARD	•				Q, 😜	C 7
E All Filter						
Location Patient Inform	nation		Pending Act	tivity	»	
0 1139-01					Action Required (0)	*
					No new patients to display.	
1140-01 58MO On	G		TP TX DC		Pending Arrival (0)	\$
				- 11	No pending patients to display.	
1140-02 58MO On	G			-11		
		· ·	TP TX DC	-	Intra-Unit Activity (0)	*
					No patient activities to display.	_
1141-01 58MO On T≫19H	6	(⊤×) (■*	Unassigned 19H	•	Waiting ADT Activity (0)	
		,	TP IIX DC			
1142-01 58MO On	G		TP TX DC	-11		
				-		
	6			-11		
1142-02 58MO On		○○ ■ ⁺ 0:0	58MO	•		
			TP TX DC			
1143-01 58MO On	G		TP TX DC			
				- 1		
0 1143-02				`		

Figure 48: Unit View

The **Bed Management Worklist** page displays the results if unit is selected as an option for the **Results** filter. Available units are shown rather than available beds. (However, reserved beds are also shown as well as their units.) The units shown in the **Assignment** column are based on Intelligent Matching Engine (IME) results.

Directly admitting a patient

You can directly admit a patient using Bed Management Worklist and Portal View by clicking

2◀

. The **Direct Admit** wizard is displayed.

Use IME matches to reserve or hold a bed

The Intelligent Matching Engine (IME) process automatically starts search and match terms to score the beds independently and find available beds that match the patient's needs. The IME



process also calculates the percentage of needs matched by the bed and whether the bed meets the match threshold.

The results of this process are displayed in the **Assignment** column for the patient's row of information on **Bed Management Worklist**. When you click the patient's row, the row expands to display several bed IDs that match the patient's needs. A percentage displays on the right of bed ID to indicate the percentage of needs matched by the bed.

1. Scroll down or browse to another page of **Bed Management Worklist** to find the specific patient with a placement match.

The bed IDs for any bed matches display in the **Assignment** column in the specific patient's row.

Figure 49: Bed Assignment Column



- 2. Click the patient's row of information to view any more bed matches.
- **3.** Click a Bed ID for an available bed (indicated by a green icon) that has the highest match percentage to open Bed Attributes.

Figure 50: Bed Attributes Window



- 4. Review the bed attributes and do one of the following:
 - a. To place a reservation on this bed, click <a>B Reserve .

The reservation icon (B) is displayed next to the reserved Bed ID in the **Assignment** column, and the other Bed ID matches are deleted from this column. The patient tile displays **RBWC** (**Reserved to Bed, Waiting for Confirmation**), and a timer displays on the right to indicate the time in this status.



b. To place a hold on this bed, click ^{III} Hold . Clicking ^{III} Hold places a hold on the bed, and if set up correctly sends a message to the requesting organization that follow-up is required (such as approval of the reservation).

The hold icon \textcircled is displayed next to the held Bed ID in the **Assignment** column, and the other Bed ID matches are deleted from this column. The patient tile displays HOLD (Hold on Bed), and a timer displays to indicate the time in this status. If you clicked a notification message, the message is sent to the requesting organization for follow-up information. For example, if the patient requested an A1 bed, but only a B1 bed is available, then this change might require approval of the requesting organization.

Figure 51: Bed Attributes

H UNV/CVICU/1120-01	Critical Care A+
	🗉 Notes 🔇 Edit 🖨 Cancel

c. To view more bed match results for this patient, click

Bed ID closes and the first page of the **Bed Request** wizard for the **Bed Placement Request** is displayed. **Bed Placement Request** enables you to change needs and manually perform a manual search.

d. To close the Bed ID without making a hold or reservation, click 🔀.

Cancel a bed reservation

To cancel a bed reservation on **Bed Management Worklist**, click **C** on the right of the bed reservation. (Do not click **C** cancel that displays following it, which cancels the bed request.)

Note: An open bed or unit reservation is automatically canceled when the Care Level, Care Service or Attending Physician are updated. The reservation icon is removed from the previously reserved bed tile in the Unit View and the Pending Activity area of the **Bed Management Worklist** and the bed is available for another patient. The user is able to reserve a new bed for the patient after the previous reservation is canceled.



Cancel a Bed Hold

There are 2 ways to cancel a bed hold on **Bed Management Worklist**. One way is to click **C** on the right of the bed hold. Another way is to click the bed ID for the bed hold in the **Assignment** column. The following procedure uses the second method to cancel a bed hold on the **Bed Management Worklist**.

1. Navigate the **Bed Management Worklist** to find the specific patient with the bed hold. Bed holds are indicated by a **Hold** icon next to the bed ID in the **Assignment** column.

Canice Cristic Technology Control Control Care Canice Cani

Figure 52: Bed Management Worklist

2. Click the Bed ID in the Assignment column.

The available options for the room display in a selection list.

Figure 5	3: Room Options
H CHD/C	/ICU/1221-01
	Cancel Hold
	Reserve

3. Select Cancel Hold.

The hold to the bed is canceled. The reservation information is removed from the **Assignment** column and replaced with **Find Bed**.

4. The page might automatically refresh with more available beds. If it does not, click for to display more available beds.

The Intelligent Matching Engine process runs, and the bed ID matches for the patient display in the **Assignment** column. If you prefer to search for a bed that the Intelligent Matching Engine did not return, click **Find Bed** or **More Suggestions** in the **Assignment** column to search for available beds.



Reserve a bed manually

This procedure describes how to reserve a bed manually.

Usually, the Intelligent Matching Engine process automatically displays bed matches for a patient. If no matches for a patient are found, **Find Bed** displays in the **Assignment** column for the patient. Using a manual process, you can enter or change search criteria to find bed matches and reserve a bed for the patient, as explained in the following procedure.

1. Find a patient with no bed placement matches on the **Bed Management Worklist**.

Section 2. Find Bed is displayed in the Assignment column for the specific patient's row.

Figure 54: Find Bed

Bed Management Wo	orklist			
CHD, COM, UNV	•		Q C T 🔐	Z
Location	Request Information	Assignment		
	MRN Dx Fever, Cough, r/o TB		More Suggestions	^

2. In the Assignment column in the specific patient's row, click Find Bed.

Manual Search is displayed. Initially, No records to display. in the Results section.

Figure 55: Find Bed Results Window

Results	
Unit / Bed Pending Care Service	Care Level Bed Class Gender # Open Beds
No records to display.	
	■Compare ■Reserve □Hold □Hold/Notify
	Proceed to Auto Search. Return To Workist

- **3.** There are several ways to change the request in order to display available beds for the patient. Do 1 of the following to change the request:
 - > To edit the filters, go to Step 4.
 - > To edit the patient's needs, go to Step 6.
 - > To edit the patient's details, go to Step 10.
- 4. In the **Filters** section, enter changes in the applicable boxes, which are explained in the following table. All boxes are optional. Removing options broadens the search results, displaying more beds. Conversely, selecting more options narrows the search results, displaying fewer beds.



Data	Purpose
Facility	Select the facility in which to search for a bed.
Organizations	Click a box to remove a check mark or to insert a check mark in a blank box next to the organizations in which to search for a bed.
Care Service	Click a box to remove a check mark or to insert a check mark next to a care services used in the bed search.
Care Level	Click a box to remove a check mark or to insert a check mark next to care levels used in the bed search.
Est. Time From	Enter the estimated from date and time for the search. You can also click the calendar icon to select the date and click the time icon to select the time.
Est. Time To	Enter the estimated to date and time for the search. You can also click the calendar icon to select the date and click the time icon to select the time.

- **5.** Do one of the following:
 - > To search for available beds, go to Step 13.
 - > To edit the patient's needs, go to Step 6.
 - > To edit the patient's details, go to Step 10.

6. Click Sedit Needs.



/IE Needs				
Patient Information				
1141-01 58MO	Fall Risk Insurance	High Medicare		
leeds				
Location				
Positive Pressure Room TTY Phone Bariatric Room Negative Pressure Room	Super Suite Room Low Level Floor Cardiac Monitor Near Nursing Station	Deluxe Suite Room Ring Fence Bed Required Large wheelchair Private Room	VIP Suite Room Ceiling Lift Large bed	
Personnel				
Companion				
Equipment				
Telemetry Monitor				- 11
Isolation				~
			🖪 Save 🧲 Cancel	

IME Needs displays a Needs section.

Figure 56: Needs Window

- 7. If a need is not specified, for example, Near Nursing Station, but it is required, click the associated box to insert a check mark. Use the scroll bar to view other available options. The check mark is inserted to include that specific requirement for the bed request.
- 8. Click

IME Needs closes and the information is saved. Manual Search is displayed.

- 9. Do 1 of the following:
 - > To edit the patient's details, go to Step 10.
 - > To search for available beds, go to Step 13.
- 10. Click Patient Details

Patient Details is displayed.

Note: The boxes on **Patient Details** are configurable by your hospital and might be different than the boxes shown in the following example.



Note: The boxes on **Patient Details** are configurable by your hospital.

Attribute Requests	Notes Contacts T	xCtr Contacts Medical Prov	ider Task List CV Indicators				
Visit Information							
Care Level	* Step-Down			Care Service	* Pediatrics		
Patient Class	* Inpatient			Bed Class	* A 🗸		
	L						
Patient Safety							
Security			*	Disability		*	
Patient Mobility		[Select]	<u>-</u>		Ring F		
Confidentiality			·	Patient Condition	[Select]	*	
Fall Risk		[Select]	*				
Personal Preference	2						
Patient Preference	[Select]	•					
Isolation							
Contact Isolation			-		Chem	otherapy	
Droplet Isolation			-	Airborne Isolation		Ψ.	
Financial							
Insurance		[Select]	•	Bad Debt Code	[Select]		
Demographics							
Patient Type	[Select]	*					
Patient Needs							
Telemetry							

Figure 57: Attributes Tab

- **11.** Enter the applicable changes on the **Attribute** tab of **Patient Details**, for example, selecting the required **Care Level** and **Care Service** for the patient.
- 12 Click

Patient Details closes and the information is saved. Manual Search is displayed.

13 Click Search to determine if there are available beds that meet the requirements of the request.



Manual Search displays available beds for the request.

Figure 58: Results Window

Results	
Unit / Bed Pending Care Service	Care Level Bed Class Gender # Open Beds
Unit / Bed Pending Care Service	Gastroenterology,Internal Medicine,Infectious Disease,Nephrology,Neurology,Pain Management,Pulmonology

14 Navigate to the wanted bed in the **Results** section and click the adjacent box in the **Select** column to insert a check mark.

A check mark displays next to the wanted bed indicating it is selected.

15. Click 🖲 Reserve .

Manual Search closes and the bed reservation is completed. The patient tile for the patient displays **R2BD** (Reserved to Bed) or **RBWC** (Reserved to Bed, Waiting for Confirmation).

Compare beds to make a selection

Use the compare function on **Bed Management Worklist** or **Manual Search** to determine which bed is best suited to the patient. The Intelligent Matching Engine (IME) process automatically displays bed matches, and the compare function enables you to view specific bed attributes, compare them, and make the applicable bed selection. This procedure uses the compare function on **Manual Search**.

1. Find the patient on Bed Management Worklist.

Figure 59: Patient Tile on Bed Management Worklist



- 2. Click More Suggestions. You can also click Find Bed if that option displays.
- 3. On Manual Search, select filters if needed, and then click Search, or click

Q Proceed to Auto Search to determine if there are available beds that meet the requirements of the request.



4. Select the beds you want to compare, and then click Compare.

Figure 60: Manual bed search mixed comparison

Hixed Comparison			
		Q. Proceed to Auto Search Q. P	roceed to Manual Search C Return To Worklist
Patient Informati	ion		
1119-01 83M	• <u>B.</u> ? ~ ~	Fail Risk Low	
UNV/ICCU/1133	-01		
1133-01 Ts/1MO ADT ID Bed Status Clean Status Care Service Care Level Score	01 Available GARD STON 1.000	Rooms Registre Pressure Room, Bedade Hontor	₩ Reserve 😡 Hold 😡 Remove
UNV/ICCU/1136	-01		
1136-01 Ts 1MO AOT ID Bed Status Clean Status Care Service Care Level Score	01 Available Clean GGDJ STDJ STDJ STDJ STDJ	Romm Deduce Munitur	🗑 Reserve 😡 Hold 📾 Remove
UNV/ICCU/1136	02		
1136-02 Ts: 1MO ADT ID Bed Status Clean Status Care Service Care Level Score	02 Available Gean GRD STDN 0.991	Romm Bediale Monitor	🗑 Reserve 🖸 Hold 💭 Remove

- 5. On Mixed Comparison do one of the following:
 - > To remove a bed from the comparison, click envire.
 - > To reserve a bed, click <a>Reserve .
 - > To hold a bed, click ^{OD} Hold.
 - > To return to the Bed Management Worklist, click Ceturn To Worklist

Once you make a selection, **Bed Management Worklist** closes and you are returned to the Worklist.



6. To edit the patient's needs, click Sedit Needs. Make the updates on IME Needs, and then click Save

IME Needs				
Patient Information				
(AD 1MO) Fever, Cough, r/o TB	Fall Risk High			
Needs				
Location				~
Positive Pressure Room	Super Suite Room	Deluxe Suite Room	VIP Suite Room	^
TTY Phone	Low Level Floor	Ring Fence Bed Required	Ceiling Lift	
Bariatric Room	Cardiac Monitor	Large wheelchair	Large bed	
Negative Pressure Room	Near Nursing Station	Private Room		
Personnel				
Companion				
Equipment				
Telemetry Monitor				
Isolation				~
			Save	e 😑 Cancel

Figure 61: IME Needs

7. To edit the patient's details, click ^{Patient Details}. On **Patient Details** make the applicable changes and then click



Note: The options on **Patient Details** are configurable by your hospital and might be different than those shown in the following example.

Patient Details								
] 📑 🖻								
3120-01 58MO Tx)20H	Last					MRN	and the second sec	
<u> </u>	First			Middle		Acct		
	DOB		Age	Gender		Attn		
	Dx	ETOH withdrawa	I					
Attribute Reques	ts N	lotes Contacts	Medical Prov	vider 🔪 Task Li	st CV Indicators			
Visit Information								
Care Level		Med-Surg			Care Service		Internal Medicine	
Patient Class	*				cure service		Internal Predicine	
Fatient Class		Inpatient	M					
Patient Safety								
Security								
Patient Mobility		[Select]			Disability		Ring Fencing	
Patient Condition		[Select]		-	Confidentiality			
Fall Risk		Low		-				
Personal Preferen	nce							
Patient Preference	e	[Select]	-					
Isolation								
Contact Isolation				-			Chemotherapy	
Droplet Isolation				-	Airborne Isolati	on	- Chemotherapy	
Financial								
Insurance		[Select]		Ψ.	Bad Debt Code		[Select]	
Demographics								
Patient Type		[Select]						
Раценс туре		[Select]	M					
Patient Needs								
Telemetry								

Figure 62: Patient Details

Edit request details

To edit details of a request on **Bed Management Worklist**, click **C** Edit on the patient's row. The name of the page that displays depends on the request, for example, **Admission Request** for a Pending Admission. However, no matter which request you are editing, you are able to access the **Patient Details Screen** and **Patient Needs Screen** to edit information.



Note: If 2 users attempt to update patient details concurrently, a message displays indicating the name of the user whose changes will be saved. The other user should exit and try updating patient details again.

Reserve a unit or pod for a patient

When admitting a patient, you can reserve them to a unit or pod if there are no beds available.

Use Bed Management Filters to filter the results by **Unit** on **Bed Management Worklist**. When results are filtered by unit, available units (for example, **1WA**) are shown rather than available beds. (However, reserved beds are also shown, in addition to their units.) The units in the **Assignment** column are based on Intelligent Matching Engine (IME) results. If the results are filtered by unit, use the following procedure to reserve a unit for a patient.

Note: Reserving a unit is actually reserving a pod of that unit.

When a unit or pod is reserved for a patient, no color is displayed around the **Reservation** icon

B in the Assignment column. Colors differentiate a unit reservation from a bed reservation, which

shows the bed status color around the icon ((for example, green for an open, available bed).

1. Find the patient on Bed Management Worklist.

The units matching the care service of the patient are displayed in the **Assignment** column on the specific patient's row. For example, after the IME runs, a list of the beds or units matching the care service is displayed and the percentage of match (based on 100%) is also displayed.

Bed Management V	Vorklist		
CHD, COM, UNV	•	Q. C. T 🕯	• 🖉
Location	Request Information	Assignment	
CVICU 60MO © OPEN 10D UNV-CVICU-1115-01	F - 100 MRN Dx AAA	Cardiology (CCRE) ETA 4/15/01:42 Find Bed More Suggestions Notes State Cardiology Kett Kett Kett Kett Kett Kett Kett Ket	^
ICCU 87MO TE OPEN 100 UNV-ICCU-1128-02	M - 80 MRN Dx CVA	Neurology (STDN) ETA 4/15 08:16 UNV/IMCU/3117-01 UNV/IMCU/3118-01 UNV/IMCU/3118-01 State Compare Cancel	

Figure 63: Unit Assignments



2. To display more units in the **Assignment** column, click the patient's row.

Figure 64: Patient Tile

Bed Management Wo	orklist							
CHD, COM, UNV		•				Q C T i	1	3
Location	Request I	nformation		Assignment				
CVICU 60MO Te OPEN 100 UNV-CVICU-1115-01	F - 10 MRN Dx AAA	1	Cardiology (CCRE) ETA 4/15 01:42	% Find Bed	💷 No	More Suggestions		^
ICCU 87MO To OPEN 10D UNV-ICCU-1128-02	M - 80 MRN Dx CVA		Neurology (STDN) ETA 4/15 08:16	UNV/IMCU/3117-01	🕮 Notes 😒 Edit	91% 91% 91% More Suggestions Compare Cancel		
	Request By Last Change Duration Transfer Reason Attributes Needs	4/16 07:10 (9D) 4/16 07:10 9D Place in Appropriate Care Service Low, Medicare None						

- 3. Take one of the following actions:
 - > To reserve a unit for the patient, click 🚹 in the Assignment column.

Bed Management Worklist displays the patient's unit reservation. The patient tile displays **RUWA (Reserved to Unit, Waiting for Acknowledgment**). In the **Assignment** column, because a unit or pod is reserved (not a bed), no color is displayed around the Reservation icon **(R)**.

Figure 65: Bed Management Worklist

Bed Management W	Vorklist		
CHD, COM, UNV	•		Q. C T 🔐 🗹
Location	Request Information	Assignment	
ED 60MO AD RUWA 1MO UNV	MRN'; Dx Fever, Lougn, r/o TB	Critical Care (CCRE) (E) UNV/CCU ETA 3/20 00:08	Notes Edit Reject Cancel

- > To find additional matching units for the patient, go to Step 4.
- > To edit request details, click Set on the patient's row.

The name of the window that is displayed depends on the request (for example, **Direct Admit** for a direct admit patient). However, no matter which request you edit, you can access **Patient Details** and **Patient Needs** to edit information.

- > To compare units, go to Step 9.
- To cancel the patient's Bed Request, click Cancel. Select a cancellation reason and click



4. To find more matching units for the patient, click **More Suggestions** on the patient's row to open manual search.

Patient Information				
1119-01 83MO (1) 1MO	Fall Risk Low			
Filters				
	Organizations	 Q, Search 		
Care Service	Care Level	Clear		
Est. Time From	Est. Time To	0		
Bed Attributes				
Results				
Unit / Bed	Pending	Care Service	Care Level	Bed Attributes
		Care Service		

Figure 66: Manual Search

5. On Manual Search review the Filters and change them if needed, and then click

Manual Search displays matching units and other information, including **# Open Beds** in each unit. Clients using bed attributes (system option: MSBA = Y) will see the Bed Attributes column.

Figure 67: Unit Search

Pending	Care Service	Care Level	Bed Attributes	# Open Beds
	Cardiology, Cardiovascular, Vascular	Step-Down	Negative Pressure Room, Bedside Monitor	
	Cardiology, Cardiovascular, Vascular	Step-Down	Bedside Monitor	
	Cardiology, Cardiovascular, Vascular	Step-Down	Bedside Monitor	
	Cardiology, Cardiovascular, Vascular	Step-Down	Bedside Monitor	
	Cardiology, Cardiovascular, Vascular	Step-Down	Bedside Monitor	
				Compare Reserve OHold Proceed to Auto Search Return To Workd
	Pending	Cardiology, Cardiovasoular, Vascular Cardiology, Cardiovasoular, Vascular Cardiology, Cardiovasoular, Vascular Cardiology, Cardiovasoular, Vascular Cardiology, Cardiovasoular, Vascular	Cardiology, Cardiovsscular, Vascular Step-Down Cardiology, Cardiovsscular, Vascular Step-Down Cardiology, Cardiovsscular, Vascular Step-Down Cardiology, Cardiovsscular, Vascular Step-Down	Cardiology, Cardiovascular, Vascular Step-Down Negative Pressure Room, Bedside Monitor Cardiology, Cardiovascular, Vascular Step-Down Bedside Monitor Cardiology, Cardiovascular, Vascular Step-Down Bedside Monitor Cardiology, Cardiovascular, Vascular Step-Down Bedside Monitor

Note: Asia Pacific clients may see a **Bed Class** column.

6. In **Results** scroll down to the unit or bed and make selections.



- If more than one unit is selected, the Compare button Compare is displayed.
- > If only one unit or bed is selected the following options are displayed:

- Reserve 🖲 Reserve

— Hold 🛄 Hold

- 7. To compare units, click Compare and then do one of the following:
 - > To reserve a unit for the patient, click <a>Reserve .

Mixed Comparison closes and **Bed Management Worklist** displays the unit reservation for the patient. The patient tile displays **RUWA (Reserved to Unit, Waiting for**

Acknowledgment). No color is displayed around the \mathbb{R} icon in the Assignment column because a unit or pod is reserved, not a bed.

- > To remove a unit from Mixed Comparison, click ^{Comparison}, click ^{Comparison}
- > To perform an automatic search, click **Proceed to Auto Search**

IME Results displays any unit or bed that matches the search criteria. If there are no matches, the statement No records to display is shown. Because this action is similar to searching for beds, refer to *Reserve a bed manually* for more information about using this window.

> To perform a manual search, click **Proceed to Manual Search**

Manual Search is displayed (as shown previously), where you can perform a manual search

by selecting specific options in the **Filters** section and then clicking Search. For more information about using this page, refer to *Reserve a bed manually*.

> To return to Bed Management Worklist, click Return to Worklist.

Manual Search closes and Bed Management Worklist is displayed.

Cancel a unit or pod reservation

An open bed or unit reservation is automatically canceled when the Care Level, Care Service or Attending Physician are updated. When a unit reservation is canceled, the reservation icon is removed from the previously reserved bed tile in the Unit View and the Pending Activity area of the **Bed Management Worklist**, and the bed is available for another patient. The user is able to reserve a new unit for the patient after the previous reservation is canceled.



To manually cancel a unit or pod reservation on **Bed Management Worklist**, use the following procedure.

Note: The **Cancel** button Cancel in the **Assignment** column on the bottom right of the patient's row cannot be used to cancel a unit or pod reservation. Clicking this button cancels the unit or pod reservation, not the request.

1. Find the specific patient on Bed Management Worklist.

Bed Management Worklist displays the patient's unit or pod Reservation icon (B) in the Assignment column that has no color around it because a unit or pod is reserved, not a bed.





2. Click the **Cancel Reserve** button ^C on the far right of the **Reservation** icon ^R in the **Assignment** column.

The unit or pod reservation is canceled. The patient's unit or pod **Reservation** icon \mathbb{B} is removed from the **Assignment** column. The units matching the patient's Care Service are shown in the **Assignment** column.

Figure 70: Assignment Column

Clinic OPEN 28D UNV	C) F - 41y 7/17/1972 MRN DX TxCTR(SFRC) UNV	Dr Internal Medicine (CORE) ETA 2/11 13:12	UNV/MICU/3105-01	91% 💽 91% 🖸 More Suggestions 🖬 Notes 🗳 Edit 🛑 Compare
---------------------------	---	--	------------------	--

Direct reservations to units

The Bed Management module offers a feature that supports a unique placement process for areas that manage their own beds. For example, units like Behavioral Health or Labor and Delivery might receive admission requests directly and assign their own beds without involving Bed Management, due to the specialized nature of their patients. Use of this feature requires configuration of a specific Care Level which drives access to the "Unit Selection" arrow on **Admission Request**. By selecting



the applicable unit, the bed request goes directly to that unit's 'pending incoming' list as soon as the request is submitted. The system option **DUBM** can be applied at the unit or pod level so that bed requests for that specific area do not show on the **Bed Management Worklist**, effectively bypassing bed management altogether (if that is the process you want).

Export information to a report

To export information on **Bed Management Worklist**, click *(Export)* on the right of the page. The Bed Management Worklist report displays, showing the information on **Worklist** in a report format.

Polona	na Reporting Printer	d Reports . Red	Receptored	iu Alui	l		-		-								_		
14.4.4	#1> >i 0	1076		Find [Next	4.5	9													
\delta Alls	cripts:								Bed	Managemen	t Worklist								Alsorpty
(arrest (acathan	Patient Rame	Putent Last Reme	Pulsed First Rame		Accest	Gender	~	Declar Rates		Care Service	Level of Care	Depen	Arquest Type	Labort FTA	Data Tane of Respaced	Printly	Rate Taxe at the State	Report Natur	heads
	1	Denver	3ahony	2198	10,000		629		κ.	Pedare	ALL/R Care	with	Tarely Report	8990108	80010-007	Priority 60	101011-019	Operad	
		Nature	Jahn .	2100	10,000	*	78		۰.	Heline	Acute Care	map fore affords treats	Tarafe Target	8/9/11/2:58	K(W(1) 247	Provily 60	ANAL GAS	Gerel	
		(tee	Jahn .	23A	10041		-			Sugary	Sugery	heaters	Deat Adve	10210-004	101/10104	Priority 60	H010 11-14	(pend)	
		Dee	Jane .						Α.	Bargery	Bargery	Index fait	Drul MH	101/1114	10703-010	Printly 60	10/21/10 10:00	Opened	
Report Date	10 ON 2011 2 42 54 PM																		Pap
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Figure 71: Bed Management Worklist Report



Chapter 8 Bed Board

Bed Board enables you to view beds according to unit via tiles displayed in a grid format. You can filter the resulting tiles according to various attributes, such as **Bed Status**. Clicking on the unique Bed ID opens the **Bed Details** window. Additional links on the **Bed Details** window allow access to Patient and Bed details. **Bed Board** has some of the same functions as **Unit View**.

Access the Bed Board

To access **Bed Board**, select **Bed Management > Bed Board** from the left navigation pane.

Figure 72: Bed Management Menu



To view a list of beds, you must first enter **Filter Criteria** at the top of the page and click **Refresh Now**.

The **Disable Auto Refresh** box is selected by default to display a static view of the page. You can select **Refresh Now** to manually refresh results, or enable Auto Refresh by clearing **Disable Auto Refresh**, and at periodic intervals the results will automatically refresh.



Chapter 8 Bed Board

Bed Board functions are described in the following sections.

Figure 73: Bed Board

Bed Board																				
Filter Criteria																			*	
Bed Status	Show All						Ŧ	Care	Service	Service Show All							,	•		
Pending Request	Show All						•	Orga	nization		CHD, CO	M, UNV								•
Care Level	Show All						•	Gend	ler		Show All									•
Bed Attributes	Show All							Patie	nt Attril	utes	Show All						•			
Transfer Reason	Show All						•	Off S	ervice		Show All									•
✓ Disable Auto Refrest	h		Scale =	_			_0					6	► 100%					Refr	esh Now	2
CHD																				Ī
CARD		CH-EDH	CVICU				HEM/C	NC						MED						
1239-01	1244-01 97MO	EDHR-CH-	R 1213-01		1220-01	97MO	520	1-01	97MO	5208-01		5215-01	97MO	3225-01	97MO	3229-02		3235-01	97MO	
1240-01 97MO TP3H	1244-02	EDHR-CH-	1214-01 Tx 10H	97MO	1221-01		620	2-01	97MO	5209-01	97MO	6216-01	97MO	3226-01	97MO	3230-01	97MO	3236-01	97MO	
1240-02 97MO	1245-01		1215-01	97MO	1222-01		620	3-01	97MO	5210-01	97MO	5217-01	97MO	3227-01	97MO	3230-02	97MO	3237-01	97MO	
1241-01 97MO	1245-02		1216-01	97MO	1223-01	97MO	520	4-01		5211-01	97MO	5218-01	97MO	3227-02		3231-01	97MO	3237-02	97MO	
1241-02 97MO	1246-01		1217-01	97MO	1224-01		520	5-01	97MO	6212-01	97MO	5219-01	97MO	3228-01	97MO	3232-01	97MO	3238-01	97MO	
1242-01 97MO			1218-01				520	6-01	97MO	6213-01		8220-01	97MO	3228-02	97MO	3233-01	97MO	3238-02	97MO	
1243-01 97MO			1219-01	97MO			520	7-01	97MO	5214-01	97MO			3229-01		3234-01	97MO	3239-01		

Use the Filter Criteria pane

The **Filter Criteria** pane at the top of **Bed Board** enables you to filter the display of beds according to various attributes.

Figure 74: Bed Board Filter Criteria

Bed Board					
Filter Criteria					*
Bed Status	Show All	•	Care Service	Show All	•
Pending Request	Show All	•	Organization	CHD, COM, UNV	-
Care Level	Show All	•	Gender	Show All	•
Bed Attributes	Show All	•	Patient Attributes	Show All	•
Transfer Reason	Show All	•	Off Service	Show All	•
✓ Disable Auto Refres	h Scale	ē()	➡ 100%	Refresh Now

When **Bed Board** initially displays, no beds are shown, even though the filters may be set at the **Show All** selection. Update the filter settings in **Filter Criteria** as required and select **Refresh Now** to see the resulting beds.

To change **Show All** and specify filter criteria, click the selection arrow next to the applicable boxes, and select 1 or more options by clicking the correct boxes. You can select 1 or multiple



Use the Filter Criteria pane

options for each box. If you do not want to use a specific option to filter data, leave the default **Show All** option.

Figure 75: Organization Filter Criteria



Use the **Organization** filter to select specific organizations (for example, units) limiting search results, in order to display the search results in a timely manner. **Bed Board** is not limited in the number of beds it can display, but the greater the number of organizations, the more beds displayed, and the more time it takes for beds to display on the page.

When choosing multiple organizations, a warning message indicating that results may take longer than usual to display appears. A configurable system option, named Bed Board - Max Number of associated organizations before pre-filtering, determines the maximum number of organizations that triggers this message to display.

Figure 76: Multiple Organizations Warning



After selecting the required options, click **Refresh Now** on the lower right side of the **Filter Criteria** pane. If no beds match the search criteria, no records are displayed below the **Filter Criteria** pane. If you do not want to view the **Filter Criteria** pane, you can collapse it by clicking the **Collapse**

All button 📩. To view the Filter Criteria pane again, click the Expand All button

Note: When the **Filter Criteria** pane is collapsed, the Bed Board refreshes and that space displays the Bed Board.



Chapter 8 Bed Board

View details of beds, patients, and pending requests

On **Bed Board**, clicking the unique Bed ID on a tile opens **Bed Details**.

An unoccupied bed displays the Bed Turnover, Bed Closure, Attributes, and Requests tabs.

😑 Bed Details					
3130-02	ADT ID Care Level	02 Med-Surg			IVR ID Phone Ext.
	Care Service		erology, Internal Medicine, Infect ephrology, Pain Management, Pu ascular	Bed Class	
Bed Turnover Bed Turnover	ed Closure Attri	butes Re	equests		Patient Details
Clean Type	Regular		Clean Priority Select		Cancel Job Submit

Figure 77: Unoccupied Bed: Bed Details Window

If a patient is occupying the bed, clicking the unique Bed ID opens **Bed Details** with **Patient Information**, **Bed Turnover**, **Bed Closure**, **Attributes**, and **Requests** tabs. To view patient details, click the **Patient Details** link on the **Bed Details** window.



View details of beds, patients, and pending requests

Note: To open **Patient Details** from the Bed Board tile, you must have the **Bed Board – Patient Summary PopUp** authorization item enabled for the user's role.

Figure 78: Occupied Bed: Bed Details Window

😑 Bed Detai	ls				
3137-01 41M0	ADT ID Care Level Care Service		erology, Internal Medicine, Infectious lephrology, Pain Management, Pulmonology, ascular	IVR ID Phone Ext. Bed Class	
Patient Information Name Attending Dx PVD Bed Class	on Bed Turnover	Bed Clos	F Admission 5/11	Pat	ient Details
Attributes Financial					
Insurance	Medicare				
Patient Safety					
Fall Risk	Low				

Based on your organization's security policy, you might or might not have the ability to see **Patient Details** on **Bed Board**. Contact your System Administrator to set up the following **Auth Items** called **Bed Details – Patient Details** and **Bed Details – Patients Tab**. (See Administrator Tools User Guide, Chapter 4, User Maintenance, Create authorization roles).



Chapter 8 Bed Board

If you hover over the bed tile icon and have been granted the appropriate authorization (Bed Board Patient Summary pop–up associated to user role) item by your System Administrator, you will see a condensed window with patient information.

3120-01	6
Rode: Institu	F - 65y
Attn. Physician	the second se
Adm. Physician	the second second
Care Service	Internal Medicine
Care Level	Med-Surg
Req Care Service	
Req Care Level	
Dx	ETOH withdrawal
Notes	

Figure 79: Patient Information shown at Bed Tile Hover

Clicking an icon, such as Transfer, Transport or Discharge, in a bed tile opens a window with details on that icon; for example, **Pending Transfer**. The actions available for that icon display at the bottom of the pop–up. While most actions would take place from the Unit View, if your user role has the appropriate permissions associated, some actions may be completed from the bed tile.

Figure 80: Pending Transfer Window

Pending Transfer	0
	M - 58y
Est. Time	11/1 11:14
Status	OPEN
Duration	1D
Reason	Change in Care Service
Bed Assignment	Unassigned
-	🔇 Edit 😑 Cancel



Chapter 9 Admissions Worklist

The patient activities that display on **Admissions Worklist** are dependent on your system configuration. The page can be configured to display only Direct Admits, or it can be configured to display other patient changes, such as Patient Admits, Departs, and Data Updates.

Direct Admit on the **Portal View** and **Bed Management Worklist** enables you to enter information for a Direct Admit patient in Allscripts Patient $\operatorname{Flow}^{\mathbb{M}}$. The Direct Admit activity displays on these pages and on **Admissions Worklist**. The patient's information might also have been entered into the hospital's system (for example, ADT) using a separate data entry or HL7 process. In this scenario, there are 2 admission records for the same patient, 1 in Allscripts Patient Flow^{\mathbb{M}} and 1 in the hospital system.

If details are missing from the patient's record in the hospital's system, you can view the patient's details on **Admissions Worklist** and enter them in the hospital's system. The **Admissions Worklist** also has a Match and Merge function for Direct Admit patients. This function synchronizes a patient's information in the hospital system with the patient's information in Allscripts Patient Flow[™]. The 2 records are consolidated, creating 1 record with all information collected for the patient. However, perform the Match and Merge function carefully because there is no undo process.

Accessing the admissions worklist

To access Admissions Worklist, click Bed Management > Admissions Worklist.



Figure 81: Bed Management Menu

Admissions Worklist is displayed.



Chapter 9 Admissions Worklist

To view more patient information, click the patient's row. More information about the patient is displayed in the right window. This information varies, according to patient activity. For example, the boxes for a **Pending Discharge** differ from the boxes for a **Patient Move**.

Admissions Worklist

Figure 82: Admissions Worklist

Admissions Worklist functions

View the patient change transaction types

Patient change records created by workflows are displayed on **Admissions Worklist**. The following table describes the 8 patient change transaction types in Allscripts Patient Flow[™] that can display on **Admissions Worklist**.

Transaction Type	Generated By	Intended Use
Direct Admit	Adding a Direct Admit	Provide info for registering the patient in the ADT system.
Direct Admit Match	Completing a Direct Admit	Merge PF and ADT patient accounts into 1 record.


Admissions Worklist functions

Transaction Type	Generated By	Intended Use
Patient Admit *	Requesting an Admission	Provide information for Admitting staff to convert the patient account.
Patient Arrival	Arriving a patient	Notify Admitting staff the patient has physically arrived in the reserved location.
Patient Data Update *	Changing a value of certain Patient Details boxes	Notify Admitting staff to update patient information in the ADT system.
Patient Depart *	Departing a patient	Notify Admitting staff the patient has physically left his or her current assigned location.
Patient Discharge Depart *	Discharging a patient	Notify Admitting staff the patient has physically departed his or her current assigned location for a discharge.
Pending Discharge *	Entering a pending Discharge	Notify Admitting staff the patient now has an expected discharge date.

*A System Option (SPCH) can be used to turn off the display of these patient change workflows.

Use the buttons on the Admissions Worklist

Two buttons display at the bottom right of **Admissions Worklist** (scroll down the page to view these buttons). These buttons enable you to perform several functions on this page. **Patient Details** displays on the right pane whenever a patient's row is selected. Clicking this button displays **Patient Details**, which enables you to view more information for the patient selected.

For some patient activities, **Complete** also displays. When you have finished using the patient's activity information on **Admissions Worklist** to enter details for the patient in the hospital's ADT system, you do not have to have the patient's activity record on **Admissions Worklist**. Clicking **Complete** removes the patient's activity record from **Admissions Worklist**. This does not remove the patient's information from Allscripts Patient Flow[™], just the patient's activity record from **Admissions Worklist**.

If a Direct Admit request is waiting for an ADT registration in Allscripts Patient Flow[™], then Direct Admit Match displays in the Type column. Clicking the patient row with this type displays Direct



Chapter 9 Admissions Worklist

Admit Match in the right pane. Scrolling down the right pane displays a **Match** button at the bottom of the right pane. Two Direct Admit Match System Options drive the selection of patients to display as possible matches. The DMMC System Option is the minimum number of characters of the last name to match (typically 3 characters). The DMMH System Option is the maximum number of hours (typically 24 hours) to look back for a patient visit that was created from an external source. The patient must meet both criteria to display as a possible match.

If you click the matching patient's row in the right pane and click Match, the patient's records are merged. The information for the matching patient in the table overwrites the information in the top part of the pane. When the page refreshes, the matching patient's row no longer displays in the right pane on **Admissions Worklist**. Because the Match function is available only for Direct Admit

Match patients, the Match button displays only for this type of patient activity.

Use Patient Details to update the hospital patient record

This topic describes how to update a patient's record.

If you have the authorization item, Patient Details–Update assigned to your user name or your user role, you can view the patient's details on **Patient Details** and enter any missing details in the patient's record in the hospital's system.

1. Click the specific patient's row on the Patients List.



Admissions Worklist functions

Some information for the patient is displayed on the right pane.

CHD Type Patient Gender-Age Acct # Patient Admit Morrison, Benjamin M-24y BM015988 Merrison, Benjamin M-24y BM015988 Middle Initial Gender Age DOB MRN 30899068383 Acct # BM015988 Location Diagnosis R/O Brain Aneurysm Attending Physician Patient Type Inpatient Patient Care Service Internal Medicine Request Care Level Viscolar	Admissions Wor	klist				
Type Patient Gender-Age Acct # Patient Admit Morrison, Benjamin M-24y BM015988 Last Name First Name Hiddle Initial Gender Age DOB MRN 3089068383 Acct # BM015988 Location Diagnosis R/O Brain Aneurysm Attending Physician rear young-coort of ontender woor spectrom rate, many paning, real Patient Care Level Med-Surg Patient Care Level Medicine Request Care Level Critical Care	CHD		•			C 0 2
Patient Admit Morrison, Benjamin M-24y BM015988 Patient Admit Morrison, Benjamin M-24y BM015988 Last Name First Name Middle Initial Gender Age DOB Acct # BM015988 Location Diagnosis R/O Brain Aneurysm Attending Physician reary analyzed received receive						
Patient Admit Morrison, Benjamin M-24y BM015988 Last Name First Name First Name Middle Initial Gender Age DOB Age DOB MRN 3089068383 Acct # BM015988 Location Location Diagnosis R/O Brain Aneurysm Attending Physician regroup Georgeneration of georgenerati	Туре	Patient	Gender-Age	Acct #	Patient Admit	
Last Name First Name Middle Initial Gender Age DOB Age DOB Age DOB Job Acct # BM015988 Location Diagnosis R/O Brain Aneurysm Attending Physician Patient Type Inpatient Patient Care Level Med-Surg Patient Care Service Internal Medicine Request Care Level Critical Care	Patient Admit	Morrison, Benjamin	M-24y	BM015988	_	
Middle Initial Gender Age DOB Age DOB MRN 3089068383 Acct # BM015988 Location Internal Medicine Diagnosis R/O Brain Aneurysm Attending Physicaia rearysama_text_rearysama_text_rearysama_text Patient Type Inpatient Patient Care Level Med-Surg Patient Care Service Internal Medicine Request Care Level Ortical Care						
Gender Age DOB DOB Age DOB DOB DOB MRN 3089068383 Acct # BM015988 Location Diagnosis R/O Brain Aneurysm Attending Physician roarysoning Geor Geor Geor Geor Geor Geor Geor Geor					First Name	
Age DOB MRN 3089068383 Acct # BM015988 Location Intervalue Diagnosis R/O Brain Aneurysm Attending Physician Intervalue Patient Type Inpatient Patient Care Level Med-Surg Patient Care Level Internal Medicine Request Care Level Critical Care					Middle Initial	
MRN 3089068383 Acct # BM015988 Location					Gender	
Acct # BM015988 Location					Age	DOB
Location Diagnosis R/O Brain Aneurysm Attending Physician manyona_coor_on_c					MRN	3089068383
Diagnosis R/O Brain Aneurysm Attending Physician Imagrams _ Extra joint					Acct #	BM015988
Attending Physician Imaginant Case Level Patient Type Inpatient Patient Case Level Med-Surg Patient Case Service Internal Medicine Request Case Level Ortical Care					Location	
Patient Type Inpatient Patient Care Level Med-Surg Patient Care Service Internal Medicine Request Care Level Critical Care					Diagnosis	R/O Brain Aneurysm
Patient Care Level Med-Surg Patient Care Service Internal Medicine Request Care Level Ortical Care					Attending Physician	
Patient Care Service Internal Medicine Request Care Level Critical Care					Patient Type	Inpatient
Request Care Level Critical Care					Patient Care Level	-
Request Care Service Vascular						
					Request Care Service	Vascular
Reserved Location CVICU122101 (CHD)						
Admit D/T 6/27 18:29						
Notes Needs telemetry					Notes	Needs telemetry
Entered By Gateway, Communications					Entered By	Gateway, Communications
Entered Date 2/28 01:53					Entered Date	2/28 01:53
Discnarge Patient Details Complete	Discharge			~	·	Patient Details Complete

Figure 83: Patient List

2. To view more details for the patient, click Patient Details



Chapter 9 Admissions Worklist

Patients Details displays the Attribute tab.

Patient Details				
) (6 ° 🕺				
3225-01 58MO	Last		MRN :	
AD8MO	First	Middle	Acct	
	DOB	ge Gender _M	Attn	
	Dx R/O Brain Aneurysm			
Attribute Reque	sts Notes Contacts M	edical Provider Task List CV Indic	ators	
Visit Information	1			
Care Level	* Med-Surg	Care Service * Inter	rnal Medicine	
Patient Class	* Inpatient	•		
Patient Safety				
Security	Confused	► Ring	Fencing	
Patient Mobility	[Select]	 Disability 	*	
Patient Condition	[Select]	 Confidentiality 	*	
Fall Risk	Low	-		
Personal Prefere	nce			
Patient Preference	e [Select]	*		
Isolation				
Contact Isolation	CDiff	Chen	notherapy	

Figure 84: Patient Details

3. On the **Attribute** tab of **Patients Details**, enter any missing details from the patient's record on the hospital system's window.

You can view patient details on the **Attribute**, **Requests**, **Notes**, **Contacts**, **Medical Provider**, **Task List**, and **CV Indicators** tabs or perform other actions on this window. For more information about **Patient Details**, refer to *Use the patient details panel* for more information.

- 4. Click each tab and enter any missing details in the hospital system's patient record.
- 5. Click 🔲 to return to Admissions Worklist.

Admissions Worklist is displayed.

Note: If two users attempt to update a patient's details concurrently, a warning is displayed to the secondary user indicating that the primary



user's changes will be saved and that the secondary user must exit and re-enter any changes.

Use the Direct Admit Match/Merge function

If there are two records for the same Direct Admit patient, you can use the Match/Merge function to match the patient records and merge them into one record.

Ensure that the patients match and are the same prior to merging the patient records.

Note: Because there is no undo process for this function, ensure that the two patients are the same person prior to matching and merging the records.

1. Click the specific patient's row of information with a Direct Admit on the Patients List.

Direct Admit Match displays at the top of the right pane, and more information for the patient displays following the title.

CHD		•				Q.,
Туре	Patient	Gender-Age	Acct #	Patient Admit		
Patient Data Update		M-21y		Padent Admit		
Patient Admit		M-9y	and the second second	Last Name		
Patient Admit		M-7y		First Name		
Patient Admit		M-7y		Middle Initial		
Patient Admit		M-10y		Gender	Male	
Patient Admit		M-22y		Age	9y DOB 4/19/2009	
Pending Discharge		M-19y		MRN		
Pending Discharge		M-22y		Acct #		
Pending Discharge		F-15y				
Pending Discharge		F-13y		Location	Cough	
				Diagnosis Attending Physician	Cough	
				Patient Type	Inpatient	
				Patient Care Level		
				Patient Care Service		
				Request Care Level	CHD Oncology	
				Request Care Service	Pediatrics	
				Reserved Location		
				Admit D/T	4/8 16:06	
				Notes	Request created during upgrade to . It replaces a req workflow number 504.	uest with

Figure 85: Admissions Worklist: Direct Admit Match

- 2. Do one of the following:
 - > If the name of a matching patient displays in the **Patient** column, go to Step 8.



Chapter 9 Admissions Worklist

- > If the name of a matching patient does not display in the **Patient** column, go to Step 3.
- 3. Click Search near the bottom of the right pane.

Patient Locator displays with the patient's last name displayed by default in the **Last Name** box.

Figure 86: Patient Locator

Patient Locator			
SEARCH Last Name First Name MRN Acct #		Gender	[All]
Patient Gender DOB MRN Acct#			
Please enter information in a Search field to find a patient.			
Patient Information	Patient Location		
Patient Name DOB MRN Acct #	Current Reserved To Departed From Off Floor		
			Patient Details Close

Optionally, enter any other information in the SEARCH section to narrow the search, such as the patient's first name.

4. Click Search



Admissions Worklist functions

Patient Locator displays any patients that match the search criteria.

SEARCH Last Name		First Name	Gend	ler [Al]
Patient	Gender	DOB	MRN	Acct #
	0	100,000	100	10000
Patient Informat	ion	-popular	Patient Location	- EXCLUSION

Figure 87: Patient Locator

5. Click the row with the matching patient information.



Chapter 9 Admissions Worklist

The **Patient Information** and **Patient Location** sections display information for the selected patient.

					×
S Patier	nt Locator				
SEARCH Last Name MRN	81	First Name Acct #		Gender [Al]	ar Q Search
Patient	Gender	DOB	MRN	Acct	;
100-00		*	(997)	- 2012	64)
Patient Info	rmation		Patient Location		
Patient Nar DOB MRN Acct #	me	(10) - 240 (11) - 240 (11) (12) (13) (14) - 240	Current Reserved To Departed From Off Floor	CCMH/1WA152P None None No	

Figure 88: Patient Locator

6. Compare the information for the two patients.

For example, if the MRNs are the same, then the two patient records are for the same person.

- 7. Do 1 of the following:
 - > If the patient is a match, click Select.



Admissions Worklist functions

Admissions Wo	rklist							
CHD		•						Q C Y
Туре	Patient	Gender-Age	Acct #		Direct Admit	Match		
Patient Depart - Discharge Pending Discharge				^	Last Name First Name			
Pending Discharge					Middle Initial Gende r Age	/ / DOB		
Patient Depart - Discharge	100		_		Admit D/T Reserved Location	2/28 08:07 CVICU121601 (CHD)		
Direct Admit Match	-				Patient	DOB	MRN/Acct	Current Location
Direct Admit Match					No records to displa	у.		
Direct Admit Match								- 1
Patient Admit				d				- 1
Patient Admit								- 1
Patient Admit								- 1
Patient Admit								_
Patient Arrival								
Pending	,	,		~		Se	arch Patient D	etails Match

Patient Locator closes and Admissions Worklist is displayed.

Figure 89: Admissions Worklist: Direct Admit Match

> If the patient is not a match, click Close.

Patient Locator closes and **Admissions Worklist** is displayed. No patient displays as a match on the right pane.

 If the two patient records are for the same person, click Match near the bottom of the right pane. The two patient records are matched and merged into one record. The patient's Direct Admit Match record is removed from Admissions Worklist in Allscripts Patient Flow[™].



Chapter 9 Admissions Worklist



Chapter 10 Closed Bed Worklist

Closed Bed Worklist displays beds closed for several reasons, such as a repair or renovation. This page enables you to view bed closure details, update or cancel the bed closure, or reopen the bed. A timer displays in the Patient Tile to indicate how long the bed was in the Closed status. The beds are displayed in descending order by time in the Closed status, with the oldest bed closures displayed at the top of the page.

Closed Bed Worklist Functions

The **Start** and **End** date and time information on **Closed Bed Worklist** represents time estimates for the bed closure. If you schedule the bed closure for the future, the bed automatically becomes closed when the bed is empty, clean, and the **Start** date and time has passed. Your system configuration determines whether a closed bed stays on **Closed Bed Worklist** after reaching the **End** date and time. If automatic reopening is not set, then you must reopen the bed manually in order to remove the bed from **Closed Bed Worklist**. The **End** time box is not a required value to submit the form.

Edit, **Open**, and **Cancel** display in the **Action** column on **Closed Bed Worklist**. For unoccupied beds, a black patient tile indicates a current bed closure, and a green patient tile designates a future bed closure. A blue or pink patient tile indicates a patient still occupies the bed. Any other color in the patient tile indicates a bed-cleaning request.

Edit bed closure information

You can edit information for a bed closure by following the procedure. (Bed closure edits can also be performed on **Unit View** and **Bed Board** by clicking the **Bed ID**, which displays **Bed Details** where you can enter information.) **Close Reason** and **Start Date** on **Bed Status** can only be updated if the bed closure is scheduled for a future date and time. The following procedure uses the example of a future–dated bed closure.

1. Find the row with the specific bed closure that needs to be edited.



Chapter 10 Closed Bed Worklist

The row with the specific bed displays.

Figure 90: Row with Specific Bed

Closed Bed Worklist			
CHD	•		C
			Action
▼ ♥ * ED ▼ * CH-EDH	^	Closed Bed Reason Census Closed By	🔇 Edit 🗹 Open 🖨 Cancel
▼ ▼ * HEM/ONC	\sim	Pages 1 of 1 Rows 1 - 1 of 1	I4 4

2. Click Edit



Closed Bed Worklist Functions

Bed Details is displayed.

😑 Bed Details	•
ADT ID Care Level Care Service	01 IVR ID Critical Care Cardiology, Critical Care, Cardiovascular, Thoracic, Vascular
Patient Information Bed Turnover Bed Closure	Patient Details Bed Closure Attributes Requests
Request Status Reason Cancel Reason Timeframe	There is no Close Bed Request on this bed Select Start 1/31/2014 17:06 Schedule Close Reopen Bed Concel Close

Figure 91: Bed Details



Chapter 10 Closed Bed Worklist

	_			_	×
😑 Bed Details					
1122-01 ^{13MO}	ADT ID Care Level Care Service	01 Critical Care Cardiology, C	ritical Care, Cardiovascular, Thoracic, Vascular	IVR ID Phone Ext. Bed Class B	
Patient Information	Bed Turnover	Bed Closure	Attributes Requests	Patient Details]
Name Attending Dx CABG Bed Class B2			F 84y 9/27/1930 Admission 5/12		•
Attributes					
Financial					Ξ
Insurance Me	edicare				
Isolation					
Contact Isolation	n MRSA				
Patient Safety					Ŧ

Figure 92: Bed Details

- **3.** Do 1 of the following:
 - > To change the close reason for a future close, click the **Reason** selection arrow and select a reason.

The reason displays in the Reason box.

> To change the begin date and time for a future close, type the changes in **Timeframe Start** or click IIII or III icons and select the new date or time.

The changed date or time displays in **Timeframe Start**.

> To change the end date or time, type the changes in **Timeframe End** or click IIII or I icons and select the new date or time.

The changed date or time displays in Timeframe End.



Note: Timeframe End is not required to submit the form.

To cancel the bed closure, go to Step 5.

4. Click Update	
-----------------	--

Note: Clicking Update does not save the changes made in the **Bed Status** section.

The bed closure's information is updated and **Bed Details** closes. The updated bed closure information is displayed on **Closed Bed Worklist**.

5. To cancel the bed closure, click the **Cancel Reason** selection arrow and select a reason. The reason displays in **Cancel Reason**.

6. Click Cancel Close

The bed closure is canceled, and the bed is removed from Closed Bed Worklist.

Open a closed bed

To open a closed bed closure on Closed Bed Worklist, follow the procedure below.

1. Find the row with the specific bed that needs to be reopened.

The row with the specific bed displays.



Closed Bed Worklist				
CHD	•			C
Organization Details				Action
2233-01 Start 2 End CHD	/28 01:59	Closed Bed Reason Closed By	Census	🕄 Edit 🔽 Open 🖨 Cancel

2. Click Open.

The bed is opened and removed from Closed Bed Worklist.



Chapter 10 Closed Bed Worklist

Cancel a bed closure

To cancel a bed closure on **Closed Bed Worklist**, follow the procedure below.

1. Find the row with the specific bed that needs to be canceled. Scroll down or browse to another page, as necessary.

The row with the specific bed displays.

Figure 94: Closed Bed Worklist

Closed Bed Worklist						
CHD, COM, UNV		•				C
Organization	Details				Action	
1244-02 9D	Start End	4/15 14:00	Closed Bed Reason Closed By	And a second sec	😫 Edit 🗳 Open 🖨 Cancel	

2. Click Cancel

Cancel is displayed to request a reason for the cancellation.

Figure 95: Cancel Window



3. Select a **Reason** for the cancellation.

The reason displays in the **Reason** box.

4. Click on Cancel.

The bed closure is canceled, and the bed is removed from Closed Bed Worklist.



Change the bed-cleaning information on a closed bed

You can change bed-cleaning information on a closed bed using the Closed Bed Worklist.

1. Find the row with the specific bed that needs to be reopened.

Figure 96: Closed Bed Worklist

Closed Bed Worklist					
CHD, COM, UNV		•		C	
Organization	Details			Action	
1244-02 9D	Start End	4/15 14:00	Closed Bed Reason Closed By	😰 Edit 🖾 Open 🖨 Cancel	

2. Click Edit .

Bed Details is displayed. Select Bed Turnover to schedule the cleaning.

- 3. Select a cleaning type from Clean Type.
- Select a cleaning priority from Clean Priority. Ensure you have clean priority permissions before selecting Clean Priority.
- 5. Click Submit to save the information.

The information is saved, and **Bed Details** closes. The color of the patient tile on **Closed Bed Worklist** changes to brown to indicate the dirty bed status.

Figure 97: Bed Details

Closed Bed Workl	ist					
CHD, COM, UNV		•				C
Organization	Details				Action	
	Start End	4/3 14:15	Closed Bed Reason Closed By	Census	😫 Edit 🔽 Open 😑 Cancel	
	Start End	4/10 08:44	Closed Bed Reason Closed By	Staffing	😫 Edit 🔽 Open 😑 Cancel	
	Start End	4/10 11:07	Closed Bed Reason Closed By	Census	😫 Edit 🔽 Open 😑 Cancel	
1127-01 4H	Start End	4/10 11:14	Closed Bed Reason Closed By	Census	😫 Edit 🔽 Open 😑 Cancel	



Chapter 10 Closed Bed Worklist



Chapter 11 Facility-to-facility transfers

Facility-to-facility-transfer requests

Use facility-to-facility transfer requests to carry out admission requests, manual or ADT transfer requests, and area transfer requests.

When you use facility-to-facility transfer requests for admission requests, manual or ADT transfer requests, and area transfer requests, the patient record is displayed with the transfer information in red text. The red text indicator shows the facility that the patient is transferring from and the facility the patient is transferring to.

Figure 98: Example patient record with AD icon and transfer location information



Note: The indicator follows the bed tile on the **Bed Management Worklist** (BMWL) of the sending facility.



Chapter 11 Facility-to-facility transfers



Chapter 12 Bed Hold

Administrative settings for Bed Hold

The settings on this page are for configuring administrative settings for Bed Hold.

Before using the Bed Hold, these administrative settings must be configured in Admin > Advanced Maint and Admin > Facility Maint.

- 1. Go to Admin > Advanced Maint > System Options, ensure that THLD is set to Y.
- 2. In Admin > Advanced Maint > Location Status Reasons, ensure that HOLD is available.
- 3. In Admin > Facility Maint > Organization > Facilities > Location Status Reason, select Hold bed for patient's return.
- In Admin > Facility Maint > Organization, select either Units or Pods and then select Procedural Unit.
- In Admin > Facility Maint > Location > Beds, select the bed location that you want to use for the facility-to-facility transfer.

The beds are associated with the pods or units that are your procedural beds.

Important: In the top part of the location record, do not select **Generate Clean Request**.

Transfer a patient to a procedural unit

Use HOLD to transfer a patient to a procedural unit.

When a patient is transferred to a procedural unit, the bed is displayed with a **HOLD** status.

Figure 99: Patient Bed On Hold



This status indicates that the bed is closed and cannot be used by another patient. You cannot create a BTO job.



Chapter 12 Bed Hold

If a patient is transferred to a different bed after the procedure, you must open the bed manually. As a result, a BTO job is created and the bed becomes available for a new patient.



For more information

For more information and the most up-to-date documentation, go to the Allscripts Central website at https://central.allscripts.com. You can access the Product Documentation portal from this website.

- 1. Sign in to the Allscripts Central website.
 - If you have an Allscripts Central account, enter your user name and password, and click Sign in.
 - If you do not have an Allscripts Central account, click Create one to begin creating a new account.

The Allscripts Central home page is displayed.

2. Go to My Products > Product Documentation.

The Product Documentation portal landing page is displayed.

The list of products under the **Product Name** box reflects your preferences in Allscripts Central Central. You can navigate to the documentation for a product using **Product Name** in conjunction with the search function.

Product tiles are also displayed and reflect your Allscripts Central preferences.

3. From **Product Name**, select the product on which to search for documentation.

Product Name uses predictive searching, so as you type the product name, the list displays only matching products. Select the correct product when it is displayed.

4. In the search box, enter search criteria.

The search box also uses predictive searching. As you type, topics that match the criteria are displayed below the search box.

- 5. To complete your search, perform one of the following actions:
 - > Click the magnifying glass.
 - > Select one of the topics displayed beneath the search box.

Search results are displayed in the main pane. You can use the filters in the left pane to further narrow your results. For example, you can select **Feature Guides** from **Document Type** to display only topics that are included in a feature guide.

6. Click a topic title to open the topic in the context of the book indicated by the product, version, and document type tags that are displayed beneath the title.



For more information

Note: If a topic is included in more than one book, a list of the books in which the topic is included is displayed beneath the topic title. Select the applicable book from the list. The topic opens in the context of that specific publication.

What to do next

You can navigate the Product Documentation portal using multiple methods. From the bottom of the portal landing page, click **Helpful Tips** under **Getting Started** to learn more about using the portal.



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