# A Guide to Capacity Management

**Updated Jan 1, 2025**

# Contents

# 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.

**Example of the Patient List and Bedboard**



## ACCESSING CAPACITY MANAGEMENT

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

**Login Screen**

**Desktop Icon**



**CapMan**

**PowerChart Icon**

## ROLE FUNCTIONS IN CAPACITY MANAGEMENT

**Bed Monitors can:**

- Assign Beds (within their site plus AND from site to site)
- Complete Transfer Requests (within their site plus AND from site to site)
- Complete Transport Requests
- Create Pre-Admits  when called and asked for Direct Admits

**Nurses can:**

- Complete Transfer Requests (within their site plus AND from site to site)
- Create Transport Requests (Including Equipment)
- Modify Attributes
- Add Discharges to the Discharge List
- Discharge Patients from the Discharge List

**Clerks can:**

- Complete Transfer Requests (within their site plus AND from site to site)
- Create Transport Requests (Including Equipment)
- Modify Attributes
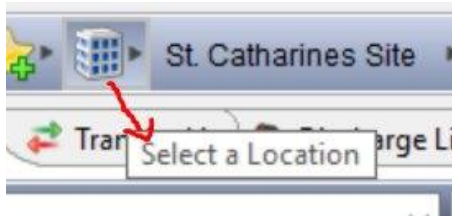- Discharge Patients from the Discharge List
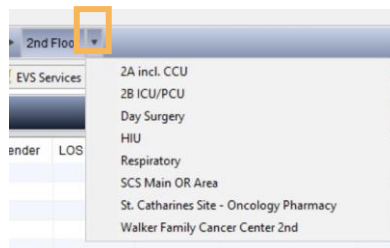
## CUSTOMIZING YOUR VIEW IN CAPMAN

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.

## 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.
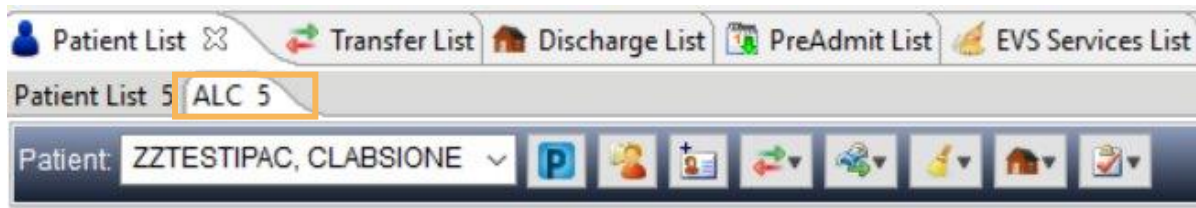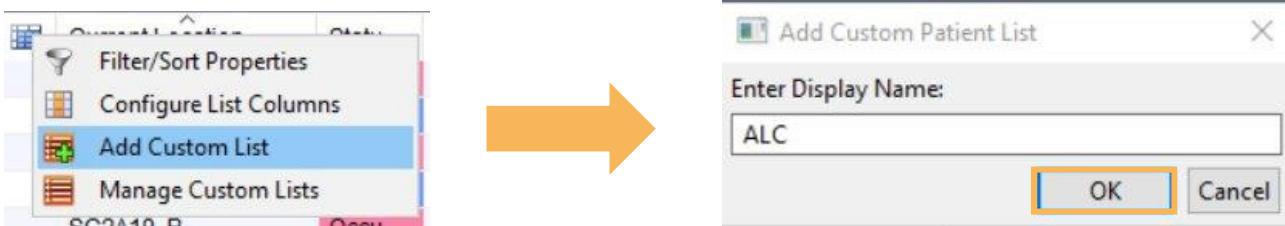
## FILTERING THE CUSTOM LIST

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.
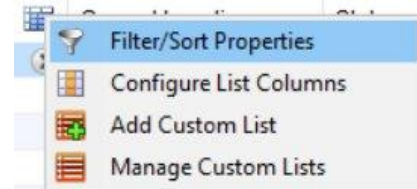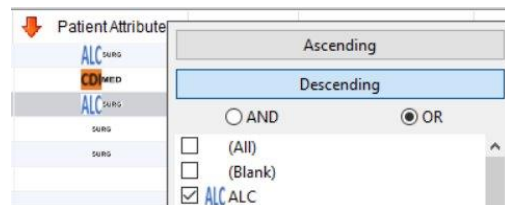
## EXAMPLE OF A FILTERED CUSTOM LIST

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



## CUSTOMIZING YOUR VIEW

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

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

| 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 | ALC SURG | | ⇄ 🏠 |
| SC2A17, A | Occu... | ZZTESTIPAC, CAUTI... | 44 y... | Male | 07 02:43 | SURG | | ⇄ |
| SC2A18, A | Occu... | ZZTESTIPAC, CAUTI... | 34 y... | Female | 07 02:29 | CD MED | | ⇄ |
| SC2A19, A | Occu... | ZZTESTIPAC, CLAB... | 48 y... | Male | 07 02:07 | ALC SURG | | ⇄ |
| SC2A19, B | Occu... | ZZTESTIPAC, COLO | 33 y... | Female | 07 01:59 | SURG | | ⇄ 🏠 |
| SC2A20, A | Availa... | | | | | | | |

| Current Location | Statu... | Name | Age | Gender | LOS | Patient Attributes | Isolation | Attending Physician (... | Encounter Milestones |
|---|---|---|---|---|---|---|---|---|---|
| SC2A16, A | Occu... | ZZTESTIPAC, CLAB... | 54 y... | Female | 07 02:17 | ALC SURG | | | ⇄ 🏠 |
| SC2A17, A | Occu... | ZZTESTIPAC, CAUTI... | 44 y... | Male | 07 02:43 | SURG | | | ⇄ |
| SC2A18, A | Occu... | ZZTESTIPAC, CAUTI... | 34 y... | Female | 07 02:29 | CD MED | Clostridioides difficile | | ⇄ |
| SC2A19, A | Occu... | ZZTESTIPAC, CLAB... | 48 y... | Male | 07 02:07 | ALC SURG | | | ⇄ |
| SC2A19, B | Occu... | ZZTESTIPAC, COLO | 33 y... | Female | 07 01:59 | SURG | | | ⇄ 🏠 |
| SC2A20, A | Availa... | | | | | | | | |

# 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.

A **blue**/**pink**/**grey** "OC" means the bed is occupied.
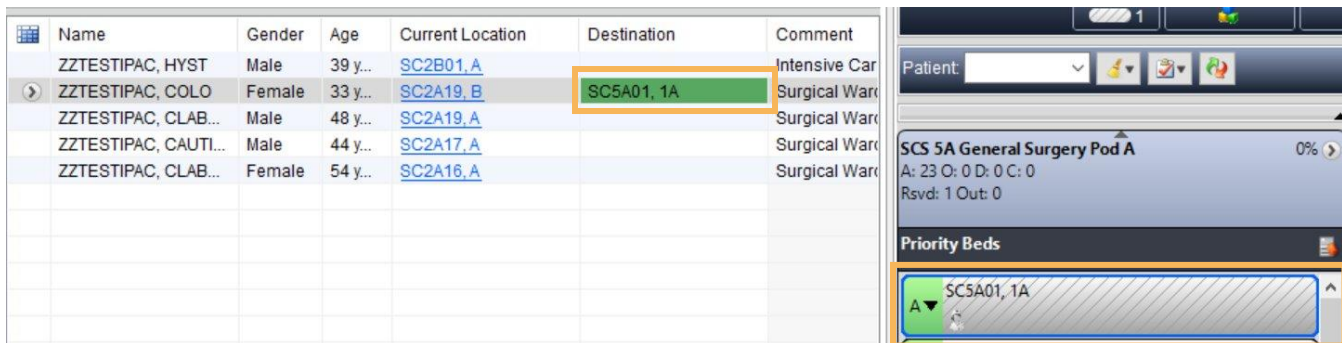
# BED FLOW: ASSIGNING AND TRANSFERRING A PATIENT

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.



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.



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

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**"



## ADDING A TRANSFER BACK IN

In some cases, someone may accidentally cancel a transfer from the Transfer List. Nurses, Bed Monitors and Ward Clerks are all able to put this transfer back on the transfer List.

To do this:

1. Find the patient on the **Patient List** or **Bed Board**.
2. Select the patient and click on the Transfer Icon.
3. Select **+Transfer Patient** from the drop-down list. This will add the patient back onto the Transfer List.



4. Open **PowerChart** and look at the **Order** associated to see the type of Medical Service, Level of Care and MRP ordered.  Input this information into the Comment Field on the Transfer List tab within Capacity Management.
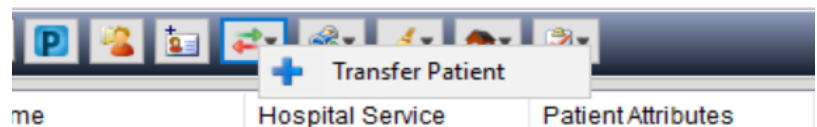
Note – patients can also be added this way they are going to another Site for IR/OR/HIU and the prescriber has not put in the Order yet. Just be sure to add in the comment "SCS IR, appt date and time if known".

## 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  select the **Transport Prep Request**  icon to request patient transport.

3. Search for patient and click **OK.**



4. The requester will need to remove manually once appointment complete.
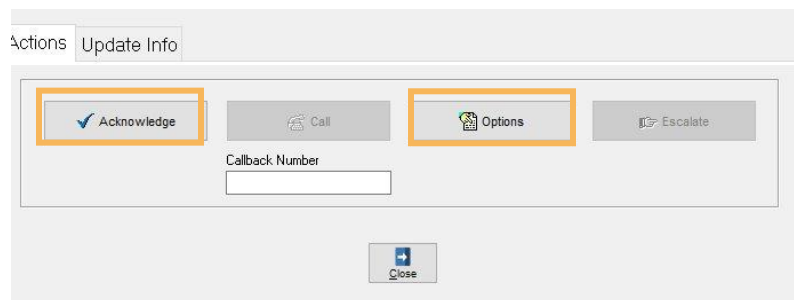
## Checking for Connexall Alerts Requesting Patients on the Desktop DAC, or WOW



1. Open Desktop DAC



2. Double Click on call and Acknowledge

3. When the patient is ready to go to the appointment (including having reviewed RN/Tech/Clerk requests - e.g. sling, stretcher, IV, etc) click **Options**.

4. The Unit Nurse selects Transport Request in CapMan and selects **OK**.
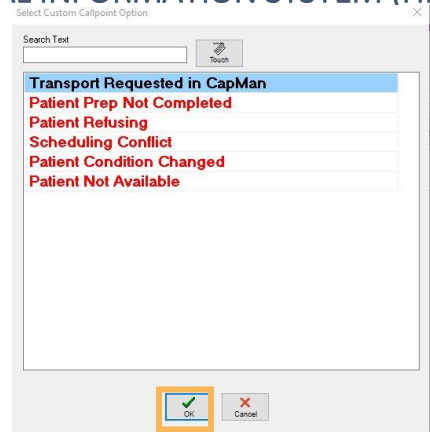


## Checking for Connexall Alerts Requesting Patients on the Vocera Badge

1. Alerts to badge – select appropriate alert
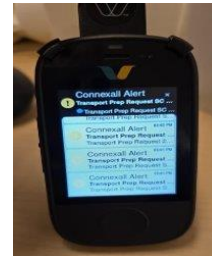


2. Open Alert



3. Select an option and the call will clear off the badge
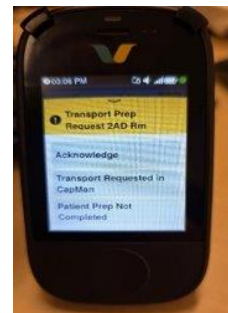


After completing one of the options above, you are now ready to move on to Capacity Management (CAPMAN) to request a Patient Transportation Porter.

**Note:** Connexall needs to be used in Porter requests, so that the unit has time to get the patient ready (e.g. getting an IV in, going to the washroom). Capacity Management doesn't have an alert for the nurse to get the patient ready and using Connexall ensures that the porter's time is being used effectively rather than having them wait for the patient.

## 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.

## 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**".
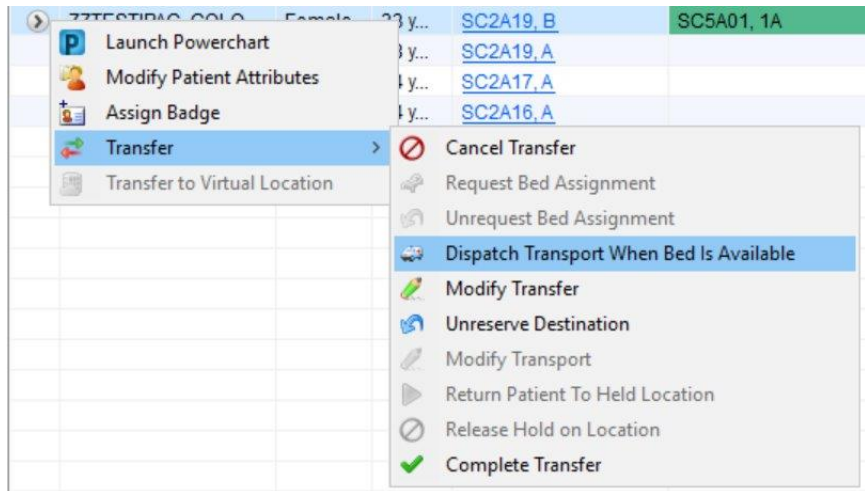


## REQUESTING A PORTER-TRANSPORT

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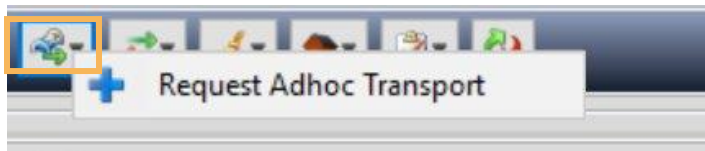


Fill in destination using the ellipses in the "**to**" field and selecting the desired location.
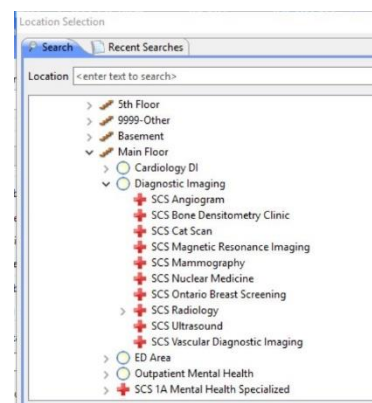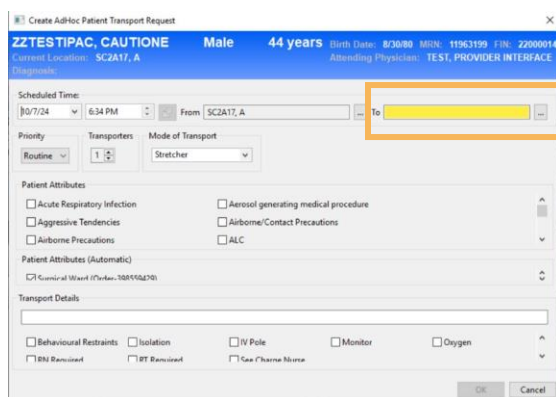
When filed, this creates the request which will go to the nearest available porter's mobile device and fall onto the "**Transport List**" gadget.
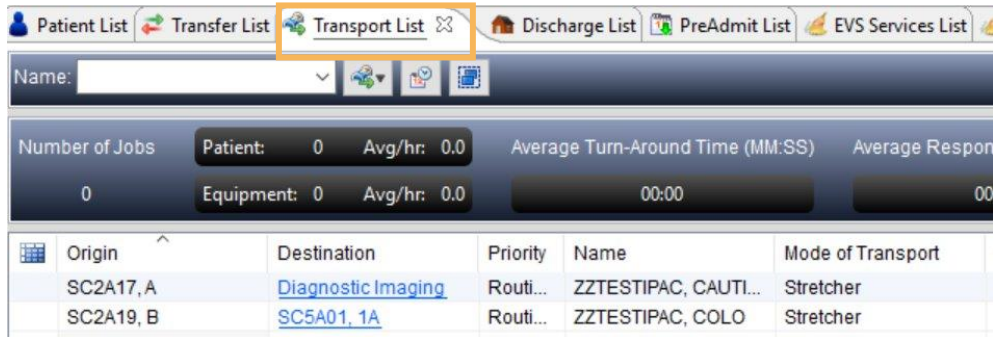


## EQUIPMENT TRANSPORT

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 |

## REQUESTING EQUIPMENT TRANSPORT

1. Log into Capacity Management

2. Click on the Building Icon and pick the correct site

   Fort Erie Site
   Hotel Dieu Shaver
   Niagara Falls Site
   Port Colborne Site
   St. Catharines Site
   Welland Site

3. Go to your '**Equipment List'** tab.

Patient List | Transfer List | Equipment List | Bed Board | EVS Services List | Transport List | Discharge List | PreAdmit List
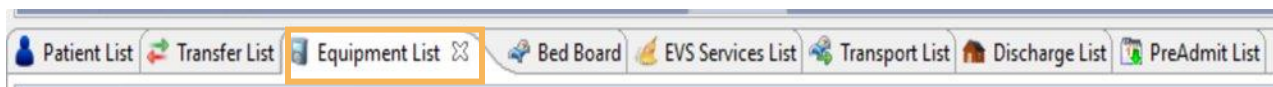
4. On the Equipment List tab, click on the '**Global Search'** button, a '**Global Search Equipment Parameters'** window will open, in the '**Description'** field type in what is being transported (in this example, lab has been entered) and hit '**Search'**.

   Global Search Equipment Parameters
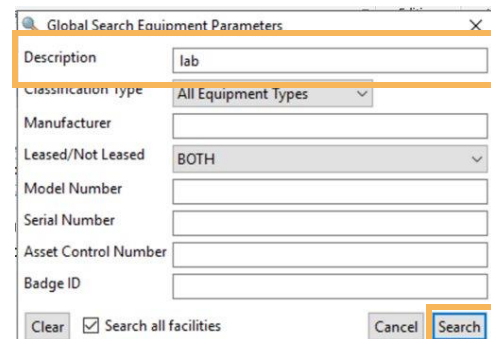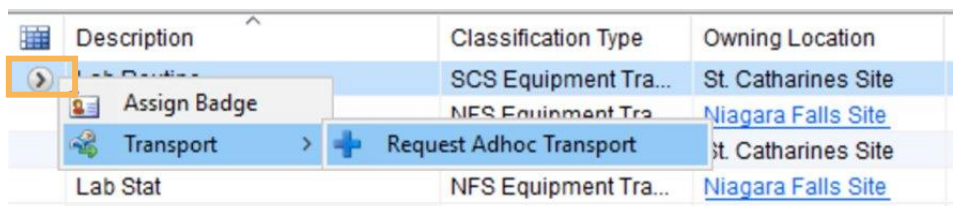   | | |
   |---|---|
   | Description | lab |
   | Classification Type | All Equipment Types |
   | Manufacturer | |
   | Leased/Not Leased | BOTH |
   | Model Number | |
   | Serial Number | |
   | Asset Control Number | |
   | Badge ID | |

   Clear  ☑ Search all facilities    Cancel  Search

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
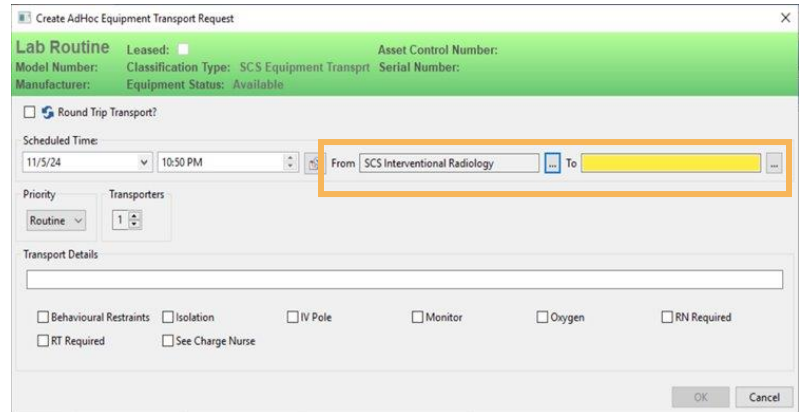
   | Description | Classification Type |
   |---|---|
   | Lab Routine | SCS Equipment Tra... |
   | Lab Routine | NFS Equipment Tra... |
   | Lab Stat | SCS Equipment Tra... |
   | Lab Stat | NFS Equipment Tra... |

6. Click the arrow to the right of the correct **Description**, scroll to **Transport** and click on '**Request Adhoc Transport'**.
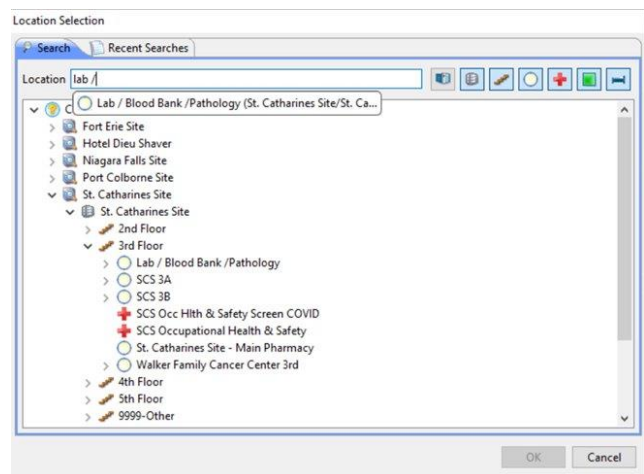
   | Description | Classification Type | Owning Location |
   |---|---|---|
   | Lab Routine | SCS Equipment Tra... | St. Catharines Site |
   | Assign Badge | NFS Equipment Tra... | Niagara Falls Site |
   | Transport > | Request Adhoc Transport | St. Catharines Site |
   | Lab Stat | NFS Equipment Tra... | Niagara Falls Site |
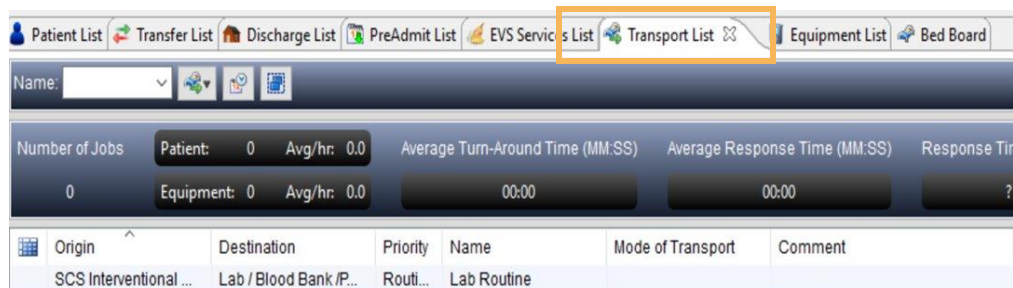
7. The create AdHoc Equipment Transport Request window will open. All necessary information including the specifics of where the equipment can be picked up and where it is going.



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



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.

## 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 | Type | Status | Comment | EVS Tech |
|----------|--------------|----------|------|--------|---------|----------|
| WS 3 South Monitored... | Dirty | Routine | Transfer | Requested | Standard Transfer Clean | |

## 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

Careview Attributes - Mental Health

Careview Attributes - Rehab - Complex Care

Ordering Non-Urgent Patient Transport

MTP Blood Products Request

Lab Specimens Request

Wrong Encounter Assigned

Oracle Health Capacity Management Overview (video)

Viewing Available Surgical Beds (video)

Viewing Patient Downgrades (video)

How to Filter Patient Attributes (video)

How to View Census per Unit (video)

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

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