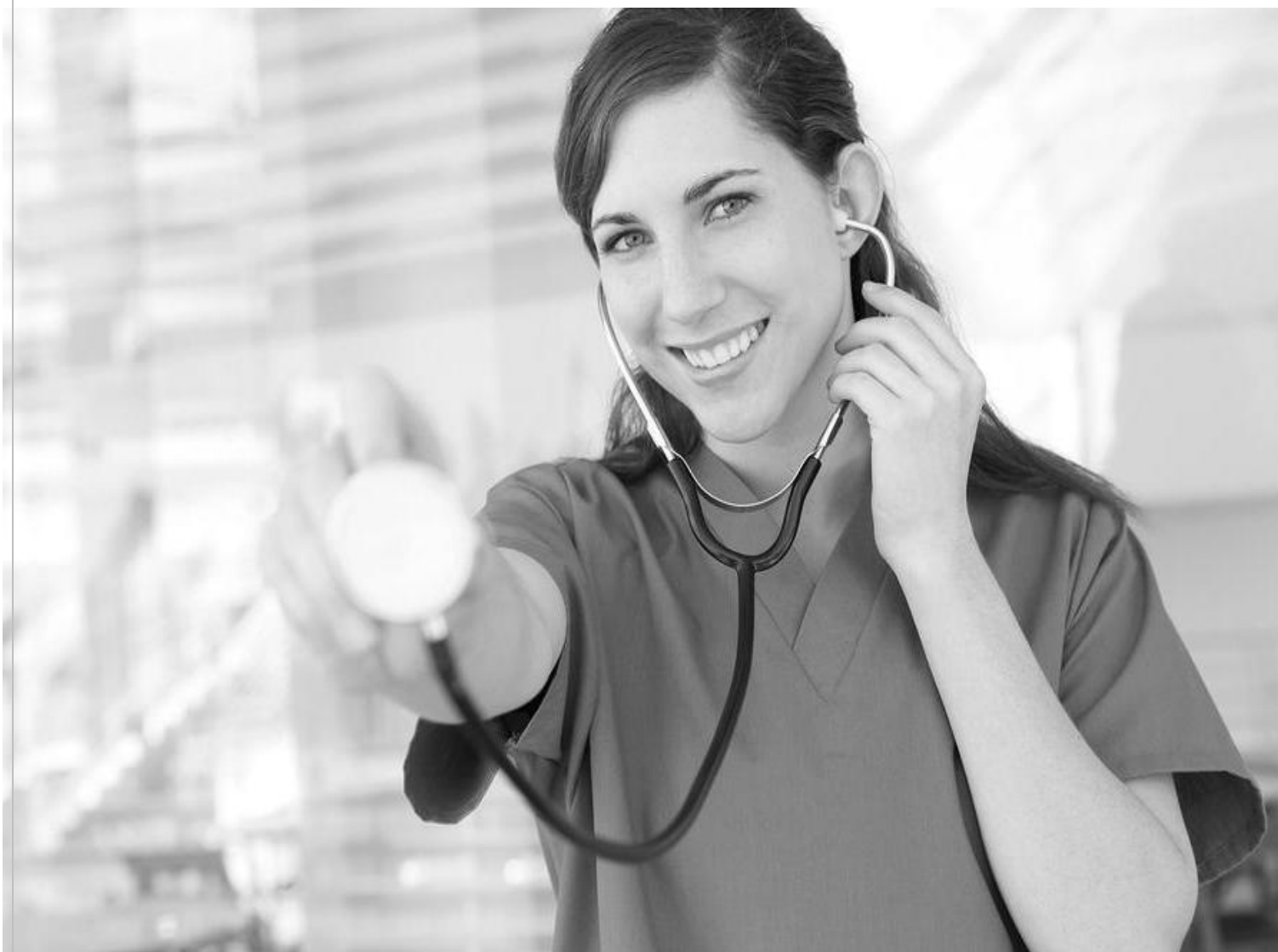


May 2015  
VERSION 02

# Capacity Management

## Quick Reference Guide



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## ***CAPACITY MANAGEMENT BACKGROUND***

Patient Flow Management Solution (PFMS) was a project to incorporate patient tracking, deployment of support services (two-way communication) and an electronic bed board. Capacity Management is the Cerner application implemented in 2013. It assists in making patient access decisions in real-time, with up-to-date hospital-wide bed activity information.

The system:

- Identifies when beds become available.
- Identifies the cleaning status of a bed.
- Provides the ability to see bed activity in the entire hospital.
- Tracks the cleaning process and provides feedback/metrics for Environmental Services.

## ***SUPERUSER ROLE***

- Assist with the initial set up of perspectives for staff.
- Support staff with the orientation of Capacity Management.
- Ensure users are aware of the processes in place to maintain patient attributes, etc.
- Act as a first point of contact for Capacity Management issues for your area. (Troubleshoot minor issues – liaison with Help Desk and Clinical Informatics).

## ***GADGET SUMMARY AND FUNCTIONALITY***

The following describes the functionality of each Capacity Management Gadget.

### **Patient List**

The Patient List provides information on the attributes, transfer/discharge status of your patient and the status of the room. On the Patient List you may do the following functions based on your role:

- Modify patient attributes.
- Manage a patient transfer (admitting areas only).
- Enter an adhoc clean.
- A patient discharge.
- Launch PowerChart.

### **Discharge List**

The Discharge List provides information about the discharge status of the patient. On the Discharge List you may do the following functions based on your role:

- Manage a patient discharge.
- Launch PowerChart.

### **Transfer List**

The Transfer List provides information on the status of the patient's transferring to or from your unit(s). On the Transfer List you may do the following functions based on your role:

- Manage patient transfer (including Hold an inpatient bed for a patient).
- Modify patient attributes.
- Assign/Unassign badges (admitting areas only).
- Launch PowerChart.

## Pre-Admit List

The Pre-Admit List provides information on the status of the patient's preregistered to your unit(s). On the Pre-Admit List you may do the following functions based on your role:

- Manage a Pre-Admit.
- Modify patient attributes.
- Launch PowerChart.

## Floor Plan

The Floor Plan provides information on the physical layout of each inpatient unit. On the Floor Plan you may do the following functions based on your role:

- View the bed status and assigned patient information.

## Bed Board

The Bed Board provides information on facility status, including status of beds, occupancy and assignments. Access to this gadget is limited to specific roles. On the Bed Board you may do the following functions based on your role:

- Manage patient transfers and pre-admit assignments.
- Update the status of a bed.
- Manage Discharges.
- Request Adhoc Clean.
- Manage Patient Attributes.
- Filter the bed board display.
- Launch PowerChart.

## Custodial Services

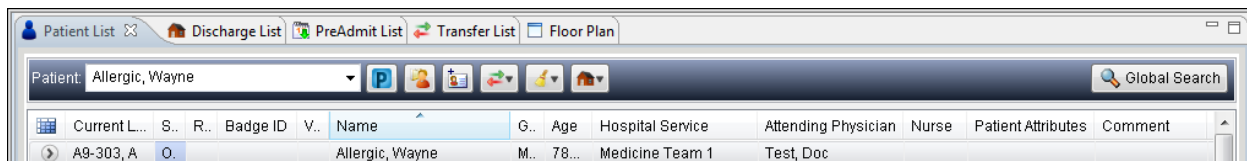
This gadget is only available to Admitting and Housekeeping and ESW management.

- Supports the workflow and notification needs of housekeeping (HSK) and ESW patient care area cleaning teams.
- Functions to optimize the process of cleaning patient care locations.

## GADGET DETAILS

### PATIENT LIST

The Patient List provides timely information on the attributes, transfer/discharge status of your patient and the status of the room.



Although the following column order is recommended, you can customize your patient list column view by adding and moving the columns (see below).


#### Recommended Columns and Order from Left to Right (Nurses and Clerks)

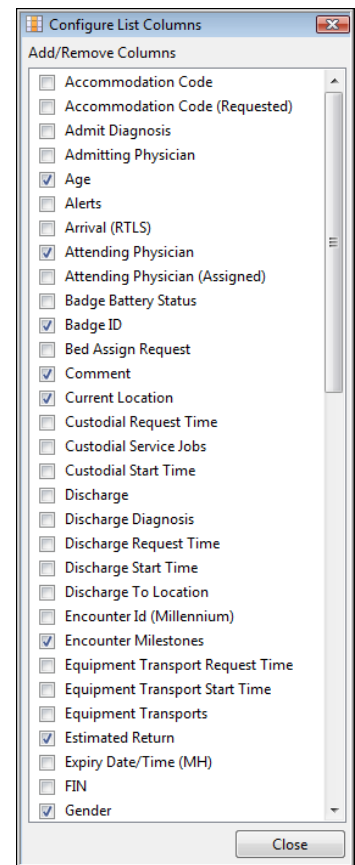
- Current Location
- Status (bed)
- RTLS location (real time patient location)
- Badge ID
- VIP (anonymous)
- Name
- Gender
- Age
- Hospital Service
- Attending Physician
- Nurse
- Patient Attributes
- Comment
- Notes (Clinical) (2<sup>nd</sup> comment text field)
- Encounter Milestones
- Transfer Destination
- Location Milestones
- LOS (length of stay)
- MRN (PIN #)

## Working with Columns

Each gadget needs to be set to show the desired columns.

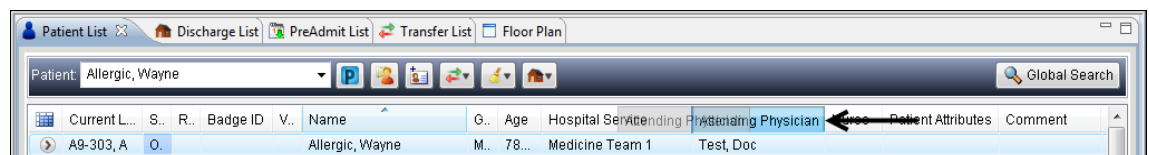
### Add and Remove Columns

1. Click the **list properties** icon  to add columns.
2. Click **Configure List Columns**.
3. Add checkmarks to columns you wish to see and remove checkmarks for columns that are not desired.
4. Click **Close**, not the **X**.



### Moving Columns


1. Click and hold on a column header you wish to move.
2. Drag the column to a new location and release the mouse.  
You will see a gray line on the header row indicating where you are about to drop the column.



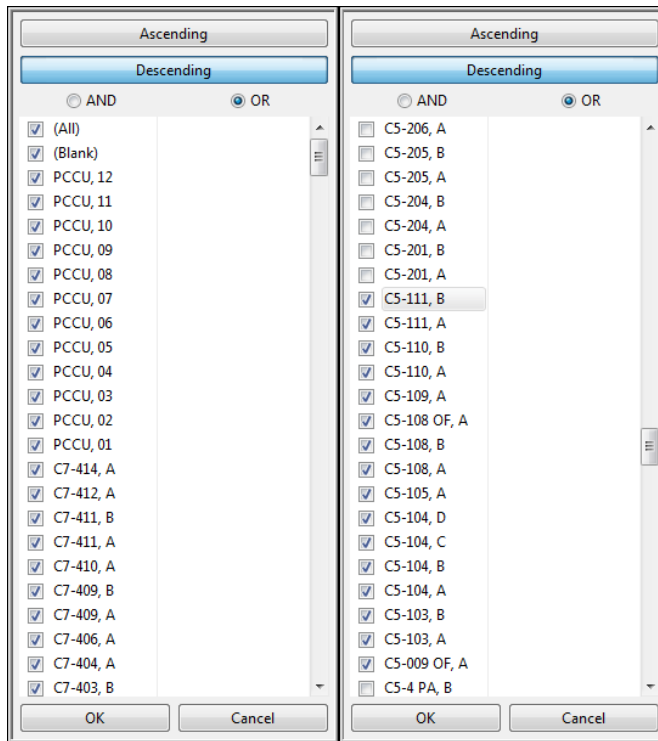
### Creating Filter on a Column


Filtering allows you to streamline your view (i.e. filter to view multiple units (e.g. C5-100 and Step Down Unit) or selected services).

#### Creating a Location Filter

1. Ensure that your Location bar is set to one level higher (eg. Zone C) then the units you wish to filter to (C5-100 and C5-100 Step Down).
2. Click on the **List Properties** icon .
3. Click on **Filter/Sort Properties**.
4. Click on the column heading you want to filter on (Current Location).
5. Uncheck the All and Blank options by clicking on the checkmark. Then select (add a checkmark) to each of the beds you wish included in your filter.



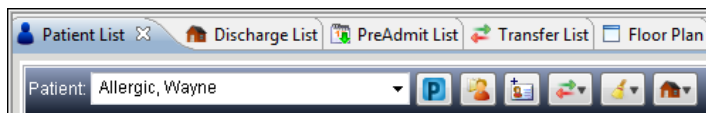


6. A funnel  will appear in the column header after a filter has been applied.

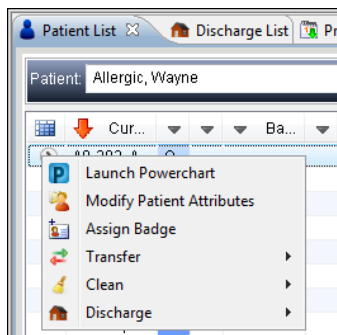
## Accessing Patient List Functions

There are two places to access **Patient List** functions. All functions, except Clean, require that patient is selected.

1. From the **menu bar** of the patient list, the available function icons will appear.



2. Alternatively, you may click in the far left column beside a patient's name and select from the **drop-down list** which appears.



## TRANSFER LIST

The **Transfer List** is used to see information about patients who are moving on and off of the unit. **Incoming** and **Outgoing Transfer filters** can be set up to show only patients coming into or moving out of the specific unit.

The screenshot shows a web application interface for a Transfer List. At the top, there are tabs for Patient List, Discharge List, PreAdmit List, Transfer List (active), and Floor Plan. Below the tabs, there are filters for Incoming U7 (0/0) and Outgoing U7 (2/2). A search bar shows 'Patient: Morelli, Joe'. Below the search bar is a table with the following columns: Current Location, Name, MRN, Gender, Age, Destination, Comment, and Patient Attributes. The table contains two rows of data:

Current Location	Name	MRN	Gender	Age	Destination	Comment	Patient Attributes
<a href="#">A7-210_A</a>	Morelli, Joe	11940778	Male	35...	<a href="#">A6-103_A</a>		
<a href="#">A7-210_E</a>	CapMan, Michelle	11940779	Fe...	36...	<a href="#">A9-303_B</a>		

Although the following column order is recommend, you can customize your patient list column view by adding and moving the columns (see below).

### Recommended Columns and Order (Left to Right)

- Current Location
- VIP (anonymous)
- Name
- MRN (PIN #)
- Gender
- Age
- Destination
- Comment (Transfer comments only)
- Patient Attributes
- RTLS location (real time patient location)
- Nurse


### Working with Columns

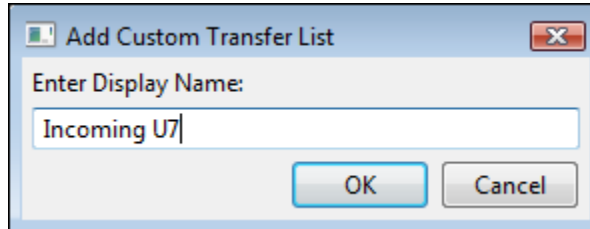
Each gadget should be set to show the desired columns (see Patient List Gadget for instructions).

### Creating Custom Lists within the Transfer List

You can create custom lists to filter patients in multiple ways. Assign a name to the list that reflects the information it will display. Then filter and sort the information in the list to display only the relevant information. It is recommended that you create an **Incoming** and an **Outgoing** transfer list.

### Creating a Custom Transfer List

1. On the **Transfer List** click on the **List Properties** icon .
2. Select **Add Custom List**.
3. Type **Incoming** and your unit name in the **Enter Display Name** field.
4. Click on the **OK** button.



5. Repeat **steps 3 to 5** to create an **Outgoing** list.

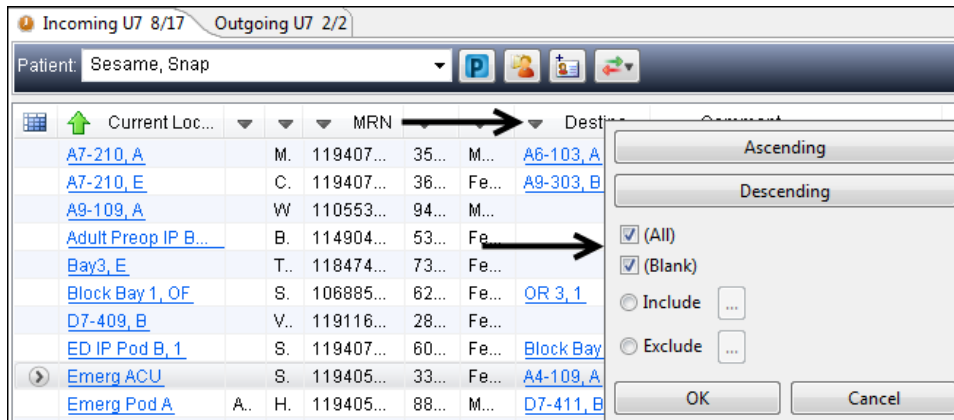
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**Important** A tab will appear for each of the created lists just under the Transfer List.

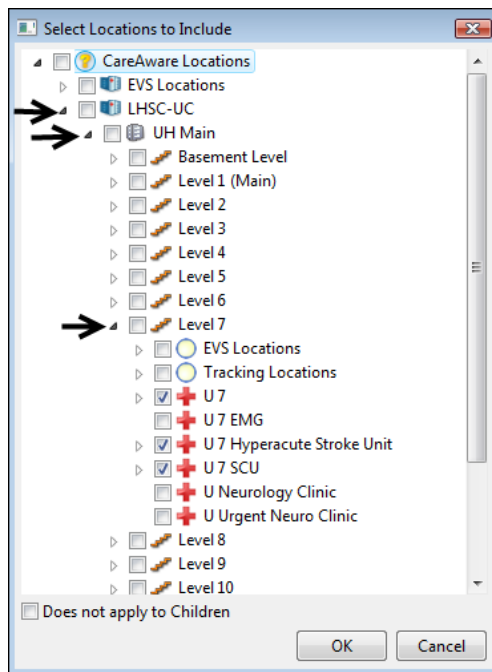
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### Filtering for an Incoming Transfer Lists

1. Select the **Incoming** tab.
2. Click on the **List Properties** icon for that tab.
3. Click **Filter/Sort Properties**.
4. Click on the **Destination** column heading.



5. Remove the checkmark for **All** and **Blank** by clicking in the checkbox.
6. Click on **Include** and then the ellipsis button ... .
7. Drill down to the location by clicking the **+ sign** beside site, area and zone (The + signs will turned to a – sign when the category has been expanded out).



8. Add a checkmark in the box for the desired location(s).
9. Click **OK** to return to the main screen.

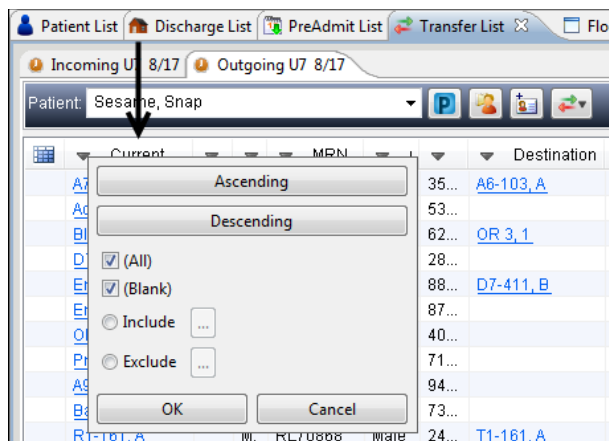
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**Important** Only the patients being transferred **to** this location should be displayed.

---

### *Filtering for an Outgoing Transfer List*

1. Select **Outgoing** tab.
2. Click **List Properties** icon.
3. Click **Filter/Sort Properties**
4. Click on the **Current Location** column heading.



5. Repeat steps 6 to 10 from **Incoming List** set up.


---

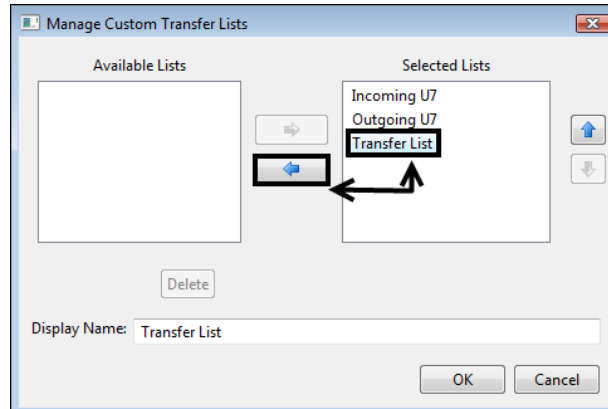
**Important** Only the patients being transferred **from** this location should be displayed.

---

## Removing (Delete) a Custom Transfer List

On the **Transfer List**:

1. Click on the **List Properties** icon .
2. Click **Manage Custom Lists**.
3. Click on the list you wish to remove.
4. Click the arrow pointing left to move to the available list.



5. Click **Delete**.
6. Click **OK**.

## Viewing the Room Status for an Outgoing Patient

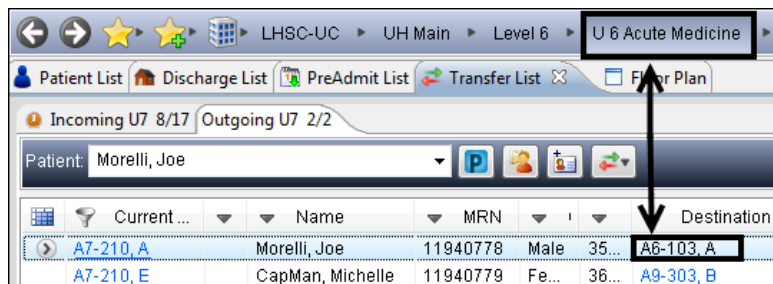
You may access information on the Patient List for patients leaving your unit who have been assigned a bed. Once the patient's transfer destination is displaying in the Transfer Destination column, you can monitor the bed status by clicking the hyperlink. Once the bed becomes available, the patient can be transferred to it.

*On the Patient List Gadget or the Transfer List Gadget*

1. Click the **blue hyperlink location** for your patient in the **Destination** column.

Current ...	Name	MRN	Gender	Age	Destination
A7-210, A	Morelli, Joe	11940778	Male	35...	<a href="#">A8-103, A</a>
A7-210, E	CapMan, Michelle	11940779	Fe...	36...	<a href="#">A9-303, B</a>

- This will change the Location Navigator tool bar to the assigned unit/bed.



- On the **Patient List** you can now see the status of the assigned bed.

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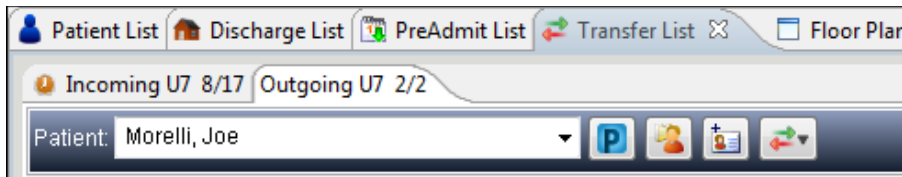
**Important** The receiving unit will complete the transfer in PowerChart.

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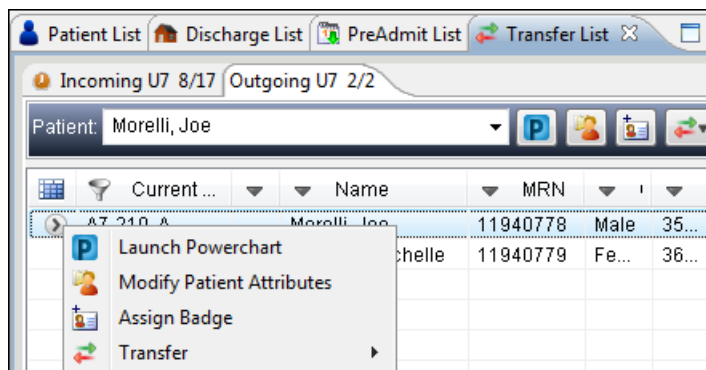
## Accessing Transfer List Functions

There are two places to access Transfer List functions.

- From the **menu bar** of the **Transfer List**, with a patient highlighted, the available function icons will appear.



- Alternatively, you may click in the far left column beside a patient row and select from the drop down list which appears.



## DISCHARGE LIST

The **Discharge List** allows you to monitor the discharge status of patients ready for discharge (House assigned) and is a quick reference for when the patient is ready to be discharged from PowerChart (all patients with a red dot can be discharged from PowerChart).

Curre...	Name	M...	Hospital Ser...	Attendin...	Patient Attrib...	E	Patient Depar...	Com...	Delay Rea...
A7-105, A	CapMan, Michelle2	11940...	General Medicine	Test, Doc			2014-08-20 13:33		
A7-210, E	CapMan, Michelle	11940...	Cardiology	Test, Doc					

### Recommended Columns and Column Order from Left to Right

Although the following column order is recommended, you can customize your patient list column view by adding and moving the columns.

- Current Location
- VIP (anonymous)
- Name
- MRN (PIN #)
- Hospital Service
- Attending Physician
- Patient Attributes
- Encounter Milestone
- Patient Depart Time (can be used as Discharge Time on PowerChart)
- Comment
- Delay Reason
- Nurse

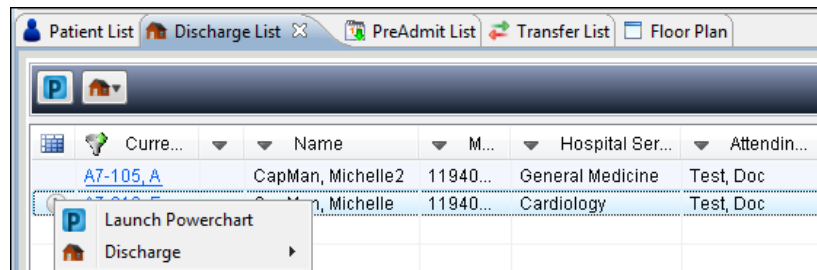
### Working with Columns

Each gadget should be set to show the recommended columns (see Patient List Gadget for instructions on Working with Columns).

## Accessing Discharge List Functions

There are two places to access Discharge List functions.

1. From the menu bar of the Discharge list, the available function icons will appear.

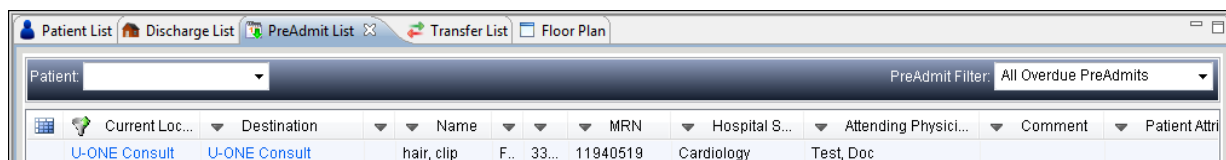


2. Alternatively, you may click in the far left column beside a patient row and select from the drop down list which appears.

## PRE-ADMIT LIST

The **Pre-Admit List** displays patients who have been accepted as an admission to the hospital but have not yet arrived.

Once a destination has been assigned by bed management, then these patients will appear on the floors Pre-Admit list as a notification that a patient will be arriving on your floor.



## Recommended Columns and Order (Left to Right)

Although the following column order is recommended, you can customize your patient list column view by adding and moving the columns Current Location (type of admission or room number if assigned).

- Current Location
- Destination (assigned location)
- VIP (anonymous)
- Name
- Gender
- Age
- MRN (PIN#)
- Hospital Service
- Attending Physician
- Comment (specific for Pre-Reg planning)
- Patient Attributes
- Patient Type (Pre-Reg Inpatient, Pre-Reg Outpatient, Pre-Reg One Day Stay)



## Working with Columns

Each gadget should be set to show the recommended columns (see **Patient List Gadget** for instructions on **Working with Columns**).

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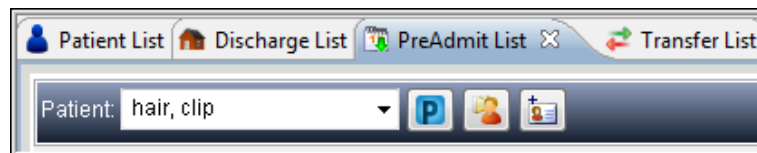
**Important** A filter must be set on **Current Location** for the site you need to view. Additionally a filter must be set on **Patient Type** to only see **PreReg Inpatient**. Finally, you will need a filter on the **Destination** column set to your unit(s).

---

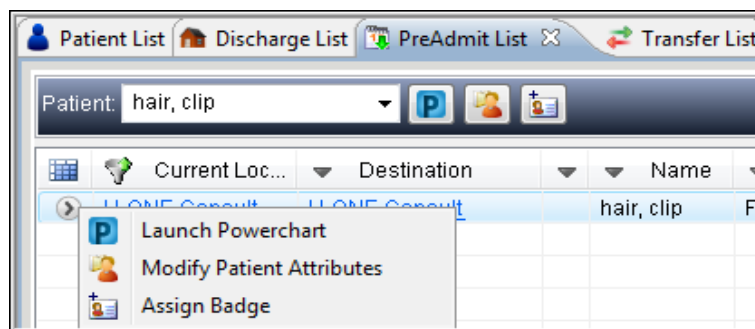
## Accessing Pre-Admit List Functions

There are two places to access Pre-Admit List functions;

1. From the **menu bar** of the **Pre-Admit List**, with a patient highlighted, the available function icons will appear.



2. Alternatively, you may click in the far left column beside a patient row and select from the drop down list which appears.



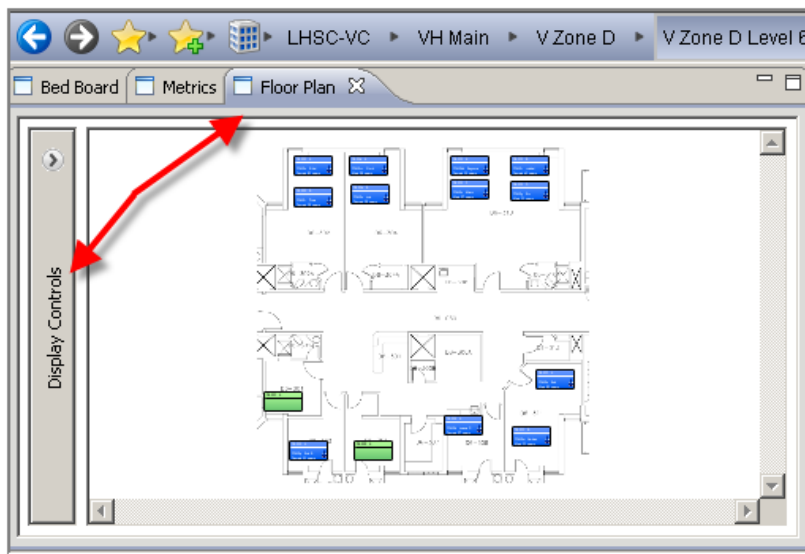
## FLOOR PLAN

The Floor Plan provides information on the physical layout of each inpatient unit. On the Floor Plan you may do the following functions based on your role:

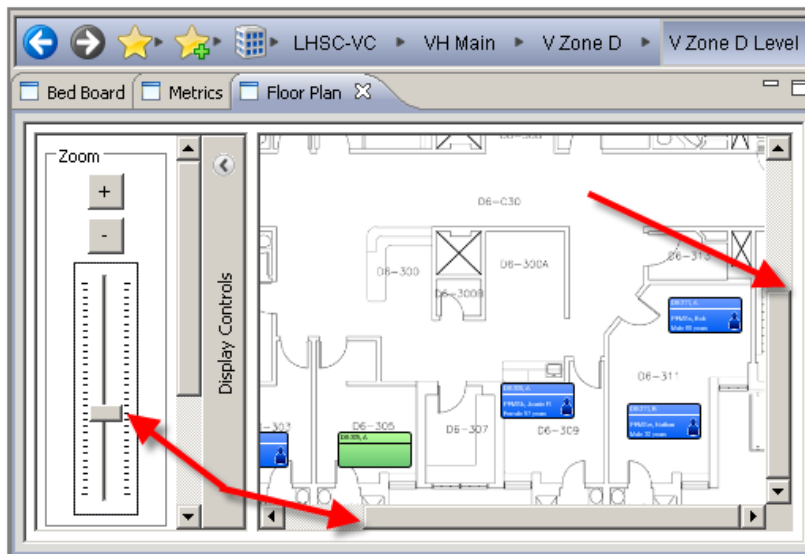
- View the bed status and assigned patient information.
- The Floor Plan will display the unit.

### Zoom In and Out

1. Click **Display Controls** to zoom in and out of floor plan.



2. Drag the zoom bar up or click the + to zoom in to see room in more detail.
3. Drag the zoom bar down or click the – to zoom out to see more rooms on the floor.



## PERSPECTIVES

When you first log into Capacity Management you will see the message “You are not authorized to access this gadget”. This message only displays before you have set up your perspective. Complete the following steps to set up your perspective.

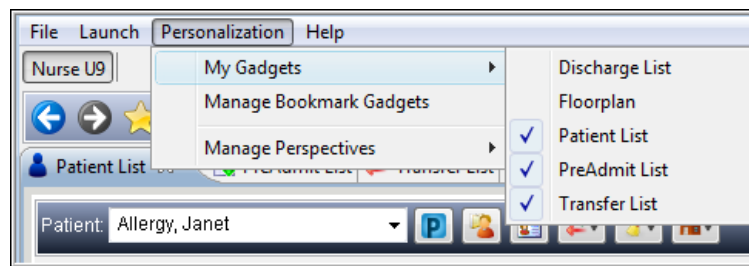
### Remove all initial Gadgets

1. Click on the white **X** beside each gadget name to remove it from your perspective.

### Add a Gadget

1. Click **Personalization** on menu bar.
2. Select **My Gadgets**.
3. Then click **the required gadgets**.

If the option is not available, then you are not authorized to view the gadget.



### Move Gadgets

1. Place your mouse pointer over the gadget (tab) to move.
2. Hold your left mouse button down and drag the gadget to the new location.
3. Release your left mouse button.

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**Important** The recommended position of the gadgets varies according to your position, so discuss the recommended placement of the gadgets with your Superuser.


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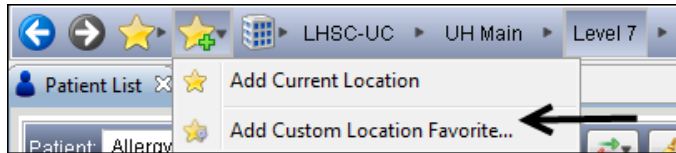
### Gadget SetUp

Each of the Gadgets can now be set up with columns and filters as described under the Gadget details previously reviewed in this document.

### Set Location and Location Favourites

1. Click on the hospital icon.
2. Select your facility.
3. Click the arrow beside the facility to drill down to your specific unit.

- Click the **Add to Favorite** icon  and click **Add Current Location** to create this location as a favourite.



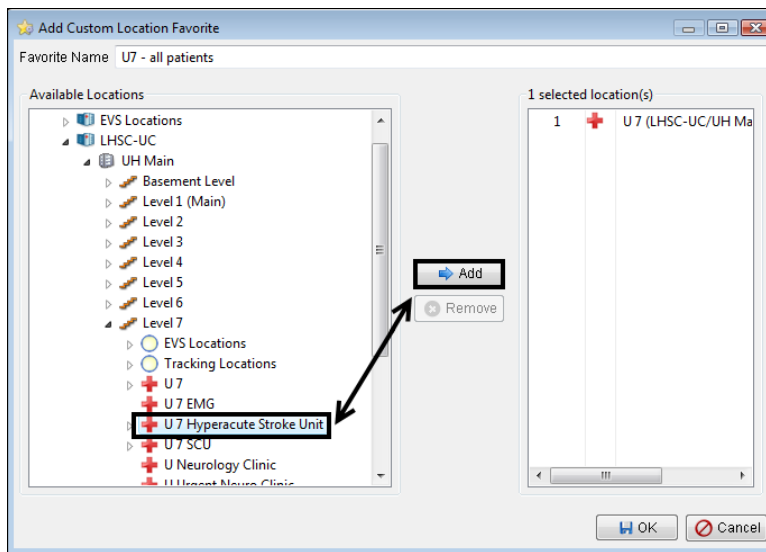
- If your unit consists of more than one unit, ie contains a step-down unit, click the **Add to Favorite** icon and click **Add Custom Location Favorite**.


---

**Important** Custom Location Favorites cannot be used when Launching Showboard.

---

- In the Available Locations window, click the arrow beside your facility to expand the selections. Click on the arrows located at the floor level.
- Click on the unit you want to add to your custom location and then click **Add**.



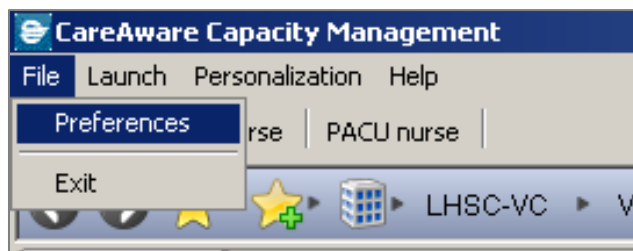
- Repeat this step until you have all the units you want in your custom location favorite in the left hand side of the window.
- Enter a name for your list in the **Favorite Name** field.
- Click **OK**.
- View your **Custom Location Favorite**, click on the **Manage Favorite Locations** icon  and click on the appropriate favorite location.

## Adjusting Settings for Anonymous Patients

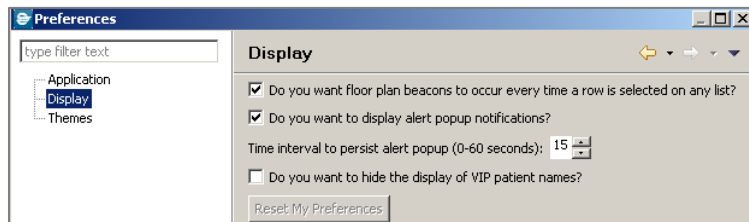
For patients who request to be anonymous, a filter must be set so the patient's name does not appear on patient list.

### To Set Anonymous Filter

1. Log into **Capacity Management**.
2. Click on **File** far upper left hand corner of screen.
3. Click on **Preferences**.



4. The **Preferences** window will appear, click on **Display**.



5. Click to add checkmark on **Do you want to hide the display of VIP patient names?**
6. Click **OK**.

---

**Important** The patient's name will change to asterisks. Hovering over the asterisks will display the patient's name.

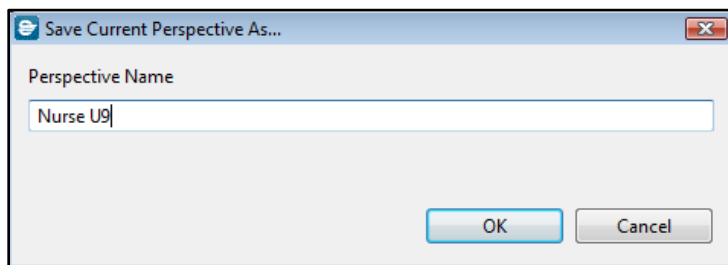
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## Save a Perspective

1. Once the original **Dashboard** perspective has been customized, click **Save** icon at the far right.

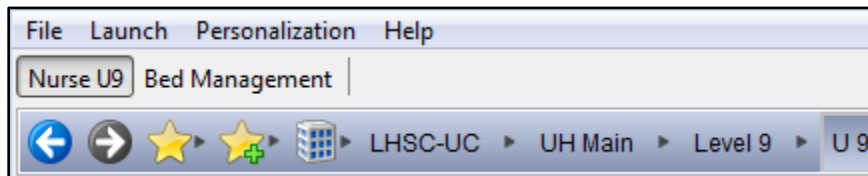


2. In the **Perspective Name** field, type in the name. Example **Nurse U9**.
3. Click **OK** to close the **Save Current Perspective As...** dialog box.



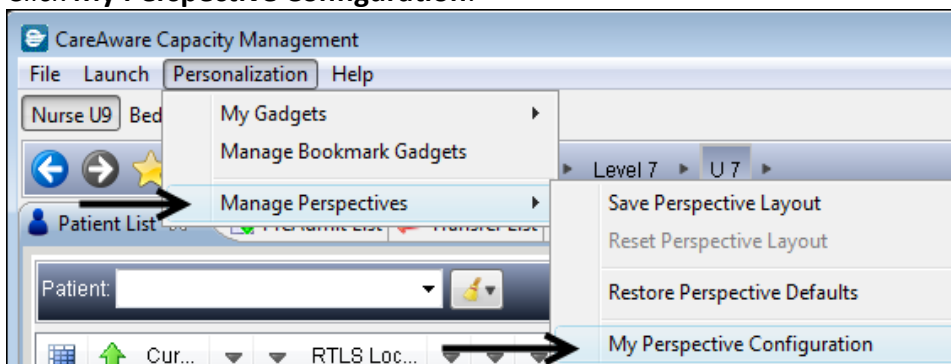
4. Click **OK** to close the **Save Success** dialog box.

The perspective name will indicate which perspective is being displayed.

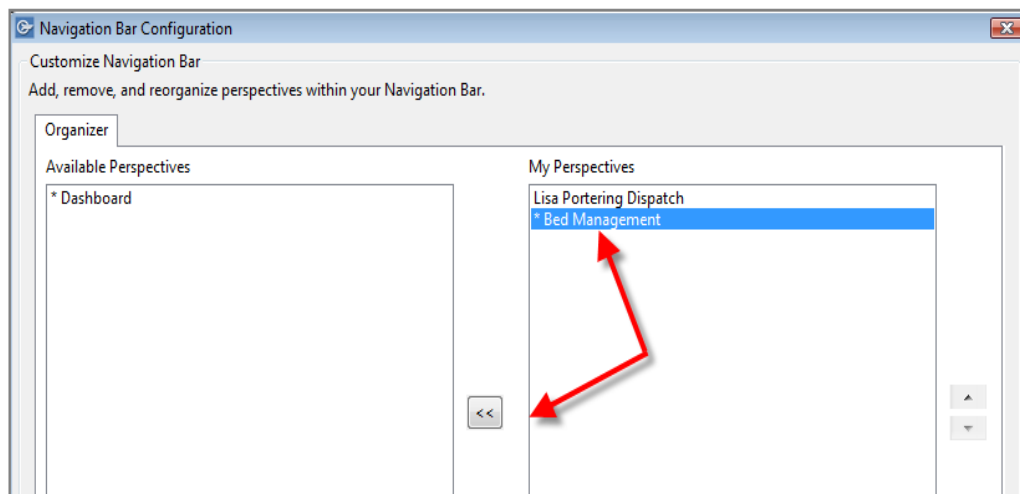


### Removing Bed Management Perspective from View (First time setup only)

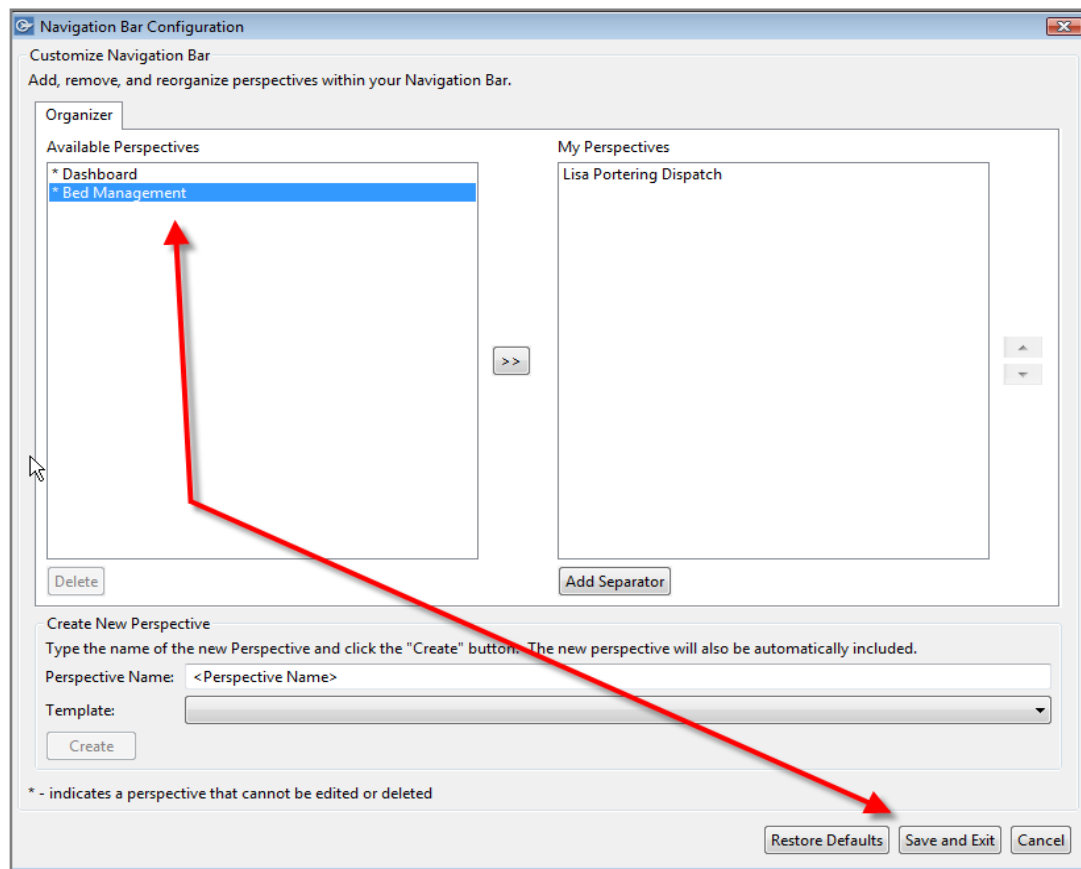
1. Click **Personalization**.
2. Select **Manage Perspectives**.
3. Click **My Perspective Configuration**.



4. Click **Bed Management**.
5. Click left **arrow**.



- Once Bed Management appears under **Available Perspectives** section, click **Save and Exit**.



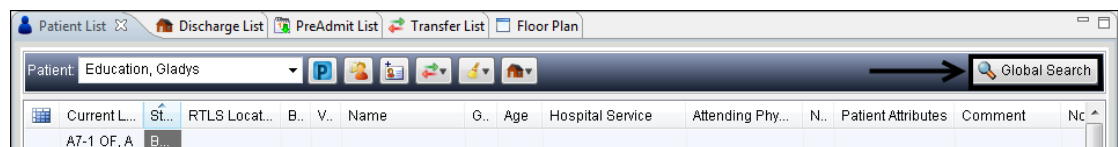
## GLOBAL SEARCH FOR A PATIENT

You can do a Global Search in certain gadgets. Global searches can be done by entering the patient's first name and last name or PIN. The global search will generate a list of patients matching the information entered.

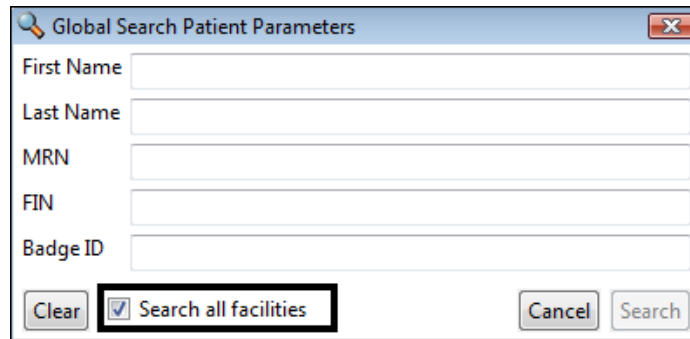
### Global Search

For a more accurate search, you should type search information in more than one field.

- Click **Global Search**.



- Complete the search field(s) you have information for.
- Uncheck **Search all facilities** so that only patients registered to the currently selected facility Location will appear. Some users do not have the ability to Search all facilities. (Privacy requirement)



Global Search Patient Parameters

First Name

Last Name

MRN

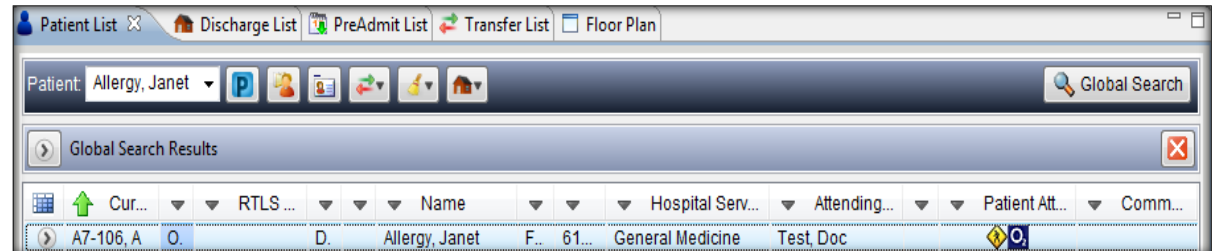
FIN

Badge ID

Clear  Search all facilities Cancel Search

4. Click **Search**.

The patient information will be displayed as appropriate for the gadget you are in.




Patient List Discharge List PreAdmit List Transfer List Floor Plan

Patient: Allergy, Janet

Global Search

Global Search Results

Cur...	RTLS ...	Name	Hospital Serv...	Attending...	Patient Att...	Comm...
A7-106, A	O	Allergy, Janet	F.. 61..	General Medicine	Test, Doc	

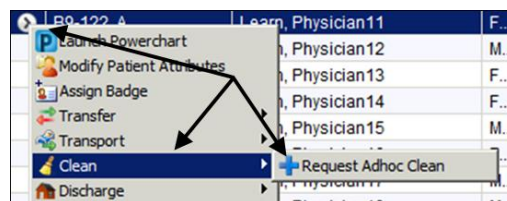
5. To exit Global Search, click on the  icon to return to the original gadget view.

## REQUEST A CUSTODIAL SERVICE ADHOC CLEAN

When a location needs to be cleaned, other than after a transfer or discharge, an Adhoc clean may be requested.

### Request Adhoc Clean

1. On a gadget with the **Clean** functionality click on the location to be cleaned.
2. From the **menu** or **toolbar** click on the **Clean** (broom) icon.
3. Click **Request Adhoc Clean** to open the **Create Adhoc Custodial Services Request** window.





- Verify the correct location appears in the **Location** field.

**Important** If the clean is required in a non-patient area, change the location to the unit zone (e.g. Zone D Level 6 400) and identify the exact location in the Adhoc job details box.

- Click in the **Adhoc Job Details** field and type any specific information regarding what needs to be cleaned; example **spill on floor**.
- Type in a reason for the adhoc clean.
- Click **OK**.
- A broom icon will appear in the Location Milestones column on relevant gadgets.

**Important** If multiple Custodians are required, notify ESW deployment clerk.

## LAUNCHING POWERCHART

While in Capacity Management you can access a patient's chart (if your position allows this) by clicking on the PowerChart icon on any screen or window.

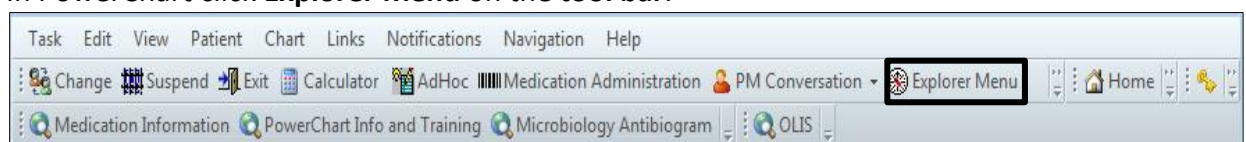
## HOW TO ASSIGN NURSES TO PATIENTS

You assign nurses to patients in PowerChart. The process for when and how this information is inputted into the computer is unit specific.

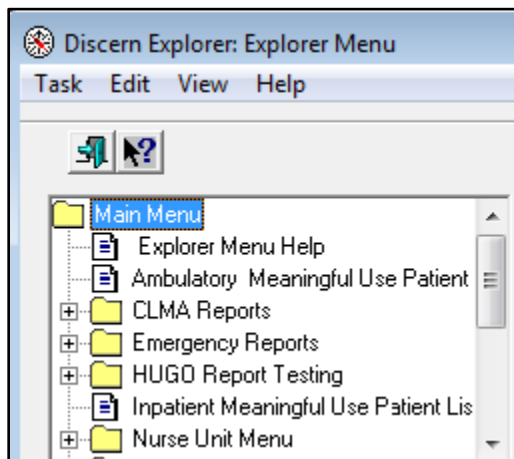
You can access PowerChart by logging into PowerChart or using Capacity Management.

## Open PFMS Nurse Assignment Tool in PowerChart

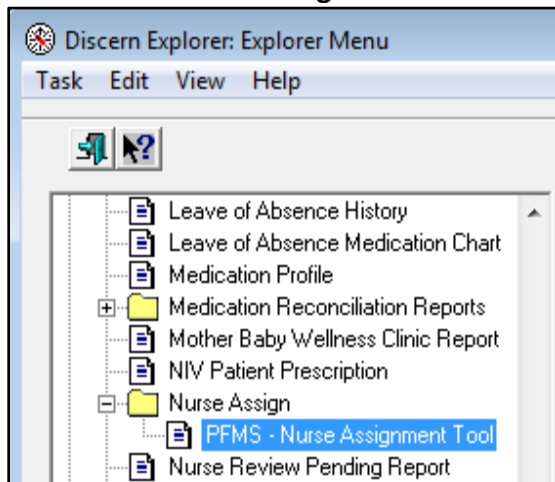
- In PowerChart click **Explorer Menu** on the **tool bar**.



- Click on the **Main Menu** on the left hand side of the **Explorer Menu**.
- Click on the **+** sign beside the **Nurse Unit Menu**.



4. Click on the + sign beside **Nurse Assign**.
5. Click **PFMS – Nurse Assignment Tool**.

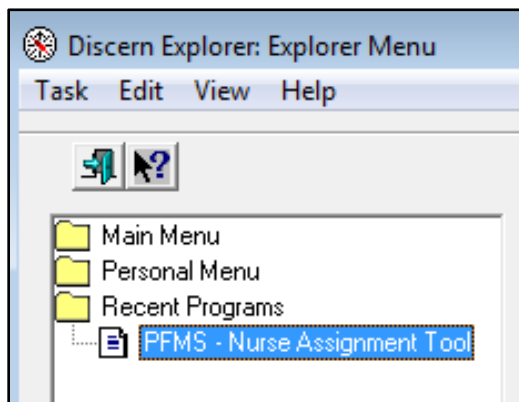


*The left hand side of the Explorer Menu will now display empty fields that need to be completed.*

---

**Important** Once you have opened PFMS – Nurse Assignment Tool, it will appear under **Recent Programs** in the Explorer Menu window.

---



### Assign a Nurse to Patient

1. Enter the nurse's **last name** and then press **tab** key on keyboard.
2. All nurses with this last name will appear, **click** on the correct nurse – make sure the nurse's name is highlighted with blue shading.
3. Click the **down arrow** in the **Facility** field.
4. Select the correct hospital.
5. Click the **down arrow** to choose the **Nurse Unit**.
6. Select your unit.
7. All the patients on the unit will appear - click in the **check box(s)** beside the patient(s) name to assign to the nurse.

Output to File/Printer/MINE: success

Remove Primary Nurse from selected patients:

Nurse Last Name: hennessy

Nurse Select:

NAME_FULL_FORMATTED	DISPLAY
Hennessy, Michelle (RN)	DBA

Facility: VH Main

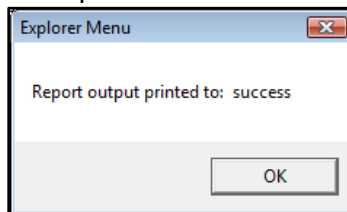
Nurse Unit: V Zone D Level 6 300

\*Visit List

ROOM	PIN	VISIT	NAME_LAST	NAME_FIRST
<input type="checkbox"/> D6-301, A	11842547	420704182	PFMSv	Betty
<input checked="" type="checkbox"/> D6-301, A	11842553	420704443	PFMSbb	Beyonce
<input checked="" type="checkbox"/> D6-302, A	11842551	420704669	PFMSz	Ethel
<input checked="" type="checkbox"/> D6-302, B	11842545	420704697	PFMSl	Trina
<input checked="" type="checkbox"/> D6-303, A	11842571	420704172	PFMSp	Bula
<input type="checkbox"/> D6-304, A	11842555	420704702	PFMScc	Gord
<input type="checkbox"/> D6-304, B	11842557	420704701	PFMSb	Joanie
<input type="checkbox"/> D6-305, A	11842651	420704606	PFMSjb	Justin
<input type="checkbox"/> D6-310, A	11842546	420704523	PFMSu	Mark
<input type="checkbox"/> D6-310, B	11842543	420704531	PFMSr	Lulahall

Execute

8. Click **Execute** at the bottom right.
9. An explorer menu window will pop up, click **OK**.



6. Close **PFMS Nurse Assignment Tool** by clicking the **X** at the top left.
7. Close out of **PowerChart**.
8. Refresh the **Capacity Management** screen by clicking the **minutes ago** button.
9. The nurse's name will appear under the Nurse column for the patient.

Curr...	Status ...	RTLS ...	Name	Gender	Age	Nurse
D6-301, A	Occupi...		PFMSbb, Beyonce	Female	29 years	Hennessy, Michelle
D6-302, A	Occupi...		PFMSz, Ethel	Female	80 years	Hennessy, Michelle
D6-302, B	Occupi...		PFMSl, Trina	Female	36 years	Hennessy, Michelle
D6-303, A	Occupi...		PFMSp, Bula B	Female	93 years	Hennessy, Michelle
D6-304, A	Occupi...		PFMScc, Gord	Male	58 years	


---

**Important** When subsequent nurses are assigned to this patient, they will bump the nurse's name that presently appears.

---

## MODIFY PATIENT ATTRIBUTES

This function can be done by users depending upon their role. You can do the following from any gadget with the **Modify Patient Attributes** icon.

1. Highlight a patient.
2. Click on the **Modify Patient Attributes** icon .
3. In the Modify Patient Attributes window add or remove attribute checkmarks. Some users are able to modify Automated attributes (those generated only from orders) which will appear at the bottom of the window.

4. Click **OK**.

## TRANSFER PROCESS

Unit nurses complete the transfer process in PowerChart when the patient is transferred to their unit.

---

**Important** More detailed information will be provided at a later date.

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## DISCHARGE PROCESS – WIPE / DROP / DISCHARGE

The discharge process involves using predictive care and discharge icons that indicate the patient's readiness to be discharged.

For **LHSC** the colours associated with the predictive care icons indicate the following:

- Red - Not ready for discharge.
- Yellow – Discharge expected within 72 hours.
- Green – Patient is ready to be discharged within 24 hours and/or has a discharge order.

---

**Important** All discharges must still be completed in Powerchart for the patient to be removed from the patient list.


---

## How to Discharge a Patient

### *Patient is a Potential Discharge*

Initiate discharge using your **Patient List**.


1. Click on patient's name.
2. Click on **Discharge (house) icon** in action tool bar.
3. Click on **Discharge Patient**.

The **Discharge icon**  will appear in the **Encounter Milestone** column and the patient will appear on the **Discharge List**.

### *Patient is Now a Confirmed Discharge, Going Home TODAY*

Modify the discharge to update the patient discharge status using either your **Patient List** or **Discharge List**.


1. Click on patient's name.
2. Click on **Discharge (house) icon** in action toolbar.
3. Click on **Start Discharge**.

The house will update to a house with a **green dot**  in the Encounter Milestone column.

### *Patient is Ready to Leave*

1. Cut off patient armband and locator badge.
2. Separate locator badge from arm band.
3. **WIPE:** Wipe the locator badge as per standard Infection Control wiping policy.
  - a. Badge must be wiped prior to removing it from the room by the nurses (or delegate) caring for the patient.
  - b. If the badge is visibly soiled, wipe a second time to remove debris.
  - c. Discard the armband in the confidential bin.
  - d. Take the badge to the discharge bin.

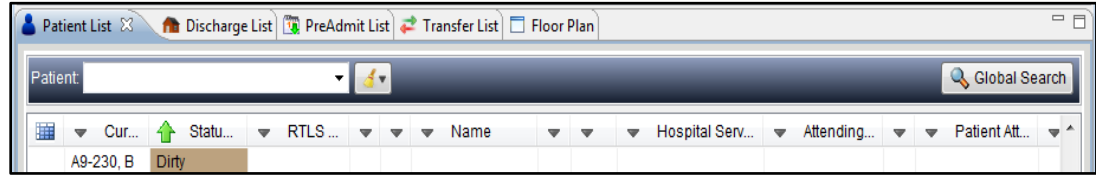
4. **DROP:** Drop the locator badge in discharge bin.

The house with a **green dot** will update to a house with a **red dot**  in the **Encounter Milestone** column if the dot does not turn red, please contact the Help Desk.

5. **DISCHARGE:** Discharge the patient from PowerChart by opening the chart from the **Patient List** or **Discharge List** (select the PowerChart icon) and then complete the Discharge in the **PM Conversation** dropdown.

Patient's name will fall off of the Patient List (and all other Gadgets).

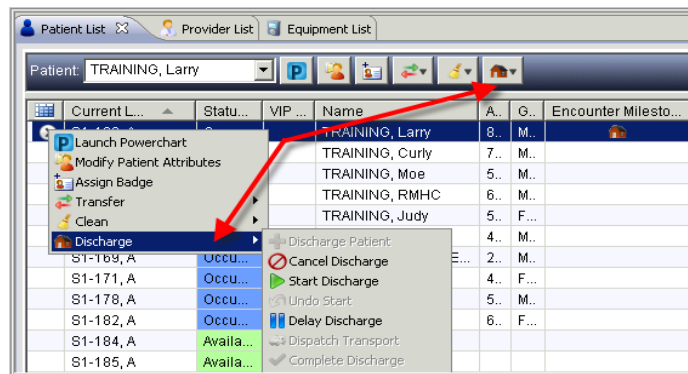
Bed status will change to **Dirty** on patient list.



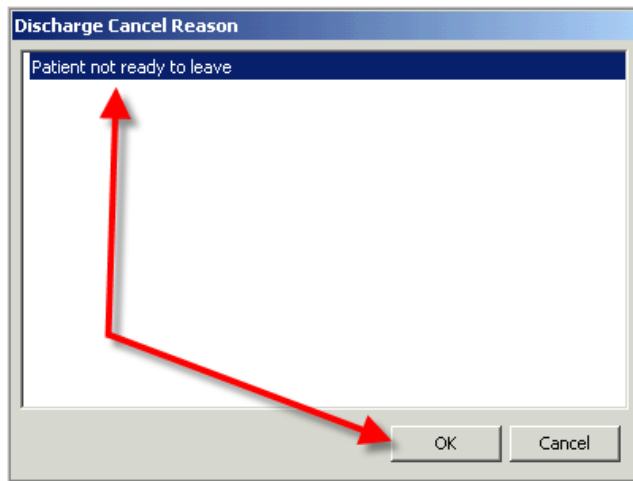
### *If the Patient's Condition Changes*

You can delay or cancel the discharge.

1. Click on patient's name.
2. Click **Discharge (house) icon** in the action toolbar.
3. Click on **Cancel Discharge** or **Delay Discharge**.



4. Type the Delay or Cancel reason.
5. Click **OK**.




---

**Important** The discharge icon will be removed from the milestone encounter field for your patient.

---

## SHOWBOARDS

The Showboards were installed to support care providers with the following:

- Display the unit's patient list for quick viewing of RTLS locations and patient care needs through patient attributes.
- Act as a communication tool via of the comment field(s).
- Display the nurse assignment for ease of identifying the nurse caring for a patient.
- To be used as a tool during bullet rounds.

## COMMON ISSUES AND TROUBLE SHOOTING

When I log into Capacity Management it says "I'm not authorized to view this gadget"

This is the default view that new users will see the first time they log in;

- There will be several tabs visible across the top of the page.
- Click on the X in each tab (right to left) to remove them.
- Click on Perspectives (top left of page).
- Click on my gadgets.
- All gadgets you have access to will be visible.
- Click on the gadgets that you would like to have - **Patient List/Transfer List/Pre-Admit List.**

You will then continue on with your set up.

Why don't I have any Gadgets in in my Perspectives tab?

This happens when you do not have the correct "position" for Capacity Management access (not all employees of the hospital require Capacity Management access to perform their role).

- Phone the Help desk.
- Identify to them that you do not have access to Capacity Management and that you require access for your work.
- They will ask for details on your name and current logon.
- A support team worker will receive the request and contact you and/or your leader to confirm access requirements.



## One of my gadgets/lists is missing

Users often remove a list by mistake when they click the white **X** on the tab;

- Click on Perspectives (top left of page).
- Click on my gadgets.
- Click on the gadget that is missing.

A checkmark will appear indicating that the gadget has been added to the perspective.

## I am missing a column

- Click on **List Properties** icon (blue cube, next to last column on the left).
- Click on **Configure List Columns**.
- Locate missing column in the list.
- Add a checkmark beside the missing column.

The column will then appear at the far right of the gadget. Move the column to the appropriate location and then resave your perspective.

## I am missing a patient from my list

- Is there a filter(s) on the **Patient List** (looks like a funnel)?
- If yes; click on the column header where the funnel is to see what is filtered.
- Have the user look for the missing patient room or erroneous filter.
- Ensure all filtered columns have the or radio button (not the And) selected.
- Place a check in the box beside the room number if it is blank.

## I can't see the patients in my step down unit

If you have a separate **Unit** that is part of your floor you will need to create a **Custom Location Favorite**; (see section on Creating Custom Location Favourites above).

## I don't see any attributes in my patient attributes column

First check to make sure you have a **Patient Attributes** column. If not follow the instructions to add a column.

- Patient attributes are added either manually or automatically from orders and registration events. (See section on **Modifying Patient Attributes** above).

## I don't see any patients

Do you have the **Patient List** gadget open?

- If no, click on the **Patient List Gadget**.

Do you have a **Location** selected?

- If no, select a location from the drill down or click on the yellow star, **Favorites** and select your previously created favourite.

## I completed a discharge status update in Capacity Management by mistake

- Highlight the patient name on the patient list.
- Click on the arrow to the left of the room number.
- Click on the **Discharge** icon.
- Select **Cancel Discharge** from the drop-down menu.
- Enter reason for the cancellation in the pop-up window.
- Click **OK**.
- Call the ESW office and cancel the **Discharge Clean**.
- If the patient is still a discharge for today you will need to add the discharge icon (House) for the patient.