Allscripts Patient Flow 22.1

Bed Management
User Guide

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Proprietary Notice

IMPORTANT NOTICE REGARDING GOVERNMENT USE

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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 Flow™ 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

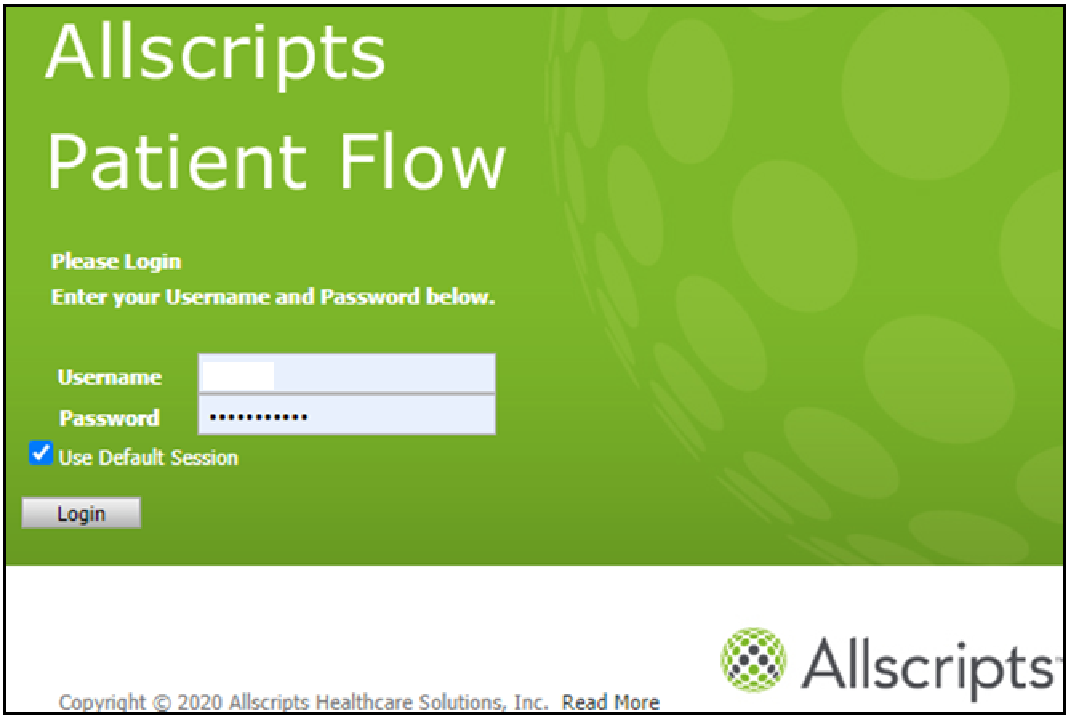
To log on to Allscripts Patient Flow™, enter your login credentials on the **Allscripts Patient Flow** window.

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



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 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).

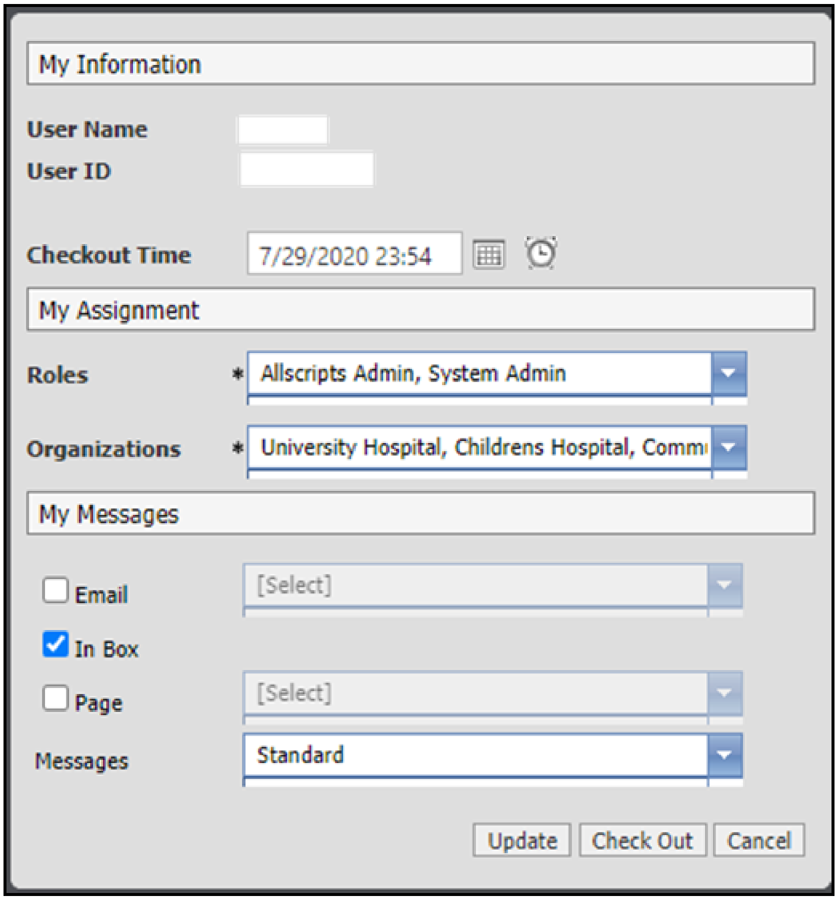
Before you begin

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™).

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.



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™ go to the **In Box**.

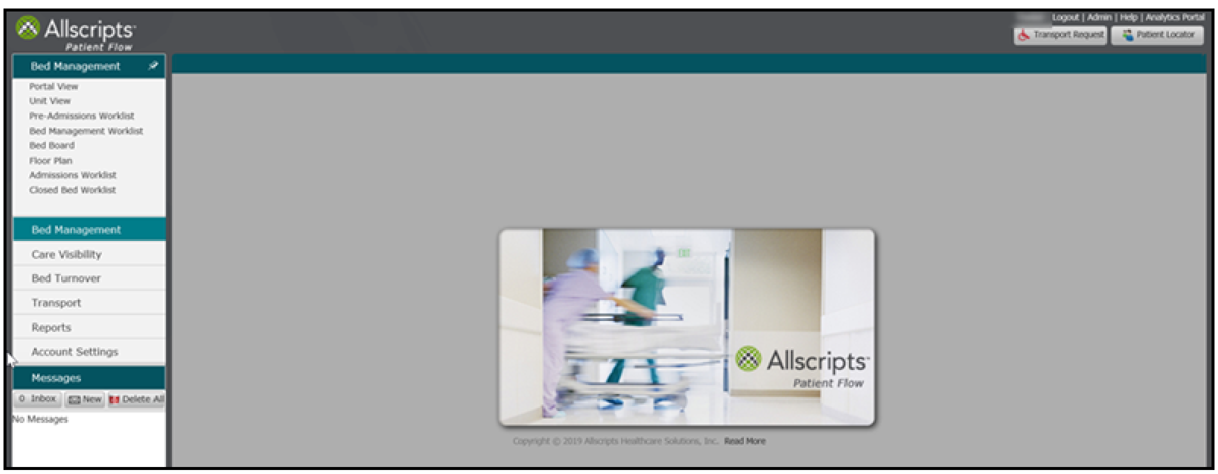
6. (Optional) To use additional message delivery methods (email or pager), select the following options under **My Messages**:
   > To specify that messages are delivered by email, select **Email** and select an email address from the list.
   > To specify that messages are delivered by pager, select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

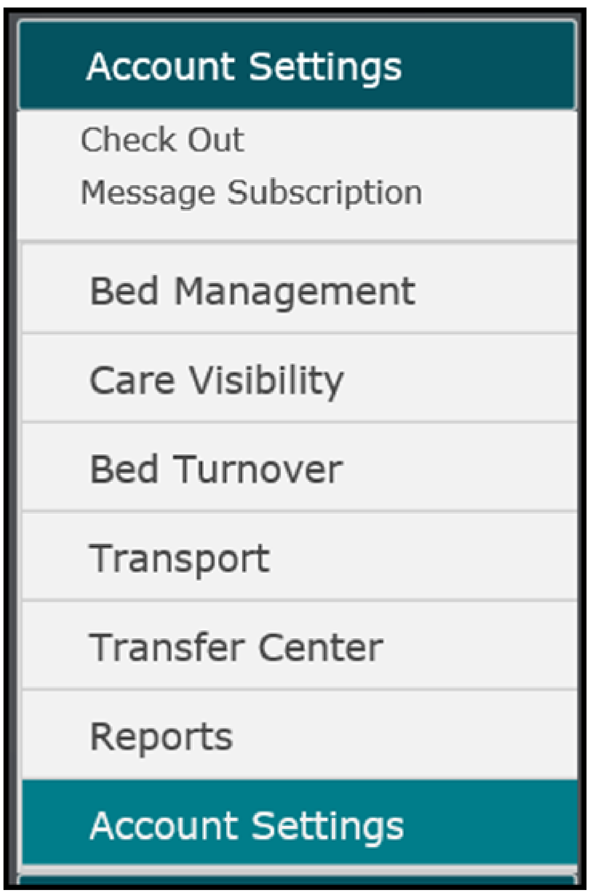
> From **Account Settings**, click **Check Out**.

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.



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™. To change your roles or organizations in Allscripts Patient Flow™, you must first check out of your current session on **Check Out**.

1. From the left navigation pane, click **Account Settings > Check Out**.

   Check Out opens.

2. 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.

2. 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

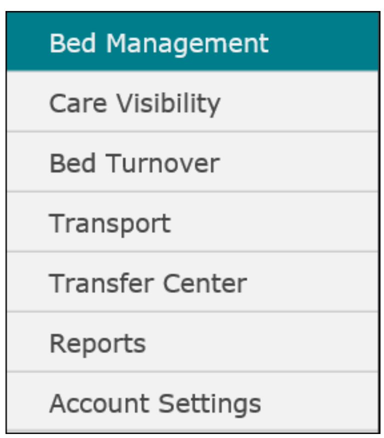
Use the sections on the Allscripts Patient Flow™ page to navigate the Bed Management module.

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.

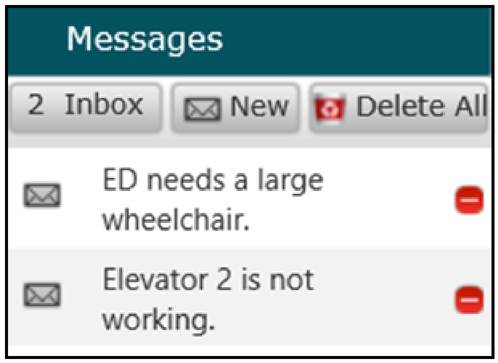
For example, when you click **Bed Management**, the various pages associated with that module display, such as **Pre-Admissions Worklist** and **Bed Management Worklist**. The following figure displays buttons for all Allscripts Patient Flow™ modules, but only the modules that your organization purchased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



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, 2 Inbox). Also, the messages are displayed in a list, as demonstrated in the following image.



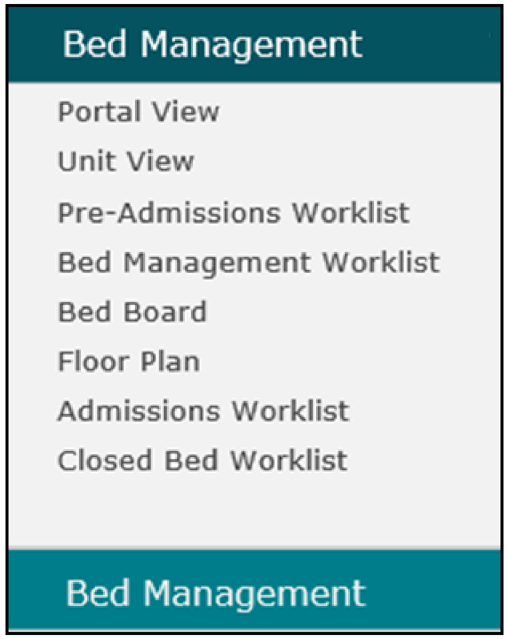
Bed Management functions

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**

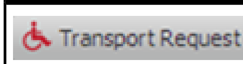
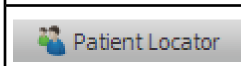
When you click an option in the left navigation pane, the function displays the associated page on the right side.



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
	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.
	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.

Action button	Functionality
	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.
	If search results are found, is replaced by . Click this icon to clear the search filter criteria and display all information.
	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 icon is available only on a user-created tab. If you are on the **All** tab, the icon is unavailable and displayed as .
	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.
	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
	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

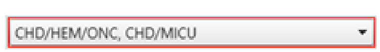
Use the organization list to choose the facility, unit, or pod to which you are authorized access, and to display patient data for those organizations on the associated worklists or pages.

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.

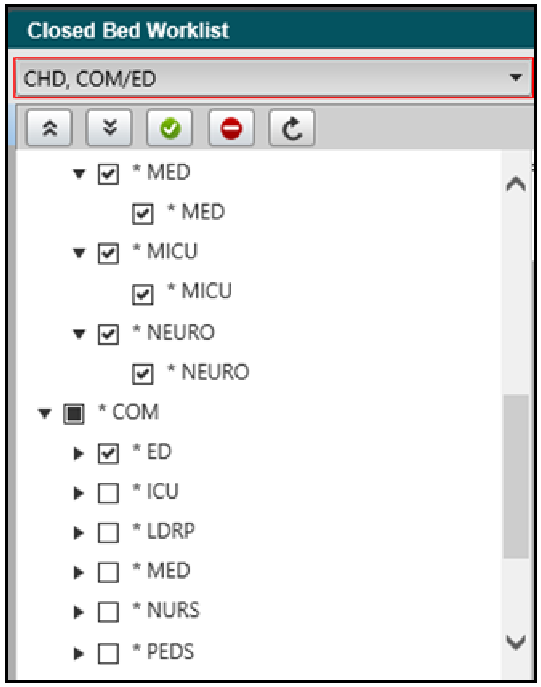
The options on the organization list vary slightly on the Bed Management pages. Some main pages enable you to select multiple organizations at the same time. Others, like the **Unit View** and **Floor Plan** pages, only enable you to select one facility and unit.

> **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.

   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.



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 option is available 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**.

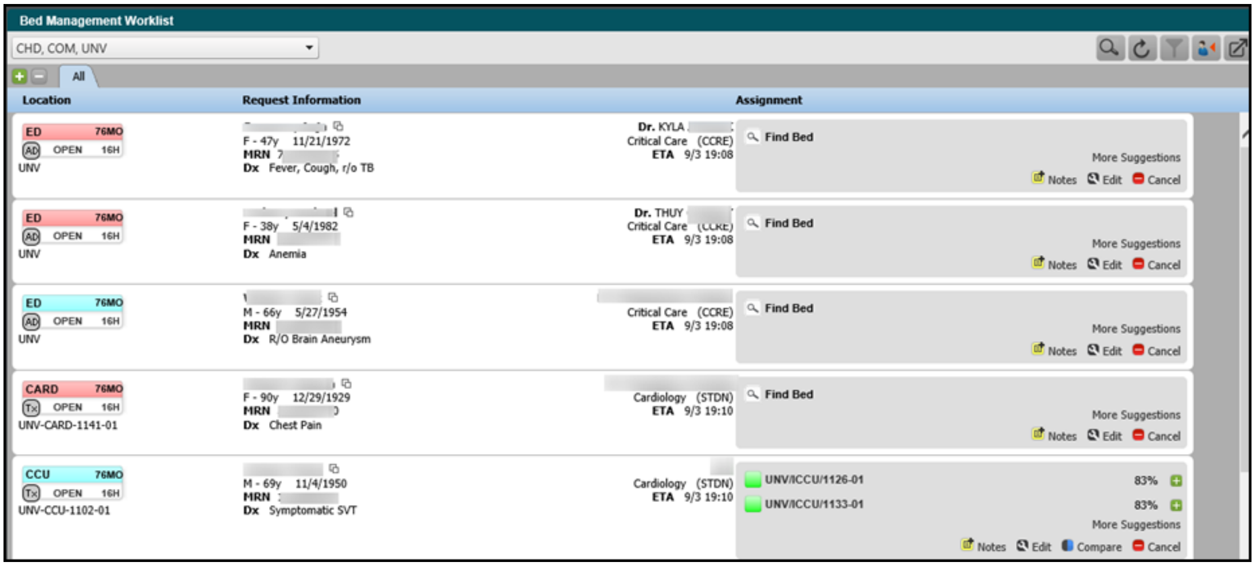
   The organization list closes, and the red border around the box is removed. The associated worklist or page is updated with your organization selections.

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.



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.

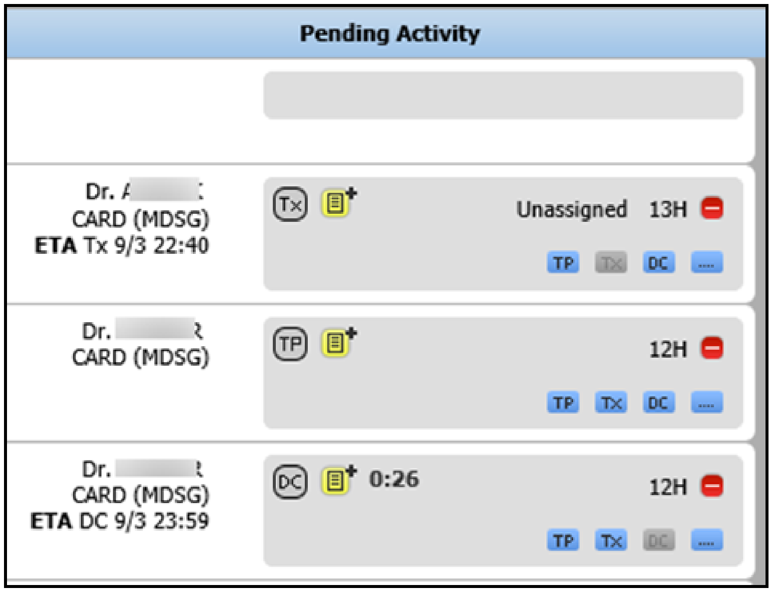
Click to go to the previous page, or click to go to the first page.

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).

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


Pending Activity
Dr.
CARD (MDSG)
ETA Tx 9/3 22:40
Tx
Unassigned
13H
TP
Tx
DC
....
Dr.
CARD (MDSG)
TP
12H
TP
Tx
DC
....
Dr.
CARD (MDSG)
ETA DC 9/3 23:59
DC
0:26
12H
TP
Tx
DC
....

Chapter 2

Bed Management module

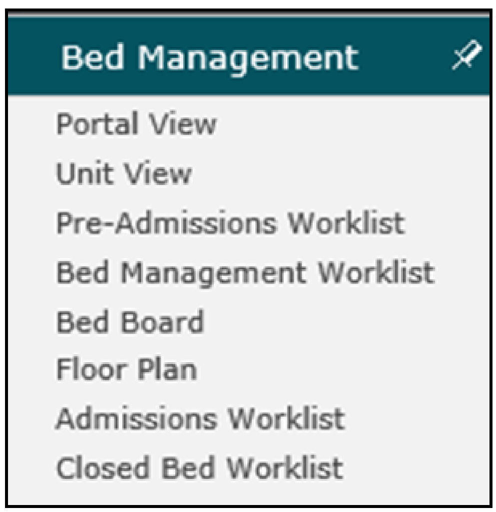
The Bed Management module is a browser-based tool, which enables you to efficiently manage movement of patients through a facility. This module provides better monitoring of patient placement, displays up-to-date information about Allscripts Patient Flow™ and bed capacity, and reduces bed placement time.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

> **Note:** Use Microsoft® Internet Explorer® as your preferred browser for the Allscripts Patient Flow™ 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 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.

Table 1: View or worklist descriptions

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.

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

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)

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 ( ), click a common Allscripts Patient Flow™ icon to use the associated feature.

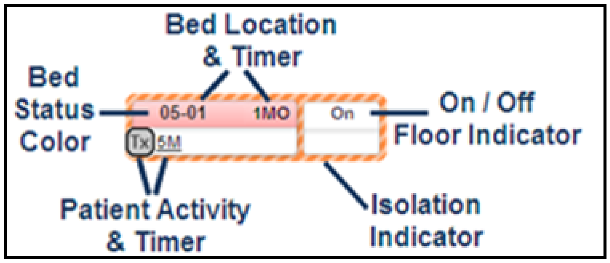
Table 2: General icons

Icon	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.
	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 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.
	Check In and other panels	Opens a time picker, where you can pick one-hour time intervals.
	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.

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	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, displays. Click the icon to add a note. Refer to the information in *Use the Notes Function*.
	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**.
	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, 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**.

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.

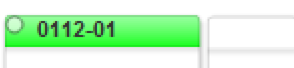
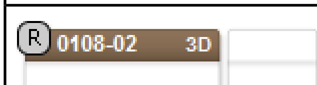


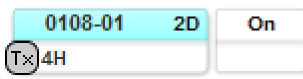
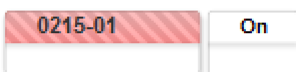
The top panel of the patient tile displays a bed status color. For example, if a bed is in the cleaning process, a yellow color is displayed. If a bed is occupied, a light blue color indicates a male patient, or a light pink color indicates a female patient.

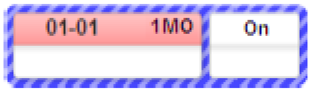
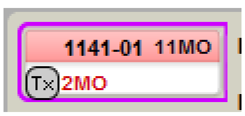
A bed location identification, known as the "Bed ID", also displays in the top panel. The short version of the Bed ID indicates the room and bed location. For example the information is displayed on the **Portal View**and **Unit View** panels, or the facility, unit, or pod location for the bed is displayed 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
	Indicates an available bed.
	The start indicates that there is a bed ahead of the available bed.
	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**).

Tile example	Description
	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™.
	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**).
	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.
	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**.

Tile example	Description
	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**.
	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**).
	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

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.

Table 3: Bed-cleaning status timers

Status abbreviation	Description
M	Minutes (up to 90)
H	Hours (up to 23)
D	Days (up to 30)
MO	Months (up to 11)
Y	Years

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.
Tx	A pending transfer is scheduled for the patient.

Indicators	Description
TP	A pending transport is scheduled for the patient.
DC	A pending discharge is scheduled for the patient.
DC	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 () 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.

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.

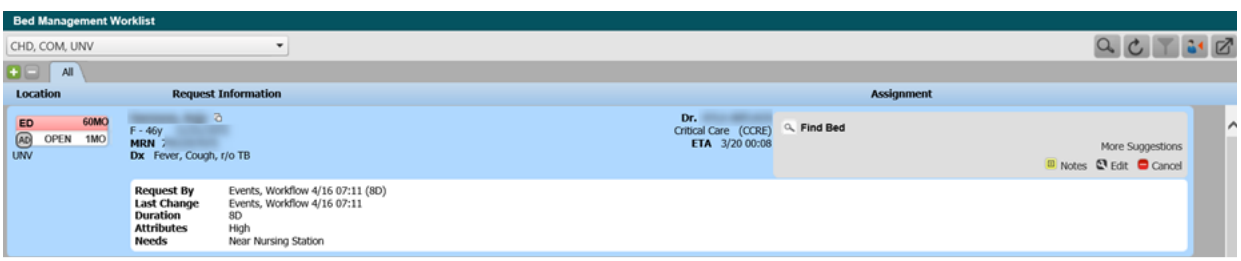
> **Note:** Specified timeouts are configured by your organization's system administrator.

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.



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™ 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).

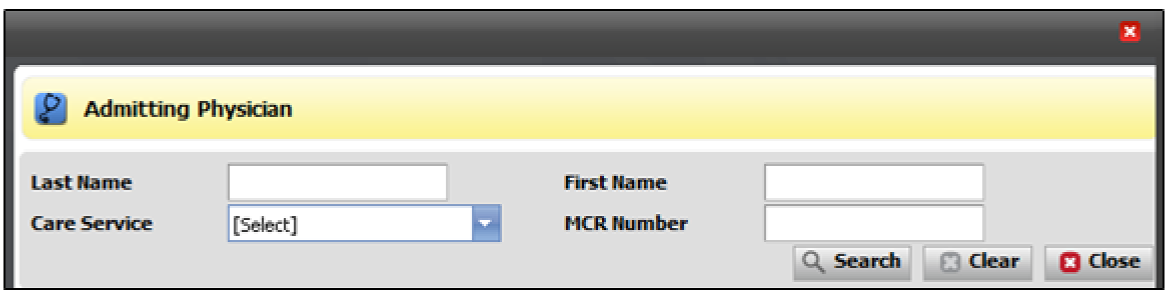
In this workflow example, use on **Direct Admit** to find an admitting physician. The same workflow applies to other fields or panels where the search icon displays.

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 .

2. For **Admitting Physician**, click .

   The **Admitting Physician** panel displays.



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.

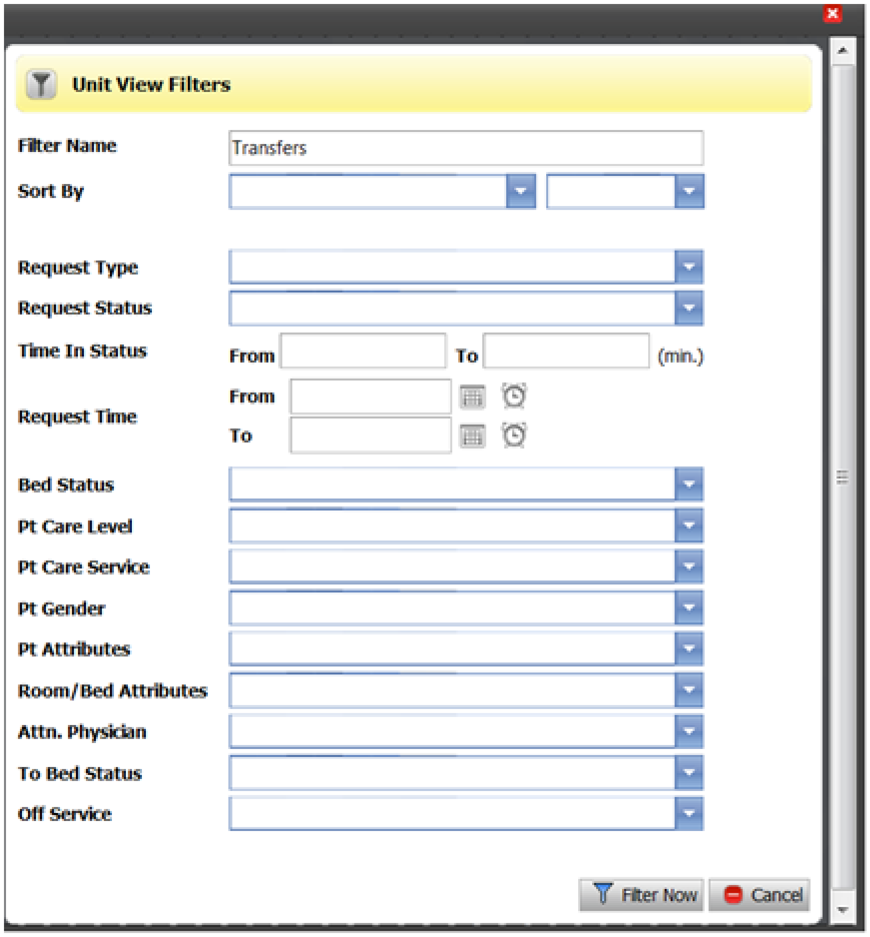
The **All** tab is the first tab that displays on a worklist or view panel by default, and its name displays on the top left of the panel. All patients, locations, requests, and so on pertaining to that worklist or view panel display on the **All** tab. Initially, the **All** tab is the only tab that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

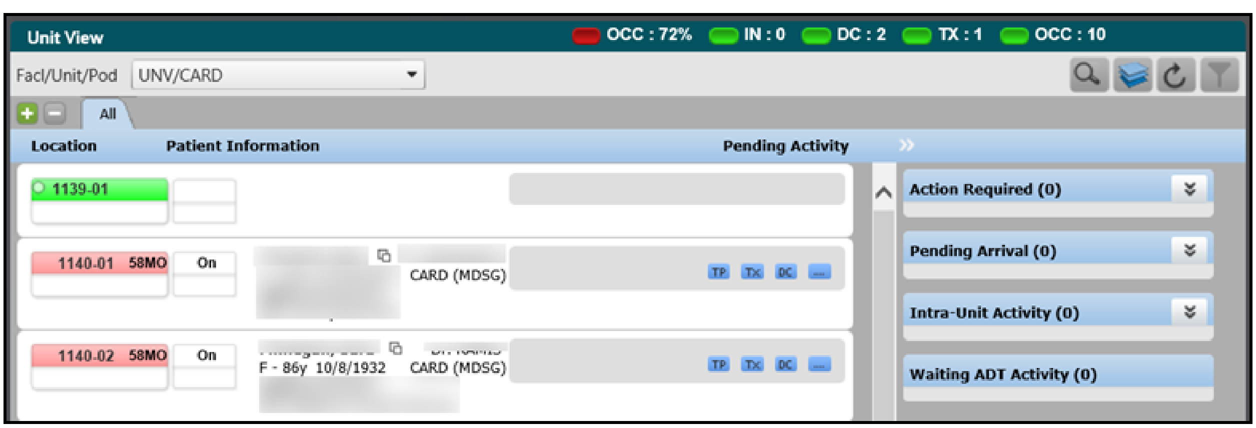
You can select multiple options for some boxes. If you do not want to use a box, leave it blank. For example, if you want to search for **Patient Transfer** requests on the on the **Unit View Filters** panel, click for **Request Type** and then select the **Patient Transfer** box.

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



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.



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**.

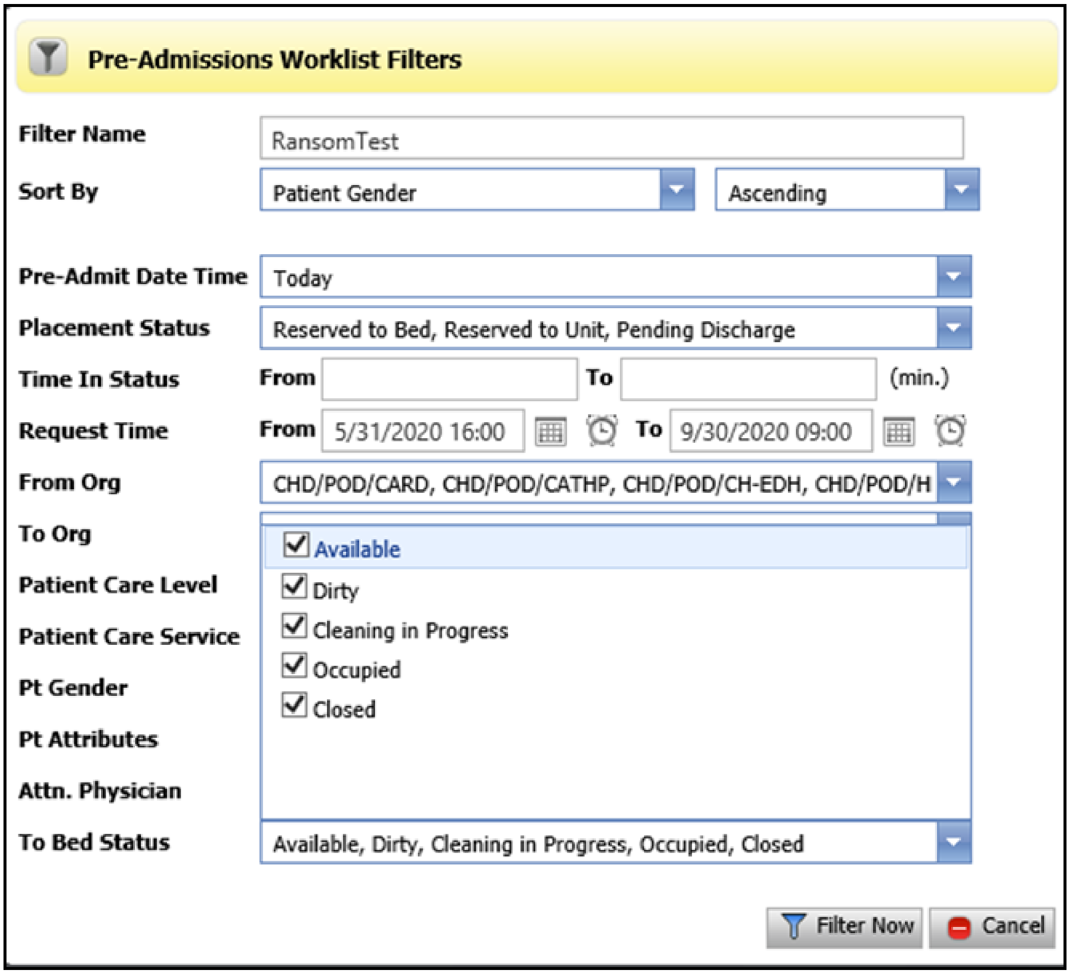
1. In the Bed Management module, open the worklist to edit.

   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 next to **Sort By** on the filter window and select values from the list.
7. To select specific filter values, click 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.



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.

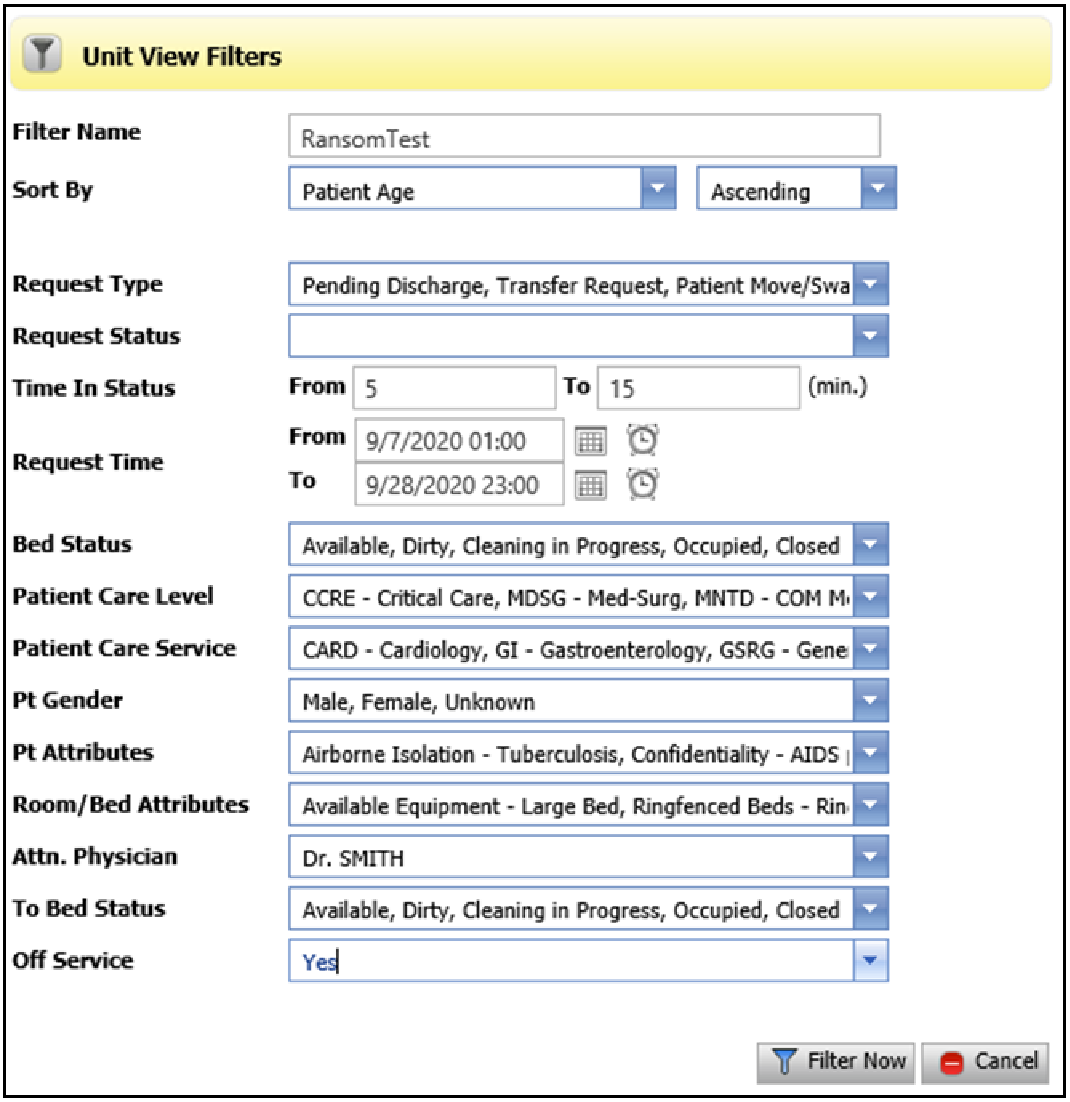
2. From the organization list, select or clear organizations to include or exclude in the tab.

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 next to **Sort By** on the filter window and select values from the list.
7. To select specific filter values, click 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.



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.

2. 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.

3. 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™.

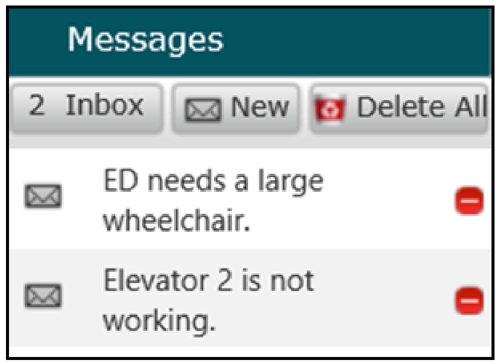
Your organization's system administrator can configure **Messages** to receive applicable types of messages (for example, **Standard**, **Escalation**, and **Alert)**, and to subscribe to various messages by default. If you have the applicable permissions, click **Account Settings** and change these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

View messages

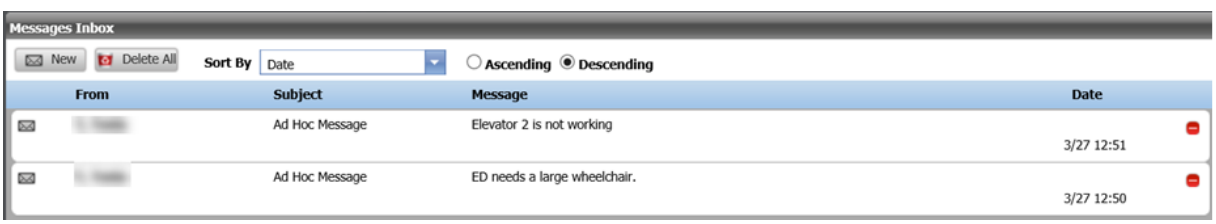
Use the **Messages** functionality to view messages that are exchanged within Allscripts Patient Flow™.

1. Click » 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**.



   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 » 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.

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™.

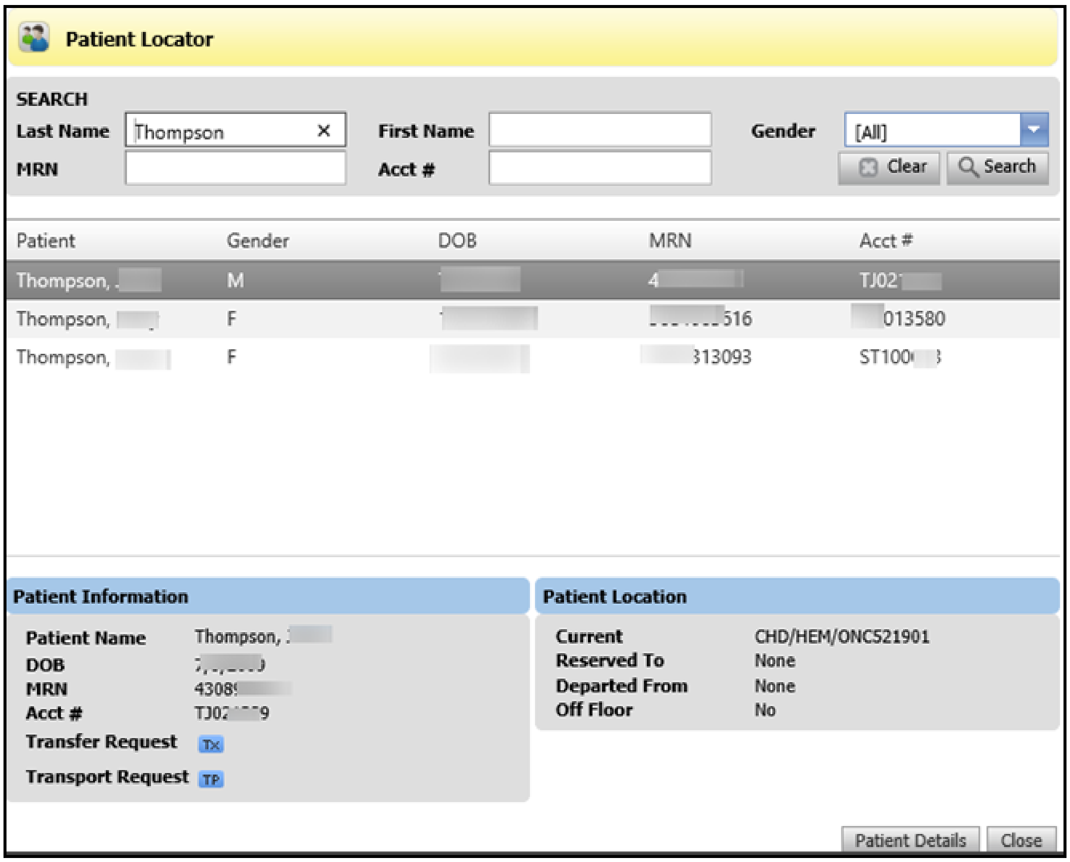
1. Click to expand the left navigation pane and display the **Messages** options.
2. From **Messages**, complete one of the following steps:
   - To delete an individual message, click next to the message.
   - To delete all messages in a single action, click Delete All.
   - Click **Inbox**. On **Messages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

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

Patient Locator

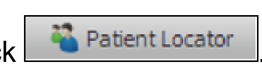
The Patient Locator functionality is available for all Bed Management modules to help you find patients currently located in your facilities. Click 

at the top right of the panel to display the **Patient Locator** panel.



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.

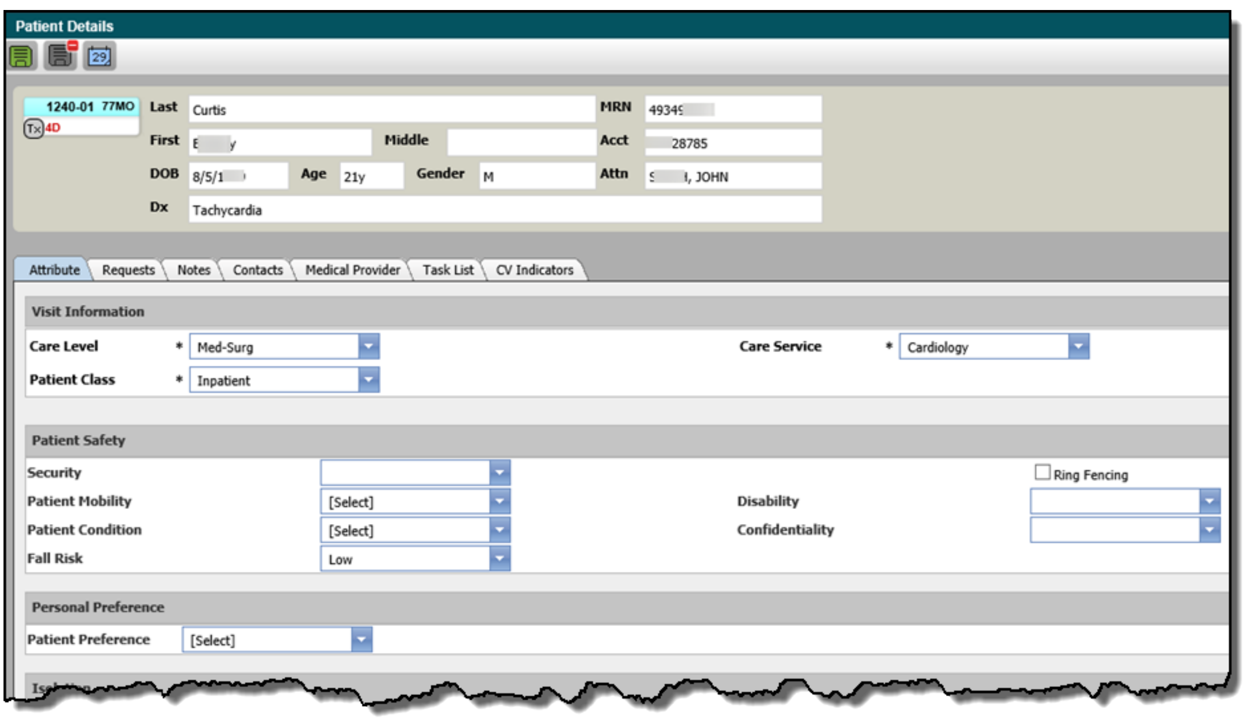
4. To view patient information, complete one of the following actions.

   - > 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.



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 

, 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.

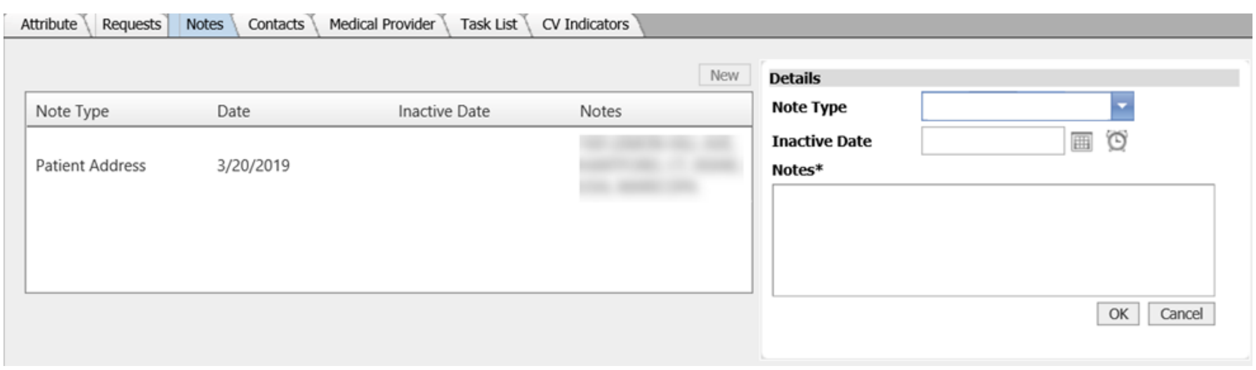
Patient Details tabs	Description
Contacts	Click **New** to enable the **Details** pane, where you can enter the contact name for the patient, relationship, contact method, and address and phone numbers. The contact information that you enter is displayed under the **Contacts** tab.
Medical Provider	Displays 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.

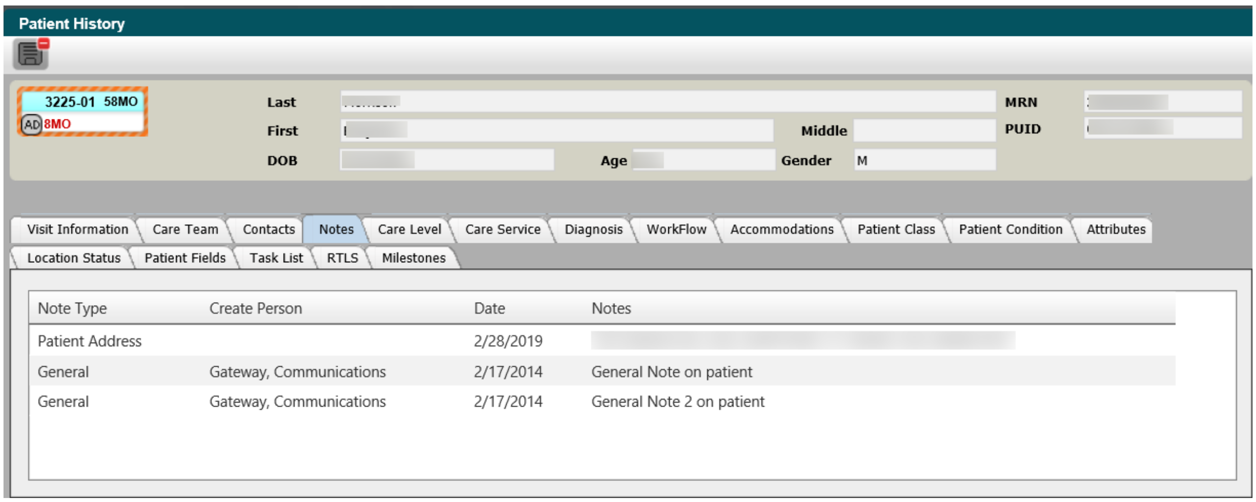
Patient notes

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



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.



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 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**.

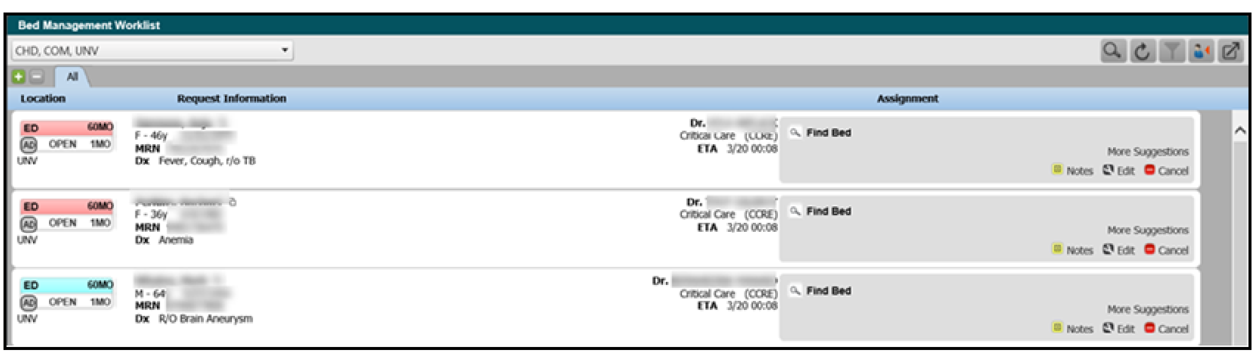
   > **Important**: Verify that the new note is correct on the **Notes** panel before you save. Patient notes cannot be edited or deleted.

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 Notes or Notes options might be displayed under **Assignment**.

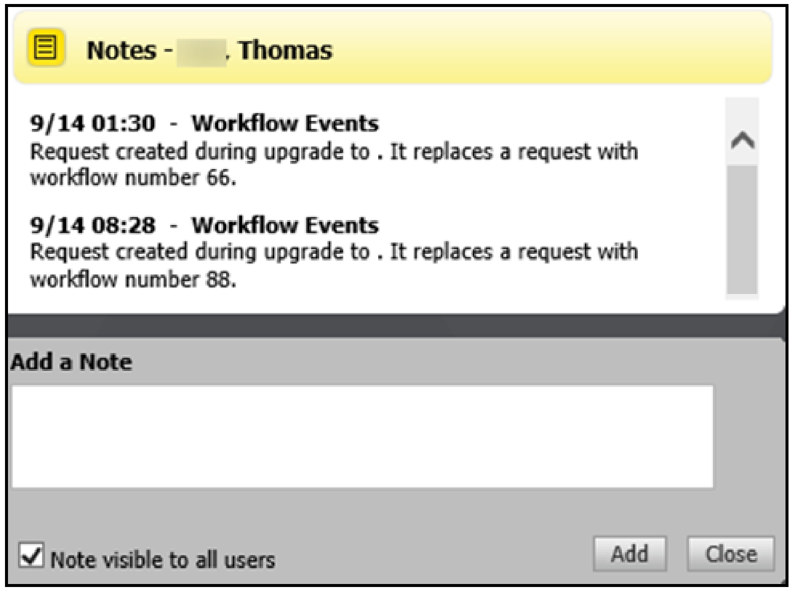


The Notes option indicates that notes are added to the patient record. Point to the icon to display a tooltip with the most current note. To view all notes or add a new note, click the icon or **Notes**.

The 

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**.

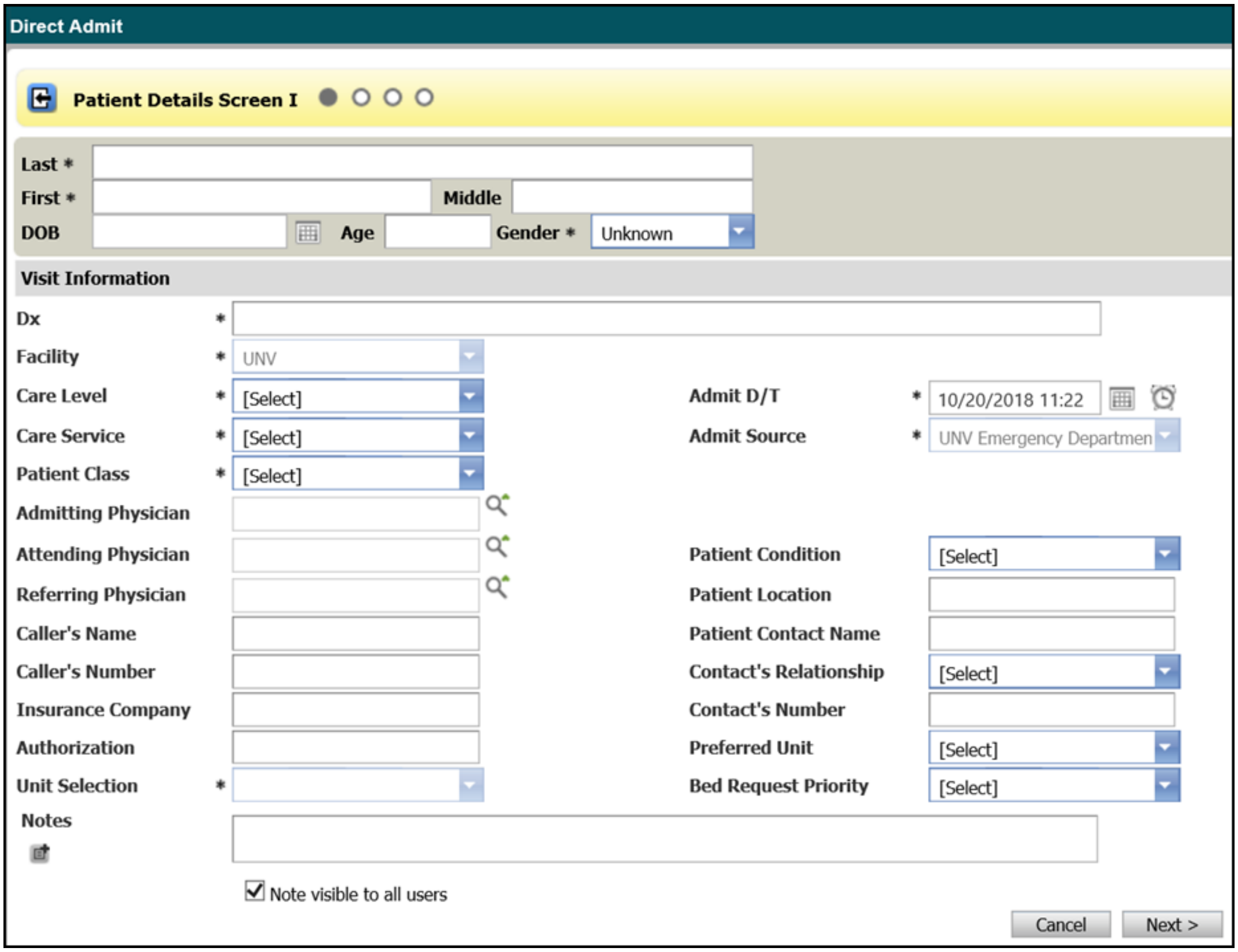
The **Notes** window opens with a list of notes created for the request. If no notes exist, `No Notes` is displayed.



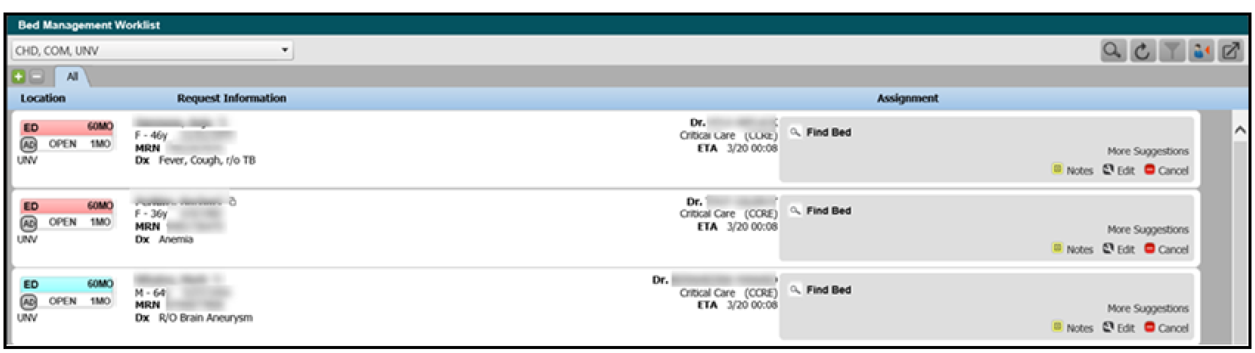
To prevent the note from displaying to all users and make it *private*, clear **Note visible to all users**. A private note is visible only to the person who created it and to any user with the same role as the note creator at the time the note was created.

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.

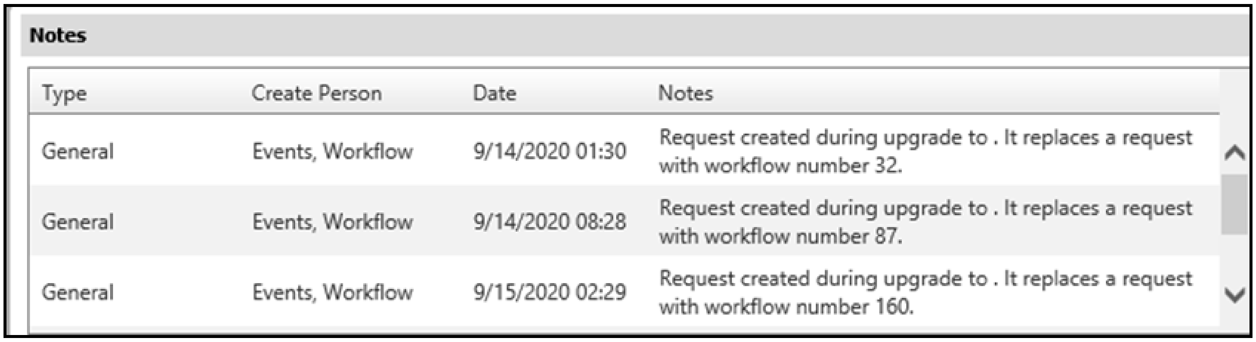
You can also add a note when you create a **Direct Admit Bed** request. For example, on **Direct Admit**, enter notes pertaining to this request in the **Notes** field. If necessary, clear **Note visible to all users** to make the note private.



After submitting the request, view the associated note. When you point to Notes, 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**.



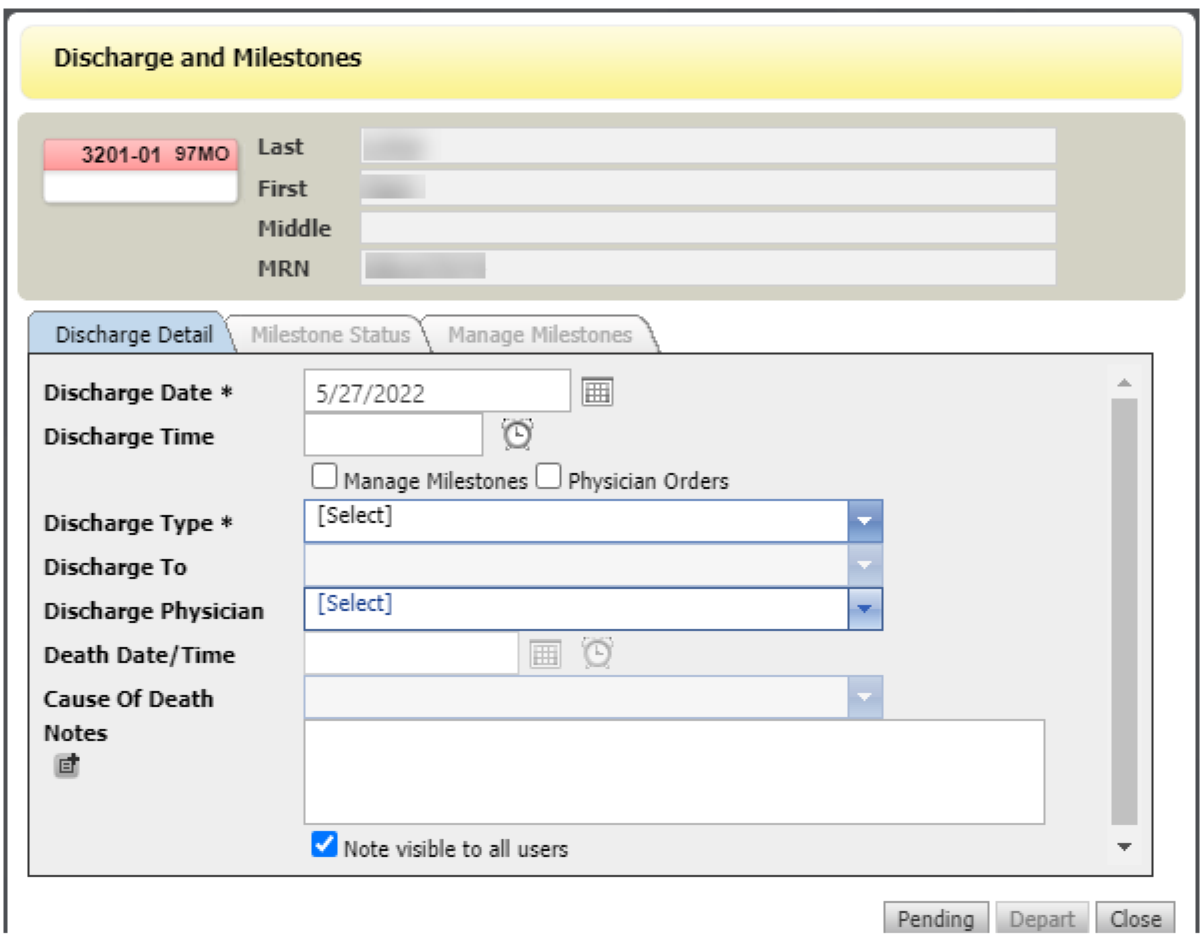
After a workflow for a patient request is completed, the workflow notes are stored in the **Workflow** tab in **Patient History**. To access these notes, click **Workflow**, double-click a workflow, and view the **Notes** section in **Workflow History**.



Notes

Type	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.
General	Events, Workflow	9/15/2020 02:29	Request created during upgrade to . It replaces a request with workflow number 160.

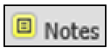
Finally, you can also enter notes for other types of request workflows. For example, when a discharge request is created for the patient, enter notes pertaining to the request in the **Notes** field on **Discharge and Milestones**. If necessary, clear **Note visible to all users** to make the note private.



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 ( or ), complete the following steps:

   a. Click  or .

   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.

2. 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**.

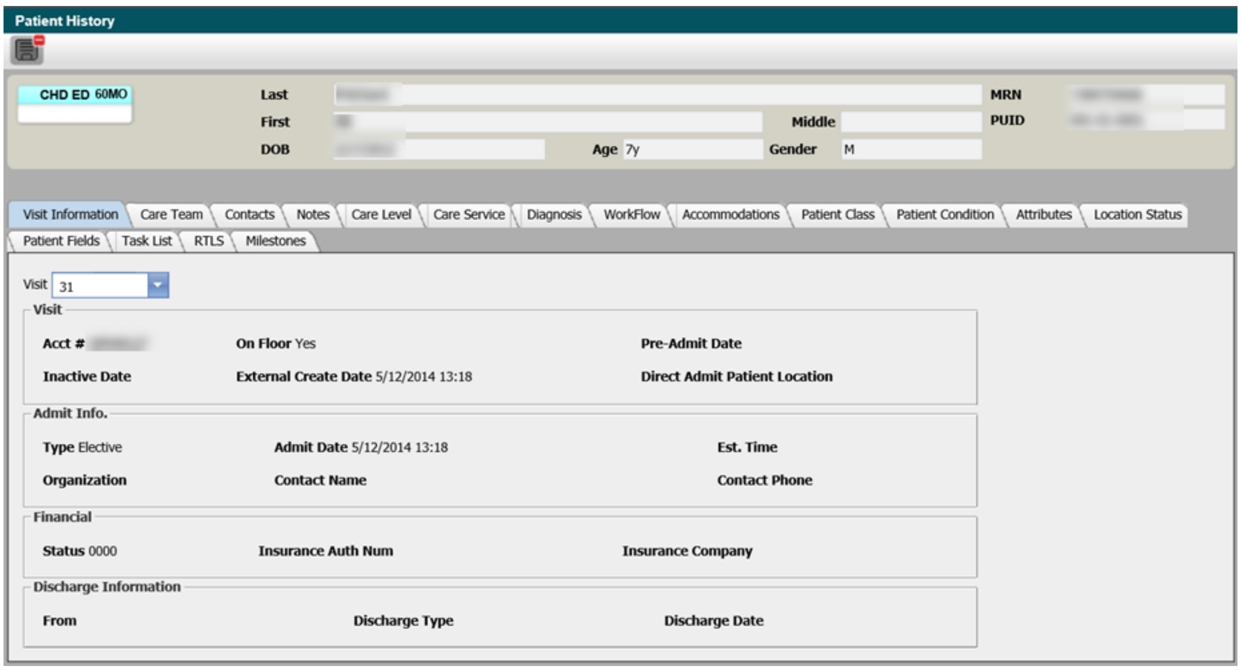
      A *private* note is visible only to the person who created it and to any user with the same role as the note creator at the time the note was created. By default, **Not visible to all users** is selected and the note can be viewed by all users.

      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 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.

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.

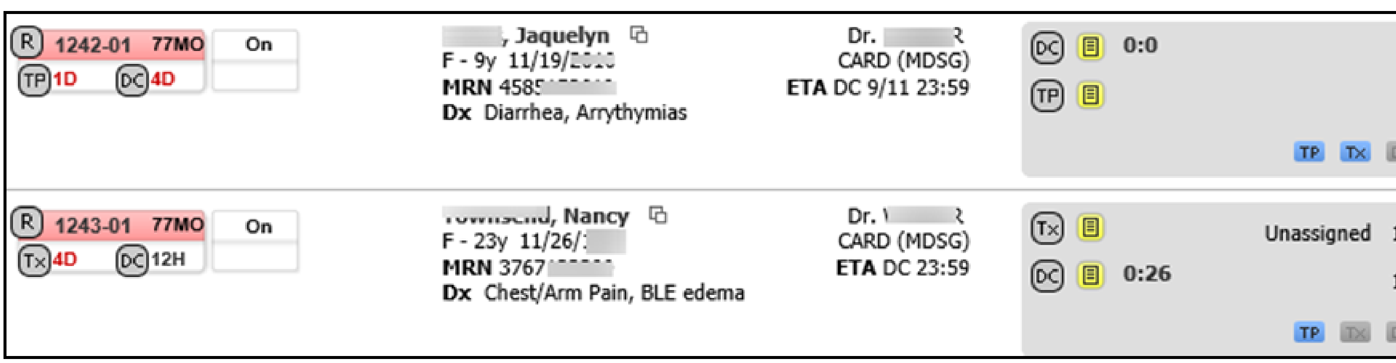
Patient History tabs	Description
Location Status	Displays a history of all patient locations from the origin of Admission through Discharge.
Patient Fields	Displays various patient information (configurable) for the selected visit, such as Home Phone.
Task List	Displays the task list for the patient's 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

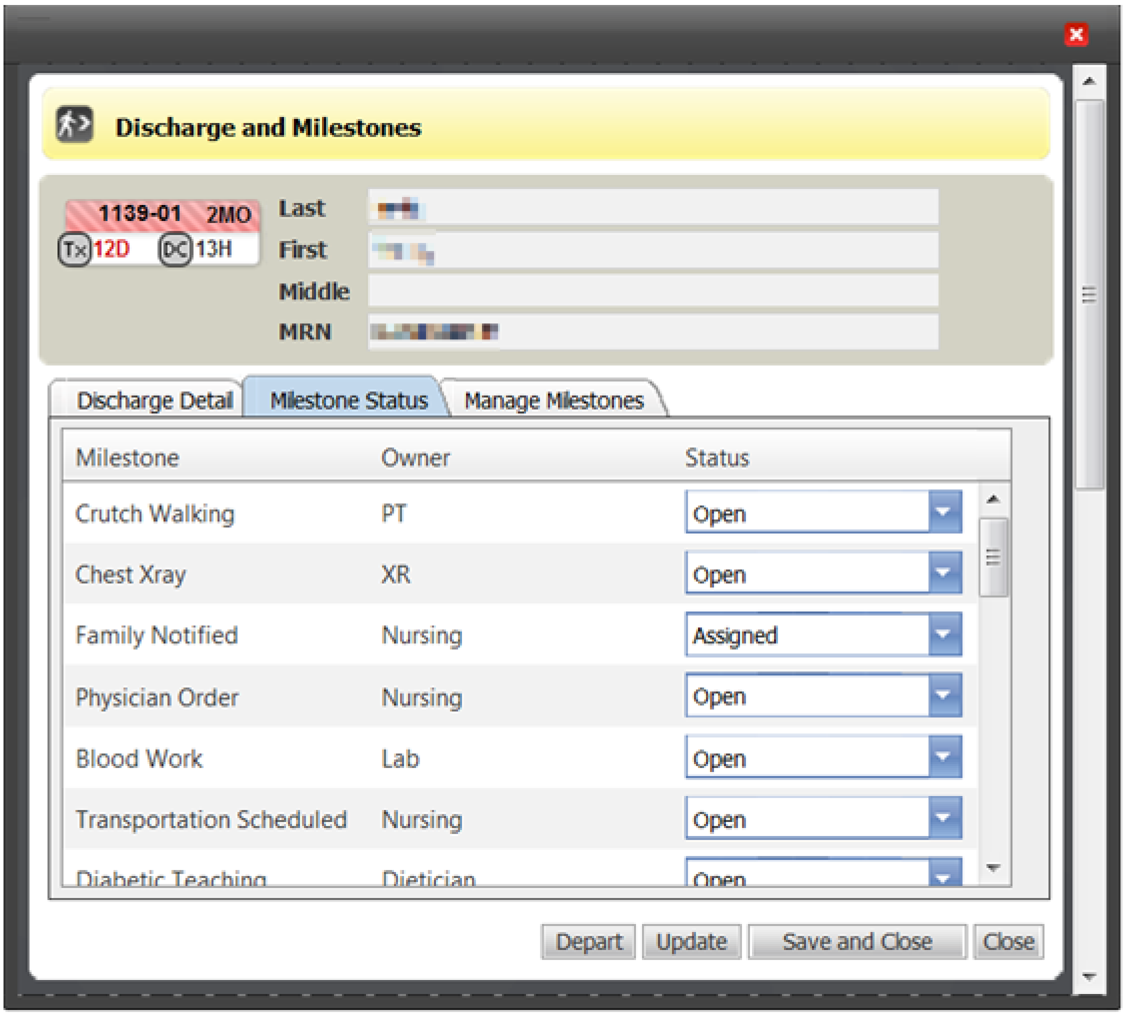
From the **Portal View** or **Unit View**, view the task ratio for a patient's pending discharge milestones.

If a patient has a pending discharge, it is indicated by a **DC** icon (, , or) 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.



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



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	N
`CMPL`	Complete	Y
`ERR`	Entered in Error	Y
`INPR`	In Progress	N
`NTRQ`	Not Required	Y
`OPEN`	Open	N

Allscripts

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.

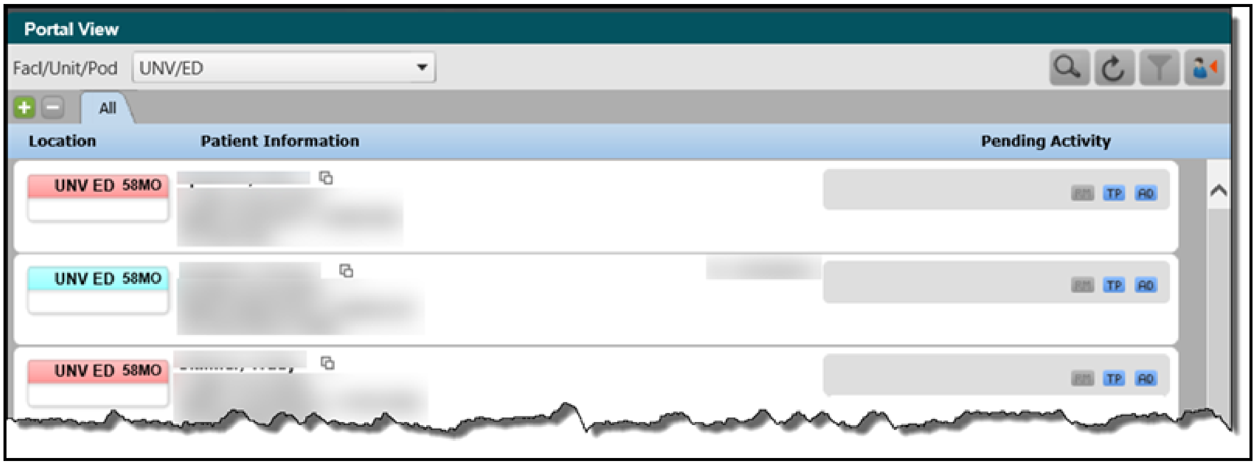
Use the **Facl/Unit/Pod** list on **Portal View** to display the patients who are assigned to a specific facility, unit, or pod. If you work in only one unit or pod, the name of that organization displays automatically in the **Facl/Unit/Pod** box. If you work in multiple organizations, you can choose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

- TP (transport icon)
- TX (transfer icon)
- DC (discharge icon)
- AD (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.


Portal View
Facl/Unit/Pod
UNV/ED
All
Location
Patient Information
Pending Activity
UNV ED 58MO
UNV ED 58MO
UNV ED 58MO
TP
AD

Chapter 4

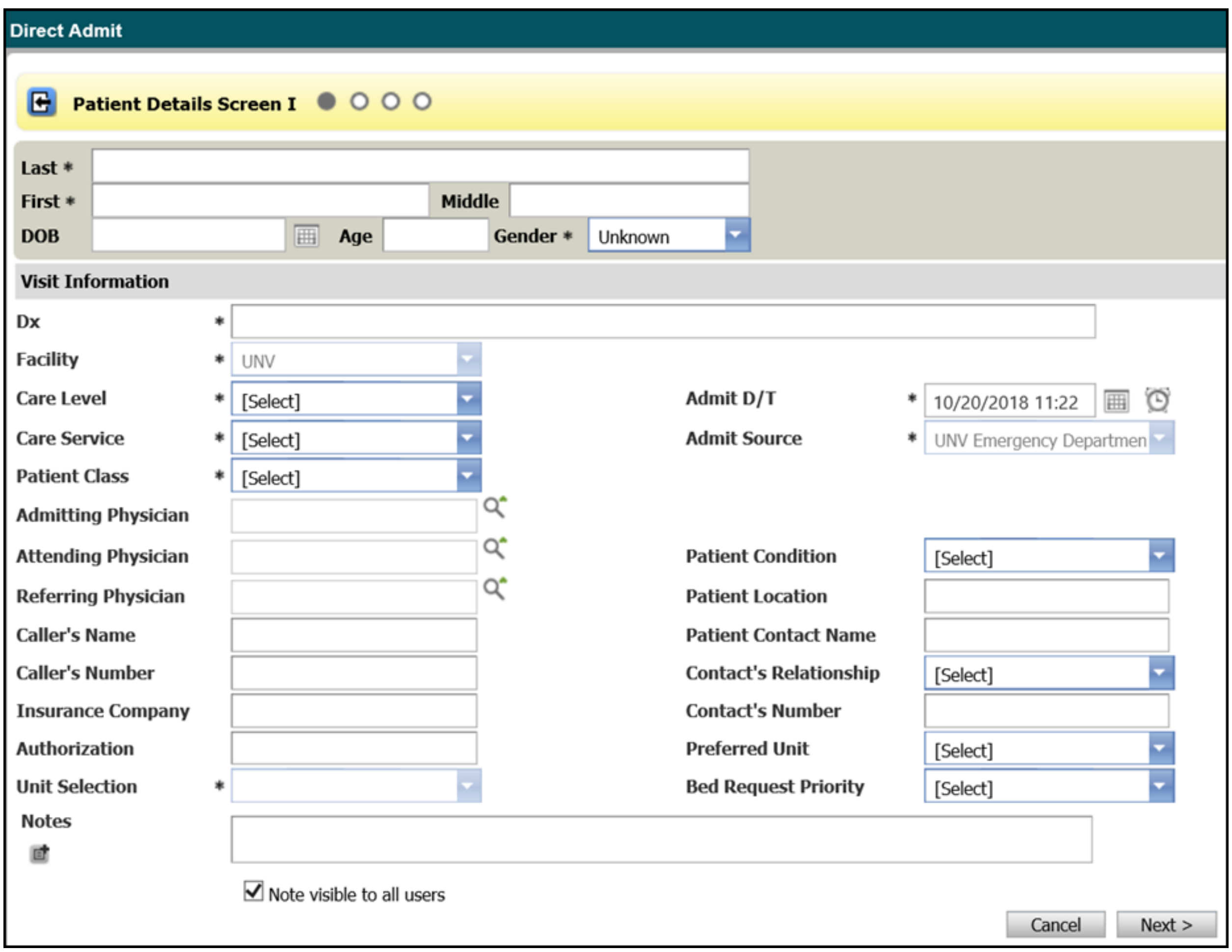
Portal View workflows

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.

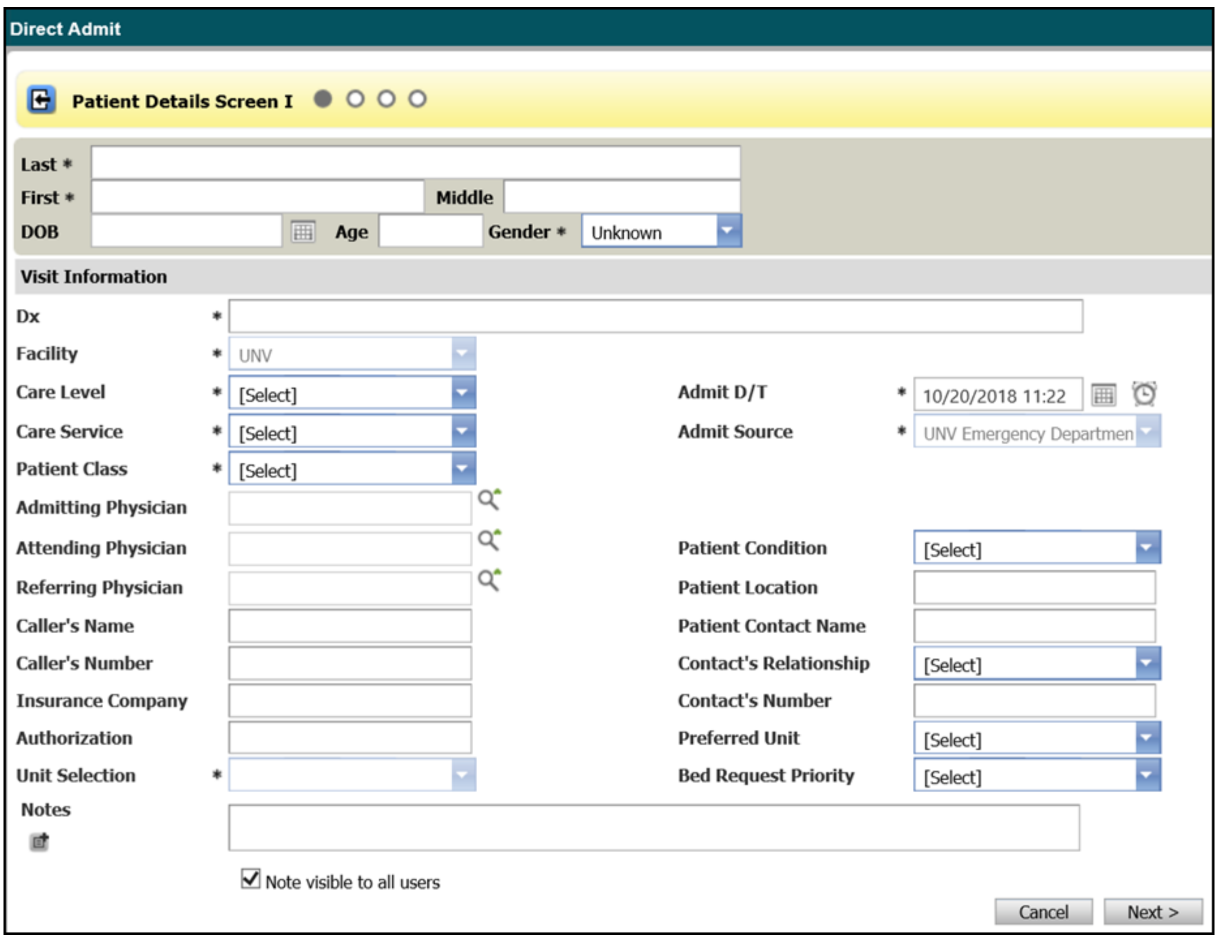


Create Direct Admit requests

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.



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.

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.

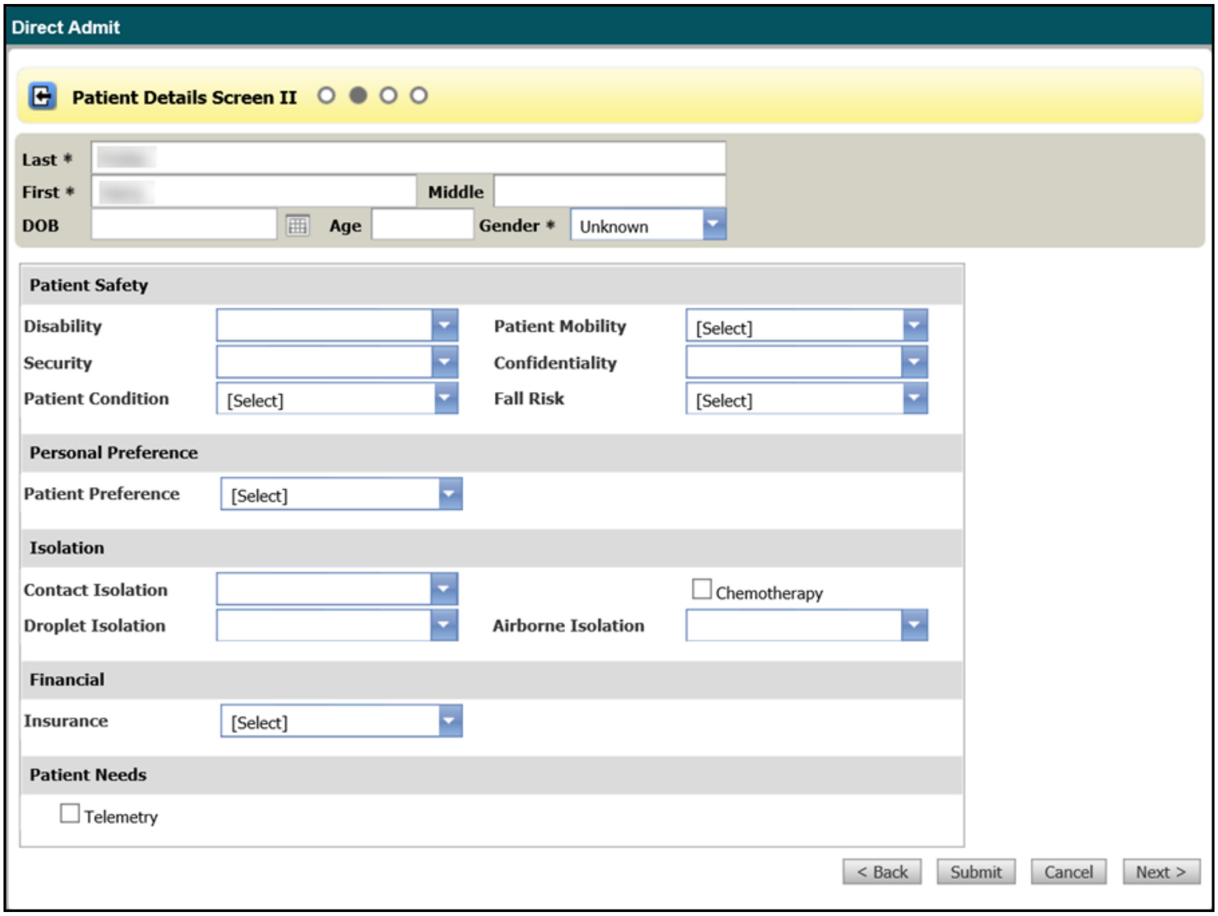
5. Enter required or optional information into the **Visit Information** section, as described in the following table.

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.

Field	Action
Care Service*	Select the care service required.
Patient Class*	Select the patient class. The default is **Inpatient**.
Admitting Physician*	Click to search for and select the admitting physician's name. **Note**: Depending on your settings, this field might not be required.
Attending Physician*	Click 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 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.

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.



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.

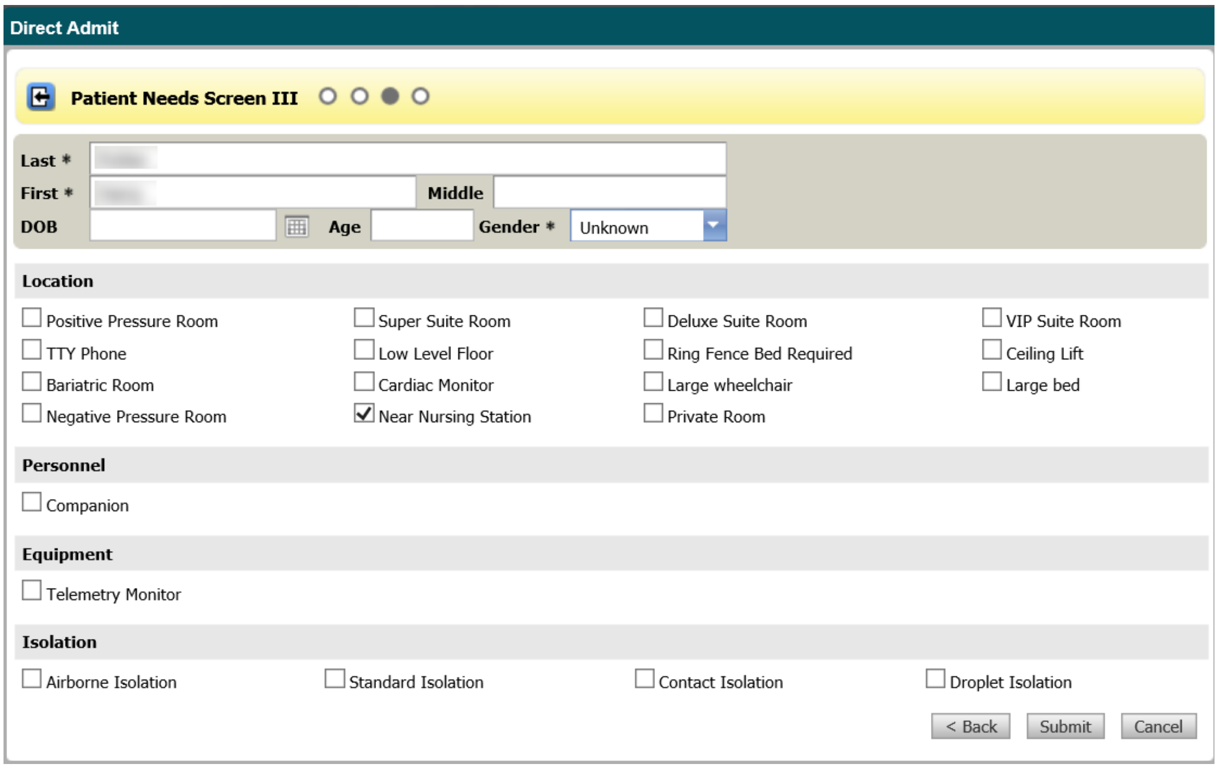
Field	Action
Confidentiality	Select multiple confidentiality details that apply to the patient.
Fall Risk	Select a value that specifies the patient's risk of falling.
Patient Preference	Select the type of room requested.
Contact Isolation	Select multiple contact isolation values.
Droplet Isolation	Select 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 < 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.

> **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.

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 < Back 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**.

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 (RM) is unavailable until the patient's admission request is complete and the admission icon (AD) 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**.

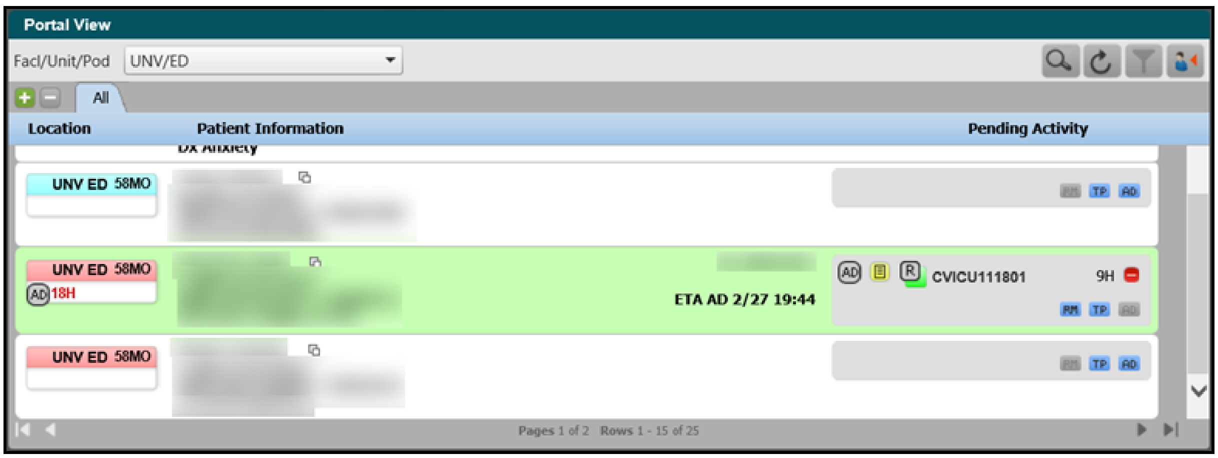
1. From **Portal View**, click RM under **Pending Activity**.

   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:

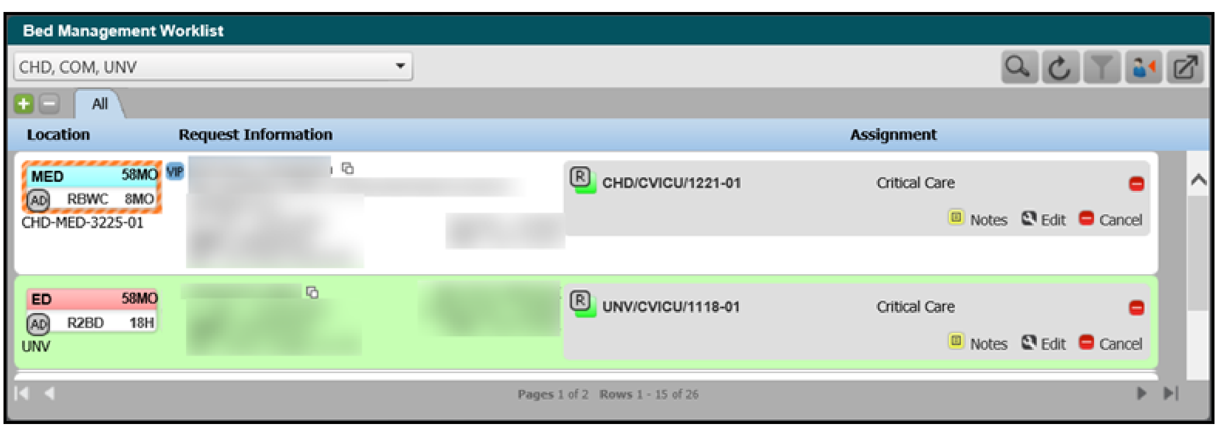
Error message	Problem
`MRN not provided.`	The Medical Record Number (MRN) is null or empty in the patient's record.
`Account Number is not provided.`	The Account Number was not provided.
`FacilityHL7Code not provided.`	The FacilityHL7Code not provided.
`UnitHL7Code not provided.`	The UnitHL7Code is null 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.

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.



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.

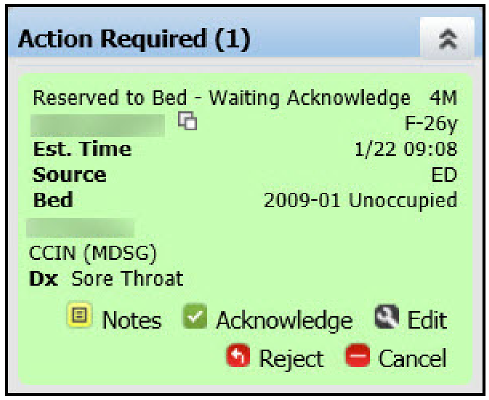


2. From **Bed Management Worklist**, select **Find Bed**.

   If necessary, use the applicable filters.

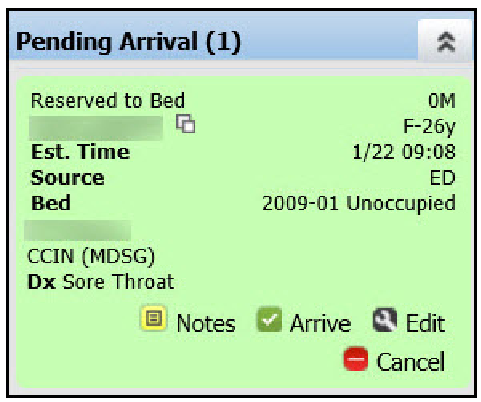
3. Select a bed and then click **Reserve**.

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



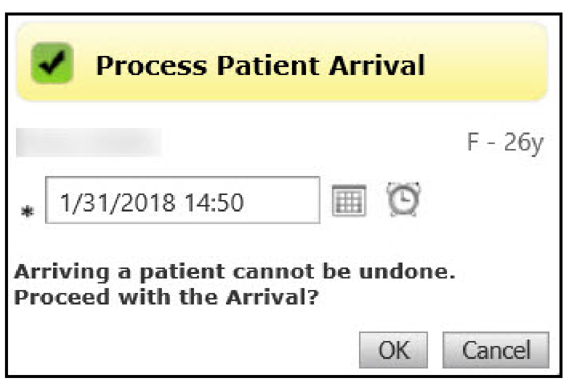
4. On the **Action Required** section, click **Acknowledge**.

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



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

   Process Patient Arrival opens.



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 TP in the **Pending Activity** column.

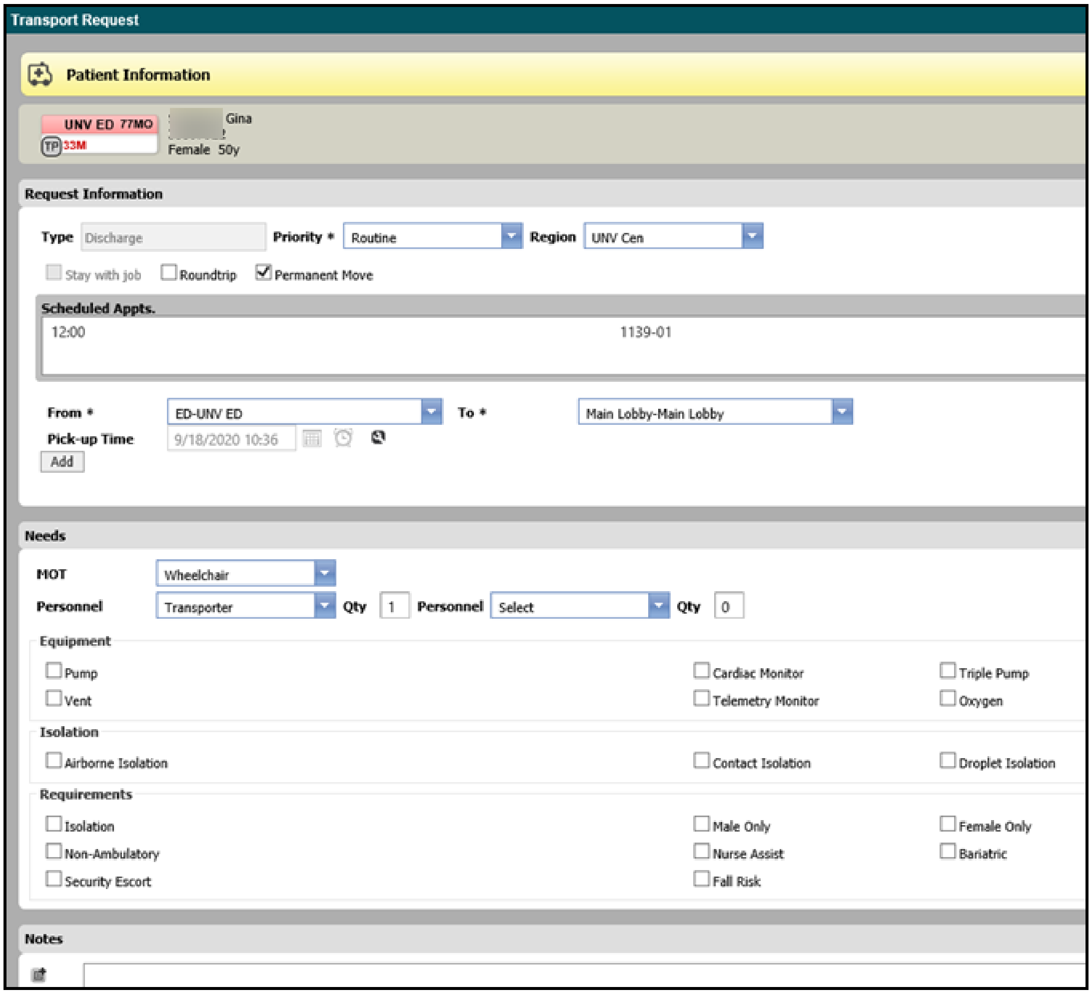
   The **Transport Request** window opens.
4. For **Request Type**, select a transport type from the list (for example, **Discharge**).

   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.



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 to select a time.
       > Click to unlock a field.
       > Click to open **Schedule**, where you can view or change the transport request time.
       > Click 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).

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.
MOT	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 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 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**.

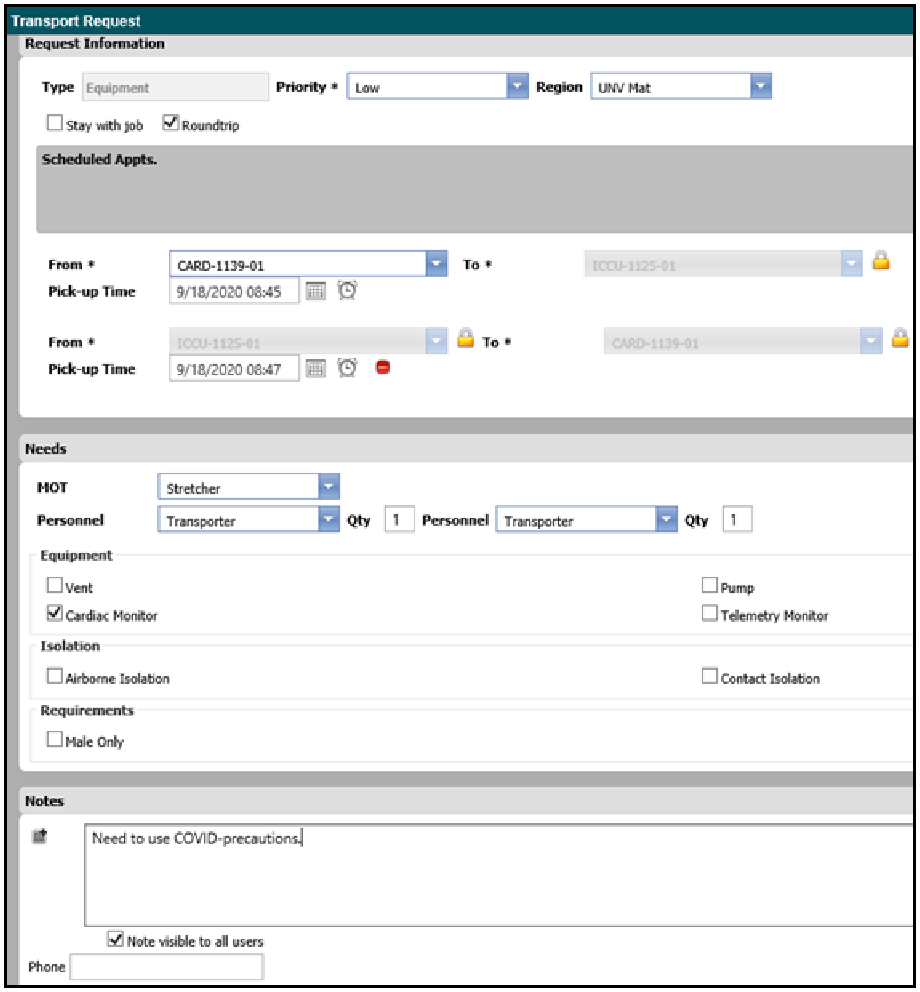
The following steps use the example of a **Equipment** transport type. Depending on your organization's setup, transport types vary and might have different fields.

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 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.



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**.

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 to remove a field.

d. If **Roundtrip** is selected, enter information into the **From** and **To** fields on the second row.

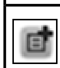
   By default, the transport type's duration is added to the first leg's date and time to calculate the second leg's date and time.

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).

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

If the transport is round-trip or has multiple legs, a 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 on the patient tile or under **Pending Activity**.
3. On the **Transport** window, click Edit .
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 to unlock a field.

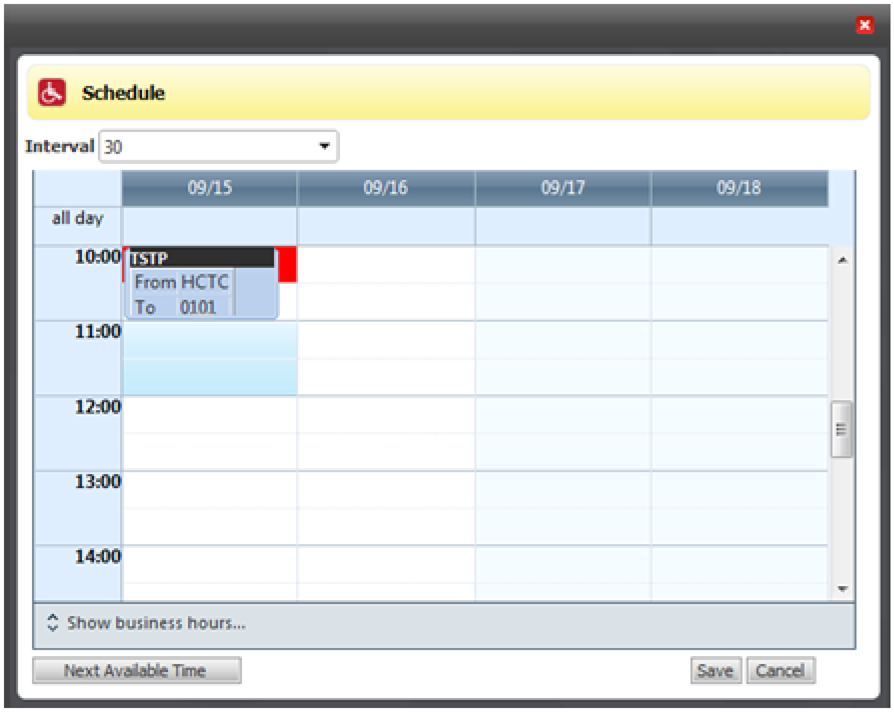
      > Click to remove a field.

   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.



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

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

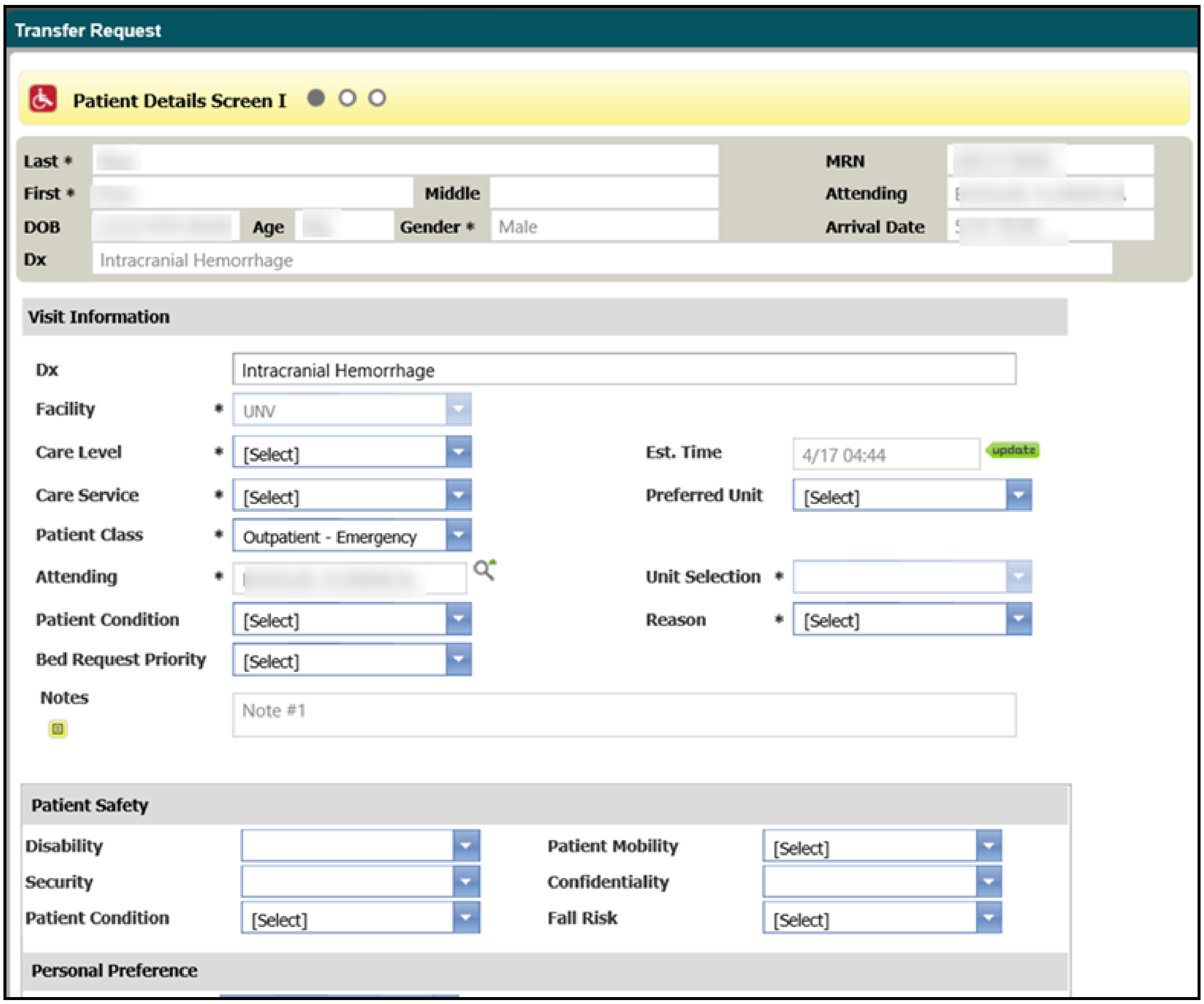
Request patient transfers

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 TX 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.

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



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 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 and select the date. To change the time, click 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.

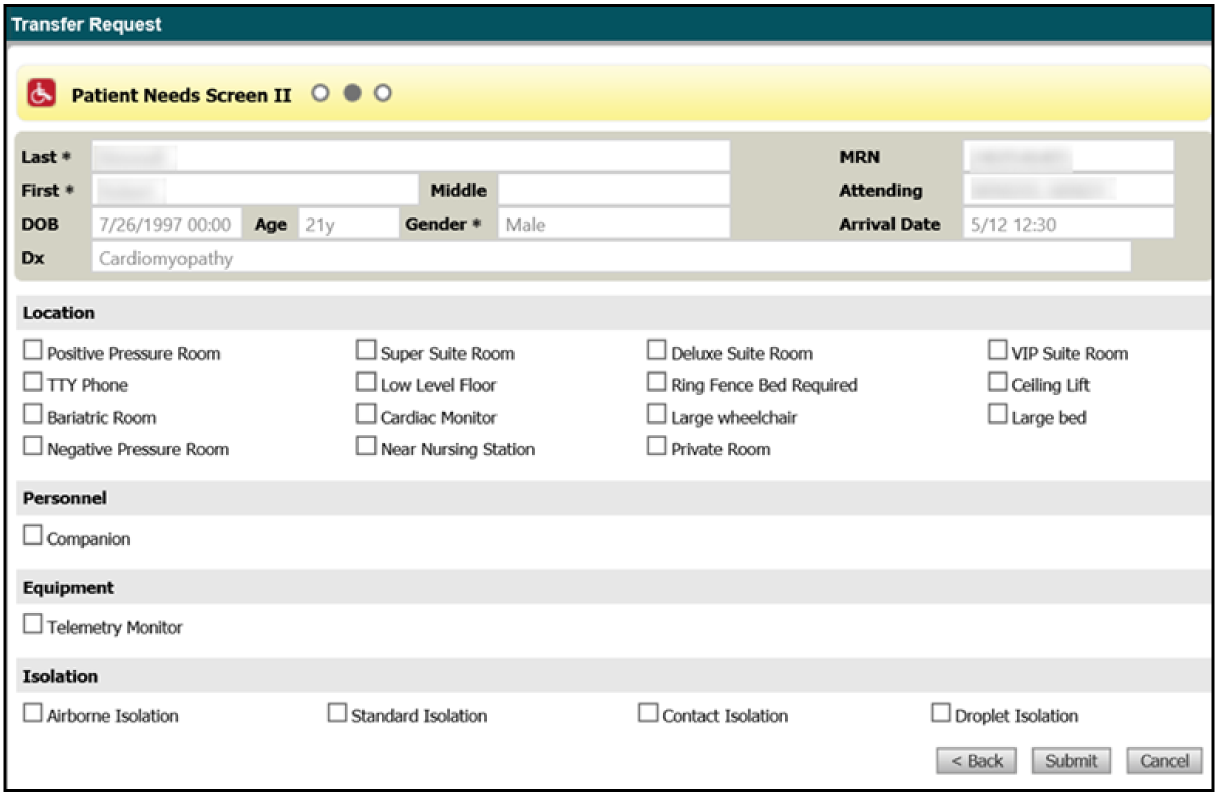
Field	Action
Patient Mobility	Select a mobility option.
Fall Risk	Select the fall risk option.
Security	Select the applicable security options.
Contact Isolation	Select the applicable contact options.
Droplet Isolation	Select the applicable isolation options.
Chemotherapy	Select the applicable chemotherapy 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 (Tx) 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.



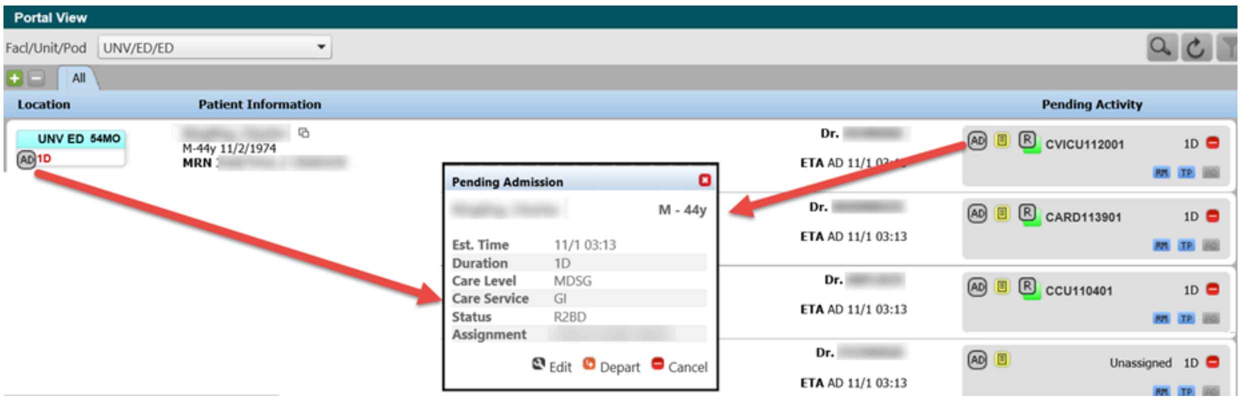
7. If applicable, select any box to enter more data.
8. Review the information for accuracy and do one of the following:
   > If the information is correct, go to Step 9.
   > If the information is incorrect, enter the correct information.
9. Click Submit

   Patient Details Screen II closes, and **Portal View** is displayed. The transfer icon (Tx) 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 AD 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



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, Edit.

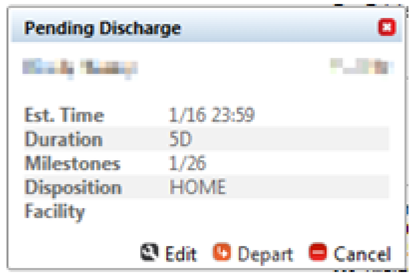
To cancel a request, you can either click Cancel or you can click the **Cancel** button for that request in the **Pending Activity** column on the patient row. A window then displays to request a reason for the cancellation. Select a reason, click **OK**, and the request is canceled.

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.

Pending Discharge is displayed.

Figure 3: Pending Discharge Window

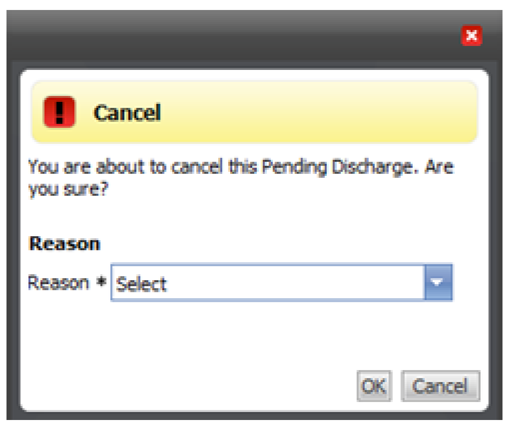


2. Do one of the following:
   > To cancel the pending discharge, go to Step 3.
   > To edit the pending discharge information, go to Step 6.
   > To depart a patient, go to Step 8.

3. Click Cancel.

   Cancel is displayed to request confirmation.

Figure 4: Cancel Window



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

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

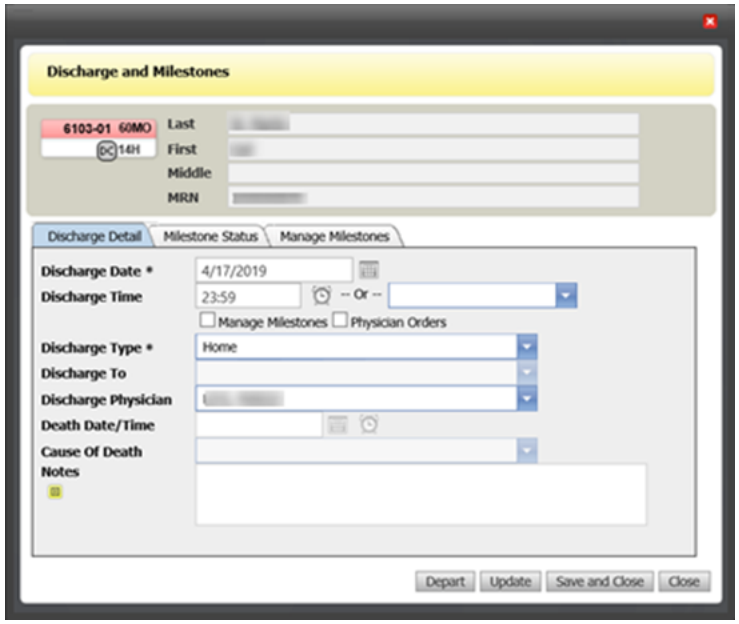
5. Click **OK**.

   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



7. Do one of the following:

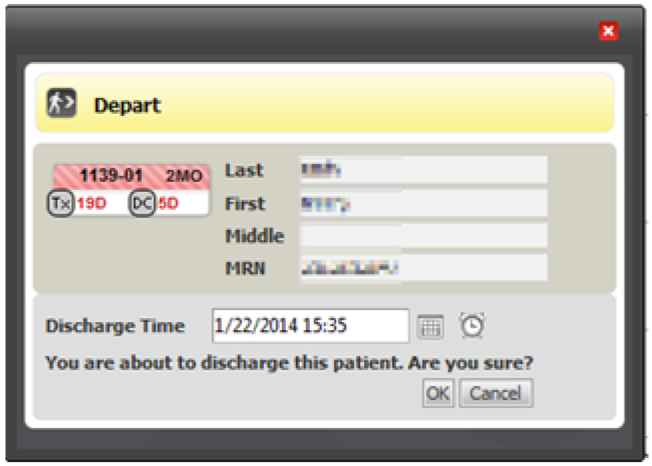
> To change discharge information, enter the changes in the applicable boxes and click **Save and Close**.
> **Pending Discharge** closes and the information is saved. **Portal View** displays the patient row, and the **Discharge** icon and timer still display in the patient tile and in the **Pending 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**.

Accept is displayed to request confirmation of the discharge.

Figure 6: Depart Window



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

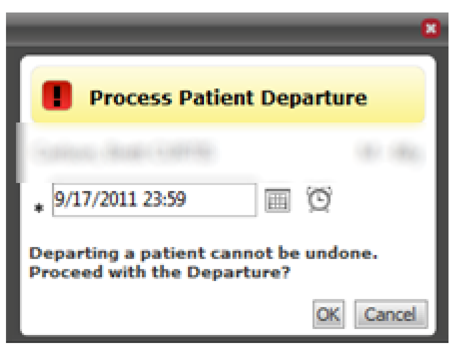
> **Note:** When you click, you cannot cancel or make any other changes to the discharge.

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 Depart on **Pending Discharge**.

   Process Patient Departure for the patient is displayed.

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.

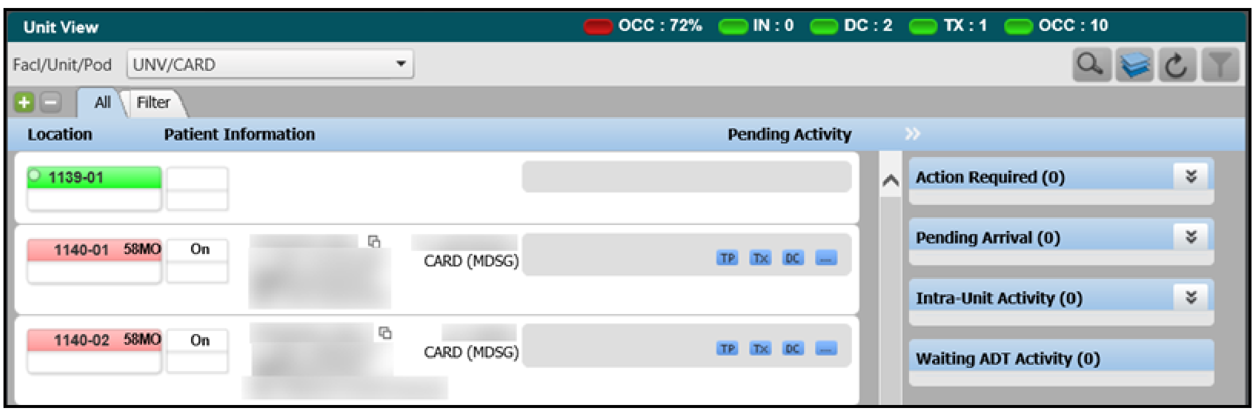
Chapter 5

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.

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  to view the floor plan for the 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.

The information in the **Dashboard Header** is configurable by the Allscripts Patient Flow™ Implementation Team (not by the administration functions in Allscripts Patient Flow™). 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.

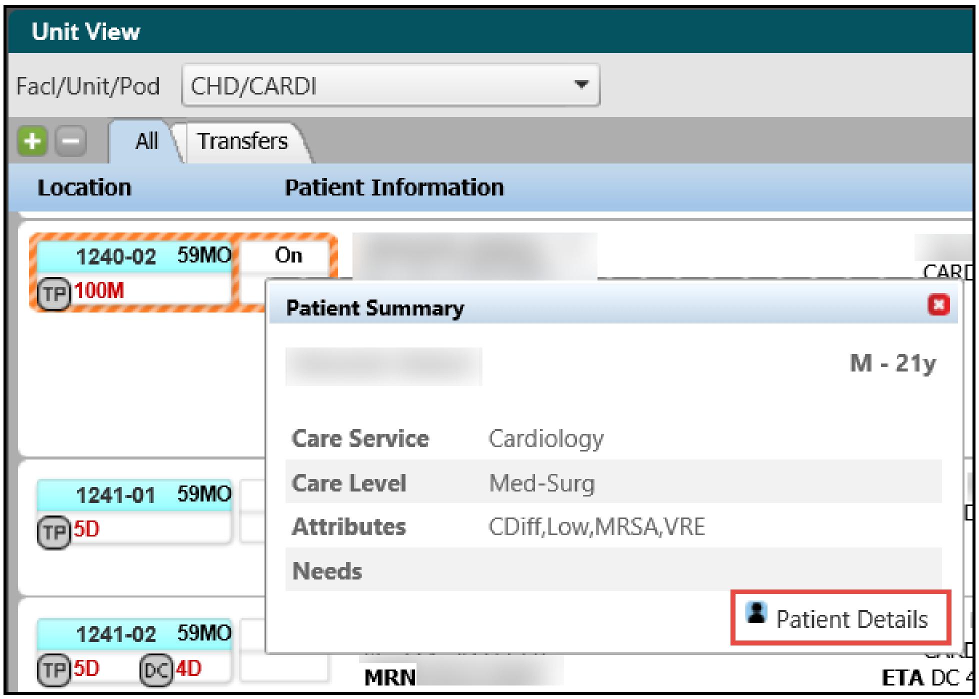
Header value	Description
OCC: *% value*	When a facility is selected, displays the percentage of the facility's beds that are occupied. The expanded view displays separate charts for **OCC: *% value*** by: > Pod: The unit's occupancy percentage by pod > Unit: The occupancy percentage by unit for all units 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

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.

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-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

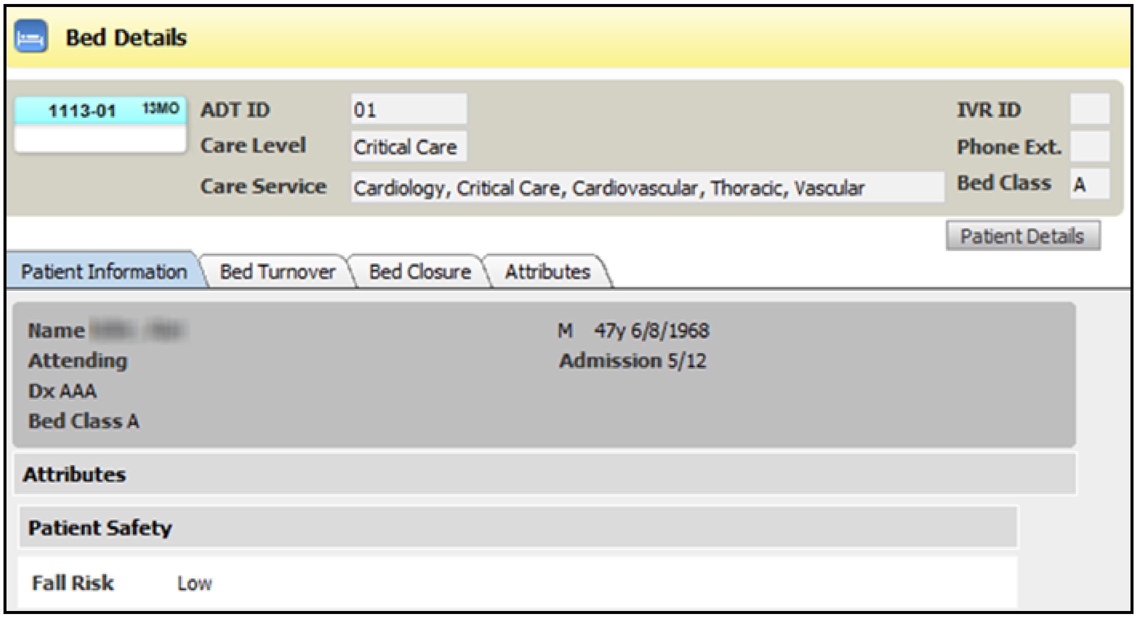
- TX: Opens **Transfer Request**, where you can create a **Transfer** request for the patient or update the patient's details.
- TP: Opens **Transport Request**, where you can create a **Transport** request for the patient.
- DC: Opens **Discharge and Milestones**, where you can create a **Discharge** 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.

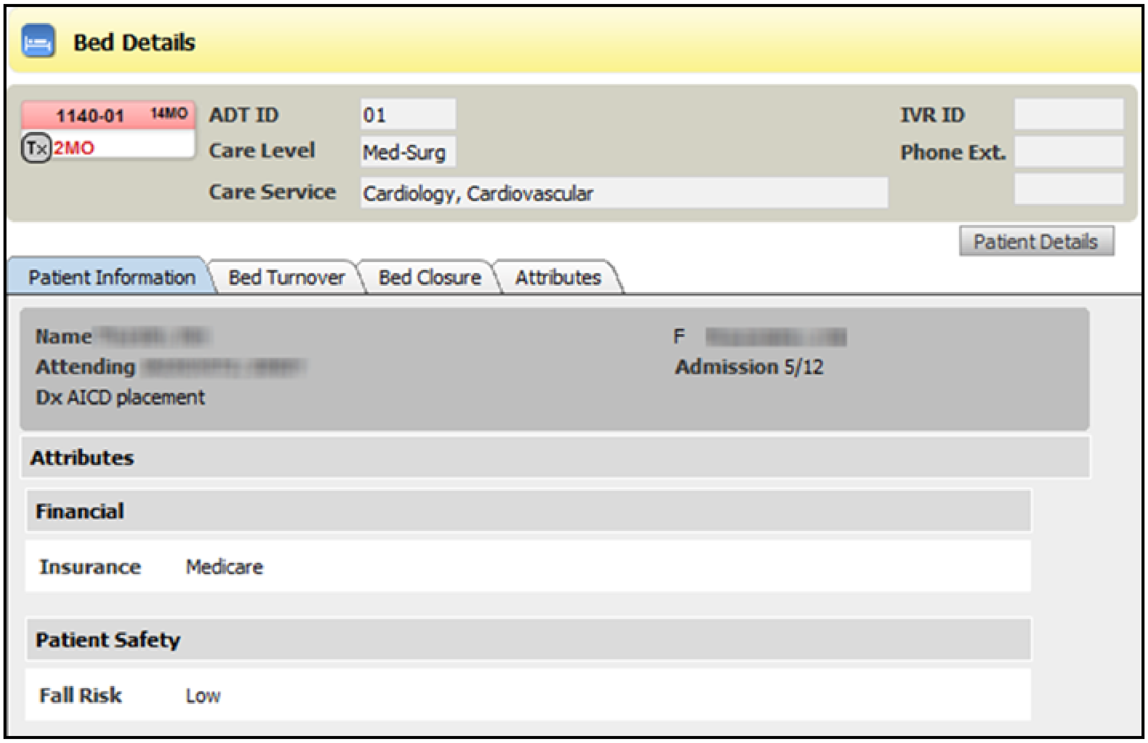
  Click **Change Room/Bed** to open **Change Room/Bed**, where you can reassign the patient to another bed location.

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

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.

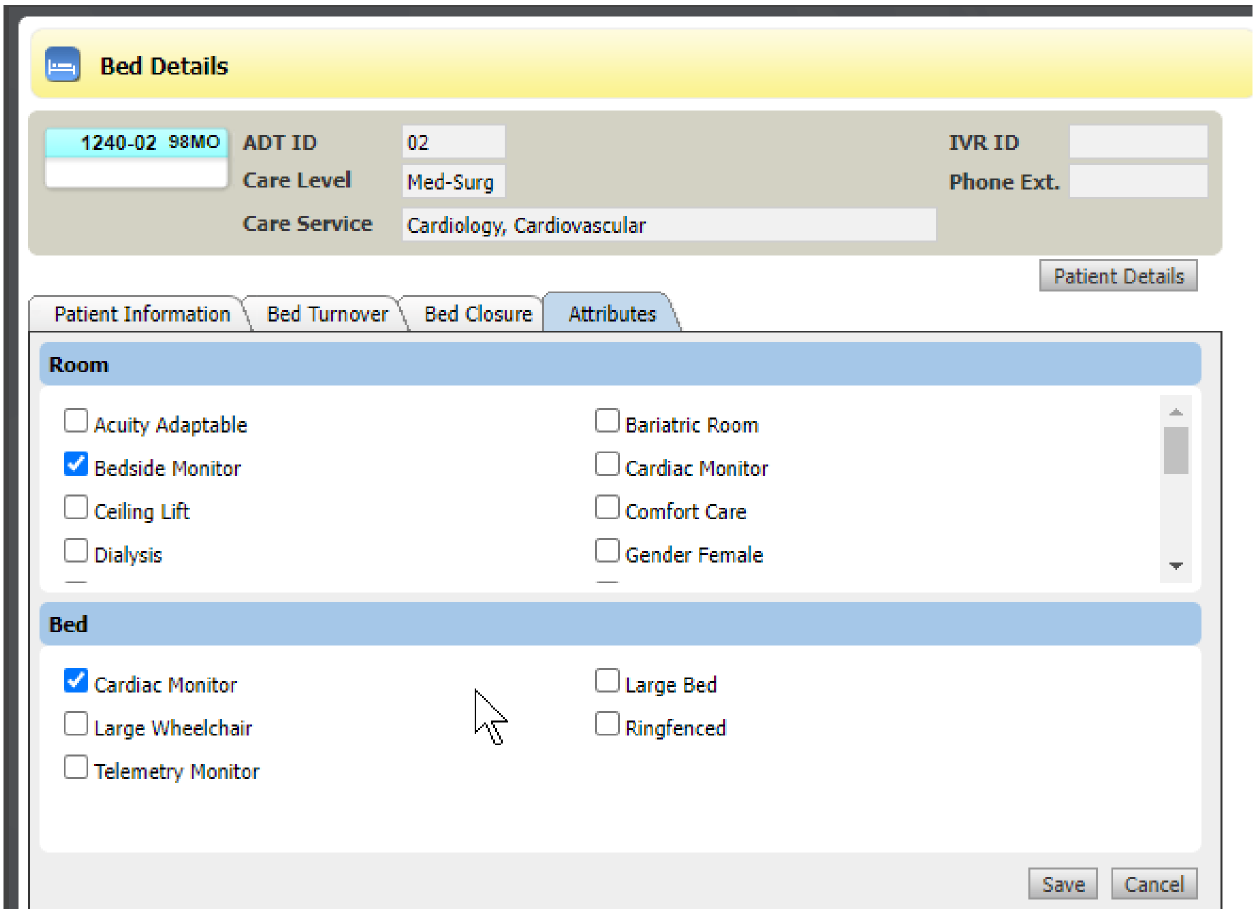




If the patient is in the bed, the **Patient Information** tab is displayed as the first tab. View details such as the patient's attending physician, attributes, financial, or safety information. Complete other actions from **Bed Details**:

> 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.



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.

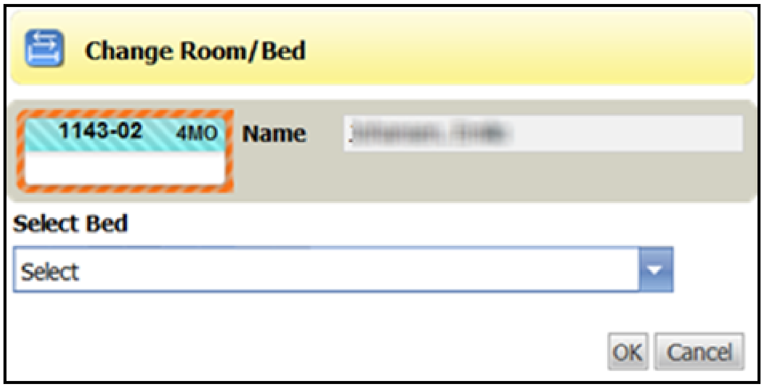
> The bed is not occupied by another patient. If so, you can use a bed swap workflow.

> 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 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**.

Change Room/Bed opens.



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 

   .

   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`.

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.

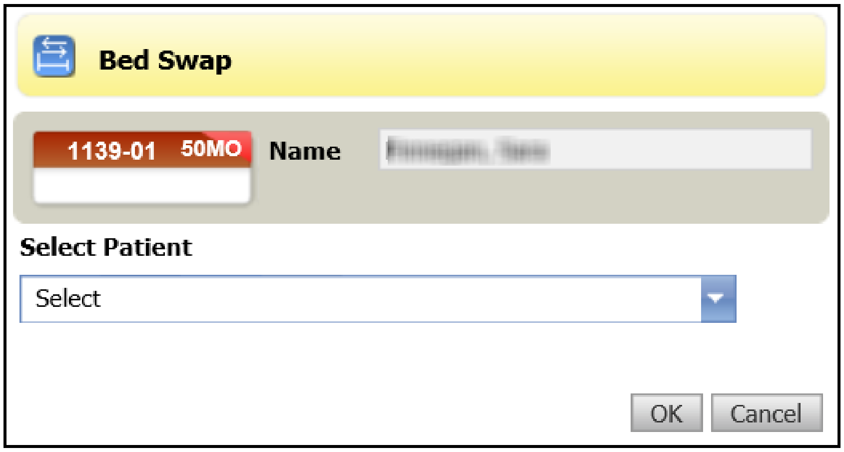
1. In the Bed Management module, click **Unit View**.

2. Locate the patient and click 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.



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`.

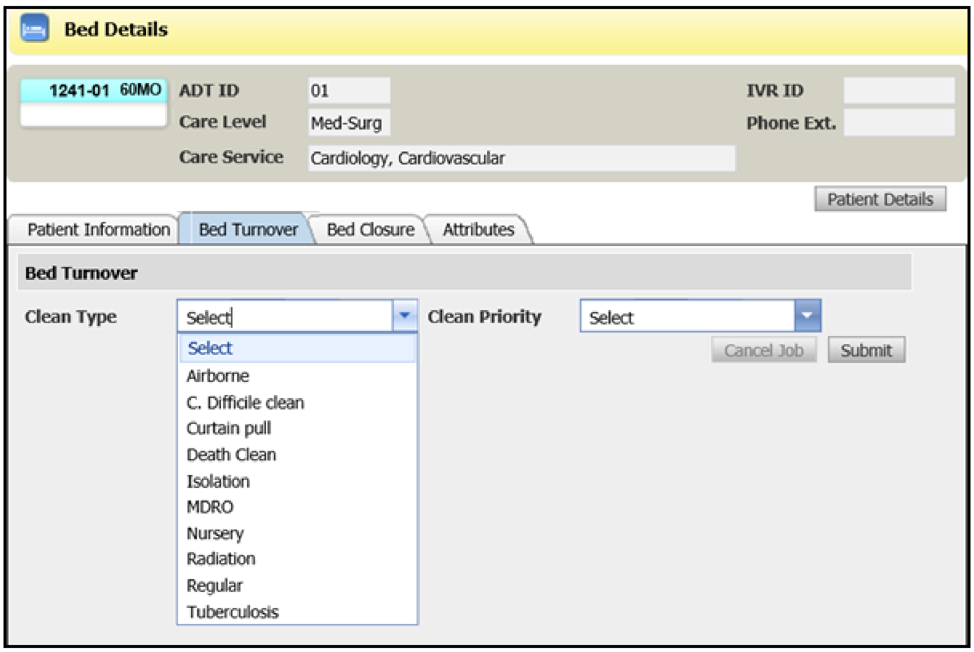
Request bed cleanings

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**.
2. On the patient's tile, click the bed ID.

   Bed Details is displayed.
3. Click the **Bed Turnover** tab.



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.

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.
5. (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 TX 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.

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 () 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.
4. 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 () 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.
6. 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, 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.

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.

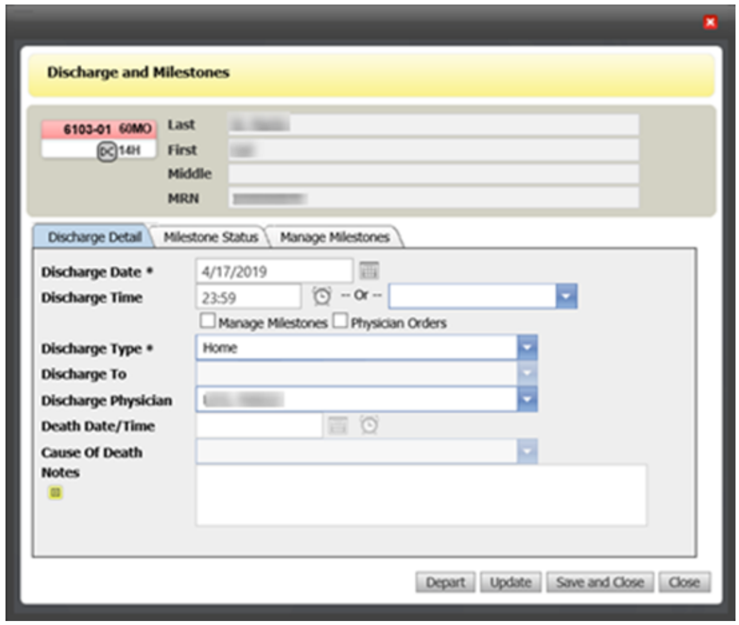
For example, click  for a transfer request, which displays a page with some patient details and enables you to select an action. Click the applicable action (for example, ). To cancel a request, click  on this window or click **Cancel** for that request in **Pending Activity** on the patient row. A page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

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

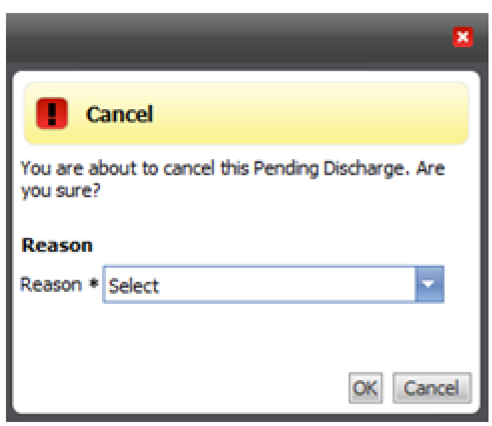
Figure 10: Discharge and Milestones



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**.

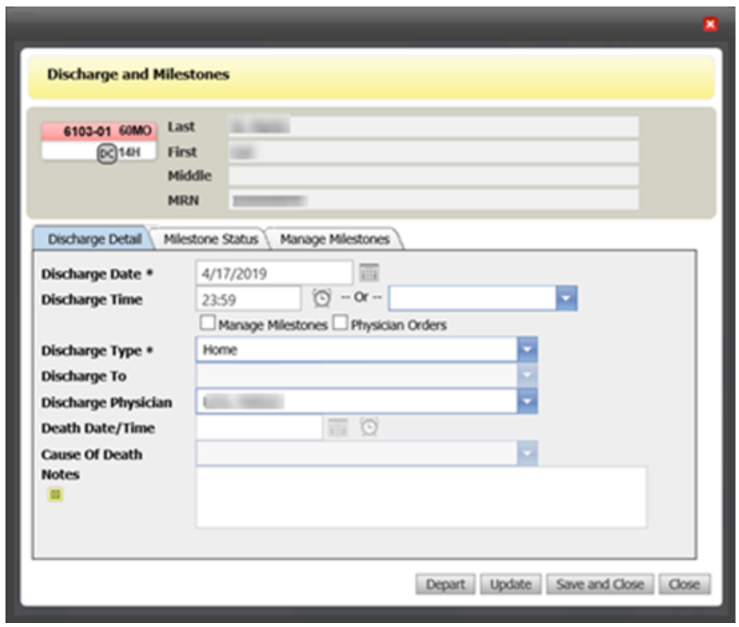
Figure 11: Cancel



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

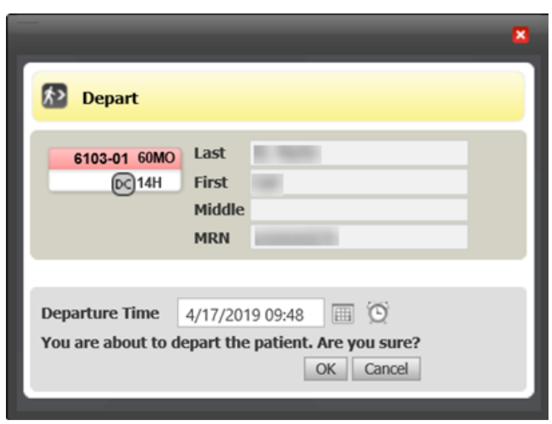
   The pending discharge is cancelled, and **Cancel** closes. **Unit View** displays the patient row, and DC and timer are removed from the **Patient Tile** and **Pending Activity**.
6. Click Depart .

Figure 12: Discharge and Milestones



7. Click **Depart**.

Figure 13: Depart



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

Process Patient Departure closes and the patient is departed. **Unit View** displays the patient row. All patient information is removed from the row, including 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 Pending.
Physician Orders	Select if the discharge is under physician orders.
Notes	Enter any notes associated with the discharge.

Data	Purpose
Note visible to all users	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 DC 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

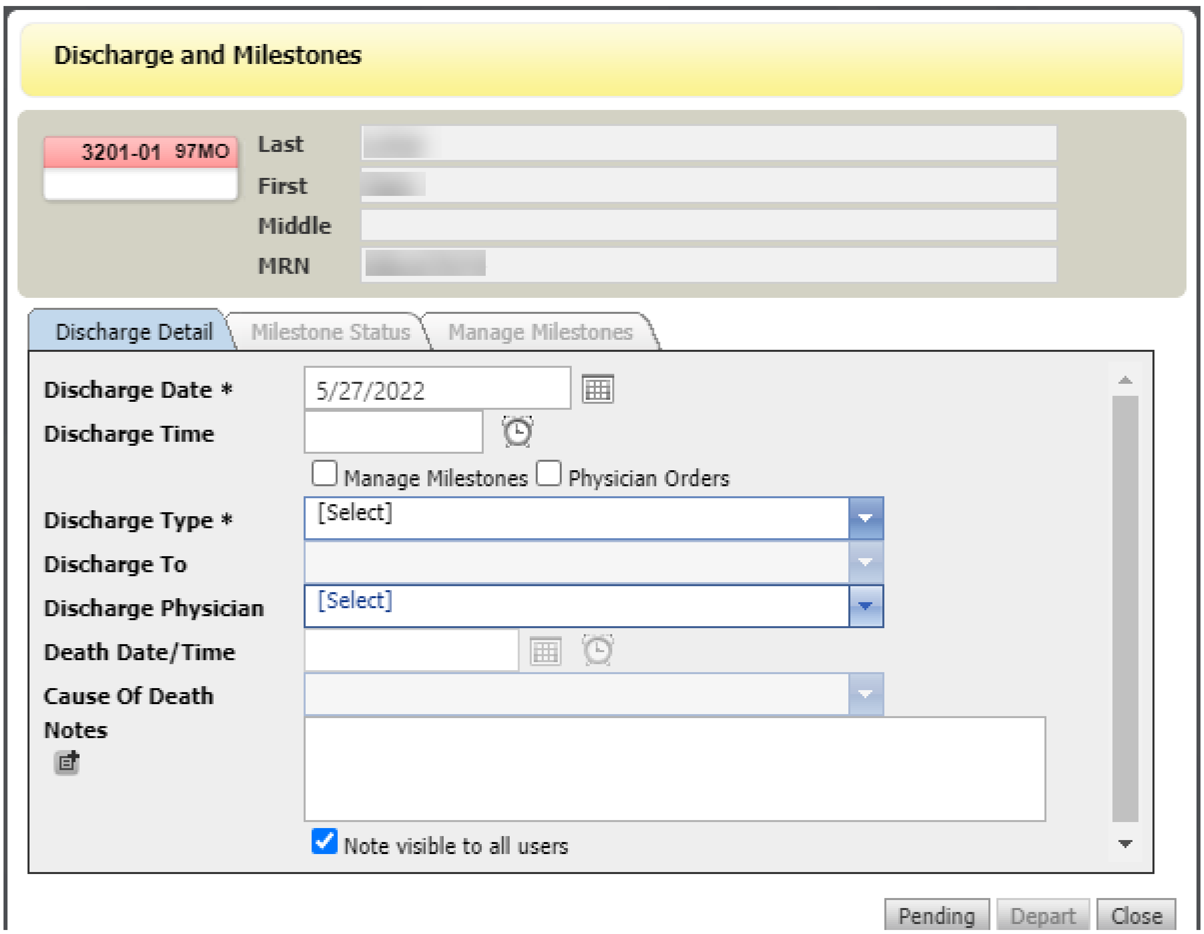
Requesting a patient transport or a material transport for a patient using **Unit View** is similar to requesting it using **Portal View**.

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 DC in the **Patient Tile** or in **Pending Activity**.

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  or  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.

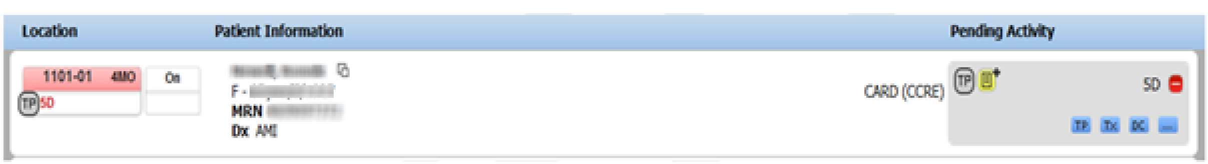
Move a patient off floor

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.

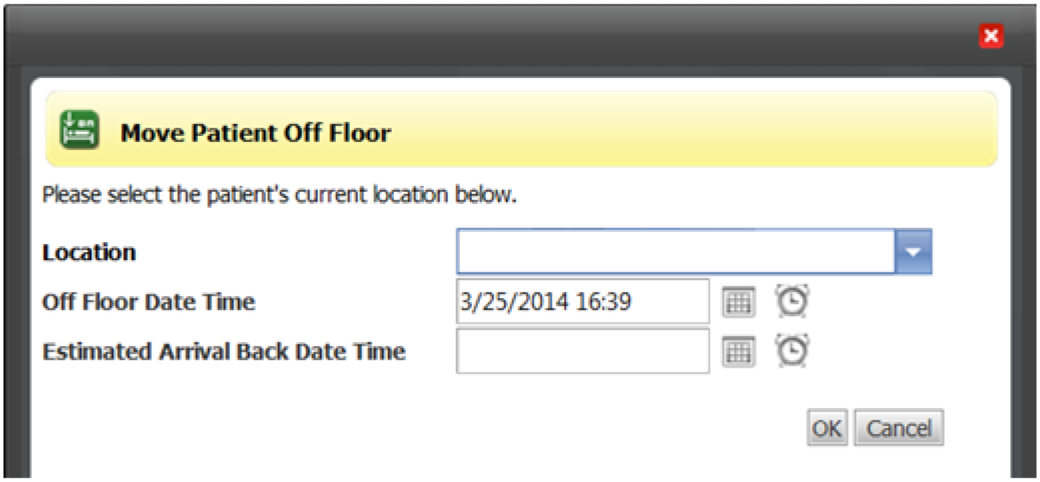
   Figure 15: Patient Information Window

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

Move Patient Off Floor is displayed.

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

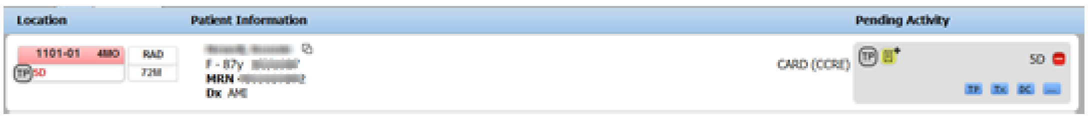


Figure 18: Move Patient Off Floor

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

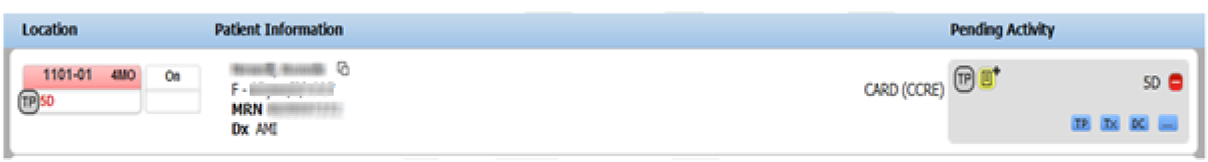
   

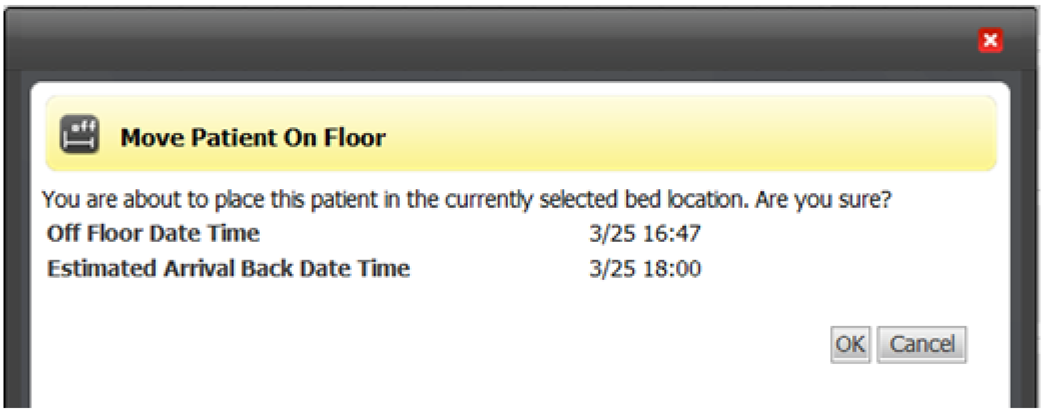
   Figure 20: Patient On Floor

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

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

Figure 21: Move Patient On Floor



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

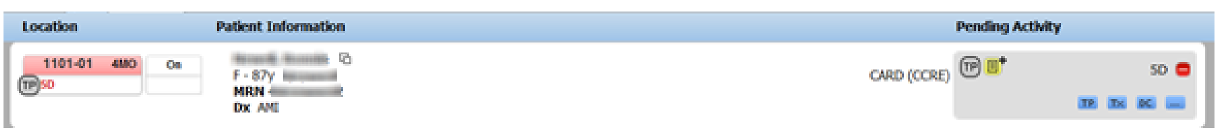


Figure 23: Patient Information

Unit View-unit activity sections

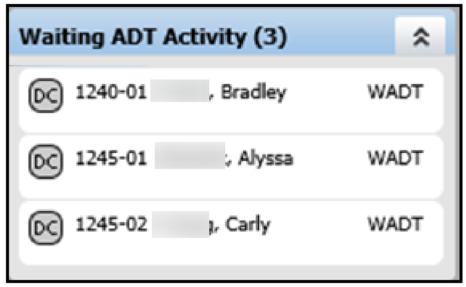
Unit View is the only page that displays a unit activity section. Use these sections to view patient activities for the selected unit in the **Facl/Unit/Pod** list.

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

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

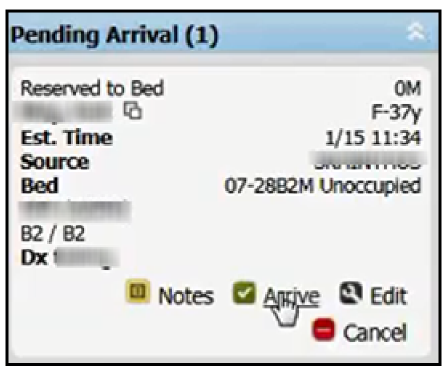
If any of these types of activities are pending, the section expands slightly to display the patient's name and a few other details. The number of each activity type is displayed in parentheses on the right of the section heading.

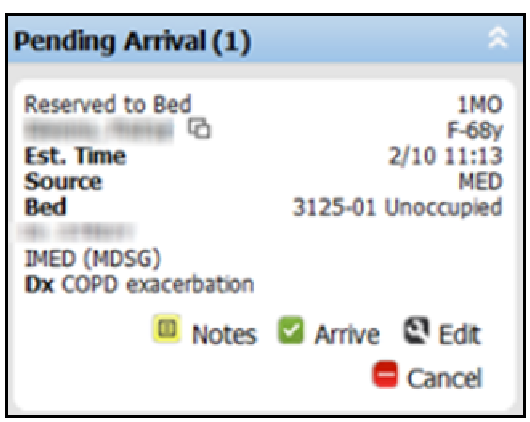
The following image displays an example of the **Waiting ADT Activity** section, in which three activities are pending.



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.





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
> 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.

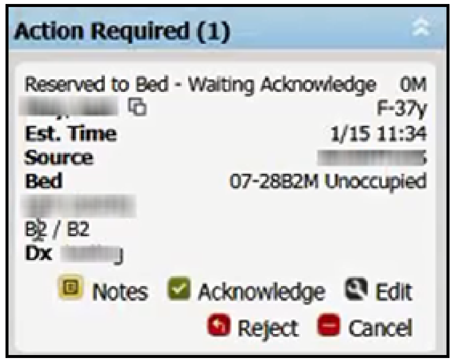
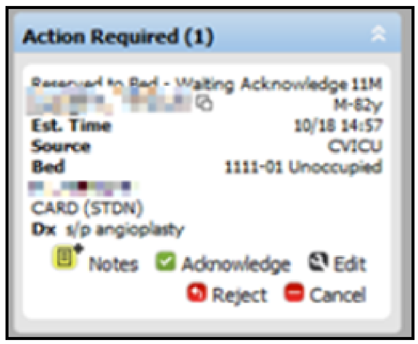


Figure 24:



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.

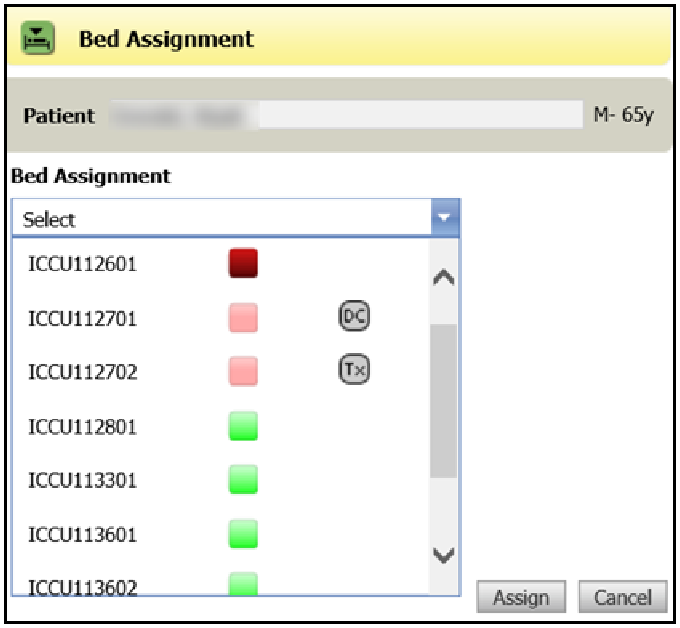
Change bed assignments

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.

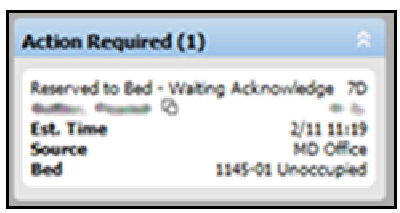


4. To select a different bed, expand the **Select** list and choose another bed.

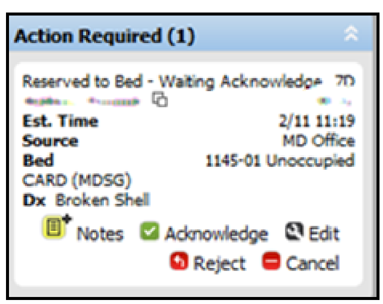
   The different bed assignments, including those with a discharge or transfer (outbound) workflow, display in the **Bed Assignment** field.

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.

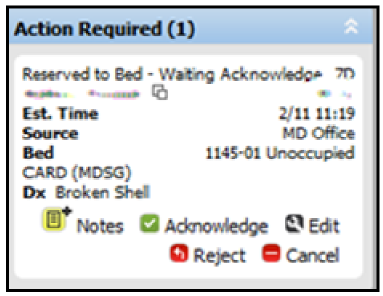


Reject bed reservations

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.



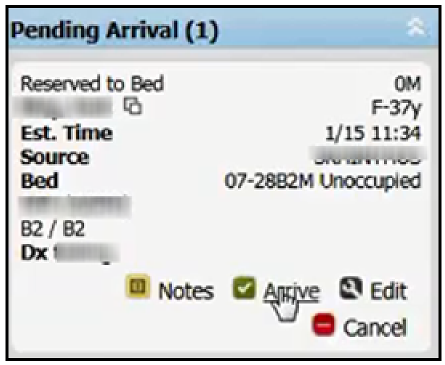
3. To reject the patient's bed reservation, click **Reject**.
4. On the **Reject** window, select a reason for the bed reservation rejection.

   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.



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

- 

- 

- 

- 

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.

Figure 25: Pending Arrival

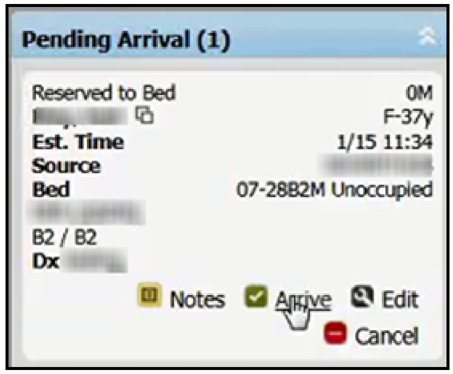
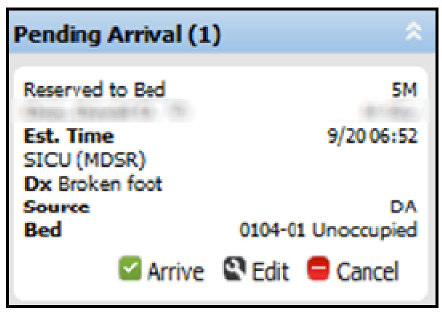
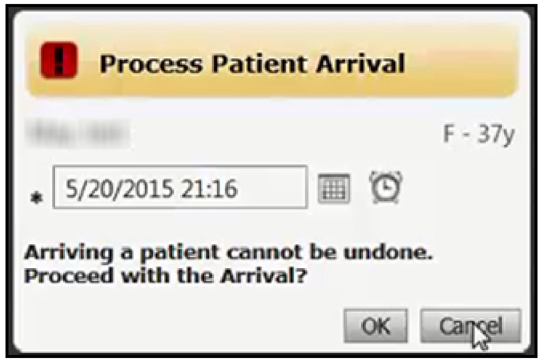


Figure 26: Pending Arrival



3. (Optional) If necessary, use any of the optional actions:
   - To add notes to the bed reservation, click Notes.
   - To edit the bed reservation, click Edit.
   - 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.



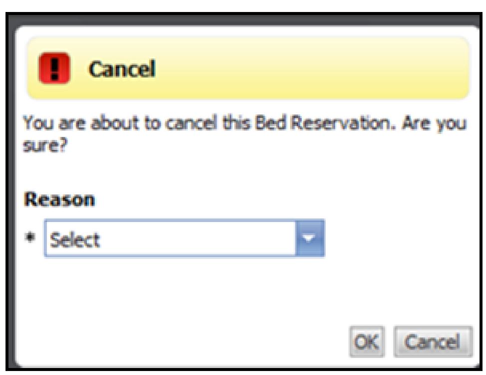
5. (Optional) If necessary, click the calendar or clock icons to update the date and time of the arrival.
6. Click **OK**.

   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.



4. 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 

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 

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 

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.

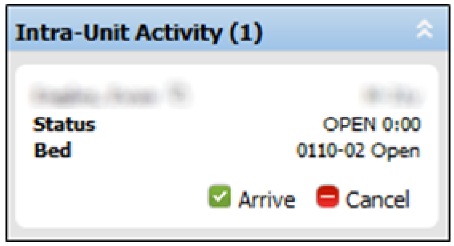
Arrive patients to beds

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.



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.

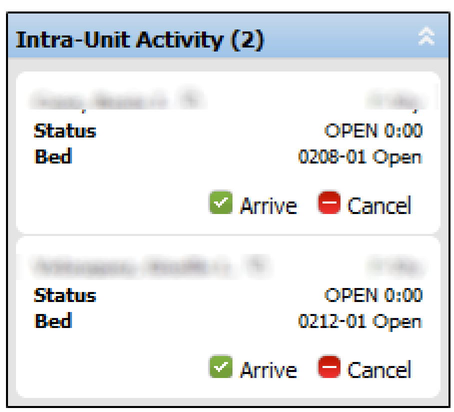
Arrive patients for bed swaps

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.

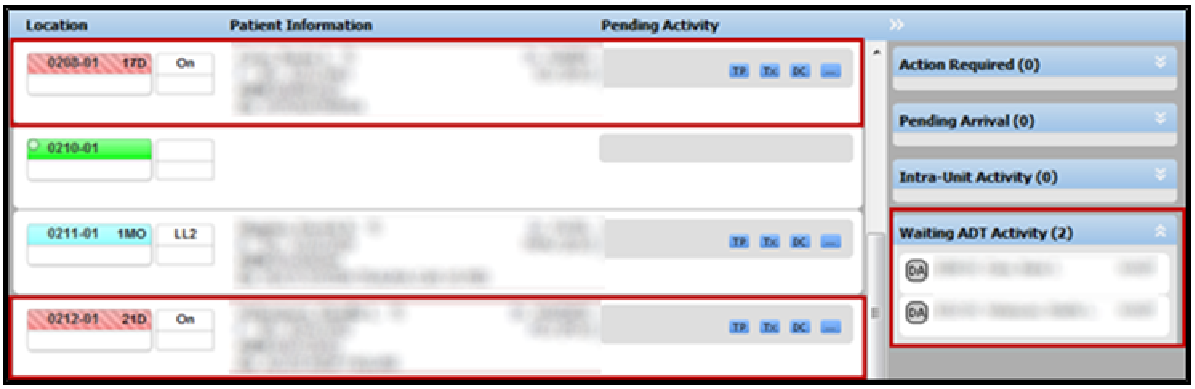


3. Click Arrive for each patient.

   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.



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.

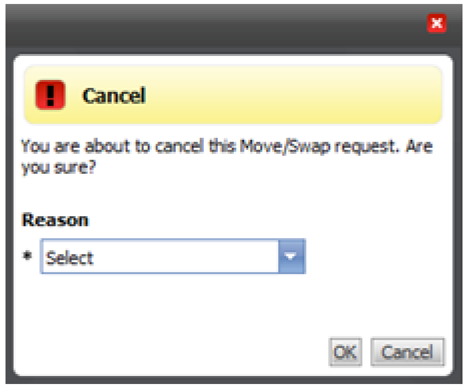
   The row expands and displays the available actions. For a **Change Room/Bed (Move)** request, only one patient is displayed. For a **Bed Swap** request, the two patients to swap rooms or beds are displayed.
4. To cancel the request:

   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.



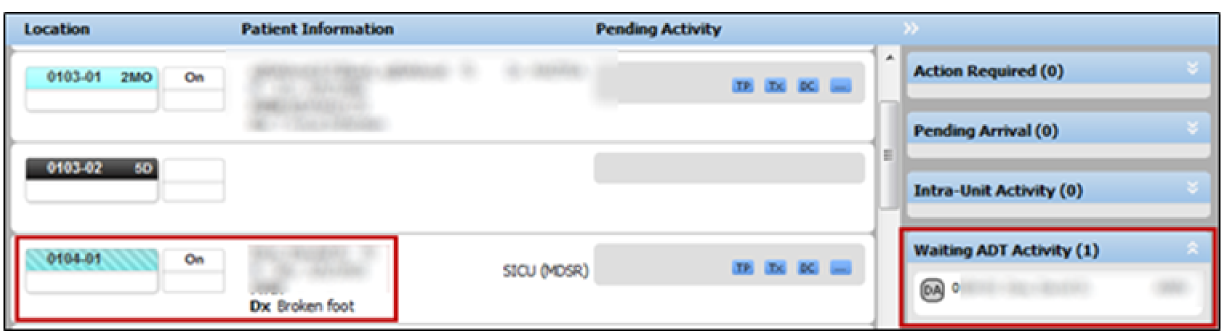
5. For **Reason**, select a value from the list.
6. Click **OK**.

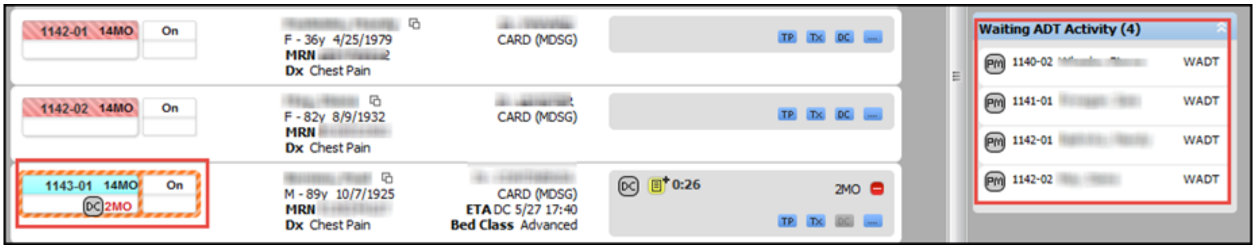
   The **Change Room/Bed (Move)** or **Bed Swap** request is cancelled. The information for the patient is removed from the **Intra–Unit Activity** section, and the patient remains in the current bed location.

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.





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 (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**.

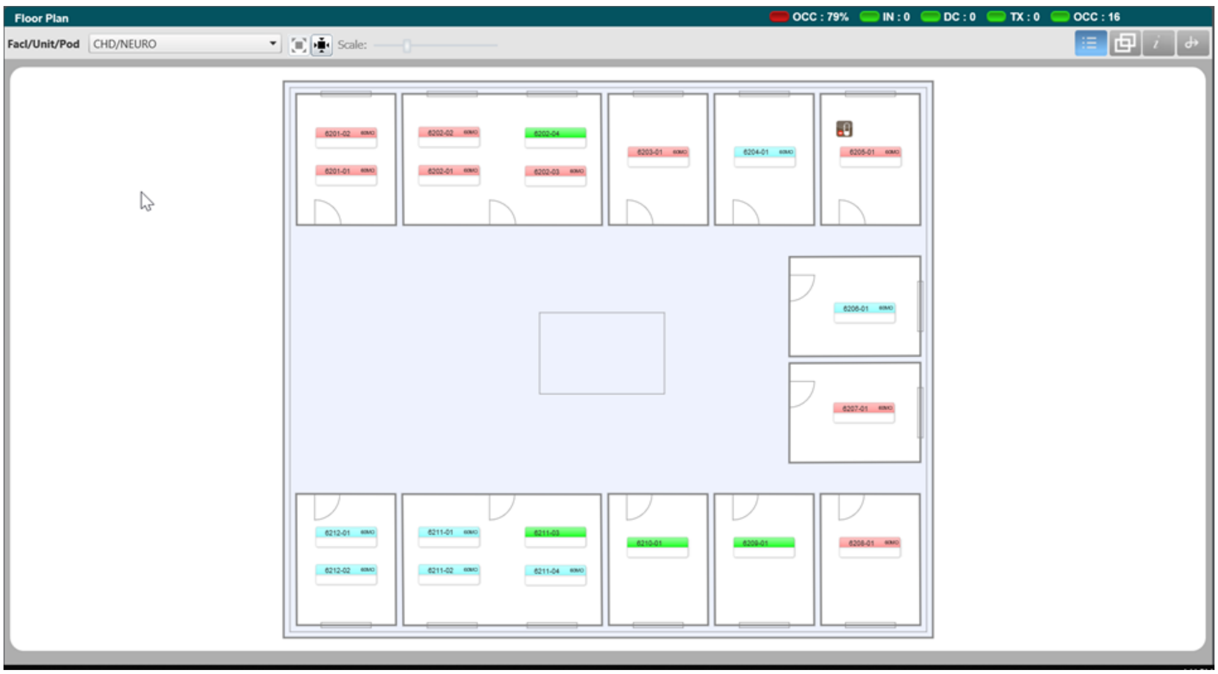
The following procedures assume **Floor Plan** is displayed. Prior to starting these procedures, you must click **Facl/Unit/Pod** on **Floor Plan** and select the applicable unit to display the unit's **Floor Plan**.

Use the Manual Scale function

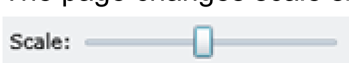
The Manual Scale function enables you to resize the Floor Plan manually.

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

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 

   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.

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

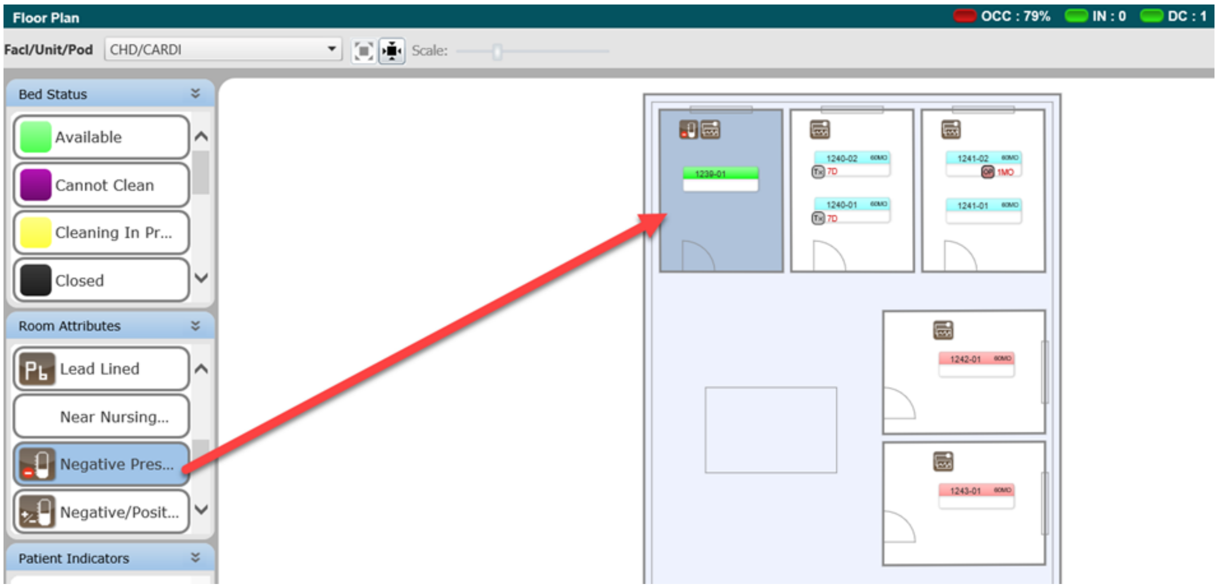
Figure 28: Bed Status and Room Attributes

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

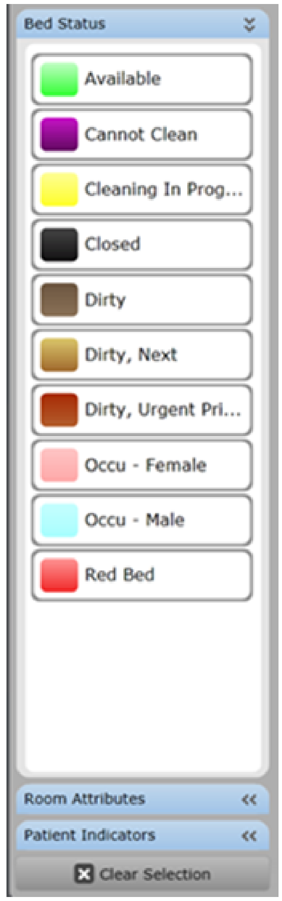


3. To clear a selection, click 

at the bottom left.

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



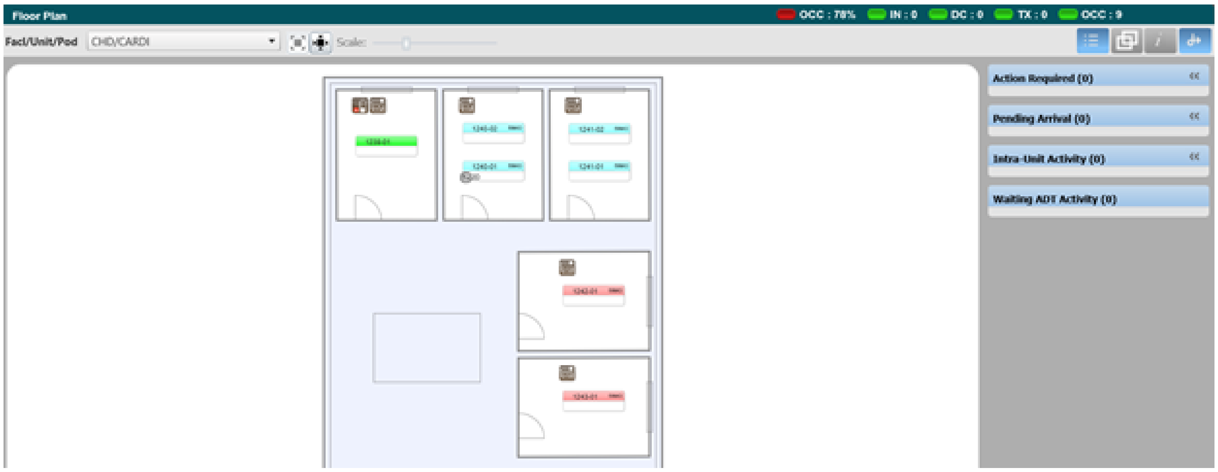
Use the Workflows function

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.

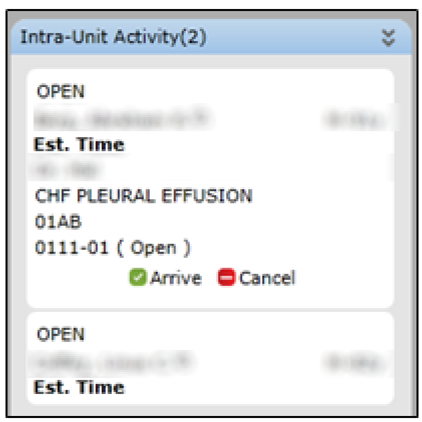
Figure 31: Floor Plan Window



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

   The patient's row expands to show more details.

Figure 32: Intra–Unit Activity

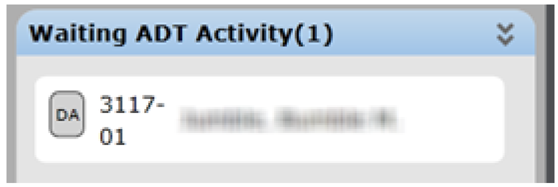


3. To perform an action for the patient, click the applicable button at the bottom of the pane, for example, .

What happens next depends on the action taken. If 

was clicked, the patient arrives in the applicable bed. Then **Waiting ADT Activity** displays the patient's activity.

Figure 33: Waiting ADT Activity



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.

Figure 34: Bed Details Window

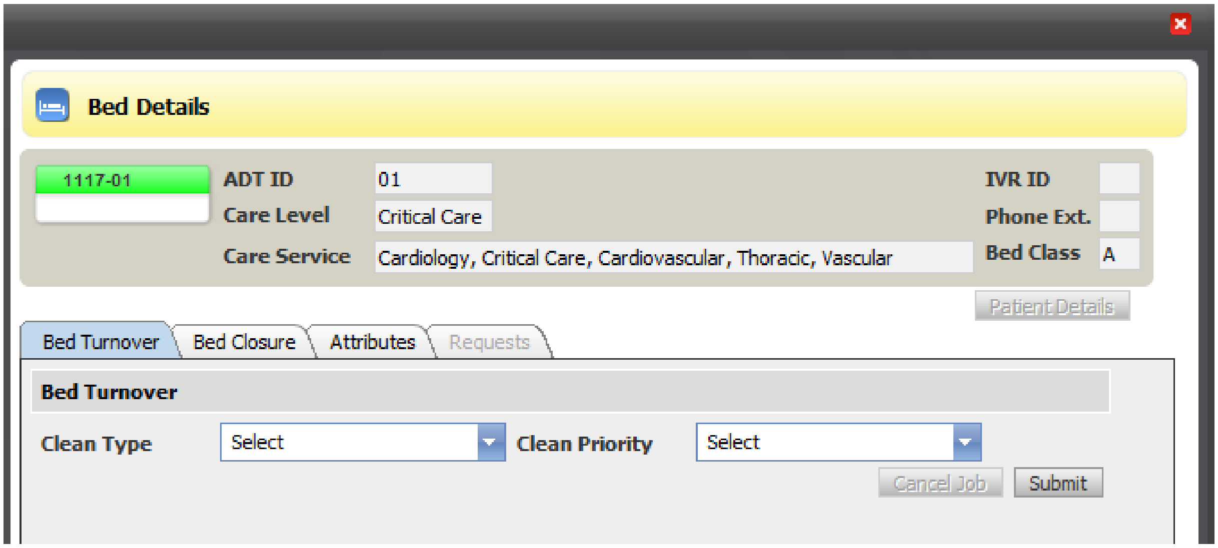
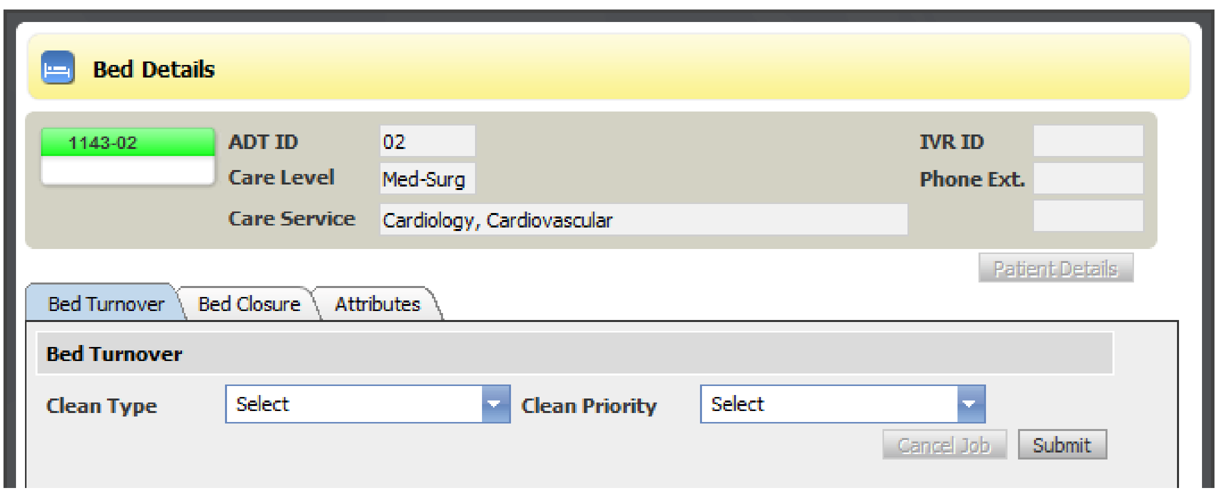


Figure 35: Bed Details Window



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.

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

Figure 36: Bed Details Window

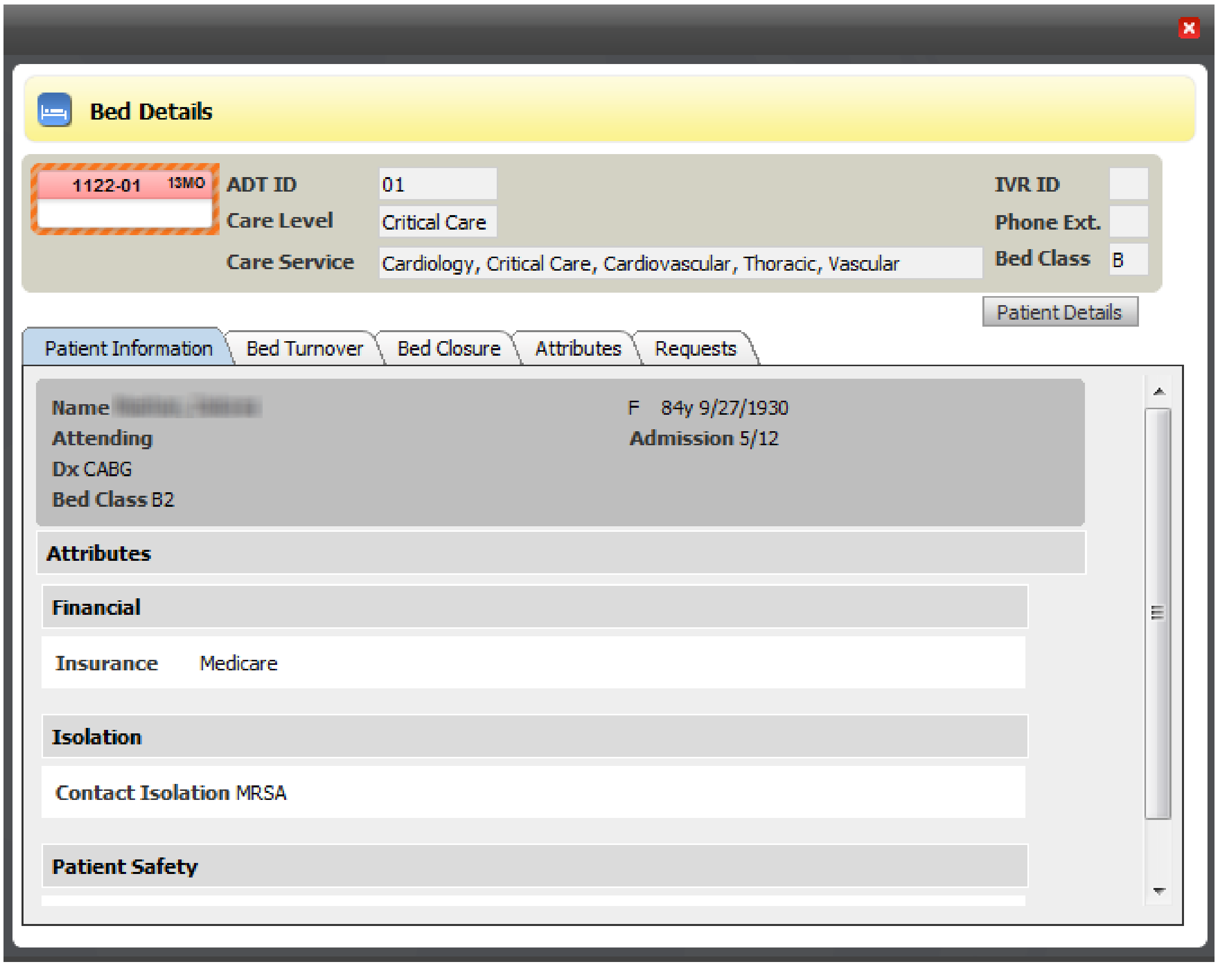
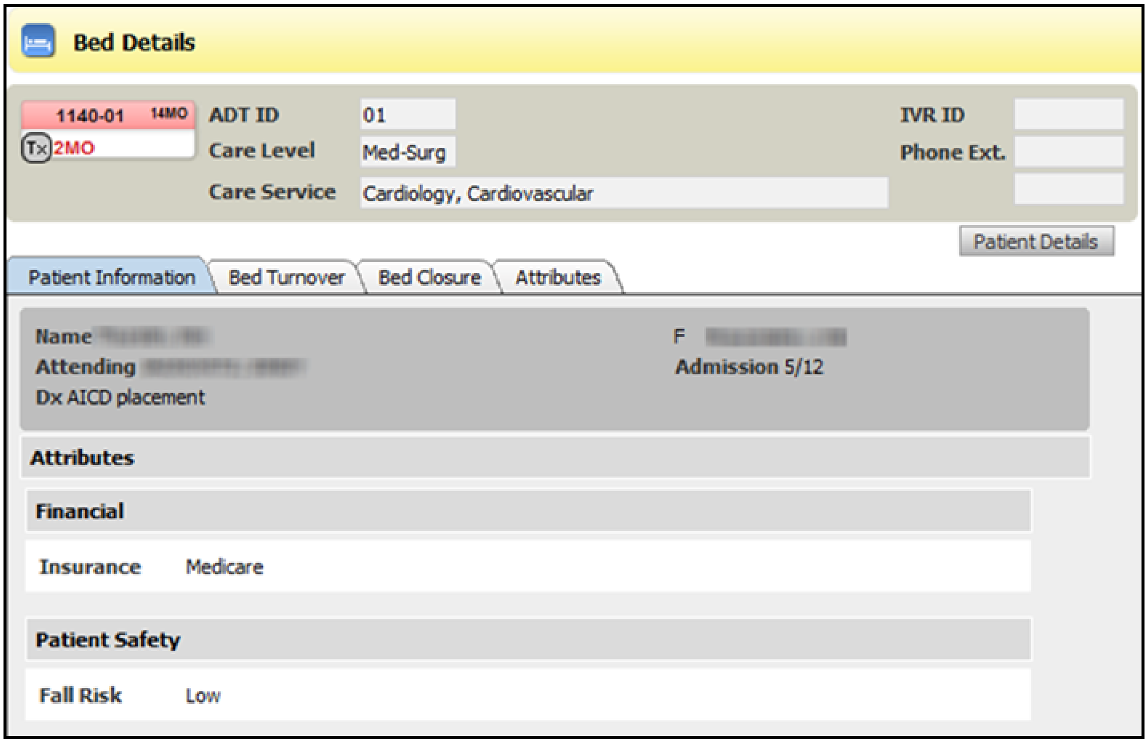


Figure 37: Bed Details Window



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 AD 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.

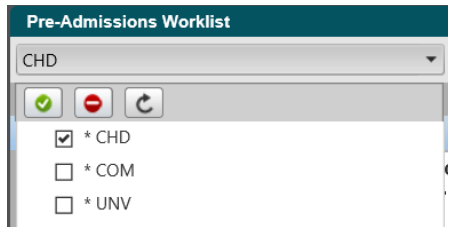
Select organizations

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.

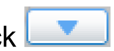
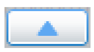
1. Click ⌄ (selection arrow) on **Pre-Admissions Worklist**.

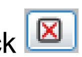
Pre-Admissions Worklist displays the organizations you can access.

Figure 38: Pre-Admissions Worklist



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 AD (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: Pending Admission Window

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.

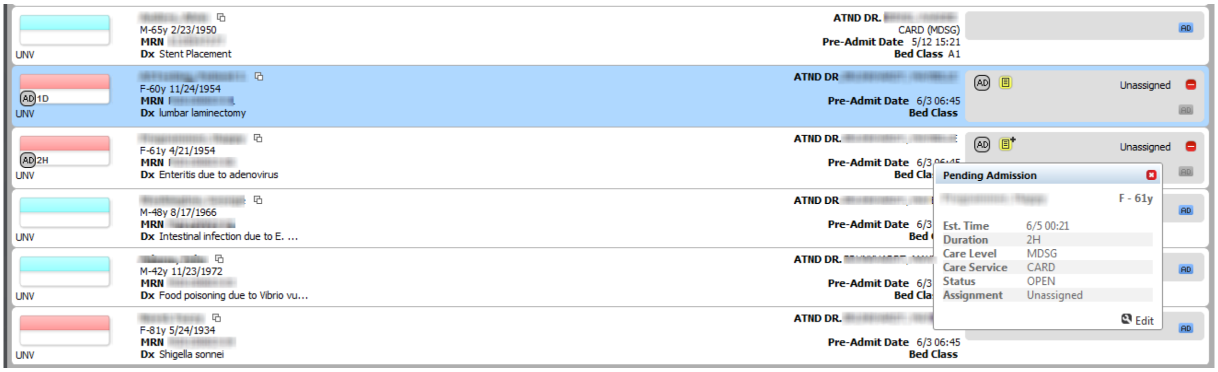
Edit a Pending Admission request

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

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

Pending Admission displays a few request details.

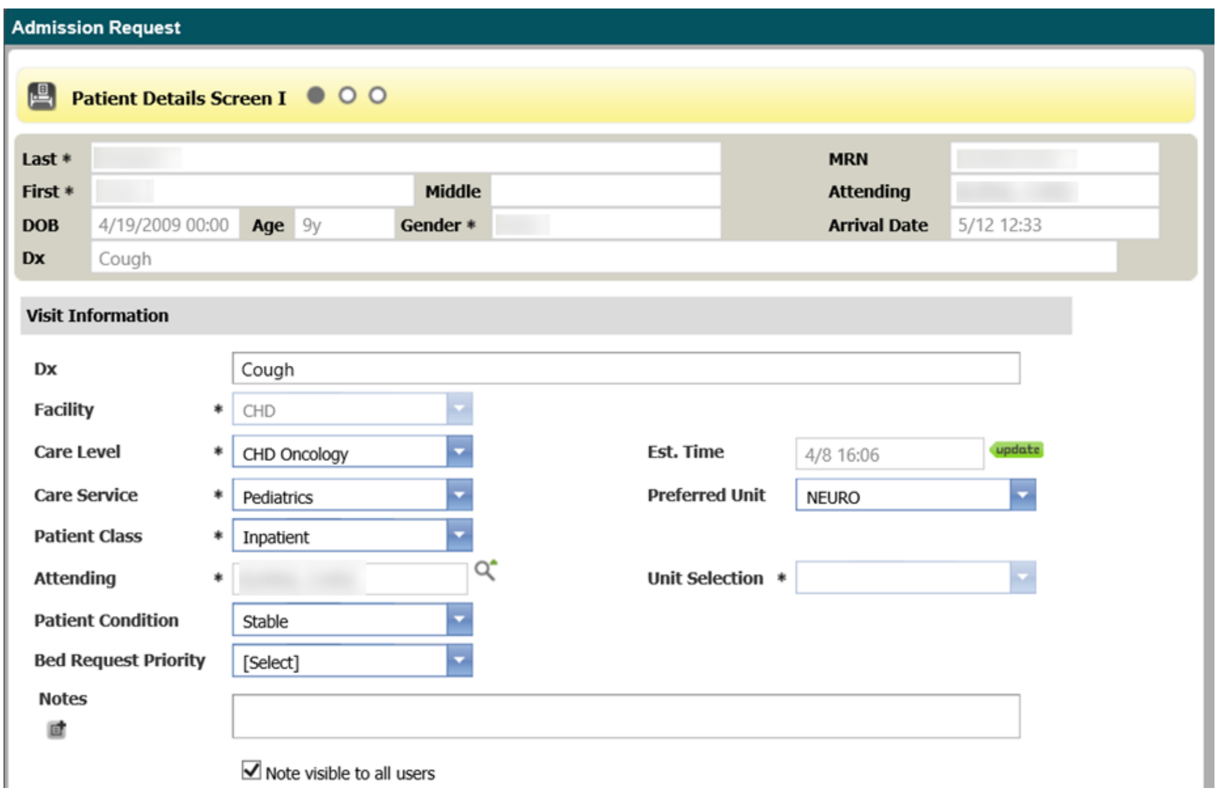
Figure 40: Pending Admission Window



2. Click Edit.

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

Figure 41: Admission Request: Patient Details Screen I



3. Do one of the following:

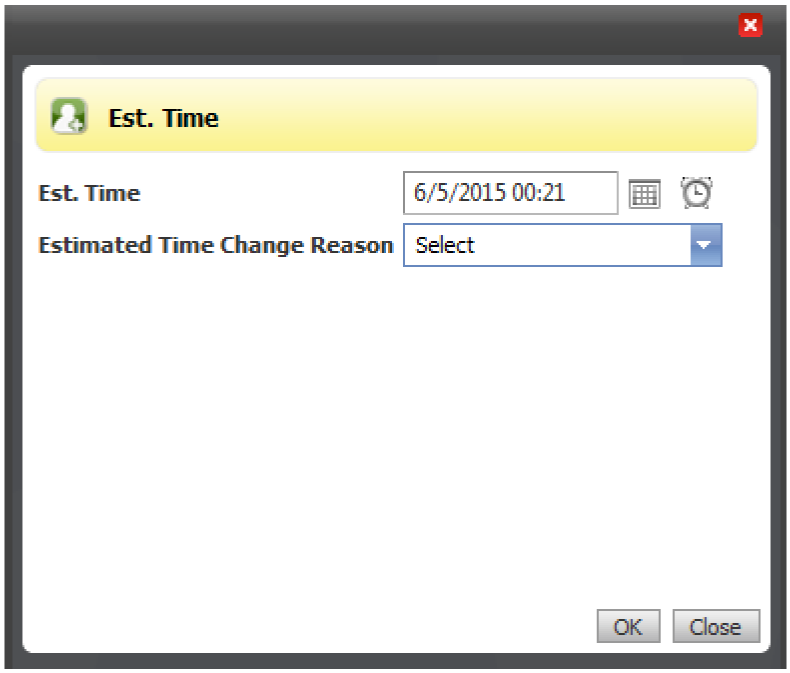
   > If you want to update the date or time in **Est. Time**, go to Step 4.

> If you want to update any other boxes, go to Step 6.

4. To update the date or time in **Est. Time**, click .

   Est. Time is displayed.

Figure 42: Est. Time Window



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:

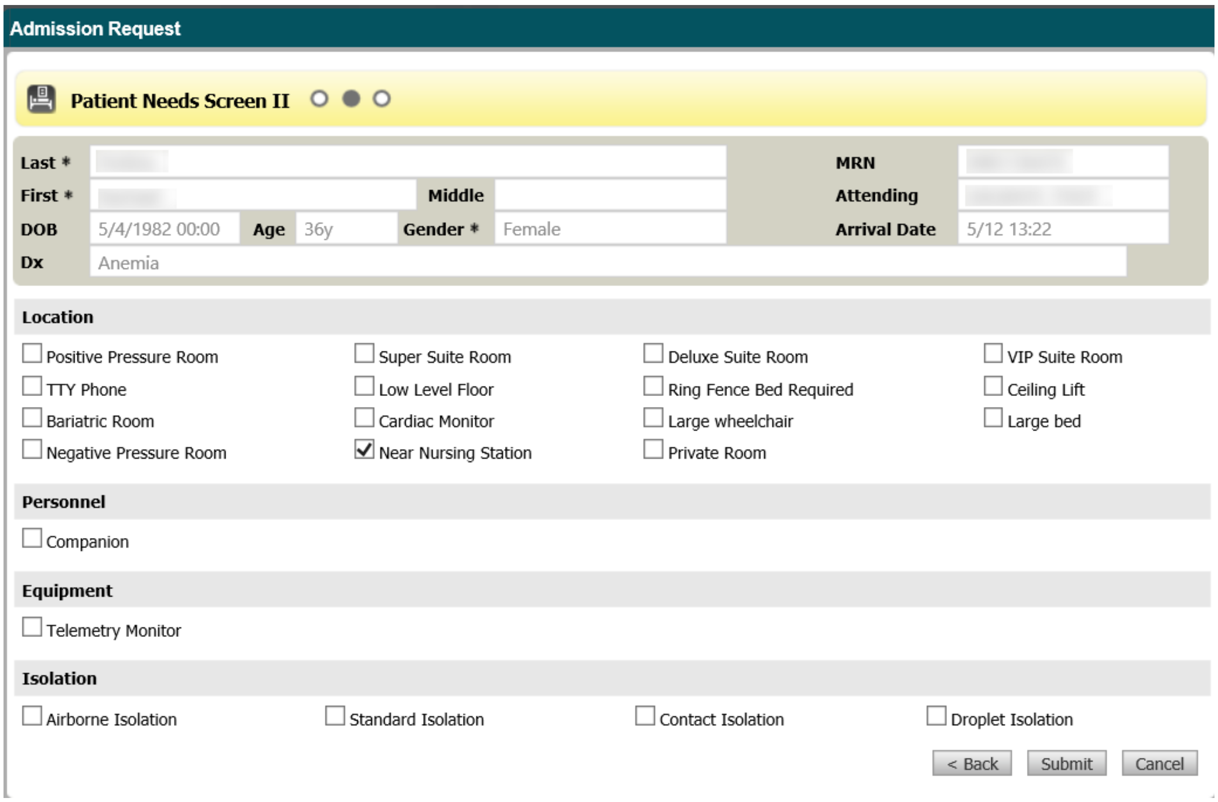
   > If you are finished entering changes and want to submit the pending admission request to the same facility, scroll down and click **Submit**.

   Patient Details Screen I closes. **Pre-Admissions Worklist** continues to display the patient row with (pending admission icon) in the patient tile and in the **Requests** column.

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.

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**.

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.

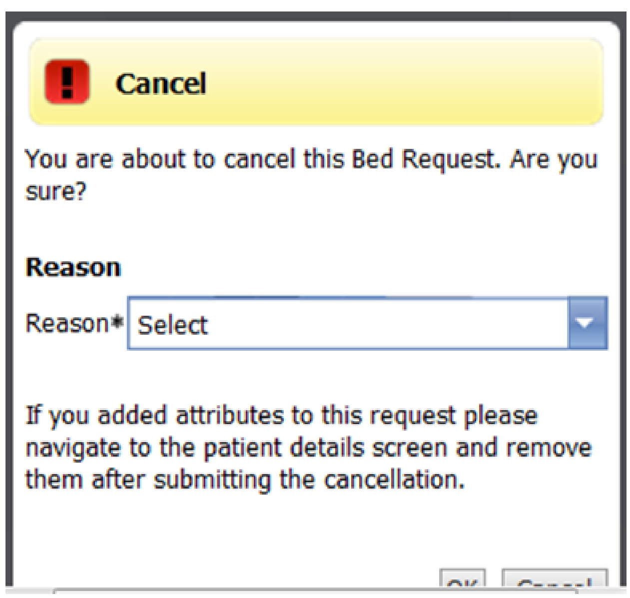
Cancel a pending admission request

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

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

   The reason displays in **Reason**.

3. Click OK to confirm the cancellation.

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

Chapter 7

Bed Management Worklist

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**.

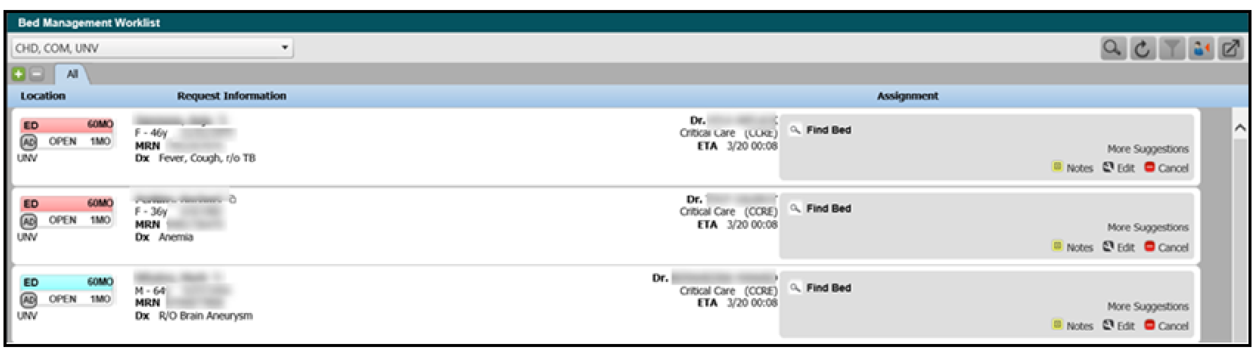
Access Bed Management Worklist

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.

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.
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.
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.

Button/Icon	Purpose
Reject	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:

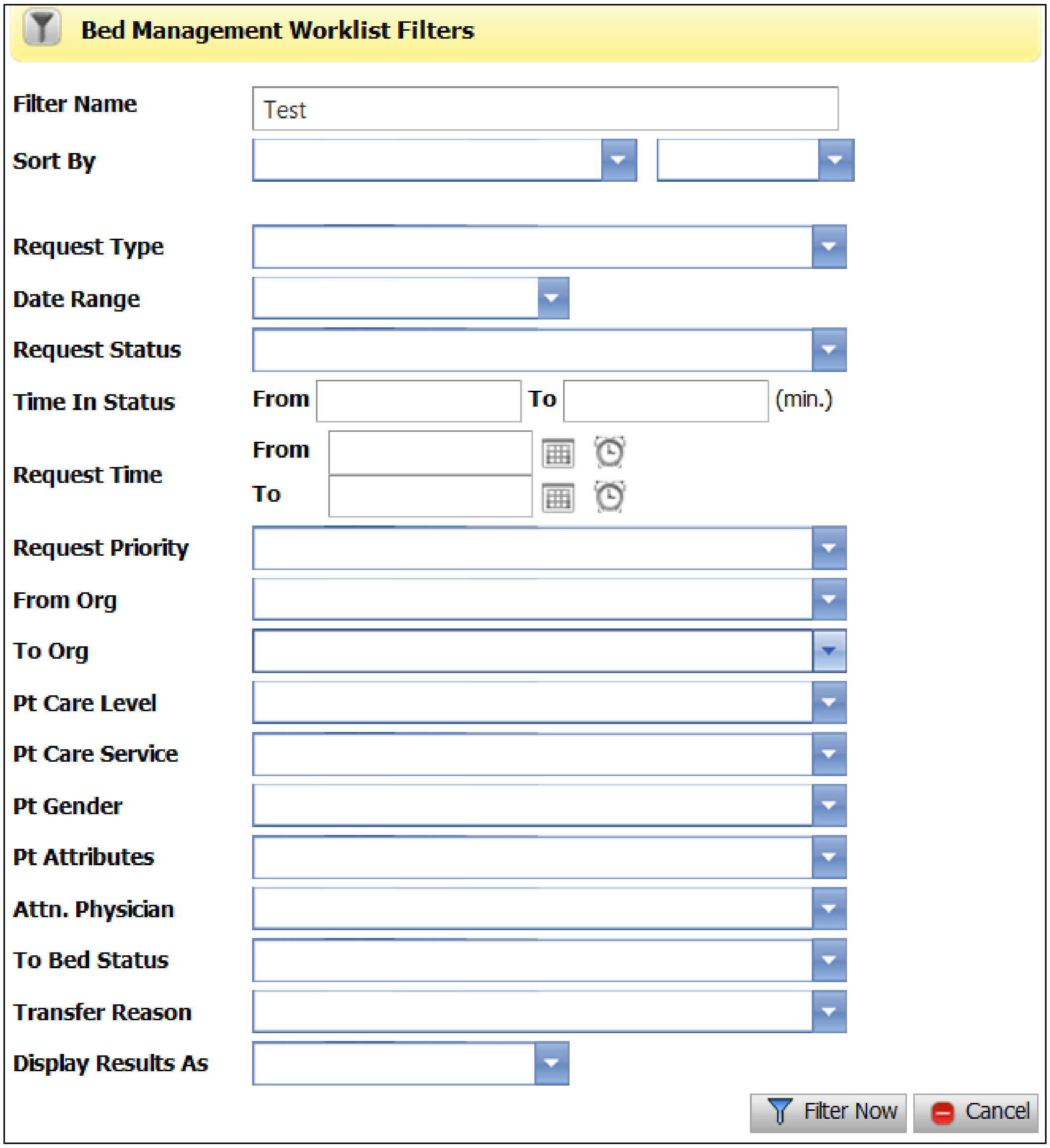
- HOLD = Hold on Bed
- OPEN = Open Request Without Any Placement
- R2BD = Reserved to Bed
- R2UN = Reserved to Unit
- RBWC = Reserved to Bed, Waiting for Confirmation
- RUWA = Reserved to Unit, Waiting for Acknowledgment.

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.

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.

Figure 47: Bed Management Worklist

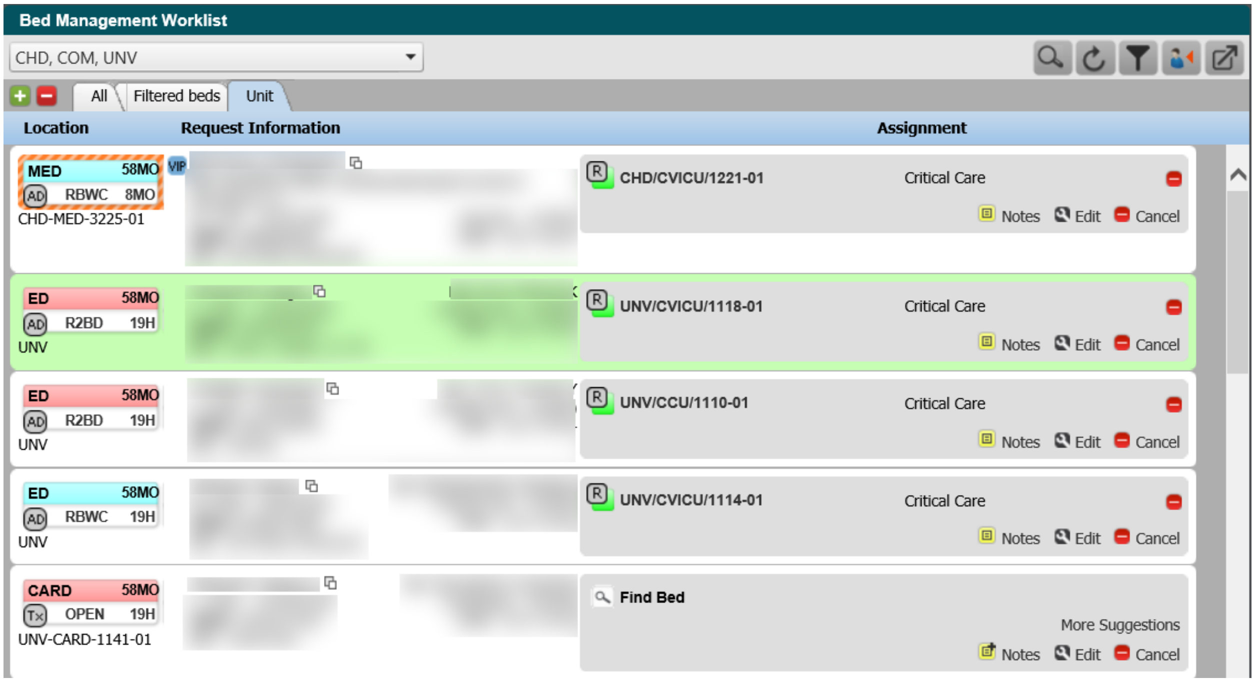
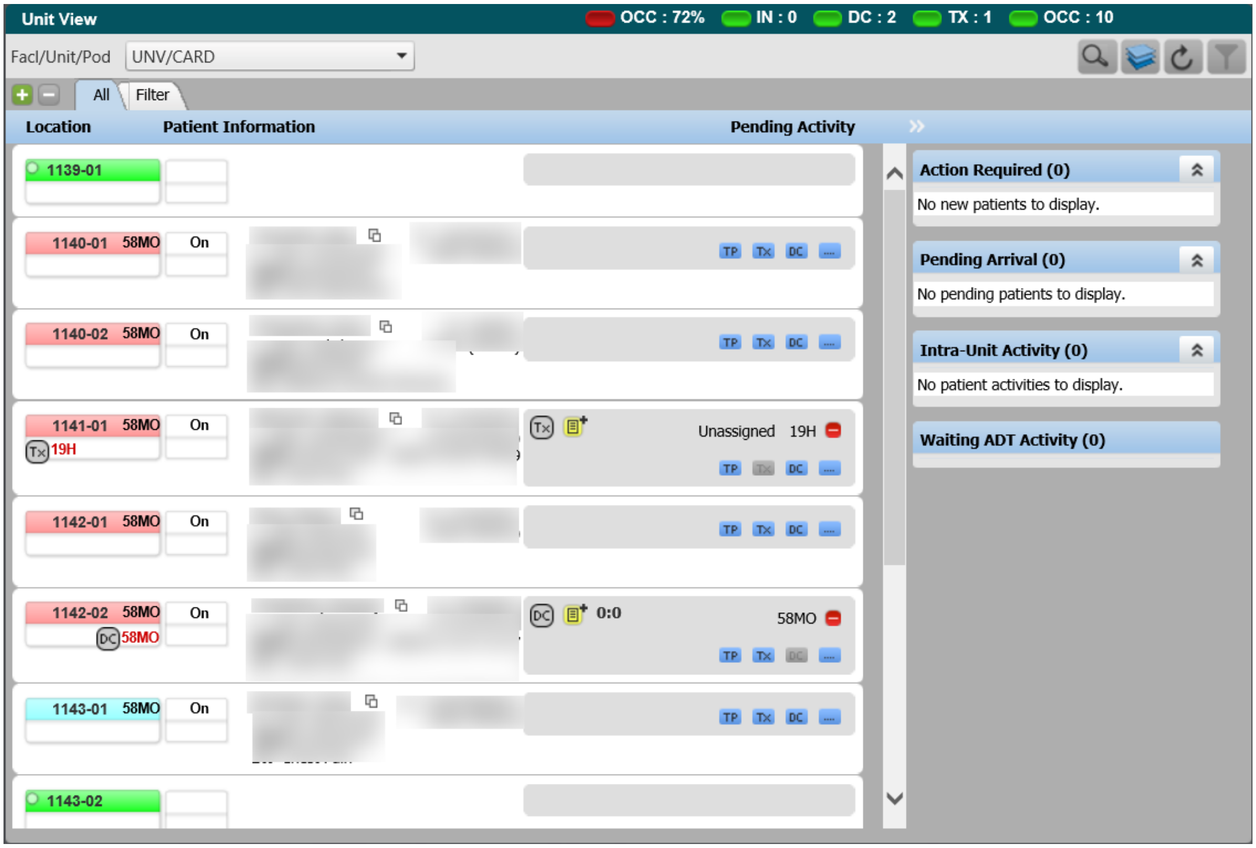


Figure 48: Unit View



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

Use IME matches to reserve or hold a bed

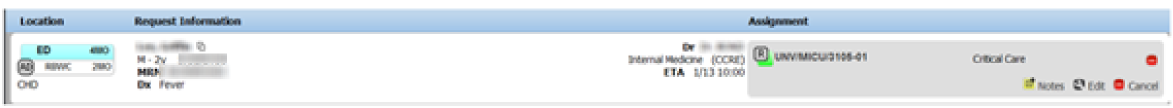
The Intelligent Matching Engine (IME) process automatically starts search and match terms to score the beds independently and find available beds that match the patient's needs. The IME process also calculates the percentage of needs matched by the bed and whether the bed meets the match threshold.

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.

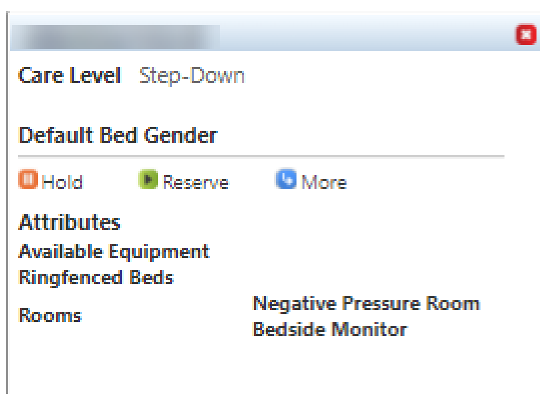
   The bed IDs for any bed matches display in the **Assignment** column in the specific patient's row.

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:

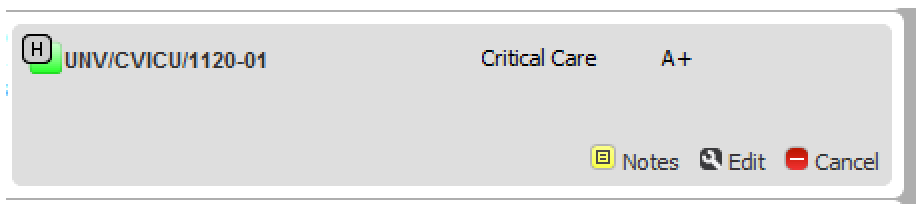
   a. To place a reservation on this bed, click Reserve .

      The reservation icon 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 Hold. Clicking 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 H 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



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

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 on the right of the bed reservation. (Do not click Cancel that displays following it, which cancels the bed request.)

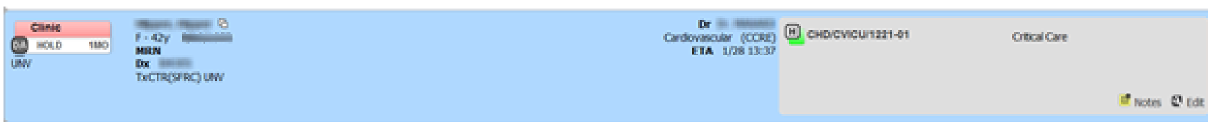
> **Note:** An open bed or unit reservation is automatically canceled when the Care Level, Care Service or Attending Physician are updated. The reservation icon is removed from the previously reserved bed tile in the Unit View and the Pending Activity area of the **Bed Management Worklist** and the bed 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 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.

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 53: Room Options

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 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.

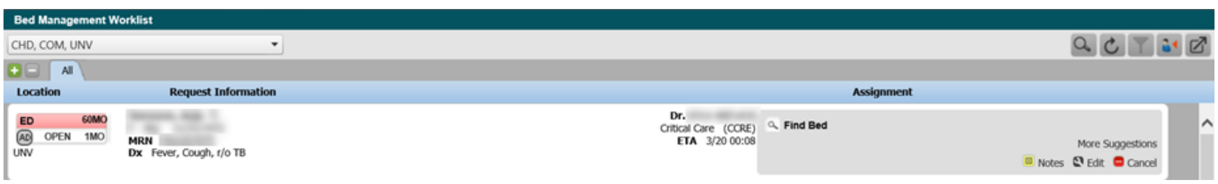
Usually, the Intelligent Matching Engine process automatically displays bed matches for a patient. If no matches for a patient are found, **Find Bed** displays in the **Assignment** column for the patient. Using a manual process, you can enter or change search criteria to find bed matches and reserve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

   is displayed in the **Assignment** column for the specific patient's row.

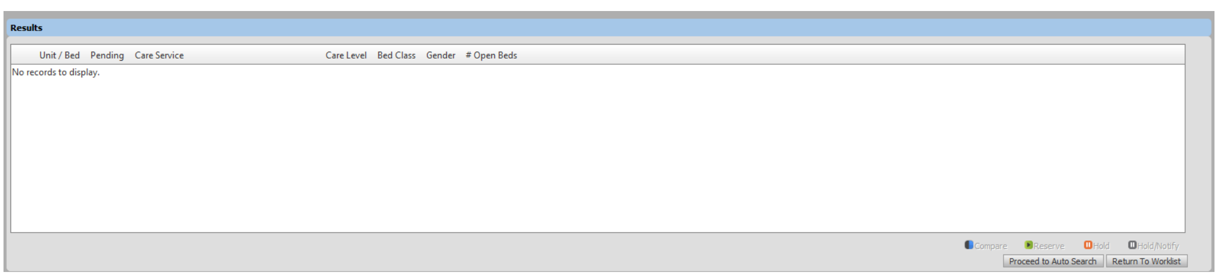
   Figure 54: Find Bed

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

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.

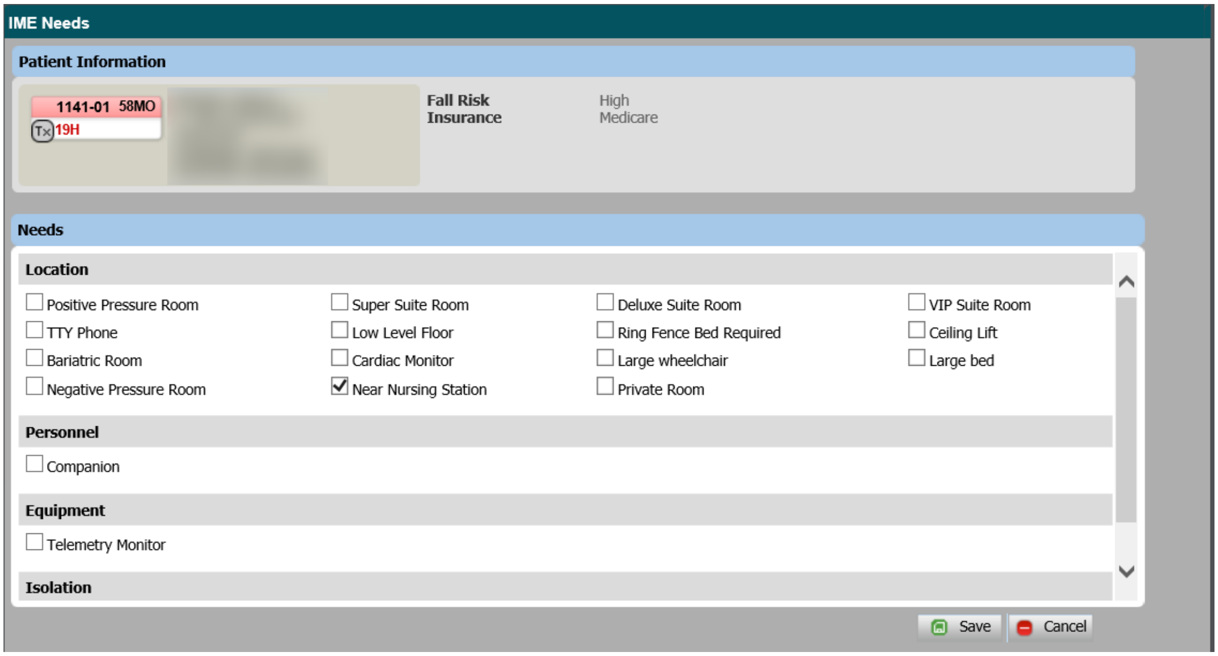
4. In the **Filters** section, enter changes in the applicable boxes, which are explained in the following table. All boxes are optional. Removing options broadens the search results, displaying more beds. Conversely, selecting more options narrows the search results, displaying fewer beds.

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 Edit Needs.

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 Save.

   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.

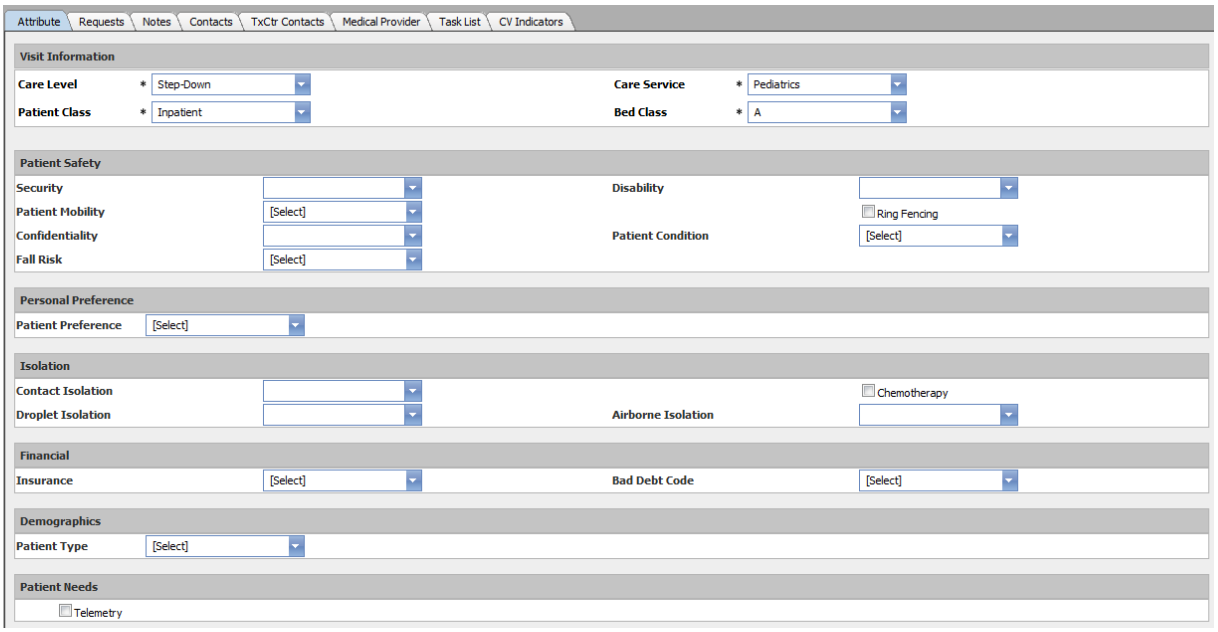
10. Click Patient Details.

    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.

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.

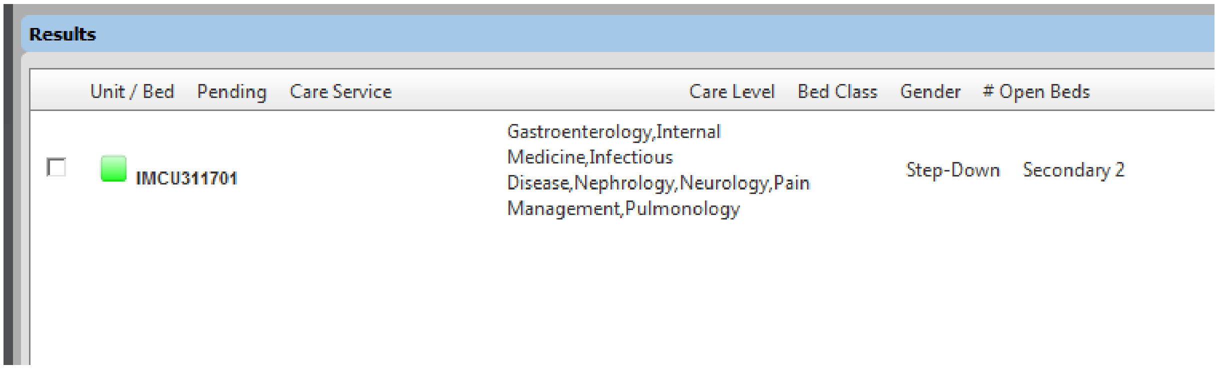
12. Click .

    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



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 .

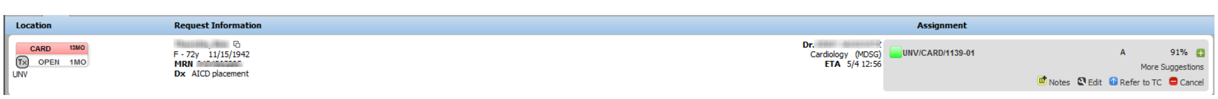
    Manual Search closes and the bed reservation is completed. The patient tile for the patient displays **R2BD** (Reserved to Bed) or **RBWC** (Reserved to Bed, Waiting for Confirmation).

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**.

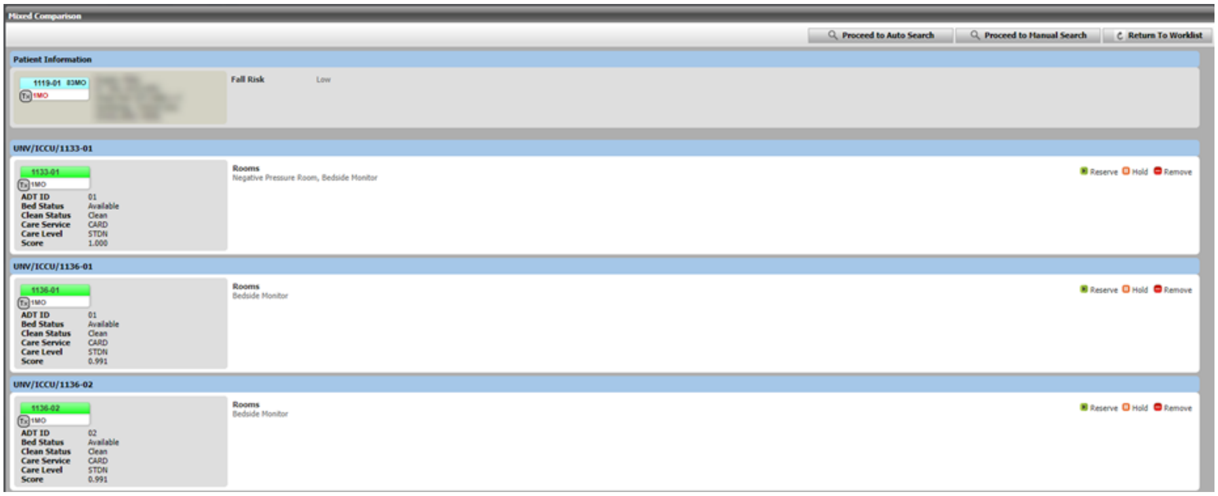
Figure 59: Patient Tile on Bed Management Worklist



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 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



5. On **Mixed Comparison** do one of the following:

> To remove a bed from the comparison, click Remove.

> To reserve a bed, click Reserve .

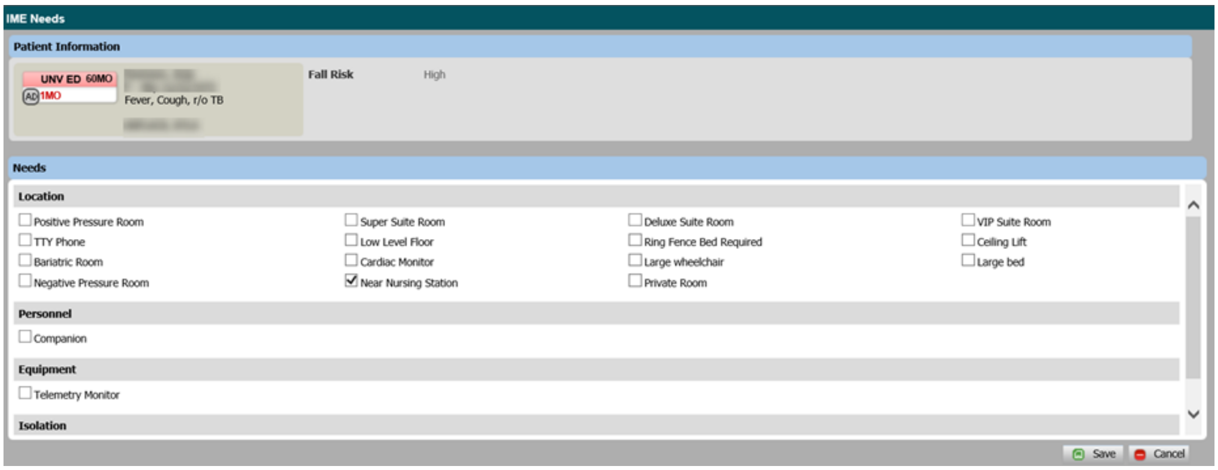
> To hold a bed, click Hold .

> To return to the**Bed Management Worklist**, click Return 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 Edit Needs. Make the updates on **IME Needs**, and then click Save.

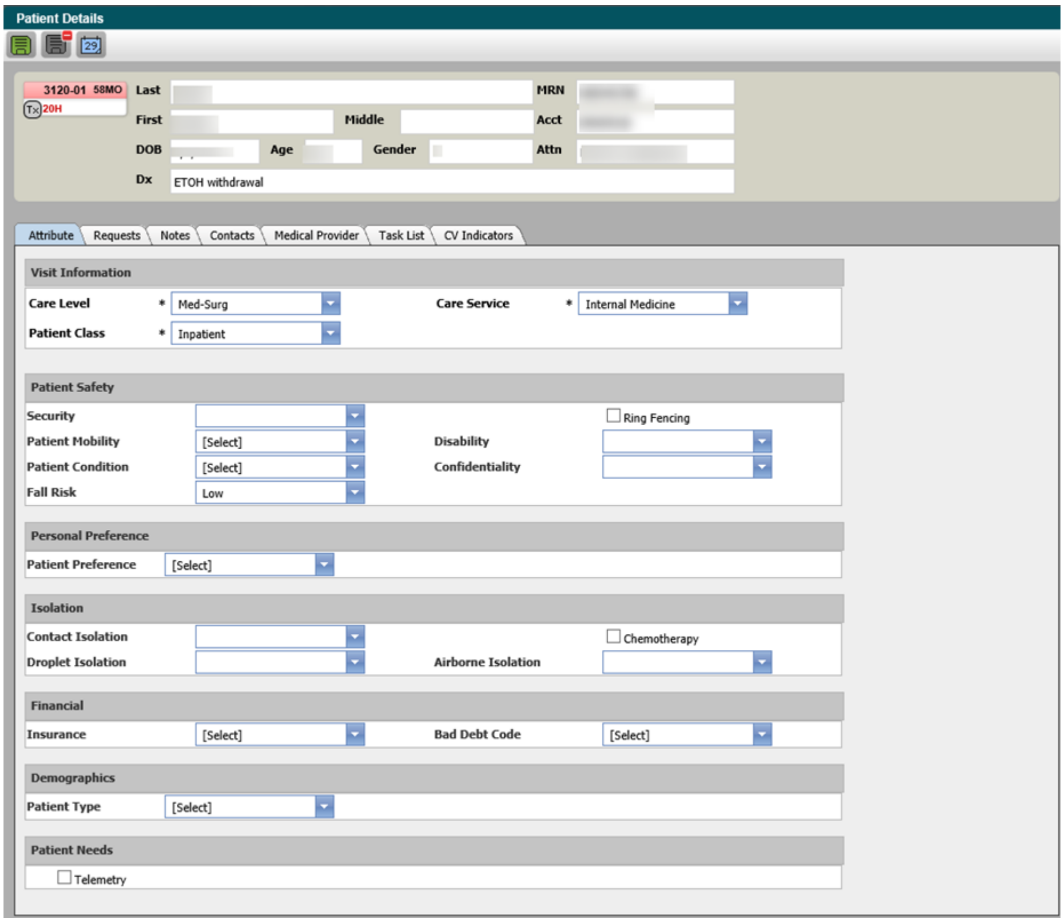
Figure 61: IME Needs



7. To edit the patient's details, click Patient Details. On **Patient Details** make the applicable changes and then click the save icon.

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

Figure 62: Patient Details



Edit request details

To edit details of a request on **Bed Management Worklist** , click 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.

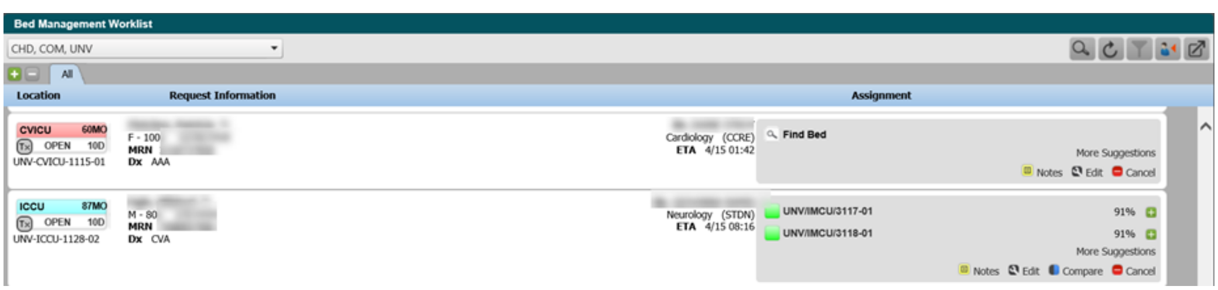
> **Note:** Reserving a unit is actually reserving a pod of that unit.

When a unit or pod is reserved for a patient, no color is displayed around the **Reservation** icon 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**.

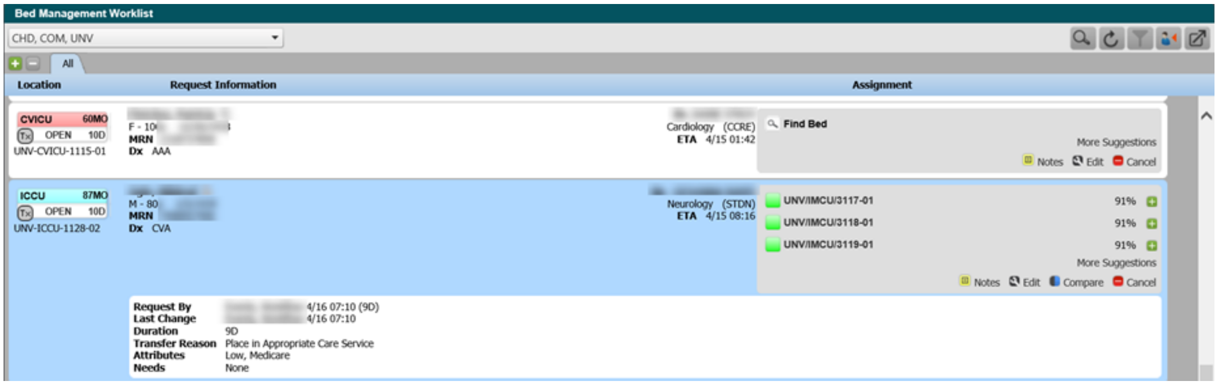
   The units matching the care service of the patient are displayed in the **Assignment** column on the specific patient's row. For example, after the IME runs, a list of the beds or units matching the care service is displayed and the percentage of match (based on 100%) is also displayed.

Figure 63: Unit Assignments



2. To display more units in the **Assignment** column, click the patient's row.

Figure 64: Patient Tile



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 .

Figure 65: Bed Management Worklist

> To find additional matching units for the patient, go to Step 4.

> To edit request details, click Edit on the patient's row.

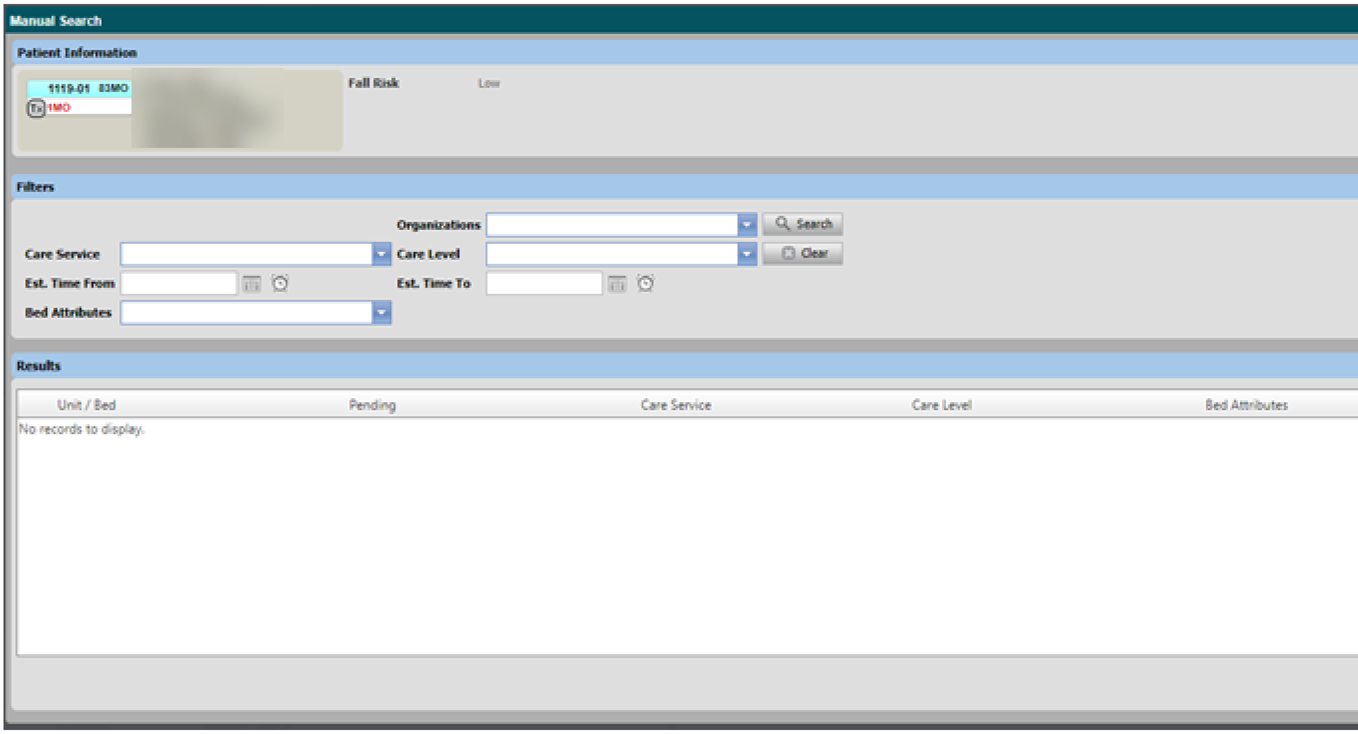
The name of the window that is displayed depends on the request (for example, **Direct Admit** for a direct admit patient). However, no matter which request you edit, you can access **Patient Details** and **Patient Needs** to edit information.

> To compare units, go to Step 9.

> To cancel the patient's Bed Request, click Cancel. Select a cancellation reason and click OK.

4. To find more matching units for the patient, click **More Suggestions** on the patient's row to open manual search.

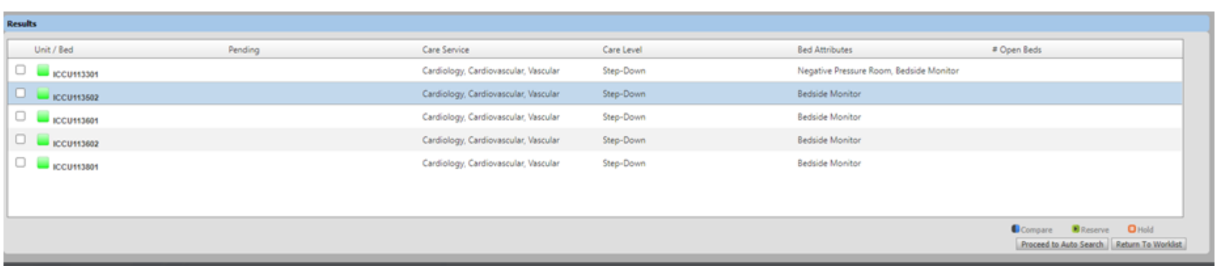
Figure 66: Manual Search



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



> **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 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 R icon in the **Assignment** column because a unit or pod is reserved, not a bed.
   - To remove a unit from **Mixed Comparison**, click Remove.
   - 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 in the **Assignment** column that has no color around it because a unit or pod is reserved, not a bed.

Figure 68: Bed Management Worklist

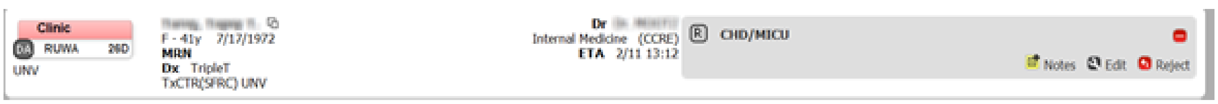
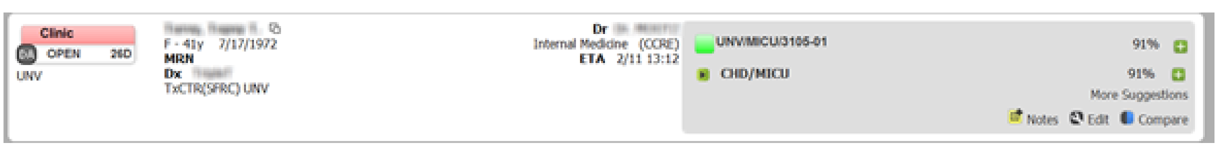


Figure 69: Cancel Reservation

2. Click the **Cancel Reserve** button on the far right of the **Reservation** icon in the **Assignment** column.

   The unit or pod reservation is canceled. The patient's unit or pod **Reservation** icon is removed from the **Assignment** column. The units matching the patient's Care Service are shown in the **Assignment** column.

Figure 70: Assignment Column



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.

Figure 71: Bed Management Worklist Report

Chapter 8

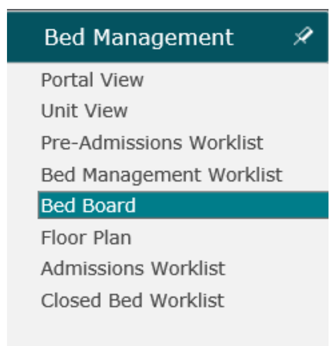
Bed Board

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

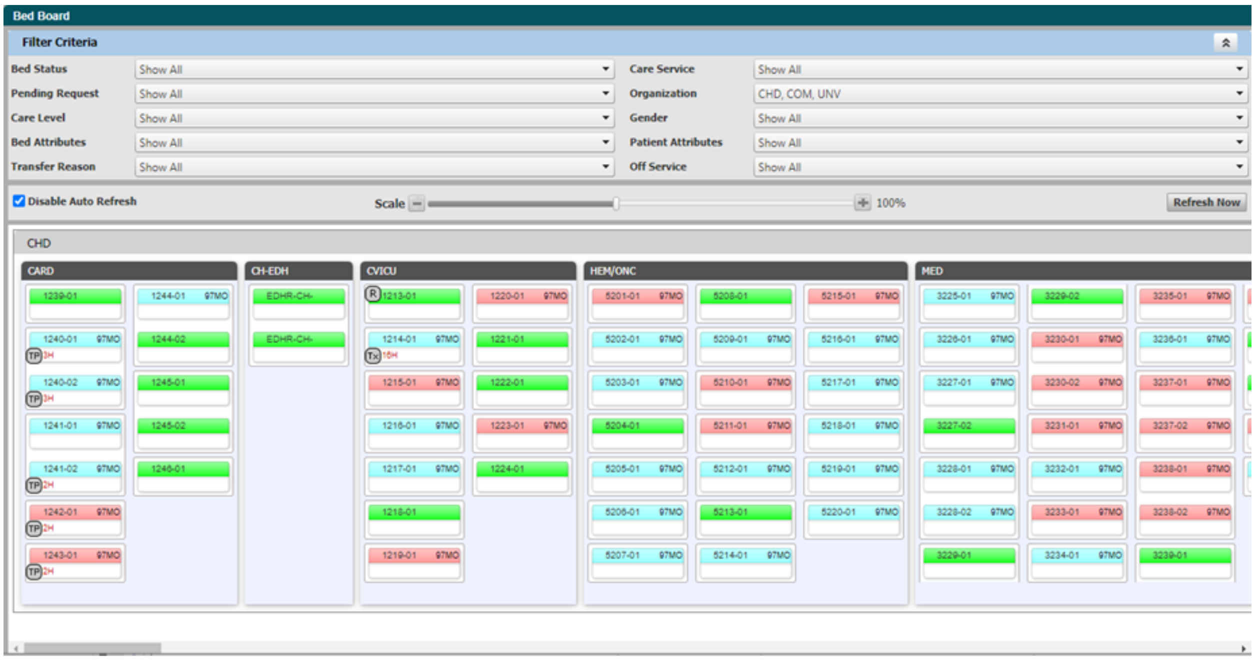


To view a list of beds, you must first enter **Filter Criteria** at the top of the page and click **Refresh Now**.

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.

Bed Board functions are described in the following sections.

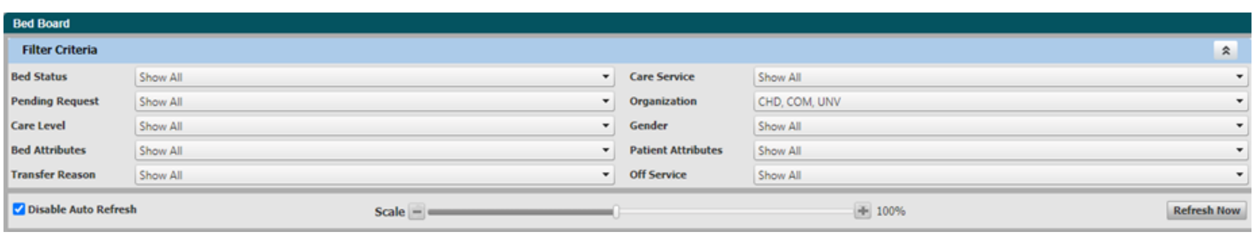
Figure 73: Bed Board



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.

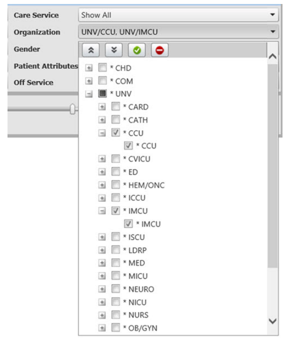
Figure 74: Bed Board Filter Criteria



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 options for each box. If you do not want to use a specific option to filter data, leave the default **Show All** option.

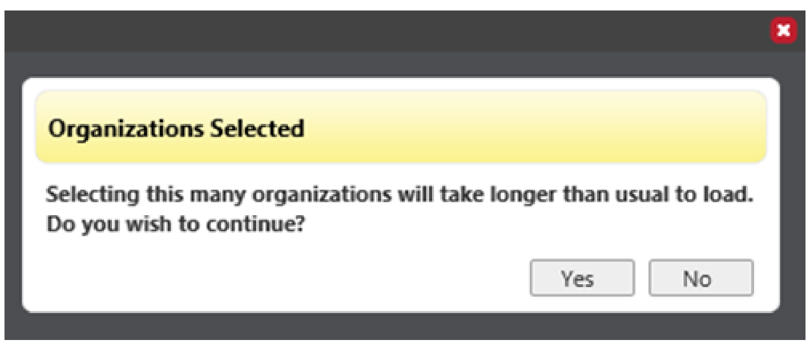
Figure 75: Organization Filter Criteria



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 

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 .

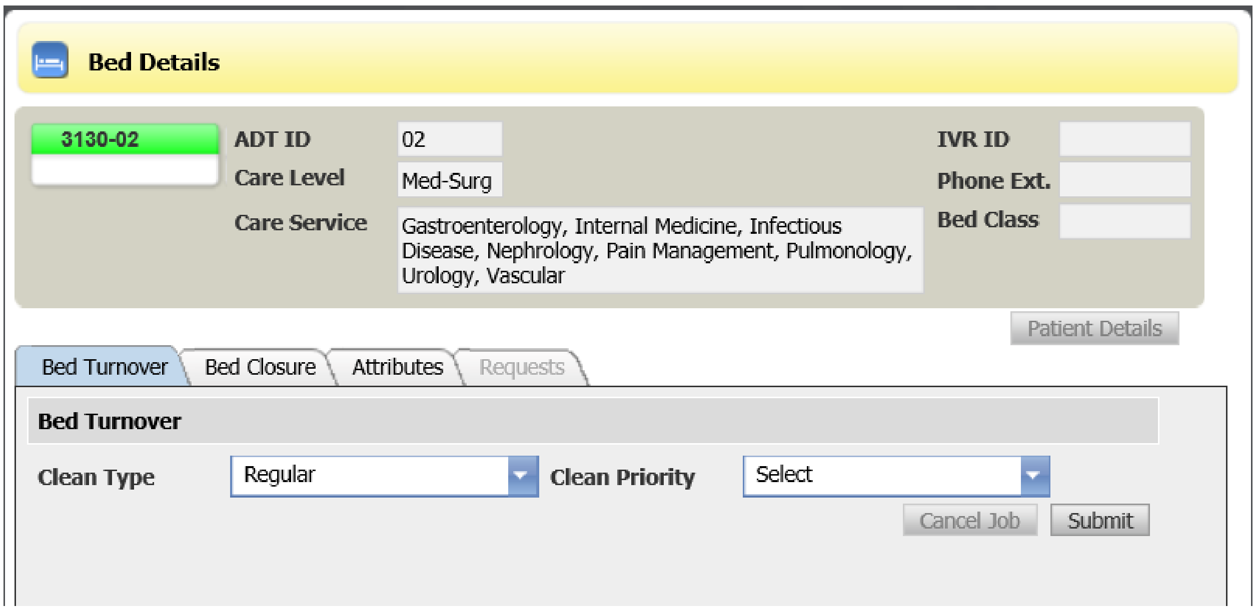
> **Note:** When the **Filter Criteria** pane is collapsed, the Bed Board refreshes and that space displays the Bed Board.

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.

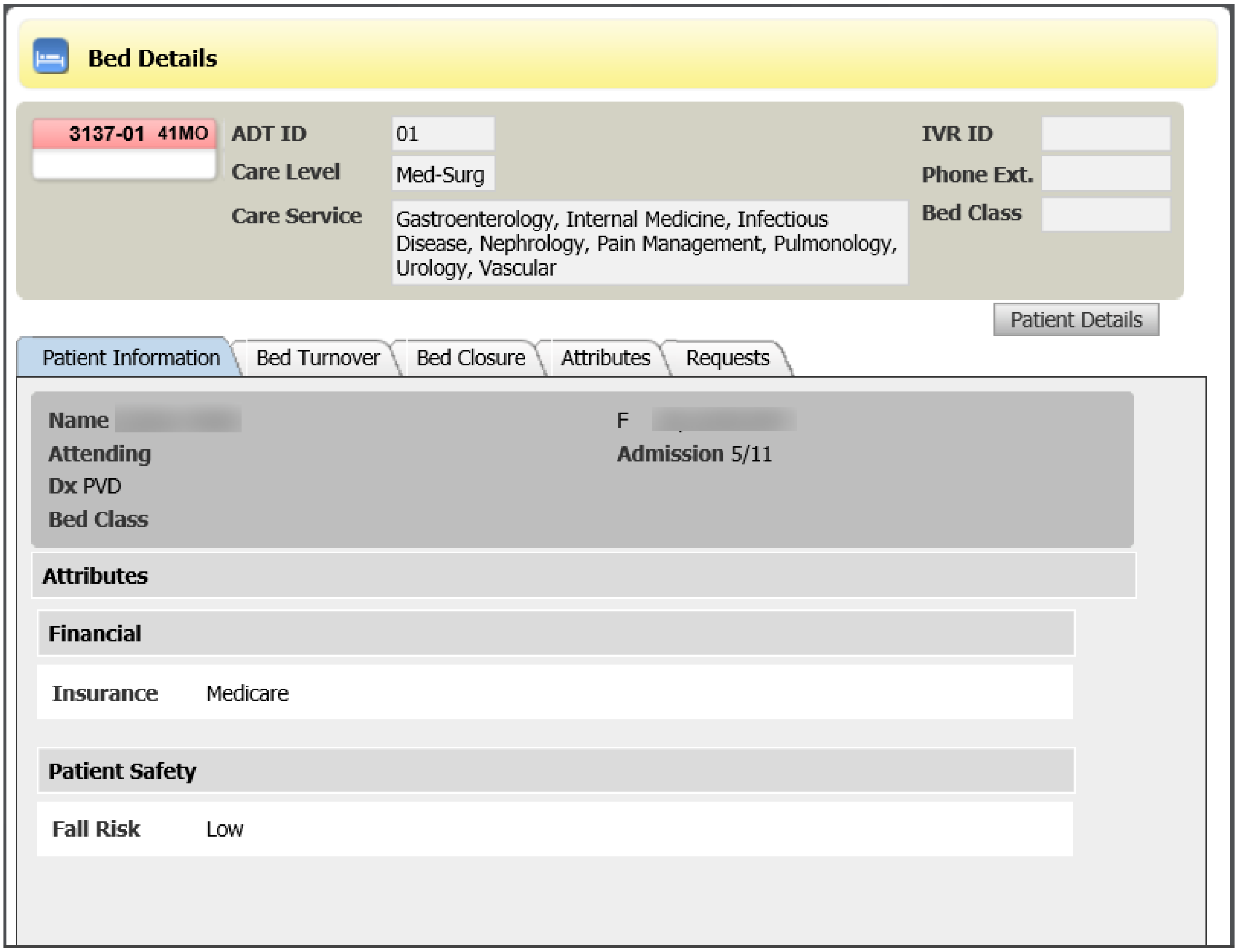
Figure 77: Unoccupied Bed: Bed Details Window



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.

> **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.

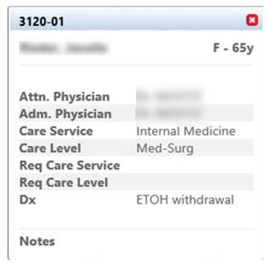
Figure 78: Occupied Bed: Bed Details Window



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*).

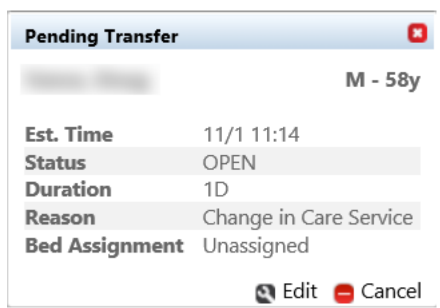
If you hover over the bed tile icon and have been granted the appropriate authorization (Bed Board Patient Summary pop–up associated to user role) item by your System Administrator, you will see a condensed window with patient information.

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



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.

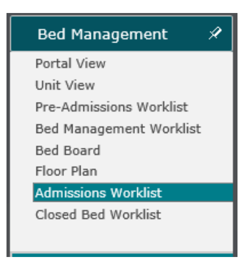
Direct Admit on the **Portal View** and **Bed Management Worklist** enables you to enter information for a Direct Admit patient in Allscripts Patient Flow™. The Direct Admit activity displays on these pages and on **Admissions Worklist**. The patient's information might also have been entered into the 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™ 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 1record 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**.

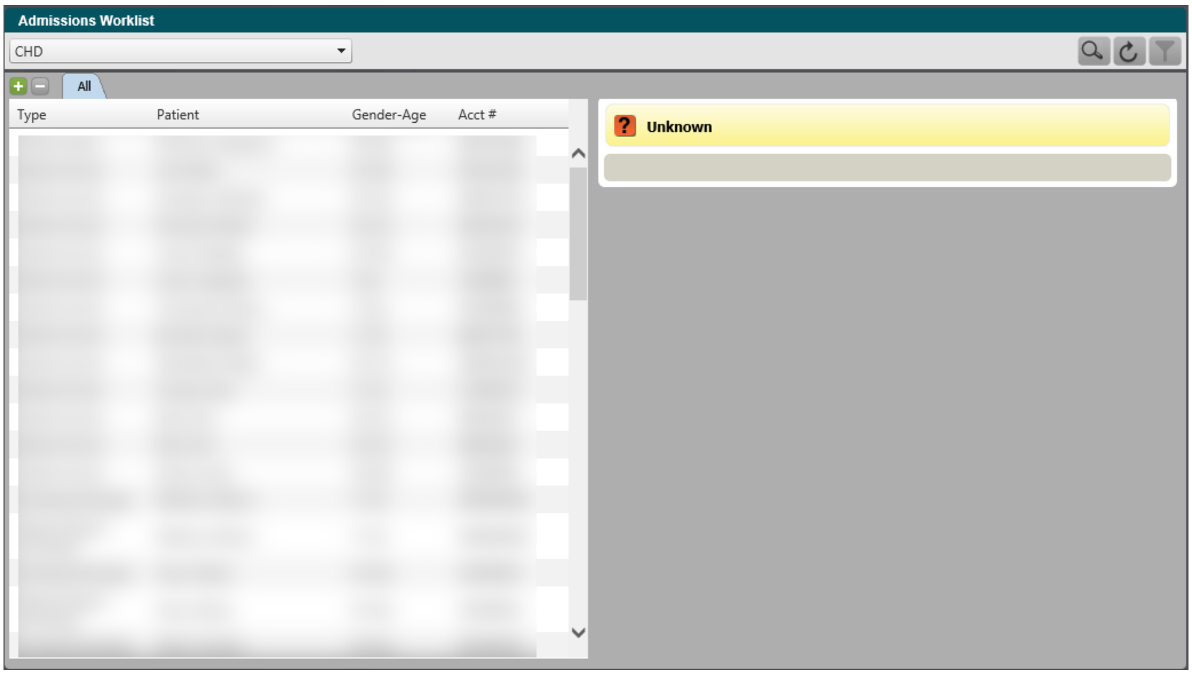
Figure 81: Bed Management Menu



Admissions Worklist is displayed.

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**.

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.

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

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

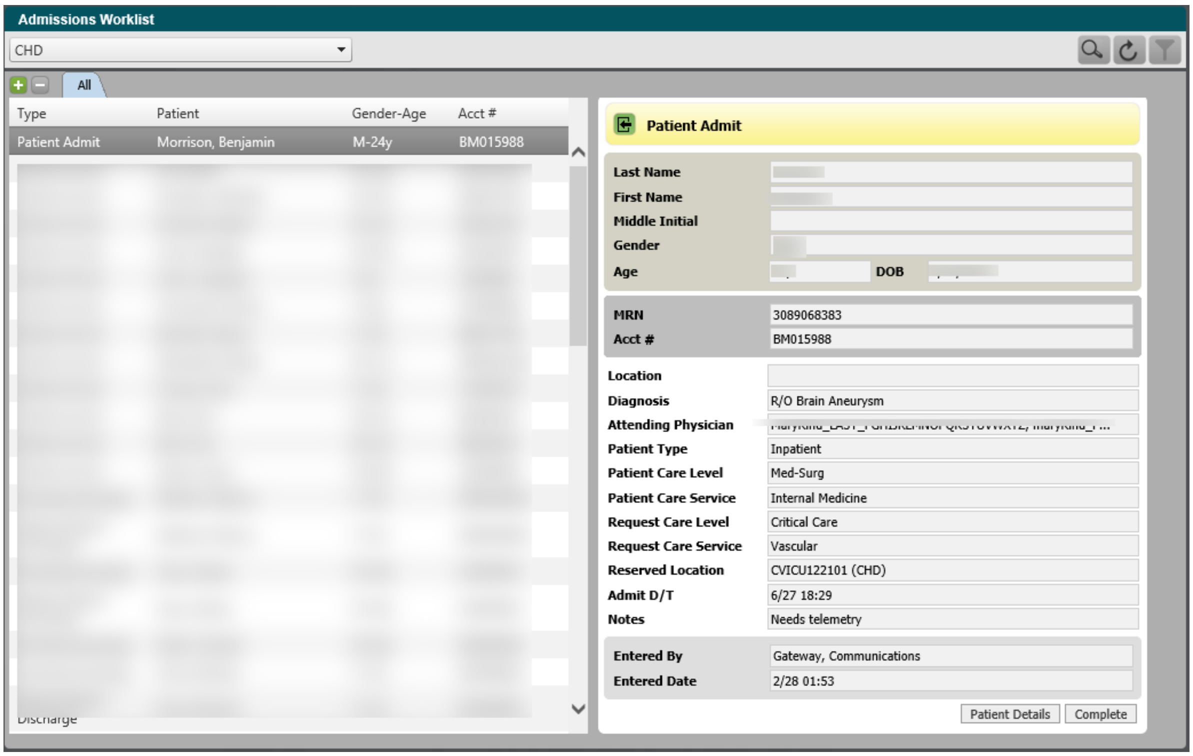
This topic describes how to update a patient's record.

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.

Some information for the patient is displayed on the right pane.

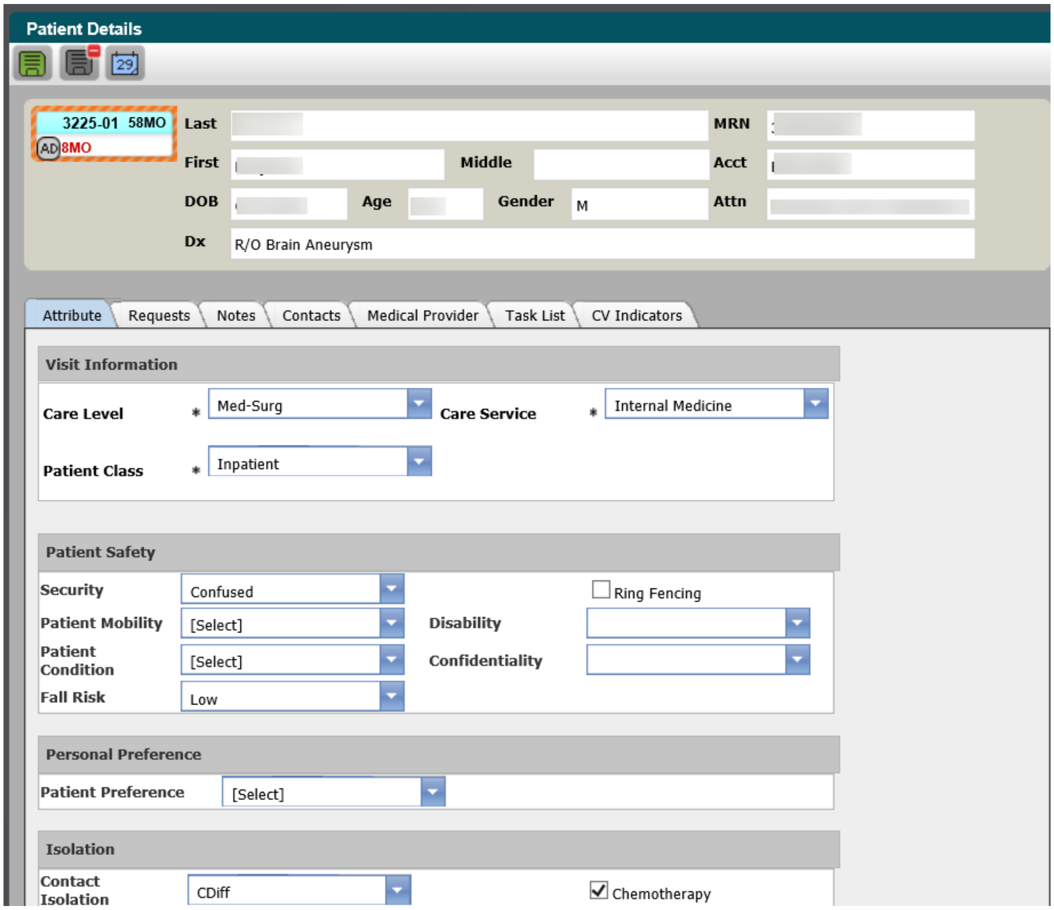
Figure 83: Patient List



2. To view more details for the patient, click Patient Details.

Patients Details displays the **Attribute** tab.

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.

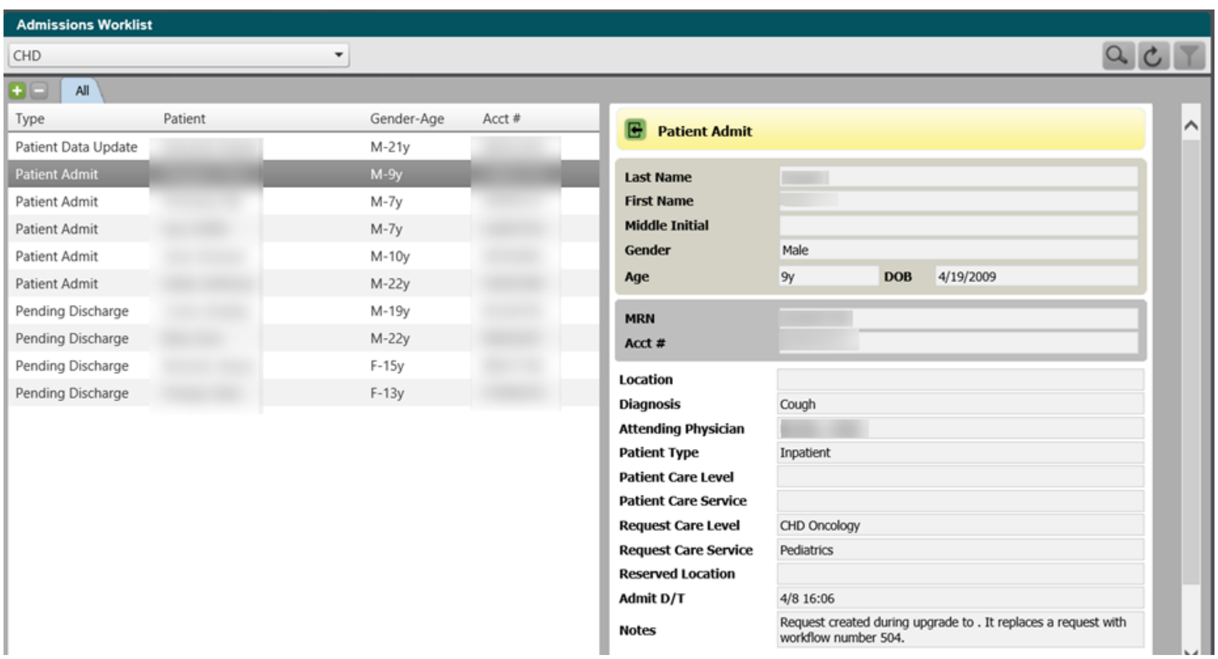
Ensure that the patients match and are the same prior to merging the patient records.

> **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.

   Figure 85: Admissions Worklist: Direct Admit Match

2. Do one of the following:

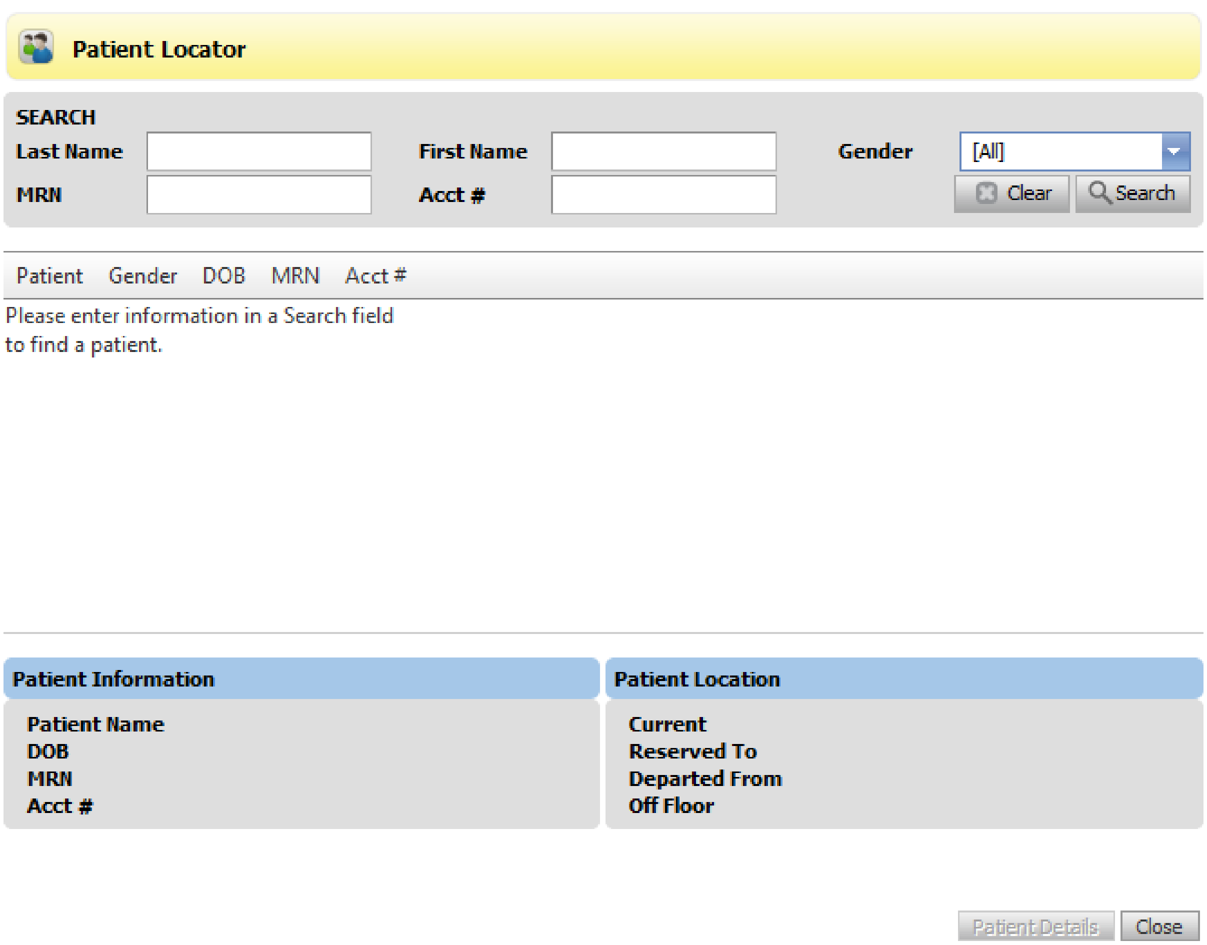
   > If the name of a matching patient displays in the **Patient** column, go to Step 8.

> 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

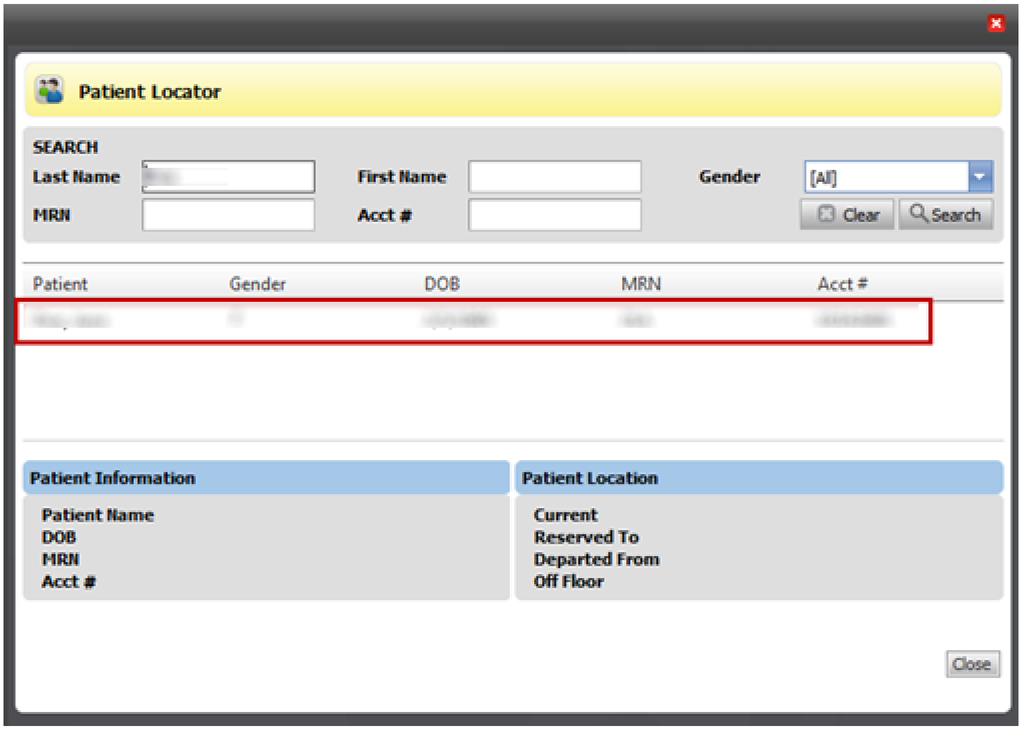


   Optionally, enter any other information in the SEARCH section to narrow the search, such as the patient's first name.

4. Click Search.

Patient Locator displays any patients that match the search criteria.

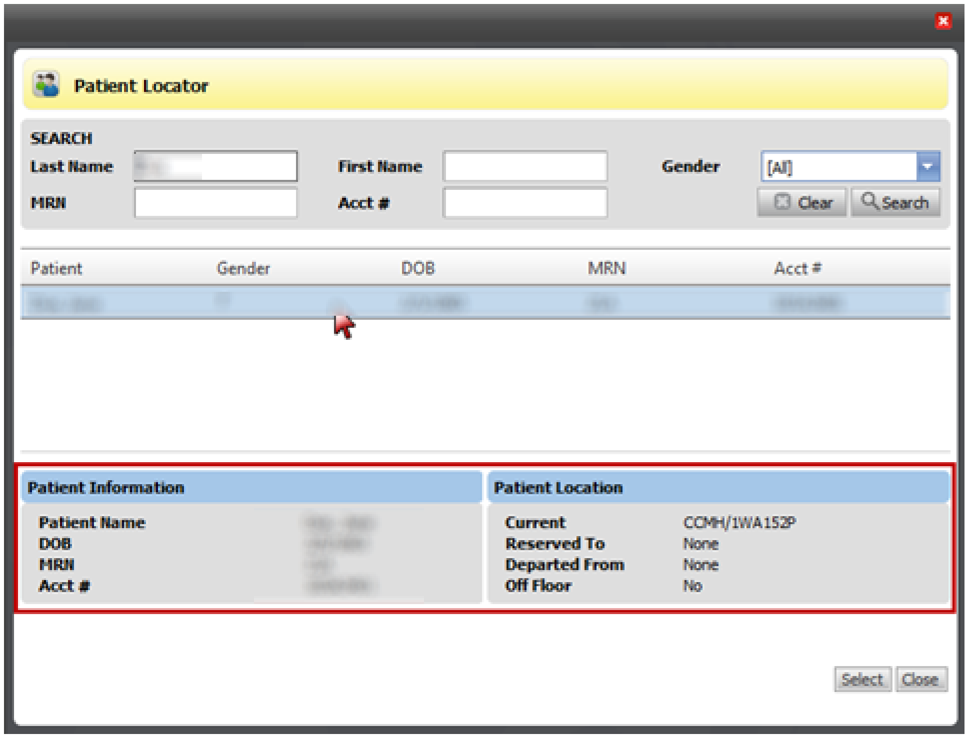
Figure 87: Patient Locator



5. Click the row with the matching patient information.

The **Patient Information** and **Patient Location** sections display information for the selected patient.

Figure 88: Patient Locator



6. Compare the information for the two patients.

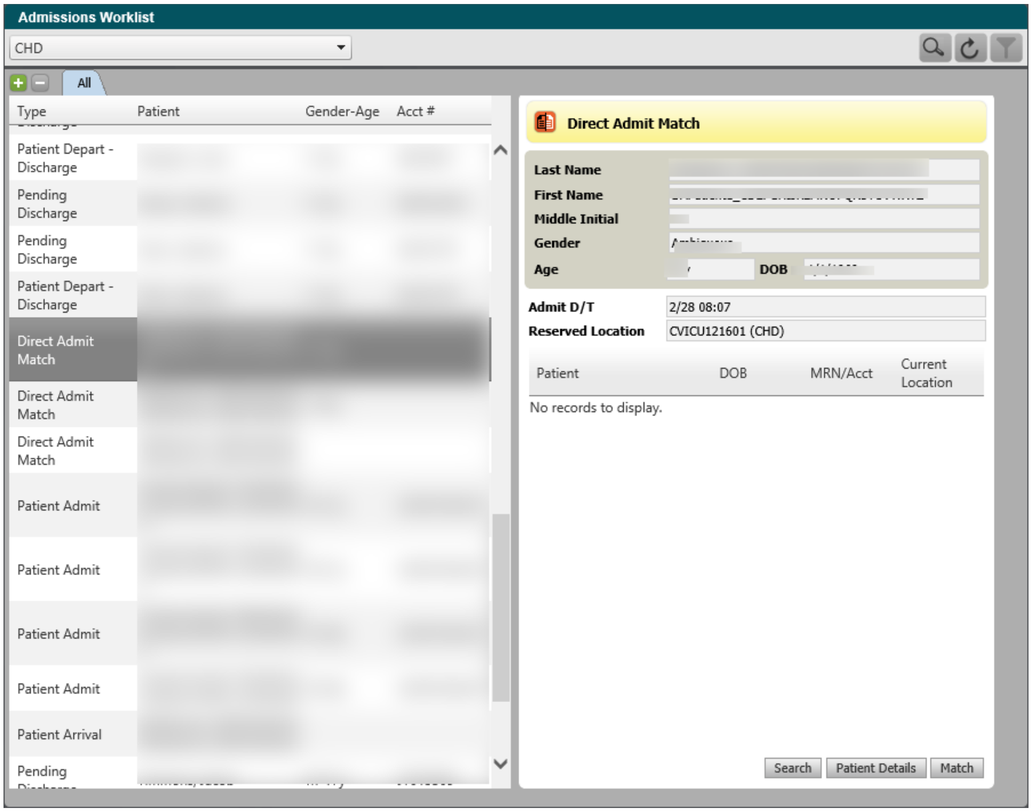
   For example, if the MRNs are the same, then the two patient records are for the same person.

7. Do 1 of the following:

   > If the patient is a match, click Select.

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.

8. 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 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.

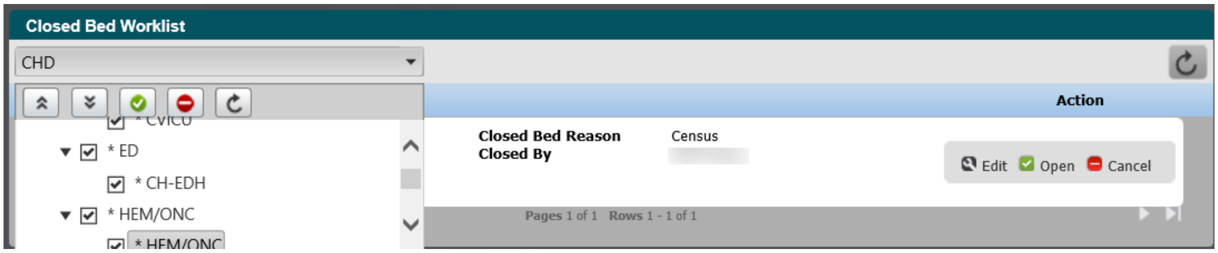
Edit bed closure information

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.

The row with the specific bed displays.

Figure 90: Row with Specific Bed



2. Click Edit.

Bed Details is displayed.

Figure 91: Bed Details

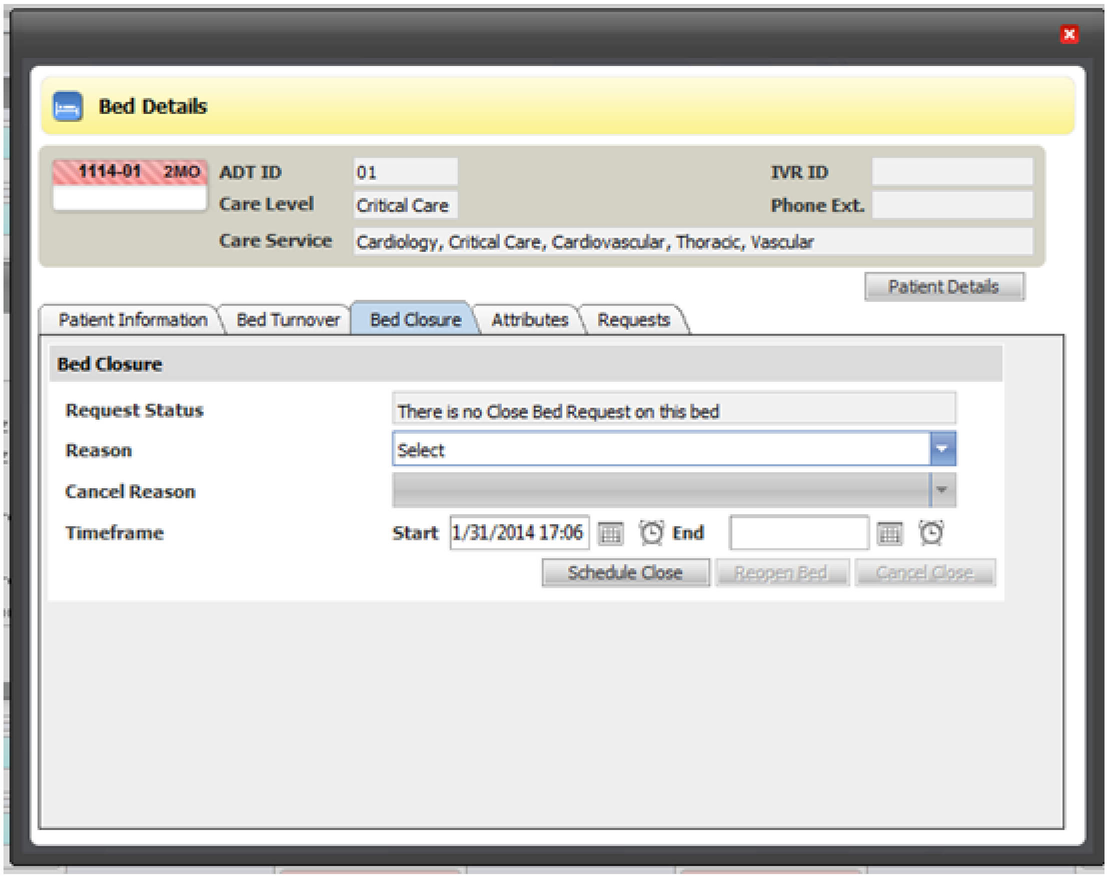
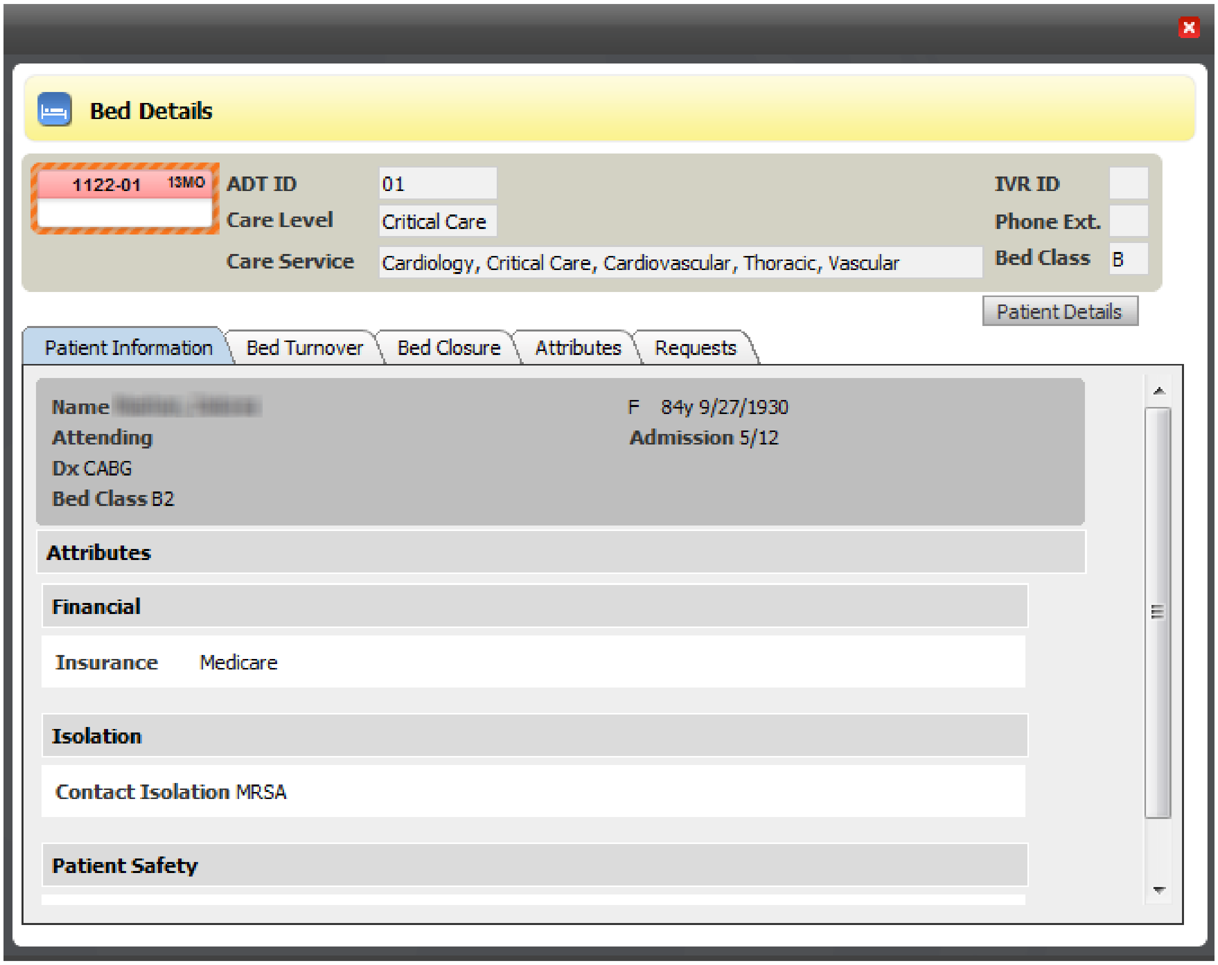


Figure 92: Bed Details



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 or 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 or 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.

Figure 93: Closed Bed Worklist

2. Click Open.

   The bed is opened and removed from **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.

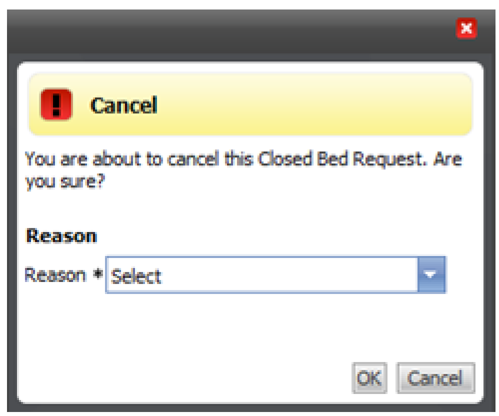
   Figure 94: Closed Bed Worklist

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 OK 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

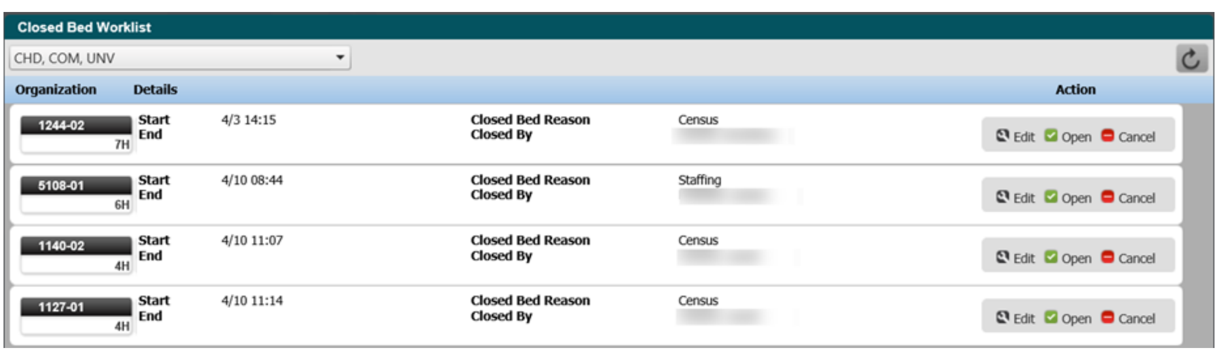
2. Click Edit .

   Bed Details is displayed. Select **Bed Turnover** to schedule the cleaning.

3. Select a cleaning type from **Clean Type**.
4. 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



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 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**.
4. In **Admin > Facility Maint > Organization**, select either **Units** or **Pods** and then select **Procedural Unit**.
5. 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.

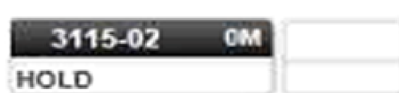
   > **Important:** In the top part of the location record, do not select **Generate Clean Request**.

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.

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.

> **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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