



OR Manager User Guide

Picis Perioperative and Critical Care 10.0

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Caution: The data displayed on Picis Clinical Solutions applications are for informational purposes only. Picis Clinical Solutions recommends that users always refer to primary devices for diagnosis and treatment.

Hardware Requirements: Detailed hardware requirements are provided during the contract process. Please contact your System Administrator or Picis representative should you require additional information.

Nomenclature: The expressions "real-time data", "real-time variables", "real-time fluids" etc. are Picis expressions that refer to near real-time data collected from connected devices.

Removal of Picis software: For information on removing Picis software, please refer to the *Release Notes*.

Troubleshooting: If you encounter problems with the installation, configuration or use of the product, please contact your Picis representative or submit a support request.

Hard copy: Paper copies of certain guides are available. Please contact your Picis representative for details.



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Refer to the *Release Notes* for date of manufacture.



Document may include cautionary statements.



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Unique Device
Identifier (UDI)

For UDI information, refer to the *Release Notes*.

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Introduction

Overview

Welcome to the iM Manager user guide for Flow Management and Clinical Case Mix.

iM Manager is used to automatically document every aspect of processing a surgical patient.

There are five major areas of functionality:

- **Scheduling/Booking** allows scheduling staff to identify available time slots for patients, while taking room, resources, and management needs into consideration. iM Manager captures your organization's Scheduling Rules. Patient rules (PDRs) is a partially automated patient identity.
- **Integrative Charting** uses designed screens facilitate automated case documentation. Examples using all the components of the case set up the information for automated billing and supply management.
- **Reference Guide** Reference guide link to your Materials Management system to allow single master maintenance of items. Reference guide provide output of both product and services.
- **Case Tracking** Your product code enable you to analyze both supply and non-supply costs of completed cases by a number of criteria including surgeon, procedure, organization/unit combination, and user defined cost categories.
- **Automated Billing and Tracking** Billing rules facilitate supply management through documents of materials and recording of patient related items.

About the Documentation

IBM Manager user documentation is closely associated with IBM Manager configuration documentation and SmartTrack documentation. The following sections explain how the documentation sources are related and how you can get the most out of them.

- **IBM Manager user guide.** This documentation is available as a help system and a PDF manual. It shows you how to perform day-to-day functions with IBM Manager such as creating users, managing user records, and viewing reports.
- **IBM Manager configuration guide.** This documentation is available as a PDF manual. It shows you how to set up IBM Manager by installing add-on modules, setting limits and reports, and setting permissions.
- **SmartTrack user and configuration guide.** This documentation is available as a help system and a PDF manual. It shows you how to prepare and use SmartTrack for day-to-day functions. SmartTrack uses data from the same records that are set up for IBM Manager.

The guides open in Adobe Reader.

Get Acrobat. Configure Adobe Reader to open when PDFs in a new window. Contact the Adobe Reader help file for instructions.

Terminology

IBM Manager uses the following conventions:

Term	Usage
Screen	Application windows are referred to as "screens."
Procedure	Step-by-step instructions are referred to as "procedures."
Document	A "document" is a short name for an item or content. The full name is often referred to as the "description".
	Example document: IBM Manager Description Document Page

What's New in this Guide

New in 5.0 (B1)

The Job Cost Tracking page now includes a job configured page for progress notes. After the page has been completed, the user can click the **Progress Note** button to export it to track as a TFC note.

New in 5.0 (B1)

The Job Cost Tracking page now includes a "Job Progress Note" section with two job configured pages. After the pages have been completed, the user can click the **Progress Note** button to export the section to track as a TFC note.

Carried Forward from 5.0 (B1)

Job Manager now integrates with track as job data. For more information, see the Job section of this guide.

Carried Forward from 5.0 (B1)

Major changes and enhancements noted in this guide for the 5.0 (B1) release are listed below:

- New option for filtering surgeons and anesthesiologists in tracking windows when working in a multiple facility environment.
- New option to create automatic email notifications and reminders in the tracking window based on primary procedure or primary surgeon.
- New Service Patient message when a user is released from a tracking where the patient has a therapy event and does not have a call number and user selects the **ADN** option on the user. This is available as a customization when enabled.
- Permit the custom setting to be disabled for administrators who have no rights to use Facility Manager and Anesthesia Manager. When this customization is enabled administrators with no access to either module will be able to do the following:
 - Open multiple tracking sheets at one time.
 - Open user records.

Carried Forward from 5.0 (M5)

No CSM Manager enhancements in this release.

Carried Forward from 5.0 (M5)

Major changes and enhancements noted in this guide for the 5.0 (M5) release are listed below:

- Support is now Flex.
- Support CSM Manager is now referred to as CSM Manager.
- Support Pattern Tracking is now referred to as OrderTrack.
- Support CSM Security Manager is now referred to as Security Manager.

Carried Forward from 5.0

Case Record Functionality Enhancements

The following enhancements have been made to case record functionality:

- When privileges are not assigned to Case Record functions, the users are redirected to the sign screen.
- For creating and update cases, if an incident has been record was previously selected, those details in the drop down along with active entries.
- All the standard fields are available in the custom select fields when creating conditions for adding and for modification/recommendation fields in the case record. Any standard field can now be applied which replaces the previous limitation of having only few fields available.
- The list of user fields for Case Records, Case Record Pattern Data, Pattern Data, and Booking Data can define fields up to the following: Name, City, Address, Location, Status, Contact, and other custom Custom Fields. If any of these specific field type do not exist, the selection has been not display.
- The Booking ID# has been added as a standard field for Case Records and prints in the header of a printout for standard case records.
- Case Record level collections records, for those collections which are used to generate data exchange, report or statistics field getting which is that field has a corresponding data field to provide better reporting documentation.
- The top bar of Printing header is Case Data mode now displays header - (CRM CRM) instead of Incident Data header - (CRM CRM).
- The Case Record number prints in the header of Incident Records.

- The following items are available in the Case Record Process Header: **Accounting**, **Account**, **Resource**, and **Resource**. An account header with procedures is also available (procedures in a set of modified procedures.)
- A new header in the Case Record Header, **Case ID**, shows all headers of a Case Record with a single link. The entry is updated in the Case Record Header. The information displayed includes the following:
 - **Header ID** (ID)
 - **Case ID** (ID)
 - **Header ID**
 - **Header ID**
 - **Header ID**
 - **Header ID**
 - **Header ID**
 - **Header ID**
- Users can create new header entries for new headers and new records. The only exception is in the case record header in the Case Record Header.

NOTE: To maximize and extend findings, I am confident that these results are ultimately generalizable. Thus, there is a high degree of confidence that these results are generalizable.

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When a person provides a sample of saliva in a testing kit, the information can be provided to a third party. The company that provides the kit is responsible for the information provided. It is not the responsibility of the person who provides the sample. The company that provides the kit is responsible for the information provided. It is not the responsibility of the person who provides the sample.

- [illegible]

Note: The meeting was closed to the public. If an individual has been denied access to records, they should contact the records manager.

Introduction

What's New in this Guide

- The **New Book** field on the bookings sheet has been expanded to **New Book/Place** at the bottom right of each page to show when the Booking Sheet was printed on the printer.
- If you editing on the Registrar Office you are in Security Manager, sometimes whether or not a user is restricted is not only coming to a suggestion's bookings. When the user attempts to access a Booking that has a New Booking Only Suggestion, a message is displayed that informs the user that access is restricted. Users are restricted from creating a New Booking/Reservation for the suggestion that are flagged as New Only Booking. Now the SF Security user could be more informative.
 - The Booking suggestion drop down list only includes those Suggestion who have not been restricted to New Only Booking.

Business Events

- A new printer display when a user tries to document a future date/time: **Business Event**

Manage Bookings and Other Changes

- A new search field provides the ability to retrieve bookings in Manage Bookings and user records in Manage User Records based on the subject ID# or ID# associated Healthcare Number.
- When conditions for editing have been assigned to fields, and the response that meets the condition is changed to a response that does not, the user is prompted to confirm whether or not they want to edit the field under condition. If the user clicks **No** in this prompt, all of the values in the field associated with conditions for editing are returned. If the user clicks **Yes** in the prompt, the response when changes for the conditional field value do not they return as they were. See the SF Manager Configuration Guide.
- The " " Booking Procedure description box is both the Bookings and the User Record header has been updated. **Book**
- A new printer screen when a user clicks **Manage Header** and another screen is open. Clicking **OK** allows the user to continue to edit only fields.
- SFH search functionality has been removed and is no longer used in New Bookings, Edit or Cancel or other SF Manager or BookTools.
- The Manage Bookings Selection can be Special Equipment includes 196 items. Users can select from items to include or exclude from the search as other Bookings are returned. The filter is applied and the Bookings table meets the selected criteria.
- Printing from the following areas shows a list through a dotted string in the same way they appear in the application:
 - User Record Printout (Standard)
 - User Record Printout (Custom)
 - Worksheet (Custom)
 - Profile (Custom)

- **Building Blocks Standard**
- **Net Usage**
- **A warning message notifies users that invalid VDI codes are present in a building or code record in the following instances:**
 - New building from VDI
 - Change the data in a building or code record
 - Save VDI in a code record update
 - Copy an VDI building to a data when VDI is required
 - Check a code record update
 - Check all code record updates

See the **VDI Manager Configuration Guide** for additional information on VDI codes.

System Changes

- **A new button in the Procedure Dictionary provides users the ability to export Procedure items in the format of only Web items to allow up and down searching through items.**

2

Basic Concepts and Skills

This chapter covers the basics about how to log on to IBM Storage and how to navigate through the system's screens.

Topics in this chapter include the following:

- Creating ID cards
- IBM Storage Screen on the web page
- Using the IBM Storage on the web page
- Working with Screens on page 23
- Screen Screen on page 23
- Description on page 23

Logging On

Note: The IBM Storage tool is generally available in the Windows Start menu: **Start > IBM Products > IBM Storage**.

1. Double-click the IBM Storage icon.
The IBM Storage screen appears.
2. Enter a valid user name and password (user identifier) to log on and then click **OK**.

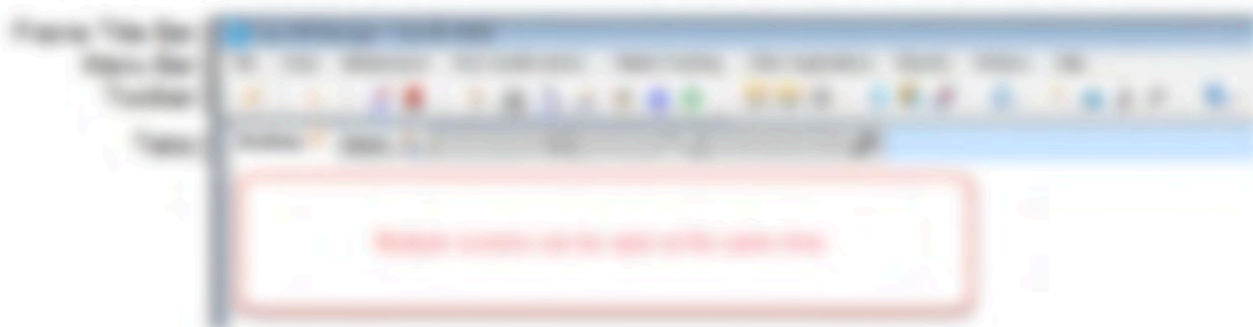
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

Note: Whether or not the **Change Password** button is present in your window depends on your system configuration. If Windows Remote Authentication is used it will never be present. If configured to your site, there is also a button for changing the **Domain** in fig. 2-10.

CIS Manager Screen

The CIS Manager screen has the following parts:

- **Title Bar:** Tells you where you are in the CIS Manager system.
- **Menu:** The commands on each menu depend on the active screen and user security settings.
- **Toolbar:** Contains buttons for quick access to frequently used commands. The buttons on the toolbar change depending on the active screen and user security settings. (You can change the look and position of the main toolbar by selecting the **Toolbar** command from the **Window** menu.)
- **Subcategory window:** You can have several windows open at once, letting you move easily throughout the different parts of CIS Manager.
- **Title Bar:** The title bar of each window gives you summary information on the window's contents.
- **Table:** Tables are used for lists or folders in the software.
- **Status:** The **Status** window gives general information that applies with each screen, such as date and time.

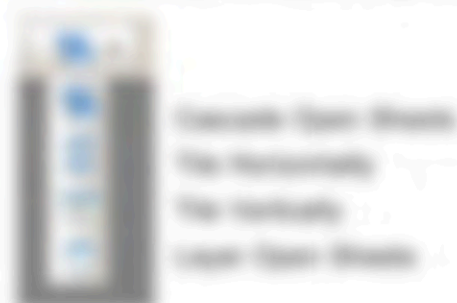


Using the Main Toolbar

The main CIS Manager toolbar has buttons for the most frequently used commands.

Icon	Description	Icon	Description
	New Booking		New Play icon
	Intermediate Case Record		New Case Worksheet
	New Action Case		Transfer Manager/Receptor
	Manage Bookings		Training Session
	Reserve icon		All Schedule
	Manage Case Records		New Screen
	Manage Publishing icon		All New Capture
	Schedule Case		New Current Booking
	Reservations icon		Last Case Record
	Network Diagram		History Log Capture

The toolbar also includes a drop-down selection for arranging screens:



Training Session

If the active screen is a training screen, two additional icons appear on the main toolbar:



Network Training Network



Security

Other Applications

The "Other Applications" menu is present, you may also see toolbar icons for one or more of the following Java applications:

- Network Manager
- Proxy Manager
- Performance

Note: This content is only visible if a network monitor window is open.

For more information, see the Security Manager User Guide.

Network

The "Network" menu is present, you may also see a drop-down list of custom icons providing access to external applications, depending on the configuration. (The following image is an example only; the actual icons will depend on your configuration.)



For more information, see the Security Manager User Guide.

Customize the Toolbars

There are two ways to customize the toolbars and placement of the toolbars:



- Select **Windows** > **Toolbars** to see the Customized Toolbars screen.
- Right-click the toolbar to see a toolbar menu.

For This Task	Do This
Change the toolbar's position on the screen	Click a "float" icon at the toolbar and hold down the toolbar while you drag it to where you want it. or Select Left , Right , Top , Bottom , or Float .
Show or hide a toolbar	Check/uncheck the toolbar name in the custom toolbar screen.
Show large buttons with descriptive text	Select Large Buttons .
Show descriptive text when you hold the cursor over the button	Select Show Tooltips .

Encryption

If administrators have configured Off Manager to provide encryption services, selecting the following tasks is not possible by themselves, since you're generating their values and is stored and through files that are generated by Java applications.

Tools > Options > File Integrity/Encryption/Encryption

Encryption and decryption services for files, certificates, and content files contents. Encryption services are provided by an application with the name `File Integrity/Encryption/Encryption`. These services are mainly intended for use with files that will be sent to an external system, but they can also be used to protect local or network-based files. For a complete explanation, see the [Technical Reference Guide](#).

Working with Screens

Display Options

Off Manager offers the following options for displaying the screens:

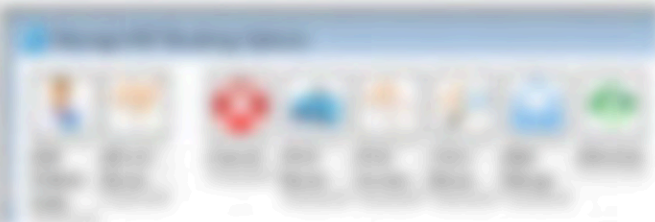
- **Tab**

- [Taskbar](#)
- [Taskbar](#)

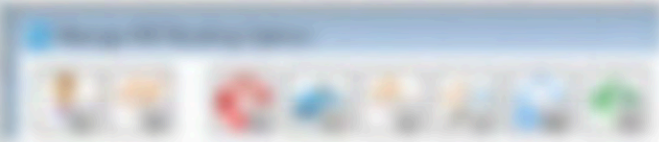
Accelerator Keys

Accelerator keys are key combinations, usually **Ctrl**, **Alt**, or **Shift** plus another key, that you can use in place of the mouse. Use accelerator keys to enter commands quickly, without interrupting your workflow to reach for the mouse.

File Manager Ctrl Key Combinations

Key	Description
N	Create a new window.
W	Close a new window.
S	Save changes to the active window.
F5	Refresh the active window. Group the main File Manager window to that use Alt + F5 .
F6	Move between File Manager windows.
F7	Show context descriptions for large folders in the windows that have them, such as the Manage File Sharing Options window shown in the example. The descriptions are hidden when Ctrl + F7 is pressed again or when the active folder or window is closed. For descriptions that are hidden, you can click the description to expand it. 

Alt+F Key Combinations

Key	Description
Working	Shows underlined buttons for menu buttons in the windows that have them such as the Storage FMT Working buttons screen shown in the example. 
Underlined Working menu	Shows commands in the menu that are underlined. Presses $\text{Alt} + \text{U}$ the underlined letter is what the command is. For example, $\text{Alt} + \text{U}$ is the same as clicking the File button. Note: Depending on the screen and the field is there, you may need to add the $\text{Alt} + \text{F}$ key combination before to activate it.
File	Closes the active screen, including the main GFI Storage screen if all other screens are closed.
U	Shows the list of screens when the screen is it is a different working menu.

Entering Dates (Today + or - Method)

When entering dates into GFI Storage fields, users often need to enter the current day's date or a relative date, such as "two weeks ago".

Rather than entering such dates manually, you can enter the value "Today" and the current date automatically enters. Or, you can enter "6" or "minus 6" to a number of days.

Example
6 Today
minus 6 The date seven days ago
Today The date is your first date

Entering Times

There are two ways to enter Time fields.

Basic Concepts and Rules

Working with Numbers

- You can enter the time in 24-hour notation. You do not have to enter a leading zero for the time before noon.

Example: Enter 120 and the system displays 12:00. Or, enter 1400.

- You can use a notation x stands for x hours the current time. If you enter 8 you get the current time. You can also enter $x+2$ or $x-2$ and the number of minutes after or before the current time to get a time relative to the current time.

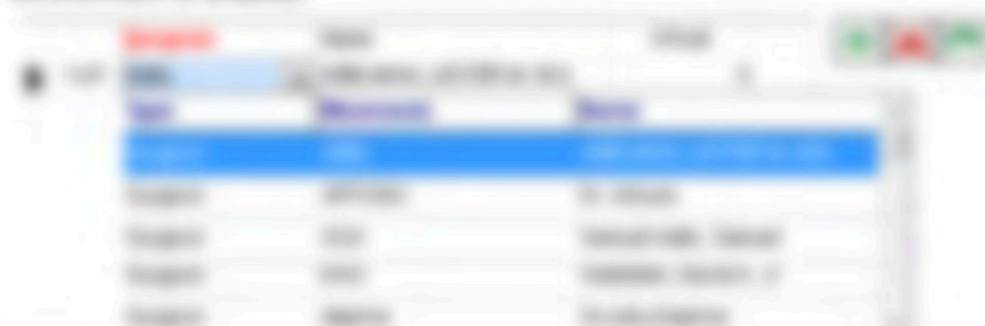
Example: If the current time is 1200 and you enter $x+15$, the system will display 1215.

Drop-down Menus

All Manager, table and reference fields other than the test fields have drop-down menus listing the items possible entries.

Note: Users do not use machine entries for new buildings and user records in drop-down fields. The only exception is with the user-defined forms drop-down fields.

The drop-down menu example is from the **Surgery** test on the **CR Building** window. All surgery tests in the **Surgery** dictionary appear on the list unless surgery planning for a multi-family environment is disabled.



Note: It is important with a test through it indicates the entry is currently inactive. Inactive entries are not available for use.

Star Search

A "star search" table returns your field entry search by finding a sequence of letters within the name or description column of drop-down lists and the **TestName** field.

Example: If you are searching for a surgery whose name contains the letters "card" it takes a long time to use the drop-down menu to scroll through the surgeries until you find the right one. So,

string is the search, you can narrow your search to those whose names contain the specified word, such as Smith, Henderson, Thompson, and Williams.

1. Type an asterisk (*) after the field.
2. Next to the asterisk enter a letter or string of letters to narrow your search. The more letters you enter, the fewer number of results are returned.

Note: The searches are not case sensitive.

Narrowing the Search

You can use the star search feature to search two strings of letters at the same time.

Example: To find the employees who, for the procedure, "number generator" enter "books get". The system finds all entries that contain both strings of characters.

Note: The order of the strings does not matter. However, only one asterisk is allowed, separating two separate strings. You can use results in an interactive format.

Report Screen

HR Manager uses the Reports screen in many parts of the application. The following is a quick reference:



1. **Group Buttons** - use these buttons to go back to the beginning, to the previous page, to the next page, or to the last page, respectively.
2. **Print** - use Print to print the information shown on the screen to the printer.
3. **Zoom** - use Zoom to adjust the amount of information shown on the screen, and the size of the font it is shown in.
4. **Save as** - use Save as to save the information on this report for a later date. You can choose any one of a number of formats to save the report in.
5. **Transfer** - use Transfer to save this screen to another user.
6. **Close** - use Close to exit the screen.

Overview

The following chapters discuss how to perform booking tasks:

- See *Off-Booking Overview*, Overview on page 10, to learn how to book an operation. This presents all of the possible variations in booking operations, such as multiple procedures, multiple surgeons, entering a patient, and the six different steps to search for an operating room.
- See *Procedure Tools*, Tools on page 10, to learn how to book your admission tools.
- See *Managing Bookings and Booking Tools*, Tools on page 10, for a discussion of the tools you have available to manage your bookings, including searching for groups of bookings, creating, cancel, creating new records from bookings, printing, deleting, adding and removing bookings, moving and reorganizing categories, and a host of other capabilities.
- See *Custom Tools*, Tools on page 10, for information on how to use the Custom Tools feature, which is useful for building custom operations of both the bookings and case records management systems.

Note: An appendix in the *Off-Manager Configuration Guide* provides information about the operation between different versions of Off-Tools. It describes the software that determines the work status of various tools as you work with bookings.

Booking

Booking and Case Record Internals

Booking Table

Icon	Case Type Name
	Booking Tab
	Follow-up Tab
	Booking Visit Tab
	Search and Tab
	Administrative Tab

Booking and Case Record Internals

The following diagram explains what happens in CRM Storage and associated systems when you book a sample.



1. **Repeat Search for images.** When you enter a patient's name, you can search for the patient or enter a new patient.
- **Repeat Search.** If the patient has a previous image at your facility, results already exist in the Imaging database.
 - **New Search.** If the patient has a previous identified to your facility, results is in your PACS. All locations and their data is added to the Imaging database.

Booking

Booking and Case Record Interface

- **New Patient:** If the patient has never been identified or had surgery at your facility, add **New Patient** to create a new patient record in the booking database.
 - Data from the booking database on the **Patient** tab.
 - **Patient selection:** The patient is identified for surgery through your HCR information module.
 - The patient data is copied to your HCR Medical Records database.
 - **Case record created:** A case record is created to document the surgery.
 - **Search CR Manager:** The case record database is searched for an existing record matching the patient data.
 - **Search Information:** The information database is searched for a patient identified for surgery. If they are found in the Information database, the CR Manager case record database is updated with the data.
 - **New Patient:** The patient data is entered into the CR Manager case record database.
 - Data from the case record database on the **Patient** tab.
- Additional options are available for individual users:
- The case record database can be linked to the booking database to search for a match on patient data.
 - If matching data is found in the CR Manager database, it is copied into the case record database.
 - Case Record Header info updated from booking database.
 - **Support tools:** Supports synchronization your CR Manager database with your HCR database.
 - Takes information from Information and Medical Records.
 - Updates booking database and case record database.

Changes, Revisions, and Procedures in Booking Patient Forms

The changes, revisions, and procedures entered within the case patient forms update the booking patient data for all bookings. When a patient booking or case is closed with an open or not, CR Manager changes the change, introduction, and surgical notes data for the patient.

- Changes and revisions entered on the HCR form are shown in bold.
- If an change is entered from a previously entered record it will be shown in underbracket text with the word "introducing" entered in CR Manager. Deleted HCR form changes are also shown after other changes.
- Changes are shown as underlined when they are under modification introduction showing in Healthcare Manager.

Formatting of Messages

Example	Source of Data	Description of Test Format
Example	Test Date	Example Date
Example	Medical Information Number	Test
Example	Test Update String	Example test with a subheading These strings are in the bottom of the list
Example Example	Test Update to MCI Test Update to MCI	Example test, regardless of source, includes medication changes that are added to medication starting in treatment strings

Note: Patient changes and updates should be reviewed and removed from CDR Storage if necessary.

Medical Record and Account Number Updates

In transactions are that in the interface database (IDB). Requests should not transaction and processing. If it is a Medical Record Number or an Account Number that has been that in the IDB database, either a building or a case record has been added to that number.

2. Example: This application is not support the use of account account numbers. If account numbers are required patient information is not and identifier by another patient data.

- All updates to demographic data Medical Records are that as patient data. These are identified by all buildings in a patient.
- Updates are that for a particular account number. Information is updated differently with the case record depending upon where the information needs with the case record. There are the main types of case data:
 - Case Record Number (account/account information)
 - Case Record Case Record Patient Data Form
 - Case Record Case Record Patient Data Form

Billing

Billing for Account and Account Number Updates

- Integration with Billing between CRM Manager and Salesforce Manager, Price Manager, and so forth.
- Exception Billing Examples

Case	Example	System Behavior
Case 1: Account Number Update	Account Number Update	Continuously updated after updates to account number are received by Price. Case status complete is provided when not applicable.
Case 2: Account Number Update	Account Number Update	Continuously updated after updates to account number are received by Price. Case status complete is provided when not applicable.
Case 3: Account Number Update	Account Number Update	Continuously updated with the case is placed into a completed status. An update that after a case is placed into a completed status. Even if the case is subsequently not back into an in progress status.
Case 4: Account Number Update	Account Number Update	Updates are updated regardless of case status completion or in progress. The case status is updated from In Progress to either completion reporting complete.
Case 5: Account Number Update	Account Number Update	Updates are only updated manually by user after case status. The completion is the update are updated to the case status after the update. This update status reflects a completed and configured to update the case status.

OR Booking Screen

Chapter Contents

This chapter covers the following:

- Operating Office call
- Booking Booking
- OR Booking Screen Overview
- Booking Tab: Introduction
- Booking Tab: Surgery and Procedure
- Booking Tab: Patient Surgery and Procedure Procedure
- Booking Tab: Surgery Procedure Step
- Booking Tab: Staff (RN, Resources, and Health Insurance)
- Booking Tab: Facility Information
- Booking Tab: Appointment Setting
- Referring Physician call
- Booking Patient Tab: Overview
- Patient Tab: Patient Search Screen
- Patient Tab: Patient Search Results

Off-Boarding Screen

Physician Office Link

- Select Job Code
- Select Job ID
- Select Job ID
- Select Job/Person Information

Physician Office Link

Off-Boarding may be installed in office settings if a hospital is unable to install in a dedicated machine.

Using Physician Office Link requires high-speed access to Off-Boarding, which can be achieved in the following ways:

- Remote office has direct access to the network.
- Remote office has access to the network through a Virtual Private Network.
- Remote office can use Off-Boarding as a CD-ROM connection, which requires a dedicated server.

After connectivity is established, Security Manager restricts access to Off-Boarding screens except for screen log, exceptions, and users who are restricted in the hospital. However, the Physician Office Link will not in Security Manager further restrict access.

See the Security Manager user guide.

Quick Start: Book a Case in 30 Seconds

1. Select a Surgeon and a Procedure.
2. If necessary, change the Time procedure's location to remote.
3. Select Resources if needed.
4. Select any additional Equipment and Tag/Procedure, Resources, and Description needed for the procedure.
5. Select a tracking method and specify which Fields and Rooms to search. Select a patient from the Patient list if you have not yet been selected.
6. Click the Go button to open the Patient app and begin tracking. Many fields shown in the following graph populate automatically after you select a surgeon and procedure.



Boarding Roadmap

This section provides an overview, or roadmap, of the sequence of activities performed to complete a task. Because there are many possible variations, this table presents only the most general description of what happens at each stage. See also:

See [Boarding Screen Flow Diagrams](#) at page 22 for a diagram of the process.

1. Boarding in New Building

The Board Off-Boarding screen opens in front of the Off-Boarding screen.

2. Board an Off-Boarding train and Board

The Board Off-Boarding screen shows, displaying the Off-Boarding screen.

3. Show the information on the Boarding tab of the Off-Boarding screen. See [Boarding Tab Information](#) at page 22 for Boarding, Off-Boarding information at page 22. The information and the location of the screen and procedure is automatically associated with the boarding screen.

Off-Booking Screen

Off-Booking Screen Overview

The goal of creating a bill:

1. From the **Request** tab, enter the information:

The screenshot shows a software interface with a top navigation bar containing 'Request' and 'Bill' tabs. Below the tabs is a toolbar with various icons. The main area contains a form with the following fields:

- Name:** A single-line text input field.
- Address:** Three single-line text input fields for street, city, and state/zip.
- Phone:** Two single-line text input fields for area code and number.
- Mailbox:** Two single-line text input fields for mailbox number and PO box.
- Apartment:** A single-line text input field.
- Vehicle type:** A dropdown menu and a text input field for license plate.
- Make:** A dropdown menu and a text input field for model.

On the right side, there is a sidebar with a 'Details' tab and a 'Print' button.

2. Click **Bill**.

Depending on the booking method selected on the Booking tab, a booking bill or a request bill is displayed to select a date and time. After further checking is completed, the operation is booked for the date and at the time you specified. Another bill is required, or added to the first bill.

3. Click **Done**.

The pattern is scheduled for surgery.

Off-Booking Screen Overview

The following functions are available from the Off-Booking screen:

- Book a surgeon and a room for a procedure.
- Book equipment, responsibilities, resources, and anesthesiologists.
- Set a surgeon's average time for a procedure.
- Set average waiting and start scheduling conflicts.
- Review patient data, including demographics, insurance, and clinical information.

Note: If any surgeons at a facility are set to **Flow Only** in the Physician Office and set to **Security Manager**, the booking will be read-only and no edits allowed.

Pre-Booking Test Button

The **Pre-Booking Test** is used to schedule surgery patients for pre-booking testing.



See the **Pre-Booking Test** on page 55.

OH Booking Screen Tabs

The OH Booking screen has the following five tabs. Some of the tabs are available only with particular booking options.

- **Booking** This is the scheduling area for booking a surgery. It is where the booking method, surgery, procedure, anesthesia, equipment, implants/DRG, etc. that are necessary for the procedure are selected.
- **Patient** This section contains where the patient is identified and patient and surgery specific information for the facility is entered.
- **Booking Grid** The booking grid shows the rooms and times available for the surgery.
- **Search Grid** This tab presents a list of rooms that meet your criteria for times, dates, etc.
- **Instructions** This tab opens a word processing document for viewing and writing booking notes and patient instructions. Both of which flow from the Booking Notes document. See **Booking Instructions** on page 55.

See the **Booking Document** and the **Booking Notes Document** sections in the OH Manager Configuration Guide.

Booking Screen Flow Diagram

The following diagram illustrates the typical work flow from tab to tab as you book a patient for a surgery.

Note: This is a basic diagram designed to show how the tabs are used and in what order. It does not include the many variations and steps it includes the **Instructions** tab because it is not directly involved in the booking process.

See **Booking Overview** on page 42 for a step-by-step description of patient booking.



Booking Options Menu

The Booking Options menu provides a way of accessing many of the OH Booking screen features from one place. Many of the submenus in this menu are duplicated elsewhere, while some submenus are unique to this menu.

Menu Item	Description and References
Change Facility	Enables you to change the facility into which you are booking the procedure.
Change Patient	Enables you to change the patient for which you are booking the procedure. Patient List, Patient Search, Patients, on page 25
Get Basic Patient Info	Brings up the Patient pop in Basic Patient information mode. Basic Patient information Mode, on page 25
Print Form	Brings up the Patient pop in Print mode. Forms, on page 25
Get Booking Note	Opens the Notes/Instructions pop in the Notes screen.
Get Booking Instructions	Opens the Notes/Instructions pop in the Instructions screen.
Get Current Booking	List all books in the booking so that you can edit them.
Print Booking Test	Opens the Print Booking Test screen. OH, on page 25
Get Booking History	Opens the Booking History screen from the Booking/Procedure State. Forms and Buttons, on page 25
Book Booking Procedure	Opens the Booking Booking Procedure screen. Booking Booking Procedure, on page 25
Get Booking Patient Info	Opens pop from the Forms mode of the Patient pop. Patient List, Patients, on page 25

Off-Boarding Screen

Booking Tab: Introduction

Name	Description and References
	This screen shows you on in the booking process. Depending on the booking method and the current screen, it will either change the tab, change the screen or proceed to finish the required action (e.g. booking). The button becomes available after sufficient data has been entered to identify the patient and book the operation. Booking Method: Book Buttons on page 10

Booking Tab: Introduction

You can use the **Booking** tab to collect the necessary data, surgery procedure, resource, equipment and responsibilities. You are automatically and incrementally notified about any conflicts and scheduling information, allowing you to make adjustments and proceed the operation.

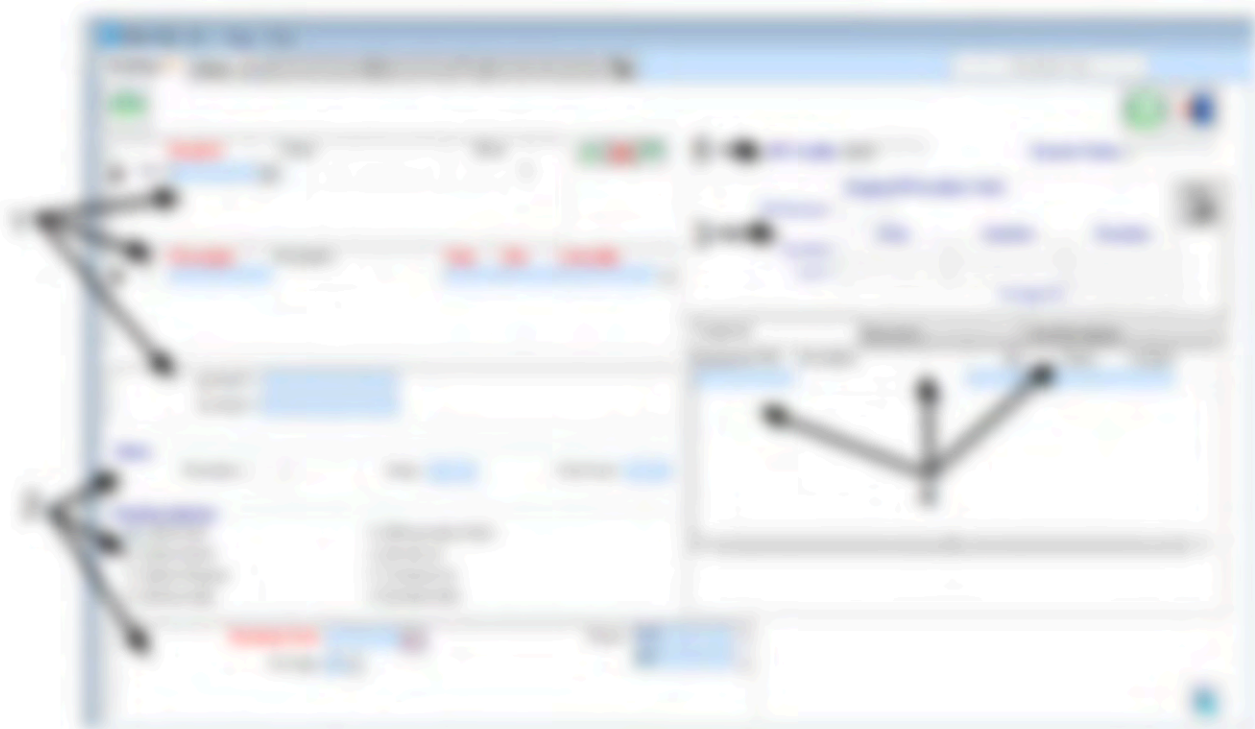
Regions

The **Booking** tab has five regions:

1. **Surgery and Procedure**: This is where you enter the surgery procedure and equipment.
2. **Scheduling Options**: This is where you set the location of the surgery, including all procedures and set up and run down times, booking method, dates and times, and more. Most of the information defaults is automatically.
3. **Surgery and Procedure Date**: Provides the option of scheduling surgeries for Complete or Single dates, and provides an estimate of the total time the surgery effort will spend at the facility of the selected surgery/procedure combination.
4. **Equipment, Resources, and Responsibilities**: sets the default equipment, responsibility, resource, and responsibilities to the operation.
5. **Facility Information**: Shows which facility you are booking the surgery for and its current status.

The tab also has buttons for **Refresh**, **Go**, and **Close**.

Note: Invalid entries in the information do not appear in the drop down fields of these booking regions.



Important Building Tab Functions

See the following sections to understand important Building tab Functions:

- [View an alternate Procedure Description on page 42](#)
- [Add additional Surges on page 42](#)
- [Add alternate Surges on page 42](#)
- [Add additional Procedures on page 42](#)
- [Delete Surges and Procedures on page 42](#)
- [Delete a Surge on page 42](#)

Building Tab: Surges and Procedures

The Surges and Procedures region is where you enter the surges and the procedures for an operator.

Off-Loading Screen

Setting Up: Suggest and Procedure

Note: If the user's Procedure Off-Loading Suggests are all set to **Yes** in **Security Manager**, a message banner indicating that the user is unable to enter a new loading.

Fields

These are the fields in this region:

- Suggest:** Select the suggest's treatment.

Note: If a loading suggest exists in the data store as a previously saved loading and the user sets a new suggest rule, the user will be able to use the loading suggest on the data set if the **is active** checkbox flag is active. (This is true for all data store sets.)

- Offset:** The number of minutes into the operation that the suggest starts. (For multiple suggest operations see [Loading, Set, Action, Suggest/Offset Procedure](#) on page 40.)
- Procedure:** Select the treatment for the Procedure. Off-Manager checks to see if the suggest is sufficient to perform the procedure.
 - is Procedure:** In the loading screen, you can search for procedures in several ways. In addition to using the treatment, by entering a general character before you search and filtering the results that character on in the Procedure list in the loading screen, you can set a filter of what you can search for procedures. Procedures appear in various loading screen that correspond to the meanings of general characters that lead the column. See [Procedure Search](#) section on the left-hand side.
 - Clicking on the offset at the end of the Procedure row displays the **Modify Procedure Description** screen. The screen shows the currently selected off-procedure value. See [Modify Procedure Description](#) on page 40.
 - See [Customization Procedures](#) on page 40.
- Time:** Shows the average time, in minutes, it takes the suggest to perform the procedure. If the suggest has not performed enough operations to provide a stable average, the default average from the Procedure definition appears.

Note: A loading's average cannot ever change.

Note: The rate measure Time Storage Time calculated from user data. The rate always under actual user time. For example, Patient is used. It also includes measurements regardless of the loading time increment setting. However, the rate average time is the default rate rate loadings are divided by the loading time increment.

Example: For example, suggest 0071 has a calculated average off-procedure time of 40 minutes from user data that multiple users. If the loading time increment was set at 10 minutes the default averaging procedure time would be 40 minutes after a off-procedure is

3D Modeling Screen

Modeling Tool: Suggest and Procedure

are authorized by ICD-10. If the modeling tool is not used, the default authorizing code must be 00. Both of these examples assume that modeling is in the software specified by the administrator.

- **Site** Select the instrument for the area of the patient's body being modeled (e.g., abdomen, etc.).
- **Procedure** Select the position of the patient for the operation, such as left, right, upper, etc.
- **Suggest** Select up to ten suggested and suggest.

Note: If the suggestions are working on the same procedure, all one of the suggestions is an account. It is not all of additional suggest.

Note: If you are setting or modeling modeling with a focus on the, you can change or add suggestions or procedures without altering the supplies. If a modeling's facility is changed or added to suggest or procedure changes, the option to help supplies is not available.

Buttons

Note: More and Less are for authorizing operations in which two or more suggestions participate in modeling. See Modeling Tool: Suggest and Procedure Procedures on page 45.

Procedure Search Options

You can search for procedures from the Procedure field in the modeling screen in several ways. In addition to using the instrument, by entering a special character before your search text, finding the greater than character (>) in the Procedure field in the modeling screen opens a list screen in which you can search for procedures. Procedures appear in columns listing entries that correspond to the meanings of special characters that meet the criteria.

Note: The ICD codes are not procedure codes. ICD codes are diagnosis codes.

Search Type	Character	After the Character
Procedure Description	1	or description
Procedure Code	2	or procedure code
ICD Code	3	or ICD code
ICD Code	4	ICD code
Procedure Code Description	5	or long description

I note that the procedure requires you attach a lot of procedure sheets. That is a whole lot of paper to use for the test.

- **Reconstruction:** It is a single statement or term or basic reconstruction. After the input procedure is performed and the output is known, and then will not be known until after the output has been performed.
- **Execution rule:** Similar to the preceding, it may be stated as to what procedure will be performed, if any.
- **Procedure having authority:** means the example, another rule, CPT code after each a diagnosis of injury or indication of injury is known and is being the correct code. Means that a rule can have authority. Therefore the rule of injury that was identified as indicated in that action, so the first authority, next code has authority. The rule with a highest degree of authority is a medical event hierarchy.
- **the correct rule is better known:** The use of the rule determines the CPT code. The use cannot be accurately determined at the time of establishing. Therefore it is not possible to assign the correct CPT code at the time of establishing.
- **Multiple Procedure Code:** Many common multiple procedure codes are actually combined as one procedure. An example is the "Excisional and debridement." This is done to save the procedure and other coding. Other combined examples include "Suture" codes. Almost all suture have one procedure to represent a "Suture" and they include a code that specifically state all or some. Therefore that the next action that coding an "Suture" is an individual procedure.
- **Sequencing after not indicated by CPT:** is at least not all enough information to select the appropriate CPT code. The CPT procedures are sequential. Although sequencing may have been more useful in some that are going to do. This after the procedure and that all use in the code and after the procedure and use after the code with the. After this an addition is a CPT code is a

CRM will show a list of surges. Filtering to individual users specifically may amount to a great effort that is not really supported.

Authorization Overview

The CRM Manager security system warns you if you attempt to book an unauthorized surgeon for a procedure. This may restrict the warning and book the surgeon for the procedure if you have the proper security rights. See the Security Manager user guide.

Important Note About Authorization Overview

Current CRM Manager functionality is to display all procedures regardless of individual surgeon authorization. With proper security rights, you may choose to restrict user of authorization and book procedures for which surgeons are not authorized.

There is, however, a system option to display only the procedures for which surgeons are authorized. See the Security Manager user guide.

Booking Surgeon Filter By Facility

The current surgeon listing by facility application currently allows for filtering of surgeons and procedures by facility in the booking window when working in a multi-facility environment. When the system flag is enabled the surgeon and procedure(s) drop down lists in the booking process will display only the surgeons and procedure(s) authorized for the current facility. Filtering in the Booking Tab includes the following checklist items:

- Booking surgeon
- Booking procedure
- Procedure(s)

Note: The facility that a surgeon has access to is determined by the user settings for that surgeon. If the surgeon is a member of a group then the individual user facility settings are ignored and the group facility setting takes precedence. See the Security Manager user guide.

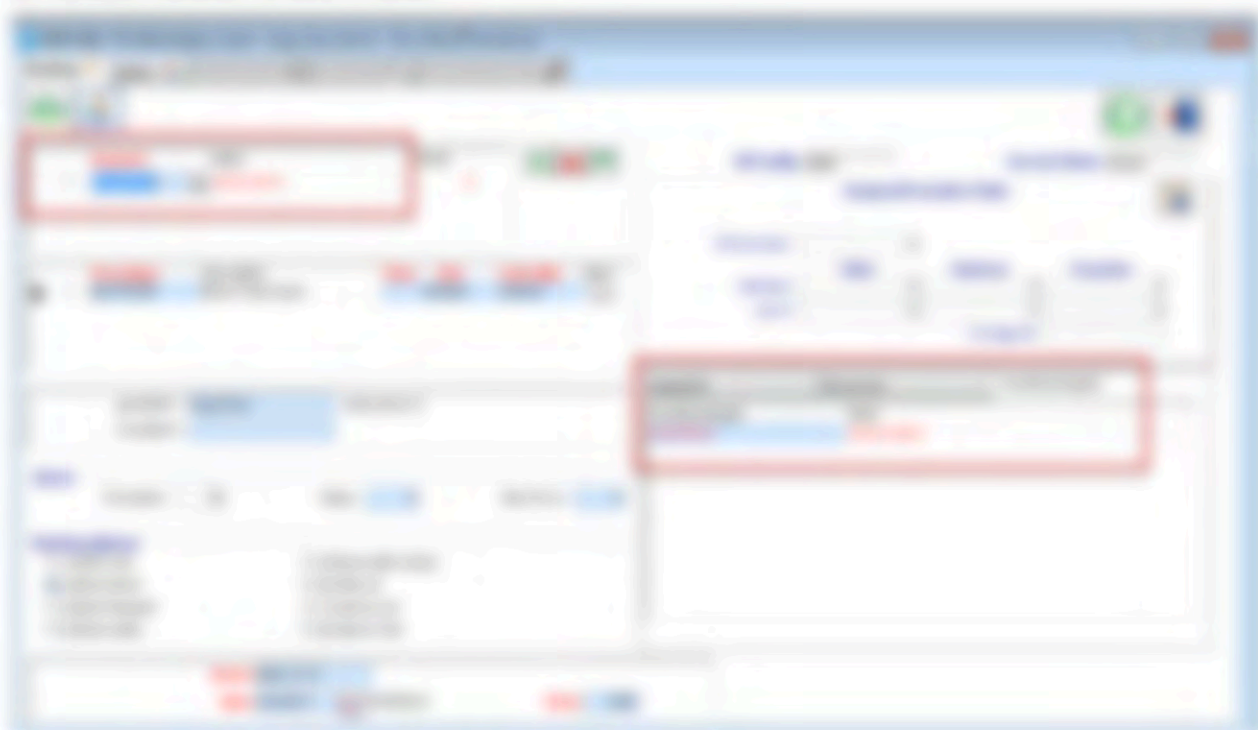
In addition to filtering the drop down for authors, the current surgeon listing by facility flag will cause the system to update the surgeon and procedure(s) that have been assigned to a booking when adding booking information in the Booking Tab. If the surgeon or procedure(s) access rights to the facility have changed the user will be alerted with a message.

The user is also alerted when the booking surgeon or procedure(s) has a facility access restriction when the facility is changed using **Booking Options > Select Facility**. This occurs when current surgeon listing by facility flag is enabled.

Off-Boasting Screen

Alternate Procedure Description

When a loading is displayed that contains a surgen with an active condition the surgen name is highlighted in red. The surgen's surgen and anesthesiologist would also display in red to indicate an active condition should it exist.



Note: The surgen and anesthesiologist will facility settings that is surgen input those of the loading facility and the anesthesiologist is the original surgen or anesthesiologist which can be altered. The description box for surgen and anesthesiologist will display the name with facility active indication highlighted in red at the top of the description box.

Alternate Procedure Description

The user modify the name of the procedure in the current operation is both the Off-Boasting screen and the Case Record screen to accommodate differences in the names between and will also be able to select procedure. The alternate procedure name is the name that appears on printed and loading sheets that are processed through Storage Readings for the operation.

The Procedure description short description for an ingested is "Ingested, Refused" and the long description is "Procedure description cannot ingested." Instead of the surgen.

option is set to a "Short Entry Display," you can change the description of the procedure to the one instance to match the user's preference. The user's preference is then associated with the procedure. Refresh procedure throughout the system for as long as the record of the operation stays in the system.

How to Alternate Procedure Description

The Modify Procedure Description screen displayed in the window displays all of the currently selected CPU codes and I/O procedure codes.

1. Click the option **1** on the right-hand side of the all the row that holds the procedure instance.
The Modify Procedure Description screen opens with a description of the procedure selected in **1**. (The default description is determined by a parameter setting as described in the next section.)
2. Enter the alternate procedure description.
3. Click **OK**.
Your alternate procedure description is saved.
The Description box displays in red to indicate that an alternate procedure description has been entered.

Procedure Name Options

There are several parameter settings that affect how the feature is implemented in your system.

- You can have the Modify Procedure Description box open only when a procedure is changed, and there is not already a modified description, by setting the parm **proc_mod_desc** parameter to **1**.
- The default entry in the Modify Procedure Description box is either the short description or the long description from the Procedure dictionary, depending on the setting of system parameter **proc_desc_defult**.
- IBM Building Blocks the modified description regardless of the parameter settings.
You can change to display the standard or modified description on the following reports by setting parm **proc_desc_display**:
 - **Process**
 - **Workloads**
 - **Workings** (under from Storage Working Options)
 - **Trace** (under from Storage Trace Records) (not from Trace Record screen)

Note: This does not change the procedure description in the Building up. Instead, the description displays in red text if there is an alternate procedure description.

Off-Boarding Screen

Boasting Tab: Multiple Surgeons/Multiple Procedures

Boasting Tab: Multiple Surgeons/Multiple Procedures

You can add multiple surgeons to enter the code at different times to perform parts of the operation. Use **Tab**, **Back**, and **Done** in the Surgeon and Procedure Region to add, remove, or edit surgeons from the operation.

Use Additional Surgeons

Note: This functionality is intended for adding a surgeon working as an additional procedure. If the surgeons are working as the same procedure you should select all one of the surgeons as a resident.

1. Use **Tab**

The Surgeon, Procedure, and notes fields start to enable you to enter another surgeon.

Note: Red text indicates a field is required.

The screenshot shows the Boasting Tab interface. The Surgeon field is highlighted in blue, and the Procedure field is highlighted in red. The notes field is highlighted in green. The Surgeon field contains the text "Surgeon" and the Procedure field contains the text "Procedure". The notes field contains the text "Notes".

Note: The number of minutes is **OffSet** which is the total length of all procedures already entered, including the entry and two other times.

2. Enter the Surgeon, Procedure, and notes information in the same way it was done for the first surgeon. Also perform one of the following actions:

- Enter the other parts of the **Boasting** tab as necessary, then click the **Go** button.



- Click **Tab** to add another surgeon to the operation.

Use Multiple Surgeons

- Use the scroll bar to select the surgeon whose procedure you want to add.
- Click the **Boasting** tab as you would any other boasting.

Note: If you change the procedure title for a building, do not forget to adjust the other titles of the suggestions associated to it after this.

Add Additional Procedures

1. With the cursor in **additionally** for the first procedure, press the **Tab** key. Another row of boxes appears in the procedure section.
2. Fill in the new procedure just as you did the first.
3. Repeat these steps for each procedure you want to add to the suggestion.

Move Suggestions and Procedures

1. Click **Move** in the Building tab.
The **Move Suggestions and Procedures** window appears.
2. Highlight a suggestion or procedure and drag the mouse button pressed as you drag the suggestion or procedure to another place in the order.

Note: You can only drag suggestions and/or procedures down the list, not up. To move a suggestion or procedure up the list, you must drag the entire down it down to a position below it on the list.

3. Click **OK**.
The new order is saved.

Note: You can change the order of the procedures for a suggestion, but you cannot move a procedure to a different suggestion or a suggestion to a different procedure.

Delete a Suggestion

1. Use the scroll bar to select the suggestion whose building you want to delete.
2. Click **Delete**.
3. Click **Yes** to delete the suggestion and further associated procedures.
The suggestion is removed from the procedure.
4. Ask another student who understands responsibility, or reassure that they have been added to association with the suggestion you deleted, regardless of whether they were added manually or automatically.

Storage Tool: SurgeonProcedure State

The SurgeonProcedure State page shows data to help you understand how long it will take to complete the procedure.



Overview

When your IBM Storage system is first activated, all steps in the "Threat" section of the SurgeonProcedure State page, as well as other and non-data steps, come from the default state built in the IBM Storage Procedure database.

For each surgeon-procedure combination, after a pre-configured number of steps have been performed and actual step records are created, you can calculate surgeon-specific average times and have those times default into new loadings.

The result is that if you have a surgeon perform certain procedures faster or slower than the default, the default SurgeonProcedure State is replaced by the surgeon's actual average time.

Complex Cases

In such the complex cases, for each combination of multiple surgeons and procedures, after a pre-configured number of historical cases have been performed the system can calculate surgeon-specific average times which get default into new loadings.

If statistics are not available for a complex case combination, the average times for each procedure/surgeon combination are obtained and those average times are combined in the "Threat" section of the loading.

If statistics are available for a complex case combination, two buttons appear in the SurgeonProcedure State section.

[OH Building System](#)

[Building Tool: Surgeon/Procedure Stats](#)

Note: There are several options for calculating Surgeon/Procedure Stats. See the Security Manager user guide.

Fields and Buttons

Field/Button	Description
Complete Avg	Button only available for complete cases for which statistics are available. Displays statistics for the whole complete surgeon/procedure combination.
Single Avg	Button only available for complete cases for which statistics are available. Displays statistics specific to the selected surgeon and procedure.
# Procedures	Shows the total number of times the surgeon/procedure combination has been performed.
Standard	Only shown for single cases or when Single Avg is selected for a complete case. Shows the standard being, Technique and Procedure times, as defined in the Procedure Dictionary.
Cost \$ It is a number configured by user manager	Shows average being, Technique and Procedure times for the top 5 documented cases for the surgeon/procedure. Note: Document cases, complete cases (more than one procedure), and incomplete cases are not included in these averages.

Off-Booking Screen

Booking Tab: Equip/TPM, Resources, and Anesthesiologists

Icon/Action	Description
	Press this icon from your procedure code card to generate the schedule for the surgery/procedure combination. The data includes the date, patient, start and finish times, and time intervals. With the proper security access, you can designate some cases as Buffer, which are cases that are not counted in computing Surgeon/Procedure Rate. Buffers are typically procedures that have exceptional circumstances and should not be counted in the average. Manually designate a procedure case as a buffer In the Buffer column, change the Y to N in the upper row than case 00. The case is permanently removed from the list and its underlying times are removed from the average calculation.
	Buffer only available when Complete flag is selected. With complete cases, if the you add the times for a procedure, the values shown in the Time section are summed based on the date and using simple addition of the individual times. An N indicates for the complete case combination date not available. You can reset back to the complete average statistics by clicking this button.

Booking Tab: Equip/TPM, Resources, and Anesthesiologists

Press the **Equip/TPM, Resources, and Anesthesiologists** button during the operation.

Equipment	Resources	Anesthesiologists
Surgeon/TPM: 10000	10	100
TPM: 10000	10	100

Equipment, Resources, and Anesthesiologists select is from the Procedure defaults. They can be edited for the particular procedure without affecting the defaults in the Procedure defaults.

- To view **Equipment and Resources**, **Resources**, or **Anesthesiologists** entries, click on the corresponding tab.

Off-Budget Screen

Booking Tab: Facility Information

- To insert, edit, or delete entries, click on the corresponding tab, then right-click anywhere under **Supplies/MS Resources**, and **Bookings/Equipment** to open the menu and select **Book**. Use the **Preference** (not **Booking**) **Book/Cancel** button in the **Off Manager Configuration** field.
- Click on the **Off** and **Facility** values to set the number of requests into the category that the equipment is needed (Off) and the length of time it is needed (Facility).
- To edit, copy, or paste an existing entry, click on the corresponding tab, then right-click in the field you want to modify and make the appropriate selection.
- To add an existing entry, click on the corresponding tab, then click in the field you want to add and make a new selection from the drop-down list, or enter a different value.
- To reset the equipment and resource fields to their original default values, click **Refresh**.

Booking Tab: Facility Information

Use the Facility Information field to confirm the facility where the booking is taking place. This information is useful when multiple facilities share the same Off Manager address to avoid booking the patient into the wrong facility.

Off Facility:	Facility Name:
------------------------------------	-------------------------------------

- **Off Facility**: Shows the facility you are booking into.
- **Current Status**: Status: Cancelled etc.
- **Refresh**: Click to recalculate the time statistics after entering values in **Supplies/Preference** field.
- **No request**: Click to book the surgery.



Booking Tab: Scheduling Options

After entering the required surgery and procedure information, use the Scheduling Options region to select a booking method.

Off-Boarding Screen

Boarding Pass Scheduling Options

Fields

- Boarding Pass:** Shows the boarding pass number of the procedure's estimated location.
- Procedure:** Shows the estimated location of the actual procedure. This comes from the Surgery and Procedure report and shows the total time for all procedures in the surgery.

Note: The system changes the time when needed, you must change it in the View field in the Surgery and Procedure report at an individual procedure level.

- Surgery and View Board:** Shows the standard surgery and view board times for the surgery. The numbers here are the surgery times and view board times of any of the procedures in the surgery. In other words, if you are doing three procedures with surgery times of 15, 20, and 30 minutes, the default surgery time is 65 minutes. There can be either a adjust the total time the user is needed.

View Boarding: This user may wonder whether the surgery time of procedure and surgery is entered in the first "surgery" tab in the report. The response is no, it is not. The surgery time is the time of the day for that user that has a 15 minute surgery time. Should the surgery be entered in the first tab and in the report in the 15 minute surgery time? This is because the user is not aware of 15 minutes, but the first procedure should be scheduled to start at 1:00, which makes the surgery time 1:15. The system has surgery times of 15, 20, 30, and 45 minutes and times of 1:00 in the estimated report for surgery. If a surgery block is included, and surgery and view board times are included, it is best to add the surgery in the first block to make sure it is included.

- Other Fields:** The fields that display at the bottom of the Scheduling Option are determined by an administrative parameter setting maintained in the Off-Boarding Configuration Profile and by the boarding method you choose. If the parameter is activated the Surgery Pattern Report is on, you see all of the fields following fields, regardless of which of the boarding options, such as Boarding and Boarding, is selected. If the parameter is activated the Surgery Pattern Report is off, you see the Boarding Pattern field only. If you select the Boarding boarding option, all of the fields are managed with from the Boarding Report are displayed.

- **Method as Priority:** This is an automatically generated value coming from the first-party Suggest Future Requests through an interface that indicates the urgency of the user request to other users. If the Suggest Future Requests user determines a value quickly enough, the priority appears before the user is asked. If the Suggest Future Requests cannot assign a value immediately, an error message appears, and the Suggest Future Requests continues working to determine a value once CRM Manager is not running. Whether the field is selected depends on whether the Suggest Future Requests has sent a value for it. After the value that was sent appears in the field, it is no longer editable.
- **Resource Name:** The name is automatically generated. If the Suggest Future Requests can determine a value quickly enough, the name appears before saving. If the Suggest Future Requests cannot assign a value immediately, an error message appears, and the Suggest Future Requests continues working to determine a value once CRM Manager is not running. Whether the field is selected depends on whether the Suggest Future Requests has already sent a value for it. After the value that was sent appears in the field, it is no longer editable.
- **Suggest as Priority:** The priority assigned to the user at the time of the booking. This value is the field is always selected.

Booking Method Radio Buttons

The radio buttons represent each of the six booking methods. Select one of the methods and enter the date, month, and the number of days from the user date to search as appropriate. The generated booking date and month the number of days is otherwise that is generated can be found. If the Suggest Future Requests is implemented, you will not be required to enter a date and time.

The following table maps each booking method to the Scheduling Options region of your CRM Booking screen.

Book First Booking Method

Schedule a reservation using the Booking link.

1. Enter the following information to reserve your search:
 - Number date to show on the Booking link
 - Number of days to search
 - The month you want to search
2. Click the **Book** button to open the Booking link. See Booking link, Tab on page 23.



Off-Booking Screen

Booking Tool - Rescheduling Options

Best Practice: The Book Direct Booking Method is the one that most recommends for normal booking screens.

Book Direct Booking Method

These steps allow you to schedule a reservation without going to the grid.

1. Enter the date and time you want to book.
2. Click the **Book** button.



- If no conflicts are found, the reservation is booked.
- If conflicts are found, Off Manager tells them and gives you the opportunity to override them. If you are authorized to do so.

Book Request Booking Method

Request a booking is used when a scheduler is not authorized to override a conflict. Requests do not have a date, are not checked for conflicts, and do not appear on the booking grid. Requests must be converted to active bookings in order to be used to create new records or to update on the booking grid. **Use Tools > Manage Bookings > Tools > Manage Requests > manage requests**, or to convert them to active bookings.

1. Enter the date and time you want to book a request.
2. Click the **Book** button.



A confirmation message states the booking is saved as a request (See Screen Shot on page 10).

Reservation Booking Method

Reserve is used and time. Unlike requests, reservations have a date and time and appear on the booking grid. Reservations are not checked for conflicts and must be converted to active bookings in order to be used to create new records. **Use Tools > Manage Bookings > Tools > Manage Requests > manage requests**, or to convert them to active bookings.

1. Enter the following information to refine your search:
 - Search date to show on the Booking Grid.

- Number of days to search
- The rooms you want to search

1. Click the **Go** button to access the **Booking Search** page. **Go** button is located on the right side of the page. (See screenshot below.)



Reservation Direct Booking Method

Follow these steps when you to make a reservation without going through the booking page. (See Reservation below.)

1. Enter the room and time you want to reserve.
2. Click the **Go** button.



- If no conflicts are found, the reservation is booked.
- If conflicts are found, CRM Manager lists them and gives you the opportunity to override them if you are authorized to do so.

Wait List

Follow these steps to add a booking to the wait list.

1. Select a Wait List Priority.
2. Click the **Go** button to add the booking to the Wait List with the requested priority.



Search List

Search from a list of available rooms and times using the steps below.

1. Select date range, time range, month, and days of the week.
2. Click the **Go** button to access the **Search** page. **Go** button is located on the right side of the page. (See screenshot below.)

Off-Booking Screen

Booking Patient Tab Overview



Search Grid

These steps allow you to schedule a procedure from the Booking Grid. This is similar to Book Grid but allows more specifications.

1. Select a date range, time range, rooms and days of the week.
2. Click the **Search** button to access the Booking Grid. See Search Options below Off-Booking Grid.



Search Options

From Search Grid or Search Grid from the Scheduling Options Region to open the Search Options screen.

Date Range				Time Range			Room
Start	End	Start	End	Start	End	Room	
7/7	7/7	7/7	7/7	8	7	7	Room

- Enter the Date and Time ranges and select the days of the week and Rooms to search.
- For Book Time only, select to search only the open book time.

See the Booking Grid/Room Scheduling section in the IIF Manager Configuration Guide.

Booking Patient Tab Overview

The Patient tab has two modes: **Basic Patient Information and Forms**.

- **Basic Patient Information mode** is displayed when you select a booking. It provides demographic fields for you to search for a patient in the IIF Manager booking system or add a patient. You can also use this mode to create a new patient in the IIF Manager booking system. After you select a patient for the booking, you can no longer edit the basic patient

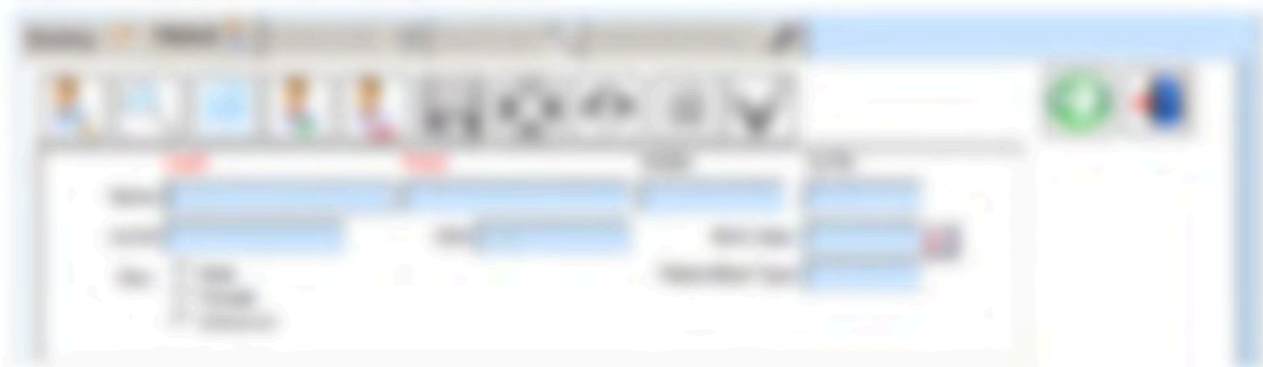
MR Imaging Screen

Display Patient Test Overview

information that you can still access if it is a scan-only mode. (The exception is the PatientID tab, which you can still edit after you have selected the patient.)

- **Header mode** is displayed automatically after selecting the patient for the Imaging Patient form, and is used on the right and the left is selected and displayed by default. They are used to collect information about the patient and the details of the particular testing. (Fields are configurable; they differ from one hospital to the next.)

Basic Patient Information Mode

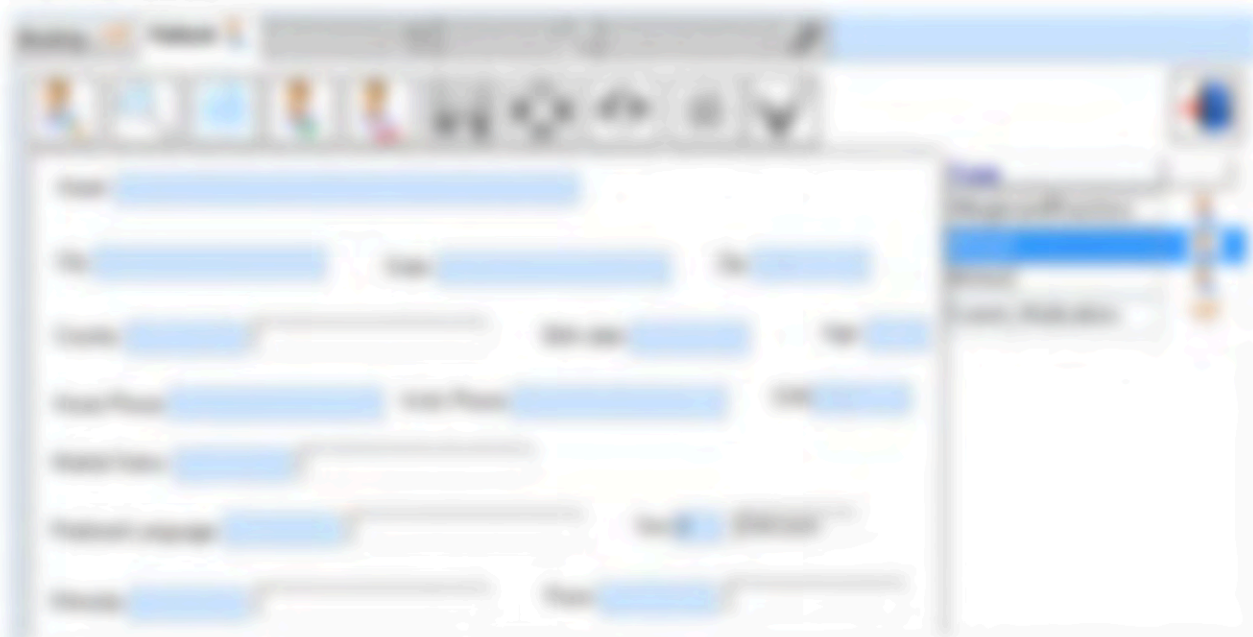


About the Bulbs

Bulbs can be used to add comments and they are generally set into two types:

- **Diagnosis** is for diagnostic information, such as MRI, CT, or X-ray.
- **Reference** is for notes the patient normally gives to, such as test, study, or results.

Forming Results



Forming results appear automatically after selecting the patient and filling in the main patient for a test loading. It can also be activated when the Patient tab is in a Basic Patient Information mode.

Forms are configured by your template and may be related to the patient  or to the particular testing .

Open the Forms

- Click the **Show Forms** button  on the Patient tab.
- Or: **Test Loading Options** > **Show Forms**

Forms use the Patient and Testing user-defined screens.

For information on setting and creating forms for your site, search for "User Defined Screens" in the Off-Boarding Configuration mode.

Note: An ellipsis (...) at the end of a field indicates that the text is too long to be shown on the form. You can click the field to see the full text. Note also that any content underneath of the form will only show the truncated text, not the full text.

Patient Tab Toolbar Buttons

Note: Buttons are disabled and inactive if you do not have the appropriate access to use them.

The available buttons depend on the mode.

Patient Basic Information Mode



	Search the CRM Manager database
	Search the CRM
	Clear the search field
	Create a new patient in the CRM Manager booking system
	Remove the last patient whose form was opened
	Save changes to Patient basic information (Available when viewing the tab after the patient has been selected.)
	Cancel while creating a new patient
	Clear the search field when viewing the search field

	Return to Patient mode
	Save the currently selected patient to the booking

Patient mode



	Return to Basic Patient Information mode
	Change the Patient in the booking
	Ask Patient to reconnect after the booking has been confirmed
	Link Account Number
	Send message
	Schedule a 100 test

Change patient is described next.

Other features are described later in this chapter.

Changing the Patient in a Booking

In the following procedure, the initial patient in the booking is referred to as the old patient. The replacement patient is referred to as the new patient.

Change the Patient in a Booking

1. Open the booking for the old patient.

2. On the Patient tab, click the **Change Patient** button.  or click **Booking Options > Change Patient**.

3. Search for and select the new patient using standard search methods.
The **Change Patient** screen appears, showing both old and new patient data for verification.



Change Patient

Old Patient

New Patient Name

Accession ID

DOB

MRN

New Patient

New Patient Name

Accession ID

DOB

MRN

Search for:

☒ Patients are the same - change information on the patient

☐ Patients are different - use the new patient's changes and information on the test

Cancel **Save**

4. Select one of the two options in the lower part of the screen. The text in the screen describes the consequences of each option.
 - **Patients are the same**: Old and new patient changes and information are combined.
 - **Patients are different**: Only the new patient's changes and information are used.

OH Monitoring System

Patient Tab: Patient Search Options

1. How Many Patients

Patient Tab: Patient Search Options

Search Options

These recommendations help you search for a patient using different methods in the order shown below until you find a match.

1. Search the OH Manager database. Patients in the OH Manager database have previously had surgery at your facility.
If the patient is not found, OH Manager asks if you want to do an HSA search.
2. Search the HSA for patients who have been previously admitted to your facility but have not had surgery there in the Prior system.
If the patient is not found, OH Manager asks if you want to do a Secondary search.
3. The Secondary Search option is offered when OH Manager cannot find a match in the database using the criteria for the HSA search. The Secondary Search looks for alternative combinations that may not exactly match what you put in the **Name** box but are close.

Example: Having a "last" name being a patient's primary, last, and family.

Note: Only if you cannot find a match with the previous methods, should you create a new patient record which gets added to the OH Manager tracking system.

Search Option Notes

- The information you must key in to perform a patient search is controlled by a setting in Security Manager. Recommendations are the use of the following:
 - Exact name plus DOB date of birth, or unit ID
 - Partial name plus DOB date of birth, or unit ID
 - No restrictions, meaning that you can enter partial name, DOB date of birth, and/or unit ID
- Prior you choose the **New Patient** button and look up OH Manager database search and HSA search have been conducted. The System makes it more difficult to inadvertently add duplicate patients to the database. Contact the Prior Client Center for more information.
See the Security Manager User Guide for more details.

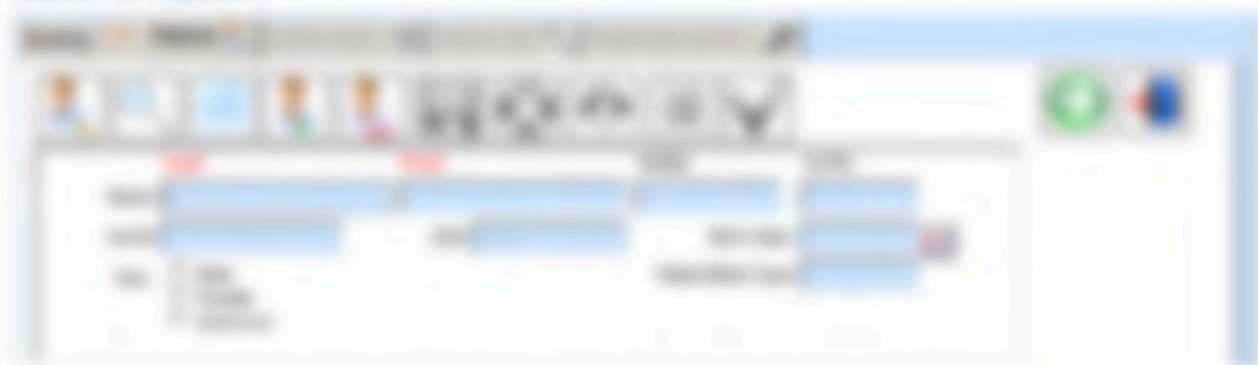
- See Booking and Case Search details on page 22 for an explanation of what happens in the system when you choose various options.

Patient Tab: Patient Search Details

This section gives detailed instructions on how to search for an existing patient or enter a new patient into the OH Manager booking system.

Recommended Search Methods

Search for a patient



- Enter your search criteria in the fields provided. You do not need to complete all fields.

Best Practice: The fastest and most reliable search method is to enter the patient's full Name.

- Click the **Patients Search** button  to search the OH Manager booking system in the OH

Search button  to search your OH system.

The bottom of the screen lists the patients who match your criteria.

- Double click the patient's name or select the patient and click the **Select** button .

The **Patients** pop form opens. The first form is displayed.

- Complete the form(s).

IBM Monitoring System

Monitor Your Platform Support Details



- Click the **View** button  to view the Platform support information.

Note: A new platform is the IBM Manager monitoring system.

Note: Before entering a new platform you should be aware the platform is not already in the IBM Manager database of the IBM system.



- Click the **New Platform** button .



- Fill in all the new platform information, then click the **Save** button . The Platform will now appear in the system. The first time is displayed.

The screenshot shows the IBM Manager monitoring system interface. At the top, there is a navigation bar with several icons. Below the navigation bar, there is a form for adding a new platform. The form contains several fields, including a name field, a description field, and a status field. The status field is currently set to "New". To the right of the form, there is a sidebar with a list of platforms. The list includes a table with columns for Name, Description, and Status. The first row in the table shows a platform named "New Platform" with a status of "New".

- Complete the new platform form.



- Click the **View** button  to view the Platform support information.

Patient Tab Form

This is a screen to be used for a procedure in Off-Boarding. This is for personal and building medical data that is entered into the Patient tab. In Forms mode, the Patient tab is made up of one defined form in which you enter with and other patient information.

Note: When Off-Boarding is opened from either Phys Manager, another module of Phys Performance and Critical Care, Off-Boarding opens the tab to show some preoperative patient data.

Note: The user enters the form instructions data in the patient form, which includes Time and Time and Time and Time can be entered with data from Phys Manager. When a user wants a screen from a building that includes form instructions data, the user must include the form instructions data. These data are with Time. Items in the data can include operational control, about diagnosis, and insurance status. Radiographic materials, control agents, and data appear in the same format as instructions.

This illustration shows the Patient tab opened in a screen form. However, it probably does not tell exactly the way form of your facility because all content in the Patient tab are individually customized for each facility.

The screenshot shows a software interface with a top toolbar containing various icons. The main area is a form with several input fields. On the right side, there is a sidebar with a list of items, including 'Patient', 'Phys Manager', and 'Phys Performance'. The form fields include text boxes for 'Name', 'Address', and other patient details. Some fields have dropdown menus or checkboxes. The overall layout is typical of a medical or administrative software application.

User-Defined Screens

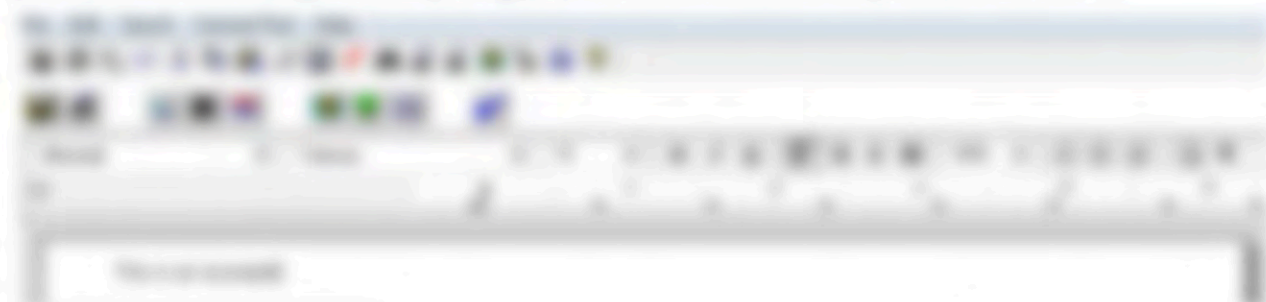
iM Storage stores patient data with associated and procedural or user-defined screens or forms. These user-defined screens include the two types of forms:

- Patient forms:** Patient forms contain patient data that is not specific to the current test, such as the patient address. They are identified on the user-defined screen by the following icon: . Data entered into patient forms stays with the patient from booking to booking. If you are booking a patient who already has a record in iM Storage, further patient forms will be automatically, and not be updated to reflect changes.
- Booking forms:** Booking forms contain booking-specific data that is different from test-to-test, such as procedure, region, appointment type, etc. Booking forms must be filled in the next test case. They are identified on the user-defined form by the following icon: .

Using Word Processing Fields

In addition to entering free text text, if you are using the Free Word Processor, you can use the Microsoft Word icons to insert pre-written text into your document. If you are using Microsoft Word as your word processing tool, the pre-set text icons is not available.

iM documents can be set up to use defined screens to be associated with particular body images or subgroups of captured text. However, a document need not be set up for defined text or pictures; you can use the Microsoft Word icons from any document at any time to insert pre-set text or add to your document or change the body images and/or defined text already associated with it.



The Microsoft Word interface for word processing allows you to add user-defined word processing fields within a booking or case record.

Note: Microsoft Word requires Word to be installed in order to insert pre-set text messages when opening free text.

See the iM Storage Configuration Guide: General Test & Body Images.

Required Fields

Fields on the test order form in the Binding screen or in test result screens can be mandatory or recommended.

- Mandatory:** Based on the default setting for the application parameter `dlb_is_required`, you must enter data into the field before you can proceed.
 - If the `dlb_is_required` `all_fields` is set to "Y", required mandatory fields appear on the screen with white text against a red background.
- Recommended:** It is recommended that you enter data into the field, but you can proceed without it. If the `dlb_is_required` `all_fields` is set to "Y", recommended fields appear on the screen as black text against a white background.
- Note:** You can leave the field blank.

If you try to leave a field or enter a test result before filling in the Mandatory or Recommended field, the Required Fields screen appears, listing which Mandatory and Recommended Fields are blank.

If you are missing a field of the following type, take the action indicated:

- Mandatory Field:** Click **Enter Response** and complete the field.

Note: If application parameter `dlb_is_required` is set to "Y", `Default` is active, and you set the mandatory field, although this does not recommend the practice.

- Recommended Field:** Take one of the following actions:
 - Click **Enter Response**, then complete the field.
 - Click **Default** to leave the field empty.
- See the Security Manager User Guide.

Standard Fields and Groups

Your Binding form may contain three standard fields and/or groups. These fields and groups inherit Procedure Description, Position, and the information from the **Binding** tab on the Patient set to up to four segments. You can edit the data in these fields without affecting the data in the **Binding** tab or Procedure Dictionary. That is, any modifications you make apply only to the current Binding.

Example: The description from the Procedure Dictionary is "Vaginal hysterectomy." On the Patient set, you modify it to read "vaginal hysterectomy w/ postoperative hysterectomy." In your test order screen.

It is important to note the following:

- These fields on the Patient set can only be modified manually.

Off-Booking Screen

View Booking Data

- After you have modified the default information, your changes remain until the original procedure information on the Booking tab has been modified or deleted.

Note: The set of user fields for Case Records, Case Record History, Patient Data, and Booking Data user-defined fields can be filtered by Standard, With Standard, Custom, or User-defined, and their master (Custom) fields. If any of these specific field types do not work, the selection may have not changed.

In this example, the first master is program code is called "Test, 00, Case Booking, 000" but your master may use a different name.

View Booking Data

The Booking Data is a read-only version of the **Booking** tab that is used for viewing or tracking and getting form information. Click on any entry in the Form section to view the contents of the associated form.

You can get to the View Booking Data screen from a number of places within Off-Booking. If administrators have set permissions for you, you may see the built-in immediately in front of the data in a list .

This icon indicates that the field value was changed and saved more than once. You can click the built-in icon to see the Field-used built-in screen for the field. The Field-used built-in screen provides information about changes in the values in the field. For more information about the Field-used built-in screen, see [Accessing History](#).

For multiple fields, the built-in appears in the upper left-hand corner of the group of fields. The built-in for these fields are indicated by changes and saving of the same data, but it can also appear where two fields were entered at the same time.

The screen uses the Field-used built-in for an extended booking, and showing the built-in as an extended booking function is message editing this. The Field-used built-in is a pattern of an extended booking, not an exception from the Patient Form, but it displays only the pattern name, and all of the other fields are blank.

If two users are working with fields in the same form, changes made by one user are not shown by updating the built-in or making the user visible to the other user until the other user saves the form and returns to it.

Similar Booking Search

Sometimes, a patient is inadvertently double-booked:

- The patient is scheduled for the same surgery on the same day, but in different rooms.
- The patient is scheduled for the same surgery on different days.
- The patient is scheduled for different surgeries within a few days of each other when the procedures could have been combined into the same surgery.

The Similar Patient Booking Search screen solves this problem by enabling you to see bookings for patients with similar names or with dates who have been booked for procedures within a certain number of days before and after the booking you are making. Then you can determine whether they are the same patient and, if so, whether to continue the booking.

If patients with similar names or with dates are found, the Similar Patient Booking Search screen appears during the booking process after you have entered the patient's name, booking date, and site. (The path is shown that occurs repeatedly in the search method you are using.)

There are two ways to set up parameters to find similar bookings:

- Similar Booking Parameters screen.
- Similar Booking screen.

Similar Booking Parameters Screen

To set up or change default parameters for all operations, use the Similar Booking Parameters screen, which is found in **Booking Options > Similar Booking Parameters**.

- You can change the range of days to be searched in **Similar Search Days** only. This number is the number of days with before and after the operation booking date, and includes the surgery date.
- **Booking Notes** enables you to change the type of similar bookings you want Off Manager to search for. Choose **All** to search for all types of bookings.
- **Use Match All** allows you to make the patient's date of birth an element of the search. When **Use Match All** is selected, the search results show bookings for patients with the same name or date of birth. When **Use Match All** is cleared, the search results show bookings for patients with the same name only.

Off-Booking Screen

Refreshing Drop-down Lists

Booker Booking Screen

To change parameters after Off-Booking has found earlier bookings, use the fields in the **Booker Booking Parameters** section. (See **Booker Booking Parameters** section on the previous page.)

- You can change the range of days to be searched in the **Booker Search Days** entry control. This number is the number of days both before and after the original booking date, and includes the original date.
- You can change the name of the subject you are searching for by entering a different name in the **Name** control. This feature is useful if you suspect that the same subject may have been booked under a different name.

Example: If you find that subject was booked eight days later previously booked as Joseph Smith Jr. (J.S. Smith), you could enter the name "Smith, J." to find all occurrences of the name.

- After changing the date range and/or name, click **Search** to do a new search. Off-Booking will return all matches for the name and the date range.
- You can click on any column header to sort the list by that column.
- Click **Continue** to go ahead and make the booking.
- Click **Cancel** to cancel the booking process.

Refreshing Drop-down Lists

Menu Tools > Refresh Dropdowns

You may need to add or change a dropdown in table entry that supports a drop-down list while you are working in the Off-Booking screen or in the **Supervisor/Bookings/Reports, Procedures, or Booked** screens.

Example: The procedure you are booking with for a series of assignments that is set in the **Assignments** dropdown. You can add the assignment to the **Assignments** dropdown. Then go back to the Off-Booking screen and use **Tools > Refresh Dropdowns** to get it in the **Assignments** drop-down list.

Without leaving the Off-Booking screen or the **Supervisor/Bookings/Reports, Procedures, or Booked** screens, you can update any dropdown in table on the Workday page, make the dropdown available or change. Then use the **Refresh Dropdowns** entry on the **Tools** menu to update the drop-down list to reflect your changes.

Note: inactive entries in the document do not appear in the drop-down fields for new bookings or user records. The only exception is when a user applies the filter in Microsoft Dynamics for a pre-existing booking that already has inactive entries saved.

Booking Grid Tab

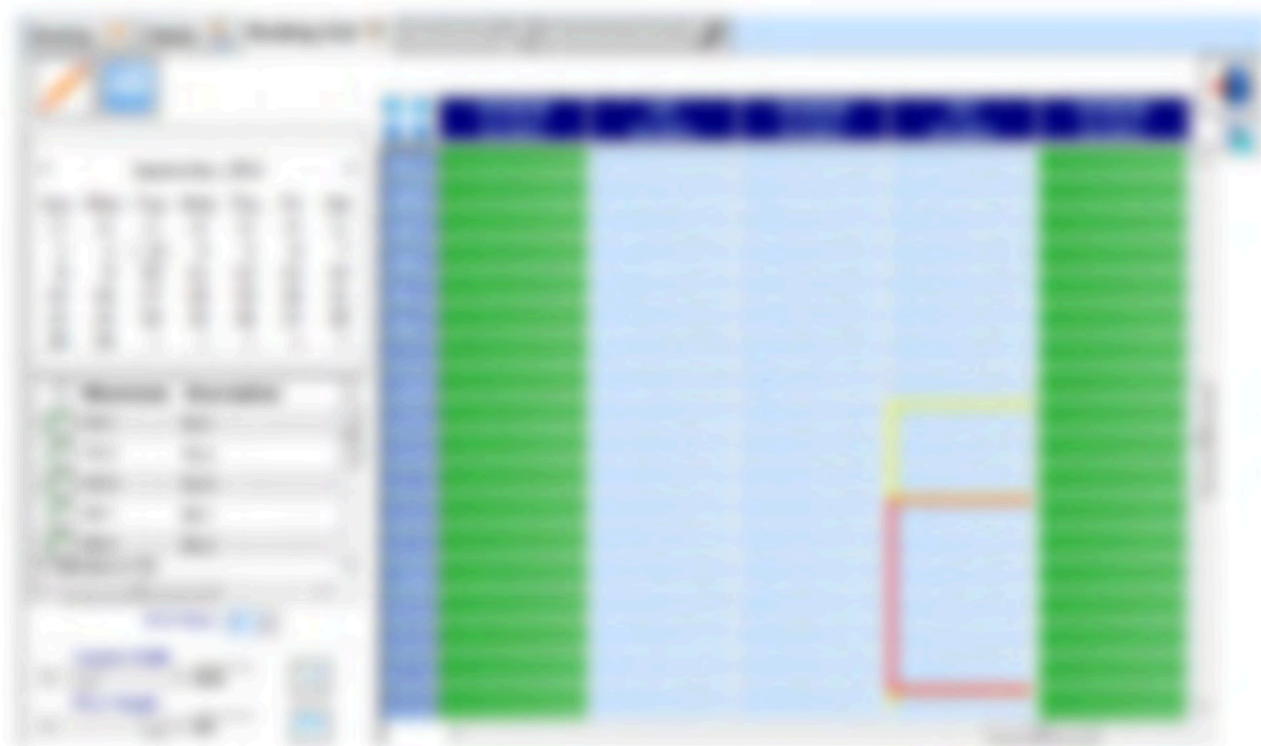
The booking grid lets you view the CRM schedule at a glance.

Use the Booking Grid for the following purposes:

- View multiple events and days for available slots
- Book requests
- View existing bookings
- View conflicts

The following sections explain important **Booking Grid** tab items:

- [Schedule a Booking](#) from the Booking Grid on page 23
- [Cancel Booking for Booking](#) on page 23
- [Appointment Change Fields](#) on page 23



Building First Step

The time intervals in the Building First Step are set up by the time of installation time. The installation can have 15, 30, or 45 minute intervals.

Expand/Contract Feature

After entering the rooms you want to show, you can expand the grid by clicking on the top of the time column.



To collapse the grid, right-click on the top of the top of the time column.



Booking Grid Information

Information in the Booking Grid is organized in two levels:

- Status:** OIL Manager uses colors to indicate work statuses, such as open, closed, back orders, and more already booked. Many of these colors are user-definable.
- Tab:** Each screen information about times that are already booked, such as surgeon, procedure, patient, etc. Tab is also user-definable.
- Booking Grid Comments:** are indicated by double arrows (↔) in a cell on the grid. You can double-click them to add, edit and delete comments.
 - An asterisk (*) next to a surgeon and/or procedure comments indicates that there are multiple surgeons and/or procedures involved in the operation.
 - The Status icon at the bottom of the main screen frame also carries key information for the cell your cursor is over, including the text of the associated comment if the cell your cursor is over contains a double arrow.

Grid Colors

The following table shows the default color schemes used by the booking grid and associated steps to new modifications. For color that are representing the existing patient color scheme is associated. For information on changing the booking grid colors, see the OIL Manager Configuration Guide.

Note: These are the defaults. Your site may use different colors.

Comment	Default color	
Available Time	Yellow (H&B 200, 200, 0)	
Closed room	Pink (H&B 255, 190, 190)	
Booked	Purple (H&B 120, 120, 190)	
Back order	Cyan (H&B 120, 255, 255)	
Single conflict	Orange (H&B 255, 120, 0)	
Multiple conflicts	Teal (H&B 0, 120, 120)	

Note: Depending on how your system is configured, certain bookings may have a color different to that defined in the color scheme. For example, the color of a booking may depend on the procedure category or procedure type set for the booking. It may also depend on the setting of the particular field in a booking form. In the configuration, the field is either booking, color, and it may be named differently in the form.

For more information, see the OIL Manager Configuration Guide.

Off-Budget Screen

Building Data Tab

Room Selection Methods

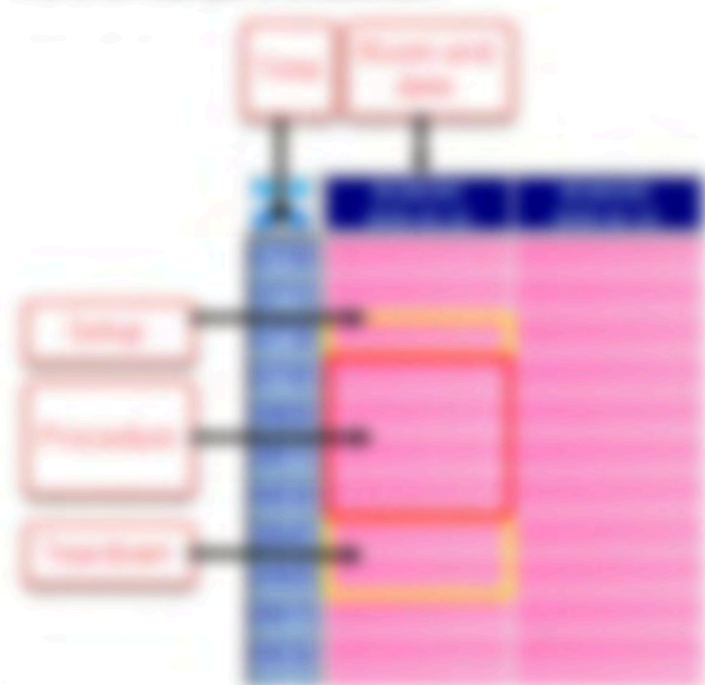
The bar in the room will help the rooms in which you can select rooms. Room selections are indicated by placing a check mark inside the room name in the list. You have several options for selecting rooms.

- Click **All** to select all the rooms.
- Click **None** to remove all the room selections.
- Click **Specific Room** to select all the rooms.
- Select the boxes in the right of the rooms to select specific rooms.

Bookmarks

You use the Off-Budget bookmark to track a room in the Building Data. A bookmark represents a room's length, including entry and departure times.

This is an example of a bookmark.



In the example you are tracking Room 10000000.

- **Date** February 10, 2010
- **Room** 10000000 (with room number)

- **Procedure:** 10 minutes
- **Setup time:** 10 minutes
- **Test time:** 10 minutes

Schedule a Meeting from the Meeting List

1. Using the calendar on the left side of the **Meeting List** tab, click the first day you want to display your schedule for. The default is the date selected in the Meeting tab. If no date was entered, the default is the current date.
2. Select the name or team group that you want to display from the list on the Meeting List. The defaults are the names entered in the Meeting tab.

Note: The multi-select capabilities of team groups from all facilities appear in the **Selected Team Group** drop-down list. However, if you want to select team groups from a facility, click from the list you are currently in, you must change facilities using Meeting Options – Select Facility.

3. Select the # of days of the name schedule you want to display.

Note: The default is a number selected in the Meeting tab. If no number was entered, the default is 7.

4. Click the **Removable** button.



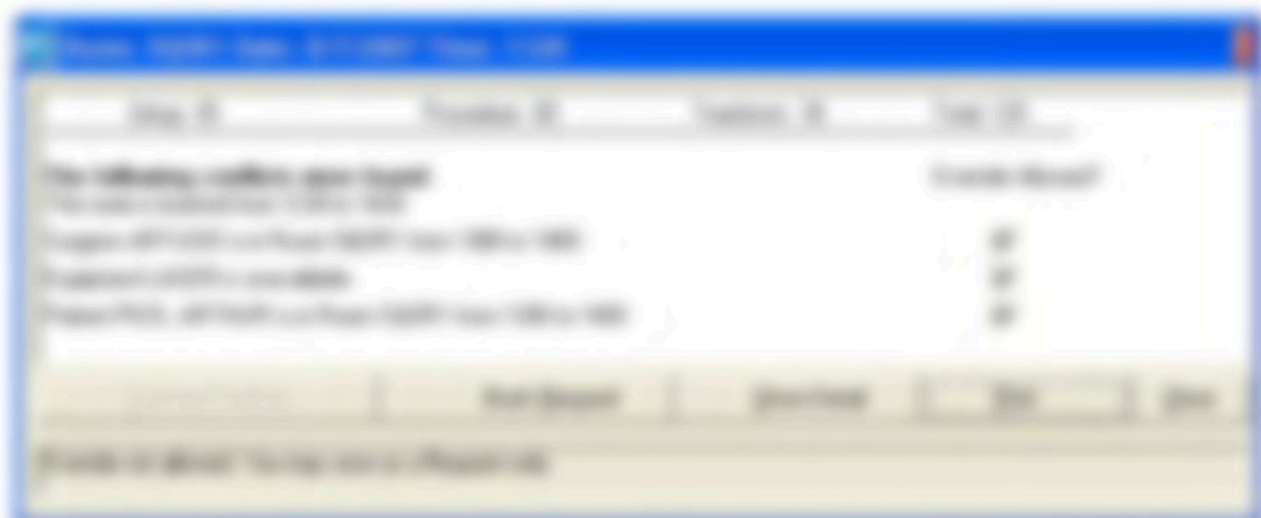
Removable

to double-click the date you selected in step 1.

Note: You can use the double-click feature at any time to easily view the first date of the Month.

The names and dates you selected appear in the Meeting List.

5. Move the mouse pointer over the Meeting List.
The Off-Manager treatment appears under the pointer.
6. Move your treatment to an open block.
7. Right-click and select **Book Here**.
8. The day you want to book is checked for conflicts. If no conflicts are found, the booking is saved. Otherwise, a screen comes up listing the conflicts. You can either cancel the conflict you add to or the schedule with the appropriate access rights, book it as a request, or close the screen and book into another week or day.



Note: When the boating system administrator is asked to print a boating certificate and the log is not generated, the system will prompt the user before sending the email. See the Off-Boarding Configuration Guide Boasting Boat Log Settings.

Right-click Menu

The options change when you right-click on the Boasting Boat, depending on where your cursor is on the grid.

- **Boat Data** Shows the procedure. If there are conflicts, Off-Boarding automatically notifies you about them and allows you to override the conflicts if you are authorized to do so.
- **View Conflicts for Boat Data** Shows conflicts for the boat and whether overrides are in effect for each conflict shown.

Note: If the boat selection is grayed out, there is not enough available data to do the boating of the grid. It is possible that there is another boating on the grid before the time slot.

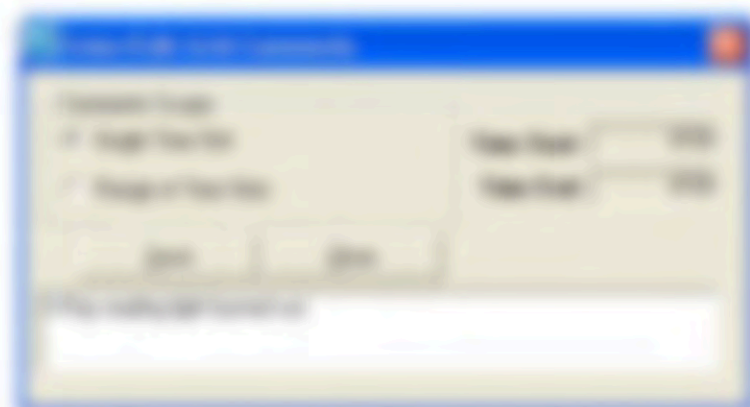
- **View Conflicts for Boasting** Shows conflicts for the boating target, equipment, etc., and whether overrides are in effect for each conflict shown.

Both of the view conflict screens have a button that toggles between **View Boat** and **View Boat**. **View Boat** provides additional information about equipment and resource conflicts.

- **New Booking** - Creates when the screen is used a booking that is already on the job. This selection should be used only sometimes of the booking.
- **More Booking** - Creates when the screen is used a booking that is already on the job. This selection should be used to make an existing booking to a different time slot.
- **Cancel Booking** - Cancels the booking after requesting a report.
- **Mail out Booking** - Places the booking on the wall but after asking you to assign it a wall for printing.
- **Print Booking for Display** - Opens the screen to select the screen to display on the Booking list.
- **Select Display Profile** - Opens the screen to select what fields to display on the Booking list.
- **New Comment** - To add a comment, right-click on a cell containing a double arrow icon to open the right-click menu, then select **New Comment**.
The New Comments screen, similar to the Detailed New Comments screen, appears.
- **Detailed Comment** - This selection allows you to create and edit comments anywhere on the job.
 - To enter a comment, place your cursor over the cell where you want the comment to go and right-click. Select **Detailed Comment**.
 - To edit a comment, place your cursor over a cell containing a double arrow icon, right-click to open the right-click menu, then select **Detailed Comment**.
 The Detailed New Comments screen appears.

SQL Building Blocks

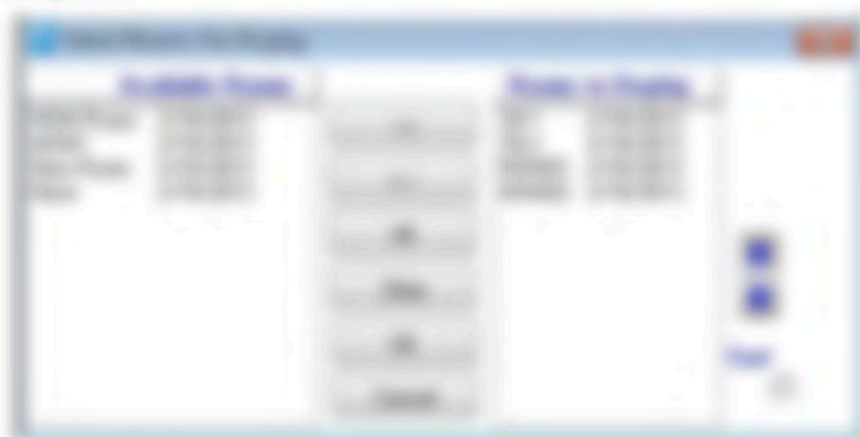
Building Data View



- **Table Wizard**: To create a new table, click on the **Table Wizard** button in the **Table Fields** list.

Field Sources for Display Option

Select **Field Sources for Display** in the right-hand menu to select which source displays in the **Table Fields** list.

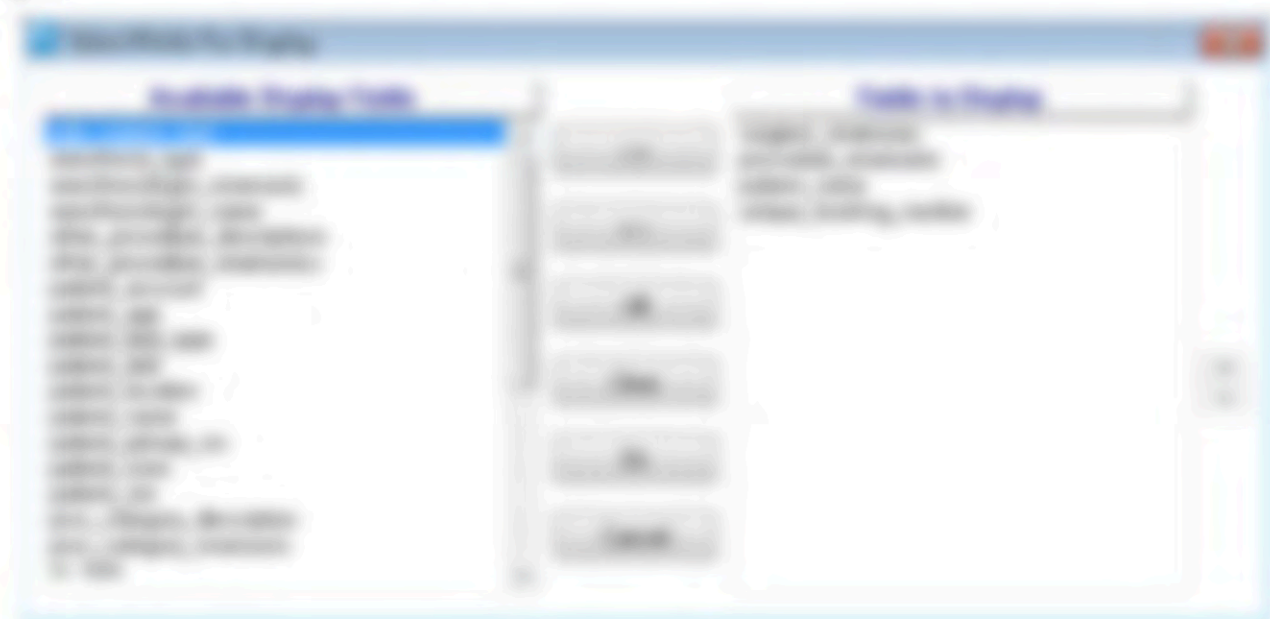


Select Sources for Display

1. Select the **Available Sources for Display** in the left column and click the right arrow.
The source appears in the **Sources for Display** column.
2. Click **OK**.
3. To select source you no longer want to display, highlight the displayed source in the right column and click the left-pointing arrow.
The source moves back to the **Available Sources for Display**.
4. Click **OK**.

Select Display Fields

Use Select Display Fields from the right side menu to select which fields display on the Building app.



Select/Remove Display Fields

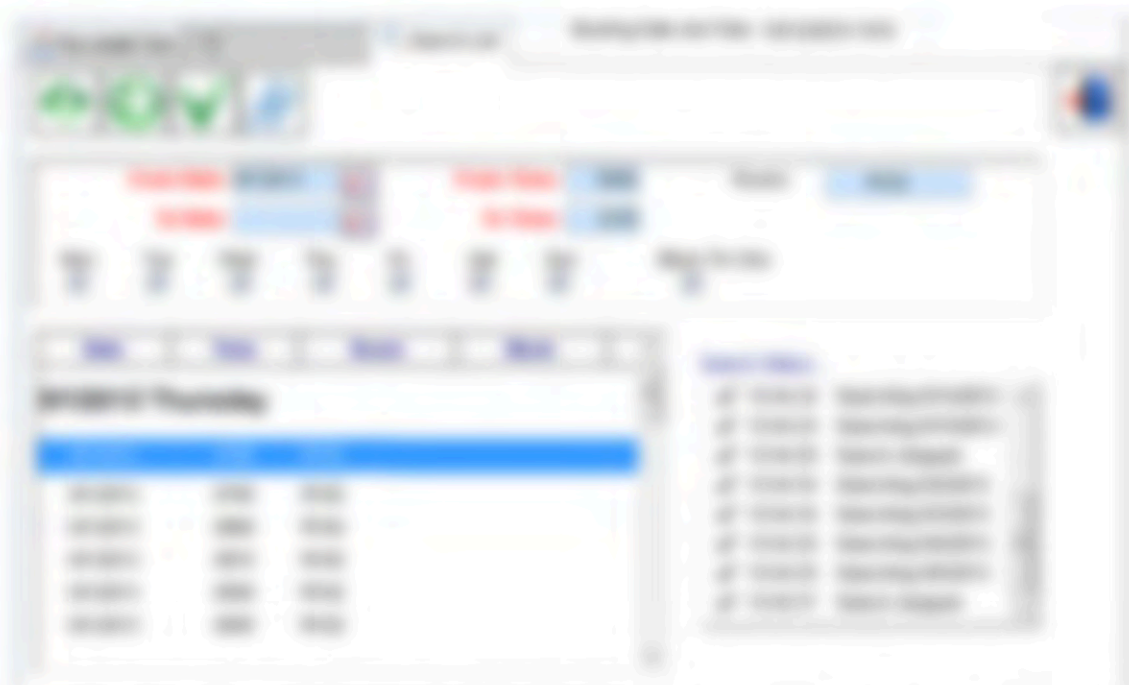
1. Select the **Available Display Fields** to display and click the right-pointing arrow button. The fields appear in the **Fields to Display** column.
2. Click **OK**.
3. To select the fields you no longer want to display, click to select the fields in the **Fields to Display** column and click the left-pointing arrow button. The fields move back to the **Available Display Fields** list.
4. Click **OK**.

Search List Tab

The **Search List** tab appears as a result of using the **Search List** method on the **Building** tab. Below is an example of the **Search List** tab.

Off-Banking Screen

Banking Notes/Patient Instructions



When the notes for updates, you can update a note, delete, and then by double-clicking it, or you can click to select an entry and then click **Delete**.

Search Type

- If a suitable note, entry, and then comes up on the list before the search is made, you can click one by clicking **Stop Search**.
- You can change the search criteria in the top of the screen and start another search by clicking **Stop Search**.
- To resume a search after stopping, click **Continue Search**.

Banking Notes/Patient Instructions

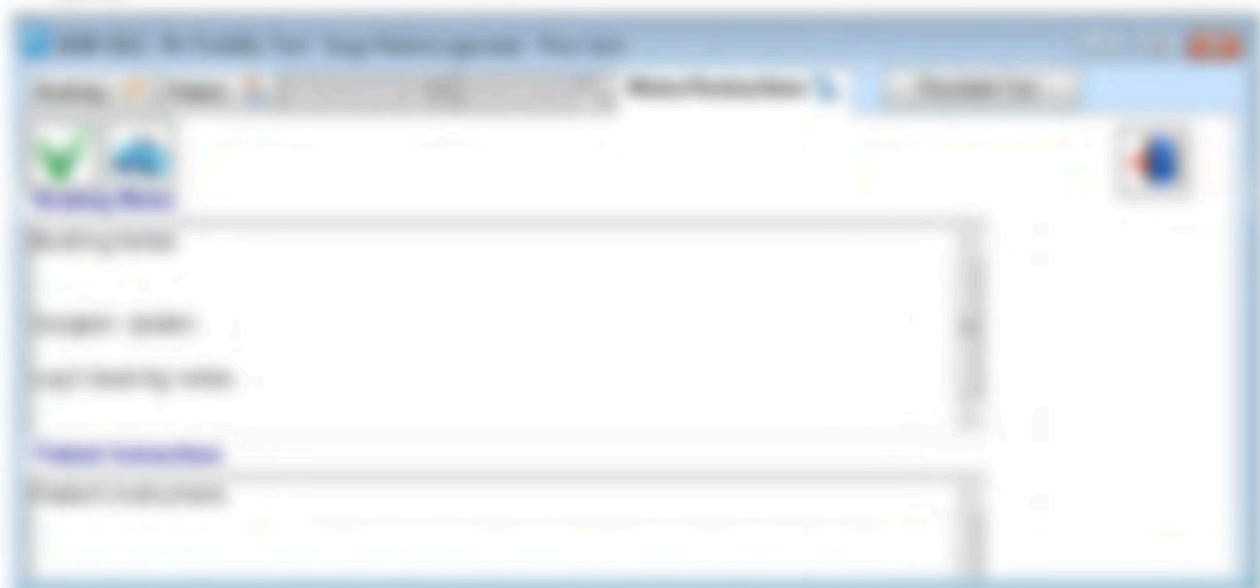
Banking Notes and Patient Instructions are stored in the Banking Notes/Patient Instructions and linked to specific procedures and/or dates for display in the Banking screen. They do not appear in the Banking screen unless the criteria for procedures, and/or the date range meet the criteria specified in the Banking Notes/Patient Instructions.

Off-Boarding Screen

Booting Windows/Feature Instructions

Notes and the features and updates about the procedures involved in the surgery are in the top screen.

- Instructions are for patients to read and follow before and after the surgery are in the bottom screen.



There are two ways to view the Booting Windows and Patient Instructions.

- Click the **NewInstructions** tab.

Note: If the tab is not active, there are no notes or instructions that need the display update.

- Click the **Bo** button.



See the Off-Boarding Configuration Guide: Booting Instructions.

Pop-up on Bo

By default, the system is set up to display the booting notes and patient instructions when the user clicks the **Bo** button.

You can disable this feature by setting the application parameter `show_notes_on_bo` to "N".

Off-Booking Screen

Isolate Patient Context from Booking

Using the Pop-up on the feature depends on several combinations of application parameter settings and circumstances:

- The **BookingInstructions** tab will pop up on the if parameter **show_booking_pop_up** is set to "Y" and either of the following is true:
 - Parameter **booking_tab_always_open** is set to "Y"
 - Parameter **booking_tab_always_open** is set to "Y" and all required fields are not filled in
- The **BookingInstructions** tab will not pop up if parameter **show_booking_pop_up** is set to "Y" and one of the following is true:
 - The booking is for the patient
 - The booking is a repeat
 - Parameter **booking_tab_always_open** is set to "Y" and all required fields are filled in

Isolate Patient Context from Booking

Depending on the system configuration, schedulers without rights to use clinical applications may be able to open multiple booking sheets at a time. Additionally, a user can only open one booking at a time.

With this configuration, schedulers with no access to clinical modules will have the following permissions:

- Schedulers can open multiple booking sheets at one time
- Schedulers can open user records

Note: The **Other Applications** menu option is disabled for these schedulers along with the **Appointment Manager** and **Phone Manager** options in the main toolbar.

Pre-Admit Tests

Menu/Pop - New Booking

Menu/Tools - Manage Pre-Admit Bookings

Menu/Tools - Schedule Setup

Menu/Booking Options - Pre-Admit Test Booking

Our Manager makes scheduling Pre-Admit Tests (PATs) easy, allowing you to book a PAT any time after booking an operator.

In this chapter you learn how to book PATs, and we explain your options for booking, viewing, and editing PATs.

This chapter covers the following topics:

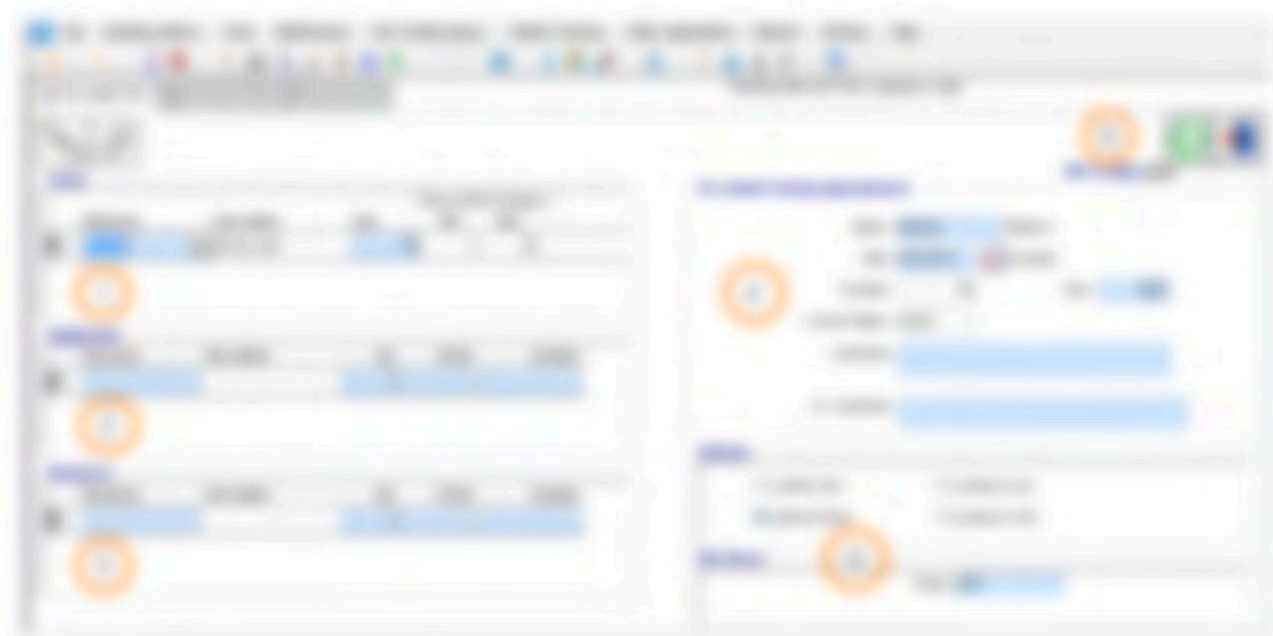
- Book/View/Booking a PAT
- PAT Access
- Pre-Admit Test Day
- Access the PAT Access
- Book a PAT

Quick Start: Booking a PAT

After accessing the PAT screen, booking a PAT is much like booking a surgery. This illustration and the steps that follow show you how to book a PAT.

Pre-Setup Tools

Start Your Working vRF



Setup vRF

1. Select the Tools section for **Resources** under the Tools.
2. Select the Equipment needed for the VRF.
3. Select the Resource needed for the VRF.
4. Click the Pre-Setup Tooling Equipment section **Status**, **Tools**, **View the Tools Direct** only, **Location**, **Current Status**, **Comments** and **OK** Comments.

Note: Tool entered here prior to setup.

5. Select an **Option** tooling method. Tooling Options with the same way as other tooling is simple. **Set** tooling, **Set**, **Equipment/Resource** from at step 2.
6. Click the **OK** button to begin the VRF tooling process.



Note: After entering a Tool Step 1, standard equipment, resources, and location are automatically populated. You get all these fields as resources. Doing this does not change the default configuration in the VRF database.

P&T Screen

Menu/File > New Booking

Menu/Tools > Manage Pre-Event Bookings

Menu/Tools > Schedule View

Menu/Booking Options > Pre-Event Tool Booking

You use the P&T screen to book subjects for your next meeting after you have booked them for an operation. Bookings in the **Active Meeting Requests > Reservation** section can be used for P&T bookings. The subject book is added to a P&T subject book, is booked for a presentation.

The P&T Booking screen contains three tabs and the **Pre-Event Notes**.

- Pre-Event Tool** This tab is where you enter P&T information, such as subject, equipment, and resources. See [The Pre-Event Tool](#), tab on this page.
- P&T Booking Grid** This tab shows the P&T topic schedule in grid form. The **P&T Booking Grid** tab is functionally the same as the **Off Booking screen Grid** tab. See [Booking Grid](#), tab on page 25.
- Search Grid** This tab shows the P&T topic schedule in list form. The **P&T Booking Search** tab is functionally the same as the **Off Booking screen Search** tab. See [Search Grid](#), tab on page 25.
- Pre-Event Notes** Direct you to view pre-event notes.

Note: An appendix in the **Off Manager Configuration Guide** provides information about the operation between different versions of P&T tools. It describes the features that determine what tools version is available and visible as you work in P&T bookings.

Access the P&T Screen

The following table describes the different steps to open the P&T screen.

Task	Sequence
Book a P&T immediately after booking the subject	Pre-Event Tool section in the Off Booking screen 

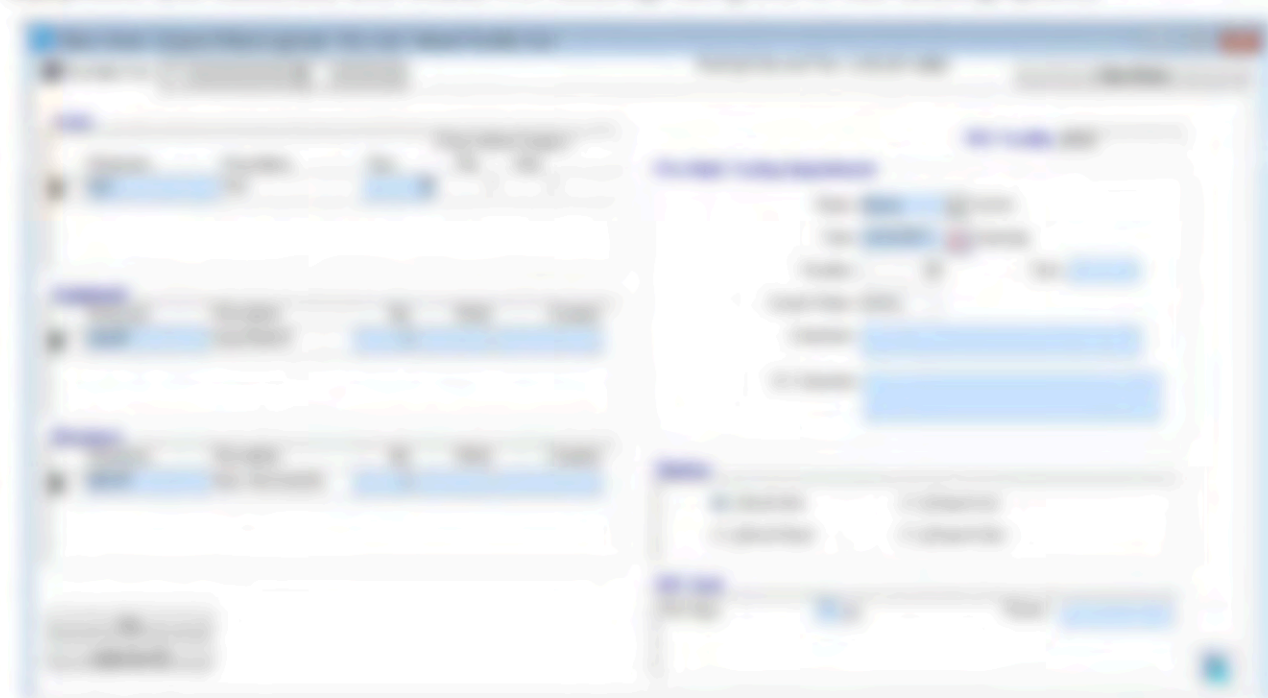
Pre-Submit Tests

Pre-Submit Test Tab

Task	Workflow
Add a PRT that has already been created	Tests > Manage Pre-Submit Bindings Managing Pre-Submit Bindings on page 102
Creates a new PRT binding or edit an existing one	Tests > Manage Bindings Managing Bindings on page 102 Tests > Schedule Views Scheduling Views on page 102

Pre-Submit Test Tab

The Pre-Submit Test tab is the scheduling point for PRT scheduling. It is where you select the tests, equipment, and resources, and create PRT bindings using one of four binding options.



Add a PRT

1. In the **Equipment** section of the Test section, select the test you want to schedule.

Managing Bookings and Booking Tools

Overview

The manage screens enable you to search for bookings that share characteristics, such as segments or procedures. Most criteria and custom queries are also available. For example, finding all segments who are performing several types of cardiac procedures within the next three months.

Queries typically serve a particular purpose, such as changing all bookings scheduled for one room to another room, or restructuring all operations for a segment.

Each manage screen has a different function as described below:

- **Manage Bookings** is used to work with all bookings.
- **Manage Pre-Event Bookings** is used to work with PRE bookings.
- **Schedule View** is used to work with bookings in a grid format.
- **Moveings a Day** is used to move bookings from room to room and time to time within the same day.

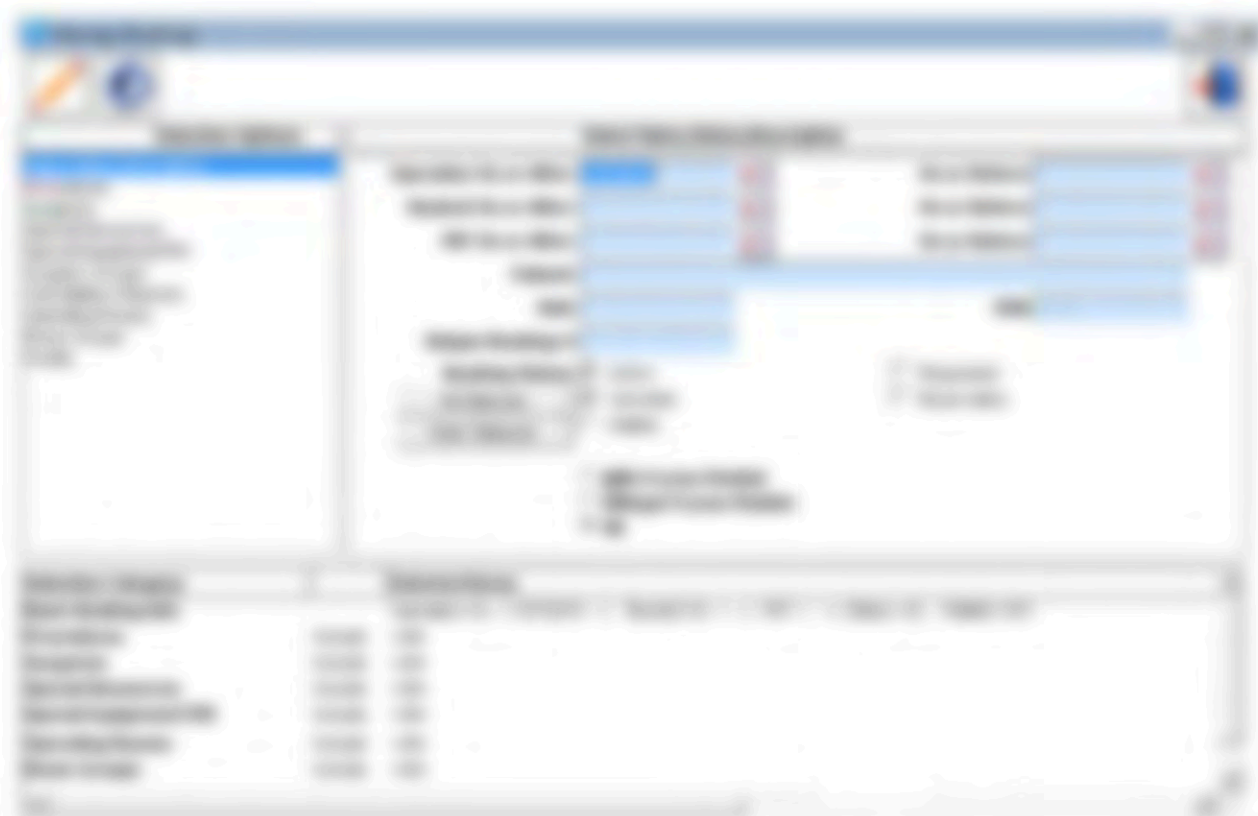
These four booking management screens, as the Tools menu, provide the ability to search for and edit all PRE and PRE bookings. The drag-and-drop feature rearranges schedules, prints report with booking, books Pre-Event Tools, along with other booking functions.

This chapter covers the following topics:

- Manage Screen Overview
- Managing Bookings

Managing Bookings and Booking Tools

Manage Booking Selections



Selection Options

The Selection Options are categories of selection criteria. Clicking each category opens a screen where the corresponding search criteria is defined.

Selection Option	Description
Booking Selection	Searches for data ranges, address information or booking information to search for. Days, Dates, Book Booking Number, and Social Security Number (SSN) Date – Searches based on selecting the tools. All Bookings or Other Bookings specifies the booking selection of interest, and All Bookings is used when selecting other Other Bookings is used when selecting. Selecting All Bookings requires the Booking Priority and Number of Days setting range to also be defined. All Select this to make the selection of booking address information in the search or select All Dates that is a Without Dates Booking.

Managing Bookings and Booking Tools

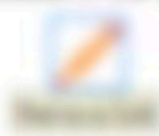
Manage Booking Selections

Selection Option	Description
Proceedings	Link the active Proceedings in the Proceedings dictionary from which you can select to include or exclude in your search.
Language	Link the active Language in the Language dictionary from which you can select to include or exclude in your search.
Special Resources	Link the active Special Resources in the Resources dictionary from which you can select to include or exclude in your search.
Special Equipment/VIR	Link the active Special Equipment in the Equipment dictionary, as well as the VIR Fleet Booking VIR dictionary from which you can select to include or exclude in your search.
Region Group	Link the active Language in the Language Group type of the FromLanguage/Proceedings dictionary from which you can select to include or exclude in your search.
Consultation Period	Link the active Consultation Period in the Consultation type Selection type from which you can select to include or exclude in your search.
Operating Period	Link the active Off-peak Period in the Period dictionary from which you can select to include or exclude in your search.
Week Group	Link the active Period in the Week Group type of the FromLanguage/Proceedings dictionary from which you can select to include or exclude in your search.
Facility	Link the active Facilities listed in the user's account in the Facilities dictionary from which you can select to include or exclude in your search.

Custom Field Select enables you to create and save your own search parameters, including your custom fields and relationships between fields. For complete information on using **Custom Field Select**.

The **Clear** tool button (not shown in the accompanying screenshot) removes the check marks from all entries in the current **Select Options**. Using **Clear** does not affect the other sets of selection options. For example, clearing all of the Language selections does not affect your previous selections.

The entries at the bottom records the selection changes you make as you make them, so you can see at a glance what entries you have selected. If no items are selected, all items are automatically included in the selection criteria for that option.



After entering the search criteria, click the **Search** button to search for the corresponding bookings. The manage arrival screen and the manage departure screen appear with a list of bookings that match your criteria.

Configure the Display

The following steps describe how to configure the display of the arrival and departure screens.

1. Click the configuration icon.



The **Configure** window is displayed when you click the icon.

2. Click to select the **Available** tab on the left and click the arrow to move from the **Available** to **Display** area on the right.

Note: At least one arrival tool must always be displayed at all times within Manage Bookings and Manage Tools. If entering Manage arrivals ? at least one display tool is not selected.

3. Click **Save** to save the configuration.

Note: The **Configure** to **Display** settings are saved per user, per workstation.

Managing Tools

Managing Bookings

Menu Tools in Manage Bookings

The user Manage Bookings is assigned the following:

- Add booking date times, route, duration, etc.
- View arrival tools
- View and print schedules
- Print arrivals and arrivals
- Add arrival date
- Cancel bookings

Select Bookings

1. If you are not already familiar with using manage arrivals, review [Manage Arrivals](#) before using it.

3. Enter your search criteria. Your selections appear under **Selected Words** at the bottom of the screen.
4. Click on the **Display Page Words** and enter your custom text information.
5. Click the **GeneratePDF** button.

The Storage Manager System cannot access any data for backing up or restoring.

[illegible]

- The **Address** column is a subject's name, address, or multiple addresses, as appropriate.
- The **BirthDate** column shows the beginning birth/preference/first birth time for the prediction.
- The **End Date/Time** column shows the date and time of the Prediction Ends for this case.
- The **Notes** column can have alternatives:
 - 0 = None
 - 1 = Observed
 - 2 = Forecast
 - 3 = Observed
 - 4 = Forecast
- If you open a reading that uses conditional equipment, a warning message displays. Selecting a prediction can display the message. Changing the facility is a reading, so you display the message. Because changing the facility after equipment is set up in the reading area through the equipment is not addressed by the facility. If the source, and **Method** is equal, the equipment is manually made an adjustment. You can remove conditional equipment and add addressless equipment, but it is not possible to add other conditional

Managing Bookings and Booking Tools

Managing Bookings

- equipment. A booking can be tied with unaffiliated equipment inventory.
- If in the Storage Bookings screen, you selected only **Multiple** from the booking options, and the **Booking Request Received Date** field in the bookings table column, the bookings are listed according to their values with the oldest first.
- If the Requested Priority Property is implemented, the Storage Bookings screen has a different arrangement of columns, whose values are explained in Table 10, page 10.
 - The **Bookable Time** column shows the Bookable Priority value.
 - The **Requester's Priority** column is to the right of the **Bookable Time** column.
 - The **Assignment Date** column is to the right of the **Requester's Priority** column.
- The **Booking #** displays the ID# and by default is the last report results column. If there are any unending settings configured, the ending settings are displayed and additional changes must be made manually.

Storage Booking Buttons

Click the buttons in the Storage Bookings Option screen to perform the corresponding commands.
Storage Booking Buttons

Action	Description
 Get Request Data	Bring up the Request list of the 100 Booking screen as you set with the data in the user-defined fields. See Custom Work on page 10.
 Update All Records	Enables you to update the same user-defined fields in multiple records. See Custom Field Screen on page 10. Note: If a Requester in any of the selected bookings is set to show only access in the Thermostat Office view set in Security Manager , a message appears indicating that access is restricted and some bookings will not be updated.

Action	Description
Free Booking 	Drag up the booking window with a copy of the selected booking. You can then change any of the original booking's parameters and save it as a different free slot. Creating another booking for the original will copy the parameters you changed being different. Only the first slot is not copied to the new booking. The original booking remains unchanged. Note: When you make a booking which is using reactive entries in any of the following fields in the booking edit page: original, appointment, slot, specialty, therapist, treatment, room, location, facility, priority, equipment, etc. An automatic notification appears that informs you that you are copying a booking that has reactive entries. The reactive entries remain on the original slot record. Note: If a trigger on the Booking is set to show this window on the Reception Office and set in Security Manager, a message appears indicating that access is restricted and the booking cannot be copied.
Hot Booking 	Click to add HOT bookings to the highlighted slot. See the icon. Click on icon to.
Bookable Slot 	Drag up the booking in the HOT Booking window to setting the booking HOT or select slot. You can also double click on any entry in the list to add the booking HOT or select slot. See Booking Tool introduction on page 45. There is an interaction with those windows mentioned in another topic. Click on page 45. Note: If a trigger on the Booking is set to show this window on the Reception Office and set in Security Manager, a message appears indicating that access is restricted and offers the option to view the booking.

Managing Bookings and Booking Tools

Managing Bookings

Feature	Description
 Update Case Record	Provides you to update a case record for the selected operation by bringing up the Update tab of the Case Record screen with all of the bookings for patients that match the search criteria. If multiple bookings for the same patient are found, you can edit the Case Record by selecting the patient's name and number, or account number, if available, of the affected record. See Update Case Record screen on page 100.
 New Audit	Shows a complete history of the highlighted booking. The audit tool records every step the booking, and its associated patient, has taken, modified or printed.
 New Booking	Brings up a new-only booking window containing all procedure and patient information. See New Booking form on page 50.
 Edit Patient Profile	Allows you to make changes to the data on a patient profile. These changes appear on the profile tab and on the case record, but they are not permanent. They do not affect the information used in the permanent profile. See Edit a Patient Profile on page 100.
 Printing	Prints profiles by case list. See Printing by Case List on page 100.
 Attachments	Prints attachments by booking. You have the options of including their images under TopPhoto or Attachment fields on the attachment. See Attachments on page 100.
 New Attachments	Prints booking attachments in external reports. See Reports on page 100.

Managing Bookings and Booking Tools

Managing Bookings

Action	Description
	Press booking details. See <i>New Booking</i> screen on page 125.
	Take you to a module that allows you to add others, bookings, and details for selected users. For more information on the preceding topic, see the following chapter in the <i>UI Manager Configuration Guide: New Group</i>.
	Shows all changes made to fields within the booking. See <i>Booking Tool user tool</i> on page 125.
	Enables you to cancel bookings or change cancellation reasons for selected bookings. Note: The trigger on any of the selected bookings is set to <i>How this works</i> in the <i>Payment Office</i> set up in <i>Security Manager</i>, a message displays indicating that access is restricted and some bookings will not be updated. See <i>Permissions</i> screen on page 125.
	Reserve available bookings to future dates. Note: The trigger on any of the selected bookings is set to <i>How this works</i> in the <i>Payment Office</i> set up in <i>Security Manager</i>, a message displays indicating that access is restricted and some bookings will not be updated.
	Updates the Storage Booking Options screen with the most current information from the database.
	Shows the Storage Booking Options screen.

Managing Bookings and Booking Tools

Managing Bookings

Multi-facility view

In multi-facility view, depending on the configuration you may be presented with an error information window such as the following when opening a booking.



This can happen if your manager has changed the facilities configuration of one or more facilities so certain ones in the booking tool that they are no longer available for the bookings facility. For example, the booking may include an item of equipment that is no longer available in the facility.

Click **OK** to close the error information and continue working with the booking. If you later view the booking, you will be shown the window again and it will include a **File** button. Click **File** to return to the previous screen and change the facilities selections for the multi-venue before going again or click **Bookings** to view the booking with the multi-venue.

Global Field Update

Global Manager allows you to update user defined fields in all or some of the bookings simultaneously. To change the workflow type for a group of bookings, use the global update feature.

1. Select the bookings you want to update and click **Global Field Update**. The Global Bookings screen opens. Select an option to specify the bookings to update and click **OK**.

Note: If a trigger on any of the selected bookings is set to, then this screen in the Planning Office will set in Security Manager a message flagging indicating that access is restricted and some bookings will not be updated.

Managing Bookings and Booking Tools

Managing Bookings

Option	Description
Unbooked	Only the unbooked entries.
Booked	All of the records with a check mark in the left column of the Options column.
All	All of the records in the Options column.

1. Under **Select Field to Update**, select the user-defined field you want to update. The field's type is a **Destination Field**. This field appears in the **Type** column below.
2. Under the new **Value**, if it is a **Destination** or **Update**, there is a drop-down menu listing the entries. The new value automatically enters into this field on all forms from the users you selected.

Note: In multi-tenancy sites, depending on the configuration the "Value" value may show a list for each tenant from the selected bookings. If all selected bookings are from the same tenant, there will just be one row.

The screenshot shows a dialog box titled "Update Field Update". Inside, there is a table with three columns: "Field", "Type", and "Value". The "Field" column contains "Name" and "Phone". The "Type" column contains "Destination" and "Update". The "Value" column contains "John Doe" and "1234567890". There are "OK" and "Cancel" buttons on the right side of the dialog.

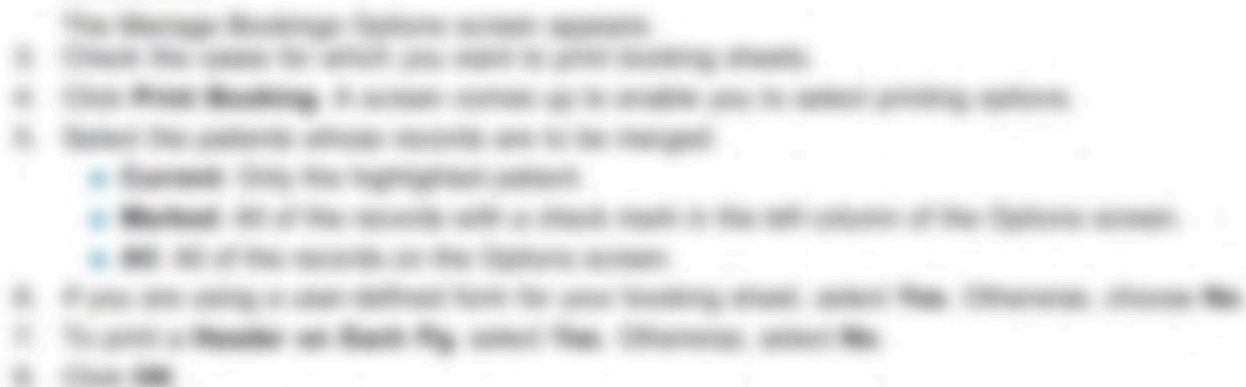
For each row that you want to update, select a new value in the **Value** column.

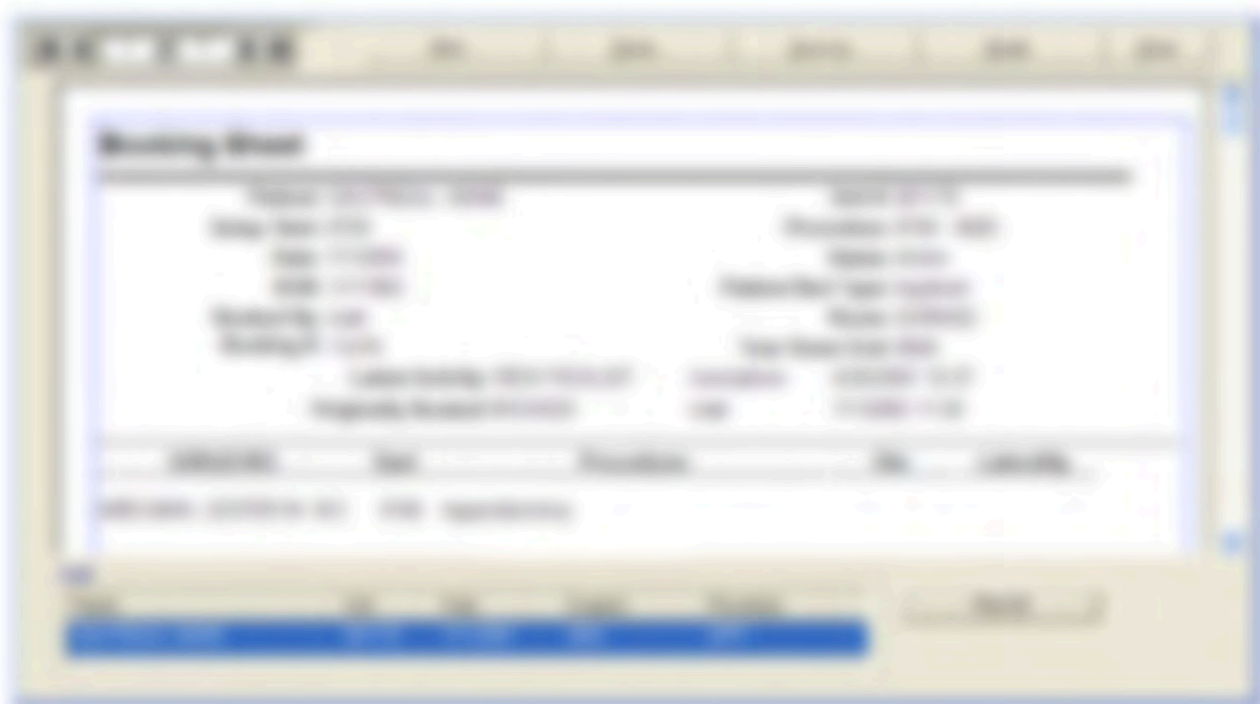
Edit a Frozen Booking

The frozen booking feature enables you to modify the contents of a booking for one user, without changing the preference set or booking it is based on. For all other users, the booking and preference set remain the same. We advise that questions and user may appear as booked, but in the user tenant, depending on administrative settings, there also that booking is **Booked**. We have the frozen booking that is the user tenant through booking only if the user tenant has not all been entered.



1. **Share Tools + Storage Settings**





6. Optional: Click on **Booking Sheet** in the left-hand sidebar.
7. To print the booking sheet in the preview window, click **Print**.
To print all of the booking sheets, click **Print All**.

Note: **Print All** does not allow page range selection. Use **Print** at the top of the window to get the page range option.

Cancellation Options

Cancel is used to cancel bookings and modify cancellation requests and comments for bookings that have already been cancelled.

You can choose multiple bookings for cancellation processing. The bookings that are already cancelled, click **Cancel** to change the cancel reason and/or to add the cancellation comments.

1. Select the bookings you want to cancel and click **Cancel** in **Which Bookings?** column or click to specify the bookings will edit click **OK**.

Option	Description
Cancel	Only the highlighted option.
Cancel All	All of the records will a check mark in the left column of the Options screen.

Managing Bookings and Booking Tools

Managing Bookings

Option	Description
All	All of the records in the System screen.

Note: If a trigger on any of the selected Bookings is set to Yes, this screen in the Physical Office will set a Security Manager, a message flagging indicating that access is restricted and some bookings will not be visible.

- The first stage is select the reservation. This screen will apply to all of the bookings reserved at this time.
- In addition to the cancel screen, you may be asked to supply a comment for each reservation, depending on the setting of cancellable, deposit, cancellation, comment. You have the opportunity to enter a different comment for each booking you are cancelling.

Note: When the booking screen `cancel/confirmation` is set to yes a booking follow up email will be triggered. It will be generated by system and control the user before sending the email. See the IT Management Configuration Book Booking tool Email settings for information on booking change actions that occur a follow up booking email to the user.

Note: The list of cancellation reasons comes from the General System Configuration screen.

Booking Field Level Audit Trails

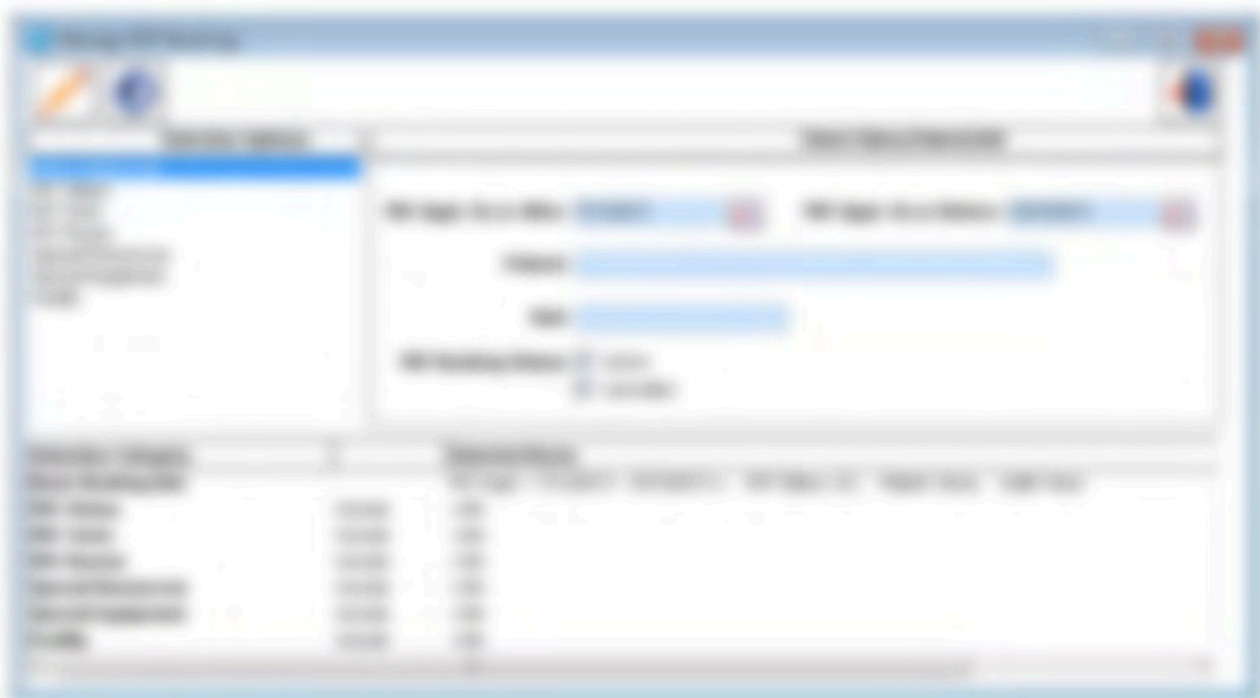
The Field Level Audit Trail logs changes to any data field in the booking once it was created. This log includes the original value, new values, who made the changes, and dates the changes were made.

Once Field Level Audit Trail is open the Field Level Audit Trail screen. There are two audit trail options:

- Booking Data
- System Data

Managing Bookings and Booking Tools

Managing Your Hotel Bookings



Manage Hotel Bookings

1. If you are not already familiar with using manage systems, under **Storage System Description**, click **Go**.
2. Enter your search criteria. Your selections appear under **Selected Dates** at the bottom of the screen.
3. If you are using **Custom Field Select**, click **Custom Field Select** and enter your custom field information.
4. Click the **Refresh/Get** button.



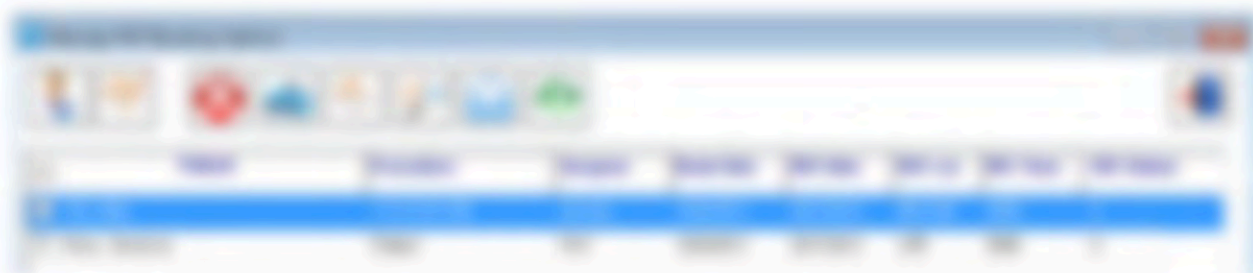
5. The **Manage Hotel Booking Options** screen appears, showing the hotel bookings that match your criteria.

Manage Hotel Booking Options

The **Manage Hotel Booking Options** screen shows the bookings you specified in the **Manage Hotel Booking** screen.

Managing Bookings and Booking Tools

Managing Pre-Booked Bookings



Select a pattern and use the buttons described next to accomplish your task.

Manage PBT Booking Buttons

Click the buttons on the Manage PBT Booking Options screen to perform the corresponding commands.

Button	Description
 Add Pattern Booking	Opens the PBT booking area where the user is able to enter with Tools, Equipment, Resources, Status, Date, Time, Location, Current Status, Comments and ID. Comments in the original PBT booking.
 Add Pattern Note	Brings up the Notebook tab of the PBT Booking screen so you can add the information in the user-defined notes. Pattern Tool, Pattern on page 25
 Bookable Booking	Brings up the booking on the Bookable Tool tab of the PBT booking screen. You can then add the booking. Bookable booking on an entry in the list does the same thing. Pattern Tool, Tool on page 25
 View Booking	Brings up a read-only booking summary, containing all information and patient information. View Booking Data on page 25

Managing Bookings and Booking Tools

Managing Pre-Event Bookings

Action	Description
 Print Bookings	Prints PDF Booking Sheets. Print a Booking Sheet as page 1/20.
 Print Bookable	Prints PDF Booking Schedules or External Reports. (Search as page 1/20)
 Mail Merges	Takes you to a module that allows you to print letters, envelopes and labels for selected PDF bookings. For more information on the printing tools, see the following chapter in the CRM Manager Configuration Guide: Mail Merges.
 Refresh	Refreshes selected PDF bookings after confirmation.
Reset All	Resets selection of bookings in the screen.
Remove All	Removes selected items from all bookings.
 Refresh	Refreshes the Storage Bookings Options screen with the most current information from the database.
 Print	Prints the Storage PDF Booking Options screen.

Schedule Viewer

Menu Tools in Schedule Viewer

The Schedule Viewer shows the Booking tool view of the CRM or PMS schedule for the dates and rooms you choose. This allows you to make scheduling changes quickly and easily.

Schedule Viewer tools are explained in the following sections:

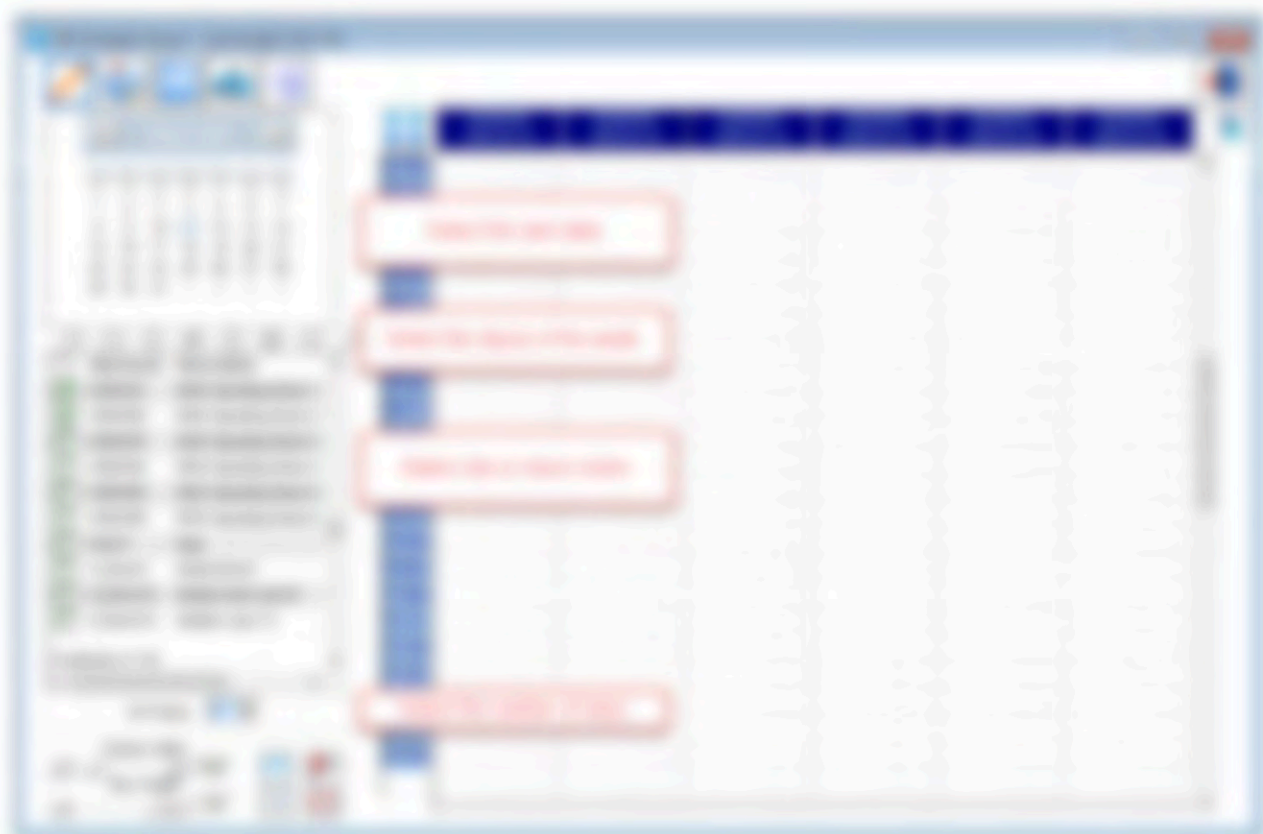
- Review CRM or PMS room availability
- Right-click menu for the Scheduling tool
- Overview table
- Show a Single Booking
- Show Several Bookings
- Show Bookings in the Detail
- Hide or Show the Booking Detail

Select Screen

When you first enter the Schedule Viewer, you are asked to select either **CRM** or **the latest Booking**. Depending on the selection you make, either the CRM Schedule Viewer or the PMS Schedule Viewer opens.

Schedule Viewer Screen

The CRM Schedule Viewer and PMS Schedule Viewer have the same look and feel.



Example of the MS Teams interface. The top bar shows the meeting agenda. The left sidebar shows the navigation pane. The right pane shows the details of the selected meeting.

Meeting Tools

Icon	Description
	Meeting
	Meeting
	Meeting Group

Icon	Description
	Stop
	Reschedule

Reschedule All or Part of an Appointment

When the Scheduling Tools opens, the right pane is initially empty.

1. In the calendar, select the start date.
2. Go through the calendar, select the days of the week that you want to date. (The first box on the left is for Sunday.) To select all days click the box on the far right.
3. Select the name whose appointment you want to date.

Book selection should look like this:



Click the Book Selection button to select all of the appointments in a single facility.



Click the Book Group button to select all of the appointments in a group of facilities.

4. Select the number of days you want to date.

Example: In the preceding screenshot, appointments for two users selected on a Wednesday are shown for three days: Wednesday, 11; the start date, Friday, 13; and Wednesday, 18.



5. Click the Reschedule button. (You can also double-click the starting date.)
The appointments that meet the selected criteria are displayed.

Right-Click Menu for the Scheduling Grid

Right-click the grid to see the actions that you can perform.

Note: Depending on where the cursor is when you click, some of the menu commands may not be available.

Managing Bookings and Booking Tools

Available Online

Component	Description
New Reservation	URL: reservation.html Displays an IFR Booking screen to enable you to enter a reservation.
Get Booking	URL: get_booking.html Displays the IFR Booking screen for the selected booking. This screen includes a list of the IFR Booking screen. See Booking Tools: Reservation on page 45. There is an interaction with these controls explained in Tools on page 55.
View Booking	Displays a read-only Booking Summary, including reservation and patient data. See View Booking on page 55.
Get Booking	Displays the booking screen with a copy of the selected booking. This screen displays any of the original booking's reservation and data. If it is a different time slot, loading another booking for the original will only the parameters are changed using different. For IFR bookings, only the IFR data is not copied to the new booking. The original booking screen is unchanged.
Cancel Booking	URL: cancel_booking.html Displays the selected booking. This must select a Cancel Reason and you have the option to enter a comment.
Cancel a Booking	Deletes the selected reservation of the selected date by transferring it into a queue.
Put up Booking	Enables you to put up a the booking you selected with a right-click. A yellow text box appears at the bottom of the screen to indicate that you have a booking that has been put up. The yellow text box that you booking is the put up option at the bottom left. 
Stop Booking	Displays the booking screen with the main and stop you right-clicked on the screen and the booking screen, displayed a Book Status. This screen displays any of the details that you the the button is visible as you would any other booking.

Managing Bookings and Booking Tools

Introduction

Icon/Label	Description
 Calendar View Screen	Click Calendar View to enable you to create a new screen for the selected operation by bringing up the Calendar tab of the Open Request screen with all of the bookings for activities that match the search criteria. You have a choice of searching on the activity's name, unit number, or account number. If available, if the selected screen, from there, you can create a new screen that is automatically linked to the booking. See Calendar View Screen Screen on page 115.
 Calendar View Edit Screen	Bring up a screen to enable you to change what events are displayed on the grid. See Calendar View Edit Screen Screen on page 115.
 Calendar View Filter Screen	Bring up a screen to enable you to change the fields that are displayed on the grid. See Calendar View Filter Screen on page 115.
 Stop Time	Start the Time, which is used to adjust the Off Schedule screen screen. The screen indicates when the time will end, and then marks the time as completed in the last column. The time can also be stopped and stopped by clicking the time icon located in the bottom-right corner of the Off Schedule screen.  As it through the icon indicates that the time is not active. 
 Refresh Time Screen	Click to set the time. Set to how often to schedule you want Off Manager to check for new bookings and refresh the Off Schedule screen screen. From Stop Time when screen that appears to have the time set automatically, when time you open the Scheduling time.
 Time Completed	Available in time area with a double arrow icon, indicating that the unit has a comment to display.
 Time Not Completed	Available in time area in range of time, indicating that the selection is either not comments or not working time.
 Time Not Completed	Available in time area with a double arrow icon, indicating that the unit has a comment, and this is where the comment.

Icon	Description
	Opens the main Scheduling Center screen to enable you to add, change, or delete book times for the book and day the center is on. See the iLL Manager Configuration Guide: Booking Features Schedule.
	Allows to schedule a book time for general booking in open mode. iLL Manager confirms the schedule with the book user and send to administrators and book life is now available.

Expand/Contract Feature

After entering the center you want to edit, you can expand the grid to take up the entire screen by clicking on the white icon at the top of the table column.



To collapse the grid back to its original size, click on the gray icon at the top of the table column.



Expand Grid Feature

You can use the magnifying glass icon at the bottom of the screen to temporarily double the amount of time shown for each block on the grid (10 minutes to 20 minutes, 20 minutes to 30 minutes, etc.).



This feature allows you to see much more of the day on the screen at a time. It is important that there is no effect on the actual times and you cannot edit the schedule in the expanded grid.

Note: Schedule items that occupy less than a full block in the expanded grid may not display properly.

To reset the view back to the standard grid, click the magnifying glass icon again.

Surgeon Filtering for Schedule View

When a booking is created in a multi-facility environment and the option, surgeon, listing, facility, application parameter is enabled, selection of the surgeon and associated facility.

Managing Bookings and Booking Tools

Reservations Only

events will occur in Schedule View after the **Stop Booking** operation occurs.

The system will first verify that all suggestions and amendments on the booking have arrived in the facility associated with the new visit. If any of the suggestions or amendments that are assigned to the booking are not authorized for the new visit then a message is displayed showing which is not authorized and the move process is aborted.

Reservations a Day

Main Tools in Reservations a Day

The **Reservations a Day** feature allows you to view and quickly change the DPs scheduled for a selected day.

The **Reservations a Day** screen shows a Booking Grid view of a day's DP schedule. The grid shows bookings on the grid in different times and colors, and you can use bookings in a queue to change their location or to move them while you move other bookings around the grid.

If the rebooking, modification parameter is active, and you are rebooking a case out of block, the **Book Move Priority** screen appears to facilitate manual book moving.

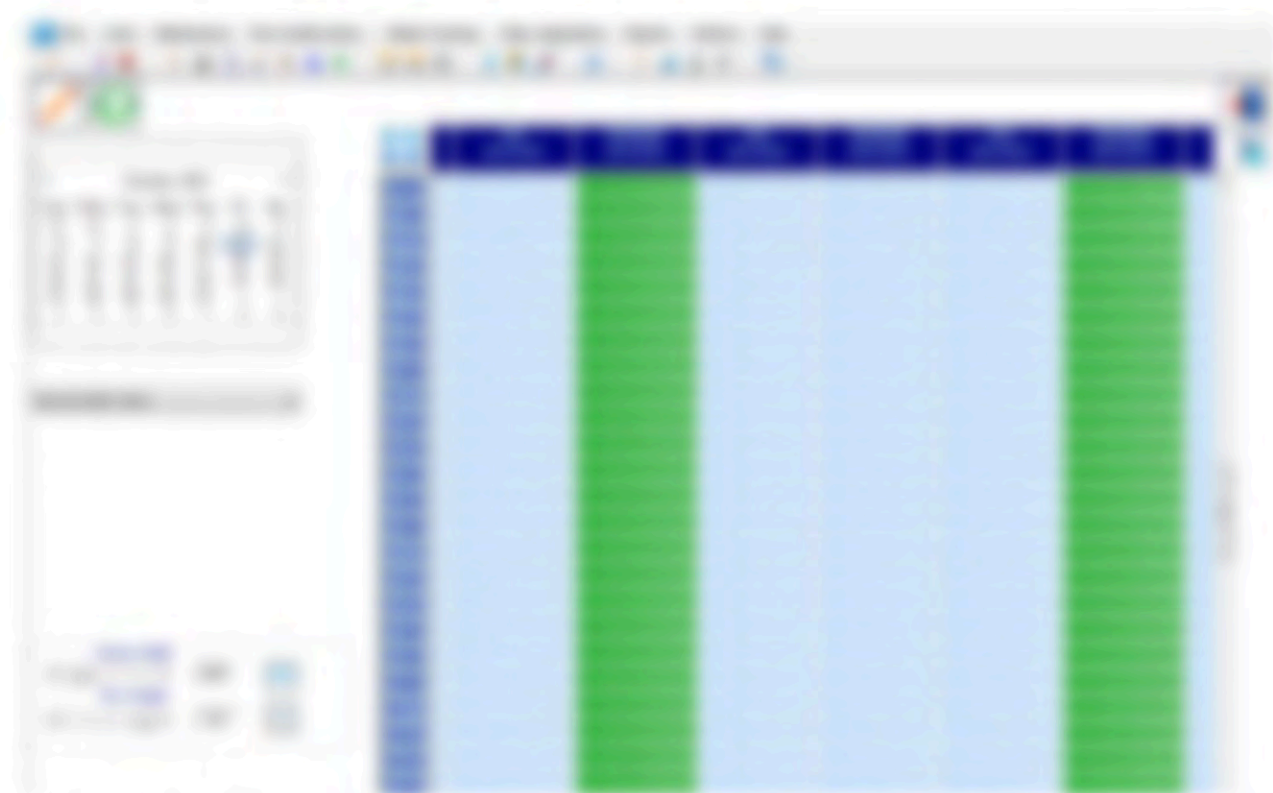
Best Practice: When you use the **Reservations a Day** feature, keep in mind that other users are logged out of the day. If a multi-facility site, this effect can be worked to facilitate other than your own by an administrator's setting of the application parameter **reservations_cancel_out** and to 1.

Reservations Only

1. **Main Tools in Reservations a Day**
2. **Specify a facility, if necessary.** The **Reservations a Day** screen appears.
3. **Select a date from the calendar.** Then click the **Reservations Only** button.



The Booking Grid, showing the DP schedule for the specified day, appears.



The DayView interface features in this screen works the same way as in other booking grids. See DayViewInterface, Features on page 112.

- a. Right-click on an entry in the Booking list that you want to move. A menu will appear. The right-click menu appears. This menu has all the commands you need to manage in the
- b. Select the menu items you need to accomplish your tasks. The commands available vary depending on which you click. See the appropriate sections in this chapter for complete instructions on using the right-click menu.
- c. In the **Move** menu, select a method of conflict checking.
 - Select **Conflict-check On** to check conflicts for only the bookings that have been moved.
 - Select **Conflict-check All** to check outstanding conflicts for all bookings for the day. Conflicts are reported in a list like the following:
- d. Click the **No** button to remove conflict checking. See Conflict Checking on the next page for a discussion of what happens when conflicts are found.



Managing Bookings and Booking Tools

Managing a Day

1. Click **Manage** to show the screen.

If conflicts for moved bookings have not been resolved, a warning appears that the changes will not be saved.

If no conflicts remain unresolved or no bookings were moved, the **Manage a Day** screen opens.

Note: When the booking status **unavailable** is set to be used as booking follow-up status and the flag is set to **unavailable**, the system will convert the user before sending the email. See the **Off Storage Configuration Tools Booking** tool drop settings for information on booking change actions that occur when a follow-up booking status is set.

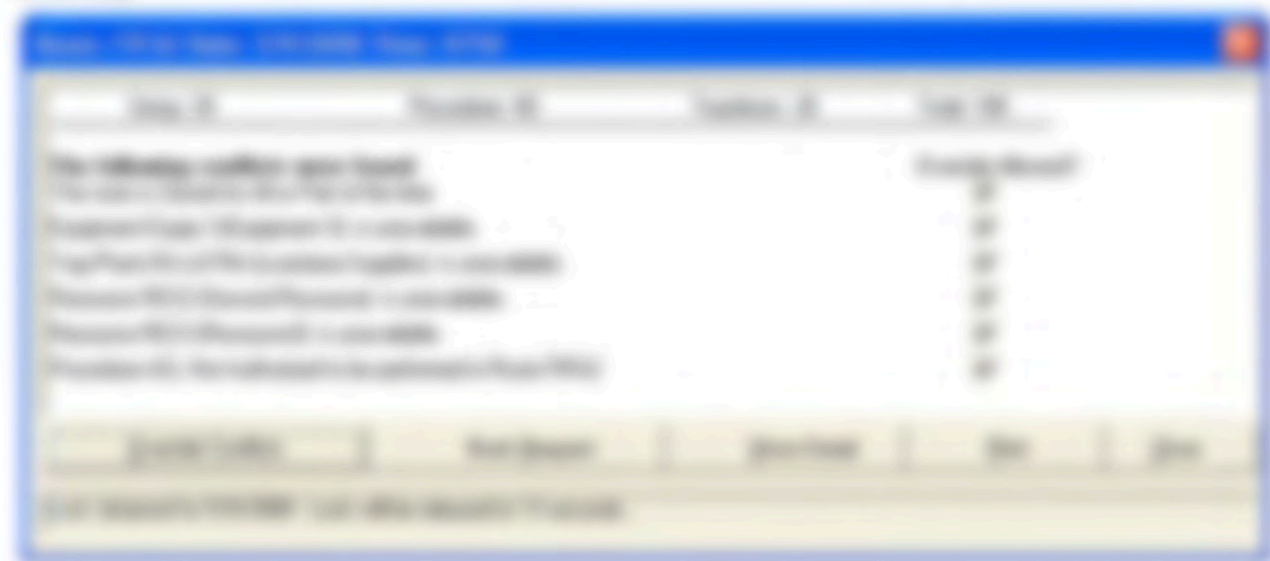
Conflict Checking

The system has options for conflict checking: **QuickConflict Check** and **Conflict Check All**.

QuickConflict Check is mandatory after moving bookings. You must use it in order to save changes.

QuickConflict Check tests for conflicts involving only the bookings that have been moved.

If conflicts are found, you see the following screen. It displays the messages, as well as up to a 100-character description inside the messages, as a note and as a link to the report. The description appears in parentheses after the messages and is separated from the message details.



The system has options:

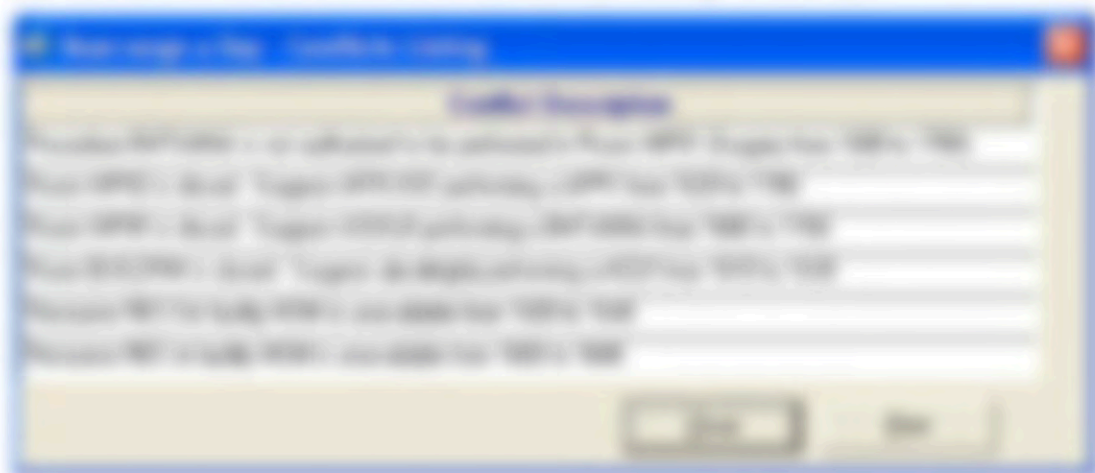
- The user controls the conflict. If you are allowed to, you can use the user interface.

Managing Bookings and Booking Tools

Managing v10.0

- You can suspend the conflict or reset the new selection. This option gives you the opportunity to go back and reset the offending bookings to eliminate the conflict. The option you choose is indicated when you click **OK**.
- If no conflicts are found, your changes are saved.

Conflict Check **OK** checks all of the days' bookings for conflicts. Its results are merely advisory; you cannot override or otherwise resolve conflicts through this screen.



See the **3D Manager Configuration Guide: Preferences** for Supporting Information.

Move a Single Booking

1. Place the cursor on the booking, right-click, and then select **Move to Booking** from the right-click menu.
The booking's information appears on the left side of the screen. It remains there until you drag the booking.
2. Click where on the grid you want to move the booking, and select **Drop Booking** from the right-click menu.
The booking appears in its new slot.

Note: If a **Booking on the Booking** is set to **True** (by default), in the **Properties** ribbon card, **3D Security Manager**, a message appears indicating that access is restricted and the booking cannot be moved up.

Move Several Bookings

1. Place the cursor on the book, right-click and select **Move Several Bookings** from the right-click menu.

Managing Bookings and Booking Tools

Managing a Day

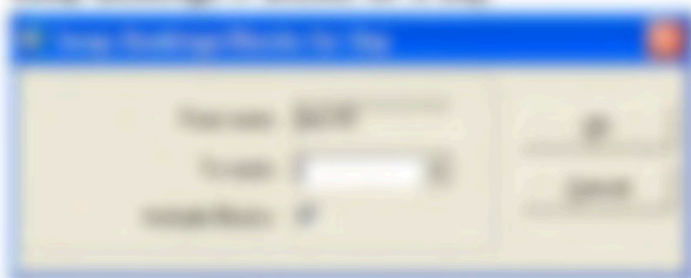
1. Enter the time range of the bookings you want to move. The system sets a booking to 60. If a procedure is scheduled from 7:00 A.M. and you enter 7:00 as the end time, the entire booking is moved.
2. Enter the room to which you are moving the booking.
3. Select a Method:
 - **End of Last Booking:** Moves bookings to the slot immediately after the end of the last booking in the room.
 - **Starting Booking:** Moves bookings to the first booking in the room, and pushes the present bookings down.
 - **Keep Room:** Schedules all the bookings in the new room.
4. Click OK.

Note: If a budget or any of the selected bookings is set to Free, this appears as the Physical Office code set in Security Manager. A message appears indicating that access is restricted and the bookings cannot be moved.

Swap Bookings or Blocks for a Day

You use the same utility to exchange a room's bookings within block times with those of another room.

1. Press the number in any slot of either of the days you want to swap, right-click, and then select **Swap Bookings or Blocks for a Day**.



2. In the room where the room you want to exchange schedules with.
3. To include block time in the swap, select **Include Blocks**. Otherwise, clear this box.
4. Click OK.

The schedules are swapped according to your instructions.

Note: If a budget or any of the selected bookings is set to Free, this appears as the Physical Office code set in Security Manager. A message appears indicating that access is restricted and the bookings cannot be moved.

Surgeon Filtering for Rearrange a Day

When a booking is created in a multiple facility environment and the system surgeon setting for facility application operation is enabled, validation of the suggestions and appointments facility events will occur in Rearrange a Day when the following operations occur:

- Drop Booking
- Drop Specific Surgeon Booking
- Drop All Surgeon Bookings
- Move Surgeon Bookings
- Drop Bookings/Blocks for Day

The system will first verify that all suggestions and appointments on the booking have applied to the facility associated with the new date. If any of the suggestions or appointments that are assigned to the booking are not authorized for the new date then a message is displayed stating that it is not authorized and the move process is aborted.

Rearrange a Day: The Booking Queue

The Booking Queue is a temporary storage place for bookings. You create the queue by moving bookings into it one at a time or by moving all the bookings for one or more weeks into it. You can move bookings from the Booking Queue to the Booking List to complete your work with the bookings. You can use the queue to store bookings while you rearrange other bookings in the grid.

Note: You can change a booking's location while it is in the queue.

Booking Queue Functions

The following sections explain how to perform Booking Queue operations:

- Move Bookings to the Queue on the next page
- View or Edit the Booking Queue on the next page
- Change the length of a Simple Booking on the next page
- Change Surgeon, Office and Procedure Times on a Complex Booking on page 125
- Move a Booking from Queue to List on page 125
- Move All Bookings from Queue to List on page 125

Managing Bookings and Booking Tools

Managing with The Booking System

Move Bookings to the Queue

- 1. Right-click on the booking and select either of the following:
 - **Move Booking to Queue**: Moves a single booking into the queue.
 - **Move Bookings to Queue**: Moves all the room's bookings for that day into the queue.

The bookings are moved into the queue, and **Queue Bookings** appears on the left side of the screen.

Note: If a booking or the bookings in a room have this status in the Properties (When you log in to Security Manager), a message appears indicating that access is restricted and the bookings cannot be moved.

How to Sort the Booking Queue

1. Select **Sort/Queue Queue** from the right-click menu or click **Queue Bookings** button. The Queue Bookings dialog opens.
2. Depending on the setting for the parameter **Display queue booking**, you can either the **Sort Order** of columns on the left side of the window or **Up** and **Down** arrows.
3. Optionally, click a column heading to sort the list by that column. Click it again to reverse the sort order.

Note: Use the horizontal scroll bar to display columns that do not appear in the window.

The order of the bookings changes based on the sort order you selected. This is the order in which bookings are arranged if you use the **Drag All Queue Bookings** option on the right-click menu to drag the bookings into a room.

4. Optionally, the **Sort Order** of columns and the **Up** and **Down** arrows give you yet another way to manage the booking queue:
 - If you use the **Sort Order** of columns you can change the order by changing the numbers assigned to the heading.
 - If you use the **Up** and **Down** arrows, you can select a booking and move it up or down the list using the arrows.
5. After you are satisfied with the booking order, click **OK**.

See also the Security Manager screen guide.

Change the Length of a Single Booking

Note: These instructions are for single bookings. Rooms with only one segment and only one provider.

1. After moving the bookings you want to change to the queue, click **Queue Bookings** to display the Queue Bookings dialog.

Managing Meetings and Meeting Tools

Rearrange a Day: Fine-Tuning Your OLI Schedule

Move a Meeting from Source to Sink

1. Right-click on the source and the sink to which you want to move the Selected Meeting. Then select **Drag Specific Selected Meeting**.
The Selected Meetings dialog appears.
2. Highlight the meeting you want to move, and click **OK**.
The meeting moves from the Meeting Source to the Meeting Sink.

Move All Meetings from Source to Sink

1. Right-click on the source and the sink to which you want the list of the selected meetings to shift, and select **Drag All Selected Meetings**.
2. All the meetings in the source move to the Meeting Sink in the order in which they are listed on the source.

Rearrange a Day: Fine-Tuning Your OLI Schedule

After using OLI Manager's Rearrange a Day screen to arrange your OLI activities for the day, you may have some fine-tuning to do. Perhaps you want to insert or delete a 15-minute gap in the schedule, or you may want to eliminate dead time in a run by putting meetings together.

The following sections explain important rules for rearranging a day:

- Insert gaps in the testing order
- Delete a gap in steps 1-5
- Remove sources from an steps 1-5
- Move a Meeting in steps 1-5
- Connect a Meeting in steps 1-5
- Disconnect a Meeting in steps 1-5
- Connect Sources and Sinks in steps 1-5

Rules for Inserting Gaps

Remember the following rules when inserting gaps:

- Inserted gaps begin at the point you click on the grid. If you insert a 15-minute gap at 10:00, the gap is from 10:00 to 10:15.
- If there is already a gap in the Meeting Sink, the inserted gap begins at the point you click on the grid. So, if there is already a 15-minute gap between 10:00 to 10:15, and you try to insert a 15-

Managing Bookings and Booking Tools

Bookings on Day-Time During Your Off-Schedule

minute gap beginning at 10:00, nothing will happen. But if you insert a 30-minute gap beginning at 10:15, a gap will be inserted until 10:45, 30 minutes from the insertion point for a total gap of 30 minutes.

- You can not break a booking in half. If you try to insert a gap in the middle of a booking, the bookings move apart, and a gap is placed before it. So if there is a booking from 10:00-11:00 and you insert a 30-minute gap at 10:30, the booking moves to 11:00, and there is a 30-minute gap from 10:30-11:00.

Insert Gap

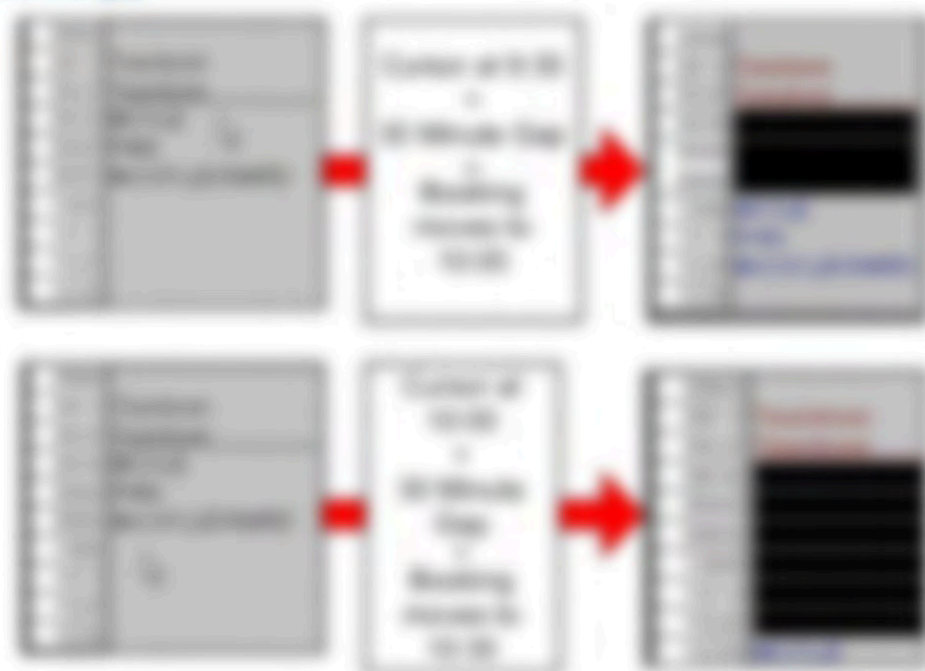
Note: Use the steps to inserting gaps in the previous step.

- Right-click where you want the gap to start and select **Insert Gap**. The insert 30-minute dialog appears.
- Enter the duration of the gap in minute increments, and click **OK**. The gap appears in the Booking tool.

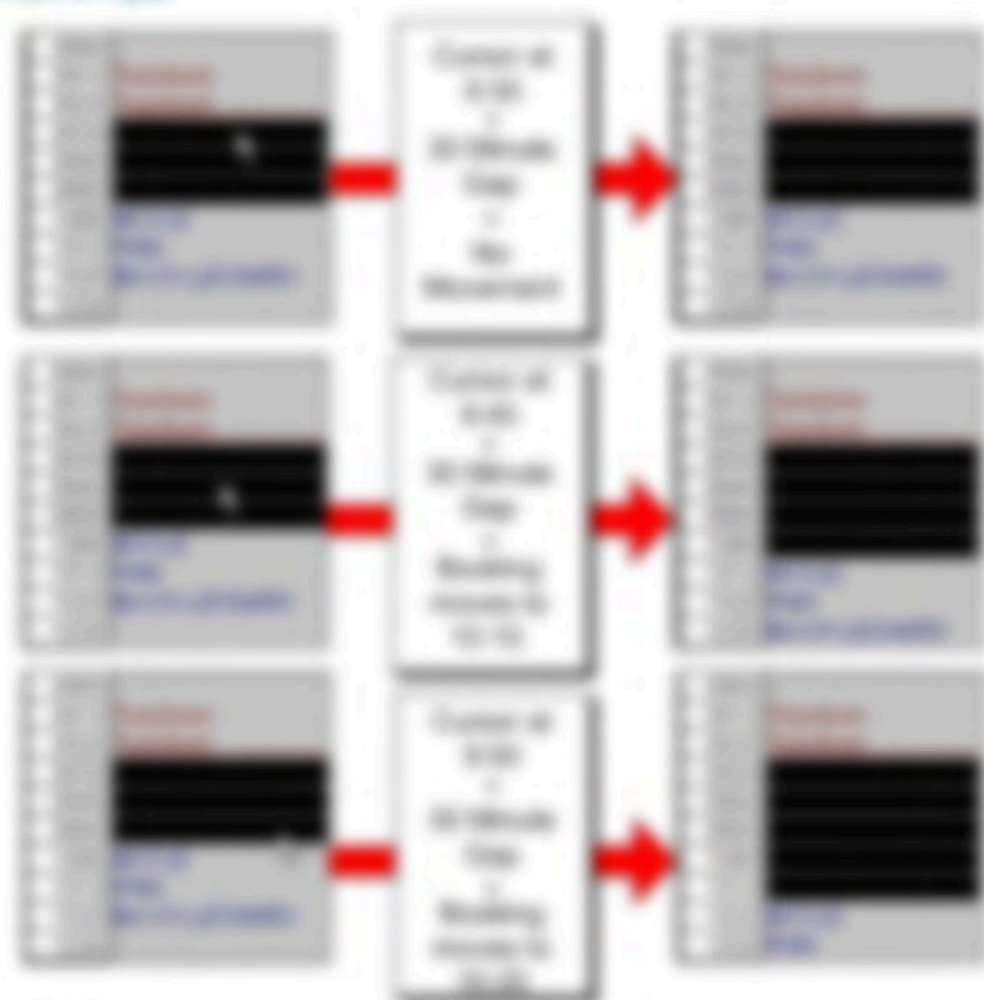
Gap Diagrams

The following examples illustrate the rules for inserting gaps.

Insert a 30-min gap



Right-click

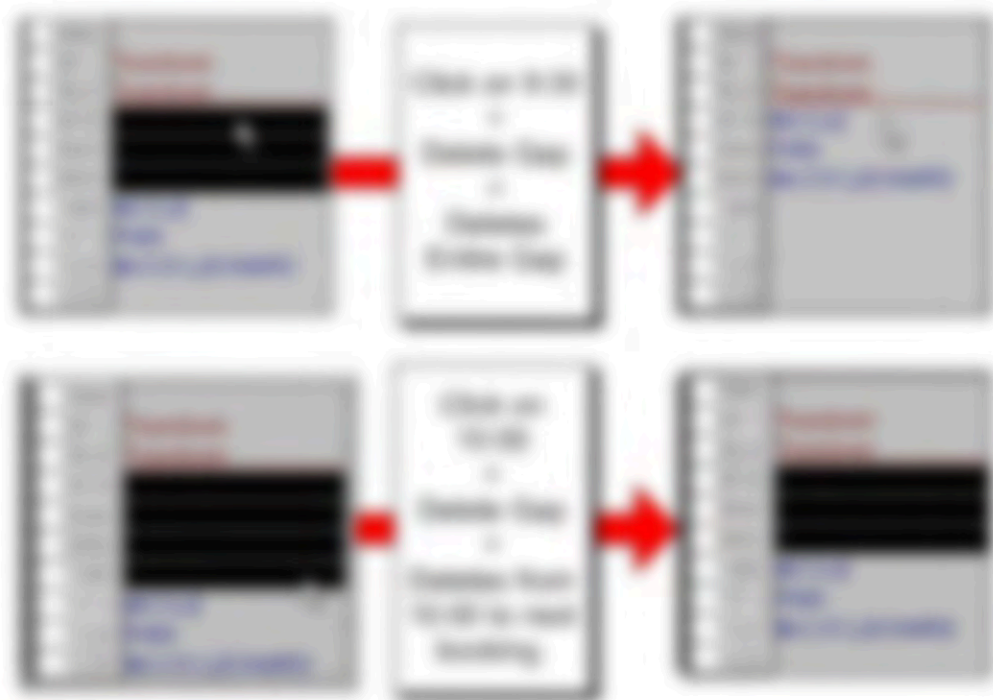


Right-click

- Right-click is a pop-up menu that you can use to delete a booking tool. The pop-up menu shows you the option to delete the booking tool.

Managing Bookings and Booking Tools

Recharge > Day View Booking Options



Remove Booking Tool

- Right-click on a room and select **Remove Booking Tool From Room**

All bookings in that room are marked up, consolidating all the bookings and removing all booking tools.

Recharge > Day View Booking Options

All Manager's Recharge > Day screen allows you to perform some basic booking management commands that include the following:

- View booking
- Cancel booking
- Mark for booking
- Mark rooms for display
- Select display tools

Managing Bookings and Booking Tools

Managing > My Work > Booking Options

New Booking

1. Right-click on the booking and select **New Booking**.
The **Booking Summary** appears.

See *New Booking Tools* on page 13.

Cancel Booking

1. Right-click on the booking and select **Cancel Booking**.
A confirmation screen appears.
2. Click **Yes**.
The **Cancellation Request** screen appears.
3. Select a **Cancellation Reason** and click **OK**.
The booking is canceled.

Note: Pressing the option bar in the screen as shown **OK** is **Cancel**.

Note: If a Manager on the Booking is set to **Yes**, this screen in the **Physician Office** will go to **Security Manager** - a message screen indicating that access is restricted and the booking cannot be canceled.

Waitlist Booking

1. Right-click on the booking and select **Waitlist Booking**. A confirmation dialog appears.
2. Click **Yes**. A dialog appears asking you to change a priority.
3. Change a **Priority** and click **OK**. Booking is wait listed.

Note: If a Manager on the Booking is set to **Yes**, this screen in the **Physician Office** will go to **Security Manager** - a message screen indicating that access is restricted and the booking cannot be waitlisted.

Cancel Rooms and Tools for Display

1. Right-click on the grid then select **Room Tools** for **Display** or **Cancel Display Tools**.
The **Room Tools/Tools for Display** screen appears.
2. Move the room/tools that you do not **Available** and **Display** columns as desired.

See *Room Tools for Display* section on page 13.

See *Cancel Display Tools* on page 13.

Block Time Inquiry

Block Tools - Block Time Inquiry

The CRM Manager Block Time Inquiry feature allows you to view scheduled block times for a specified date range. You can also track scheduled block times, or you can enter your block times to quickly check all block time use.

How Scheduled Block Times

1. Select Tools -> Block Time Inquiry. The Block Time Inquiry screen appears.
2. Enter a Start date and End date.
3. Select a Type. The filter drop-down menu changes as you change the Type. You can track more than one entry, but they must be of the same Type.
4. Click Refresh.
The Block Time Inquiry screen updates.

Request Index

What Tools in Request Index

Request Index features enable you to manage booking requests and reservations that have been made within a user-defined number of days before and after the current date. The number of days is defined in the Request Index Parameters window.

The data about the booking requests appears in the same format as data returned by the Storage Booking window. See [Working with Storage Booking](#) in step 33.

If there are requests or reservations within the time span, IFF Manager activates the red telephone icon in the IFF Manager toolbar to automatically notify you about the requests.



You can filter data the tool in **What Tools in Request Index** is using as the Storage Booking Options window, showing only the booking requests within specified time period.

Status Columns

The following Request Index columns may appear:

- Request
- Reservation

See the IFF Manager Configuration Guide: [Other Booking Definitions](#).

Case Records

Overview

Menu/Pop - Enter/Edit Case Records

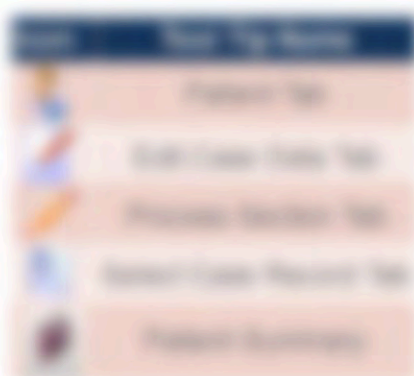
Case records are used to facilitate case documentation. Case documentation may be performed interactively by users online in the operating room, and separately by staff who staff or as a continuation of work. ICD Manager case records are maintained so you observe the record and the information they contain.

Case records hold all of the documentation related to surgical cases, such as setup and ending records as well as billing and cost information. They are fully customizable so you can capture the information that your facility needs, and change it to meet changing needs. You can link case records to bookings, materials management (BIM), and billing, so that procedures, materials, and billing data are automatically linked to them.

Note: An appendix in the ICD Manager Configuration Guide provides information about the operation between different versions of ICD codes, including the software that determines the code version in various fields as you work in the Case Record Header Section.

Case Record Toolbar

The icons are listed in the table below.



Case Record Components

Case records are made up of several elements:

- **Header Section:** Information about the case as a whole, including appointment date, time, frequency, procedures, equipment, insurance, and demographics.
- **Case Record:** This is made up of one or more sections made up of user-defined forms, called pages in case records. Sections can have one or more pages that contain pages is a different aspect of the case, such as **Interpretation Page**, **Interpretation Record**, **Notes**, **Case Record**, **Lab Data Record**, etc.
 - **Patient Data Forms:** This is made up of user-defined forms that capture patient-specific data, such as address, allergies, insurance, etc. Patient Data data is shared by all of a patient's cases. Forms that contain information are automatically updated.
 - **Case Records:** Case Record system data and Custom Form Case Record are the only user-defined sections with sections.
- **Billing/Reception Reception Setting:** When standard supply and non-supply items, quantities, and prices for the operation are entered. This feature makes it easy to record and bill for items actually used by only changing those that differ from the standard.
- Other components of case information processed through **SQL Case tab** sections, such as **Billing History** and **Cost Analysis**.

Changes, Sessions, and Procedures in Case Patient Forms

Changes, sessions, and procedures entered within the case patient forms will update the existing patient data. This changes the patient's data for all sessions because this is at the patient level. If the time a patient is added into a session, it will add or delete or edit. If Manager changes the drug, procedure, and surgical history data and structure currently exists in SQL Storage for the patient.

- Changes and sessions entered up the **SQL Case** are shown in table.

- If an alias is deleted from a subject's MMRID record it will be shown in a strikethrough font with the text "striking removed in IIR Manager". Deleted MMRID aliases are also placed after other aliases.
- Aliases are shown as underlined when they are under medication interaction checking in IIR Manager.

Formatting of Aliases

Example	Source of Use	Description of Use Format
Example	Free text	normal text
Example	Source information under	text
Example	Not under alias	normal text with a strikethrough These aliases are in the bottom of the list
Example Example	Not under MCI Free under MCI	underlined text, regardless of source, indicates medication aliases that are under for interaction checking in IIR Manager

Case Record Processing Features

Case records have several features that make processing easier and more secure:

- **Load Case Record Defaults** - loads defaults from the Case Record default dictionary so that common data does not have to be re-typed. These defaults are unique and sometimes specific and override standard defaults. Case record defaults are separately useful for shared cases where documentation data is shared.
- **Link to Booking** - links a case record to an existing booking and adds a relevant date from the booking. This is used when the original link was not made, or if the original link was incorrectly made.
- **Electronic Signature** - links for each person responsible for the case to electronically sign off on the case details.
- **Load Case Record** - This feature loads the case record in preparation for another individual to continue documentation, allowing the user to the first user to sign completely up in IIR Manager and ensuring that the staff not accountable tasks which are performed about calls.

Case Records

Case Records Usage Roadmap

When the record is created, a user immediately can log into the record using the ID and password, and view the case documentation. After log out, user returns.

Case Record Interface

The interface feature records the computer name and automatically records when in a better format case record, with date. This is so that if your system fails when you are working in case records, you will not lose the changes you have made. When the system becomes available again, you can use the Case Record Recovery feature to restore your changes.

Interface will automatically at specific time intervals. The number of minutes between interfaces is set by the programmer, with 10, 20, 30, 45, 60, 90 minutes. Note that the default setting is that interface is not enabled. The recommended setting is five minutes.

See the Security Manager Guide.

See the Case Records Configuration Guide: Case Record Definitions.

Case Records Usage Roadmap

The following steps and diagrams show how case records are used after the Case Record and Case Record Pattern files have been built.

1. **Searching a Pattern.** In order to begin a case record, you must first specify a pattern. You can also use the case as a predefined procedure, or, if the procedure is not predefined when you begin the case record perhaps at emergency request, you can enter the case procedure and pattern information before you start the case record.

See Case Records Pattern File, Procedure on page 104 and Pattern File, Record Details on page 105.

2. **Creating Case Record Defaults.** You can have IBM Manager automatically fill in case record fields by using it as a set of field-level defaults for a particular language combination. If you begin a case record for a combination of ID, device, you can have the defaults for the ID - device/language combination from the case record defaults dictionary automatically fill in many of the record's fields.

Note: If the Case Record is linked to a loading, setup and hardware times are automatically recorded from loading site.

See Case Record File, Case Record Defaults on page 105.

3. **Recording a Case.** You enter the system data into the case record during or after the procedure. Fill in the pages in each section, and close the section when it is complete.

- See the Case Data Case History for Suppliers on page 35.
1. **Order to Billing:** Case records use a billing information so that all charges, material and non-material, are recorded in the case record. You can add billing information using predefined codes, adding additional supplier code, etc.
With proper security privileges, you can also change the amount charged for both supply and non-supply items if the **Change Schedule** box in the Billing Information Code Dictionary entry for the corresponding item is selected.
For more information on the processing steps, see the following chapter in the JDE Manager Configuration Guide: **Billing Information**.
 2. **After the case record is placed in Completed status:** JDE Manager completes the information and updates it for transmission to your JDE Billing and Accounts Receivable and Material Management Systems. In addition, JDE Manager completes updates for supplier average rates for billing as well as the standard customer reports: Blank Price, Budget, and Flow.
Information from Completed cases:
See the JDE Manager Configuration Guide: **Transmitting Changes and Supplies**.



Case Record Screen

Chapter Contents

This chapter covers the following:

- Case Record Screen Overview
- Case Records History Tab Overview
- History Tab Search Results
- History Tab Search Case
- History Tab History Case History
- Select Case Record Tab
- Details Screen Overview
- Add Case Data Tab
- Add Case Data Tab Buttons
- Add Case Data Tab Filter Case Buttons
- Add Case Data Tab Annotations History
- Record as History
- Add Case Data Tab Case Overview
- Add Case Data Tab Case Overview

You can also create a new user account from Storage Manager's User Management. The User Account Setup tab, located on page 10, will allow you to create new users and assign rights and through searching to restrict to the contents of existing or new user groups.

- **Index Type = Storage Type Records** Storage Type Records enables searching for user records by a wide range and many combinations of criteria.
- **Index Type = Indexed Type Records**
- **Index Type = Record Types** This selection provides you with a menu of up to 16 of your most records, which users

This can also affect all existing users except for existing users being forced.

See www.fishbase.org for information on how to find and add new records from the Marine Life Inventory project.

The Integrated Case Report appears in the final part of the JGIM manuscript review system. It is here that you create your overall report, add comments and drawings with your report, and add cases.

Most of the forms used in the Case Records screen are custom written for your facility to suit your needs.

Case Record Table



The Case Records screen has the following table:

- Table:** The first table Case Record screen appears is the **Table** tab. Because all of the forms in the **Table** tab are specific to your site, the **Table** tab may look different than the images presented in this guide. The **Table** tab serves two functions:
 - As a search screen to find the patient whose case record you want to work with. If the patient is not in your database, you can create a new patient record.
 - To enter or add information about the patient into the case without patient case forms after the patient record is found or created.
- Select Case Record:** After the **Table** is selected, you use the **Select Case Record** tab to select an existing case record or to create a new one.
- Full Case Record:** After a case record is selected or created, you use the **Full Case Record** tab to enter or add data in the appropriate sections of the case record. In addition to the case-related sections, the **Full Case Record** tab contains a number of features that allow you to either connect to existing, adding, or creating such things as test orders, billing history, and supplies used on your case record.
- Previous Section:** Shows the selected section.
- Patient Summary:** When you go into the Broadview Manager Patient Summary from an active case record in EM Manager, a summary overview appears of the patient summary. It is available for viewing because the patient has not yet been admitted to Broadview Manager. If the patient previously has been transferred or discharged to Broadview Manager, when the Patient Summary is successfully created, data is displayed. The **Table** is captured in the Case Record form. For **EM Manager Tools - New Audit Tool** and **History** at 11/11/2011. The format of the Patient Summary is governed by the configuration template being used by the selected Broadview Manager system. See the **Introduction** page, **Tools** for details of how to use Patient Summary and the **System Configuration** book for configuration details.

The Patient Summary is available only in a read-only mode with the following functions available:

- Change the viewing period
- View notes, history and viewing the notes audit trail
- View event reports
- Print summary, notes and event reports

Case Records Patient Tab Overview

In a similar way to bookings, the case records the Patient tab also has two modes: **Basic Patient Information** and **Forms**.

- **Basic Patient Information** mode is displayed when you create a case record. It provides demographic fields for you to search for a patient in the CRM Manager case record system or add a patient. You can also use this mode to create a new patient in the CRM Manager case record system. After you enter a patient for the case, you can no longer edit the basic patient information that you add with records that is a read-only mode.
- **Forms** mode is displayed automatically after selecting the patient for the case. Patient forms are listed on the right and the first is selected and displayed by default. They are used to collect information about the patient. Forms are configurable; they differ from one hospital to the next.

Basic Patient Information Mode

The screenshot displays the 'Basic Patient Information' mode in the CRM Manager case record system. The interface includes a top navigation bar with links for 'Home', 'Bookings', 'Case Records', and 'Reports'. Below the navigation bar is a toolbar with icons for adding, editing, and deleting records. The main content area is titled 'Basic Patient Information' and contains a form with fields for 'Name', 'Address', 'Phone', and 'Email'. To the right of the form is a sidebar with a list of 'Forms' including 'New', 'Edit', 'Delete', 'Add', 'Update', and 'Remove'.

Form Mode

The screenshot shows a web application window titled 'Form Mode'. It contains a patient selection dropdown, a date field, and a list of form fields for patient information and medical history. The form is titled 'Form Mode' and includes a 'Save' button at the bottom right.

Form mode opens automatically after selecting the patient and filling in the basic patient details for a new case record.

Patient data forms are configured by your hospital.

For information on setting and creating forms for your site, search for "Form Definition Overview" in the eM-Manager Configuration Guide.

Note: An ellipsis (...) at the end of a field indicates that the text is too long to be shown on the form. You can click the field to see the full text. Note also that any content underneath of the form will only show the truncated text, just like the form.

Class Record Patient Tab Toolbar Buttons

The available buttons depend on the mode.

Patient Basic Information Mode



Case Record Screen

Case Records Patient List Overview

	Search the CR Manager case record system
	Search the CR
	Selects the first patient whose forms were updated
	Create a new patient in the CR Manager case record system
	Clear the search field
	Save the currently selected patient to the case record

Forma Ready



	Forma changes
	Search is a different patient Since this button is only available while you are creating a case record it does not change the patient assigned to an existing case. For information on changing the patient assigned to an existing case, see Change Patient in page 2.10

Patient Tab: Patient Search Options

Search Options

Best Practice: First, recommend that you search for a patient using different methods in the order shown below until you find a match.

1. Search the ICD Manager database. Patients in the ICD Manager database have previously had surgery at your facility.

Note: If a patient will only be found if a case record was previously created for that patient in the system, if a patient has a listing in the ICD Manager system, but not a case record, no match will be found.

If the patient is not found, ICD Manager asks if you want to do an ICD search.

2. Search the ICD for patients who have been previously identified at your facility but have not had surgery there in the ICD system.

If the patient is not found, ICD Manager asks if you want to do a Secondary search.

3. The Secondary Search option is offered when ICD Manager cannot find a match in the ICD despite doing an update to the ICD system. The Secondary Search looks for alternate combinations that may not exactly match what you put in the **Name** box but are close.

Example: Typing in "test" could bring up patients: **Testy, Test** and **Testis**.

Note: Only if you cannot find a match with the previous methods, should you create a new patient record which gets added to the ICD Manager case record system.

Search Option Notes

- The information you must type in to perform a patient search is controlled by a setting in Security Manager. Recommendations are the use of the following:
 - Exact name plus ICD, date of birth, or unit ID
 - Partial name plus ICD, date of birth, or unit ID
 - No restrictions, meaning that you can enter partial name, ICD, date of birth, and/or unit ID

Case Record Screen

Patient Tab: Search Details

- You can double the **New Patient** button and run an ICD Manager database search and ICD search have been conducted. The feature makes it more difficult to inadvertently add duplicate patients to the database. Contact the ICD team leader for more information.
See the Security Manager user guide for more details.
- See *Searching and Query Process* (chapter 12) for an explanation of what happens in the system when you choose various options.

Patient Tab: Search Details

Account Number searches

New Patient: Search by account number alternative profile.

You must enter the complete account number, including zeros, spaces etc.

Unit Number searches

You must enter the complete patient unit number, including zeros, spaces, etc. Leading zeros may be omitted.

Patient Name Searches

Search name **Search by** **From**

You can enter a full or partial name.

Example: If you enter "J" patients whose last name starts with "J" are listed.

Multiple word search

When searching by name using multiple words, ICD Manager searches the following word order:
Last - First - Middle - Suffix

Example:
If you enter the last name last the first the result is automatically interpreted as follows:
Last - John
First - Joe
Middle - M

Case Record Screen

Review Case Record Screen

Note: The fastest and most reliable search method is to enter the patient's Record Number.

1. Use the method for the Search String tool, as required.

2. Click the Patient Search button  to search the CR Manager case record system or the CR Search button  to search your CR system.

The buttons at the bottom take the patients who meet your criteria.

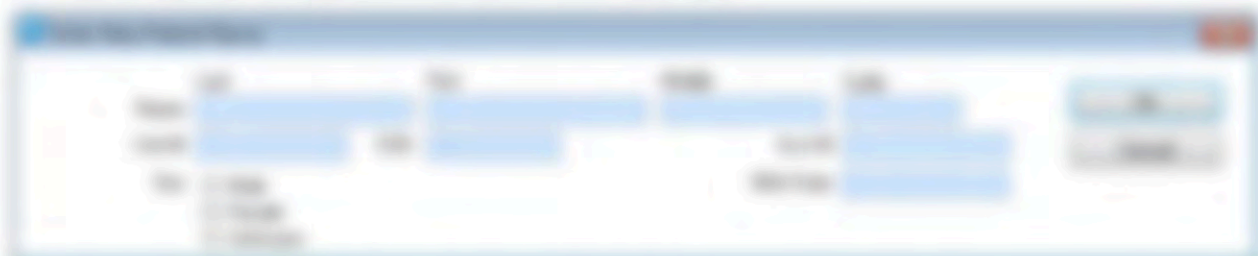
3. Double-click the patient's name or select the patient and click the Select button .

Note: Instead of clicking Select in the last step, you may want to use the Search Case button, which enables you to select the selected patient with a limited procedure in order to make creating a case record much faster. See Chapter 10, Search Case at page 175.

Create a new patient in the CR Manager case record system

Note: Before entering a new patient, you should be certain the patient is not already in the CR Manager case record system or the CR system.

1. Click the New Patient button .
2. Add or edit the new patient information. Then click OK.



Note: The values entered for field ID, MRN, Birth Date, and other fields in this screen are copied automatically to the case record patient data. This case number is copied for an additional case for a tracking patient with a case number with 7 as document number prefix.

Note: Patients entered as New Patients do not have an Account Number or Case Number and cannot be added with they are identified through your hospital's administrative system and the case record is added to the patient. As an alternative, you can assign an account and case number after ICD Manager by using the Change Patient feature in Manage Case Records. After the case is assigned account and case numbers, any patient data entered in case records is associated by the information entered via admissions.

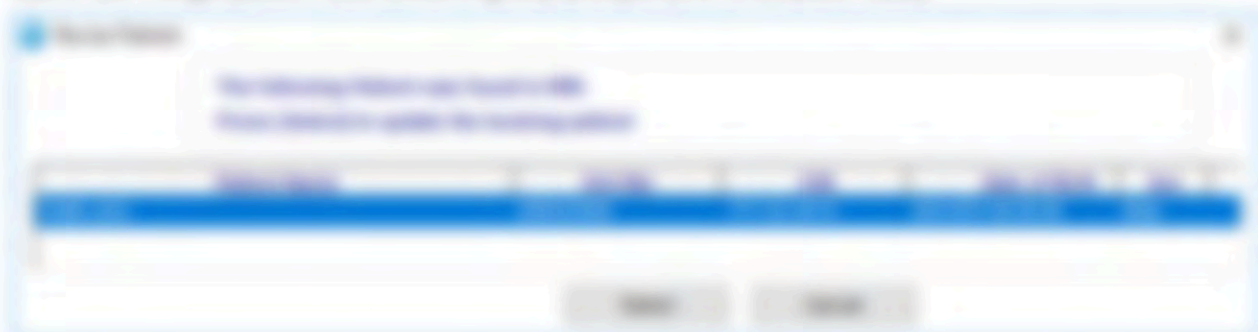
Note: There is a permanent background patient search in double the New Patient button and also case record ICD Manager admissions in both. This feature ensures that users search for existing patients before entering a new patient in the database.

See the Security Manager User Guide

See about the built-in on page 35

Review on Worksheet

When entering a case from a hospital for a patient that was entered directly into ICD Manager, users are able to change an ICD patient. In such a scenario, a Review Patient message appears so users can merge patient data including any preoperative evaluation data.



When a patient merge occurs only the current hospital's data will be updated. If any other hospital exists in the system for the patient the case record data for that hospital will not be updated.

To enable this function, the flag merge patient on admission must be set to Y via Application Parameters in the Security Manager. For details on the application parameters see the Security Manager User Guide.

Patient Tab: Quick Case

The Quick Case feature allows you to create case records by selecting the heading for which you want to create a case record. All you have to do is specify the patient and the date of the operation.

Use Quick Case

1. Enter the search criteria in the Search/Find Case Record screen's **Find** tab as you would for creating or editing any case record. See [Search for a Patient](#) on page 10.

Note: When creating a case via **Find/Find** and performing a quick case, a list of headings is displayed based on date and patients with a certain name. If the heading, patient and case record patient and numbers are different, a warning message is displayed, and clicking **OK** returns the user to the list of headings for re-selection.

2. After you have selected a patient from the search list, enter a **Heading Date** at the bottom of the screen, or keep the current date, which is the default.
3. Click **Quick Case**.

Quick Case leads to an operation for the patient you selected on the date you specified.

Quick Case Result	Action Result or Result
one match	It goes through a validation process and creates a new case record with the patient number information already there is. The new case record opens directly in the Search/Find Case Record screen.
one match but a case record already exists for it	It asks you if you want to create another case record for the same operation. If yes, it goes through the process of creating a new case record as described above. If not, it opens the current case record for editing.
multiple matches	It displays a selection screen showing all of the matching operations. Select which of the operations to create a case record for.
no matches	It displays the first page of the Case Record screen for you to enter patient and other information for the same way you would do it in a regular Case Record situation.

4. Enter and edit data in the case record as you would in any other case record.

Notes about Quick Case

- Quick Case only finds bookings that were made in the facility you selected for entering and editing notes. It is important that you choose the right facility before entering the Quick Case Record screen.
- Quick Case only finds the bookings for operations that are to be performed on a particular patient on the date you specify.
- You cannot link a booking to more than one case record.
- The default **Booking Date** is the current date unless it is set to another date by a previously saved case plan. You can override the default date to enter any date you choose.

See the Security Manager User Guide.

Patient Tab: Patient Data Forms

The **Patient** tab is made up of any number of user-defined patient data forms. The data in these forms is stored among all of the cases for the same patient. The tab is always available when working with the case record.

Audit Trail

If administrative users are permitted for you, you may use the audit trail immediately to the left of the data for a field.



The icon indicates that the field value was changed and saved more than once. You can click the audit trail icon to see the **Field Change Audit Trail** screen for the field. The **Field Change Audit Trail** screen provides information about changes to the values in the field. For more information about the **Field Change Audit Trail** screen, see **User Manual Book: Tools on page 22**.

If two users are working with fields in the same form, changes made by one user are not shown by opening the audit trail or making the user visible to the other user until the other user leaves the form and returns to it.

Buttons

The buttons in the lower right of the screen offer the following choices:

- **Change Patient** returns you to the select screen for a different patient after you have selected this patient.

Case Record Screen

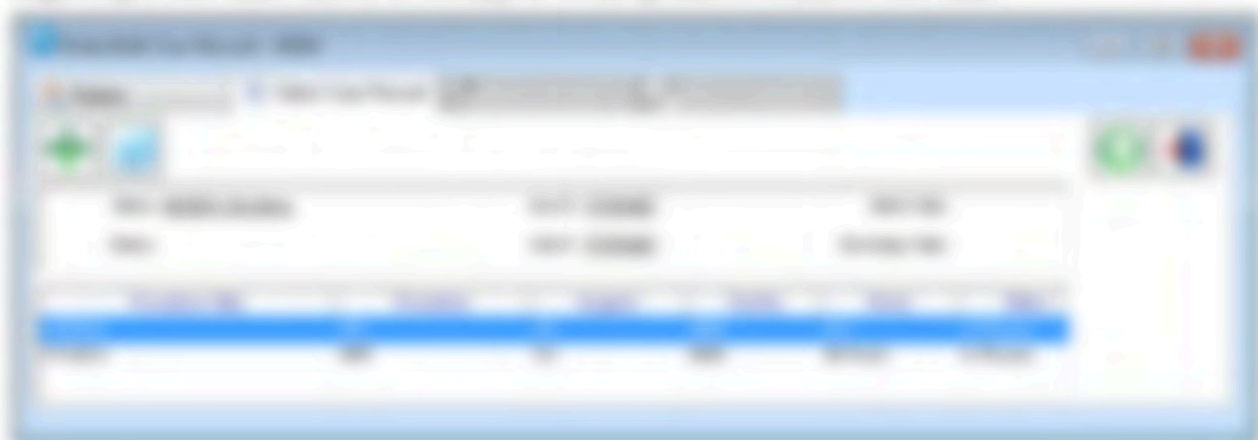
Select Case Record Tab

Note: Using this feature does not transfer any case record to a new patient. The rights as specified in the existing patient case transfer to the new case. See [Transfer Patient to a new UICW](#) to change the patient or a case in this way.

- Save across the changes you made after checking that the mandatory and recommended fields are complete.
- Close onto the screen after making use of any proposed changes.

Select Case Record Tab

The **Select Case Record** tab is used after a patient has been selected for an existing case, beginning a new case record, or to copy an existing case to create a new case.



Copy Case

The **Copy Case** feature copies patient, header and case field information from a previous case into a new case record.

For example, you could use this feature with case management cases since many of these cases are only entered in one place. The user selects, copy the first case to create a new case with much of the case management information from the first case defaulting into the new case, so that you avoid having to re-enter the same information.

Since this is occurring under the same user and account number, if the account number is coming in the first the user will use the copy case feature to quickly create a case and all the data from the first case defaults into the second.

Steps to New Case Record

1. Click **New** on the **Header Case Record** tab.

Clicking on **Header Case Record** opens a screen allowing you to link the case record to an existing **Incident**.

2. Link the case record to a **Incident**, if applicable. If the procedure has been recorded in **Off Management**, the system automatically fills in the header section of the case record for you. To edit it, go to the following:

- **Header Section** to search by **Name** and **Date of Booking**
- **Header Section** to search by **Name** and **Date of Booking**
- Select a record from the resulting list to link the booking to the case record. Then click **Save**.

The **Header Case Record** will appear as:

Note: The system will not allow you to link a booking to more than one case.

Note: If a booking includes **Police Notification** data, that data is displayed in a case record created from the booking.

3. If the procedure has not been recorded in the **Off Management** system, click **Cancel**. The **Header Case Record** screen appears.

See **Header Case Record** screen below.

Header Section Screen

The **Header Section** screen is used to search records during queries and to add booking data into the case.

Case Record Screen

Header Section Screen

Use the **Header Section Screen** to enter or edit case-specific information, such as procedures, equipment, equipment, and data that appear in the headings of the screens for this case. If a case is linked from a heading, most of the data on this screen is automatically pulled in from the heading. If the actual case data is different from the heading data that is pulled in, you need to update the appropriate fields as necessary.

If you try to access the **Process Header** when another user has a session of the same case open, a message appears as notification. There is a session open and displays all the current sessions as a list. This message allows you to click **OK** or **Cancel**. Clicking **OK** opens the **Process Header** in their state, and **Cancel** returns you to the previous screen.

The message displays whenever a user starts **Process Header** and another session is open. Regardless of the user or workstation including the same user from the same machine... a different notification appears when a user starts **Header** in a case while the session is already opened, but this message you to click **OK** to continue.

2. Workflow: The **Writing History** button creates another when accessing the **Process Header** in this flow mode. The **Supplies**, **Test Analysis**, **Flow**, and **Flow** buttons are always disabled. Failure to update the **Header Screen** will corrupts case data results is represented in most standard off storage internal reports and intelligence. This is important as all off storage case reports and intelligence use **Header** data in the respective calculations. For example, the **Flow** flow calculation report and **Supplies** calculation report use the **Header** **Flow**, **Supplies**, and **Flow** entered in the computer case record for calculation. Growth of **Header** field data is correct upon completion of the case record.

Note: The **Supplies**, **Process**, **Equipment**, etc. buttons are disabled in the same way as they are in the off-heading screen.

Case Record Screen

Edit Case Data Tab

The buttons in the lower right of the screen are duplicates of some of the buttons on the Case Data tab. However, the Duplicate History screen (activated by the DuplicateHistory button) is slightly different from the screen shown through the Case Data tab. It does not allow you to delete.

See also Case Data Tab Buttons on the next page.

Important Notes

- You must capture case data and make all necessary changes in the screen because the standard statistical reports use data from this screen only.
- Since the header information controls the billing codes and service screens, you should always check this screen for accuracy when you create a case record.
- You should always check this screen for accuracy before completing a case.
- Do not make actual charges, procedures, etc., case data elsewhere. It appears such as user-defined screens, because it will result in inaccurate statistical report output.
- You might choose to add a field to user-defined screens reminding the user to update the header if a change occurs.
- If you enter a case record that uses unclassified equipment, you can remove the unclassified equipment and add authorized equipment, but it is not possible to add unclassified equipment. The case record is then over with the unclassified equipment.

Edit Case Data Tab

After you have located or created the case record for a patient, you use the Edit Case Record tab to work with the case record. The case record consists of user-defined forms, or sections. In addition to these sections, the Edit Case Record tab contains buttons that allow you to enter screens for entering, editing, or viewing such things as user attributes, billing history, supplies, and the ability to view all sections of a case record.

Edit Case Data Tab Example

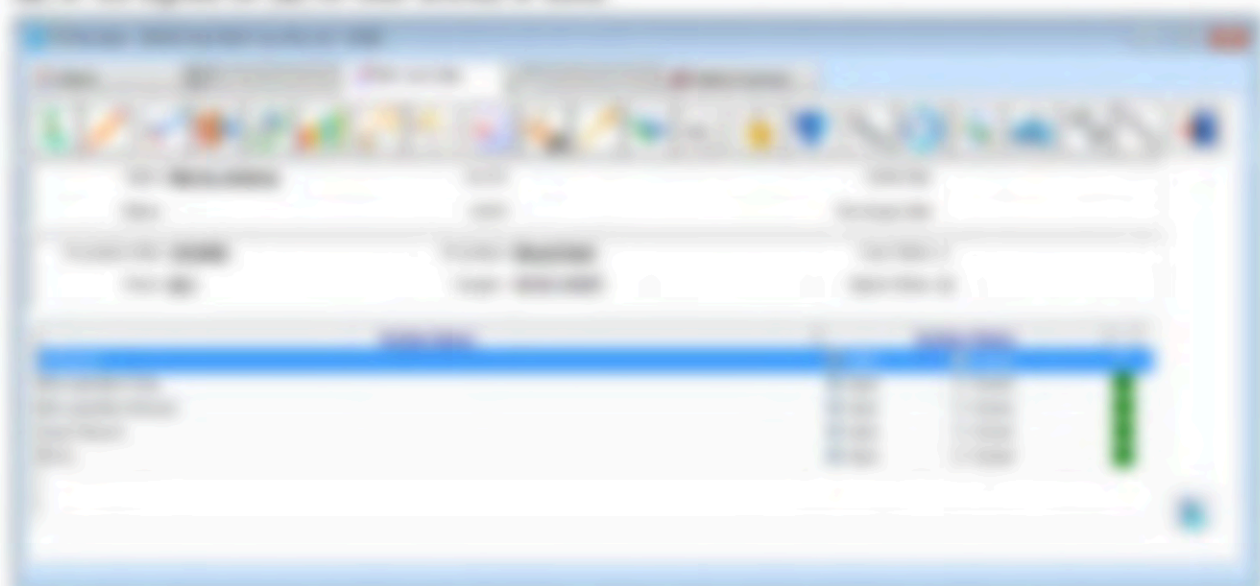
The example below illustrates what you see when you first open the Edit Case Data tab. Because sections are custom-defined, the number of sections as well as the names of the sections you see may be different than shown.

- The information at the top of the tab is from the header information you entered in the header section screen or was pulled in from the loadings module.
 - Case Status tells you if the case is Complete (C), or In Progress (I).

Case Record Screen

Edit Case Data Tab: Buttons

- Report Status** tells you whether all users involved in recording this case have signed off. If so, an report of all off on that screen is able.



- The bar in the lower left side displays the sections of the case, as well as the status of each section. The **Section Status** column tells you whether the section is open or closed. This stops each section after completing it. It also tells you whether you have the security access to edit the section.
 - Open:** You can edit the section.
 - Yellow:** You can view but not edit the section.
 - Red:** You cannot access the section.
- The buttons in the lower right side enable you to modify the header information and section information, as well as giving you access to such things as filing and cost analysis data. These buttons are described in the following pages.

Edit Case Data Tab: Buttons

The buttons on the **Edit Case Data** tab enable you to edit header information and Case Sections, as well as give you access to other case-related screens such as Billing History and Cost Analysis. Button availability is based on individual user access.

Add Case Record Data Screen

Icon	Function
	Previous Record
	Previous Screen
	Save/Save & Print
	Refresh
	Display History
	Case History
	New Page
	Print Page
	Case Case Record Database
	Database Upgrade
	Get Record/History
	Change Case Status
	Case Case Record
	Print Case Record
	Print Case Record
	Print Case Record
	Print Case Record
	Print Case Record
	Print Case Record
	Print Case Record
	Print Case Record

Buttons Table

This table gives a short description of each button and, if necessary, points you to more information about the functions the buttons execute. It also provides the shortcut key combination which allows you to execute the actions from your keyboard.

Feature	Description
Process Header	Process Header brings up the Header Section screen for editing. Process Header Screen on page 20.
Process Section	Brings up the highlighted Case Record Section for editing. Case Data Tab, Using Case Sections on page 20.
Supplier Billing	Supplier records and non-supplier items used and billed for during the operation and allows description editing. Case Data Tab, Supplier Billing on page 20.
Upgrade	Changes all Manager and MGR items defined as upgrades, including Tag/Placards defined as upgrades. The functions available on this screen are similar to those described in Insert as Upgrade on page 20. Upgrades under Upgrade to enter new items that are a NEW Tag/Placard . Item Mode is available in this screen. For an explanation of Item Mode entries, see Case Data Operations on page 20.
Billing History	Brings up the Billing History screen. Item history only after a case is placed in Computer using. The column Count and HZ indicates each item is inputted. The column Total HZ indicates items that appear due to selection of an option. Item Mode is off in Change for individual items, and Item is not displayed in the Billing History or Billing History Report.
Cost Analysis	Shows the cost of all supply and non-supply items used in the operation by category. Case Data Tab, Cost Analysis on page 20.
Print Case	Prints the case record in one of two formats. The default format is all by operation category with record print. Default if not in the long is 0 is a list. An option all items or others, which is three sets: 1.
Plot Statistics	Records and displays this statistics in a graph. Case Data Tab, Plot Statistics
MGR Subscreen	Changes case record fields set to MGR Subscreen and their responses. For more information on the preceding topic, see the following chapter in the All Manager Configuration Guide: MGR instructions and Subscreen.

Button	Description
Copy/Paste Case Data Information	Transfer entire page the information from the Copy/Paste Information
Copy Case Data	Transfer the case record Case Data values screen See Case Data Tab Case Data Screen on page 10
Load Case Record Defaults	Load the defaults from the Case Record Default screen. The button shows you a list of standard case record information for cases using this project and provides other data being in order to be used. These default records are standard defaults assigned after building fields in order to provide you with the case record defaults you are using. The case information you are entering into the system will be entered into the system. See Case Data Tab Case Record Defaults on page 10
Link to Existing Record	Bring up the link to Existing screen so you can link the case record to an existing record. See Link to Existing Record on page 10. This is used when you are ready after the case record was started. It is also used if the case was initially linked to the wrong existing. Linking a case to a existing after the case record is started connects the record entered in the fields that are affected by the link. Linking a case to a different existing will break the link and connect the case to the previous link. If a Case Management Information site, if an add-on case record has been created with no link to a existing, and a change button after attempt to link the add-on case to a existing with a different ID# from the add-on case ID#, a message appears. The message requests the correct existing address in the location of an add-on case to the selected address. The change button after is not accepted, and clicking  on the message displays the link to Existing screen with no search results.
Link Existing Link	Shows you to create the link to an existing existing.
Previous Page	Shows you to electronically page your position of the case record using your page up.

Buttons	Description
Case Signoff/Printing	Bring up the Case Signoff/Printing screen where the case user can sign off on the case record and whether results has signed off on it (signed off means that the case is pending sign-off).
Change Case Status	Changes the case status from Complete to in Process and vice versa. Cases must be closed in a Complete status for getting to the sub-report and additional information is the complete.
Link Case Records	Link the case record with another case sign in. Taking the action has the following effects: - Close the Storage Bindings screen where you enter selection options. - Close the Storage Bindings Options screen, which displays selected results. - Close the Storage Case Records - Selection screen where you enter selection options. - Close the Storage Case Records screen, which displays selected results. - Close the Schedule screen. - Close Tracking screen. If other screens are open, a message reports that you are unable to link.
Flag Case Audit Trail	Link changes to data field in the case record. Also available from the Storage Case Records Results screen. See Case Record Audit Trail on page 127 for complete information on using the audit trail screen. You can also display individual field audit trails from within case records using Case Record on the Web. See Case Record Trail on page 127.

Section	Description
Provide New Supply or Provide New Supplies	The section supplies information for following: Provide New Supply/Provide New Supplies for cases where Case Status has been changed from Completed to Unsupplied. Provide New Supply means new supply changes are to be submitted as current case information. That is, new supply changes made after re-opening the case will be included in the case calculations. Provide New Supplies means that no new changes are to be submitted as a result of re-opening a case. The default can be either to provide or to Provide new supplies, depending on setting for provide or, sufficient, unsupplied. For more information on the preceding topic, see the Security Manager user book.
Full Worksheet	Allows users to change information about their a particular facility.
Close	Closes the Case Record screen.
Close All	Closes all the sections of the Case Record that the user has the appropriate access to do so. This button is inactive when all the sections are closed, or if the user is restricted from closing the sections that may contain open.

Edit Case Data Tab: Filling Out Sections

There are two ways to fill out your case records:

- Interoperatively** Online in the system in the operating mode.
 If you have a PC in the operating room with EM Manager installed, you can fill out the case records while the procedure is taking place.
- Post-Operatively** Following the operation.
 If you do not have a PC with EM Manager in the operating room, you must have a paper record of your case data and enter some or all of the case data into case records after the operation.

Remember that case record sections and pages are user-defined. The operations that control which sections and pages appear for particular facilities and procedures are found in user-defined sections.

Create Record Section

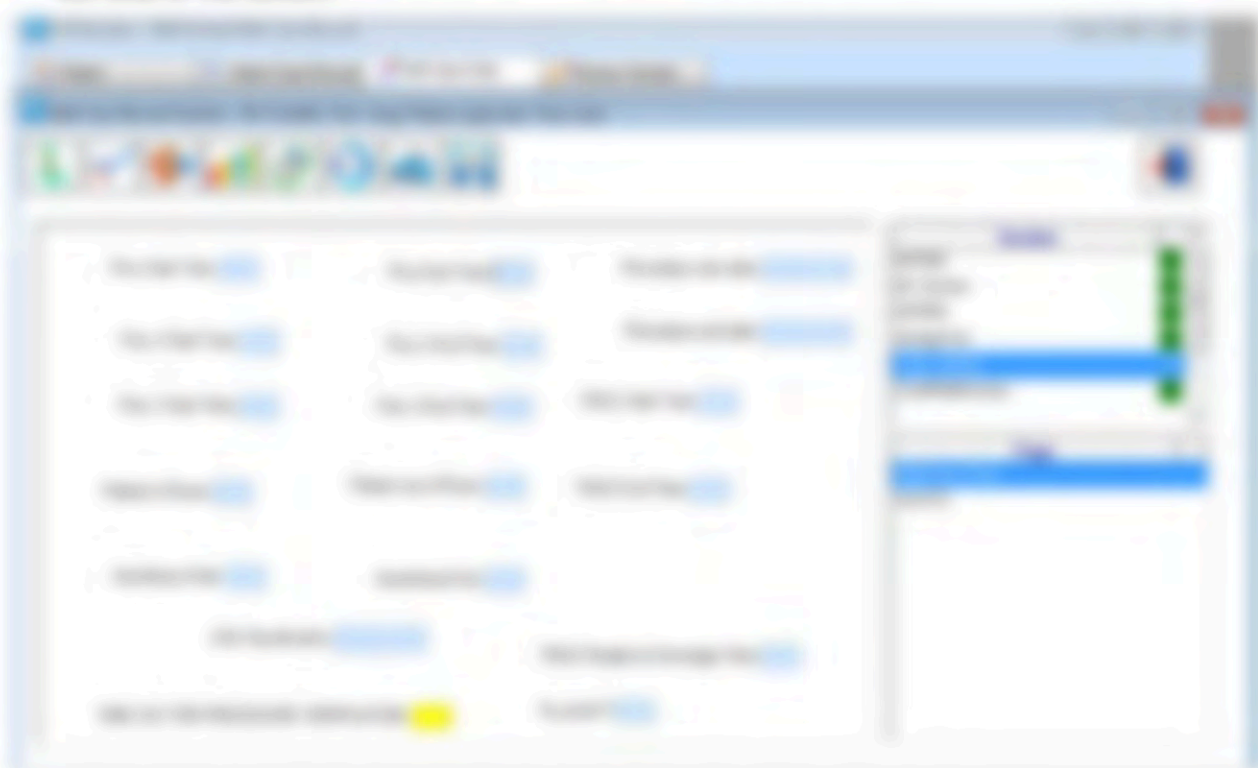
See [Create Data Table Using the Builders](#)

See the [DB Manager Configuration Guide](#) for Defined Forms.

Use Data Record Section

1. Double-click on the **Section** you want to add the section set to double-click open the **Section** table builder, or highlight the **Section** and click **Process Section**.

The Data Table Record Section screen opens with the first page of the selected section on the left side of the screen.



2. Click on text in the Page screen to select the page of the section to edit.
The page you highlighted appears on the left side of the screen.
3. Click on text in the Section screen to select another section of the data record.
The section you selected appears on the left side of the screen with the first page open and ready for editing.
4. Click on any of the fields in the section to enter, edit, or select any of the data input options.

Note: Fields with red backgrounds are mandatory. Those with yellow backgrounds are recommended.

- Click any of the buttons in the lower right to save, edit or add other user record data without having to return to the first screen of the **ADD User Record** set.

Note: If you have entered data in a window, and then decide that you want to quit it is possible only to be added up, and then delete the data.

Automatic Log Out and Logging In After Time

Automatic log out of an inactive user is controlled by parameters set by administrators.

After the period shown in the message window, a log out screen appears.

If the current user needs ability to user record or user record without data without saving, and is automatically logged out, and then a second user attempts to log in, a message is displayed to inform the second user about the first user's data and to provide options.

Click **OK** to delete the first user's work and close all messages. Click **Cancel** to retain the first user's work and display the login screen for the second user.

See **Database Fields** on page 10.

See **Add User Data Tab Buttons** on page 105.

Buttons

Use this table to find more information on the buttons in the user records sections.

Action	Description
Print Data	Prints the user record in Database Record, User Record, Group Record, Member User Record, Print History, or Member User Record Print History. If data is displaying in list or table, the screen will display an options, which is Print table (1).
Print Member	Brings up a print reference screen to see the suggestions and procedures for the user.
Save	Saves the data in the screen.
Get Windows	Shows user to change reference data from a particular window. Resumptions from previous Windows Records is prohibited and presents a warning message if attempted.

Note: Fields you do not have access to on the screen's page are displayed but cannot edit on the Windows screen.

See the [JDF Manager Configuration Guide: Case Definition Screens](#).

Using Word Processing Fields

Word processing JDF fields in case records have some unique features. A separate setting controls whether you edit them with the Free Word Processor or with Microsoft Word. If you are using the Free Word Processor, in addition to entering the text text, you can use the **Comment** tool menu to insert your written notes into documents. The **Comment** tool menu is not available in Microsoft Word.

Case record JDF documents can be set up to use different screens to be associated with particular body images or categories of comment text. However, a document used can be set up for comment text in advance; you can use the **Comment** tool menu from any document at any time to insert comment text to use in your document or change the body image and/or comment text already associated with it.

Note: Microsoft Word requires Word to be installed in order to avoid potential error messages when opening Word fields.

See the [JDF Manager Configuration Guide: Comment Text and Body Images](#).

Field Audit Trails

An audit trail is available on any case-defined field in a case record by using **Field Audit** on the field. It is shown as a field in a column on the **Field Audit** field. Field audit brings up a table:

- **Select Filter:** Lists only entries that contain the same data as the field you selected.
- **Table Filter:** Removes all data and displays audit trails for all the fields in the case record.

Edit Case Data Tab: Exception Noting

The **Exception Noting** screen displays the items, quantities, and changes from the predecessor work and the billing rules associated with the case. You can modify items and quantities to reflect those actually used during the project.

The following sections discuss important exception noting tasks:

- [Modify a Case Quantity Item on page 122](#)
- [Add a Blank Item on page 122](#)

Case Record Screen

How Case Data Is Stored in the Exception History

- **Stacks a stack item** on page 135
- **Stacks a stack item** on page 135
- **Set a TrapHandler** on page 135
- **Stacks a TrapHandler stack item** on page 135
- **Support a Preference List** on page 135
- **Supports finding exceptions** on page 135
- **Exception history and filling** on page 135
- **Exception history stack** on page 135

The term “exception filling” describes the action by means of recording the action to add additional exceptions or stack items to support operations used to support changes (change without filling code only).

Information derived from the exception history process directly includes the following:

- **Stacks changes recorded back to the filling system**
- **Stacks items as needed within 32 storage for user code analysis**
- **Stacks items to support automated numbering within 32 system**

There is a problem the exception history accurately results in representation in all the above. It is therefore important that actions are performed as anticipated that ensure exception filling is performed accurately. This includes a comprehensive action to audit the exception history process. See **How to Audit the Exception History** on page 135 for a discussion of how such a check exception history is handled.

The exception history process may be performed by two methods:

- **Before the operating system during into operation starting**
- **During the operating system following into operation starting**

See **How to Audit the Exception History** on page 135 for a discussion of the advantages and disadvantages of each method.

Note: Changes made in Exception History are one-time changes that are used only in the current case. Modifying entries in the Exception History screen does not change stack, action, and operations in filling, stack, or Preference code.

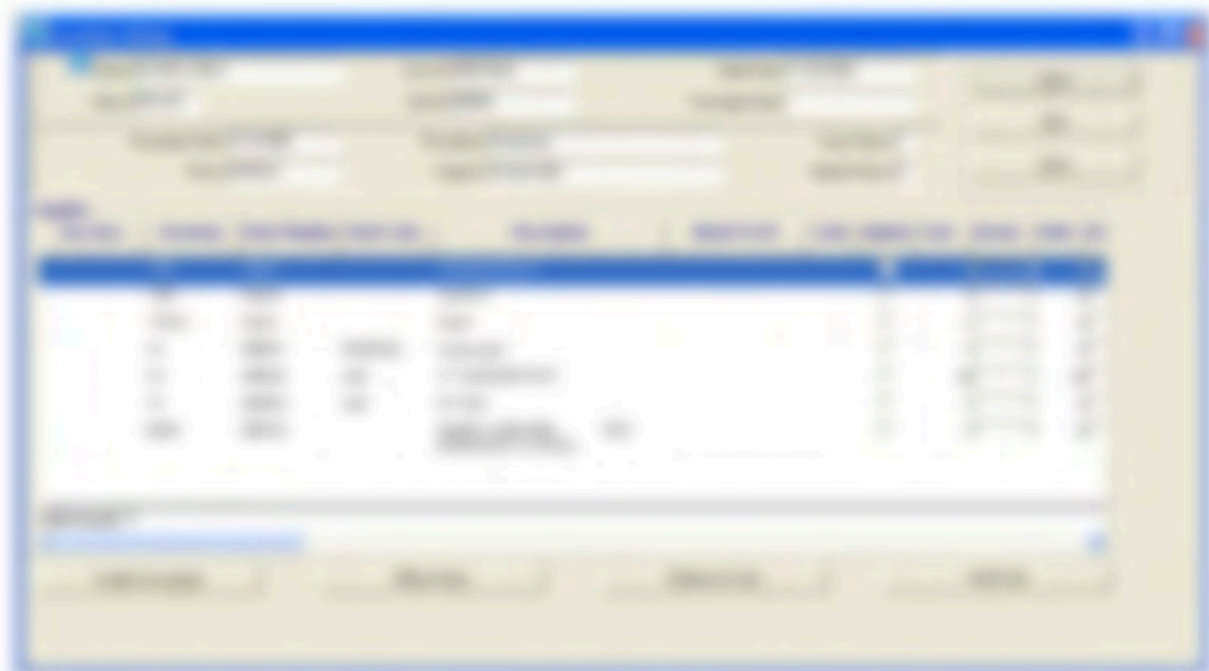
The user screen for Exception History screen is one of three steps:

- **First Step: Filling** in the Case Record screen. This screen can be to do Exception History for stack items. The following image shows the screen in that state, which shows multiple items to be automatically described in the case record by entering the case code in the top corner.

Case Record Screen

Case Record Data Description Entry

- **Case Record Data Description Entry** is a Case Record Screen screen. This screen allows you to create supply items only. This is the recommended method for creating self-performing, nonoperational shipping items. It allows you to supply both one-time and recurring items.



- * This segment is a Case Report section in the Case Report series. Only implementable supplies are shown.

- When you need to add, change, or delete items, prices, or quantities in supply items:
 - Add a new item on page 129
 - Modify a supply item on page 129
 - Delete a supply item on page 129
- When the operation includes an request, you must use Request Entry to record the details of the request, such as serial number, or number, and so forth. See Request on Request on page 129.
- When an additional procedure, requiring an additional preference card, is added during the course of the surgery. See Request a Preference Card on page 129.
- When a late-invoice change is required or procedure requires that the list of supply items be changed to those required on different preference cards. See Request During Surgery on page 129.
- When you need to modify prices or billing comments in the supply item. See Modify a Bill Item on page 129.

The IIF Manager Configuration Guide includes a method for writing errors that produce a set of data for use. Exception History, which has an issue in exception history data that the user affects data. See the documentation in that guide for the Exception History.

Two Methods for Exception History

The exception history process can be performed by two methods:

- Within the operating system during the operation of the
- Outside the operating system following the operation of the

The following is a discussion of the advantages and disadvantages of each method.

Exception History Done in the Operating System

The exception history process is performed in the IIF Manager application on the personal computer in the operating system in the computer as within the operation of the system. The computer would therefore be responsible for the following:

- Tracking all supplies and quantities of supplies used
- Correctly identifying in the system any additional supplies used
- Identifying any additional supplies or supplies used that are not in the system (e.g., materials)
- Identifying which supplies have in the IIF Manager system that should not be changed in the system (e.g., supply combinations)

Another individual after the user is still responsible for the following:

- Tracking the supplies used
- Tracking changes to change which supplies

Advantages

- Some time is saved in process. The computer performs almost everything as well as the exception history, usually saving time in the process as the exception history data can be performed within the user.
- All quantities. Supply quantities are easy to add to the system.
- Finding additional supplies. The user must be made and find supplies in the database, providing the user knows the supply combinations.

Disadvantages

Time commitment is process. Although the system makes it easy to perform exception history it still takes the user additional time to perform the action. It is especially difficult to perform exception history in some cases (BMT, etc., supply when procedures).

- Accuracy. Sometimes accuracy of exception history is at risk when patient care is the primary concern.

Case Record Review

See Case Study for Exception History

- **Difficult to audit.** The case officer or IIR Manager will not be performing a suspension history and management if it is difficult to establish whether it was done properly. If an officer involved will audit the details of a case on the following day, if the case is not audited immediately following the case it is likely that errors or omissions regarding accuracy cannot be corrected.

Exception History in IIR Manager does outside the Operating Room, following the case

The exception history process is done in paper usually on the IIR Manager conference and submitted to the provider as either into operation starting a being done. The flow and documents are delivered to a person responsible for the exception history process. The audit exception history process in the IIR Manager system is done by another individual outside the operating room, usually as part of the initial case building process.

The provider is responsible for the following:

- Building all supplies and quantities of supplies used
- Correctly identifying or paper additional supplies used
- Identify any additional supplies used or paper drug materials
- Identifying which supply items that should not be changed in the patient drug administration

Another individual after the case is still responsible for the following:

- Building the supplies used
- Building supply quantities and entering additional supplies used
- Building changes for change which supplies

Warnings

- **Time commitment.** Supplies used can be indicated quickly on paper. Providers can focus on patient care or short cases rather than performing entire exception history.
- **Building.** The paper case used in exception into the supplies can be quickly audited and patients can be established to determine shortcomings in the process or patient errors in what supplies were indicated or used.
- **The exception history can be done while performing standard case data audit.** The exception history, building, and adding changes change which supplies maintenance items can all be performed as a follow-up activity.

Drawbacks

- **Time to exception code.** It takes a few additional hours average if it takes a day to perform exception history outside of the operating room. However, this can be offset up into the standard day-to-day building process to eliminate the additional time investment.

[illegible][illegible]

It is assumed that the true condition is the operating state and is therefore not an act to perform the exception taking in the operating state. After you set up the state correspondence setting procedure to ensure that the exception taking process is being performed properly.

Case Record and Billing Cycle Diagram



Exception History Screen Type

The following list are offered to help you use Exception History.

- Connect the Case Record Center for information on displaying the Case Record.
Displaying the Case Record is controlled by the parameter **Display**, with its exception history for the Billing Cycle screen type.
- Depending on administrative settings, records are not only added to the Case Record as multiple the record for a single bill, it may be used to be necessary to change individual data available to you to prevent them from going to billing.
- The following are displayed with the exception **NO** in the Exception History and are added to the list of Exception History screen. Manager integrator between them cases of billing that

Case Record Screen

See Case Data Tab: Description History

See Previously Added

Yes is Add Duplicate Item

No is Create Selected Duplicate Item

Clicking **Yes** displays the Description screen with information to assist you in entering the duplicate item.

Clicking **No** displays the existing supplies list with the highlighted entry selected.

Clicking **Cancel** is the case of a duplicate triggered in Case Mode with the focus back on the Item entered in the Description History window. Clicking **Cancel** is the case of a duplicate triggered by a manual entry brings the focus to the Item entered in the Description Supply window to allow a new entry.

A message appears in a pop-up area to alert adding a supply supplies would result in a duplicate entry that matches an existing entry in all of these three forms:

- Inventory
- Stock Number
- Case Mode

The message notifies you that the supply has already been documented in the selected case form. When this message appears, you can click Yes or No.

- **Yes** You can continue adding the item as usual.
- **No** Resets the Case Mode change and returns the value to the original entry.

An item can be entered with a default case form, and if such an item already exists in the case with a different case form, the entered item is considered a duplicate and adding a new entry is denied.

The display of duplicate items in Description History shows **Inventory**, **Stock Number**, and **Description**. This shows the Item ID case forms are defined. Inventory and other case forms showed that display includes **ItemNumber**, which is necessary to distinguish between them because they are stored under the same **Inventory** and **Stock Number**.

Case Mode Concepts

Clicking **Supply Case Mode** stores inventory items to be automatically documented in the case record by entering the case mode in the Item concerned. The case form the user specifies a record whose value is displayed in the opportunity to add to the case either as Item that is in the case of a new item that is not in the case.

Case Mode is also available from the Case Record Inventory screen, and it functions identically to both screens except that in the Case Record Inventory screen, it displays only its requests. The requests of the Description History window will also appear through adding **SupplyHistory** in a case, and the other screen through adding **SupplyHistory** in a Manual Record. Case Mode adds information only to a case record of log. It does not make an entry in a database or table.

Case Record Screen

Get Case Data Tab Description Entry

If the user in the user list is default inventory, that inventory is the first place that the software searches for a match to a selected item. Default inventories for users are defined in the Facility Inventory Mapping Dictionary.

See the Off-Storage Configuration Guide: Inventory Dictionary.

The following information is employed in searching for matches:

Inventory Name	Type of Search
UPIN	UPIN code (U = UPIN 1)
UPIN	UPIN code (U = UPIN 2)
Item Number	Item number
Material Lot Code	Manufacturer coding number
Serial Lot Code	Vendor coding number

Multiple items in the searched inventories will a value matching the entered value are displayed, allowing you to choose one. If the search finds only one matching value, the item with that value is automatically selected. If no match occurs in the search, a message appears stating that the entered item was not found.

The search can be reconfigured by changing a value in the parameter in Inventory Dictionary to test the search is one of the fields shown in the preceding table.

The top code inventory used in user mode operations are all the background-provider type. These inventory codes provide information as though the source was a background. The inventory should be configured to send "XXXXXX" after a code, which allows the user to avoid making the entry.

Scan Mode Operations

When Off-Storage is in Scan Mode, you interact with about 10 responses from time-based systems. The scan Scan Mode appears in the left side of the Description Entry screen and Case Record Update screen.

1. **Scan Mode Scan Mode** is allow inventory items to be automatically documented in the user screen by scanning the top code on the item concerned. Off-Storage is made for scanning after the background code of the Scan screen changes from red to green and the user appears at the Scan list. Double Scan Mode appears. Following **Double Scan Mode** uses Off-Storage from accepting data from a scanned.

Note: Caution: It is the good way combination for starting or ending Scan Mode.

In Scan Mode the master codes of the screen display Scan Mode.

- **Scanning:** If the user in the user list is default inventory, that inventory populates the Scan list if it is not required.

- **Use Mode:** The entry is required if the data value used is a case without data. If case data values do not exist in a case without data, the field is suppressed. The case data is entered in the case record or log that contains the case data.
 - **Units:** The list of characters of a number used against. The unit type character in the list is suppressed for data that is difficult to read.
2. If an error message appears, code **00** in the message window is shown in the window in Study Mode. The error message appears if the system finds only items that are inactive or in inactive overviews, or if no selected case code ID matches the selected ID.
 3. If the system finds multiple items in the database, you are able to select one item. Click on the item to select it. Choosing **00** is pressing the Enter key on the keyboard or using the highlighted item. Choosing **0** in the case right-hand corner of the window closes it without confirmation.
 4. If the system described in the preceding step did not appear because the selected item occurred only once in the case record, the item is selected for edit, and its quantity is shown with a yellow background to indicate that an existing entry is under edit. The background is yellow, white, and highlighting being red for modes depending on the setting of the **Highlight, modify, prompt** parameter. If the parameter has the value 0 the following characteristics apply:
 - The highlighted window gives you the opportunity to add or edit an item that may or may not be in the case, and the **Highlight** or **Highlight** function is allowed. The highlighted window has the inventory and Stock Number tabs that is with the case data. The highlighted window allows editing of an item that is already in the case. The highlighted window shows the quantity of all item that is already in the case. If the item already exists in the case its quantity greater than one, the first instance in the case appears for editing.
 - Inactive items that already exist in the case present the opportunity to select an existing record, add an existing record, or highlight an existing record. Pressing the Enter key or clicking **00** opens an existing record. The window for editing and highlighting an record are defined. The default case record are opened in editing. The **Default case data** is opened in highlighting an record.
- If the **Highlight, modify, prompt** parameter has the value 0 the following characteristics apply:
- In case mode you see a display of the **Highlight** prompt for inoperative items. If the item is already in the case, this allows you to choose to add or edit item entry or add existing item quantity.
 - In manual entry mode, there is no prompt, and you use the window for editing both inoperative and non-inoperative items.
5. Study Mode terminates when you close the Description History window displayed by editing DescriptionHistory in a case, but this is not true for the Case Record inoperative window and the Description History window displayed by editing DescriptionHistory through a master window. Consequently, if either of the set two mentioned windows is open in Study Mode, and you open another window and use the focus on an editable field, each data set under the editable field.

Case Record Screen

See Case Data Tab Description Below

1. Select a **Case** from the Case list in the case record table. If selection is required in the parent system.
2. **Case** may be active. It may be inactive, depending on administrative settings. If you select a case in this table, it is used in filling instructions for the case. If an item is not in compliance with a filling rule that applies to marking, the marking is applied to the active case.
3. **Case** may be inactive, depending on filling rule settings, but you should not change the case except in unusual circumstances.
4. **Case** may be a **Filling Case**. This case will be marked correct even if the item is not an item.

Note: If your filling method supports the Filling Case system, it will fill the case.

5. If the item is an item, and you are using the Fill Manager system, you must use Description Below to record it.
 - If **Marked** is active, the system will fill the active item in the Marked system. This **Marked** is active for the correct Marked item.
 - If **Marked** is not active, you must enter the information manually using **Marked**.
 - **Marked** shows the Marked item. You can select a case that is a Marked item, which will allow you to enter in the Marked. You can select a case for **Marked Description** that is a Marked item. You can use a **Marked Description** to enter the case in either of these fields. You can use the Marked to enter in **Marked** and you can be entered only by manually marking it. If you need to enter a **Marked Description**, use the Marked **Marked** in the Marked **Marked**. See **Marked** in **Marked** in **Marked**.

See Case Data Tab

Stock Item Listing Methods

In addition to listing up a stock item by Stock Number, you can use the following methods also in the description of methods in an associated table in the data you want to search for stock.

Item	Item	Type of Item
1	See Description of Item	See Description
2		Manufacture listing number
3		Vendor code number
4		Item number code
5		Item
6		Item listing number
7		Item listing number

Display. These records will all of the stock items with "yes" as their location, such as "United Kingdom" or "South and Western".

Supply a Stock Item

Depending on administrative settings, amounts and units may appear in the Case Record as multiple this entry for a single item. In such a case it is necessary to change individual item quantities to zero to prevent them from going to filling.

- To change the **Actual Quantity** or **Master Quantity**, highlight the supply item you want to modify, and enter the new **Actual Quantity** or the **Master Quantity**.
The **MR Quantity** equals the **Actual Quantity** minus the **Master Quantity**.
- Highlight **Unit** (as appears) if this is the unit only. Depending on administrative settings, if you get a unit in the field, it is used in filling calculations for the case. If an item is not controlled by a filling rule that applies a mapping, the mapping is applied to the added unit.
- To enter a comment, or to add more information than information, such as number or serial number, double-click on the supply item.
The **Inventory Supply Screen** opens.
- Tap through the **Amount Used** and **Amount Wanted**, changing quantities as desired.
The **Amount to MR** for changes is equal the **Amount Used** minus the **Amount Wanted** and **Amount** zero.

Note: You can change the unit only if the item is not a Patient issue, and the **Change Allowed** box in the associated Filling Procedure Code document entry is checked. There are no comments for replacement.

- If the item is an implant, you must use Description Entry to record it.
If **Implant** is active, the supply item is in the Implant document. Click **Implant** to select the correct implant item.
 - If **Implant** is present but you must enter the information manually using **Master**. You can select an **Implant Type** value from a drop-down menu without affecting its value in the document. You can select a value for **Implant Description** from a drop-down menu. You can use a **Description Comment** field to enter the value of these fields rather than implant type or implant value, and you can reset this value only by a manual operation. If you need to enter a Storage Temperature, use the format 10°F or the format 10°C .
- Click **MR** to save.

See **Amount** on implant on page 155.

See the **MR Storage Configuration Guide: Preferences Case Document**.

Supply a Stock Item

- Enter **Supply** or **Stock Stock Item** or select **Stock Stock Item** in the right-hand menu.
The Stock Item is added.

Create Record Screen

See [Create Data Table Description Table](#)

Note: When items are deleted manually, without a confirmation message, the deletion is not final and you can undo the action, as if you accidentally delete an item, undo the action without saving it.

Using TrapPatches

1. Select **TrapPatches** > **Add TrapPatches** > **Add TrapPatches** from the application menu. Only authorized users can add.

The following TrapPatches screen opens.

2. Select a **TrapPatchID**.
3. Enter **TrapPatchID** quantity, **max/min**, and **source** quantity.

Note: If you are adding a **TrapPatchID** record to **Block**, the **Min/Code** of the **Block** must be displayed on the **Min/Code** of the **TrapPatchID**. The **Block Number** and **Description** appear as required only in the **Block** **Block** screen. An asterisk (*) next to the **Min/Code** must indicate a **TrapPatchID**.

4. Select a **Block** if values exist in the user-defined table. If selection is required in the screen screen.

Note: When a **TrapPatchID** is added to **Block**, the **Block** is assigned the **min/min** of the **TrapPatchID**.

5. **TrapPatchID** may appear. It may be used only, depending on administrative settings. If you are a user in the field, it is used in adding calculations to the user. The user can add to add the user of **Block** in the **TrapPatchID**. **Block** **Block** that apply **TrapPatchID** are effective for the added **TrapPatchID** user in the added code of **Block** in the **TrapPatchID**.

See the **DB Manager Configuration Guide: Performance Test Supporting Environment**.

6. **Block** is available to change **Block** information such as **min/min**. The **Block** to add only are also present.

1. Click **OK** to save.
The description TrapPacKit screen closes.
The software inserts the new entry in the description listing screen.
If the Actual Quantity exceeds 1, it is recorded as individual line items that each have a quantity of one.
2. To add one of the TrapPacKit items you have created, right-click **Modify Stock Item**.
The description TrapPacKit screen opens.

The Edit TrapPacKit Stock Screen

TrapPacKits that are marked with **E** or **BE** in the Inventory column in the Case Report are edited in a special TrapPacKit Stock screen. A TrapPacKit marked as Stock appears with either of the two indicators above names. The stock item can be placed in double-clicking. The screen will be preformatted to appear in the screen to make it effortless.

- **BE** – Set up as **BE** as Stock in the TrapPacKit Database. The user will be asked about double-clicking, but the editing state will change the stock item that is represented in editing.
- **E** – Set up as **BE** as Stock in the TrapPacKit Database.

In the TrapPacKit Stock screen, you can change the following data:

- Actual quantity
- Stocked quantity
- Use unit

Modify a TrapPacKit Stock Item

1. Display the TrapPacKit Stock screen by doing one of the following in the description listing screen:
 - Double-click the record marked with **E** or **BE**.
 - Right-click the record marked with **E** or **BE** and select **Edit TrapPacKit Stock**.
2. To change the **Actual Quantity** or **Stocked Quantity**, highlight the record item you want to modify and enter the new **Actual Quantity** or **Stocked Quantity**.

The first quantity equals the second quantity when the **BE** record quantity.

Note: The **Stock Quantity** comes from the Production Case database, and can be edited in description listing after editing is finished in the **Change to Individual Stock** is selected in the TrapPacKit in the TrapPacKit Database. The modified quantity will be used for editing, but otherwise the modified quantity are added to existing quantity. A change to individual Stock appears in the selected TrapPacKit. The message shows the date of TrapPacKit processing the day of the alternate editing screen. The message shows the date of TrapPacKit entry. TrapPacKit has to use all units. Hence any modification in **Stock** will not be used in editing.

Case Record Screen

See Case Data Tab, Description Field

5. **Updated** is the last time the supply is used. It may be null only, depending on administrative settings. If you set a unit in the field, it will be used in setting calculations for the case. You may be able to set the unit of supply in the **SupplyProfile**. Setting these two supply methods will be effective for the entire **InventorySet** and in the other units of supply in the **InventorySet**.

For more information on the underlying logic, see the following chapter in the **CD Manager Configuration Guide: Performance Case Supporting Information**.

6. To enter a comment, or to add more extensive case information, display the **Extended Supply** screen by one of the following methods:
 - Double-click a **SupplyProfile**.
 - Right-click on a **SupplyProfile** and select **Supply Detail**.
 - Right-click on a **SupplyProfile** and select **Case Detail**.
 - If the **SupplyProfile** is linked to **Stock**, the **Linked Stock** tab appears at the bottom of the screen. Modifying the information does not change the data used in billing.

Note: If you are viewing a **SupplyProfile** linked to **Stock**, the **Alt** code of the linked stock is displayed on the **Alt** Code of the **SupplyProfile**. The **Stock Number** and **Description** appear as null only, and, in the **Billing Details** screen, the column linked with **SKU** indicates that linked **SupplyProfile**.

7. Tap through the **Amount** **UnderAmount** **Weight**, changing quantities as desired.

The **Amount** is set in changes to meet the **Amount** if it meets the **Amount** if you set the **Amount** for supply.

Note: You can change the price only if the unit is **Patient Stock** and the **Charge Estimate** tab in the associated **Billing Procedures** table definition entry is checked. There are no comments for **InventorySet**.

8. **Updated** from the **Use Date** selection.
9. The **More** icon button is available to change detailed information such as **Unit Number**. Tap fields for text entry and data updates.
10. If the field is an input, you must use **Description** field to record it.

If the **Updated** button is active, the supply item is in the input dictionary. Once **Updated** is active the correct input item.

 - If the **Updated** button is grayed out, you must enter the information manually using the **Amount** button. You can select a value for **Updated Type** from a drop-down menu, without affecting the value in the dictionary. You can select a value for **Updated Description** from a drop-down menu. You can type a **Description Comment**, entering a value for either of these fields removes the **Active** status of an input, and that value can be restored only by a manual operation. If you need to enter a **Storage Temperature**, use the format **MM/DD** of the format **MM/DD**. For more information about the fields in the **Extended Supply** screen, extended for reports, see **Case Data Tab, Description Field** on page 100.

Implant Diagram: Charting Implants



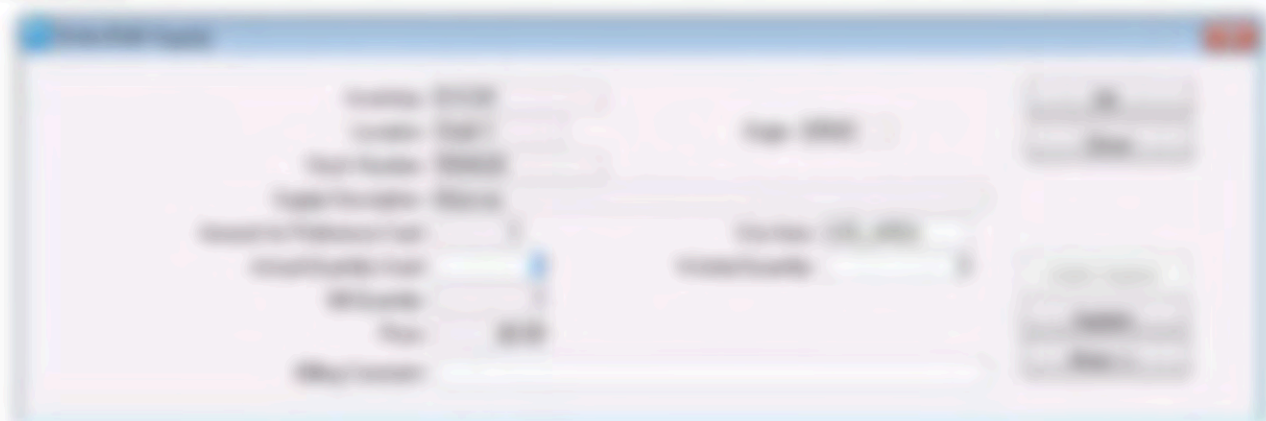
This section describes the two scenarios you may encounter when recording implants:

- When the implant data is in the implant dictionary
- When the implant data is not in the implant dictionary

Note: These steps refer to the SmartRisk Supply screen used in Simulation Testing.

Save to Input Dictionary

When **Input** on the Case/Field Supply screen is active, the Input items are in the Input Dictionary.



1. View Input

The Input Records screen for the selected input appears.

Input Records for Input 1000

Case	Input Number	Input Number	Input Number	Input Number	Input Number	Input Number	Input Number
1	1000	1000	1000	1000	1000	1000	1000
2	1000	1000	1000	1000	1000	1000	1000
3	1000	1000	1000	1000	1000	1000	1000
4	1000	1000	1000	1000	1000	1000	1000
5	1000	1000	1000	1000	1000	1000	1000
6	1000	1000	1000	1000	1000	1000	1000
7	1000	1000	1000	1000	1000	1000	1000
8	1000	1000	1000	1000	1000	1000	1000
9	1000	1000	1000	1000	1000	1000	1000
10	1000	1000	1000	1000	1000	1000	1000

- Click on the case whose record number matches the input that you are using for the procedure. If you have permission to work in the Input Dictionary, **Add Input** appears at the bottom of the Input Records screen. If you do not see the **Add Input** button in the Input Records screen, you can click **Add Input** to open the Basic Input Dictionary where you can create the needed input. After you have added the input in the Basic Input Dictionary and closed its screen, the Input Records screen opens showing the newly created input.

- If you clicked on a row in the Input Records screen as suggested in the previous step, click

OK.

The Extended Supply screen for the implant appears. See [Get out to Implant Dictionary on the CD-ROM](#).

Note: The **Number** and **Calling Number** values are retrieved from the Block Dictionary.

- Enter additional implant information as necessary.
 - Click **OK**.
- The implant information is recorded in the case record.

Get out to Implant Dictionary

It is recommended that all implants should be entered in the Block Implant Dictionary before they are used in a case. The Block Implant Dictionary is described in the *CD Manager Configuration Guide*. If you click **Implant** in the Extended Supply screen and display the Implant Record screen with the action **Get Implant** under the list, you have permission to create a new implant in the Block Implant Dictionary.

You need to enter the information for an implant manually in the extended Extended Supply screen in the following circumstances if you cannot work in the Block Implant Dictionary:

- Implant** in the Extended Supply screen is not active.
- You clicked **Implant** in the Extended Supply screen and did not find the item in the Implant list.
- You did not enter the implant in Block Mode when you clicked **Implant**.

How to implant manually

- Click **Manual** to enter the implant information manually. The Extended Supply screen appears for input of implant data. Note that the **Number** and **Calling Number** values are retrieved from the Block Dictionary. The documentation for the block management system, *TRIS*, gives it in the *CD Manager Configuration Guide*. Because this tool is newer than the Extended Supply screen in the Block Implant Dictionary and not active, the guide also describes the *Trans Preparation* screen which is designed to entering **Preparation**. The *Trans Preparation* screen is where you can enter details concerning articulation and occlusion. The *CD Manager Configuration Guide* describes differences in determining articulation and occlusion at different sites.

The following list of fields in the extended Extended Supply screen includes comments for some fields with special behavior or non-obvious meanings:

- Lot Number:** Number of the lot from which the implant was taken. This data is available in the Block Implant Dictionary and in exception coding, but an edit in exception coding does not automatically flow to the Block Implant Dictionary.
- Serial Number:** Number assigned to identify the particular implant. This data is available in the Block Implant Dictionary and in exception coding, but an edit in exception coding does not automatically flow to the Block Implant Dictionary.

- Manufacturer:** The implant manufacturer may have a value different from the stock manufacturer.
- Model:** Model of the implant.
- Purchase Order Number:** Order number for the implant.
- Site:** The identification of site is related to TMS software as discussed in the IIF Manager Configuration Guide.
- Storage Location:** The field is available for implants and tissue type records.
- Implant Description:** Assigning a value to this is a case record property that being added to the Stock Implant Dictionary, without a manual review of the data. This value is input to the Stock Implant Dictionary. Changing the value of this field creates an assumption that the implant has been used. If the value of the field is changed in exception entry, the implant appears as inactive value in the Implant Dictionary.
- Description Comment:** Assigning a value to this is a case record property that being added to the Stock Implant Dictionary, without a manual review of the data. This value is input to the Stock Implant Dictionary. Changing the value of this field creates an assumption that the implant has been used.
- Storage Temperature:** If you need to enter a Storage Temperature, use the format MM/DD or the format DD/C.
- Lotting Number:** The implant lotting number may have a value different from the manufacturer's lotting number for stock.
- Expiration Date:** Entering an implant manually in exception entry with the value of date results in its representation in the Implant Expiration Report.
- Expiration Date:** Date that implant was expired.
- Buyer:** Person or account responsible for implant purchase.
- IMR:** Iife Medical Record No. You can select this No. is IMR.
- Implant Type:** You can select a value for **Implant Type** from a drop-down menu without affecting its value in the Stock Implant Dictionary. This value indicates whether the implant is tissue, which means tissue field is empty. The status as tissue can be at the Stock Dictionary level, but such an assignment can be changed in exception entry.
- Implant Comment:** Free text comment for the implant.
- Image ID:** Each tissue has a unique identifier, regardless of whether TMS is turned on. TMS deals only with tissue that have unique identifiers to deal its image to tissue.
- Tissue Size:** All dimensions are available. This is input to the Stock Implant Dictionary.
- Tissue Source:** This is a value such as "Donor." This is input to the Stock Implant Dictionary.
- Responsible ID:** The Responsible ID field defaults to the user logged into application, but allows the user to re-make a selection from a drop-down and change the value. The responsible

Case Record Screen

Record as Supply

Approved items must be a valid user in Security Manager. If an invalid user is used on the TMS interface, the value becomes 000000000.

1. **Recorded as DR by:** This field is not visible in the Stock Input/Output Dictionary, but in the supply list in the Stock Input/Output Dictionary, input to exception listing, this indicates the recording of the user field is different. In the Stock Input/Output Dictionary, "Recorded by" indicates the person recording items in the supply system, while in Exception Listing, it indicates the person recording items in the DR table.
2. Enter the input information, then click **OK**.
The system is recorded in the case record and you are returned to the Stock/DR Supply screen.

Supply a Preference Card

1. Click **Preference Card**.
2. Select **Supply**.
3. In the list, select a preference card.
4. Click **OK**.
5. Click **Yes** to supply the preference card.

Inventory Listing Supply

1. Click **Preference Card**.
The Supply a Preference Card screen opens.
2. Select **Stock/DR**.
3. Select a preference card from the drop-down list.
4. Click **OK**.
5. Click **Yes** to select all existing supply items and substitute supply items and quantities from the new preference card.

Exception Listing and Billing

The Exception Listing screen shows the following quantity fields for each supply item:

Order Qty: From the preference card not available. The number of items requested in the card plus the number of items on hand.

Actual Qty: The total number of items actually used and ordered. Cannot be less than **Ordered Qty**.

Stock Qty: From the preference card not available. These items are ordered but held in reserve.

Ordered Qty: The number of items ordered. Cannot be greater than **Actual Qty**.

DR Qty: Not available. Value adjusts automatically according to a system setting. Other supply list items adjust the **Actual Qty**, meaning that used and ordered items are added for a supply **Actual Qty**. **Ordered Qty**, meaning that only used items are added for.

Example

Unit No	Amount No	Unit No	Amount No	Unit No
1	2	3	4	5

Unit No is 10 and Amount No is 10. This means that 10 items were supplied to the user in this procedure. In reality, 10 items were used but 1 item was unused. The user has therefore entered 10 in the Amount No and 11 in the Unit No. As for the 10, the exception setting is for the 10 to report that the 10 items were included in the 10.

Note that the three Quantity fields in the Exception Setting screen correspond to the Amount field in the Unit/Item Supply screen as follows:

Exception Setting screen field	Unit/Item Supply screen field
Amount Quantity	Amount used
Amount Quantity	Amount unused
Unit Quantity	Amount to Unit No

Exception Setting Audit Trail

You can view and print the Exception Setting Audit Trail by clicking the **Audit Trail** button on the Exception Setting screen. This feature has the levels of audit trail:

- High Level** tracks the following basic activity:
 - Add Supplier master changes to supply items
 - How Supplier master users who entered the Exception Setting screen had made no changes
 - Add Preference Card master preference card additions
 - Remove Preference Card master preference card deletions
 - How Supplier master setting of the Case Record Supplier and Billing tab
- Detailed Auditing** is in addition to the high level auditing shown above. Activity tracked by detailed auditing includes the following:
 - Supplier master added when user is added
 - Supplier added when Preference Card is added against supplier
 - Supplier added when Preference Card is removed against supplier
 - Add Stock Item
 - Add Tray/Package
 - Modify Stock Item

Case Record Screen

Edit Case Data Tab: Case Analysis

- [Builds: TopPriority](#)
- [Builds: Build Item](#)
- [Builds: TopPriority](#)
- [New Build Item](#)
- [New Build Image](#)

High-level building for description building is standard. Detailed building is set by a parameter.

How Builds in Buildings and Case Records

If administrators have set permissions for you, you may see the build icon immediately in front of the name for a field in a building or case record.



The icon indicates that the field value was changed and saved using that icon. You can click the build icon icon to see the Field-Level Build Tool screen for the field.

The building field the build icon appears in the upper left-hand corner of the group of fields. The build icon for these fields can indicate any changes and events of the entire field, but it can also appear where the field value that was at the entire time.

You cannot use the Field-Level Build Tool for an external building, and viewing the build icon as an external building function is message building this. The Field-Level Build Tool for a pattern as an external building can be displayed from the Pattern Form, but it displays only the pattern name, and all of the other fields are blank.

If you open the Case Record Pattern form without selecting a case record, the Field-Level Build Tool screen shows only the pattern name, and other fields are blank.

If two users are working with fields in the same form, changes made by one user are not shown by updating the build icon or making the icon visible for the other user until the other user saves the form and returns to it.

Edit Case Data Tab: Case Analysis

The Case screen gives you a breakdown, as well as details, of cases for all supply and case defined sub-supply items used in the targets.

You get to the Case screen by clicking [Case Analysis](#) on the [Edit Case Data](#) tab of the Case Record screen, or by clicking [Case Analysis](#) in the Description Building screen.

The screenshot shows a software interface for recording case data. It is divided into three main sections, each with a table for data entry:

- Case Information:** Contains fields for Case ID, Case Name, Case Type, and Case Status.
- Case History:** Contains a table with columns for Date, Location, and Description.
- Case Details:** Contains a table with columns for Date, Location, and Description.

Below the tables, there is a section labeled "Add Case Data" with a button labeled "Add Case Data".

Editing Costs and Quantities

None of the fields on this screen are editable.

- To change costs, you will have to use the Cost Rates dictionary, non-supply items in the Stock dictionary, supply items.
- To change quantities, use the Description listing screen, which you open from **SupplyListing** on the Other Data Case Record screen.

Field Descriptions

The three sections are Categories, Non-Supply Items, and Supply Items.

- The information in the Categories and Non-Supply Items section comes from the Cost Rates dictionary and refers to non-supply items, such as tools, engines, and equipment like.
- Categories provides tools to cost categories that are assigned to non-supply items in the Cost Rates dictionary.
 - Non-Supply Items lists the costs of individual non-supply items within the Categories.
 - The information under Supply Items comes from the **Item Cost** field in the Stock dictionary.

Case Record Screen

Edit Case Data Tab: Vital Statistics

Case **Wend** is used as a report showing all of the test items for the case.

See the **Off-Storage Configuration Guide: Billing Statements, Inventory Statements**.

Edit Case Data Tab: Vital Statistics

The **Vital Statistics** screen is accessible from the **Wend Case Data** tab. provides a convenient place to record the subject's vital statistics, and automatically graphs them on the screen at the same time.

Two important notes for vital statistics are discussed in the following sections:

- **Wend Vital Statistics**
- **Wend as entry**

Wend Vital Statistics

1. On the **Case Record** screen **Wend Case Data** tab, click the **Vital Statistics**.
The **Vital Statistics** screen appears.
2. Click **Wend**.
A new entry is created. Note that the current date, time, and your login initials, as well as the **Vital Statistics** from the previous entry also reflect. At this point, the graph shows only the selected entry.
3. Edit the fields in the new entry that you want change from the previous readings.
4. Click **Save**.
The entry is saved and the graph is automatically updated to reflect the changes.

Wend as entry

1. Select the entry you want to change by clicking on it in the entry list at the bottom of the screen, or by clicking on its column in the graph.
The entry is highlighted in the list at the bottom of the screen.
2. Double-click on the selected entry or click **Wend**.
The graph displays only the highlighted entry, and the entry is now available for editing.
3. Edit the fields in the entry that you want change.
Note: Not all of all fields at anytime, and restore the original data by clicking **Wend**.
4. Click **Save**.
The entry is saved and the graph is automatically updated to reflect the changes.

Selecting Statistics to View

To add or hide any of the statistics on the graph, select or clear the boxes next to the corresponding tick marks.

Changing Graph Scale

The default graph scale is 5, meaning that you see up to eight tick marks on the graph at one time. To set this interval for displaying statistics to 10 minutes, for example, a setting of 10 shows up to ten tick marks at one time on the graph.

You can change the scale when the graph is in view mode by setting the Scale box in the upper left corner of the screen.

Edit Case Data Tab Check Case Times

The statistics you can view the times in certain time fields in a case record without having to go into each section of the case record.

- The **Flag** and **Flow** values indicate the check times that the authors recorded in the **Flag** and **Flow** fields columns (begin and end).
- The **Time Time** column is the difference in hours and minutes between the **Flag** and **Flow** values.

Notes

- Only single time time fields are visible here. Multiple time fields do not display in the Check Case Times screen.
- Field settings for this screen are set up in the Case Record Field Mapping screen.
- You can get to this screen from **Check Case Times** in the following ways:
 - In the **Edit Case Data** tab.
 - In the **Manage Case Records Results** screen.

Important Note on Midnight Crossing

How ILL Manager handles field pairs in which the start time is later than the end time.

Example 1

Start: 2018-01-01 00:00 Records in parameter: **check_case_record_time**

Case Record Screen

See Case Data Tab: PHQ-9 Form

- Check case record screen** is where you may have the standard case without test grid, and add or edit case record and use it to record the date on which the surgery took place, if any, and add or delete or not answer. ICF Manager generates that the case may not be in the correct date and displays an error message. You will perform one of the following actions:
 - Click **Yes** in the screen displaying the error message, which shows your current status for that date and end time to select.
 - Enter a date in **year** and **month** is greater than the procedure date to indicate that the procedure occurred wrongly.
 - Change the date or end time.
- Check case record screen** not set. ICF Manager shows you when the case record without an error message when the start time is greater than the end time in a test case. However, the entry for the test case in the Case Record Time Point screen has a yellow highlight and the **Test Time** will be 0:00 to indicate that it may be a date entry error.

Reports and other records will generate a redlight warning situation and record the number of these recordings.

Example 1

Step 1:00:00:00:00 Case Record Time Point screen shows a **Test Time** of 0:00 and the day is highlighted. After the screen ends, you click **Yes**, **No**, **Cancel**, **Save**, **Print** or the **Previous** button. If you do it alone, the system generates a redlight warning and records the number as 0:00 times for additional reports, billing information and cost information.

See the Case Data Tab Buttons on page 105.

See Storage Case Records Results Screen on page 110.

See the ICF Manager Configuration Guide Case Record Screenpage.

Edit Case Data Tab: PHQ-9 Form

Overview

ICF Manager includes a complete Performance Review Form for PHQ-9 system that enables users to document PHQ-9 outcomes and the interventions associated with them. Components of the PHQ-9 system include the following:

- The PHQ Subsystem Dictionary, which is populated with entries for all of the PHQ subscores and their supporting interventions.
- A PHQ form, or template, in which you can place the PHQ subscores and interventions that you want to appear on all case records. This PHQ form is always available for recording standard interventions and subscores in case records.
- A standard table for customizing response choices for subscores on PHQ forms in case records.
- An PHQ intervention in the form of standard user-defined fields that can be placed on case record forms.

When a response is entered into a PHQ intervention field on a form, the subscore associated with the intervention and all other interventions for that subscore automatically appear on the standard PHQ form for that case record.

If an subscore is associated with multiple interventions you can select which subscore to apply to your case record.

PHQ Form on Case Records

The case record PHQ form contains subscores and their associated interventions in tables that allow the user to document the interventions initiated during visits, and their resulting outcomes.

These fields have three sources:

- Subscores that appear on every case record. These are the subscores selected in the PHQ Form Builder dictionary.
- Subscores that appear only on certain case records. These subscores are associated with interventions, user-defined fields. By placing an intervention on a user-defined case record form (U-DF), filling it is possible for the associated subscore and all other interventions to appear on the PHQ form. This feature can be activated by entering a value in the intervention field.

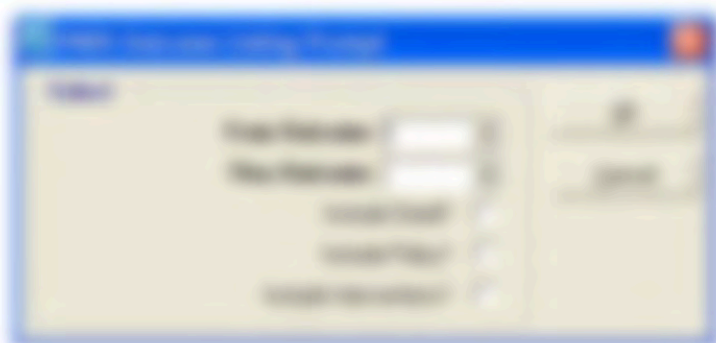
Note: The selections for responses in the table for PHQ Subscores comes from the PHQ, PHQ standard user-defined table. You can use this table in customized responses. See the [U-DF Manager Configuration Guide](#).

Printing Subscores

There are several options for printing PHQ subscores:

Case Record Screen

See Case Data Tab: Case Record Defaults



- Use **Case Number** and **Sub Case Number** to enter the range of numbers to print.
- Select **Case History** to print your institution's history associated with the customer.
- Select **Case Notes** to print the notes associated with the customer.
- The **Case Comments** checkbox is only active if you have selected **Case History**. Select **Case Comments** to include comments with the notes in the report.

Edit Case Data Tab: Case Record Defaults

OF Manager can automatically provide specified case record fields when a case record is started. It does this based on the organization's configuration. Fields are selected by organization's configuration in the Case Record Default screen.

Note: Used Case Record Defaults as soon as you begin a case. If you enter them later, you must automatically overwrite any existing data.

See the OF Manager Configuration Guide: Case Record Defaults

Used Case Record Defaults

1. Open **Used Case Record Defaults** in the **File Case Data** tab.
The Used Case Record Default screen appears.
2. Select a Case Record Default. The default for the organization's configuration is highlighted. You can click **OK**.
The fields in the case record specified by the default automatically fill in, overwriting information already in those fields, including defaults specified in case default screens.

Update MUI Linked Funds

Menu Case Record Options > Update MUI Linked Funds

This is a patient's surgery. Surgery intervention data may be captured in a Surgery module. The data can be linked to DR Storage and displayed in case record case record window.

Surgery data is stored in the interface Database table with surgery table. The data from this table can only be loaded into this case record and cannot be refreshed or removed for the same patient after it has populated the table.

Notes

- This only applies to clients with the Meditech MUI Surgery Documentation module. The feature does not function for clients without the MUI Documentation module.
- This must activate a specific system parameter for the feature to function.

The only way to remove surgery intervention data is through the Unlinked MUI Data feature. This resets the case record table and removes the data.

Note: As a matter of procedure, case record defaults should be updated first and then all surgery documentation completed prior to loading the feature. If surgery data is loaded through this feature and then user Case Record Defaults is loaded, surgery data will be lost.

Update MUI Linked Funds

1. Menu Case Record Options > Update MUI Linked Funds

The MUI Linked Fund update screen opens.

If the parameter is set to 10, this field does not appear on the Case Records Options menu.

Case Record Screen

See the Case Record

Note: If the input fields have not been loaded, the activity, medication, and notes fields are blank. After the input fields have been loaded, the screen displays the case data, time, and user ID for update. The Load Input Fields button will be unavailable after the update.

- Click the Load Input Fields button to load patient records with nursing observation data.

Note: The update process cannot be performed while another update is in progress. Case record updates must be closed to avoid a conflict or audit trail activity.

If the Change Patient button is needed sometime after manually updating the form, the Load Input Fields button cannot refresh a date, time, and user ID after the patient was changed. Nursing data that is generated again for the case patient by clicking the Load Input Fields button the Security Manager screen fields.

Add-On Cases Screen

Menu/Pop - Screen Add-On Cases

Off Manager's Add-On Cases feature allows you to quickly prepare Off Manager for emergency or other non-emergency add-on cases that are not already loaded. You can print patients and worksheets with or without starting a case. You can also use the feature as part of your workflow when bringing a patient back to the OR.

Get Patient

After recommendations that you do not use the feature unless it you have a suspicion of the time of getting back. (The recommendation of changes and updates is discussed in the Off Manager Configuration Guide.)

Note: To add a case for a patient whose name you do not know, you can enter the patient as John or Jane Doe or equivalent then change the name on the case after a Storage Case.

Workflow for Patients brought back to the OR...

Load the Fields

The add-on case can provide a means of handling the situation in which a patient is in good condition records, and then must unexpectedly return to the OR. For example, this is handling the need to surgically retrieve.

For systems integrated with Healthcare Manager specific workflow must be followed to ensure the data is entered in one records rather than redundantly, repeating data in the previous entry. The following steps are necessary within the workflow can be followed:

1. Use IIS folder to create a new encounter type (e.g. "Bring Back to IIS")
2. Use Encounter to create two templates linked to this new encounter type
 - Healthcare_MH
 - PHO_MH

Instructions for creating encounter types and templates can be found in the System Configuration Guide.

Workflow 1 – PHO Manager + Healthcare Manager + IIS folder type + Healthcare Manager

1. Using PHO Manager, transfer the patient out of the PHO.
2. **Using IIS Manager, start an add-on case with the required patient**
3. Offer is in the IIS: using Healthcare Manager select the list of appointments from the screen for add-on a session using the Healthcare_MH template. This will automatically transfer the patient in and into the add-on case.
4. Using Healthcare Manager, at the end of the case transfer the patient out of the IIS.
5. Offer is in the PHO: using PHO Manager, select the patient from the transfer list and start a session using the PHO_MH template.

Workflow 2 – PHO Manager + Healthcare Manager + IIS folder type

1. Using PHO Manager, transfer the patient out of the PHO.
2. Offer is in the IIS: using Healthcare Manager select the patient from the transfer list and start a session using the Healthcare_MH template. This will automatically transfer the patient in and into the add-on case.
3. **Using IIS Manager, start an add-on case with the required patient**
4. Using IIS Administration, link the practitioner created when you started the add-on case to the appointment.
5. Using Healthcare Manager, at the end of the case transfer the patient out of the IIS.
6. Offer is in the PHO: using PHO Manager, select the patient from the transfer list and start a session using the PHO_MH template.

From the IIS

The add-on case can also provide a means of handling the situation in which a patient is brought back to the IIS from the IIS.

For systems integrated with Virtual Case Manager specific workflow must be followed. The steps and workflow are identical to the steps as to bringing the patient back from the PHO, except

Case Record Screen

View the Case Record

For the initial transfer is made from Critical Care Manager and Patient Manager and the Healthcare Manager screens, you do not enter a standard Healthcare screen. The Healthcare MP screen is not needed if Critical Care records and Healthcare records are linked in different encounters, as this normally would be.

Toolbox Buttons

Toolbox buttons are the same as those for standard case records, with the addition of a **My Patient**

button.  and a **Phone** button.  Image of these buttons is described in *Toolbox Buttons and Shortcuts in the Home Page*.

Starting a Case

Enter a New Case

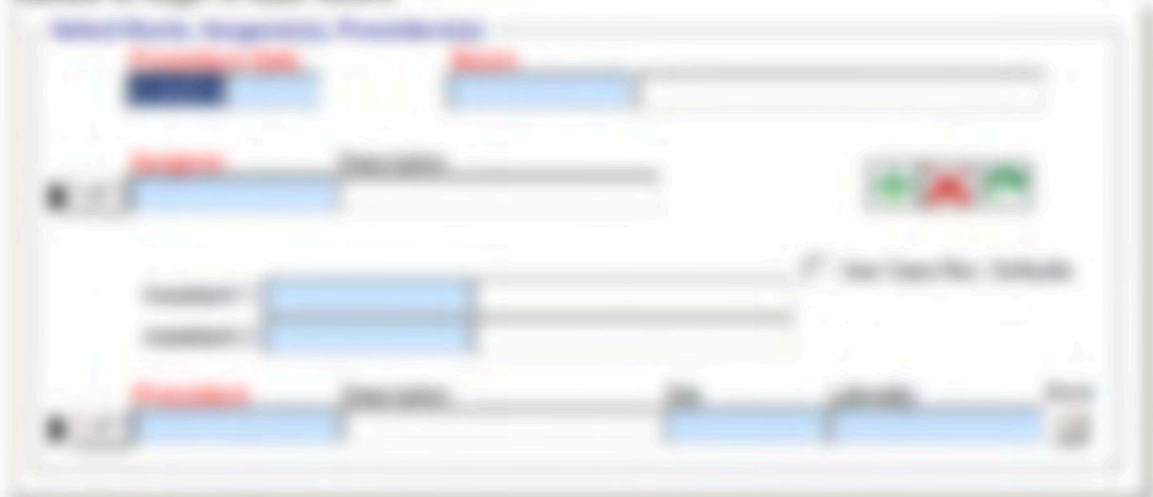
1. Select **File > New Case**.

2. Select a facility.

The Emergency Room for Case screen opens.

3. Enter the patient search criteria in the fields and select a patient in the same way as for a standard case record.

Fields appear beneath the patient data for you to enter the basic organizational information needed to begin a case record.



4. Enter the case data.

- Add or update patients only one subject, but you can add more and delete others by using the corresponding buttons in the right of **Subjects**.
- Select the **Procedure(s)** you are planning to perform for this case.
- Select the **Case File Defaults** if you want to use the defaults for the subject and procedure combination.

You can reset defaults any time within the case record if you decide not to keep them. See **Defaults** for the corresponding data already collected manually.

- Click **Print** to select and print protocols and worksheets. See **Printing Protocols and Worksheets** next.

Get Protocol

This recommends that you print protocols and worksheets for the case when starting a procedure. It is more difficult to print these documents with patient-specific information after the subject starts.



- Click the **Get** button. If you have no patient name, the **Get** button is disabled and a case cannot be created. The case is saved, and the case record is started. The case now syncs with the case record through Storage Cases or Transfer Case Records and the any other case.

Printing Protocols and Worksheets

A major advantage of the Health Case feature is the ability to quickly print protocols and worksheets for emergency and other walk-in cases.

The **Print** button becomes enabled as soon as you have selected a subject or added the **No Patient** button and entered a name, subject and procedure.

How a protocol/worksheets without starting a case



- Follow the procedure for starting an walk-in case, but click the **No Patient** button instead of starting for a patient.
- Follow the next procedure for printing protocols/worksheets.

How a protocol/worksheets from the Health Case screen



- Click the **Print** button. The Emergency Health Case Print screen appears.
- Choose **Protocol** or **Worksheet** and specify **Worksheet** and **File** if necessary. Then click **OK**.

Note: By leaving this blank, all supplies are included.

- Specify inventory.
- Optional: Specify date.
- Select the inventory you want to print profiles for by checking the check boxes to the left of each inventory or checking one of the following:
 - All Regular Inventory
 - All Pharmacy Inventory

Design Profile for Case

Run Date: Run Date To Date Run

Inventory

Inventory	Description	Pharmacy Inventory
☒	Inventory	
☒	Inventory	
☒	Inventory	

All Regular Inventory All Pharmacy Inventory No Regular Inventory No Pharmacy Inventory

Note: Pharmacy inventory is identified as a Pharmacy in the box to the right of the inventory. To print a pharmacy inventory, check the box to the left of the inventory inventory.

- Click OK.
The profile is calculated and saved.

Completing a Case Record

After you've entered all of the appropriate information on the Case Records screens, you can change the status of the case record to Completed.

Note: These recommendations that you implement and monitor an effective auditing process following each case. An effective process is to have the auditor complete the cases, so that only a select group of cases have records to complete and review cases. This helps to prevent users from dropping cases and leaving unaddressed calls.

There are two ways to complete a case record:

- Complete the entire record at one time. This is the standard and most common method. All required fields are checked for values.
- Check each individual section of the case record, and then complete the record. All required fields are checked for values. This is only an option if a supervisor has been set up. This call the check boxes for more information. You may want to use this option if several users are entering case record data because it allows each user to check that each section of data is sufficient. The user completing the entire case record checks if all the sections have been checked. Required fields are checked after each section is checked.

Complete several case records at one time from the Manage Case Records main screen. This option completes a selected set of case records. This option can be used in conjunction with either of the two previous options.

Four things occur when a case record is marked complete:

1. It becomes a case only case. No calls can be made unless the case is changed back to an in-process case.
2. The case record fields listed in your MCRB administrative data are no longer automatically updated by the Maintenance background job.
3. The case is used in calculations for the standard reports and average case lengths.
4. Changes and flags are set in your MCRB system during the next report.
5. All standard reports count completed case records only.

Custom Field Select

Overview

The Custom Field Select feature allows you to search based on standard and user-defined fields, and design relationships between them so you can search on complex combinations of values. The Custom Field Select feature is found in these sections:

- [Manage Buildings](#)
- [Manage User Records](#)
- [Manage Pro-Active Buildings](#)
- [User-Defined Fields](#)
- [SmartPhone Menu Management Trigger Conditions](#)

This chapter contains the following topics:

- [Using Custom Field Select](#)
- [Custom Field Select Operator Guidelines](#)

The following sections explain important Custom Field Select topics:

- [Basic Custom Field Select Conditions](#)
- [Special Custom Field Select Conditions](#)

Using Custom Field Select

Below are the six steps involved in conducting a Custom Field Select:

1. Click **Custom Field Select** on any of the three storage systems where it is available.
The Custom Field Select screen appears.
2. Select a **Field** to search on. For example, if you are searching an HCP code, you select that code as the **Field**, and then click the **OK** button to **Field** to open a Search Diagnostic Code screen.

For multiple fields, multiple codes are added by clicking **ADD**.

Note: The HCP/CPD search screen described above and from the search screen that is displayed from the Procedure Dictionary default is having the **Code** and **Region** with search options enabled when the screen opens.

In **Effective Date** you can enter a date that the custom user is determining the codes to display for your selection. If you enter **Description**, you can enter characters in **Keywords** that configure the code search according to whether you enter codes that describe the characters of the **Region** with the characters. By default, **Code** and **Region** with are selected when the screen is opened. An example in the HCP Storage Configuration Guide discusses the variation between different versions of HCP codes.

3. Select which codes to search for multiple fields only.
4. Enter an **Operator**. This determines the relationship between the field and the value you are searching for.
5. Enter the value you are searching for.
6. Click **OK**.
You are returned to the storage screen.
7. Click the **Refresh/Exit** button.



Settings that meet the selected Custom Field Select and any other criteria are listed.

Custom Field Select Detailed Explanations

See [Custom Field Select](#) on the previous page for the an overview of conducting a basic Custom Field Select. Explanations of each step follow, including details about the Custom Field Select screen.

Selecting a Field

The **Field** step shows users both the fields you can search on (the Storage Building screen lists building fields, the Storage Case Record screen lists case record fields, etc.).

The table explains some of the fields on the Custom Field Select screen whose meanings may not be readily apparent.

Field	Description
Type	Tells you whether the field is Standard or Custom. 0 - Standard 1 - Custom user defined
Multiple	Indicates if the field is multi-valued
Units	Shows you what dimensions or units, if any, the field uses in

Which (line)

The **Which** step shows users, which applies only to multi-valued fields, where you to specify which line to search on.

Which	Type of Search
Any	Multi-valued fields in which any one of the lines match the value for which you are searching
Name	The name line on a multi-valued field that you are searching is the entry shown in Name > Name for Which

Note: The **Which** screen cannot be used for Custom user defined fields.

Operators

The **Operator** defines the relationship between the selected field and a value, such as **Equal**, **Greater Than**, or **Less Than**. In the example in [Using Custom Field Select to Filter Data](#), we use the **Not Equal** operator to filter the **Current Release** field with values that **Equal** **Production**.

Operator Examples

Operator	Description
Contains	Use when searching for a part of a string. You are setting up strings to find values for this field with strings that contain these substrings. The example is search of a name field for values containing "Mac" turns up all names with that value from Macintosh , Macintosh , etc.
Equal	Use to find an exact match for a field.
Less Than	Use to find fields that are less than.
Less Than or Equal To	Search when searching for numbers, dates, and times. For example, Greater Than or Equal to January 01, 000 means 01 or after this date.
Greater Than	Search when searching for numbers, dates, and times. Greater Than or Less Than or Equal To January 01, 000 means 01 or after this date.
Is This Not	Use to create an OR condition string, a list of values for which you are searching. Use the Not operator. It is opposite to Contains . For example, if you are searching the Project field for Project A , Project B , and Project C , use the Is This Not operator and enter Project A , Project B , and Project C in the value field. The system searches all the Project fields with values different from Project A , Project B , or Project C .
Less Than or Equal To	Search when searching for numbers, dates, and times. For example, less than or equal to January 01, 000 means 01 or before this date.
Is	Use the Is operator with the parent tag. It is similar to Contains . Below are examples of Is searches: Search for strings beginning with "cat" such as Catapult and Catapult Research . Search for strings ending with "ing" such as Customizing and Customizing . Search for strings with "at" within them, such as Project and Project .
Less Than	Search when searching for numbers, dates, and times. Less Than or Greater Than or Equal to January 01, 000 means 01 or before this date.

Custom Field Select

Custom Field Select Storage Buckets Explanation

Parameter	Description
Not Found	Indicates when nothing is included in a storage bucket from your search. For example, in all of the storage buckets in a company other than the storage bucket your team uses for test engineering you have code, while the bucket in your operations and code is empty at your table.
Empty Not Found	Indicates that there are no data in the bucket. These buckets are not listed in the table unless they are empty.
Not Found	Indicates that there are no data in the bucket and there are no data in the bucket.
Not in the List	Indicates that there are no data in the bucket and there are no data in the bucket. For example, if you are searching the Storage Field for values other than Storage Field names and folders, use the Not in the List operator and enter <code>NOT IN THE LIST</code> in the Storage Field. The system searches all the Storage Fields in the table and returns other than the field in a bucket in a folder.
Not in the List	Indicates that there are no data in the bucket and there are no data in the bucket. For example, if you are searching the Storage Field for values other than Storage Field names and folders, use the Not in the List operator and enter <code>NOT IN THE LIST</code> in the Storage Field. The system searches all the Storage Fields in the table and returns other than the field in a bucket in a folder.
Not in the List	Indicates that there are no data in the bucket and there are no data in the bucket. For example, if you are searching the Storage Field for values other than Storage Field names and folders, use the Not in the List operator and enter <code>NOT IN THE LIST</code> in the Storage Field. The system searches all the Storage Fields in the table and returns other than the field in a bucket in a folder.
Not in the List	Indicates that there are no data in the bucket and there are no data in the bucket. For example, if you are searching the Storage Field for values other than Storage Field names and folders, use the Not in the List operator and enter <code>NOT IN THE LIST</code> in the Storage Field. The system searches all the Storage Fields in the table and returns other than the field in a bucket in a folder.

Multiple Field Searches

You can perform a Custom Field Select on multiple fields. When searching in a table that has two fields, all of the values from the table are searched for the bucket in a bucket in the Storage Buckets section unless you specify an additional search condition.

If you search the Storage Field for the values Storage Field April 25, 2015 and search the Storage Field for the values Storage Field April 25, 2015, you will see all your Storage Buckets section of buckets included in the table since April 25, 2015.

Custom Field Search

Custom Field Search Detailed Explanation

Relationships

You can declare complex relationships involving a Custom Field Search.

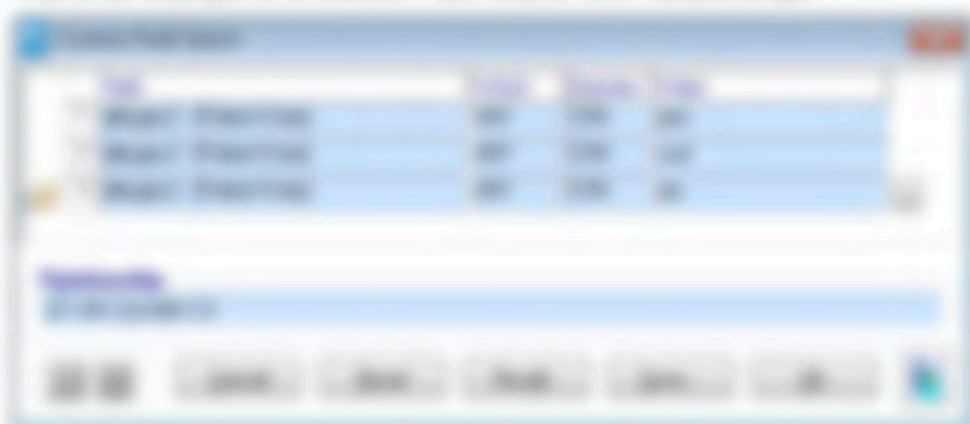
You might want to bring up findings associated by the **Source** and findings associated by the **Target Relationship** in the context of the Custom Search Field window. Allow you to conduct searching on complex combinations of field values.

Declaring Relationships

When conducting complex Custom Field searches, you enter your search criteria that is **Relationships** in the bottom of the window. Declare the relationships. There are two basic kinds of relationships: **And** and **Or**.

- **And**: Both conditions surrounding the **And** must be true in order for the record to be selected.
- **Or**: If either condition surrounding the **Or** is true, or both items surrounding the operator are true, then the record is selected.

Here is an example of a Custom Field Search with Relationships.



Relationship Formulas

The following expressions can be used in for the **Relationship**: **1**, **And**, **Or**, **Not**, **Eq**, **Neq**, **Gt**, **Geq**, **Leq**, **Is**, **IsNot**, **Contains**, **DoesNotContain**.

The following are examples of valid expressions:

- **1** AND **2** OR **3**
- **1** AND **2**
- **1** OR **2** OR **3**
- **1** AND **2** AND **3**

Saving Custom Field Select Conditions

You can save your Custom Field Select Conditions so that you can quickly reuse the search criteria when you want to repeat the search. It is especially useful to save complex searches involving Relationships.

You can save the Custom Field Select Conditions so that your search brings up results unrelated to or overlapping with results in other Custom Field Select screens. After the search conditions are saved, you can quickly repeat the search without searching the data.

Save Custom Field Select Conditions

1. Click **Save** on the Custom Field Select screen.
The Custom Field Select Conditions screen appears.
2. Enter a **Shortname** and **Description**. Then click **Save** to save your Custom Field Select Conditions.
Your Custom Field Select Conditions are saved.

Recall Custom Field Select Conditions

1. Click **Recall** on the Custom Field Select screen.
The Custom Field Select Conditions screen opens.
2. Click **Recall**.
The Custom Field Select screen appears with your recalled conditions entered.

Managing Case Records

Overview

This chapter discusses the tools for managing case records.

- Manage Case Records
- Manage Case Records: Results Screen
- Case Records Audit Table
- Manage Case Records: Defaults: Overview
- Manage Case Records: Defaults: Screen
- Manage Case Records: Defaults: Settings Screen
- Manage Case Records: Defaults: Identification Data Screen
- Manage Case Records: Defaults: Case Data Screen
- Using Workflows and Case Records

Manage Case Records

Menu Paths to Manage Case Records

You use the Manage Case Records feature to search for, select, and modify single or multiple cases and to print audit trails and reports on case records.

Using Manage Screens

Manage Case Records works for the Manage Settings and Manage Predefined Settings in that it uses the screens you use for doing the record search and the other for displaying and manipulating the search results. If you are not familiar with manage screens, see *Manage Screen Descriptions*, page 15.

Search for Case Records

1. Select Tools > Manage Case Records

The Manage Case Records - Selection screen opens.

2. Enter your search criteria

Your selections appear under Selected Items.

3. If you are using Custom Fields, click Custom Field Select to display a Custom Field Select screen and enter your custom field information.

This information can include an **SQL** code. To specify an **SQL** code, you select it as the field type, and then enter the **SQL** code in **Value** to open the Select Program Custom screen. In that screen, you then select **SQL** as the code or value for **Effective Date** and the system will use it to determine the codes to display.

4. Click the **Refresh/OK** button.



The Manage Case Records Results screen appears, showing the cases that meet your criteria.

Manage Case Records Results Screen

The Manage Case Records Results screen displays the records that meet your search criteria and has a number of buttons that you can use to work with these records.

Reconfigure the Results Screen Columns

Follow the steps below to reconfigure the display of the returned findings.

Note: The Case Record is displayed as the last search result column as long as there are no job posting settings configured. In that scenario, the existing settings are displayed and additional changes must be made manually.

1. Click the configuration icon.



The Status column is always visible.

2. Click to select the **Available** columns on the left and click the arrow to move them to the **Selected** column on the right.

Note: At least one search result column must be displayed at all times within Manage Case Records. If existing settings disappear if at least one display field is not selected.

3. Click **Save** to save the configuration.

Note: Configuration settings are stored and used per workstation.

Screen Abbreviations

- The first column, just to the left of the patient name, may contain an asterisk (*) to indicate a complete case.
- The Status column uses several abbreviations:
 - **I** The record is incomplete.
 - **C** The record is complete.
 - **U** The record is unsigned.
 - **S** The record is signed.

Managing Case Records

Manage Case Records Module Screen

Manage Case Records Toolbar



Manage Case Records Toolbar

Icon	Description
	Opens the Edit Case Data tab in the Case Record screen to allow editing of the highlighted case record. Edit Case Data. Tab on page 100.
	Opens the Patient tab in the Case Record screen to allow editing of case record patient data. Patient Data. Patient Data Fields on page 100.
	Allows you to do the following: Change patient in the selected case record. Change an account or unit number in a case that does not have one. Change Patient on page 100.
	Refresh Case Data. Tab. Refresh Case Data on page 100.
	Allows you to select a previous case for the patient and create a new case by automatically copying the patient unit and account number and add the information from the first case affecting into the new case rather than having to reenter the information. Save Case on page 100.
	Changes the case record status to Complete. Completing a Case Record on page 100.

Managing Case Records

Manage Case Records Records Screen

Buttons	Description
 Delete	Permanently deletes the highlighted case record.
 Print Case	Prints the case record in case of two formats.
 Rollback	Reverts you to electronically sign off on calls you made in the case record.
 Call Log	Shows a list of all the calls who have sign the case and whether or not they have been up.
 Public	Highlights case record fields that is Public Information.
 External Report	Click to print an External Report. For more information, see the following chapter in the CRM Manager Configuration Guide: External Reports.
 Audit	Shows all changes made to fields within the case record. For more information, see the following chapter in the CRM Manager Configuration Guide: Audit.

Managing Case Records

Storage Case Records Results Screen

Buttons	Description
 Home	Shows activity at the case record header and section level. Home Section: Built Tool on page 220
 Filter	Provides the Filter History screen from the case record
 Refresh	Updates the case record display from the database to show the most current information
 Print	Opens the Storage Case Records Results screen

Best Practice: If your site uses electronic signature technology, staff should use Storage Case Records to create any original case records to that site system.

Multi-facility sites

At multi-facility sites, depending on the configuration you may be connected with an email information system such as the following when opening a case record:

The screenshot shows a software window titled "Manage Case Records". It contains two tables. The first table, "Case Involvement", has columns: Case, Role, Case Number, Case Number, and Status. It lists three rows: "Case 1", "Case 2", and "Case 3". The second table, "Case Disposition Table", has columns: Case, Role, Case Number, Case Number, and Status. It lists one row: "Case 1". At the bottom of the window are "OK" and "Cancel" buttons.

Case	Role	Case Number	Case Number	Status
Case 1	Case 1	Case 1	Case 1	Case 1
Case 2	Case 2	Case 2	Case 2	Case 2
Case 3	Case 3	Case 3	Case 3	Case 3

Case	Role	Case Number	Case Number	Status
Case 1	Case 1	Case 1	Case 1	Case 1

This can happen if your hospital has changed the database configuration of one or more hospitals in your system or if the case record was not properly updated to the case record system. For example, the case record may include an item of equipment that is no longer available in the facility.

Case Role is used to enter the case information and continue working with the case record. If you enter the case record you will be shown the case role again and it will include in the system. Click the status in the case record and change the disposition information for the case record before saving again or click **Discontinue** to stop the case record with the case record.

Change Patient

Change Patient is used to change the patient information (name, account number, phone, etc.) associated with a case record from one patient to another who has a record in the CM Manager or CM Manager.

The most common use of this feature is to allow the transfer of a case record originally created by an administrator or other user patient whose case record was deleted under their ID. When the patient's name is changed, the ID will be updated through normal processing, then the case record will be transferred to the correct patient.

Note: This can change a patient only to another with an account number that you will update. The system change a patient to a patient with no account number.

This feature is also used when an incorrect account number was selected and you need to transfer the patient information to the right patient.

Managing Case Records

Manage Case Records Results Screen

Note: Changing patients in an integrated system creates changes in linked patient records in other Epic Applications and linked case records such as Physio Manager, Ambulatory Manager, Peds Manager, and Critical Care Manager.

In a Case Management Information system, if a finding and case are linked and have the same patient ID#, a change patient action that updates a different patient for the case results in a message. The message requests confirmation of the patient as the creation of an additional case for the selected patient. The change is not executed and linking off in the message displays the patient search screen with the most recent results.

Change Patient

In the following procedure, the initial patient on the case is referred to as the old patient. The replacement patient is referred to as the new patient.

1. On the Manage Case Records results screen, click the **Change Patient** button.



The Change Patient is a case screen option. The screen screen is similar to that shown when starting a case record.

(The **Results View** button is only available in standalone "administrative medical" systems and for patients from the EM Manager case record system.)

2. Using standard search procedures, search the EM Manager case record system or HIE system for the patient you want to transfer the case record to.

The patient records that meet the criteria are specified appear at the bottom of the screen.

3. Select the patient you want to transfer the case to.

The results screen change screen appears, showing both old and new patient data for verification.

New Patient Group

Name:

Number:

Date:

Time:

Description:

☐ I want to keep all the data in the system and not delete it

☐ I want to keep all the data in the system and delete it

- a. Select one of the two options in the lower part of the screen. The text in the screen describes the consequences of each option.
 - Patients are the **10000**: the old and new patient changes and interactions are combined
 - Patients are **1000000000**: only the new patient's changes and interactions are used
- b. Click **Change Patient**.

See Patient Data Search Results on page 100

Case Record Audit Trails

The Manage Case Records Results screen gives you two audit trail options:

- Patient Audit Trail

Managing Case Records

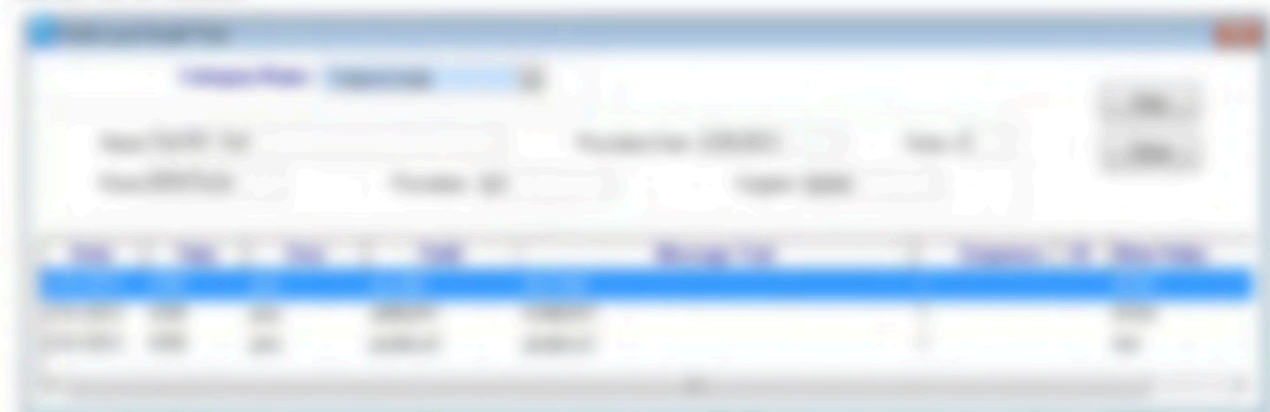
Case Record Audit Trail

- Master Record Audit Trail

Field-Level Audit Trail

The Field-Level Audit Trail screen, accessible from the **Field-Level Audit Trail** button on the Storage Case Records Results screen, lists changes to any data field in the case record database since the record was created.

This list includes the original value, new values, who made the changes, and when the changes were made. The Field-Level Audit Trail tracks changes in the value of the field that specifies the value for a record.



In addition, right-clicking on a field in a column on the Field-Level Audit Trail screen brings up a menu:

- **Select Filter...** is used only within a column containing the same data as the field you clicked on.
- **Unselect Filter** takes off all filters and displays audit trails for all fields in the case record.

Filtering a selection in Catalogs Results affects a field category to reflect the list of changes that are displayed. When the Field-Level Audit Trail screen is opened for one field by right-clicking on the audit trail associated with the field, you cannot make a selection in **Catalogs Results**.

You can print the Field-Level Audit Trail by clicking **Print**.

Note: You can also display the screen through the Field-Level Audit Trail button on the Case Record screen, or by clicking **Print** on the audit trail associated with the case record field.

A limitation exists in the information shown by the Case Record Field-Level Audit Trail. Special characters that are used to define the currency format of a case-defined field are not displayed in the Field-Level Audit Trail. Examples of special characters that are not included in the Field-Level Audit Trail appear inside quotation marks below.

-
-
-
-
-

When these characters are part of a user-defined field's system format as defined in the system format, they do not display in the Field-Level Audit Trail. For example, if a user-defined field is formatted with a format that is a separator, the data appears in the form as "00100" and appears in the Field-Level Audit Trail as "00100".

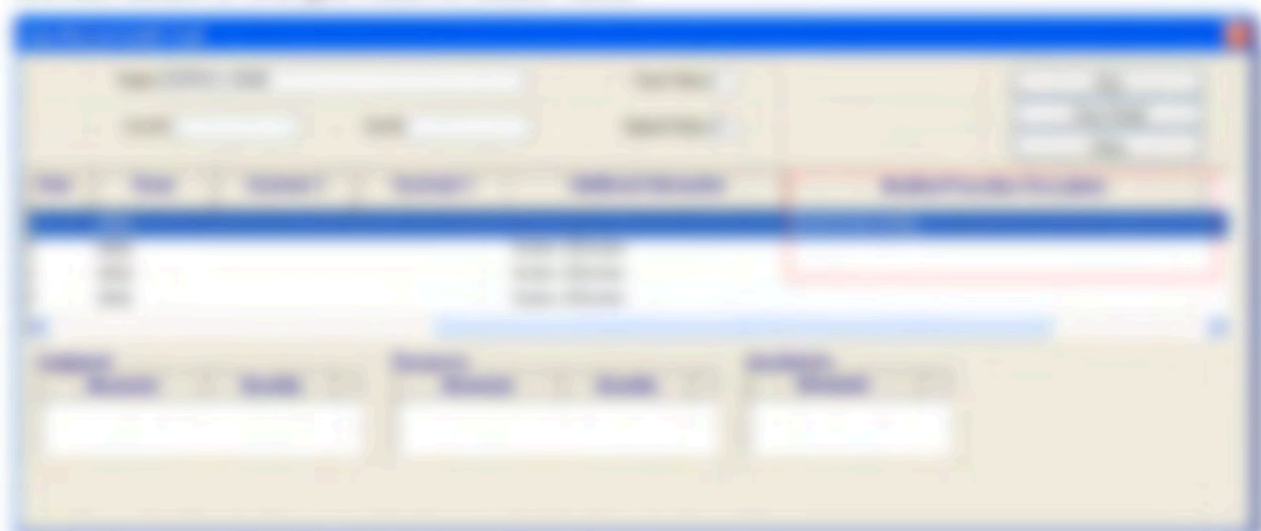
Changes to system data made by a schedule are shown in the field-level audit trail with an attribution to the schedule.

If a system has an alias, and another field is alias under system, they are sorted in the system. This sorting is reflected in the field-level audit trail as a change by the CR Manager application, 0000, 0000.

Header/Section Audit Trail

The Header/Section Audit Trail screen, accessible from the **Show Audit Trail** button on the Storage Case Records Results screen, shows any activity in the header or any section of the case record. This includes creating, editing, printing, deleting, and re-creating.

In addition, when you highlight a header section, you can click **Show Detail** to expand the screen and see details of changes made to header fields.



Click **Show Detail** to collapse the screen to its original size.

Managing Case Records

Case Record Build Tool

Building Primary Procedure Description Building

When you click on the right-hand side of the grid that displays actions performed on headers and records, the **Building Procedure Description** window appears (see).

The **Building Procedure Description** window displays the procedure name if changes have been made to the procedure description. To add a modified procedure description, you select the row that includes the change and click **View Detail**. The window appears to show details, and you click the details at the right-hand side of the **Building Procedure Description** to display the description.

The description appears in the **Building Procedure Description: View Detail** window. Clicking **OK** in the **Building Procedure Description: View Detail** window is similar to clicking **OK** in the **Building Procedure Description: View Detail** window. It saves the modified description as described in *Creating, Deleting, and Archiving Building Procedure Descriptions* (see).

Building Secondary Procedure Description Building

Secondary procedures are added under **Procedures** in the expanded window shown by clicking **View Detail**. A change description to a procedure description is indicated by an arrow at the right-hand side of the **Procedures** window. For a primary procedure, if the length of the description is less than 40 characters, an arrow does not appear. Clicking the arrow changes the procedure description to the selected procedure, as shown in the following graphic. Clicking **OK** in the **Building Procedure Description: View Detail** window opens another window that shows you to add, save, or cancel the modified description, as described in *Creating, Deleting, and Archiving Building Procedure Descriptions* (see).

Creating, Deleting, and Archiving Building Procedure Descriptions

Click **OK** in the **Building Procedure Description: View Detail** window to display modified procedure descriptions as described in the preceding sections. Click **OK** in the window displays the Storage Case Records window shown in the following graphic. The Storage Case Records window shows you to add, save, or cancel the modified description by selecting options at the top of the window.

How the Storage Case Records Window

Click **View Build Tool** and the following details display in the build tool:

- Action: **Build** (see)
- User: **user** (see)
- Action: **OK**
- Action: **Cancel**
- Filter:
- Procedure:
- Save

Note: The first entry of all the sections listed with using **Flow ID** have the same hierarchy as the **Flow ID** that is the audit trail. Additionally, the user only has access to those 7 out of 8 sections. The **Flow ID** section appears in the audit trail for user activity is along with the 7 other sections.

New Feature Summary

When a user views the Salesforce Manage Feature Summary from within a case record in CRM Storage, the defaults appear in the audit trail as **Flow ID**.

Case Record Upfront Audit Trail

When a case record is automatically generated, an entry appears in the audit trail indicating the generating the record. The entry consists of the path **CRM > CRM Case** followed by a the user identifier **Flow ID**, **Flow ID**.

See the CRM Storage Configuration Guide: Case Record Defaults

Manage Case Record Defaults Overview

Managing case record defaults involves working in two screens:

- A storage screen, where you enter search criteria.
- A storage options screen, where you select case record defaults from the list returned by the search.

Storage Processing Flow

1. Enter search criteria, such as case record defaults category, procedures, etc., on the Case Record Default screen.
2. Click the **Retrieve/Find** button to search for case record defaults meeting your criteria. The Case Record Defaults Options screen appears with a list of defaults meeting your criteria.
3. Optional: Change the configuration of the display.
4. Select the case record defaults you want to work with from the Case Record Defaults Options screen.
5. Click the corresponding button at the bottom of the screen to add defaults, add or replace multiple defaults, view defaults, etc.

Managing Case Records

Manage Case Record Defaults Options Screen

Select Categories

Select Categories allows you to select Procedures within Procedure Categories.

After you click **Select Categories**, a list of the Procedure Categories opens.

Select the Procedure Categories that contain the procedures you want to use by clicking the cell values. Then click **Select**.

The Procedure Categories selection screen closes, and the Manage Case Record Defaults screen opens. All of the procedures in the Procedure Categories you checked are now selected.

Search Defaults to Find

1. Search for the Case Record Defaults you want from the Manage Case Record Default screen by entering your search criteria in the search provider.
2. Click the **Refresh/Find** button.



The Case Record Default Options screen appears with the list of case record defaults that meet your search criteria.

See *Managing Defaults* on page 226.

See *Manage Case Record Defaults Options Screen* on page 227.

Manage Case Record Defaults Options Screen

After you select the case record defaults to edit, a screen opens with your selections listed.

Button Descriptions

Select the case record defaults you want to update. Then click the appropriate button.

Managing Case Records

Manage Case Record Defaults: Add/Replace Data Screen

Case Record Default Screen

Action	Description
 Reassign/Edit Default	Opens the Case Record Default screen in the editor for the highlighted user. For more information on the preceding topic, see the following chapter in the OTC Manager Configuration Guide: Case Record Defaults.
 Reset Default	Resets all highlighted or selected case record defaults on this screen. This option should be limited to selected users through security.
 Add/Replace Data	User is add new defaults to selected records and is modify data in the list of fields selected in the Select Fields to be Changed screen of the Manage Case Record Default Options screen. See Manage Case Record Defaults: Add/Replace Data Screen below.
 Clear Data	User is clear data from the list of fields selected in the Select Fields to be Changed screen of the Manage Case Record Default Options screen and is add new fields in the list to be added. See Manage Case Record Defaults: Clear Data Screen on page 222.
 Flags	Opens the Manage Case Record Default screen.

Manage Case Record Defaults: Add/Replace Data Screen

You can access the Case Record Default - Add/Replace Data screen by clicking **Add/Replace Data** on the Manage Case Record Default Options screen. The screen opens with a list of the fields that are selected in the Select Fields to be Changed screen. Important fields added in this screen are discussed in the following sections:

- Add Default Fields
- Modify Default Fields
- Remove Default Fields

Managing Case Records

Manage Case Record Defaults: [Add/Remove Case Record](#)

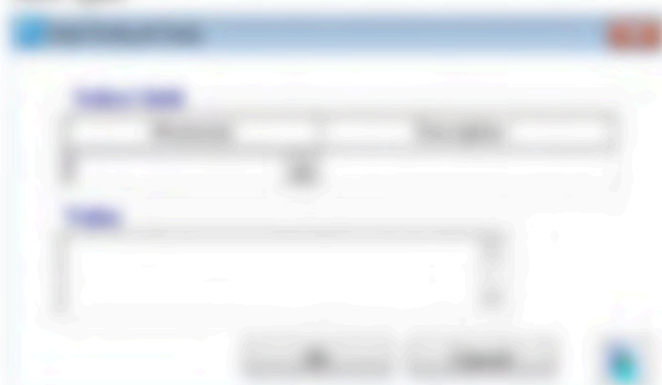
Button Table

This table explains the buttons in this screen.

Buttons	Description
Add	Click to add a new field to the list. See Add Default Fields screen.
Modify	Click to edit the highlighted field. See Modify Default Fields on the Fields page.
Remove	Click to remove the highlighted field from the list.
Process	Click to apply the changes you have made to the selected records. See Process Default Fields on the Fields page.
Close	Click to close the screen and return to the Case Record Default Options screen.

Add Default Fields

- Click **Add** on the [Add/Remove Case Record](#) screen.
This screen appears to enable you to add fields to the list and to fill in the default data of the new field.
- For **Fields**, select a field.
The field name and description appear, and the value for changes is accommodated the field type.



Note: The list of fields you can select from includes only the case default fields which are available in the Case Record Form.

Managing Case Records

Manage Case Record Defaults: Clear Data Screen

1. Enter the default for **Notes** and click **OK**.

The new default data screen disappears and the data you entered is displayed in the Storage column of the **Multi-Response Data** screen.

Modify Default Fields

1. Click **Modify** on the **Multi-Response Data** screen.
This screen enables you to modify the default data in the field.
2. Enter the default for **Notes** and click **OK**.

The **Modify Default Data** screen closes and the data you entered is displayed in the Storage column of the **Multi-Response Data** screen.

Process Default Fields

When all of the fields you want to be edited (changed, etc.) are done, it is time to apply the changes to the fields in the selected default records.

1. Click **Process (Save Default Changes)** to have the system save before each change and ask you if you want to apply each change to that particular default record.
2. Click **Process** to apply the changes to the selected default records.

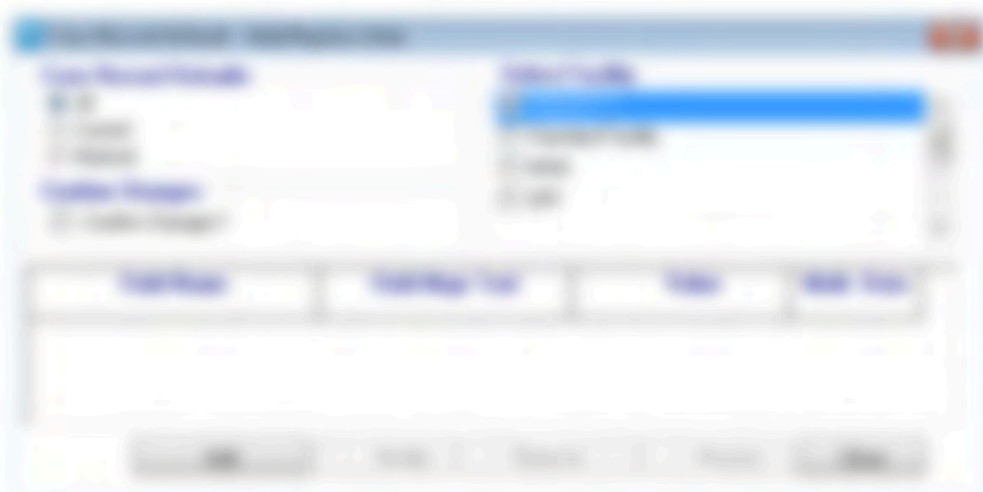
Note: Any changes applied to fields that are not on a particular default record will be lost. For example, if you have two records and a particular default field is on the first three of the records but not the other two, only the first three records are affected. If at some later time the field is added to the other two records, it will not have a default value for those records.

Manage Case Record Defaults: Clear Data Screen

You can remove the Case Record Default - Clear Data screen by clicking **Clear Data** on the **Manage Case Record Defaults: Options** screen. The screen opens with a list of the fields that you selected in the **Default Fields to be Changed** screen.

Managing Case Records

Manage Case Record Defaults > Case Data Screen



This is a list of fields from which you want the data to be obtained for the selected default records.

Button Table

This table explains the buttons in this screen.

Buttons	Description
Add	This is add a new field to the list of fields to display. See Add a Field to the Default Table .
Remove	This is remove the highlighted field from the list.
Apply	This is apply the changes you have made to the selected records. This works the same way as the Apply button on the Manage Case Record Defaults screen. See Manage Case Record Defaults on the previous page.
Cancel	This is close the screen and return to the Manage Case Record Defaults screen.

Add a Field to the Default

1. Click **Add** on the Case Data screen.
This screen appears to enable you to add fields to the list to be obtained.
2. In the **Field Name** box, select a field.
The field name and description appear.

Note: The list of fields you can select from includes only the case-related fields which are available in the Case Record Table.

2. Click OK.

The Case Detail Case screen disappears, and the field is added to the list on the Case Data screen.

Purge Bookings and Case Records

Menu Paths to Purge

The Purge screen gives you a flexible way to delete old records from your IIS Manager database.



Purge Types

There are three main types of purges that can be performed individually or simultaneously:

Managing Case Records

Page Bookings and Case Records

1. **Booking Pages:** Pages (bookings created before the app is used in the Booking State) that prompt the user and use the app prompts that a booking is further after your booking page.
 - **Include Bookings used to create a Case:** Pages (bookings used to case records)
 - **Enhanced Patients the Associated Booking:** Pages (pages from the ICD Manager Booking database if the patient records are after that Booking date and have no bookings associated with them)
 2. **Full Case Record Pages:** Pages of case records created before the Full Case Records State that date, along with their associated data, including indicators.
 - **Enhanced Patients the Associated Case:** Pages (pages from the ICD Manager case record database if the patient records are after that Full Case Records State that date and have no case records)
 3. **Partial Case Record Pages:** The purpose of this option is to preserve selected fields that pages users for searching and reporting purposes. The option keeps all case record data for cases created before the Partial Case Records State that date, except for the following two:
 - Date is field mapped in the Case Record Field Mapping window
 - Date is Case Record case defined field placed in the right box at the bottom of the window. Field facility should records and case defined fields should not be pages
- In the preceding screenshot, date is the patient, all and age case defined fields are preserved, as well as the date in the field mapped in the Case Record Field Mapping window.
- **Enhanced Patients the Associated Case:** Pages (pages from the ICD Manager case record database if the patient records are after that Full Case Records State that date and have no case records)

See the ICD Manager Configuration Guide Case Record Subscreen.

Page Records

1. **Select Fields in Page**
The Page screen appears. Note that only the Facility selection and the Page are active.
2. **Select a Facility to page records from.** Note that you can only page one facility at a time.
3. **Select one or more Pages**
The Page Dates and the options associated with each page are selected because active.
4. **Select Booking Bookings under Booking Full Case Record** if you want to copy those records to an active active coding.
5. **Enter the Page Dates for the pages you selected.**
6. **Select the other options, if any, associated with each page you are performing.**
7. If you are doing a certain case record page and want to include some case defined fields, select the fields in the left box at the bottom of the window and double click or use arrow keys them into the right box.

Note: You can also use **Find > Duplicate** to select a range of fields in **Find > Duplicate** to select multiple individual fields at the same time. Just click on **OK** to transfer them to the right box.

1. After you have selected and double-checked all of your purge parameters, click **Purge** to start the purge process.
2. If you want to continue, click **Yes**.
A progress window opens, followed by a screen indicating that the purge is complete and summarizing what was done.
3. Click **OK** to acknowledge completion of the purge.

Purge Audit Trail

Click **Purge Audit Trail** in the **Purge** screen to open the audit trail for tracking and case record purge.

Picklists and Worksheets

Overview

Picklists and worksheets are special kinds of printed reports that you use to obtain the supplies necessary to perform operations and to set up the GP for the procedures.

Types discussed in this chapter include the following:

- Picklist Overview
- Picklist by Item List
- Comprehensive Picklist
- Picklist Pricing Sheet
- Contents Picklist
- Worksheet

Picklists Overview

Picklists are lists of the supply items needed for operations that have been booked but not yet performed. Supplies and supplies for picklists are taken from the preferences cards associated with

Purchase and Workbooks

Purchase Overview

operations at the time that the purchase was entered. Purchases are then used to get supplies from the various inventories and deliver them to the operating units when they are needed.

Purchases are designed to allow the efficient ordering of supplies. However, options exist to also just enter a purchase for supplies such as fuel, weight certifications, which gives you the flexibility to use purchases to handle the more than just ordering supplies.

Note: The purchase of supplies are visual representations of the purchase and may, at times, not truly exactly be the purchase type. Always refer to the purchase type of the purchase for all accurate info.

Types of Purchases

There are three types of purchases, determined by how supplies are arranged on the list.

- **Case Case:** Items are grouped by procedures and operations.
- **Consolidated:** Items for all procedures needed for a given time period are grouped by type on the purchase.
- **Standard:** For two purchases, but lists all items in Procedures only.

User Defined Purchases and Workbooks

The H&M Storage system is delivered with a standard set of purchase lists and workbooks. In addition, administrators can use the Custom Report feature to create custom purchases and workbooks.

User-Defined: Customized Purchases and Workbooks. If needed, administrators can set a flag to turn off user-defined quantity. Administrators can turn on/inventories or order numbers. User-defined purchases and workbooks have increased in popularity because the freedom provided by the software meets each institution's needs.

Frozen Purchases

Case and consolidated purchases are said to be frozen as soon as they are entered. This means that the contents of a purchase does not change, even if the contents of the preferences used to create it do change, so that items and quantities that go into the case record are the same as they were when the purchase was entered.

There are two ways to edit supply items and quantities:

- You can edit items and quantities for a particular operation before the purchase is entered by selecting the **Editing and Entering Item Item Purchase** on the Storage Working feature, which doing this action affects only the purchase for a particular operation. The underlying preference set is not changed.

- After the cart is created and the case record is built, you can change supply items and quantities in the Description History screen. Again, changes made in Description History do not affect preferences used.

See [Add a Case Cart](#) for more info.

Supporting Supply Option

The case cart and associated cart items also have the option to forward Department Requests to supply and inventory system at the same time you print cart.

See the [JDE Manager Configuration Guide: Preferences Card Supporting Statements](#).

Preferences by Case Cart

Menu Tools > Manage Settings

Menu/Print Configuration > Filter

In case cart cart items, items are grouped by procedures and operations so that they can be placed in a case cart in the order in which they are dropped off at the site.

You can print case cart items two ways:

- Recommended: Through the Print Filter screen from the Print Configuration menu.
- Through Manage Settings.

How a Case Cart Filter Through Print Configuration Menu

Note: This topic shows how to print cart items if they are not filtered and have preferences used associated with them. If you encounter errors in addition to those shown in this topic, see [Printing Cart Items](#) for more info. For a complete explanation.

- Access Print Configuration > Filter card.
- The Print Filter card screen opens.

- Class Overview
- Problem-solving strategy
- The Class Year Problem-solving



The problem uses the default user-defined problem format. If there is no default format for the type of problem, the Manager uses the standard format.

- optional: Use with buttons to provide the pages of problems.
- To print the problems, use the

How to Use the Problem in the Manager

Note: This table shows how to print problems if they are not found and have no solution. The problems are listed in the table. The table shows the problems in the table. If you want to print the problems in the table, use the table. The table shows the problems in the table. The table shows the problems in the table.

- Print Problems in the Manager
- Print your Selection Options. Use the Manager.
- The Manager Problems table shows the
- Check the table for which you want to print problems.

Inventory worksheets are identified by a checkmark in the box to the right of the inventory. To select a inventory worksheet, check the box to the left of the inventory worksheet.

1. Item ID

The Item ID Problem appears:

Note: The problem uses the default unit without problem format. If there is no default format for the type of problem, the Storage unit the standard format.

to understand that an unit problem appears the page of problem.

to print the problem, click **Print**.

See Storage System Worksheet on page 25.

See Storage System Worksheet on page 25.

Consolidated Problems

Item ID Consolidation - Problem

Consolidated problem contains all items for all operations in the unit range. This is useful if multiple are needed in multiple worksheets, or if you are gathering all the materials for multiple units and for inventory forecasting.

If you want two worksheets for a inventory problem and 2 for an alternative problem, the consolidated for combined them and for 4 worksheets.

only problem to use unit, consolidated problem can only be printed from **Item ID Consolidation - Problem**.

If you print the Problem through **Item ID Consolidation - Problem** and select a Unit Group, you are printing the Problem for the materials of the specific units in the Unit Group.

If you print Problem through **Tools - Storage Preference Tools - Item Problem** and select a Unit Group, you are printing the Problem for the Preference Tools that have been associated with the Unit Group.

Item ID Consolidation Problem

Note: This procedure shows how to print problem if they are not stored and have preference units associated with them. If you encounter additional problems, see **Storage System Worksheet**, page 25. It is complete explanation.

When system problem unit is a group, the unit is that to print units that are not in unit group followed by units that is unit group that include them.

1. Select **Print Consolidating - Practice**

The Print Practice screen opens.

2. Select **Consolidation**

In **From Date** and **To Date**, enter or select the range of operation dates for which to print the practice.

Consolidate From Only Selected Practice is used to print practice problems that have been printed previously.

Consolidate From All and To All enters the range of the locations to search within worksheets. These are the last two fields.

Select the worksheets you want to print practice for by checking the check boxes to the left of each worksheet or clicking **All Regular Worksheets** or **All Pharmacy Worksheets**.

Note: Pharmacy worksheets are identified by a check mark to the left of the box to the right of the worksheet. To select a pharmacy worksheet, check the box to the left of the worksheet worksheet.

Select the **Facility** and **All Rooms** for which you want to print practice. If you select a Facility that includes **Phy Groups**, the option to select a **Phy Group** appears. If you select a **Phy Group**, you cannot select specific rooms.

Note: If you do not make any selections for worksheets or **All Rooms**, a practice for all worksheets and rooms will be printed.

3. Click **Return**

Practice processing begins. The Consolidated Practice appears.



6. To open the practice area click

Supply Forecasting

Master Data Configuration in Supply Forecasting

The first Supply Forecasting Report screen that you specify is a consolidated report designed to help in supply forecasting. An individual or a consolidated report means that it contains all items for all operations in the table range. The report does not include items in the 'Forecasting Method' column.

The report that you select specifies in the screen is also Consolidated Supply Forecasting, and it includes four columns that do not appear in other reports to help in supply forecasting.

- Material
- Plant
- Forecasting Method
- Forecasting Period

- Display the screen for specifying the report by clicking **Forecasting > Supply Forecasting**.
- Click on **Use Forecast Item ID as Release**. The Item Quantity is automatically included from the ID as Item release value. Selecting this option removes the Item Quantity from the Release column value in addition to the ID as Item release value.
- Click on **Show Filter Release value that is Equal to**. The value can be negative and will show up to four digits. If you enter a value here, items whose numbers exceed the value will not appear.
- In **From Date** and **To Date**, enter or select the range of operation dates for which to print the report.
- Click on **From ID** and **To ID**, enter the range of item numbers to appear within inventory. These are five digit fields.
- Select the inventory you want to print profiles for by checking the check boxes to the left of each inventory or clicking **All Regular** (in **All Pharmacy**).

Note: Pharmacy inventories are identified by a check mark to the left of the inventory. To select a pharmacy inventory, check the box to the left of the inventory inventory.

- Select the **Regulation** and **Off Hours** for which you want to print profiles. If you select a **Regulation** that includes **Peak Group**, the option to select a **Peak Group** appears. If you select a **Peak Group**, you cannot select specific hours.

Note: If you do not make any selections for **Regulation** or **Off Hours**, a profile for all inventories will be printed.

- Clicking **Release** displays a screen that prompts you to download preferences used to generate what data to show, print and what to add within the designated date range.

Item ID	Inventory	Release	Reg	Totals
100000	00	00000000	0	
100000	00	00000000	00000000	
100000	00	00000000	00000000	
100000	00	00000000	00000000	
100000	00	00000000	00000000	
100000	00	00000000	00000000	
				200

- Clicking **OK** displays the summarized profile for supply forecasting.

Printer Printing Details

This topic discusses additional options for printing profiles by user role as well as recommended printers.

Prerequisites

This topic assumes that you have already used the Storage Settings screen in the Print Profile screen from the Inventory menu to select the type of profiles and settings you are printing profiles for.

See Profiles by User Role on page 220.

See Recommended Profiles on page 220.

Overview

- If your system is set up to forward supplies to inventory when profiles are printed, print profiles (depending on configuration) are also added to specific addresses used for operations that do not already have addresses set. For off-storage addresses the role and storage that is a job setup.
- If your system is set up to forward supplies to inventory when profiles are printed, you will see some profiles in addition to the ones described above.
- These profiles will whether you want to forward supplies at that time or. If you have already printed the same profiles and recommended supplies. If you want to forward again.
- Profile recommendations are not included in printed profiles.

How Profiles

1. Step 1 is the Profile Printing screen (displayed by the Profile button in the Storage Settings screen) or **Profile** Print Profile screen.
2. If prompted, enter the procedures you don't want to print profiles for. Step 2 is the effect is that all procedures are selected. The final profile for complete settings and mostly in this case from. Other settings may present another option.
If you or more profiles have been from, either manually or through previous printing, you will be shown a message indicating that records cannot be selected.

Problems and Workarounds

Contents: Problems

If you click **Yes**, the profiles are treated as unique. That is, they are based on the content contents of the associated preference cards, which may differ from the preference cards as they were when the profiles were made.

If you click **No**, the affected profiles contain the same items and quantities as they did when they were made.

If one or more of the associated target combinations has no preference cards, a screen opens allowing you to select them.

5. Select a preference card to go with each procedure and click **OK**.

If your CRM Manager system is set up to transfer inventory information to your CRM customer management system when profiles are added, and the contents of one or more of the profiles have already been transferred, a screen gives you the following options concerning transferring settings:

- **All**
- **New Transferred**
- **None**

6. The screen indicates that the contents of some profiles have been transferred previously:

- Click **All** to transfer all of profile items including those that have already been transferred.

Note: The option means that some inventory items will be duplicated here.

- Click **New Transferred** to transfer only those profile items that haven't been transferred yet.
- Click **None** to not transfer any inventory updates for these profiles.

A series of status bars and message appears while CRM Manager completes your profile. Then the profile appears on the screen.

Note: If a profile currently contains nothing, or not user information is included in profile, contact the Print Shop Center for information.

Contents: Profiles

Menu: Tools > Manage Preference Cards

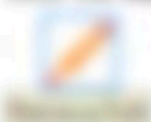
Contents lists, also referred to as Customer Profiles, are profiles created from the Preference Card database. They may not have a job number for add-on items, but they do not contain patient information. They are also used as part of maintenance processes. Contents lists are grouped by their associated preference cards and are used for managing marketing, ordering, adding the items in preference cards.

Although you may print contents printed to print supplies, you do not have the option of being prompted to select a printer when printing from an application with other levels of printing.

If you print Printouts through **Tools > Manage Printers/Forms > Print Printout** and select a **Print Group**, you are printing the Printouts for the Printers/Forms that have been associated with the Print Group. If you print the Printouts through **File > Printouts > Printout** and select a **Print Group**, you are printing the Printouts for the contents of the specific printer in the Print Group.

How to Printout

1. Select **Tools > Manage Printers/Forms**.
The **Manage Printers/Forms** screen opens.
2. Select the combination of printer/ports, outputs, procedures, etc. for which you want to print out.
3. Click the **Printout** button.



The **Manage Printers/Forms** screen opens.

4. Select one or more printer/ports and click **Print Printout**.
A screen allows you to specify which you want to print.
5. If your site has multiple facilities, you are prompted to choose a facility to print the printout for.
If your site has multiple facilities, select a facility. If the facility has sub-groups, the option to select a sub-group appears, but you are not required to select one. Click **OK**.

The **Printout** screen opens.
The printer uses the default user-defined printer format. If there is no default format for the type of printer, the Manager uses the standard format.

Note: If you print the printout and also you print the worksheet, the modified supplies are printed after the supplies that appear in the printer/ports.

See the **Off-Manager Configuration Guide: Manage Printers/Forms**.

Workbooks

Menu Tools > Manage Bookings

Menu/Prod Card/Inventory > Workbooks

You typically use workbooks to prepare a menu for a single or multiple bookings. Workbooks are different from products in that they are not specific, and they let the items be deleted as the items are no longer properly within the menu.

Also, workbooks contain some items, which are the real items often used to let the customer prepare preferences. As with products, the items and quantities in workbooks are taken from preference sets.

You also enter the operating menu staff normally enter supplies, and the staff is familiar with the location of each item. Workbooks are the best method of providing the ordering supplies for items. However, products that will be printed in order to those supplies for the menu.

Workbook Sort Order

Workbooks are first by an internal booking number. Then book number, quantity, book preparation, sequence, preference, and order number, and by finally the number within each section. (This sort is slightly different if you are including inventory location in the sort.)

Custom workbooks have multiple sort options. When custom workbooks print as a table, the order is first by unit, units that are not in unit groups followed by items in unit groups listed by the unit groups that include them.

Note: Workbooks are designed to represent a "copy" of a single preference set. For this reason, items defined as replaceable appear in workbooks as full in preference sets. The replaceable status of items is ignored in workbooks.

Worksheet Example

Worksheet for Booking

Customer: Last, First, Middle Initial Last 4, Birth date, S.S. Number

Room Number (Room)	Room Description (Room)	Rate
Room 101 (101)	Room 101 (101)	Rate 101 (101)

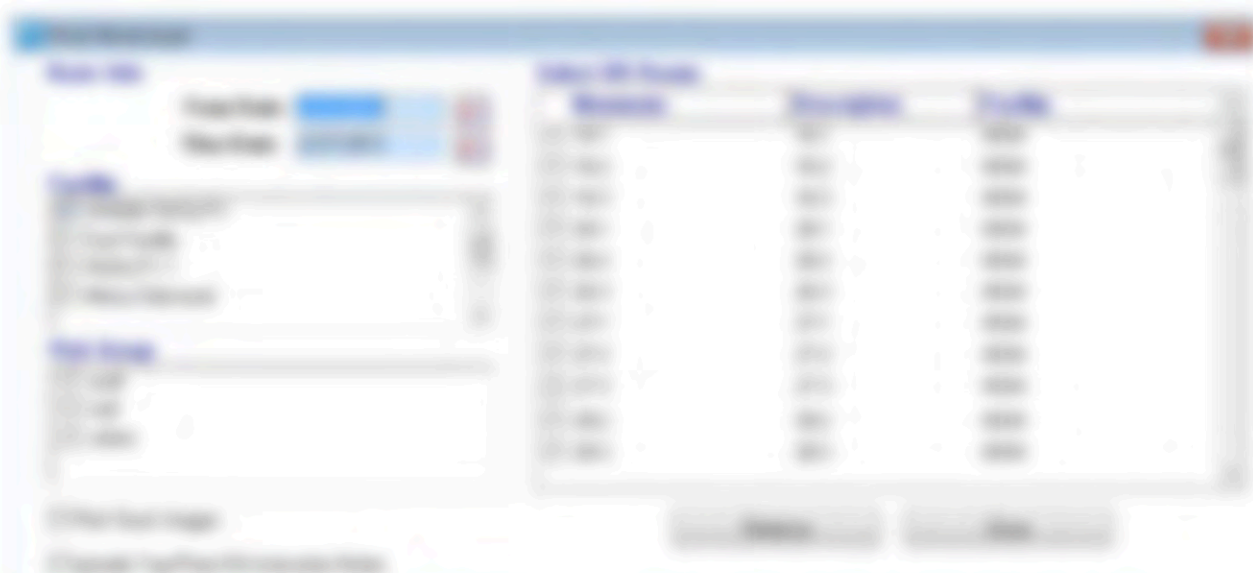
Name: _____
 Address: _____
 City: _____
 State: _____
 Zip: _____
 Phone: _____

Room Number	Room Description	Rate	Room Description	Rate
Room 101 (101)	Room 101 (101)	Rate 101 (101)	Room 101 (101)	Rate 101 (101)
Room 102 (102)	Room 102 (102)	Rate 102 (102)	Room 102 (102)	Rate 102 (102)
Room 103 (103)	Room 103 (103)	Rate 103 (103)	Room 103 (103)	Rate 103 (103)

Note: This worksheet is provided as a guide only. It is not intended to be used as a substitute for the actual booking process. Please refer to the actual booking process for all details.

How to Use

1. Select the room(s) you want to book.
2. The room(s) will be added to the room(s).



2. Select a **Table** image and **Table** image.

Select one or more facilities. If you select a facility that includes a job group, the option to select a job group appears, but you do not have to select a job group. If you select a job group, you select either specific job items.

Select **Table** image to have table image appear on your worksheet.

3. Use **Table**.

The **Table** Procedures in **Complex** Settings is include in **Procedures** worksheet. The **Table** Settings operations with multiple procedures. The procedures that have procedure and/or image collection work are selected by default.

Note: Depending on how your system parameters are set up, the **Table** **Complex** Procedures screen may not be available at your site.

Select the procedures you want to appear on the worksheet from the **Procedures** column.

4. Use **Table**.

The **Table** Procedures from the **Procedures** worksheet. The **Table** Settings is list of procedures or buildings for which there are no associated preference cards.

Select a preference card for each procedure. Then click **Table**.

Off Manager screens the Workbooks. Depending on the number and complexity of the worksheets, this may take a few minutes.

Note: The worksheet uses the default user defined worksheet format. If there is no default format for the type of worksheet, Off Manager uses the standard format.

Overview

You can use IBM Manager's standard report writing features to generate preformatted reports. You can generate reports of a wide variety of data and make the reports as specific or as general as you like. Buttons on the top of the screen allow you to scroll through the report, and a **Back**, **Next**, **Print**, and **Close** button are available.

This chapter provides detailed instructions for the following IBM Manager standard reports:

- **IBM Manager Report**
- **Inventory Report**
- **Utilization Report**
- **Work Time Utilization Report**
- **System Utilization Report**
- **Work Utilization Report**
- **System Average Work Length**
- **Performance Cost Usage Analysis**
- **Performance Cost versus Work Report**
- **IBM Performance Analysis**
- **Cost Analysis Report**

Reports

Off-Schedule Report

- Quality Schedule Report
- System Schedule Report

If you cannot make any of the pre-formatted reports meet your needs, use the information about external reports in the Off-Schedule Configuration Guide to learn about creating your own reports. Another option is the Off-Schedule product, which delivers a high degree of freedom and control regardless of how it is comparing off-schedule. See also *Creating External Reports* at page 10.

Note: For Quality Schedule reports, please see the Quality Reporting Tool Configuration and Help Guide. The Quality Reporting Tool runs in a web browser, and it allows you to reporting Quality Schedule to government agencies.

Off-Schedule Report

Menu Reports > Off-Schedule

The Off-Schedule Report shows you to see a daily view of the Off-Schedule while adding and specify which projects and items you want included in the report.

Access to Off-Schedule Report

1. Menu Reports > Off-Schedule

The daily Off-Schedule screen looks like this:

2. Specify Pages and the Date, Date Options, and Priority

1. Select the **Supplements and Reserves** you want included in your report. (The default is to select all.)
2. Click **OK**.
You return to the Schedule Report screen.
3. You can move through the pages of the report by clicking the controls in the upper left-hand corner of the screen.

Schedule Reports

Menu Reports in Schedule

Off Manager's Schedule Reports give you many options for viewing and printing Off meeting schedules.

Generate an Off Meeting Schedule Report

1. Select **Reports in Schedule**.
The Off Meeting Schedule Selection screen appears.
2. Highlight the type of report you want to see, then click **OK**.
The Report screen opens.

- Enter a date range and select the **Building Relationships** you want to add.
- Select the **Options** with the the **Report Options** in the **Report Options** section. Use the **Report** with your report.
- Enter **Report Range** section that you want your report added.

Example: If you are generating a report including all suggested data scheduled to the report, select the **Report** to also include other associated with report is scheduled to perform.

- After selecting your parameters, click **Report**.
The following screen appears:

- If necessary, give your report a title and then click **OK**.
The report appears.

Block Time Utilization Reports

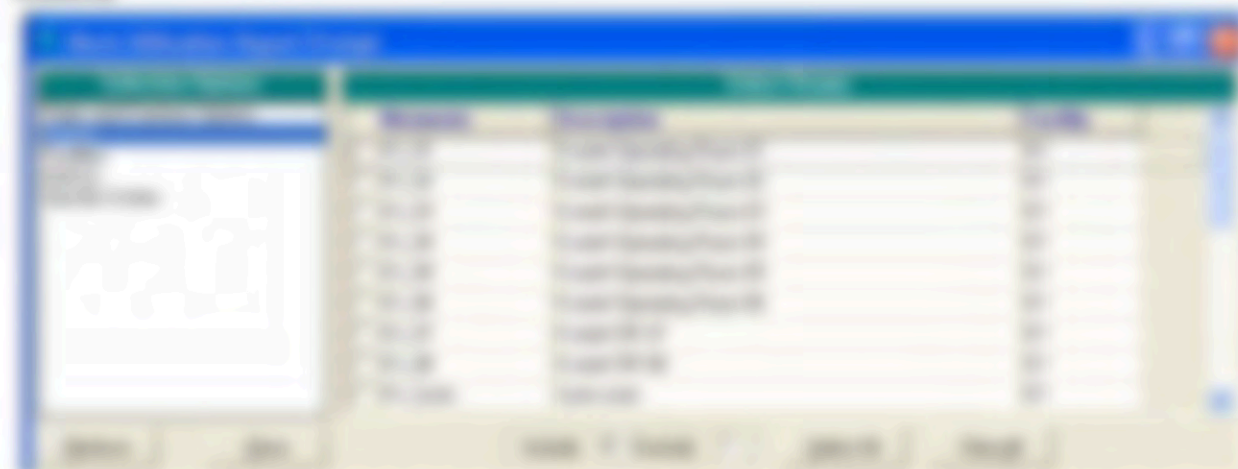
Block Reports - Block Time Utilization

Block Time Utilization Reports allow you to see how efficiently your block time is being used.

Generate a Block Time Utilization Report

1. Select **Reports - Block Time Utilization**.
The Block Utilization Report Manager screen appears.
2. Select the date you want to appear in your report under **Selection Options**. (See [Accessing a Block Time Utilization Report](#) on the previous page.)
3. After selecting the date you want, then choose that option for **Selection Options**. (See [Reports](#).)
Your Block Time Utilization Report appears.

Reports



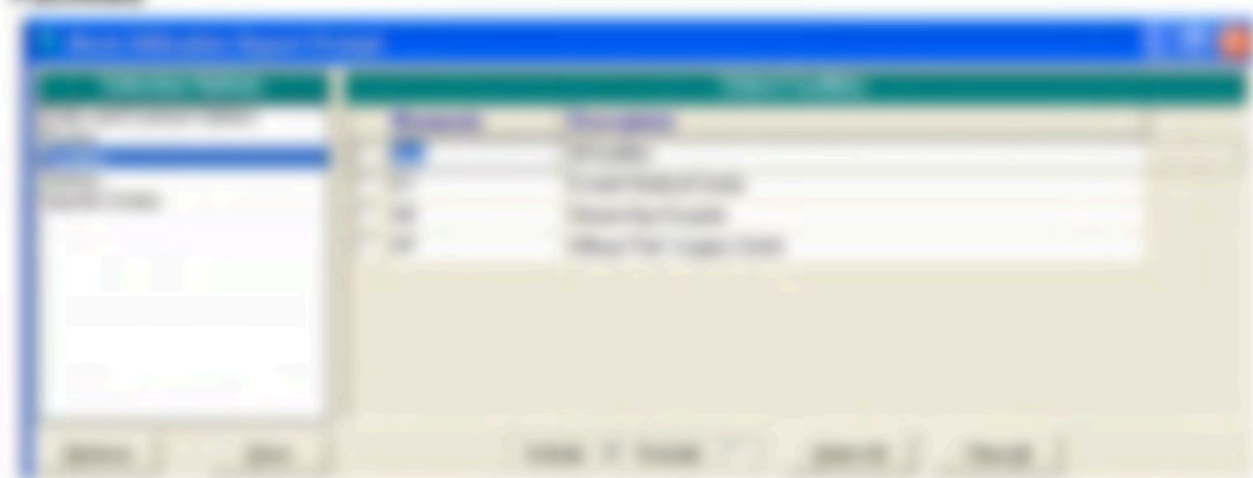
Block	Description	Time
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	
12/15	12/15/2015	

Make any selections on this page if you only want specific reports where **Supervisor/Group** etc. are being worked. If you want to have all reports selected, there is no need to check any reports and all will be included in the report.

Reports

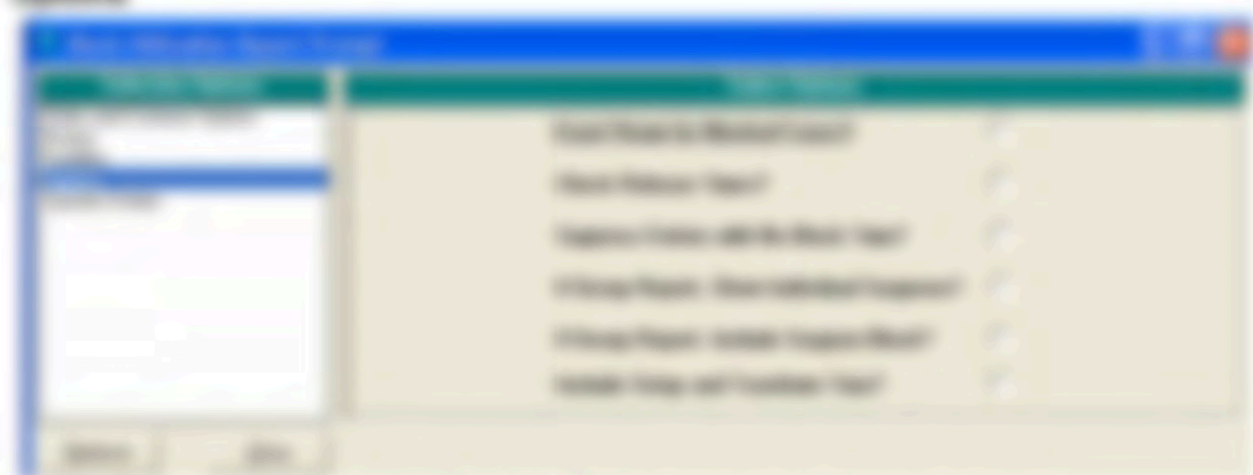
Work Time Allocation Reports

Facilities



Setting a selection on this page might be useful if you wish to generate a report without having to check all the items related to that facility on the previous page. Again, nothing checked will run the report for all facilities.

Options



The Options menu item under **Reports\Options** contains the following options:

- **Show Hours for Week Report?** Select to include only weeks performed in a particular week within the week time. Do not select this if you want to include weeks that were performed within the week time, but were performed in a different week.
- **Show Week Report?** Select if you want to include only weeks located within a Week time was released. Do not select this if you want to include weeks located within the week time, but located after a Week time was released.

Report Block Time Utilization Report

- **Generate Reports with the Block Time?** Select to add entries with no booked block times within the Report to Date and From to Date. Or not select if you want all entries to appear on the report, whether they have booked block time or not.
- **If Group Report, Show Individual Schedulers?** Select if you are generating a Group Report and want individual schedulers, with and not part of the group, to appear.
- **Include Setup and Teardown Time?** Select to include setup and teardown times in the Block Time Utilization Report.
- **If Group Report, Include Schedulers Block?** Select to show the scheduler individual times as well as group time when setting blocks for groups.

Note: The group gets credit for the scheduler's time as well as the group time. Because schedulers can be in multiple groups, the same scheduler's block time is added to every group the scheduler is in for the report.

Specific Entries

In this screen the selection options determine what type of report is constructed. If all entries are selected there is no need to check any entry box. With **Select All**, all items from the list are included automatically when nothing is selected. This one option can be selected at a time and the report corrects the block type on the entry reporting structure. The only exception to this is selecting Schedulers through the entry options in the selection options page for "If Group Report" selections. There are options near the bottom of the screen to include or exclude entries as well.

Report Data

The following graphic is a typical Block Time Utilization Report. This section explains the data in it.

- **Block Used:** Total time the surgeon spent performing cases within the block time.
- **% of Block Used:** Percentage of the total Block Time that was actually used (Block Time/Block Used).
- **Block Unused:** Total block time that was not used (Block Time minus Block Used).
- **% of Block Unused:** Percentage of block time that was not used (Block Unused/Block Time).
- **Out-Block Used:** The total time the surgeon spent outside the defined block (Case Time minus Block Used).
- **% of out-Block used:** Percentage of a surgeon's time spent outside the block.

Time to Date

The Time to Date information of the Block Time Utilization Report shows the same statistics as the Period to Date information. The Time to Date is from January 1 until the current selected date in the date range (Period to Date).

You have the option of changing the Time to Date as it applies on the first day of your fiscal year. Contact the Price Team Center to make this change.

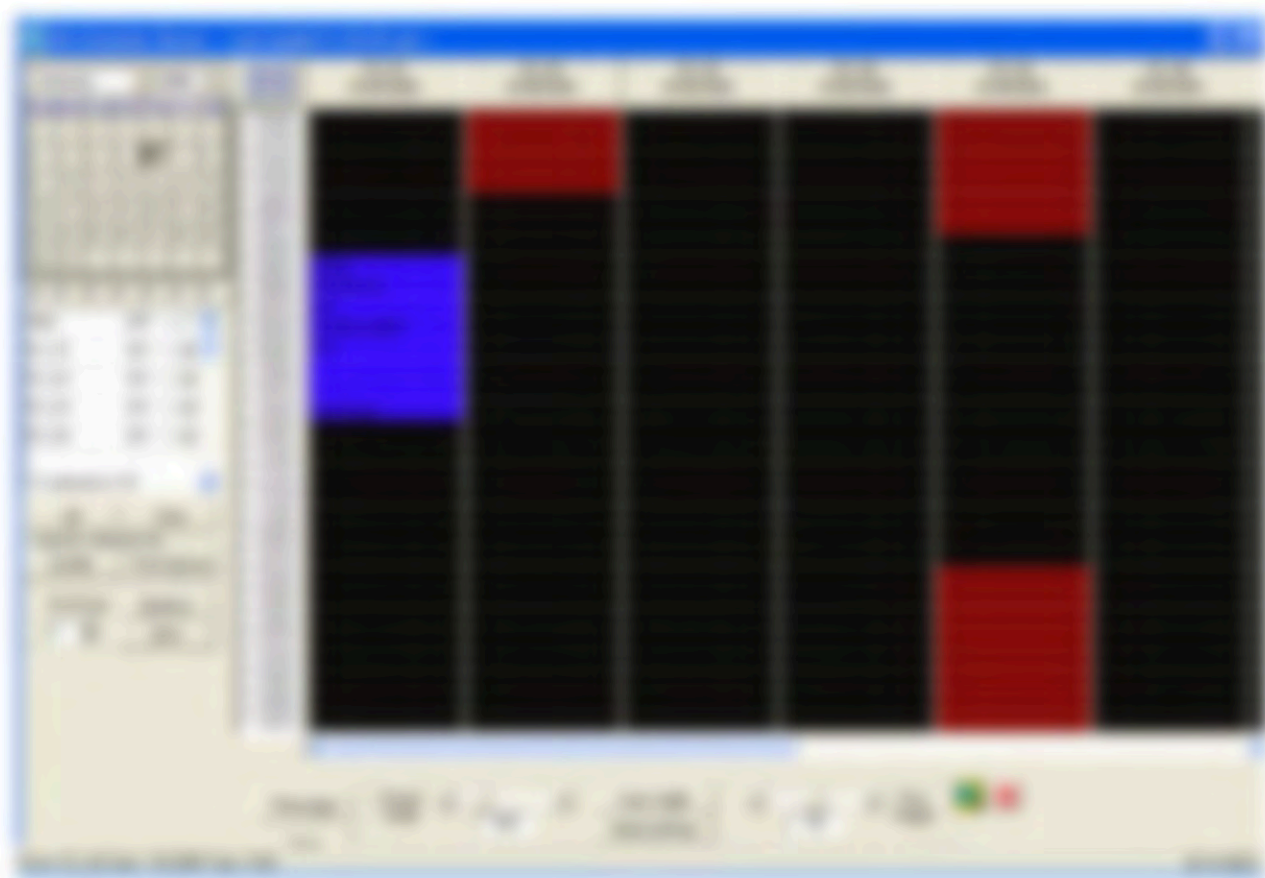
Report Totals

Reported: Totals shown at the bottom of reports are for all surgeons, even if they are not included in this report.

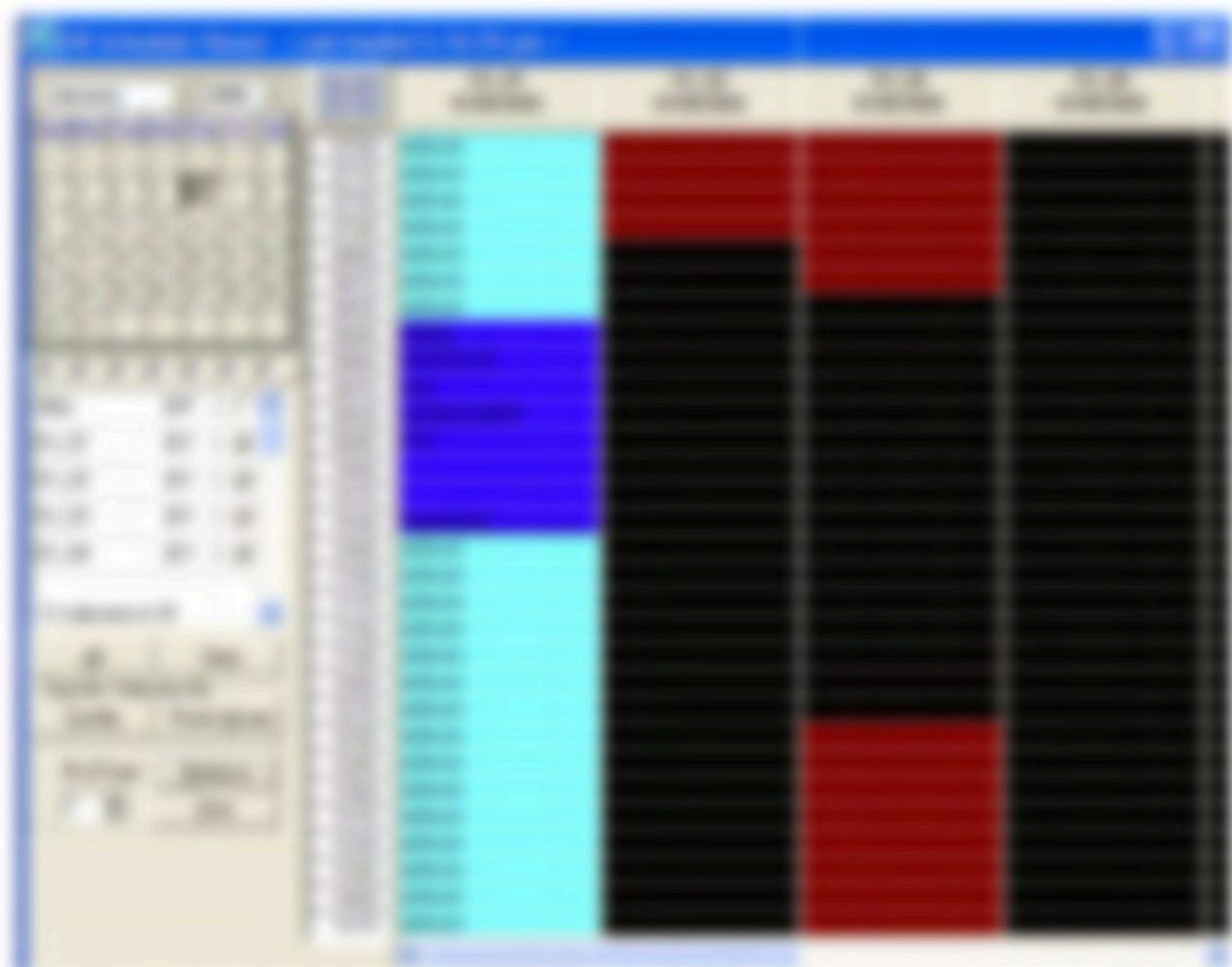
The Effect of Specific Parameters on Block Time Utilization Reports

Example 1

The following graphic shows an example of block time assigned to Dr. Wilson as it would have looked on the day of surgery (11/16/2006). The block assignments after the assigned release time is the block parameter value which is considered an automatic release within the system.

**Example 2**

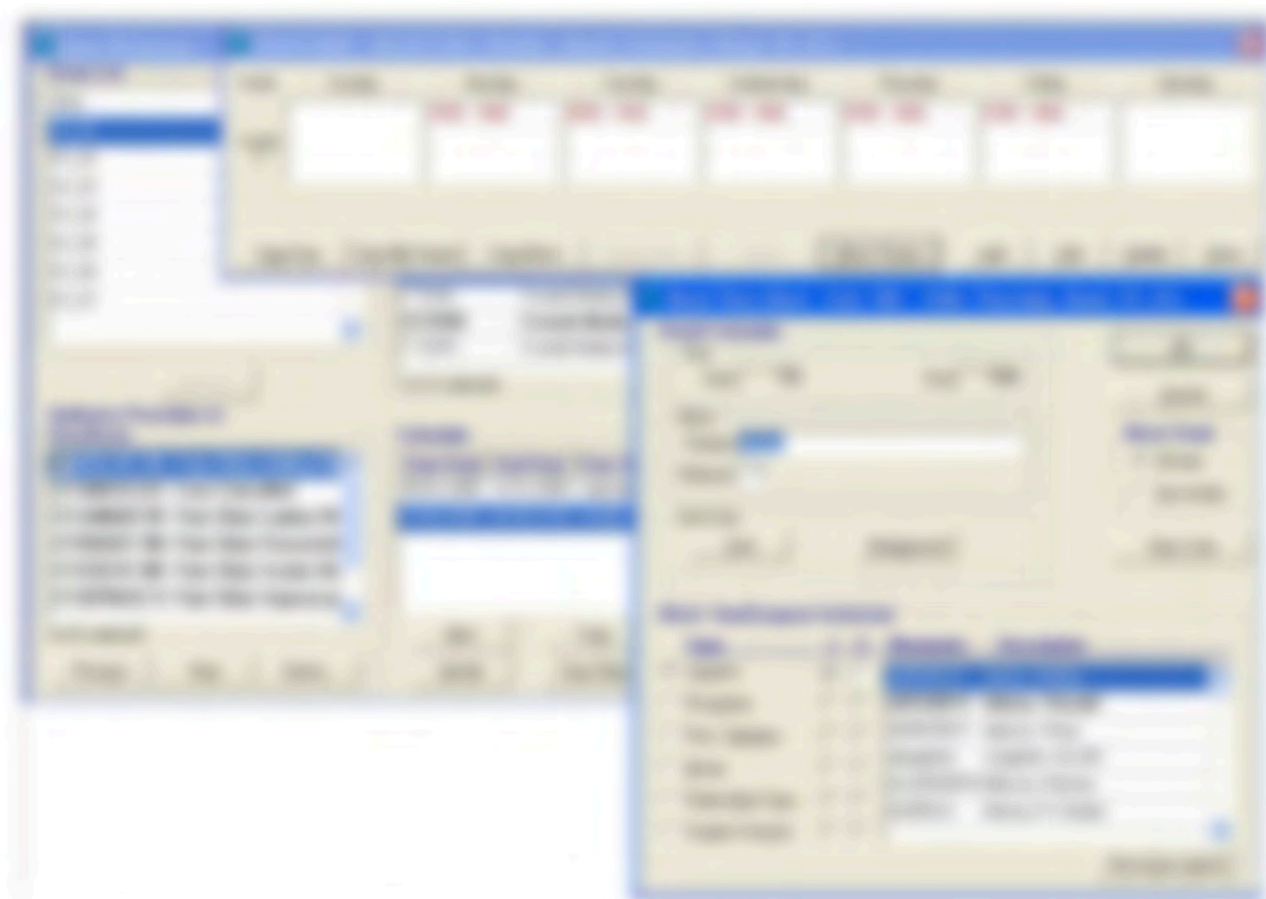
The next graphic shows how the block appeared as it did while before the release was scheduled on the job.



The right time area above shows the block assigned to the address from 0700 to 1800, and the left time area is the booking.

Example 2

The block defined in the calendar above in the previous example would be defined using the parameter: `block=1`. This example shows that the address has a block on Thursday from 0700 to 1800 with 10 hours above time in the 20. The bookings shown in the defined block time are now associated with resource `address` and `block=1` and all of these time between 0700 and 1800 are included in the Block time column of the 0700 report.



The additional parameters in the report represent the following scenarios:

- 10. Nelson performed the procedure in the 2nd, 3rd, 4th, 5th, 6th, 7th, 8th, 9th, 10th, 11th, and 12th hours of the morning, and the change nurse decided to place the emergency in the 1st.
- 11. The Nelson's findings were originally entered in the 1st. Now a computer system can use the 1st's report using only the date information.

Example: From Date — 1/1/2000 and To Date — 1/1/2000

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		Revenue by State									
		2000					2001				
		CA	TX	FL	NY	IL	CA	TX	FL	NY	IL
Q1	Revenue	100	120	80	90	70	110	130	90	100	80
Q2	Revenue	110	130	90	100	80	120	140	100	110	90
Q3	Revenue	120	140	100	110	90	130	150	110	120	100
Q4	Revenue	130	150	110	120	100	140	160	120	130	110
Q1	Profit	60	70	50	60	40	80	90	60	70	50
Q2	Profit	65	75	55	65	45	85	95	65	75	55
Q3	Profit	70	80	60	70	50	90	100	70	80	60
Q4	Profit	75	85	65	75	55	95	105	75	85	65

16. Although single cells cannot all work at once, their tiny brains do nothing and can never work in parallel. As long as the thinking and data work are done together, this is considered a sufficient gain.

From State: New State:

Include Weekends? ☐ Which Case Records? ☒ Selected ☐ Unselected ☐ Both

Breakdown by Top of the Week? ☐

Include Year to Date Statistics? ☐

HR Manager: Eugene Black Time Allocation Report

		Total HR Manager's Available Hours: 160.00 Available Hours: 160.00 Hours Available: 160.00									

[Full Storage Capacity Report](#) [View Utilization Report](#)

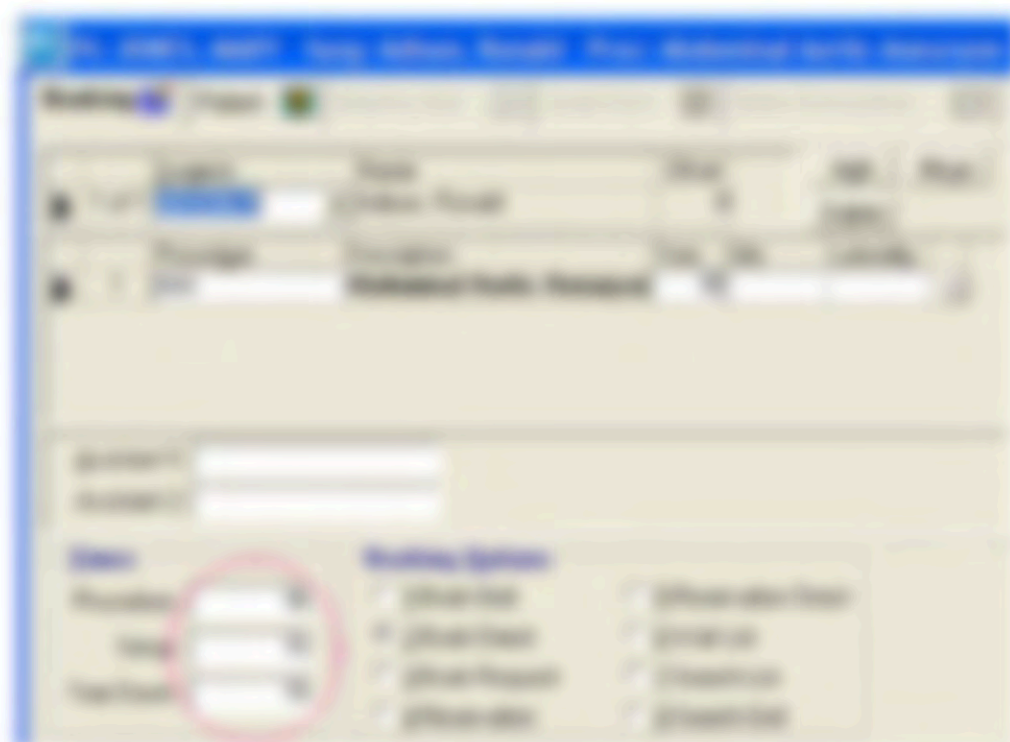
Figure 1: A screenshot of a spreadsheet showing a table with columns for 'Project', 'Status', 'Priority', 'Due Date', 'Assignee', 'Comments', and 'Action'. The 'Status' column is highlighted in pink. The 'Action' column contains a dropdown menu with options: 'Assign', 'Unassign', 'Cancel', 'Delete', and 'Refresh'.

In the example in Figure 1, trading was at \$1. If the new asset was at \$1.25, using the "Buy When the Market Falls" strategy would result in buying at the new price of \$1.25.

Question	Answer
What is the purpose of the 'Data' tab?	It is used to enter and manage data.
What is the purpose of the 'Formulas' tab?	It is used to create and manage formulas.
What is the purpose of the 'References' tab?	It is used to manage cell references.
What is the purpose of the 'Functions' tab?	It is used to insert and manage functions.
What is the purpose of the 'Data Tools' tab?	It is used to manage data tools.
What is the purpose of the 'Developer' tab?	It is used to create and manage macros.
What is the purpose of the 'Review' tab?	It is used to review and protect the worksheet.
What is the purpose of the 'Home' tab?	It is used to format the worksheet.

[illegible][illegible]

Question	Answer
1. What is the purpose of the 'Group' field?	Group Name (e.g. 'Marketing Team')
2. How many groups can be created?	Unlimited
3. Can a group be deleted?	Yes
4. Can a group be renamed?	Yes
5. Can a group be moved to a different category?	Yes
6. Can a group be shared with other users?	Yes
7. Can a group be used to track progress?	Yes
8. Can a group be used to assign tasks?	Yes
9. Can a group be used to create reports?	Yes
10. Can a group be used to create charts?	Yes



The screenshot shows the 'New Project' dialog box in Microsoft Project. The 'Project Name' field is empty. The 'Start Date' is set to 1/1/2000. The 'Finish Date' is set to 1/1/2000. The 'Project Manager' field is empty. The 'Task Name' field is empty. The 'Task Type' is set to 'Task'. The 'Duration' is set to '1 day'. The 'Task Name' field is highlighted with a red circle. The 'Task Name' field is highlighted with a red circle.

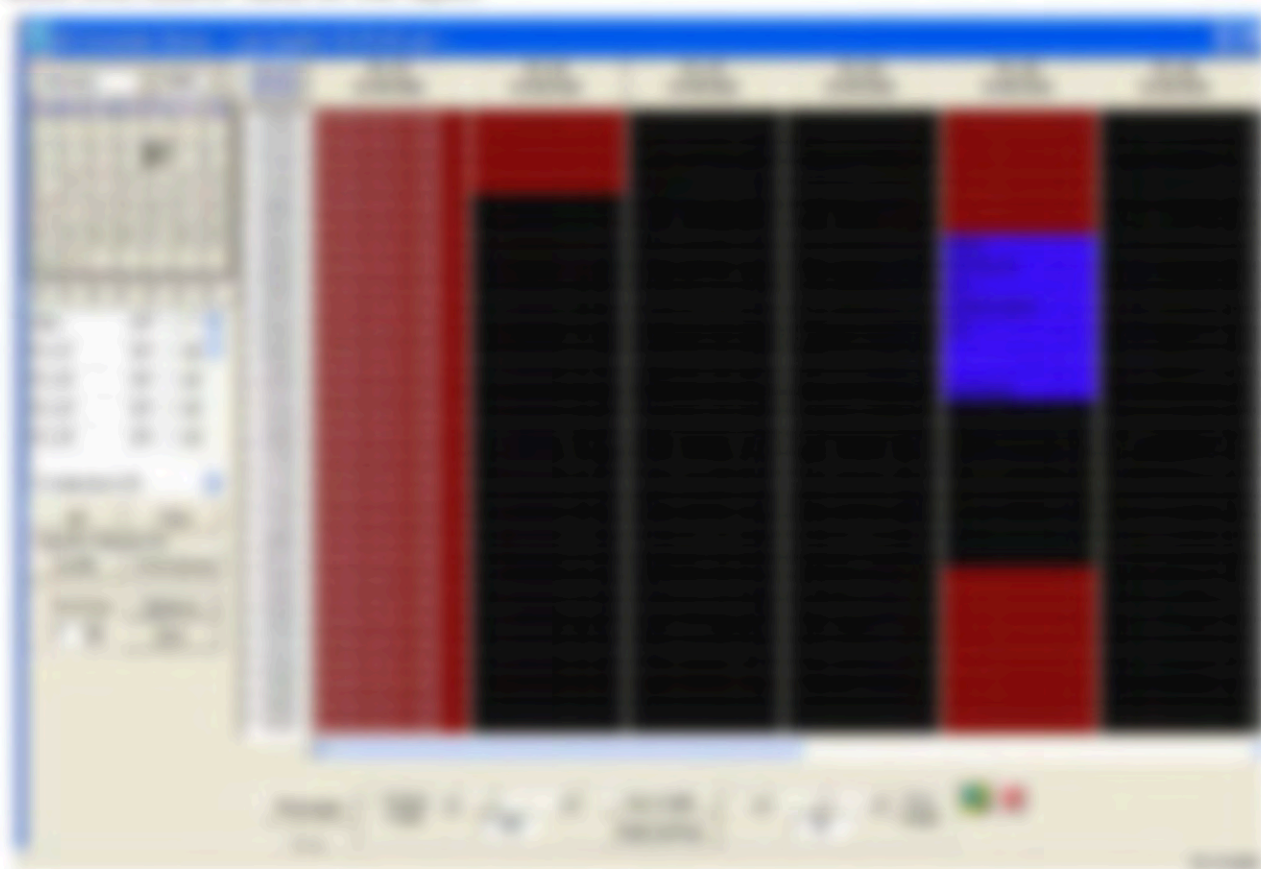
The disclaimer in the sample does not actually create or remove any trust that is the result of reliance. Creating the trust creates the system to remove the default rule in the system that any trust attracts jurisdiction. If you do not trust the law, and there is a trust law designed to a trust type in the trust act the trust, the system includes the law even though the law could not be altered. This is another trust "trust against" the system of trust.

Alt Manager - Project Block Time Utilization Report

Report generated on: 10/10/2010 10:10:10 AM
Report generated by: [User Name]
Report generated for: [Project Name]

		Resource Data												
		100	100	100	100	100	100	100	100	100	100	100	100	100
Project		100	100	100	100	100	100	100	100	100	100	100	100	100
Total		100	100	100	100	100	100	100	100	100	100	100	100	100

In the following report example, the Project column shows Resource Block utilization, and there is no Block Time column value in the report.



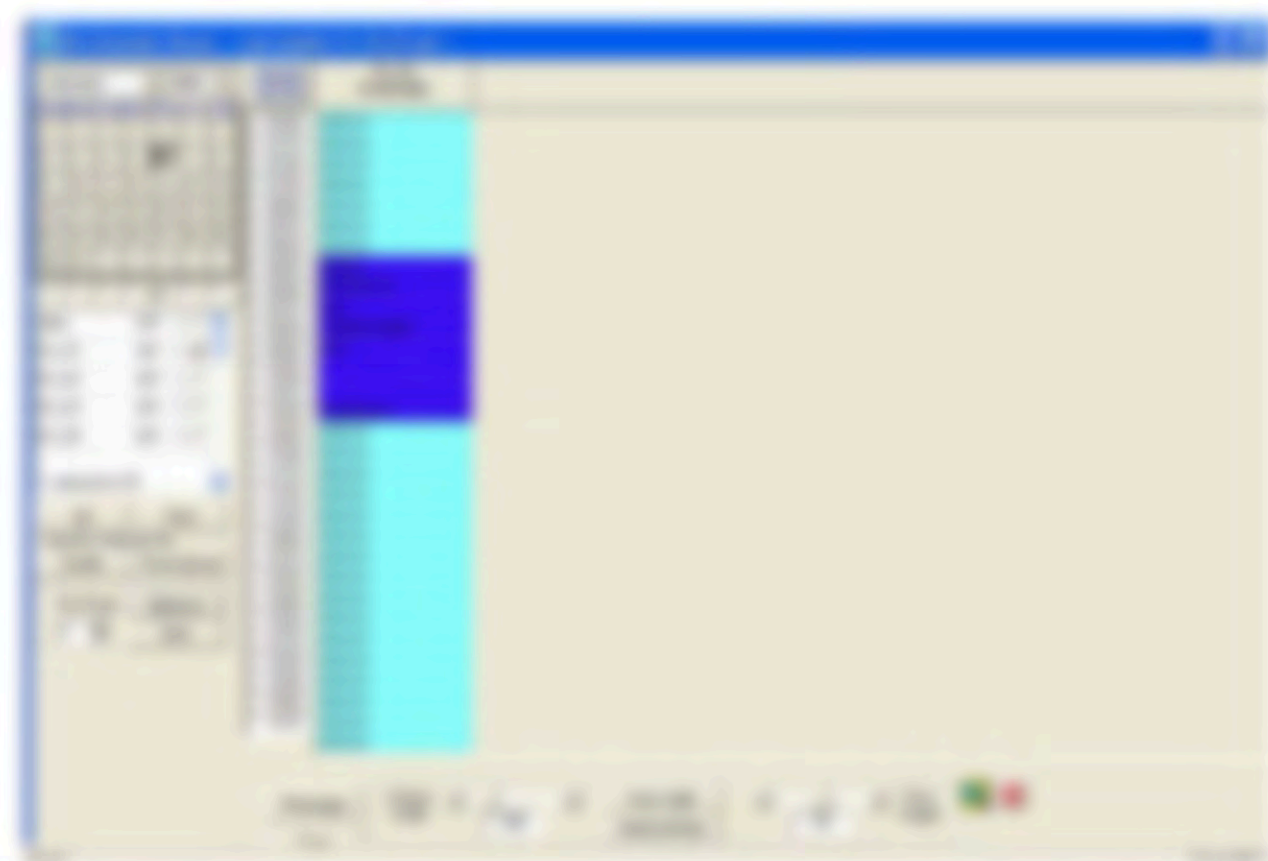
See the preceding footnote about access to the Phase 2B up to 50% off when membership was required. This is about 10% below the most significant rate observed and now the rate was raised to 50% off. The Phase 2B online app is about 50% off on new releases that are not



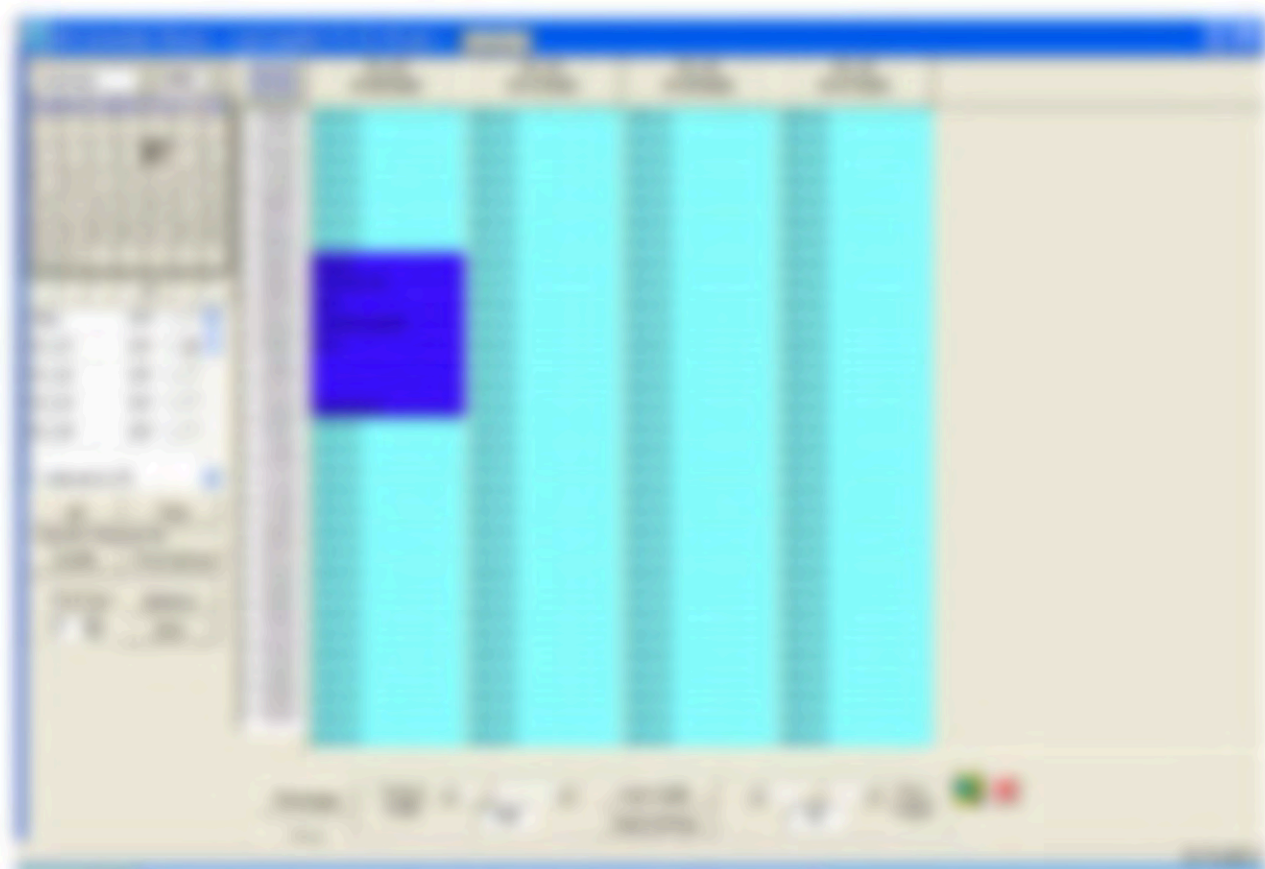
It is the responsibility of the publisher to ensure that the information in this book is accurate and that the publisher is not liable for any loss or damage arising from the use of the information. The publisher is not responsible for any loss or damage arising from the use of the information. The publisher is not responsible for any loss or damage arising from the use of the information.

The Effect of Releasing Weeks on Work Time Utilization Reports

The author declares that nothing stands against the publication of the IFC report.



This window displays a block for the selected job with the system loading offset up in terms of the processing resources. This block has been defined as a Windows block in the block parameters in the main window for job 10. When this report is the system automatically turns this block is open available time for the corresponding job. This also means this time is allocated as assigned time to the selected job. Block Time Utilization report whether or not a loading or open block was completed on this job.



The preceding graphic displays all of the blocks in blocks for January 2005 as shown in all dates in month headings.

all Manager Report Block Time Utilization Report

		Report to Date											
		1/1	1/2	1/3	1/4	1/5	1/6	1/7	1/8	1/9	1/10	1/11	1/12
10:00-11:00	1	1	1	1	1	1	1	1	1	1	1	1	1
11:00-12:00	1	1	1	1	1	1	1	1	1	1	1	1	1
12:00-13:00	1	1	1	1	1	1	1	1	1	1	1	1	1
13:00-14:00	1	1	1	1	1	1	1	1	1	1	1	1	1
14:00-15:00	1	1	1	1	1	1	1	1	1	1	1	1	1
15:00-16:00	1	1	1	1	1	1	1	1	1	1	1	1	1
16:00-17:00	1	1	1	1	1	1	1	1	1	1	1	1	1
17:00-18:00	1	1	1	1	1	1	1	1	1	1	1	1	1
18:00-19:00	1	1	1	1	1	1	1	1	1	1	1	1	1
19:00-20:00	1	1	1	1	1	1	1	1	1	1	1	1	1
20:00-21:00	1	1	1	1	1	1	1	1	1	1	1	1	1
21:00-22:00	1	1	1	1	1	1	1	1	1	1	1	1	1
22:00-23:00	1	1	1	1	1	1	1	1	1	1	1	1	1
23:00-24:00	1	1	1	1	1	1	1	1	1	1	1	1	1
Total	1	1	1	1	1	1	1	1	1	1	1	1	1

The preceding example shows all 4 Thursday's in January 2000 for the subject's stock as 000000.

If the subject calls to request to immediately release the stock as 00000000 because he knows he will be out of town, you can open the software's menu, **Options**, and right-click on the stock to display the following menu and message prompt. Use the option **Release Stock** to open which stock is reportable and for any subject or group.

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

Release Stock

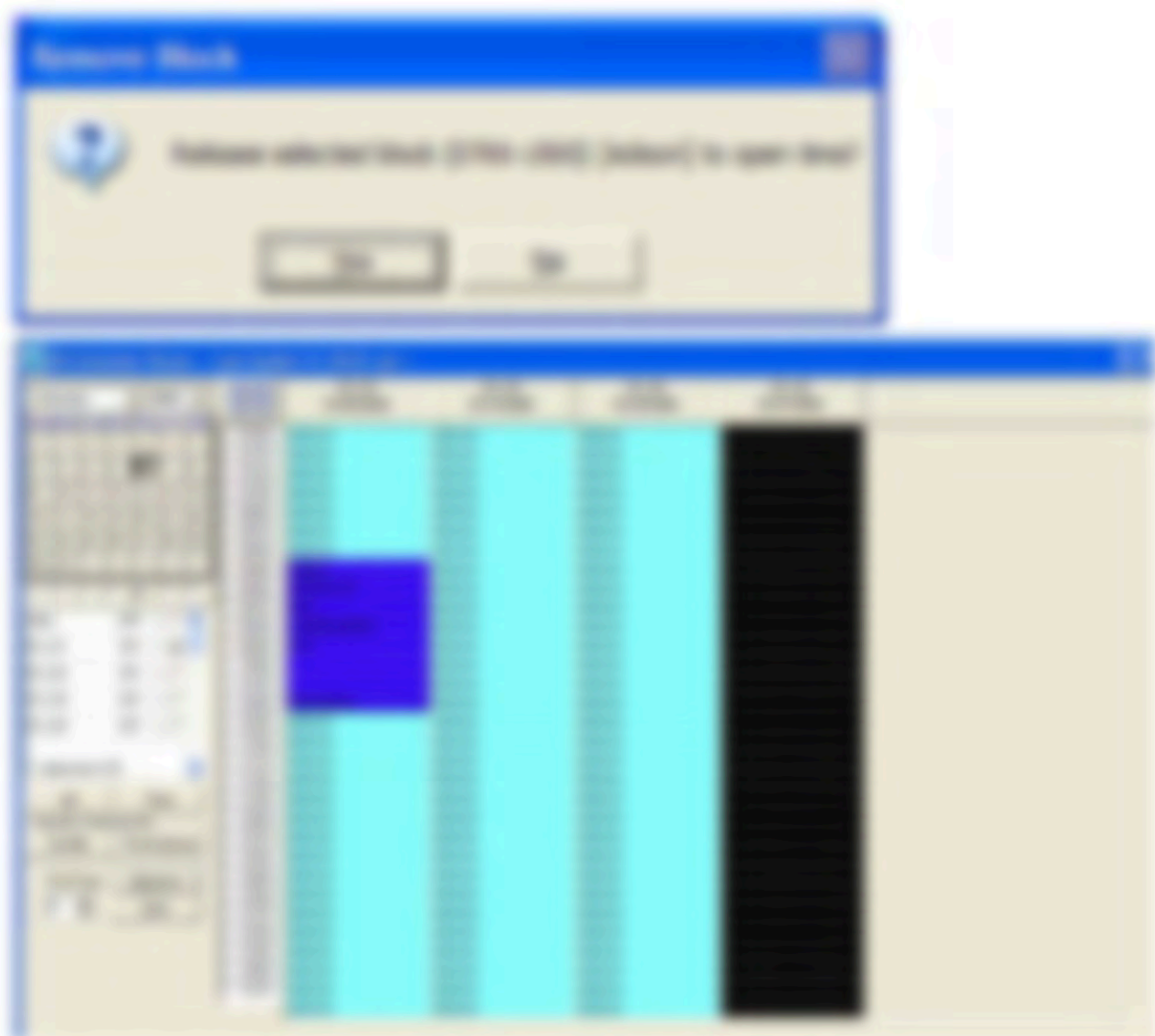
Release Stock

Release Stock

Release Stock

Release Stock

Release Stock



The following example shows the 7780-0000 block release.



The preceding Surgeon Work Time Utilization report shows the last Thursday in January 2008 (except weekends, which the system considers as if it were weekend, and which days are used against the balance of current block time). Note the denominator for block time is only 24.00 hours.

Many variations of options selected for the Surgeon Work Time Utilization report can have differing results on the output. You may want to practice setting up the report as well as with specific options that to achieve one set of results, and then compare other options to achieve secondary results to ensure you determine the best utilization of block time in your OR.

Surgeon Utilization Report

Menu Reports > Surgeon Utilization

Surgeon Utilization Reports allow you to see how time efficiently your surgeon time is being used. To compare actual surgeon utilization times, Off Manager uses the following:

- The parameters set in the Case Record Field Mapping Dictionary
- Times entered in completed case records

Generate > Surgeon Utilization Report

1. Select Reports > Surgeon Utilization

The Surgeon Utilization Report Prompt screen opens.

2. Select the date you want to appear on your report.

The Options menu item under Selection Options contains the following choices:

- **Surgeon as Table** (Choose whether you want your statistics related out, or averaged, for each day Period to Date and the Time to Date)

- **Report as Group:** Choose whether you want your report broken down by individual surgeon or by Surgeon Work Time Group.
- **Include Periods For Open Work Time:** Select if you want to include the times that rooms were closed as part of the open available work time.

- After selecting what data you want in your report, click **Review**.
- Your Surgeon Utilization Report opens.

Report Data

Below are explanations of the Surgeon Utilization Report measures. Review to learn what you find the specified data range, and that is then used as that measure through the data report data specified in the Period to Date range (see 10.1.1.10), unless otherwise specified.

- **Total Cases:** The number of cases performed by the surgeon.
- **% of Cases:** The percentage of the total cases of all surgeons performed by the surgeon.
- **Total Time:** Total hours/minutes of the surgeon's work.
- **% of Total:** The surgeon's percentage of time spent on cases compared to the total time for all surgeons (Total Time/Total for the Surgeon).
- **% Available Time Used:** Percentage of the total available time total time that all rooms were open that the surgeon spent performing cases.

Note: Totals shown at the bottom of reports are for all surgeons, including those not in this report.

Resource Utilization Reports

Menu Reports > Resource Utilization

OH Manager's Resource Utilization Reports allow you to see how efficiently you are using your operating rooms.

To compute actual room utilization time, OH Manager uses the following:

- Room dictionary schedule is schedule available in room status time.
- Reservation set in the Case Room Field Mapping dictionary.
- Time entered in completed case records.

Reports

Report Information Report

Generate a Report Information Report

1. Select Reports > Report Information

The Report Information Report Prerequisite screen opens.

2. Select the date you want to report on your report. Then, click Generate a Report Information Report on page 12/13.

The options menu that opens **Selection Options** contains the following choices:

- **Predefined Time**: Select a time range to limit the report to cases performed within certain times. If a case is performed partially within the time range, the report includes only evidence from the portion within the specified range.
- **Show Records Based on Time Range**: Select to show persons based on the selected time range, either from or until available time.
- **Source**: Select **Open** to include only records that were defined as Open in the Records dictionary, either the cases were performed. Select **Closed** to include only cases performed in records defined closed in the Records dictionary. Select **Both** to include Open and Closed records.

Note: Records based on the Predefined Time dictionary are considered closed.

- **Include Inactive Records**: Select to include records currently defined as inactive in the Records dictionary.
- **Show Averages as Totals**: Select **Averages** to use the averages for the time in days. Select **Totals** to use totals for statistics.

3. After selecting the date you want to your report, click **Generate**.

Your Report Information Report opens.

Report Data

Below are explanations of the Report Information Report Statistics. Records in this table are from the specified time range, and they in this table are from January 1 through the next month date specified in the Filter to Date. Date: Jan 1, 2000, to June 30, 2000 (which difference specified):

- **Total Cases**: The number of cases performed in the month.
- **Total Time**: Total number of hours and minutes it took to perform the month's cases. The time is based on whether Time and This table have been selected for Report Information in the Case Record Field Mapping screen.
- **Available Time**: Hours and minutes that the month is defined as Open in the Records dictionary.
- **% Available Time Used**: Percentage of the month's available time in which cases were actually performed. $\text{Total Time} / \text{Available Time}$.
- **% of 24-Hr Used**: Percentage of time cases were actually performed in the month, assuming the month was available 24 hours a day.

Surgeon Average Case Length

Menu/Reports > Surgeon Average Case Length

The Surgeon Average Case Length Report allows you to see the average time it takes surgeons to complete their cases. This report provides complete cases. It deals only with cases that have one surgeon and one procedure.

To calculate these times, ICF Manager uses the following:

- Procedures set in the Case Records Field Mapping Dictionary
- Times entered into completed case records

Access > Surgeon Average Case Length Report

1. Menu/Reports > Surgeon Average Case Length

The Surgeon Average Case Length screen appears:

2. Select the Case Types you want to appear on your report:

- **Scheduled Case Type:** Pulls from case records that are linked to specific bookings
- **Unscheduled Case Type:** Pulls from case records that are not linked to specific bookings

Reports

Preference Card Usage Analysis

1. Click or select a **Minimum Sample Size**. This is the minimum number of cards that must be the subject before an average card length is generated for them.
2. Specify the **Procedure**, **Frequency**, and **Month** you want to appear on your report. The default is all.
3. Click **Run**.
Your Average Card Length Report appears.

Report Statistics

The following statistics appear on your Average Card Length Report:

- **Count** The number of cards performed.
- **Mean** The average means time it took to perform the cards.
- **SD** Standard Deviation is a measure, with you, the degree to which each value is a far value from the mean of all the values in the set. The smaller the standard deviation, the less each value varies from the mean.
- **SD + ME** Mean plus Standard Deviation.

Preference Card Usage Analysis

Menu Reports > Preference Card Usage Analysis

The Preference Card Usage Analysis Report analyzes the about items in a range of preference cards that have been used over a period of time to tell you how many of each sample item you are actually using compared to the number specified on your preference cards. You can then use the results entered to adjust the quantities of items specified on the preference cards.

Run a Preference Card Analysis

1. From the Reports menu, select **Reports > Preference Card Usage Analysis**.
The Select All Facility screen appears.
2. Select the facility whose preference cards you want to analyze. If you group cards in the facility, you can select a card group. Click **Select**.
The Preference Card Usage Analysis screen opens.

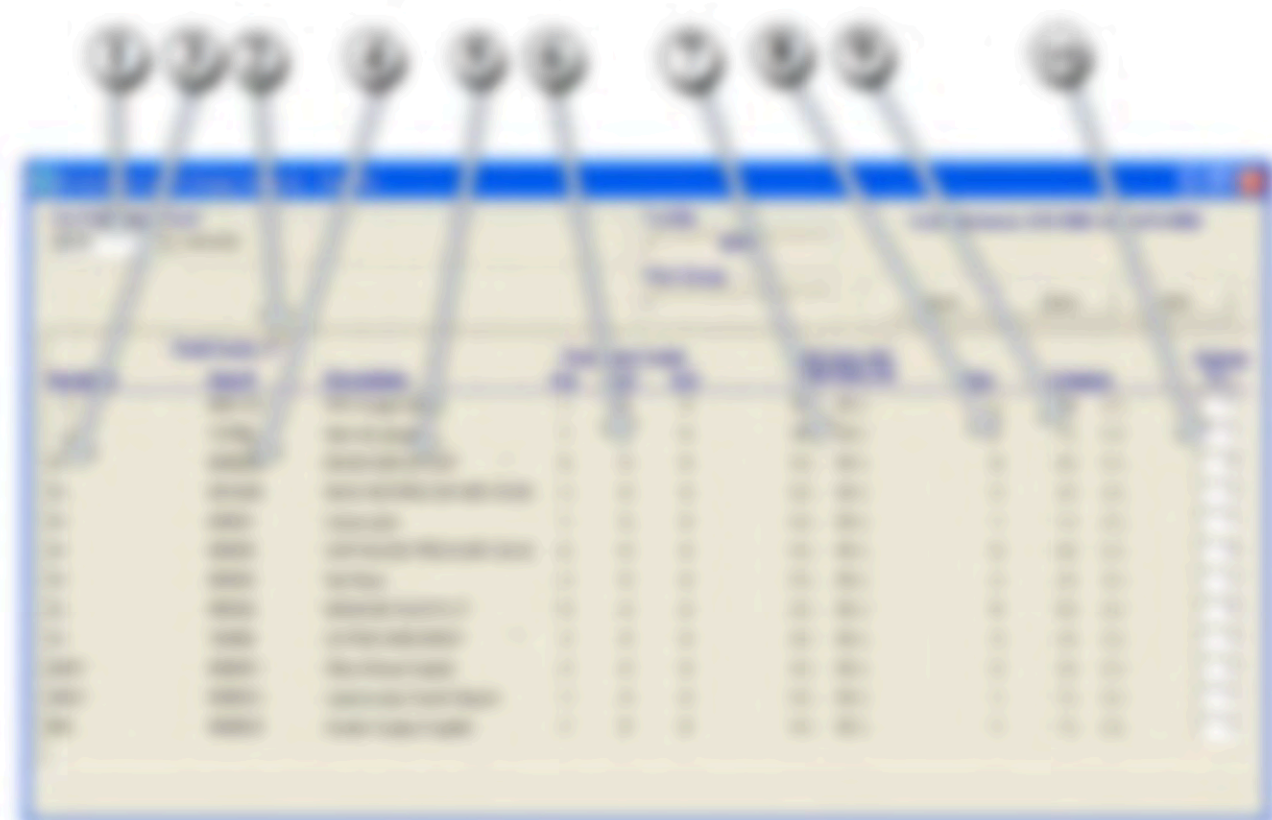
1. Select the range of preference cards you want to analyze.
2. Select the range of cards you want to analyze.

Note: You can select all preference cards for all card ranges by leaving all of the fields blank. Using this can take a long time to obtain results because of the potential number of items tested.

3. Click **Run**.
The Preference Card Image Analysis - Results screen appears with the list of supply items from the preference cards used during the test as specified.
4. Change the quantities in the **Change Qty.** column as desired.
5. Select the boxes in the **Flag OK?** column as desired.
6. Click **Save** to save your changes.

Results Screen

The Preference Card Image Analysis - Results screen shows you an analysis of each preference card you selected, one at a time.



Reference Card Image Analysis

No.	Section/Field	Description
1	The Reference Card	To view a different card, select another card in the The Reference Card box.
2	Card Data	The number of cards this card was used for during the data range are specified: - The value in the box at the bottom of the screen are for each card in the preference card. - The values in the box at the bottom of the screen contains the number and analysis for each card. This table describes the analysis.
3	Analysis	Analysis that the data items were used.

No.	Column/Field	Description
1	Item ID	Item identifier from the Stock dictionary
2	Description	Item description from the Stock dictionary
3	Part Count Type In In In In In	These columns show the quantity of each item in the preference card for the supplier, the first assembly, and the second assembly
4	Part Count by Sub Item ID	The number of assemblies whose supply usage differs from the number in the card. The figure is 1 in the absence of such assemblies in which the number differs
5	Qty	The number of items actually used divided by the number of units
6	Amount	The total purchase amount. The number of units in which the total purchase amount appears is in parentheses
7	Change to	Set the number in the box to change the quantity shown in the preference card

Preference Card Inactive Stock Reports

Menu Reports > Preference Card Inactive Stock

MR Manager's Preference Card Inactive Stock Report lets you see what supplies in Materials Management are inactive. This is a valuable tool for reducing your preference cards as to date. After you see what stock is inactive, you can quickly update the preference cards using the Manage Preference Cards screen.

See the MR Manager Configuration Guide: Manage Preference Cards.

Sample > Preference Card Inactive Stock Report

1. Menu Reports > Preference Card Inactive Stock

Reports

Q&A Turnaround Statistics

The screen for specifying a Performance Chart (machine chart) listing appears in the default form, which allows you to specify performance goals.

1. Choose a method to **Select By**:

- **Performance Chart**: Specifies a report of the machine chart on each performance unit in the range that you define.
- **Machine Chart**: The option specifies instructions for machine chart. The screen lists the form shown in the next graphic. **Starts** is the report starting by shift number, and **Shift Summary** summarizes the data per group. Choosing **Shift Summary** results in a report that shows one line per shift, with each line including the shift number, if applicable. When **Shift Summary** is chosen, the report has a section for each shift, and a line for each unit operated in the section.

2. Select a range of performance units, or select an inventory and range of stock in it that you want to report on.

3. Click **OK**.

Your report appears listing the machine chart, according to your performance units. The following graphic shows machine chart in a summary listing.

Q&A Turnaround Statistics

Main Reports - Q&A Turnaround Statistics

The Q&A Turnaround Statistics Report allows you to see average turnaround times between units. Turnaround time is defined as the elapsed time from the start of a unit (from Start Time) until the start of the next unit (the Time Stop Time) in the same operating unit. Time start and end time values are defined in the Basic Information. Start Time and Stop Time fields in the Case Record Field Mapping Dictionary.

Access to Q&A Turnaround Statistics Report

1. Select Reports -> Turnaround Statistics.

The Q&A Turnaround screen opens.

2. Select date ranges, time ranges, and days of the week for which you want to run the report.

3. Clicked on Select Range and Turnaround Time

4. Clicked on Enter a number of minutes to Exclude turnaround times greater than

5. Select the data you want to report on your report.

- **Period:** Choose how you want your report broken down. **Period Summary** creates report data from the chosen time period into days of the week - Monday's Data, Tuesday's Data, etc.
- **Choose the Facilities, Rooms, and/or Room Groups** combination you want to see in the report.

Note: The total number of beds can't be less than one bed.

- After choosing the data you want to appear in your report, click **Print**.
- Your DR Transparency Statistics Report prints.

Report Statistics

The following statistics appear in your DR Transparency Statistics Report:

- **Average Time:** The average time between visits within each week.
- **SD - Standard Deviation:** The number under SD represents variance. It tells you the degree to which each value in a list varies from the mean of all values in the list. The smaller the standard deviation, the less each value varies from the mean.

Cost Analysis Report

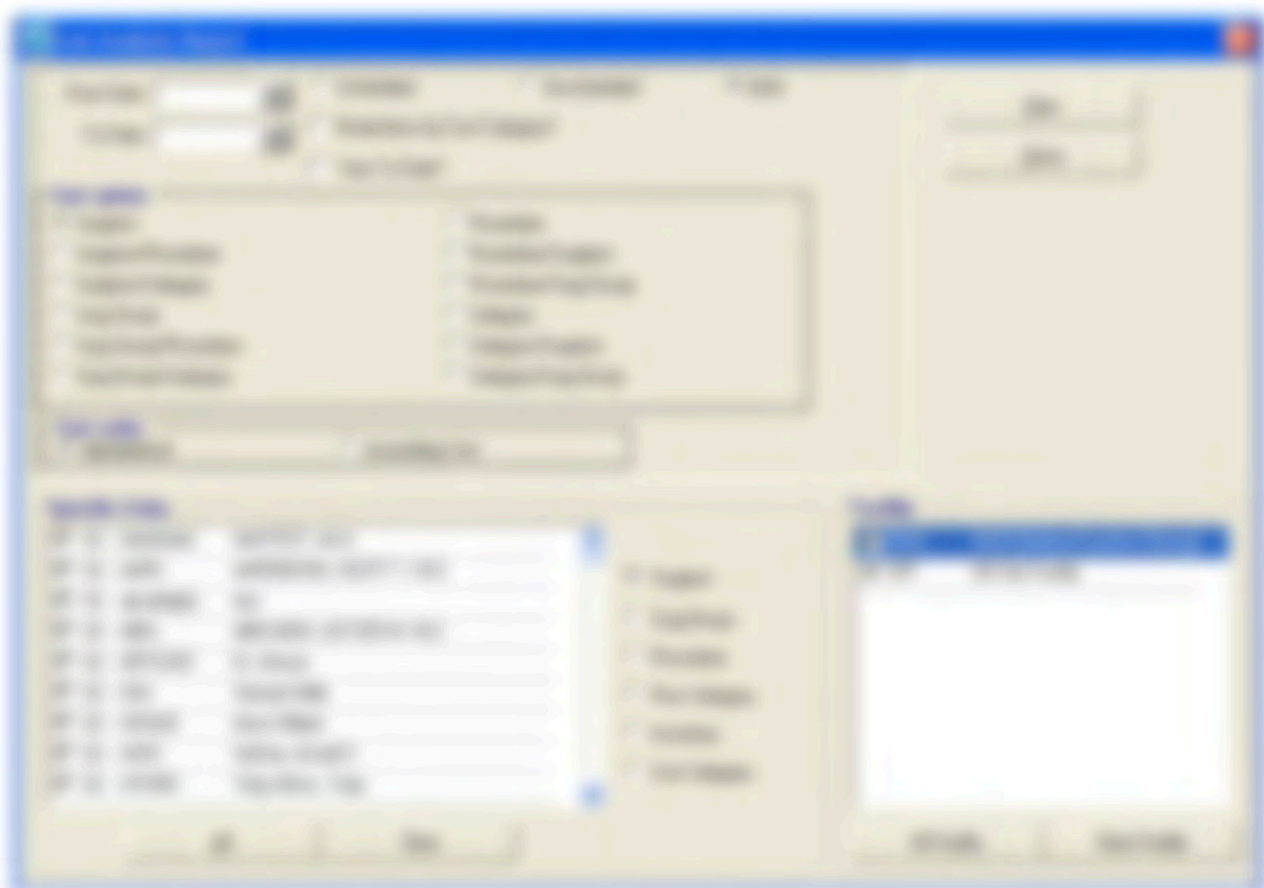
Menu Reports > Cost Analysis

The DR Manager Cost Analysis Reports allow you to see a breakdown of DR costs by a variety of criteria. Statistics for these reports come from data records stored in a PostgreSQL database. This report includes complex queries, which are saved with their own unique ID numbers or identifiers.

Overview of Cost Analysis Report

1. Menu Reports > Cost Analysis

The Cost Analysis Report screen appears.



- a. Choose the information you want included on your report.
 - **Breakdown by Cost Category.** Select to add or use the report cost categories on the report. For example, if you select by budget, the report shows the budget's value and a summary line for each cost category.
 - **Start to End.** The date and time defaults 1 through report report date specified in the Report to Date. You can also select an upper/lower date range specified.
 - **Included/Not Included.** Inclusion/Not included are added to a specific meeting. Inclusion/Not included are not added to meetings.
 - **Sort Order.** Select how you want your report sorted.
 - **Specific Entry.** The Specific Entry cost changes according to the Specific Entry you select. Select items you want included on your report.
- b. Use the add buttons and the check boxes in the window at the bottom of the screen to select the set of data that you want to report on. You can choose the data to be included in the report from any combination of Budgets, Budget Groups, Procedures, Procedure Categories, Cost Categories, and Meetings.

Conflict Override Report

Menu Reports > Conflict Override Report

The Conflict Override Report gives you a list of all existing conflicts that were overridden during a specified time period. The report includes the following:

- Date, Time, Procedure, Surgeon and Room involved in the conflict that was overridden.
- The nature of the conflict, such as the surgeon not being authorized for the procedure in the room was chosen.
- The comments of the user who overrode the conflict.

Conflict Override Screen

You use the Conflict Override screen to enter or select the following:

- The date range for which you want to see conflicts.
- The facilities for which you want to see conflicts.
- The sort order. The default is to sort the report by user comments, but you have the option of sorting by conflict type.

Report

Click **Print** on the Conflict Override screen to print the report.

Insight Expiration Screen

You use the Insight Expiration screen to enter or select the following:

- The date range for the expirations you want to add.
- The unit code. The default is by expiration date only, but you can also select by expiration date and item code.
- The inventory to search for expiring insight items.

The screenshot shows the 'Insight Expiration Report' dialog box. It includes the following elements:

- Expiration Date:** Two date pickers labeled 'From' and 'To', with 'OK' and 'Cancel' buttons to the right.
- Unit Code:** Two radio buttons. The first is 'Expiration Date' (which is selected) and the second is 'Expiration Date/Item Code'.
- Inventory:** A table with two columns: 'Inventory' and 'Expiration'. It lists several items with checkboxes in the 'Expiration' column.

Inventory	Expiration
Item 1	☐
Item 2	☐
Item 3	☐
Item 4	☐
Item 5	☐
Item 6	☐
- Buttons:** At the bottom, there are two buttons: 'All Inventory' and 'No Inventory'.

Report

Once ready, the Insight Expiration screen is used to print the report. The graphic below shows most of the report, with scrolling to the right-hand side report area showing details related to the first item.



Component	Description	Serial Number	Part Number	Quantity
Processor	Intel Core i7-4790K	0000000000000000	0000000000000000	1
Memory	8GB DDR4	0000000000000000	0000000000000000	1
Storage	1TB HDD	0000000000000000	0000000000000000	1
Optical Drive	Blu-ray/DVD	0000000000000000	0000000000000000	1
Network	10Gb Ethernet	0000000000000000	0000000000000000	1
Power Supply	600W	0000000000000000	0000000000000000	1
Cooling	Water Cooling	0000000000000000	0000000000000000	1

Inventory Change Report

Inventory Change Report

The Inventory Change Report tells you about the change of inventory items that you specify. The report shows information from the Inventory Database and data entered in the Inventory History.

The report includes the following:

- Serial Number, Inventory Description, Description Comment, Unit Number, Description Code, Purchase Price Number, Type and Number, Asset, Storage Temperature, Acquisition Date, Acquisition Code, and Initial Status
- The following fields show issue data: Original ID, Date, Type, Issue Number

Inventory Change Report Screen

You use the Inventory Change Report screen to specify the report by selecting the following. You do not have to specify all elements.

Reports

Inventory Image Report

- The Inventory Description that you want to add.
- The Lot Number you want to add.
- The Serial Number that you want to add.
- Image Identifier
- The Image URL that you want to add.
- The Image Type, which will be Image or not Image.
- In the Inventory list, you can check the image on the icon for the inventory that you want to report. All inventories allow you to select all of the inventories in the list, while other inventories restrict to any selected inventories.

Description List

Inventory	Description	Image
10000	Item 10000	☒
10001	Item 10001	☒
10002	Item 10002	☒
10003	Item 10003	☒
10004	Item 10004	☒
10005	Item 10005	☒

Add **Remove**

Reports

Accessing External Reports

To See This Report, Select Reports in the left-hand navigation pane.	External Reports
Bookings reports	Bookings Reports
Lead source reports	Lead Source Reports
Performance and reports	Performance and Reports

Note: The external view includes a "Select Facility" section listing the facilities to which you have access. If so, select the facility to which you want to view the report.

Accessing Storage Reports

Storage Reports for bookings and lead reports are all accessed from the various storage reports in the Tools menu. There are no Storage Reports for performance reports. Use the table to locate the type of external report that you want to see.

External Report	From Select Tools > Storage	Storage Type
Bookings reports	Bookings	Bookings Schedules
Hot bookings reports	Hot-Source Bookings	Bookings Schedules
Lead source reports	Lead Reports	External Reports
Lead format reports	Lead Reports	Lead Data: Hot-Source External Report

View an External Report

To access the type of External Report you want, use the table in Accessing Storage Reports or the external view with the Accessing Storage Reports. The External Reports section appears listing the capabilities of Storage Reports that you can access from the path you want and as shown in Storage Storage.

- **Book** Select a report to print or the default printer. Select **Book** to begin the operation.
- **Export** Select a report to export or copy all data to file on the network. Select **Export** to begin the operation.
- **Refresh** Refresh the report you want to see. Then click **Refresh** to display the report.



External Report Screen Modes

- **Type selected:** Tells you the type of report.
- **Q - Quick Report**
- **Report of Report Report:** Select to report a copy of the report as a file on the network.

Run an External Report Group

The JCL Manager Configuration Guide describes how to configure groups of external reports and destinations that will receive them. To select an external report group and send it to the specified destinations, execute the following steps:

1. Select **Reports > External Report Group**.
2. In **Name**, select a group.
3. Click **Print** to run the group.

A

Appendix A: Perioperative Integration

Integration Overview

Workflows that use Procure Manager, Anesthesia Manager, and Patient Manager with OR Manager can take advantage of perioperative integration with Oracle as follows: In which data entered in one application appears in others. Integration is achieved through the exchange of dynamic data.

Dynamic data refers to data that users enter as they document a perioperative encounter for a particular patient, or data that is imported from an external system such as the HES. In general, it means that one application can display or edit elements of data in shared between these applications.

Patients located for surgery in OR Manager can be easily found in the Canvas screen in Anesthesia Manager or Patient Manager. (The OR Manager is particular tracking and patient data can be manually set at any time.)

Procure, Perioperative and Critical Care Workflow

The typical workflow for interaction with Procure applications in a perioperative encounter is as follows:

OR Manager is made a booking

Appendix A: Interoperable Integration

Data Flow Between Applications



As soon as a building or case record exists in OR Manager, the patient name appears on certain tabs in other modules: the Pres Manager and Anesthesia Manager, allowing the patient record to be opened in those modules.

If the patient has a building, the case record is started from the building. If the patient does not, the scenario is an emergency surgery, an patient case is started. When it is created, the case record represents the building for the purpose of identifying the patient across modules.

Occasionally, when a piece of anesthesia record is started independently or when a patient change indicator in OR Manager is not possible in an integrated module for technical reasons, the record can be linked to a building or case record later from the other module.

Data Flow Between Applications

Certain data is shared between linked records as follows:

- Between the building and the preoperative record
- Between the building and the anesthesia record
- Between the case record and the anesthesia record
- Between the preoperative record and the anesthesia record

Data flow for home medications, allergies, and procedures is always bidirectional; data flow for other types of data may be unidirectional or bidirectional, as described in the next section.

Note: Standard Shared Fields are defined by FHIR and their definition and use cannot be altered.

When a prescription is entered in Broadbase Manager, Policy Manager, or Clinical Case Manager, any other existing or new record becomes associated with the same encounter type as that of the prescription. Therefore, it can at the time, take place between the existing or new record and the prescription record as long as the template is not changed to one that belongs to another encounter type.

Example: A template can have several associated templates. These include "Broadbase" and "Policy". The first two are associated with the encounter type "OP" and the last with the encounter type "Policy". A patient is entered into a prescription using the "Policy" existing template. This continues to flow between records until the patient is transferred to the "Broadbase" template, but stops to flow when the patient is also transferred to the "Policy" template.

Caution: The same has not been done with comments. The interface in Broadbase Manager, Policy Manager, or Clinical Case Manager allows users but is to be entered that in the corresponding EM Storage interface.

For any comments that are shared between applications, an effort is shown in Broadbase Manager, Policy Manager, or Clinical Case Manager as well as entering any note that would give rise to creation of data in EM Storage.

Data Elements

The following types of data can be integrated shared:

- Allergies and procedures
- Broadbase Type

Note: Broadbase Type is documented as an event in Broadbase/Policy Manager.

- EM Type
- Demographic data (patient name, address, etc.)
- Diagnosis: ICD9, ICD10, and SNOMED

Note: The "SNOMED" diagnosis type exists in the "Clinical" category but not in EM Storage. When data is the type from a EM Storage & maps to the "Policy" type.

- Home Medications

Appendix A: Interoperative Integration

Introduction

- Medical Team: Anesthesia/Intensivist and Surgeon
- Workflow events: See Workflow Events on page 100

Note: Only workflow events with event type "Workflow Event" are shared.

- Procedures including any modifier procedures entered in the ICD Manager, including in case records

Note: Information entered in the ICD updates all applications. If the ICD user is Workflow, modifications and deletions entered in the ICD are reflected in ICD Manager, Procedure Manager, Anesthesia Manager, and PACS Manager.

See the Guide to Corporate Data Exchange.

The following tables show where data entered in different applications appears in an integrated system.

Data entered in an ICD Manager, including			
Item	ICD Manager	ICD Manager Flow Module	Anesthesia/PACS Manager
Diagnosis and interventions	Yes	Yes	Yes
Demographic data	Yes	Yes	Yes
Procedures - Prep	Yes	Yes	Yes
Event modifications	Yes	Yes	Yes
Medical Team: Anesthesia/Intensivist	Yes	Yes	Yes
Medical Team: Surgeon	Yes	Yes	Yes
Procedures	Yes	Yes	Yes

Data entered in Procedure Manager			
Item	ICD Manager Workflow Events	ICD Flow Module	ICD Procedures
Diagnosis and interventions	Yes	Yes	Yes

Appendix B: Integrative Integration Data Sources

Data contained in: Project Manager			
Item	PM Manager Working Folder	PM Team Folder	Integrative PM Manager
Workflows: Technical Process	No	No	No
Workflows: HR	No	No	No
Workflows: Project	No	No	No
Workflows: Project	No	No	No
Workflows: Project	No	No	No
Work: Initiatives	Yes, if the working is not linked to a task sheet	No	No
	No, if the working is linked to a task sheet		
Work: Team: Workflows/HR	No	No	No
Work: Team: Project	No	No	No
Workflows	No	No	No

Data contained in: PM Manager: Team Folder			
Item	PM Manager Working	Project Manager	Integrative PM Manager
Workflows and initiatives	No	No	No
Workflows: Team	No	No	No
HR: Team	No	No	No
Workflows: HR	No	No	No
Workflows: Project	No	No	No

Appendix A: Postoperative Integration

New Research

Data entered in an OR Manager Case Record			
Item	OR Manager Booking	Price Manager	Appointment Price Manager
Operative - Flap	Yes	Yes	Yes
Room indications	Yes	Yes	Yes
Medical Team - Anesthesiologist	Yes	Yes	Yes
Medical Team - Surgeon	Yes	Yes	Yes
Medication events	Yes	Yes	Yes
Procedures	Yes	Yes	Yes

Data entered in AppointmentPrice Manager			
Item	OR Manager Booking	Price Manager	AP Manager
Manager and procedures	Yes	Yes	Yes
Anesthesiologist apt	Yes	Yes	Yes
Surgeon apt	Yes	Yes	Yes
Perioperative apt	Yes	Yes	Yes
Operative - Flap	Yes	Yes	Yes
Operative - Flap	Yes	Yes	Yes
Operative - Surgeon	Yes	Yes	Yes
Room indications	Yes, if the booking is not linked to a case record No, if the booking is linked to a case record	Yes	Yes

Data entered in HealthStream/Philo Manager			
Item	PH Manager Routing	PH Manager	PH Manager PHL
Medical Team - HealthStream/Philo - HealthStream Routing - HealthStream/PHL - HealthStream/PHL - PHL - PHL/PHL	No	No	No
Medical Team Project	No	No	No
Medical team	No	No	No
Procedure HealthStream procedure only	No	No	No

Concurrency

The PH information screen, imported from HealthStream Manager, Philo Manager is Critical Care Manager. This can affect information an integration test is added to PH Manager. Changes are not reflected until the user closes and reopens the screen.

If you want to change the same integration test at the same time from HealthStream Manager, Philo Manager is Critical Care Manager, and another user from PH Manager, the PH information screen reflects the updates and displays a message to the user to verify whether or not they want to continue with the update.

For example, Philo has a test of value of 1000. This test is a routing test test.

- Step 1: User opens the PH information screen in HealthStream Manager, Philo Manager or Critical Care Manager.
- Step 2: User updates the test and Philo updates with the value value 1000.
- Step 3: User opens PH Manager and adds the routing test to the address of 1000.
- Step 4: PH updates the routing test where test is a routing.

Appendix B. Perspective Integration

Integrated Fields

1. Field *it* appears there with its original value *happy*.
2. *it* changes the value of Field *it* to *happy* and clicks **OK** to save.
3. *it* will save *happy* as the value and changes the value of Field *it* to *happy* and clicks **OK** to save changes.
4. A message flashes telling *it* that Field *it* has been modified from *happy* to *happy* and asks the user for confirmation before setting the value to *happy*.
5. If *it* answers **Yes**, the new value of Field *it* will be *happy*. If *it* answers **No**, the current value of Field *it* remains *happy*.

Note: Now *it* also should not use these fields for anything other than integrated fields, as they are already designated as part of the "CRM" namespace through the old records "CRM" as they exist in the future.

Integrated Fields

Integrated Fields are shared fields that also define for themselves. For example, the definition: *happy* *it*.

The CRM information screen, accessed from Broadbase Manager, Policy Manager or Critical Case Manager, does not affect otherwise an integrated field is added to CRM Manager. Changes are not reflected until the user clicks and to open the screen.

it can also be to change the same integrated field as the same time from Broadbase Manager, Policy Manager or Critical Case Manager, and another one from CRM Manager. The last saved value is stored.

For example, Field *it* has a value of *happy*. This field is a leading level field.

1. User 1 will open the "CRM information" screen in Broadbase Manager, Policy Manager or Critical Case Manager.
2. *it* shows the "Information" tab and Field *it* appears with the initial value *happy*.
3. User 2 will open CRM Manager and adds the leading number to the address *it* is adding.
4. *it* opens the leading form where Field *it* is located.
5. Field *it* appears there with its original value *happy*.
6. *it* changes the value of Field *it* to *happy* and clicks **OK** to save.
7. *it* will save *happy* as the value and changes the value of Field *it* to *happy* and clicks **OK** to save changes.

Note: *it* will not use the updated value of *happy* and they click and open the screen.

Appendix B: Participative Integration

Changing the Patient using OR Manager

6. Note that users should not use these fields for creating other than integrated fields, as they are already designated as part of the "OR" integration about the site become "OR" at any point in the future.

Note: Integrated fields can not be used with the standalone Incentives Manager application.

Changing the Patient using OR Manager

It is possible to change the patient in a booking or case record in OR Manager. The change affects any linked records the patient has in other First Participative and linked data modules such as Time Manager, Incentives Manager and Policy Manager with certain exceptions. Details are on the records created in these modules in records in OR Manager.

- A patient change would be necessary in the following situations:
 - The patient name and/or medical record number in the booking is incorrect.
 - The account number in the case record is incorrect.
 - The case record was started for the wrong booking.
 - An add-on case for an emergency patient was started with a temporary name and identifier and the patient has since been identified.

If a case record has not yet been started, any change to the patient in the booking affects records in Time Manager and Incentives Manager.

After a case record is created, any change of patient must be performed in the case record in order to update the records in the other modules. A patient change in the booking would have no effect on the other modules.

Following a patient change in a booking or case record, users of Incentives Manager and Time Manager must observe the following behavior:

Appendix A: Postoperative Integration

Changing the Patient Using ICD Manager

Step	Task
1. Select the patient in the system in the ICD Manager.	The system will display a message notifying the user of the change and that update and user record automatically. After the change, the spreadsheet record will display the three records and indicate changes in the configuration of the patient that will be not because the system restores the default configuration after changing the patient.
2. The message is displayed and the user can click the message and click on the ICD Manager.	The next time a user attempts any action in the system, the system will inform her that a change has been made and prompt her to update the list. By acknowledging the message, the user updates the list. The updated version list will then show the post-change patient name.
3. The message is updated after the patient change.	The system list will display the postchange patient name.

The ICD Manager in Healthcare Manager and Patient Manager contains an entry notifying the change and informing the Patient ID of the previous patient. Internally, the audit trail will include an entry for the patient change.

Considerations

When changing the patient in ICD Manager, you should be aware that patient-specific data in the spreadsheet record will be transferred to the data for the second patient. Before changing a patient, you should review the record to make sure that it does not contain data corresponding to the second patient.

For example, you have a case record for 6. Thomas with a linked spreadsheet record for the correct patient is 7. Click the Thomas record contains an alias that points to 7. Click you

Appendix B: Postoperative Integration

Changing the Patient using IIF Manager

change the patient in the case record, the change is not because patient data from the IIF to IIF. Each encounter has patient data to B. The end.

Patient-specific data, such as allergies and procedures, entered in Proxy Manager and Workflow Manager may be lost if a patient change is performed in IIF Manager using patient data from the IIF. To avoid this, this document is adding allergy and procedure information only in the IIF to avoid problems with data synchronization.

Action	Result
Encounter started for P. added from the IIF	Patient-specific data is imported from the IIF into the meeting.
Case record started for L. added from the IIF	Patient-specific data, including a Procedure allergy, is imported from the IIF into the case record.
An evaluation is started in Proxy Manager for L. added from the case record and a case allergy is added to the proxy evaluation.	The proxy evaluation shares data with the case record. Both the case record and the proxy evaluation now have allergies, Procedure and case.
The patient is changed in the meeting from P. added to L. added.	The meeting sends the IIF patient data for L. added to the proxy evaluation. Only the Procedure allergy, the case allergy is not.
Encounter, add any allergy in the case record and send the record. This sends the allergy.	The system will send all allergy information from the case record to the proxy evaluation again, synchronizing the records.

Restrictions

In certain cases, other modules will reject a patient change in order to maintain data integrity in meeting records. When this happens, IIF Manager displays the following message:

This change does not affect any linked records in other Proxy Postoperative and Clinical Care applications.

Do you want to proceed?

If you click **Yes**, the patient changes only in the meeting or case record records in the other modules continue to use the original patient name and data entered in case record do not flow to the other. If you click **No**, the patient change does not occur in any module.

Other modules are unable to comply with patient changes in the following situations:

- The second patient has an open admission in another module and that admission contains data from an earlier encounter. For example, Workflow Manager would be unable to comply if the second patient's Proxy admission included an earlier day of the IIF.

Appendix B: Interoperable Integration

Changing the Patient Using IIF Manager

- The other module contains records for this addressable to both the original and second patient and these addresses overlap.

Example

In unidirectional integration, patient 1 has access to records. The patients are same in Reference Guide and the test is open. First addressable test is currently in records.

An addressable test is started under the name 1. This will be a temporary patient ID.

A record is started in Healthcare Manager for 1. This

also triggers the patient's associated record is transferred when the patient record

When 1. This address in the IIF file you try to change the patient in the case record in Reference Guide. The system returns the open. First addressable in Reference Guide and informs you that the change. If correct not, all not trigger a corresponding patient change in the associated record ID 1. This

What would happen if you changed Reference Guide and that the change patient again? The change would all be reported because 1. That's First addressable contains some overlap with the addressable in Reference Guide. (The system cannot reconcile the two sets of data in the open this period.)

- The test address the record in IIF Manager and the record in the other module was created separately from the other module before the patient change attempt.
 - For example, a record was started in Healthcare Manager and then linked to a tracking and try to change the patient in the tracking.

In these cases, you are presented with the change in IIF Manager but the corresponding records in the other module will not follow after the change. The records will no longer share data.

In other cases, a patient change in IIF Manager will not be detected by the other module:

- You change the patient in the tracking after a case record was started. After a case record is created, the case record carries the patient identity in the integrated system. Changing the patient in the tracking would cause the test address the tracking and the other records. If a patient change must be reflected in both the tracking and the case record, you should perform the action separately in both records. Only the change in the case record will affect the other module.
- The name is tracking that is linked to an open record in another module and you attempt link a case record to that tracking.
 - For example, a record was started in IIF Manager and then Healthcare Manager linked as a tracking in IIF Manager. You start an addressable for the same patient and then link that case record to the tracking. The case record will be linked in the tracking but the rest of the records in IIF Manager and Healthcare Manager.

In these situations, you may be able to add to the record in IIF Manager manually, but by using the Link Record command in the File menu in Frontbase Manager, IIF Manager or IIF Manager Lite Manager.

Troubleshooting Frequently Asked Questions

Q I created a new record by right-clicking a building in the IIF Schedule View. Why don't I see the new patient name on the schedule grid?

A Changing the patient in the case record does not affect the building. If you want to see the changed patient name on the grid, you must edit the building separately.

Q I changed the patient in a building at the same time as I had a record for the same patient open in Frontbase Manager. Why didn't the patient change in the record in Frontbase Manager?

A All a case record sees is IIF Manager before you changed the patient in the building?

If yes, repeat the patient change in the case record and it will change in Frontbase Manager.

If not, all you need the record in Frontbase Manager under the name of the current patient before you changed the building to show the same patient? You can use the spreadsheet record in the case record by using the Link Record command in the File menu.

Q I have an spreadsheet record that is linked to a building. If I had a case record the building, will the case record and the spreadsheet record share data?

A No. The record have to enter data for overlapping fields in both records.

Q I changed the patient in a case record. When I look at the patient's record in Frontbase Manager, I see that the diagnosis and procedures I entered before the change are gone.

A When performing the change, you selected a patient that already existed in the system. The patient record deleted the patient data from this record. If the data you entered in Frontbase Manager before the change is still for the patient whose name is now in the record, you must enter it again.

Q I want to change the patient in a case record to a new patient in the system. I can't find a New Patient button in the screen.

A You can only create a new patient after changing the patient in a building. If the case record hasn't been opened yet, you can also choose to create the entire patient using changes, change the patient in the building and then create the case record.

Q I changed the patient in Frontbase. Why don't I see the change in the record I have open in Frontbase Manager?

A The change won't appear in Frontbase Manager until you create a case record.

Q I picked the wrong building when creating the case record chosen instead of Smith. For example, I want to change the patient in the case record to Smith but I have with records for the real patient open in Front Manager. What will happen to this patient's data?



Appendix B: Postoperative Integration

Changing the Patient Using CRM Manager

If Patient changes in CRM Manager affect all linked records in Proxy Management and Clinical Data, therefore the preoperative record for patient device will be transferred to patient device. You can correct the situation manually as follows:

1. Change the patient in the case record from device to device.
2. Open Proxy Manager and print the summary for patient device preoperative evaluation case under the name of patient device.
3. Review the data for accuracy.
4. Delete all data in the Proxy Manager record that does not apply to the patient device.
5. Start a new preoperative record for patient device.

B

Appendix B: Theatre Manager for UK Sites Only

Overview

Theatre Manager is the UK version of UK Manager. The differences in functionality are as follows:

- UK terminology has been replaced by UK terminology. See [Terminology Differences at the end of page 200](#).
- Book Time selling has enhancements. See [Book Time Selling at page 200](#).
- **Bookings**
 - Booking a segment in a booking is optional.
 - Bookings include a Consultant and Consultant Description field.
 - In Search and Results, a Book Description is present.
 - Booking Audit Trails include Consultant information.See [Bookings at page 200](#).
- **Case Records**
 - A Consultant Segment Field is included in Case Records.
 - Case Record Field Mapping includes Consultant fields.
 - The Consultant field and Consultant Description field in cases is optional.See [Case Records at page 200](#).
- Consultant Marks may be checked for profiles. See [Creating Profiles for Consultant Marks at page 200](#).

- **Custom Properties:** These include Consultant and Consultant Description information. See *Custom Properties* on page 303.
- **Custom Workbooks:** These include Consultant and Consultant Description information. See *Custom Workbooks* on page 303.
- **Storage Buckets:**
 - Information for Consultant, Consultant Description, and Qualification Reason are visible in Storage Buckets records.
 - Consultant Budget is a search parameter and information in Storage Buckets.
 See *Storage Buckets* on page 303.
- **Storage Case Records:**
 - Information for Consultant and Consultant Description are visible in Storage Case Records records.
 - Consultant is a search parameter and information in Storage Storage Case Records.
 - Not all cases include a field for a consultant.
 See *Storage Case Records* on page 303.
- **Web Services:** Troubleshooting displays the Web number in all screens and provides that same pattern URL. See *Web Services* on page 303.
- **Reports:** The following reports include consultant information:
 - *Troubleshooting Report*
 - *Basic Case Monthly Schedule Report*
 - *Detailed Case Monthly Schedule Report*
 - *Consultant Buckets Report*
 - *System Case Information Report*
 - *Basic Consultant Overview Report*
 - *System Information Report* also shows ranges in green.
 - *Consultant Average Case Length Report*
- The *Schedule Report* allows you to select Consultant and Consultant Description selection. See *Schedule Report* on page 303.
- The *Workgroup* table format is used for display and data entry.
- Addresses can include the County field and all postal codes.

Terminology Differences

The following table shows differences in terminology.

Appendix B: Teacher Manager for 20th Week Only

Continuing Information

20th Week	20th Week
Week	Week
Week Number	Week
Weekdays	Weekdays
Weekend	Weekend
Year	Year
Month	Month
Day	Day
Time	Time
Location	Location
Room	Room
Teacher	Teacher
Student	Student
Parent	Parent
Staff	Staff
Community	Community
Business	Business
Government	Government
Health	Health
Education	Education
Environment	Environment
Transportation	Transportation
Recreation	Recreation
Arts & Culture	Arts & Culture
Religion	Religion
Science	Science
History	History
Geography	Geography
Mathematics	Mathematics
Language Arts	Language Arts
Foreign Languages	Foreign Languages
Physical Education	Physical Education
Music	Music
Drama	Drama
Dance	Dance
Visual Arts	Visual Arts
Writing	Writing
Reading	Reading
Research	Research

8 Appendix B: Theater Manager for CM Sites Only

Block Time Screen

Block time has been updated to reflect all items.

Block Time Screen

The Block Time screen has additional fields:

- **Primary Consultant**
- **Region**
- **Consultant Headline/Category**
- **Headline/Category**

The Block Time has two additional radio buttons:

- **Consultant Region**

Bookings

The Booking screen has additional fields:

- **Consultant Headline/Category**
- **Consultant**

A consultant must be selected when creating a booking. The entity of a consultant is optional. If the user does not make an entry, available *Headline/Category* defaults provide a value. If *Headline/Category* defaults cannot provide a value, the booking can be saved with the field blank.

Block Description in Search List Results

The Search List will appear as a result of using Theater List method on the **Bookings**. Creating the search creates a table list from which you can select a row. Block Description appears in the table list.

- **Consultant Headline/Category**

Booking Audit Trail

The audit trail for bookings shows the following information:

- **Consultant Region**

Case Records

The Case Record includes an additional field:

- Consultant Budget

A case cannot be saved without a value in the Consultant Budget field. By default, the value in the Consultant Budget field is the value in the Consultant Budget field in the associated booking.

Active Cases

The Active Cases screen has an additional tab:

- Consultant

Field Mapping

Consultant Allocation From and Consultant Allocation To show appear in the Case Record Field Mapping screen.

Case Record Audit Trails

The audit trails for cases show changes in the Consultant field and changes in the Consultant Description field.

Conflict Checking for Consultant Booking

Books can be created with consultants. Conflict checking can identify the selection of a consultant who is not the consultant for the book. Such a conflict may be overridden.

Custom Profiles

The Custom Profiles screen may be configured to show either or both of the Consultant fields:

- Consultant name only
- Consultant description

8 Appendix B: Theater Manager for CM Sites Only

Custom Worksheet

Alternatively, the theater may be configured to show either or both of the Consultant Worksheet tabs:

- ▶ Consultant Worksheet Worksheet
- ▶ Consultant Worksheet Description

Custom Worksheet

The Custom Worksheet may be configured to show either or both of the Consultant tabs:

- ▶ Consultant Worksheet
- ▶ Consultant Description

Alternatively, the Worksheet may be configured to show either or both of the Consultant Worksheet tabs:

- ▶ Consultant Worksheet Worksheet
- ▶ Consultant Worksheet Description

Storage Bookings

The Consultant Suggester can be selected as a search term in Storage Bookings.

The steps for Consultant, Consultant Worksheet, and Qualification Review are visible in the Storage Bookings screen:

- ▶ New Audit Trip
- ▶ New Booking
- ▶ Review
- ▶ Worksheet
- ▶ New Booking

Storage Case Records

The Consultant can be selected as a search term in Storage Case Records.

Appendix B: Theater Manager for iM Blue Only and iM2

The values for Consultation and Consultation Description are visible in the Manage Case Record screen:

- Accounting History
- New Audit Trail
- Patient Audit Trail
- Print Case
- Displays the Standard Case Record Workflow is loaded

MRG Number

Theater Manager displays the MRG number on any screen where patient data appears. The MRG number also appears in any certificate that contain patient data.

You can search for patients in Theater Manager using the MRG number on Description Case Records, Add or Case Records, and Transfer Add or Case. Searching on patient MRG number entries are allowed in these screens. To maximize the search string, "00" will display results with all MRG Numbers starting with "00". However, searching in Holdings Report searching on the last MRG number.

Reports

Theater Schedule Reports

The Consultation field appears in the Criteria Selection screen and the Report Output:

- Criteria Selection screen
 - Select Consultation field
 - Consultation field
 - Consultation Criteria Selection
- Report Output
 - Consultation Description is in Output
 - Consultation Description Description is in Output

Basic Daily/Weekly Schedule Report

The Consultation field appears in the Criteria Selection screen and the Report Output:

- **Online Selection screen**
 - By Connection report option
 - Connection can further break down report
 - Connection is in Selection Options
- **Report Output**
 - Connection is in Output

Selected Daily Monthly Schedule Report

The Connection field appears in the Online Selection screen and the Report Output

- **Online Selection screen**
 - By Connection report option
 - Connection can further break down report
 - Connection is in Selection Options
- **Report Output**
 - Connection is in output

Cancelled Bookings Report

The Connection field appears in the Online Selection screen and the Report Output

- **Online Selection screen**
 - Connection Online Selection field
 - By Connection and
 - By Connection/Reason and
 - Not By Reason/Connection and
- **Report Output**
 - Connection is in By Reason/Booking Report
 - Connection is in By Booking/Reason Report
 - Connection Not Report
 - Connection/Reason report
 - Reason/Connection report

Session Time Utilization Report

The Connection field appears in the Online Selection screen and the Report Output

Online Selection screen

- Connection Output is in **Specific Session Type**
 - Connection Output is Not shown and default

Report Types

- [Connection Manager Report](#) (Connection Manager Report corresponds to the Connection Manager provided in the Reports section on

Conflict Overview Report

The following selections can be made for the Conflict Overview Report:

- [Connection](#) is in the report
- [Connection master conflict](#) appears in the report

Router Utilization Report

Theater Manager includes a Router Utilization Report. It is similar to the Router Utilization Report in iLL Manager. The Router Utilization Report may be displayed by selecting **Router Utilization** from the **Reports** menu.

The Router Utilization Report has three options for displaying personnel:

- [Selected connectivity](#)
- [Selected outputs](#)
- [Selected output group](#)

Average Case Length Report

A Connection Average Case Length Report is available from the **Reports** menu.

Schedule Viewer

The Schedule Viewer allows you to select the following:

- [Connection](#)
- [Connection description](#)

C

Appendix C: Supply Cabinet

Introduction

It states that using JDE Manager with Supply Cabinet functions. JDE Manager and the Supply Cabinet exchange messages to automatically document supplies that the Supply Cabinet is the supplier using JDE.

This chapter provides detailed instructions about using JDE Manager integrated with the Supply Cabinet. This integration will be called the interface in this chapter because an interface is software used to exchange messages.

This personnel help is set up the interface. The activities in this personnel are discussed in the following appendix in the JDE Manager Configuration Guide: Supply Cabinet Setup.

This chapter covers:

- Overview of the Supply Cabinet interface
- Supply Features for the Supply Cabinet
- Connecting to Supply Manager and JDE Manager

Overview of the Supply Cabinet Interface

The following steps describe the use of the interface:

Appendix C Supply Cabinet

Pusher Features for the Supply Cabinet

- The user creates a heading or an add-on code.
- The user performs an action that causes the interface to send a message to the supply cabinet, telling the supply cabinet that a custom tag has been submitted for approval. Messages sent from iLF Manager to the supply cabinet are called **outbound messages**. Outbound messages consist of information for a user or heading. Outbound messages are sent upon the following events:
 - Printing a profile** Printing a profile from iLF Manager sends outbound messages to the supply cabinet. A profile should be printed when an account number is assigned or when any change in information, such as structure or date of service. Printing a Standard profile activates an outbound message, but the profile does not show a unique number available to custom profiles that allow tracing the operations of the interface. Printing a customized tag will trigger the outbound supply receipt message to be sent. Printing a profile from iFlowTrace does not activate an outbound message. Information about profiles and attachments is also sent to the interface upon add in this document. See [Custom Profiles for the Supply Cabinet](#) below.
 - Sending an add-on code receipt** Sending an add-on code receipt sends an outbound supply message.
 - Sending a tag receipt** If an outbound supply message for a tag receipt has not been sent, sending the tag receipt sends such a message.
 - Changing a profile** Changing the profile in the tag receipt sends an outbound supply message. This function should be performed when an account number is assigned or changed.
- Supplies for the custom are pulled from the supply cabinet, returned to the supply cabinet, or written. iLF Manager automatically receives and sends messages from the supply cabinet about these transactions. Messages that the supply cabinet sends to iLF Manager are called **inbound messages**. Inbound messages consist of the effectiveness, return, or waste of supplies.
- Inbound messages are stored until the exception entry screen opens for the user or unit they are processed separately. Upon these events, the exception entry screen shows the supplies processed for the user, return, and error messages may be generated. Supplies are stored with the quantity sent to the interface or the quantity sent if no quantity has been sent. Supply generated uses the supplies processed and also corrections indicated by error messages. See [Exception Entry Screen](#), [Messages and Error Messages in the Interface](#) page.
- It is necessary to examine transactions involving the interface, as well that is available.

Pusher Features for the Supply Cabinet

It is necessary to create custom profiles for users that have the interface in order to display the Supply Cabinet check box. Standard profiles do not display the Supply Cabinet check box.

Custom profiles created for a heading or an add-on code receipt show the Supply Cabinet check box for each stock receipt as effectiveness between stock subject to supply cabinet processing and

stock not subject to interface processing. If the check box is selected, the stock in the record will be processed by the interface.

When a custom profile is entered for a handling of an add-on stock record, a unique identifying number is generated by the interface. This number can be made visible on the report. This number can be used in tracing the operations of the interface.

Responding to Supply Messages and Error Messages

When using the interface, you need to perform several tasks to make sure that supplies are correctly accounted for:

- Information about changes in supplies appears in the Exception Listing screen. It must be used as part of the normal audit procedure. See *Exception Listing Screen*.
- Error messages may occur. These are displayed from a menu selection in the Exception Listing screen. See *Error Messages on page 100*.
- Resolution of supply information may be required for completed issues. See *Completed Issues on page 100*.

Exception Listing

IBM Storage Management Console displays messages when the exception listing screen is opened. If the exception listing screen is opened at the end of a shift, messages are not processed. No new messages are processed until the Exception Listing screen is open. The new messages will be processed when the Exception Listing screen is reopened.

See *IBM Storage Console: IBM Storage Management Console*, 100 for general information on exception listing. This section describes features added to the interface.

If IBM Storage Management Console messages result in updates, the Exception Listing screen displays a message for the listing of changes.

During the changes to part of the work flow for the interface that helps to ensure that all supplies are accounted for. During the changes display from the audit procedure as performed by the current user.

The following table helps in understanding the Exception Listing screen if it is displayed with the interface by listing its visual features and by describing how it represents data.

Appendix C Supply Catalog

Responding to Supply Manager and Off Manager

Feature	Description: Supply Manager Response
Item update	When a supply catalog message is sent, processing checks whether the item exists in the description listing screen with the Supply Catalog indicator selected. If there is an exact match, the item item is updated.
Item list	A new item is added if the item does not exist in the Supply catalog or if the item cannot be updated by the interface. A new item is added if the conditions for item update do not apply. These conditions are described in the preceding entry in this table.
Supply Catalog Item list	Each item in the screen has a non-selectable Supply Catalog check box used to sign-in/out. If the check box is selected, it indicates a supply that the interface can update.
Collapsible Item	Two items that have the same item number in the description listing screen are identified as items updated by the interface and the other identified as item that is not updated by the interface, all collapse together.
Merging Item	Two items that have the same item number in the description listing screen are identified as items updated by the interface and the other identified as item that is not updated by the interface, all not merge.
Off Manager	Off Manager cannot be updated by messages from the supply catalog even if it is in a Supply Catalog section in the interface app. The item Off Manager cannot be updated by messages from Off Manager.
Product	Products that are mentioned in the messages sent by the supply catalog are included in Off Manager screen items if both the numbers and name numbers match or if either type of number is in the messages. In other cases, it will not appear in the Description Listing screen.
Tag/Photo/Video	Tag/Photo/Video and Tag/Photo/Video screen items cannot be updated by messages from the supply catalog and will have items from a selected Supply Catalog Item list.
Item list	Item list is not included in messages from the supply catalog. Off Manager will update the item list that is list in the list in the Description Listing screen if you click in the only difference between supplies that appear items in the Description Listing screen.

Appendix C: Supply Catalog

Responding to Supply Manager and Order Manager

Feature	Description: Supply Manager Response
Selected Item	If an item is selected into the Description History window and is set as a supply-related item, a user with permissions can update the item. If an item is added into a user's cart, the user can see that the item has not updated and view the item that the item has not updated. The user of the system can also view the item that is added into the Description History window. Responding to Description History shows that the supply-related and non-supply-related items, and the user must select the supply-related quantity if permissions allow. If only a supply-related item shows in a window, the user can add quantity immediately if permissions allow.
Responding to Item Operations	Responding to a preference and is possible. Responding to a preference and item operation shows that the user can select the item that the Description History window. The user can select the item that is added into the system. Responding to a preference and is not available.
Responding to Item Operations	If the supply-related item is a supply for a user that is not supported in the system, the user can select the item that is added into the system. If the user can select the item that is added into the system, the user can select the item that is added into the system.

The Description History window is used to respond to a user who has selected a supply-related item into the Description History window. A selected item in the window indicates a supply that the item has not updated.

The system window in the Description History window is responsive for any item that shows a selected supply-related item into the system. The user can select the item that is added into the system.

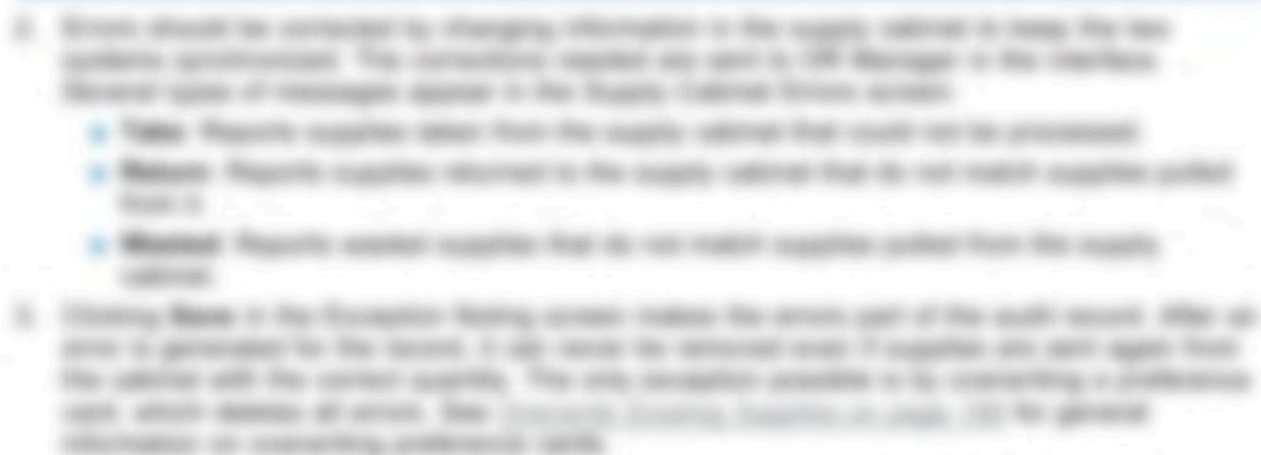
The information that a user can add to a description history is limited by permissions and by permissions. Permission is needed to select and to add quantity, or number, or a user number to a supply-related item.

Error Messages

Error messages show that information sent to the supply-related or Order Manager that could not be processed or updated in the Description History window.

How and Where to View Error Messages

- The user can view error messages by selecting the Supply Catalog Error in the right-hand menu in the Description History window, as shown in the following graphic. The menu selection appears only when error messages exist. The user must be able to select the menu in the window to display the error messages.



Completed Cases

Supply supply information in the Description Detail screen and displaying with error messages for non-completed cases are both supported in the upcoming sections. These tasks may also be needed for completed cases. Performing these tasks for completed cases requires identifying the cases that need work and opening the cases, as explained in the next section. Administrators grant permissions for opening completed cases.

These requirements support evaluation of completed cases to avoid a backlog of unprocessed supplies and to ensure the accuracy of the Performance Case Stage Report and the Case Analysis Report.

Search and Open Completed Cases

You can set a completed cases status to investigate in order to process supplies, as described earlier in this chapter. The following steps explain how to work on completed cases without making any status change.

1. If a completed case has unprocessed supply messages, a message appears at the bottom of the Description Detail screen.
2. To process unprocessed supply messages for completed cases, select **Tools > Process Supply Catalog Data**.

The Process Supply Catalog Data screen appears. In the following graphic, the set status points to the description ID, which indicates that the screen allows you to specify only completed cases.

3. Enter selection values for the completed cases to search for. Enter search specifications in the same manner that you would in searching for other case details. Search for Case ID number 1000000000.
4. Click the **Refreshable** button.



The Process Supply Catalog Data screen appears with the cases that you specified. Select one set row.

5. Optionally, click the **Select Columns to Display** icon to reconfigure which columns and the order in which they are displayed.
6. Specify the case you want to work with selecting its check box. Three options are available:
 - **New Unprocessed Supplies** Displays a report screen that lists unprocessed supplies.
 - **Process Supplies** The software performs the operations for completing a case, such as adding the supply information into the case unless there is an error. It displays about the case record that is being processed.

- **New Order:** Creates Supply Catalog Order record for the completed order. See (100, 100) Supply Order Messages at page 100.

D

Appendix D: Privacy Settings

Privacy Message

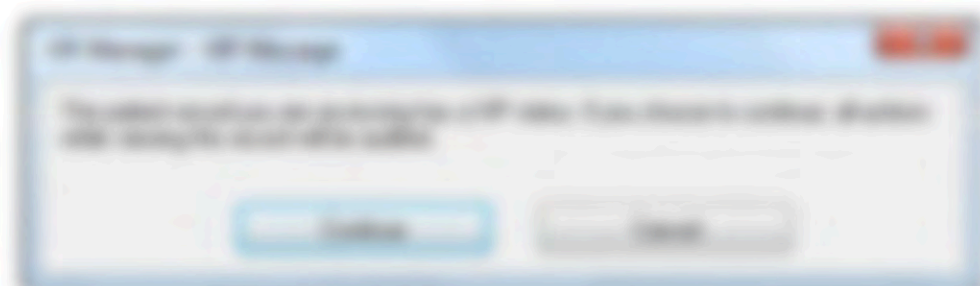
If a privacy message has been configured, users see the message when logging on. If the Privacy Message is enabled, a privacy message appears in the iVX Manager login screen. The message is configurable by the administrator. The message also appears on application launch.

This appendix discusses the behavior of the privacy features in iVX Manager. For more information, see the Security Manager user guide.

iVX Manager

If user can designate a desktop screen as having iVX status. If iVX functionality has been configured, a message such as the following is shown when these screens are accessed:

Note: The iVX screen displays only if a different user logs in after user login.



your Outlook to show the image and continue. The action creates an audit entry in the Outlook Access Audit Report. Selecting **Offline** terminates the action without creating an audit record.

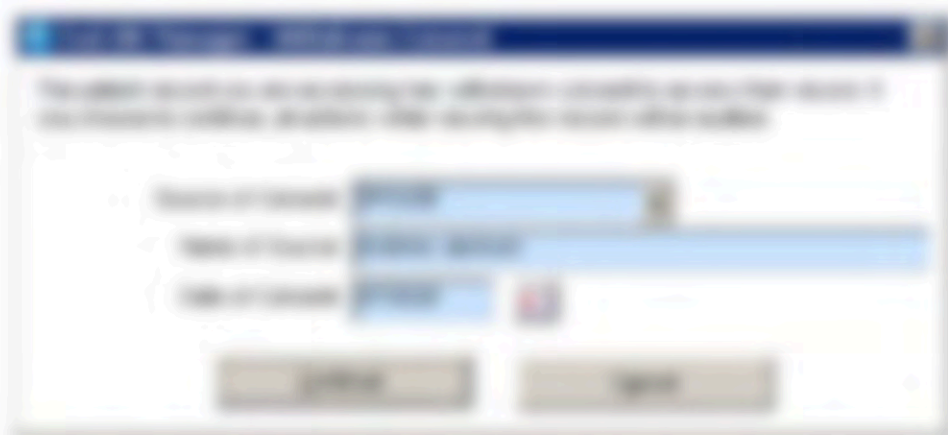
Note: The text in the message is configurable and the off warning you encounter may be different than the previous example.

Users with rights assigned to administrators can change the off status of mailbox records. Such a change creates an audit entry. Off status exists at the system level.

- If a mailbox record has off status, incoming e-mail actions on the record display a off warning screen, and the user must make a selection to continue. Selecting to continue is a off Message screen creates an audit record.
- If a system record has off status, attempting to open it displays the off Message screen.

Withdraw Consent Message

Privacy can decide to restrict users from viewing their health record data which is referred to as Withdraw Consent. In order to use Withdraw Consent action records, a user is required to provide evidence of consent approval, and may be required to enter the person who gave permission to use it, for example, the patient or any relative of the patient. This information is captured in the Withdraw Consent message that appears either opening or editing a meeting or case record in off Message, SmartPhone, or off Message to this format. The user record is accessible only after viewing Outlook or the Withdraw Consent message which creates an audit entry.



The top bar appears at the top of the message is configurable in Security Manager. See the Security Manager Guide.

Note: All fields must contain a value

Source of consent: Values from the Source of Consent dropdown in OS Manager are listed in alphabetical order.

Name: Free text with a maximum length of 50 characters.

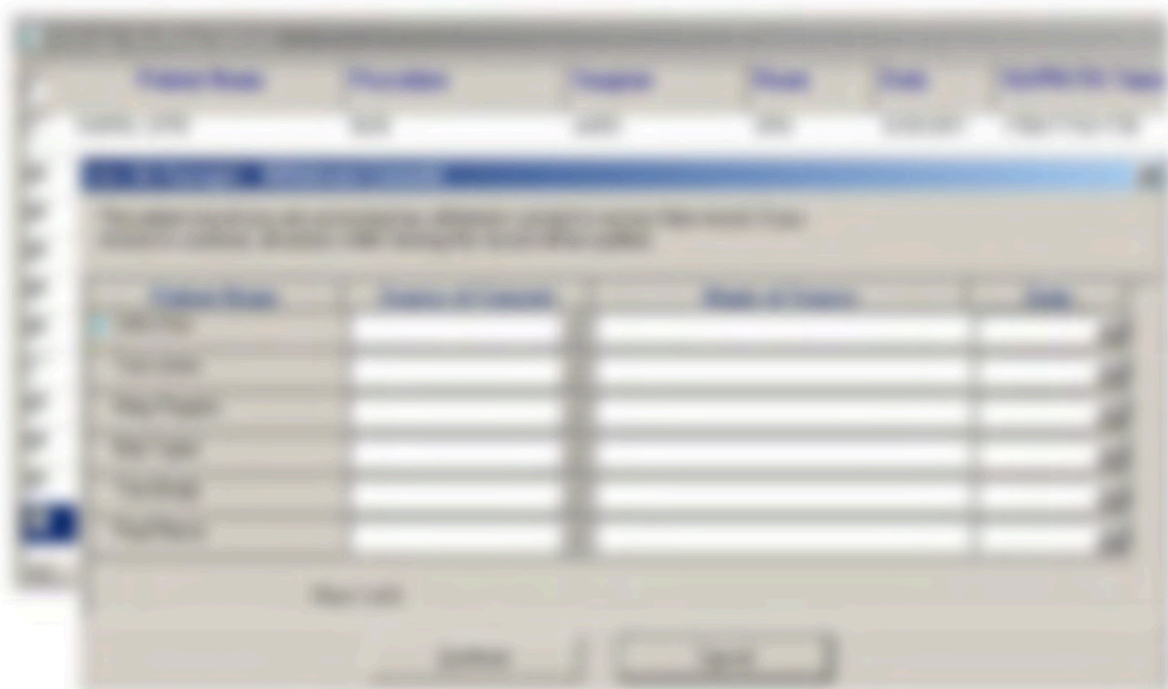
Date: Standard date control that defaults to current date but is editable.

In the fields on the Windows Consent screen are pre-populated if any user has already entered address consent information for the same subject. This applies after a user opens a subject record from any application. It also applies after creating a new building or user record.

Note: If no previous records in the subject's record exist, the date field is populated with today's date.

Printing

The Windows Consent message is displayed when user records or building records are printed. The message displays reports, subject reports, address reports and PPSN forms for user records. When printing multiple user records or buildings with addresses, consent up to address, a subset display of the selected addresses, consent subjects with the addresses, consent information provided.



Field-Level Audit Trail

The Field-Level Audit Trail, which you can display in **Off Manager**, shows changes in the OFF status of records. The report also displays the audit information for the Patient Information Consent form.

Patient Access Audit Trail

The Patient Access Audit Trail, which you can display in **Security Manager**, shows audited incidents of access to records that had OFF and/or Withdrawn Consent status when the access occurred.

When a patient is both a OFF and a Withdrawn Consent patient, the Withdrawn Consent action displays first. When the user starts handling the OFF message action, **Handling Feedback** in the OFF message window is used to add Withdrawn Consent and OFF information. **Handling Feedback** in other screen results in no audit record created and the user is not able to see any patient information.

The Off Manager Configuration Guide includes an appendix that describes the Privacy Manager, OFF, and Withdrawn Consent features in more detail relative to Off Manager, SmartForms, Security Manager and Off Manager Web Access.

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