

From the Office of Clinical Informatics Quick Reference Guide (QRG) Capacity Management – Complete Environmental Services Tasks February 25, 2022

This Quick Reference Guide (QRG) reviews how to complete Environmental Services Tasks in Capacity Management.

Common Buttons and Icons:

4.	Clean icon
1	Manage Recurrence icon
	Table icon (List Properties icon)
	Ellipses icon
>>	Right Arrow icon
8	Clock icon (On Break Status)
(D	Silverware icon (On Lunch Status)
0	Green Circle icon (Available Status)
۲	Red Circle icon (Off Shift Status)
Add	Add button
3 Remove	Remove button

Complete Environmental Services Tasks:

Change the Priority of a Job

- From the Custodial Services List gadget:
- **<u>STEP 1</u>**: Within the appropriate row on the **Custodial Services List**, click the **Priority field**.
- **<u>STEP 2</u>**: Select the appropriate priority from the drop-down list; then press [Enter].

Assign a Specific Tecnician to a Job

- > From the Custodial Services List gadget:
- **<u>STEP 1</u>**: Within the appropriate row on the **Custodial Services List**, click the **Custodian field**.
- **<u>STEP 2</u>**: Click the **Ellipses** icon.
- **<u>STEP 3</u>**: Select the appropriate person's name from the **Available Personnel** pane.
- **<u>NOTE</u>**: Select the Filter Personnel by Zone Assignment(s) check box to sort the list of available personnel according to their assigned zones.
- **<u>STEP 4</u>**: Click the **Right Arrow** icon to add the person's name to the **Selected Personnel** pane.
- STEP 5: Click OK.

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Update a Zone Assignment

From the Custodian Status List gadget:

- **<u>STEP 1</u>**: Within the appropriate row on the **Custodian Status List**, click the **Assigned Zones** cell.
- **<u>STEP 2</u>**: Click the **Ellipses** icon.
- **<u>STEP 3</u>**: Select the appropriate zone within the **Available Zones** pane.
- **<u>NOTE</u>**: Zones from multiple facilities may display. Make sure you only select zones at your facility.
- **<u>STEP 4:</u>** Click the **Add** button.

NOTE:

- You can select more than one zone if appropriate.
- To remove a selected zone, click the zone in the Selected Zones pane; then click the Remove button.
- STEP 5: Click OK.

For questions regarding process and/or policies, please contact your unit's Clinical Educator or Clinical Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.