

# A Guide to Capacity Management

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#### WHAT IS CAPACITY MANAGEMENT?

Capacity Management, also known as Cap Man, is an umbrella term for the following three tools:

#### 1. CareAware (CapMan/Bedboard)

This is the tool that is used to monitor and manage bed assignments.

#### 2. CareView Discharge Progression Board

The CareView Dashboard is an interactive visual management tool used during discharge progression huddles to identify barriers to discharge.

#### 3. Command Centre

The Command Centre Dashboard is an interactive visual management tool that provides an one screen summary of patient data from across various platforms including CareAware and PowerChart.

Capacity Management is the primary application for patient flow. It displays the bed utilization of all inpatient areas, the bed status, pending transfers, discharges and more.

Capacity Management enables tracking, managing, and optimizing the flow and alignment of people and resources throughout our organizations.

It allows us to use one application instead of multiple like we do now.

**Example:** if we assign an ED patient a bed it will automatically populate on the ED Tracker with the current availability of that bed (Occupied, Dirty, Being Cleaned, Available).

#### FOUNDATIONAL TERMINOLOGY

**Gadgets** – the tabs you will see at the top of the application such as the Transfer List, the Discharge List, and the Patient List. The displayed gadgets can be personalized based on individual needs. Access to each gadget will be limited depending on the user's role.

**Hamburger Menu** - this is the menu to the left of a patient's name on a list that opens more options

**Patient Attributes** – are icons that appear on the bed board to inform staff of certain details related to a patient such as Isolation status, Level of Care, Falls Risk etc.

**Location Attributes** – are icons that appear on the bed board that relate to that specific room such as Negative Pressure Room, No Bathroom.

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#### Example of the Patient List and Bedboard

Patient List 224 All Patien	ts 217 AL	3 Transfers 7 Isolatio	n 29 Off									and the second second			
bent			4.	2.							🔍 Global Search	Bed Utilization 414/1031	124 days, 15 hours	Ins 0	Location Care Jobs ( 0 Adhoc 0
Current Location	Statu	Name	Age	Gender	Admitting Physician	LOS	EIN	Patient Attributes	MRN	Anticipated Discharg	Encounter Milestones Trar A	····		Out: 7	Discharge Clears 0
SC2A08, A	Occu	ROADSHOWLIVE, M.	30 y_	Female		107 20:42	22001468	MH	11001255	9/7/24 12:00 AM				_	Transfer Clean: 0
SC2A19, A	Occu.	SYSTEMTESTIMH, S	37 y_	Female	Sandhu, Navdeep	310 03:23	22004715	MHOR	11053597	9/5/24 12:00 AM	<b>A</b>				mansier clean.
SC4A99, D	Occu	ZZINA, MACKENZIE	31 y_	Female	Cerner Test, Physici	52 04:48	22003358	<b>10</b>	11002916	7/20/24 12:00 AM		Custodial Jobs ( 0 )	Transport Jobs (2)	Discharges (12)	
SC3A03, 3C	Occu	ZZTEST, INPATIENT	34 y_	Female	Tam, Benjamin Ho	407 23:58	22000013	wes	11000013	6/27/24 10:00 AM		and the second sec			
SC3402, 2A	Occu	ZZTESTPATIENT, IN	45 y_	Female	Vucasovich, Barbara	170 21:36	22001426	R1	11001204	6/26/24 12:00 AM		Adhoc 0	Patient (Adhoc): 2	Pending: 10	
SC4408, A	Occu	ZZTEST, INI MEDSU.	72 y_	Male	NHS Test01, Physici	302 03:02	22000577	ICU	11000339	6/13/24 8:22 AM		Discharge Clean: 0	Transfer: 0	Confirmed: 1	
SC4A14, A SC4A01, 1C	Occu	ZZINA, WSCLOONE ZZINA, UNITTESTIVI.	31 y 7 m	Female	Cerner Test, Physici Cerner Test, Physici	192 12:23 214 02:46	22000322 22000218		11000925 11000703	6/3/24 12:00 AM 4/19/24 3:31 PM			Automatica and	ALCONTRACT AND ALCONTRACTOR	
SC4401, 10 SC4403, 38	Occu.	ZZINA, UNITTESTIVI.	57 v_	Female	NHS Test01. Physici	214 02 46	22000218		11000703	4/19/24 3:31 PM		Transfer Clean: 0	Discharge: 0	Departed Patients: 1	
SC2E09.A	Occu	SYSTEMTEST, INIO	44 V_	Male	NHS Test01, Physici	190 22:19	22001200	KU	11000949	4/14/24 11:00 AM	2	Room Clean: 0	Round Trip: 0		
SC5A01, 1B	Occu	INI ONE, WSSEVEN	24 1	Female	NHS Test03, Physici	195 22:01	22001135		11000874	2/29/24 12:00 AM	-				
SC3805, A	Occu	ZZTEST, MEDRECT.	23 %_	Female		345 01:51	22000365		11000243	10/5/23 12:00 AM			Round Trip Return: 0		
SC2A25, A	Occu	ZZTESTWOMENBA	5 m_	Male		165 05:54	22000573	18	11001271				Equipment (Adhoc): 0		
SC2B24.A	Occu.	PAOTEST, SCEDAD	39 y	Male	Cerner Test, Nurse	10 21 28	22004448	CEU	11053433	Datio	ent List ,				
002024,4	-		12							Paul	STIC LISC ,				
					• • • • •		*******			Palle					
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ent BARTESTTHREE	stepDow	Coupled Duty CH 2 203 0 0 0	Decs 2A M	edical Pod B	Autof Service Held	Reserved 2	Patient Atribute	iny Pa 60% ) SCS 28	Bec	board	> 3% 5) SCS 28 KU Intern75% 5			7% > SCS 2D HIU Fier	Unit 7% SCS 2D PA
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End Beard 12 Parothis Auto Clear Clear ent. BARTESTTHREE 2A Acute Stroke UnitS 0.4 0.0 C.0 1: Out 3 why Beds	ISTEPDOW STEPDOW 25 SCS 2A A & 8 O, Rovel 0 Priority	Copied Drify Cli 203 0 0 0 N Medical Pod A130% > 13 D. D.C. 0 Dub 5	CS 2A M A: 10-10 Ravel 0 Ou	edical Pod E	Dut of Service         Held           0         0           2*         3*           3*         3*           3*         5*           3*         5*           3*         5*           3*         5*           3*         5*           3*         5*           3*         5*           5* <td>Reserved error 2 R= 100% 2</td> <td>Patient Athlbute</td> <td>ry Pa 50% &gt; SCS 28 A: 0 O: Ravet 0</td> <td>Bec accu ând. SSN 70.000 Out 1 vBrds</td> <td>3 board</td> <td>5 35. ) SCS 28 KU Intern</td> <td>A: 30: 3D: 00: 0 Rsvd: 00ut: 1 Priority Beds</td> <td>A: 19 O: 10 D: 0 C: 0 Rovd: 1 Out: 1 Priority Beds</td> <td>7% &gt; SCS 2D HIU Flex A: 15 0: 1 D: 0 C: Rout: 0 Out: 0 Priority Beds</td> <td>Unit 7% SCS 2D PA 0 A: 17 O: 2 Ravd: 0 Ou B Ptiority Be</td>	Reserved error 2 R= 100% 2	Patient Athlbute	ry Pa 50% > SCS 28 A: 0 O: Ravet 0	Bec accu ând. SSN 70.000 Out 1 vBrds	3 board	5 35. ) SCS 28 KU Intern	A: 30: 3D: 00: 0 Rsvd: 00ut: 1 Priority Beds	A: 19 O: 10 D: 0 C: 0 Rovd: 1 Out: 1 Priority Beds	7% > SCS 2D HIU Flex A: 15 0: 1 D: 0 C: Rout: 0 Out: 0 Priority Beds	Unit 7% SCS 2D PA 0 A: 17 O: 2 Ravd: 0 Ou B Ptiority Be
Ped Beard 12 Faorites Clear Clear Acute Stroke UnitS or A D OL: 0 11 Out 3 rky Bedt SC2A12, A	stepDow stepDow stepDow scs 2A & 8 0: 1 Rod 0 Priority A = 50	N Coupled Dirty Cl 203 N Modical Pool A130%  Cu 5 Cu	SCS 2A M A: 10: 10 Ray d: 00, Priority B: 0c SC2	edical Pod B k0C:0 it 0 eds	At of Service Held	Reserved error 2 R= 100% 2	SCS 2A Telemet A 10: 6D: 0C: 1 Rivel: 0 Out: 0	iny Pac. 60% () SCS 28 A: 0 0 B Priority A () C S	Bec	SC3 28 KU Infe         1           SC3 28 KU Infe         1           A 00.8 D.40.0         80.0 D.40.0           By Priority Beds         Coll Sc22801, A	3% () SCS 28 KU infere	A: 30: 30: 00: 0 Ravd: 0 Out 1 Priority Beds	A: 19 O: 10 D: 0 C: 0 Ravd: 1 Out: 1	7% > SCS 2D HIU Rex A: 15 0: 1 D: 0 C: Rive: 0 Out: 0 Priority Beck	Unit 7% SCS 2D PA 4: 17 0: 2 Ravd: 0 Ou Priority Be A B SC22
Paraman en Bed Beard 12 Cearr BARTESTINREE 22 Acute Stroke UnitS 0:4 0:0 0:0 10 0:4 2 Wy Beds SC2A12, A SC2A12, A	STEPDOW SSTEPDOW SSTEPDOW SSTEPDOW SSCS 2A A - 80 ( Rout 0 Priority A - 50 () SSC SSC 2A SSCS 2A SSCS 2A A - 50 ( ) SSCS 2A SSCS 2A SS	Coopied         Dety         Clip           203         0         0           N         N         N           Medical Pool A130%         0         0           201         0         0         0           N         N         N         N           Medical Pool A130%         0         0         0           201         0         0         0         0           201         0         0         0         0	CS 2A M A: 10-10 Ravel 0 Ou	edical Pod B k0C:0 it 0 eds	At of Sensore Held 0 0 0 0 0 0 0 0 0 0 0 0 0	Reserved error 2 R= 100% 2	Patient Athibude	iny Pau_60% () SCS 28 At 0.0: Revid 0 Priority A COC 0	Bec (CC) GridSSK 70:00:0 (CC) GridSSK 70:00:0 (CC)	Sc3 28 ICU Me. 13     A 0.0 8.0 4C1     More Sc1 28 ICU     More Sc1 28 ICU     Sc2 28 ICU Me.     Tointy Bed     Sc2 280.4     Sc2 280.4	3 5 5 5 5 5 5 5 5 5 5 5 5 5	A 30 30:00:0 Ravd: 0 Out 1 Priority Beds A • Sc2815, A Oc Sc2816, A	A: 19 O: 10 D: 0 C: 0 Revet 1 Out: 1 Friority Beds A = SC2D02, 01 B = SC2D02,	7% >         SCS 2D HIU Pees           A: 15 0: 1D. 0 C:         Reid: 0 Out 0           Priority Beds         A           A: SC2001, 01         A	Unit 25(3) SCS 2D PA 4 170-21 Rordt 000 Priority Be 0c SC22 0c SC22
And	statle O 189 STEPDOW 25 SCS 2A A 8 O 1 Rovel 0 Priority A 50 SCS 2A A 8 O 1 Rovel 0	Corplext         Dirty         Chi           2023         0         0         0           N         0         0         0           Medical Pod A130%         5         0         0           Duty         5         0         0         0           Statistical Pod A130%         5         0         0         0           Statistical Pod A130%         5         0         0         0         0           Statistical Pod A130%         5         0	SCS 2A M A: 10: 10 Ray d: 00, Priority B: 0c SC2	edical Pod B k0C:0 it 0 eds	At of Service         Held           0         0           5*         5*           1         3%           SCS 2A Telementy At 10.9 D 00:0 Rout 00x83           Priority Beds           0         522.87.4 00:522.87.4 00:522.87.4	Resented (2) (2) (2) (2) (2) (3) (3) (4) (4) (4) (4) (4) (4) (4) (4	Patent Athibude	iny Paulonia > SCS 28 0 Altonia + Altonia Altonia Blackania Blackania	Bec	SG 28 KU Infe         3           \$ SG 28 KU Infe         3           \$ Infe         3	5 5(5) 5(5) 2(10) (44-ma, 75% ) A (2) 6(5) 6(10) Fred (2) (4, 1) (5) 6(2) (5) (4) (6) 6(2) (5) (4) (7) (4) (4) (4) (7) (4) (4) (4) (7) (4) (4) (4) (4) (7) (4) (4) (4) (4) (7) (4) (4) (4) (4) (7) (4) (4) (4) (4) (4) (7) (4) (4) (4) (4) (4) (4) (4) (4) (4) (4	A: 3 O: 3 D: 0C: 0 Revel: 0 Out: 1 Priority Beds A = SC2B15, A Oct. SC2B15, A A = SC2B15, A A = SC2B17, A	A: 19 O: 10 D: 0 C: 0 Ravd: 1 Out: 1 Friority Beds A • SC2002, 01 B • SC2002, 03	SCS 2D HIU Fee     A: 15 0: 1D: 0 C:     Rvd: 0 Out: 0     Priority Beds     A ≪ 5C2001, 01     A ≪ 5C2001, 02     B ≪ 5C2001,	Unit 1%) 5 (5 20 PM 4 17 0 2 Rod 000 Friority B 6 (5 22) Block
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Parties of the second s	stable O 199 STEPDOW STEPDOW 75 SCS 2A A & SO: Roud: 0 Priority A = SO 0 S SCS 2A A & SO: A &	Autorical Pool A130%         P           Visit         B to C to D           Medical Pool A130%         P           B to C to D         D           CAU         A           CAU         IA           CAU         IA	SCS 2A M A: 10: 10 Ray d: 00, Priority B: 0c SC2	edical Pod B k0C:0 it 0 eds	At of Service         Held           0         0           2*         2*           1 25         52 24 Telement At 10 3D 000 3           2*         2*           1 25         52 24 Telement At 10 3D 000 3           2*         100 5 200 000           3*         100 5 22016 At 00 5522018 At 00 5522018 At 00 5522018 At 00 5522018 At 00 5522018 At	Resented (2) (2) (2) (2) (2) (3) (3) (4) (4) (4) (4) (4) (4) (4) (4	Patient Attribute SCS 2A Telemet A 1 0.6 0.0 0.0 Priority Beds Oc. SC2A25.A S SC2A27.A S SC2A27.A S SC2A27.A	ry Pa_60% () SCS 28 A 0 0. Ry dia Block Block Block Cos 2 Block Cos 2 Cos 2 Co	Bec COLO Conta	SG28 KU Inter-13 A 00.8 D Inter-13 A 00.8 D Inter-13 Root 9 D	SS 28 (C) Intern	A. 3 O. 3 D. 0 C. 0 Rivel: 0 Out: 1 Priority Beds (A * 5C2815, A (O \$C2816, A (A * 5C2817, A (O \$C2818, BA, # (A * 5C2817, A) (A * 5C2817, A)	A: 19 O: 10 D: 0 C: 0 Red: 1 Out: 1 Friority Bed: A = 5c2002, 01 S = 5c2002, 01 C = 5c2002, 04 A = 5c2002, 04 A = 5c2002, 05	7%         SCS 2D HIU Flex           A: 15 0: 1D to C:         Rovet 0 Out 0           Priority Beds         A           A         SC2001, 01           A         SC2001, 02           B         SC2001, 02           A         SC2001, 02           C         SC2001, 02           C         SC2001, 02	Unit 2% > SCS 2D PM 0 A: 170-21 Rord: 0.00 B Pitority Be 0 C SC21 Block
Bel Beerd 12 Parothes Clear: And Clear:	Alastie Oo 189 STEPDOW STEPDOW S SCS 2A A & SO 1 Roud: O Priority A & SO 0 S SCS 2A A & SO 2 A & SO 2 S SCS 2A A & SO 1 S SCS 2A S SCS 2A S SCS 2A A & SO 1 S SCS 2A S SCS SCS 2A S SCS 2A S SCS	Image: Second	SCS 2A M A: 10: 10 Ray d: 00, Priority B: 0c SC2	edical Pod B k0C:0 it 0 eds	Att of Service         Held           0         0           0         0           2*         2*           375         SCS 2A Telementry Rad 00 db 3           Piorty Reds         0           05         SC2A18, A           05         SC2A18, A           05         SC2A18, A           05         SC2A18, A	Reserved (2) (2) (2) (2) (2) (3) (3) (4) (4) (4) (4) (4) (4) (4) (4	Patient Attribute SCS 2A Telement A 10: 6D: 0 C: Randi 0 Cut: 0 Priority Beds Co: SC2A25, A Co: SC2A25, A B = SC2A27, A B = SC2A27, A	iny Paul 60% - ) SCS 28 A : 0 : 0 Revel 0 Block	Bec (CCU Grat. 88% 70.00:0 (C2019.A (C2019	Sc3 28 KU Intel     S	35: 5)         SCS 28 (CU inferen	A: 3 O: 3 D: 0C: 0 Revel: 0 Out: 1 Priority Beds A • SC2B15, A Oct. SC2B16, A A • SC2B17, A Oct. SC2B17, A Oct. SC2B18	A: 19 O: 10 D: 0 C: 0 Ravd: 1 Out: 1 Friority Beds A = SC2002, 01 B = SC2002, 03 Oc. SC2002, 04	7% >         SCS 2D HIU Field           A: 150.1 D 0 C:         Rovel 0 Out 0           Priority Beds         A           A: SC2001, 01         E= SC2001, 01           A= SC2001, 02         E= SC2001, 02	Unit: 7% > SCS 2D PP 0 A: 17 0: 2 Rord: 0 Ou B Priority Br 0 C Sc2 Block

#### ACCESSING CAPACITY MANAGEMENT

Depending on your role, you will access capacity management via the icon on your desktop or by launching it from PowerChart.





CapMan

#### **PowerChart Icon**



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Login Screen



#### CUSTOMIZING YOUR VIEW IN CAPMAN

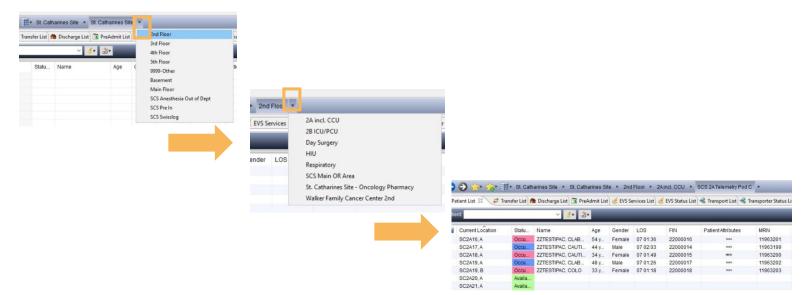
When you first login to CapMan, you will want to select your location. You only need to do this on your first login. Start by selecting your site:



This will display all information for the site that has been selected.

#### **DISPLAYING A UNIT**

Depending on your role, you may want to filter even further by displaying just the unit or pod you work on. To do this, continuing clicking on the arrow to the right until you're satisfied with your view.



Hotel Dieu

Shaver

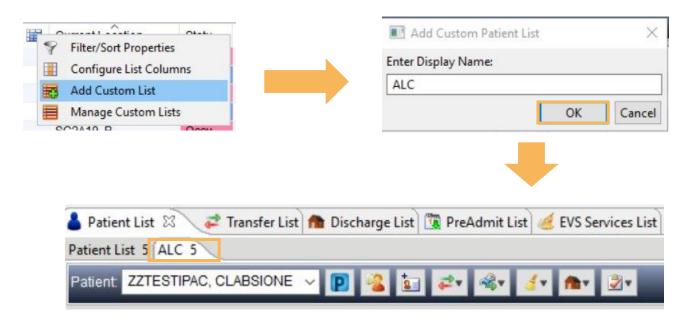
5



#### **CREATING A CUSTOM LIST**

You can create your own tabs that can display patients fitting certain criteria. For example, creating a custom list of all ALC patients on your unit.

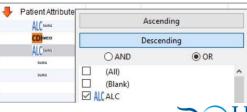
- 1. Start by clicking on the spreadsheet icon in the top-left of the patient list 🕮
- 2. Select "Add Custom List" and enter create a name for your custom list. This will create a new tab.



#### FILTERING THE CUSTOM LIST

Once your list is created, you can add your desired filter.

- 1. Start by clicking on the spreadsheet icon in the top-left of the patient list
- 2. Select "Filter/Sort Properties" to turn on the ability to filter a column.
- 3. Click on the "**Patient Attributes**" column and select only ALC.



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## Filter/Sort Properties Configure List Columns Add Custom List Manage Custom Lists





#### EXAMPLE OF A FILTERED CUSTOM LIST

This is the patient list for 2A pod C, showing only ALC patients.

S Pa	stient List 🕺 🦨 Tran	sfer List 👖	🖿 Discharge List 🚺 Pre	Admit List	🥑 EVS Se	rvices List 🤞	EVS Status List	🔏 Transport List 🔏 Tra	nsporter Status	List 📓 Equipment List 🤞	Floor Plan 🌆 Metrics		ť
Patie	nt List 5 ALC 2												
Patie	ant ZZTESTIPAC, CLAB	sione ~	🖻 省 🖬 🛹		fr fftr	2.							Slobal Search
iii		▼ S.,	🗢 Name	<b>▼</b> A	₩ G.,	👻 LOS	₩ FIN	S Patient Attributes	₩ MRN	➡ Transport (Last			
	SC2A19, A	Occu	ZZTESTIPAC, CLAB	48 y	Male	07 01:51	22000017	ALCOMO	11963202		7		
۲	SC2A16, A	Occu	ZZTESTIPAC, CLAB	54 y	Female	07 02:02	22000016	ALCINES	11963201		2 <b>m</b>		

#### CUSTOMIZING YOUR VIEW

You also can move around your Gadgets (tabs) to be above, below, together or split the screens.

🖗 Bed Board 🖾			💧 Patie 🕴 🧳 Trans 1	🖿 Disch 🚺	PreA 🤞 EVS 🛛 🤞 EVS	🗋 📽 Tra	ans 🔏 Tra	ns) 📑 Equi 🗎	Ca Floor
		Service Held	ALC 2 Discharge 2 Patien						
Clear Reserved P:	itient Attribute		Patient	Ý	<u>d</u> • 2•	_	_	<u></u>	Global Search
			Current Location	Statu	Name	Age	Gender	LOS	FIN
Patient	🗸 🛃 😨 🏘 Staffed Beds Summary	🏢 🔍 Global Search	SC2A16, A	Occu	ZZTESTIPAC, CLAB	54 y	Female	07 02:08	22000016
			SC2A17, A	Occu	ZZTESTIPAC, CAUTI	44 y	Male	07 02:34	22000014
	<b>^</b>		SC2A18, A	Occu	ZZTESTIPAC, CAUTI	34 y	Female	07 02:20	22000015
CS 2A Telemetry Pod C		56%	SC2A19,A	Occu	ZZTESTIPAC, CLAB	48 y	Male	07 01:57	22000017
: 5 O: 5 D: 0 C: 0 svd: 0 Out: 7			SC2A19, B SC2A20, A	Occu Availa	ZZTESTIPAC, COLO	33 y	Female	07 01:50	22000018
sva. o ode 7			SC2A20, A	Availa					
riority Beds			SC2A21, A SC2A22, A	Availa					
			SC2A23, A	Availa					
SC2A24, A	Oc SC2A19, B	fin 🦨	SC2A24, A	Availa					
SC2A23, A	SC2A19, A	2							
A <b>T</b>	ALC 🛌 📖								
SC2A22, A	SC2A18, A	#							
AV SCERE, A	Oc	-							
	COI web								
SC2A21, A	Oc SC2A17, A	4							
	and and								
SC2A20, A	SC2A16, A	🏫 🧭							
	ALC and		c						





In any of the tabs you are easily able to move around the columns to your preferences.

Patie	int.	~	<u>∢</u> • <u>≯</u> •						
	Current Location	Statu	Name	Age	Gender	LOS	Patient Attributes	Transport (Last Com	Encounter Milestones
	SC2A16, A	Occu	ZZTESTIPAC, CLAB	54 y	Female	07 02:17	ALCSURG		<b>#</b> fft
	SC2A17, A	Occu	ZZTESTIPAC, CAUTI	44 y	Male	07 02:43	SURG		7
	SC2A18, A	Occu	ZZTESTIPAC, CAUTI	34 y	Female	07 02:29	COIMED		7
	SC2A19, A	Occu	ZZTESTIPAC, CLAB	48 y	Male	07 02:07	ALCOURG		7
	SC2A19, B	Occu	ZZTESTIPAC, COLO	33 y	Female	07 01:59	SURG		# <b>f</b>
	SC2A20, A	Availa							
	000104 4	August							

m	Current Location	Statu	Name	Age	Gender	LOS	Patient Attributes	Isolation	Attending Physician (	Encounter Milestones	F
	SC2A16, A	Occu	ZZTESTIPAC, CLAB	54 y	Female	07 02:17	ALCOURS	hiu curi cales a age	2	2 <b>m</b>	:
	SC2A17, A	Occu	ZZTESTIPAC, CAUTI	44 y	Male	07 02:43	SURG			<b>#</b>	:
	SC2A18, A	Occu	ZZTESTIPAC, CAUTI	34 y	Female	07 02:29	CDIMED	Clostridioides difficle		7	:
	SC2A19, A	Occu	ZZTESTIPAC, CLAB	48 y	Male	07 02:07	ALCours			<b>#</b>	:
	SC2A19, B	Occu	ZZTESTIPAC, COLO	33 y	Female	07 01:59	SURG			<b>#m</b>	:
	SC2A20, A	Availa									

CV

#### BED FLOW AND VIEWING BED STATUS

There are a few statuses a bed can be:

A green "A" means the bed is clean and ready for a patient.

A **yellow** "C" means the bed is being cleaned.

A **brown** "D" means the bed is dirty and the broom icon tells you a clean request is in.

A grey "O" means the bed is out of service.

A **black** "B" means the bed is blocked.

An **orange** "H" means that bed is held for a patient. This is used when a patient is going to another NH site for treatment, but returning to their original bed.

н

A **blue/pink/grey** "OC" means the bed is occupied.



SC2A22, A

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#### BED FLOW: ASSIGNING AND TRANSFERRING A PATIENT

Only **Bed Monitors** will assign a patient to an appropriate bed by dragging their name from the transfer list to an open bed on the bed board.

Patie	nt	~		_	_		Clear Reserved Patient A		
	Name ZZTESTIPAC, HYST ZZTESTIPAC, COLO	Gender Male Female	Age 39 y 33 y	Current Location SC2B01, A SC2A19, B	Destination	Comment Intensive Car Surgical Ward	Patient V		Staffed Beds Summary 🔢 🔍 Global Search
	ZZTESTIPAC, CLAB	Male	48 y	SC2A19, A		Surgical Ware			s (
	ZZTESTIPAC, CAUTI	Male	44 y	SC2A17, A		Surgical Ware	SCS 5A General Surgery Pod A	0% )	SCS 5A General Surgery Pod B 0%
	ZZTESTIPAC, CLAB	Female	54 y	<u>SC2A16, A</u>		Surgical Ware	A: 23 O: 0 D: 0 C: 0 Rsvd: 0 Out: 0		A: 7 0: 0 D: 0 C: 0 Rsvd: 0 Out: 0
							Priority Beds	3	Priority Beds
							A SCSA01, 1A		A SC5A09, A A SC5A09, B

Once assigned, the destination column on the transfer list will update with the assigned bed and the bed pill on the bed board will have lines across it to indicate that it has be targeted for a new patient.

	Name	Gender	Age	Current Location	Destination	Comment	
	ZZTESTIPAC, HYST	Male	39 y	SC2B01, A	_	Intensive Car	Patient: 🗸 🛃 🐉
۲	ZZTESTIPAC, COLO	Female	33 y	SC2A19, B	SC5A01, 1A	Surgical Ware	
	ZZTESTIPAC, CLAB	Male	48 y	SC2A19, A		Surgical Ware	
	ZZTESTIPAC, CAUTI	Male	44 y	SC2A17, A		Surgical Ware	SCS 5A General Surgery Pod A 0% >
	ZZTESTIPAC, CLAB	Female	54 y	SC2A16, A		Surgical Ware	A: 23 O: 0 D: 0 C: 0
							Rsvd: 1 Out: 0
							Priority Beds 📑
							A V SC5A01, 1A

Double click on the bed pill to open the assignment window to confirm the reserved patient's details.

urrent Reserved Patient				
ZZTESTIPAC, COLO Current Location: SC2A19, B Diagnosis:	Female	33 years	Birth Date: 3/3/91 MRN: 11963203 FIN: 22000018 Attending Physician: TEST, PROVIDER INTERFACE	
Patient Attributes				
Surgical Ward (Order-398559481)				
Location Attributes				
Funded Vear No	ursing Station 🗹 Wa	ard		
omment:				
omment:				
<del>Z</del> .			OF	<





If the patient is moved using a porter, then the transfer will be complete when the porter finishes the job on their mobile device. The patient will fall off the transfer list when complete.

For transfers that do not involve a porter, **sending unit** manually completes the transfer by clicking the hamburger menu to the left of the patient's name and selecting "**Transfer>Complete Transfer**"

Nar	me	Gender	Age	Current Location	Destination
ZZT	ESTIPAC, HYST	Male	39 у	SC2B01, A	
P 3	Launch Powercha Modify Patient At Assign Badge		y y y v	<u>SC2A19, B</u> <u>SC2A19, A</u> <u>SC2A17, A</u> SC2A16, A	SC5A01, 1A
#	Transfer		> Ø	Cancel Transfer	
	Transfer to Virtual	Location	a P	Request Bed Assignme	
			5	Unrequest Bed Assignr	ment
				Dispatch Transport Wh	en Bed Is Available
			2	Modify Transfer	
			5	Unreserve Destination	
			Q.	Modify Transport	
				Return Patient To Held	Location
			Ø	Release Hold on Locati	ion
			<b>~</b>	Complete Transfer	

#### **REQUESTING A PORTER**

Start with Connexall

#### Requester (DI – Tech, OR RN/Clerk, Hemodialysis or Oncology Staff)

1. Add all necessary appointment needs in patient Power Chart (example: sling, stretcher, etc.)

2. Open Connexall DAC and request patient transport.	select the <b>Transport Prep Request</b>	Transport Prep Request	icon to
3. Search for patient and click <b>OK.</b>	Select SCS Patient Search Text Matching Custom Data Records		

4. The requester will need to remove manually once appointment complete.







Checking for Connexall Alerts Requesting Patients on the Desktop DAC, or WOW

- 1. Open Desktop DAC Transport Prep Request 2024-11-09 12:33:42 3AARm SC3A01 Bed 1A Modality: Dialysis 98:13:24 Requested By: /Ext: 43712 2. Double Click on call and Actions Update Info Acknowledge Acknowledge Options 1 Escalate 3. When the patient is ready to Callback Number go to the appointment (including having reviewed RN/Tech/Clerk requests - e.g. Close sling, stretcher, IV, etc) click Options.
- 4. The Unit Nurse selects Transport Request in CapMan and selects **OK**.

Search Test Transport Requested in CapMan Patient Prep Not Completed Patient Refusing Scheduling Conflict Patient Condition Changed Patient Not Available		
Transport Requested in CapMan Patient Prep Not Completed Patient Refusing Scheduling Conflict Patient Condition Changed	2	
Patient Prep Not Completed Patient Refusing Scheduling Conflict Patient Condition Changed		
Patient Refusing Scheduling Conflict Patient Condition Changed		
Scheduling Conflict Patient Condition Changed		
Patient Condition Changed		
	Scheduling Conflict	
Patient Not Available	Patient Condition Changed	
	Patient Not Available	
OK Cancel		





Checking for Connexall Alerts Requesting Patients on the Vocera Badge

1. Alerts to badge – select appropriate alert





- 2. Open Alert
- 3. Select an option and the call will clear off the badge

After completing one of the options above, you are now ready to move on to Capacity Management (CAPMAN) to request a Patient Transportation Porter.

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#### **REQUESTING A PORTER-TRANSFERS AND TRANSPORT**

For the areas that use Porters (ED, OR and DI), will be using Capman to request these actions to complete transfers and transports.

**Transfers** – are when a patient has been assigned a bed that they are physically moving to and staying in.

**Transports** – are a temporary movement to appointment or a procedure within the same hospital and always involve a porter.

There is a "Transfer List" and "Transport List" tab (gadget) that display active.

Patie	nt:	~	
	Name	Current Location	Destination
	ZZTESTIPAC, CAUTI	SC2A17, A	
	ZZTESTIPAC, CLAB	SC2A16, A	
	ZZTESTIPAC, CLAB	SC2A19, A	
	ZZTESTIPAC, COLO	SC2A19, B	SC5A01, 1A
	ZZTESTIPAC, HYST	SC2B01, A	

Nam	itient List 🛹 T e:	ransfer List	⊊ <u>Ira</u> ∼			-	harge List 🚺 Pre	Admit List	🤞 EVS Services List 🛛
Num	iber of Jobs	Patient:	0	Avg/hr:	0.0	Avera	ge Turn-Around T	ime (MM:SS	S) Average Respo
		Equipment	0	Avg/hr:	0.0		00:00		0
	0 Origin		0 estina		0.0	Priority	00:00 Name	Mc	0 ode of Transport
I	^	D	estina			Priority Routi			





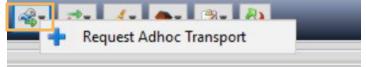
#### **REQUESTING A PORTER-TRANSFER**

To request a porter from the transfer list, use the hamburger menu and select "**Transfer>Dispatch Transport When Bed is Available**". This will send the request to the nearest porter's mobile device when the bed status is "**Available**".

	- 233	<u>SC2A19, B</u>	SC5A01, 1A
P Launch Powerchart	33	<u>SC2A19, A</u>	
Modify Patient Attributes	F)	<u>SC2A17, A</u>	
🦕 Assign Badge	F)	<u>SC2A16, A</u>	
🚅 Transfer	> 0	Cancel Transfer	
Transfer to Virtual Location	dia dia	Request Bed Assignmen	it
	13	Unrequest Bed Assignm	ent
	4	Dispatch Transport Whe	n Bed Is Available
	6	Modify Transfer	
	13	Unreserve Destination	
	1	Modify Transport	
	D	Return Patient To Held I	ocation
	0	) Release Hold on Locatio	n
		Complete Transfer	

#### **REQUESTING A PORTER-TRANSPORT**

To request a porter for temporary transport, find the patient on bed board and select the "**Request** AdHoc Transport" icon.



Fill in destination using the ellipses in the "to" field and selecting the desired location.

ZTESTIPA urrent Location laguosis:			Male	44 years	Birth Date: 8/30/ Attending Physici	30 MRN: 11963199 F an: TEST, PROVIDER	IN: 2200001 INTERFACE
Scheduled Time:							
10/7/24 ↔	6:34 PM	C From	m SC2A17, A		- To		100
Priority	Transporters	Mode of Tra	nsport				
Routine ~	1 🛊	Stretcher	•]				
Patient Attributes							
Acute Respire	atory Infection		Aerosol	generating media	cal procedure		^
Aggressive Te	endencies		Airborn	e/Contact Precaul	tions		
Airborne Prei	autions		ALC				~
Patient Attributes	(Automatic)						
Cl Cornical War	1 (Order-2005	504201					0
Transport Details							
Behavioural f	Restraints	lsolation	IV P	sle	Monitor	🗌 Oxygen	^
RN Required	-	RT Remuired	Can .	Tharne Nurse			۲
						OK	Cancel







When filed, this creates the request which will go to the nearest available porter's mobile device and fall onto the "**Transport List**" gadget.

Nam	etient List 🛹 Ti					_		📱 PreAdmit Lis		
Num	nber of Jobs	Patient:	0	Avg/hr:	0.0	Avera	ge Turn-Aro	und Time (MM:	SS)	Average Resp
	0	Equipment	: 0	Avg/hr:	0.0		00	:00		
	0 Origin		: 0 estina		0.0	Priority	00 Name	T.	Mode of	Transport
	~	D	estina			Priority Routi	Name		Mode of Stretche	1

#### EQUIPMENT TRANSPORT

Capacity Management can also be used to transport equipment. The following is a list of items that can be requested for transport in Capacity Management.

All other requests should follow the current Connexall request process.

Description	Classification Type	Location
Code Blue Crash Cart	SCS Equipment Transprt	SCS MDR
Code Pink Crash Cart	SCS Equipment Transprt	SCS MDR
Code Blue Crash Cart	NFS Equipment Transport	NFS MDR
Code Blue Crash Cart	WS Equipment Transport	WS MDR
Blood Products (MTP)	SCS Equipment Transprt	SCS Blood Blank
Blood Products (Non Urgent)	SCS Equipment Transprt	SCS Blood Blank
TGLN Eyes/Tissue	SCS Equipment Transprt	SCS ER Reg/Lab
Lab Stat	SCS Equipment Transprt	SCS
Lab Routine	SCS Equipment Transprt	SCS
Lab Stat	NFS Equipment Transport	NFS
Lab Routine	NFS Equipment Transport	NFS
CT Contrast	SCS Equipment Transprt	SCS CT
CT Contrast	WS Equipment Transport	WS CT
CT Contrast	NFS Equipment Transport	NFS CT

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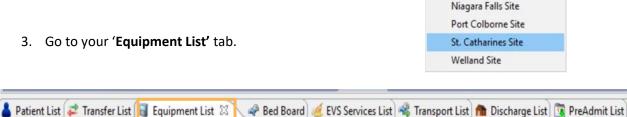


Fort Erie Site

Hotel Dieu Shaver

#### **REQUESTING EQUIPMENT TRANSPORT**

- 1. Log into Capacity Management
- 2. Click on the Building Icon and pick the correct site
- 3. Go to your 'Equipment List' tab.



4. On the Equipment List tab, click on the 'Global Search' button, a 'Global Search Equipment Parameters' window will open, in the 'Description' field type in what is being transported (in this example, lab has been entered) and hit 'Search'.

Description	lab		
classification type	All Equipment Types	~	
Manufacturer			
Leased/Not Leased	BOTH		~
Model Number			
Serial Number			
Asset Control Numbe	r		
Badge ID			

5. Using lab as an example, Lab Routine and Lab Stat will now show on the Equipment List, be sure to pick the correct site

Description	Classification Type
Lab Routine	SCS Equipment Tra
Lab Routine	NFS Equipment Tra
Lab Stat	SCS Equipment Tra
Lab Stat	NFS Equipment Tra

6. Click the arrow to the right of the correct **Description**, scroll to Transport and click on 'Request Adhoc Transport'.

Description			Classification Type	Owning Location	
Deb Bankins			SCS Equipment Tra	St. Catharines Site	
San Assign Badg	2		NES Equinment Tra	Niagara Falls Site	
🔏 Transport	Transport > 💠 Request Adhoc Transport		est Adhoc Transport	t. Catharines Site	
Lab Stat			NFS Equipment Tra	Niagara Falls Site	

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 The create AdHoc Equipment Transport Request window will open. All necessary information including the specifics of where the equipment can be picked up and where it is going.

## HOSPITAL INFORMATION SYSTEM (HIS) Create AdHoc Equipment Transport Request Asset Control Number: Classification Type: SCS Equipment Transport. Serial Number:

A GUIDE TO CAPACITY MANAGEMENT

Aanufacturer: Equ	lipment Status: Availa	ble			
Scheduled Time:	rt?				
11/5/24	10:50 PM	🗘 👩 From S	CS Interventional Radiology	То	
Priority Transpo Routine V 1 1	rters				
Behavioural Restraint	s Isolation	UV Pole	Monitor	☐ Oxygen	RN Required
					OK Cancel

**Note:** To choose locations click on the ellipses beside the from and to fields and search for the areas needed and then hit **OK**.

cation lab /	🖲 🖌 🔘 🛉 🔳 🛏
O     Lab / Blood Bank /Pathology (St. Catharines Site/St. Ca)       >      St. Catharines Site/St. Ca	ľ
✓ Q St. Catharines Site ✓ ⊕ St. Catharines Site	
<ul> <li>Sc Statistics site</li> <li>Zrd Floor</li> <li>Lab / Blood Bank /Pathology</li> <li>ScS 3A</li> <li>ScS 3A</li> <li>ScS 3B</li> <li>ScS Occ Hith &amp; Safety Screen COVID</li> <li>ScS Occupational Health &amp; Safety</li> <li>St. Catharines Site - Main Pharmacy</li> <li>Walker Family Cancer Center 3rd</li> <li># 4th Floor</li> </ul>	
Sth Floor	

8. Once this has been done this request will now be on the '**Transport List**' tab and this request will be sent to the closest and available porter by using proximity. The Porter will then come and get the equipment and deliver as appropriate.

👗 Pa	atient List 荐 1	fransfer Lis	t 🏦 Dis	charge List	🔯 P	reAdmit I	.ist 🥖 EVS Servic	s List 🔏 Tra	nsport List 🖾	Equipment List	Bed Board
Nam	ie:	~ 🍕	· 🔗					_	_	_	_
Nun	nber of Jobs	Patient:	0	Avg/hr:	0.0	Avera	ge Turn-Around Ti	me (MM:SS)	Average Res	oonse Time (MM:SS)	Response Tir
	0	Equipm	ient: 0	Avg/hr:	0.0		00:00			00:00	?
	Origin		Destina	ation		Priority	Name	Mode	of Transport	Comment	
	SCS Interven	tional	Lab/B	lood Bank	/P	Routi	Lab Routine				







#### **EVS CLEAN/REQUESTS**

**\*\*\*IMPORTANT**\*\*\* Niagara Health Staff *should not* be entering ad-hoc clean requests. If there is a spill or need for supplies use the EVS Requests link in the Managed Favourites folder in your web browser.

Capacity Management will **automatically** generate a bed clean request when patient is transferred out of their bed or discharged completely.

The Bed Pill will update with a status of "**Dirty**" and there will be a broom icon on it.



On the "EVS Services List" gadget, you can view active jobs and their status. You can also view the status of the request and the EVS Staff member who has been assigned to the job.

	Location	Status (Bed)	Priority	Туре	Status	Comment	EVS Tech	
)	WS 3 South Monitored	Dirty	Routine	Transfer	Requested	Standard Transfer Clean		100

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#### ADDITIONAL RESOURCES

Niagara Health Tip Sheet Site: https://www.niagarahealth.on.ca/site/his-tip-sheets An Overview of Capacity Management (Common Workflows and Processes) Admission & Receiving Orders **Transport Request Process** External Transfer Using the Discharge Gadget Clerical Discharge and External Transfer Patient Process **Discharging a Patient** Discharging Unit Role for all Discharges Care Aware Perspectives Careview Attributes - MEDSURG Oracle Health Capacity Management Overview Careview Attributes - Mental Health (video) Careview Attributes - Rehab - Complex Care Viewing Available Surgical Beds (video) Ordering Non-Urgent Patient Transport Viewing Patient Downgrades (video) MTP Blood Products Request How to Filter Patient Attributes (video) Lab Specimens Request How to View Census per Unit (video) Wrong Encounter Assigned

#### Digital Dive In Recording of Capacity Management Demo:

https://niagarahealthsystem.sharepoint.com/sites/source-net/Programs/HIS/Pages/Digital-Diveins.aspx

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