

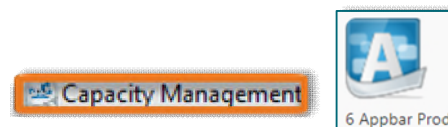
Capacity Management allows a facility to track their patient's flow throughout the organization. Staff have the ability to individualize the layout of Capacity Management to allow for more efficient use of the application.

Capacity Management

Each organization can locate patients in their facility at a quick glance of the Bed Board. Staff can monitor the flow of patients based on transfers and discharges.

➤ Login

- **Capacity Management** can be accessed through the Corner Storefront or from the toolbar within PowerChart or FirstNet.



➤ Dashboard

- Management can look at metrics for bed utilization.

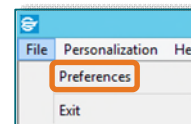
➤ Bed Management

- Assigned staff can review the bed status by unit.
- Gadgets provide a breakdown of lists for patient movement.
- Gadgets also provide information about Custodial and Transport needs.



Preferences

- To open the Preferences menu in CapMan, navigate to the **File** menu and select **Preferences**.



- **Application Tab**
 - **Show Close Confirmation dialog box** - Selecting this option prompts you to confirm each time you close a dialog box.
 - **Allow Automatic Refresh** - Selecting this option allows the system to automatically refresh data.
 - **Refresh Every <min>** - Setting this option allows you to set how often you want the system to refresh.
- **Themes Tab**
 - Users may adjust the font size within the Themes tab.

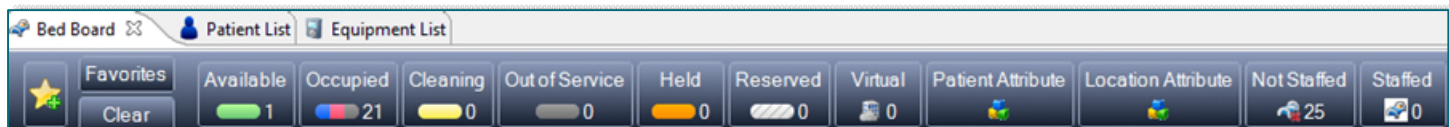
Gadgets

➤ **Bed Board:** The Bed Board gadget supports the following actions:

- Assign a location to a patient.
- Move a patient to another location.
- Unassign a patient from a location.
- Update the status of a bed.
- Reserve a bed for an incoming patient.
- Filter the bed board display.

NOTE: The Bed Board always remembers the last bed location selected in the previous session. Therefore, the most recent selected location will always be in view independent of the filters applied.

➤ **Bed Board Filter Toolbar:** The filter toolbar is used to filter the Bed Board to display the type of beds desired to support the clinical needs of patient placement.

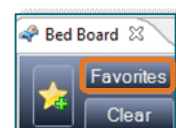


- The Bed Status filters display the color designated to that bed status and a count that indicates the number of bed locations that currently have that status.
- When a bed status is selected, the Bed Board is filtered to display only beds with the selected status. When more than one bed status is selected, the filter acts as an “or” filter, meaning the bed board display filters to display any location with status one **or** status two.
 - **Example:** If Available and Occupied filters are selected, the Bed Board filters to display all beds with a bed status that equals available *or* occupied.

➤ **Location Attributes:** A Location Attribute indicates what type of patient is supported by the location.

- Isolation Bed: This designation indicates the location can support a patient with an isolation attribute.








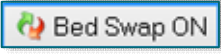
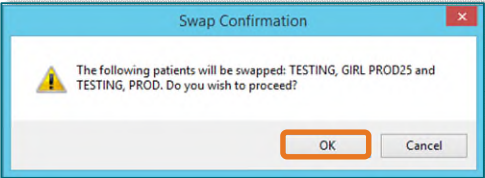


➤ **Filter Favorites:** The favorite buttons allow users to create and save filter selections that are most frequently used.



- To add a favorite, select the bed statuses, reserved state, and location attributes desired for favoriting, and select the yellow star with the add sign. Enter a name for the filter and select **Save**.
- View saved favorites by selecting the yellow star.

Actions Toolbar

The Actions Toolbar is made up of a Local Patient Search list, various actionable icons, summary and detailed view, and the Global Search.

- **Local Patient Search:** Enter a name into the Local Patient Search field, as letters are entered, the list is expanded, and the first patient that matches the characters entered is highlighted in the list. If a patient's name is selected, the bed board accesses that patient's current assigned location, and the bed token flashes to draw focus.
- **Launch PowerChart** : This icon will open the selected patient's chart in PowerChart.
- **Modify Patient Attributes** : This icon allows users to modify patient attributes.
- **Transport** : This icon allows users to request an Adhoc patient or equipment transport, or to cancel or modify a transport that has been requested.
- **Transfer Patient Icon** : This icon allows users to move the patient to the Transfer List gadget or Assign Location - Select Assign Location to assign a transfer location for the patient.
- **Clean** : This icon allows the user to request an Adhoc clean or to cancel a cleaning request if one has been requested.
- **Discharge** : This icon will allow the user to begin the discharge process for the selected patient.
- **Bed Swap** : The Bed Swap icon allows users to swap bed locations between patients.
 - To swap patient locations, select patient one desired to swap from the Bed Board gadget.
 - Click the Bed Swap button in the toolbar. Verify the **Bed Swap ON** button is expanded. 
 - Drag and drop patient one to the current bed location of patient two. Select **OK** when the Swap Confirmation window displays. 
 - Refresh the perspective to view swapped patient locations. 
- **Summary and Detailed View**
 - **Summary:** When Summary View is selected, the Bed Board will display availability status and bed number. Selecting a bed will display the patient's name if the bed is occupied. 

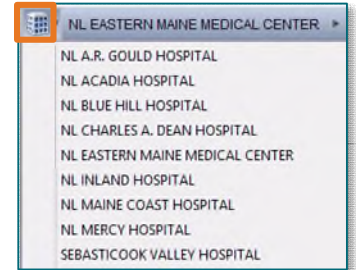
- **Detailed:** When Detailed View is selected, the Bed Board is expanded to show location and patient attributes, when applicable.
- **Global Search:** Allows the user to search for a patient based on multiple search criteria. The following parameters are listed in the Global Search Patient Parameters dialog box:
 - Patient Name
 - MRN
 - FIN

Updating Perspectives

The first-time end users log into the Capacity Management, they need to choose their facility, set favorites, update gadget lists, and organize.

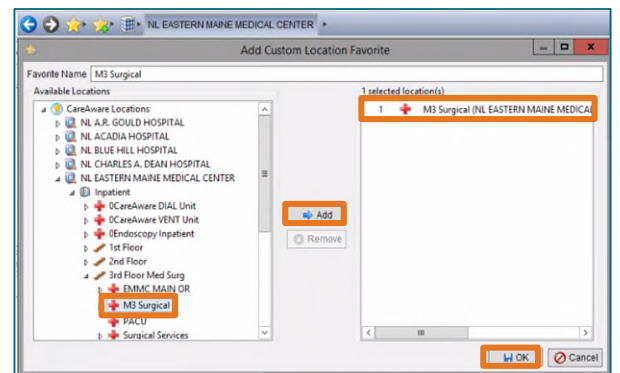
➤ Building Icon

- Click the drop down of the **Building** icon to reveal the list of facilities.
 - Click the facility where employed.
 - Unit staff should use the right facing arrows to specify their unit.



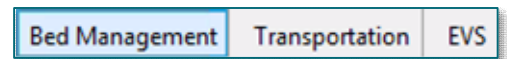
➤ Saving Favorite Locations

- Staff who float to multiple units can save favorites to easily find each unit.
 - Click the **Yellow Star** icon with the +.
 - Select **Add Custom Location Favorite**.
 - Name the list.
 - Expand the site to locate the unit.
 - Add to the location window and click **OK**.



➤ Perspectives

- The perspective buttons are at the top of the screen.
 - Click **Personalization** → **Manage Perspectives** → **My Perspective Configuration**.
 - Highlight the perspectives not needed and move to the left.



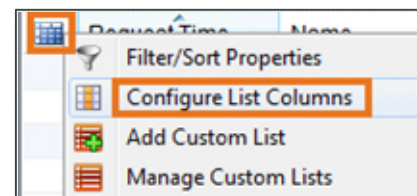
➤ Organizing the Layout

- The location of each list can be modified for the end user to process the information more easily.
 - Left-click and hold the name of the list, then drag the list to the desired location. There will be green lines showing where the list will land.
 - Release the mouse button to drop the list.

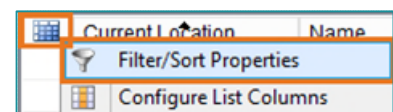


➤ Configuring List Columns

- Within each list, the columns can be adjusted to show relevant information that can also be reorganized per end user's preference.
 - Click the **Table** icon.
 - Click **Configure List Columns**.
 - Place a checkmark in the box of the columns desired to have in view.
 - Remove checkmarks for those details not pertinent and close the window.
 - Once all the columns have been selected, left click, then hold and drag to the right or left to reorganize where each column appears in the view. A blue line will be the guide for where the column will move.



- Additionally, end users can Filter/Sort lists based on specific data.
 - Click the **Table** icon.
 - Click **Filter/Sort Properties** and arrows will appear on each column.



➤ Saving New Perspectives

- It is important to **Save** after personalizing the perspective to avoid losing changes.
 - Click the **Disk** icon and name the Perspective.
 - It is encouraged to include the default perspective (e.g., House Supervisor/Bed Management or Unit Coordinator/RN) in the name for tracking purposes.

