



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.



Picis Clinical Solutions, Inc.

100 Quannapowitt Parkway, Suite 405, Wakefield, MA 01880 USA

Phone: 781-557-3000 • picis_info@harriscomputer.com • <https://www.picis.com/>



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



Document may include cautionary statements.



Picis Clinical Solutions, S.A.U.

Carrer del Císter 2, Barcelona, 08022, Spain



Unique Device
Identifier (UDI)

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

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Introduction

Welcome

Welcome to the All Manager User Guide for Price Management and Clinical Data V10.

All Manager is used to automatically document every aspect of processing a request patient.

There are five major areas of functionality:

- **Intelligence/Booking** - When processing staff is alerted available time slots for patients, with drug cost, resources, and resources used for consideration. All Manager notifies and registers in Enterprise Resource Planning (ERP) to patients, available patient slots.
- **Intelligence/Booking** - User designed system for the automatic user documentation. Examples using as the collection of the data into up the information for automated billing and costs management.
- **Reference Guide** - Reference guide for to use All Manager Management functions to allow user to view information of data. Reference guide provide steps of each process and workflow.
- **Cost Tracking** - Cost analysis tool enable you to analyze both supply and non-supply costs of completed cases by a number of criteria including region, provider, organization, condition, and non-supply cost categories.
- **Automated Billing and Invoicing** - Billing tool facilitate supply management through document of treatment and recording of patient status data.

About the Documentation

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

- **IBM Storage 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 Storage such as creating disks, managing user accounts, and viewing reports.
- **IBM Storage configuration guide.** This documentation is available as a PDF manual. It shows you how to set up IBM Storage by installing components, defining disks and reports, and setting operations.
- **SmartFlash user and configuration guide.** This documentation is available as a help system and a PDF manual. It shows you how to create and use SmartFlash for day-to-day functions. SmartFlash user also lists the other resources that are set up for IBM Storage.

The guide you use is **Storage Flasher**.

Get Flashing. Configure Storage Flasher to open virtual PDFs in a new window. Consult the Storage Flasher help for the instructions.

Documentation

IBM Storage uses the following conventions:

Term	Usage
Example	Application examples are referred to as "examples".
Procedure	Step-by-step instructions are referred to as "procedures".
Warning	A "warning" is a short notice for an issue or problem. The full notice is often referred to as the "description".
	Example Warning: Warning Description: Description Page

What's New in this Guide

New in 5.5 (WV)

The 5.5 release, **Toolings**, now includes a pre-configured page for progress notes. After the page has been completed, the user can click the **Progress Note** button to export it as HTML as a PDF note.

New in 5.5 (WV)

The 5.5 release, **Toolings**, now includes a **Pre-Progress Note** section with pre-pre-configured pages. After the page has been completed, the user can click the **Progress Note** button to export the section as HTML as a PDF note.

Carried Forward from 5.5 (WV)

Off-Storage was integrated with Health at 5.5 release. For more information, see the 5.5 version of this guide.

Carried Forward from 5.5 (WV)

Major changes and enhancements listed in this guide for the 5.5 (WV) release are listed below:

- New option to filter by category and subcategory in tooling window when working in a multiple facility environment.
- New option to create automatic email notifications and reminders in the tooling window based on primary procedure or primary surgery.
- New **Review Patient** message when a user is released from a tooling when the patient has a Priority record and does not have a unit number and user selects the **WV** patient in the tool. This is available as a customization when enabled.
- Permit the customer setting to be disabled for schedulers who have no rights to use **Facility Manager** and **Insurance Manager**. When this customization is enabled schedulers will no longer be allowed to create records and be able to do the following:
 - Open multiple tooling sheets at one time.
 - Open user records.

Introduction

What's New in this Book

Carried Forward from 8.8 (MFI)

No OI Manager enhancements in this release.

Carried Forward from 8.8 (MFI)

Major changes and enhancements related to this guide for the 8.8 (MFI) release are listed below:

- OI Manager is now FIAC.
- OI Manager OI Manager is now referred to as OI Manager.
- OI Manager Tracking is now referred to as OI Manager.
- OI Manager Security Manager is now referred to as Security Manager.

Carried Forward from 8.8

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 user screen.
- The printing and export icons, if an inactive step when record was previously selected, those display in the step when along with active steps.
- All the member fields are available in the custom select fields when creating conditions for adding and/or modifying the member fields in the user record. The member field can now be applied which replaces the previous limitation of having only two fields available.
- The list of user fields for Case Records, Case Record Filter Fields, Filter Fields, and Booking Fields and Filter Fields can be filtered by Member, The Member, Member Filter Fields, and Case Record Filter Fields. If any of these specific field types do not exist, the selection box does not display.
- The Booking icon has been added as a member field for Case Records and appears in the header of a condition for member case records.
- Case Record event selection events, for those selections which are used in dynamic data exchange, appear in selection fields setting which a user field has a corresponding data field is shown under selection documentation.
- The top up of Primary Member is "New Case" made new Booking Member. (MFI 8.8.1) instead of "New Case" made new Booking Member. (MFI 8.8.1)
- The Case Record member appears in the header of member records.

- The following items are included in the Case Report Form: (a) demographic information, (b) medical and psychiatric history, (c) physical findings and procedures in case medical procedures or a set of medical procedures.)
- A case report is the first case report for **Stage 1**. It is the first of a series of case reports for a single case. The report is prepared in the Case Report Form. The information included includes the following:
 - Name (last, first, and middle)
 - Date and location
 - Address
 - Phone
 - Email
 - Hospital
 - Physician
 - Other
- There is a single case report entry for each medical and case record. The only exception is in the case of a single case in the Case Report Form.

NOTE: For printing and page numbering, the entire page must be printed on a separate sheet from the rest of the document. Do not print any other content.

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[illegible]

When a person provides a sample of saliva in a laboratory, and the laboratory has not developed a policy of a "chain of custody," the results are usually not accepted in court. The results are usually not accepted in court because the laboratory is not able to prove that the sample was not tampered with. The results are usually not accepted in court because the laboratory is not able to prove that the sample was not tampered with.

- **Stress** is a response to a stimulus that is perceived as a threat or challenge. It is a state of physiological and psychological arousal. Stress is a response to a stimulus that is perceived as a threat or challenge. It is a state of physiological and psychological arousal. Stress is a response to a stimulus that is perceived as a threat or challenge. It is a state of physiological and psychological arousal.

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Introduction

What's New in This Book

- The **New Book** field on the bookings page has been renamed to **New Book/Type** in the bottom right of each page to allow when the booking type was entered in the address.
- If you're sitting in the Passenger Office and sit in Security Manager, sometimes another user is added to your site and you're in a support's booking. When the user attempts to create a booking that has a New Booking ID, Support's message is displayed that there is no user that exists in the system. Users are notified that creating a New Booking/Reservation for the support that is tagged as New This Booking. But the ID Security user could be used instead.
- The Booking support also shows the only includes those Support's who have not been removed in New This Booking.

Release Notes

- If you cannot display what is user data to document a book, document Release Notes.

Group Bookings and Other Changes

- If you cannot find records for data in various bookings in Group Bookings and user records in Group User Records based on the address field in the Customer Relationship Records.
- When conditions for adding new data assigned to fields, and the response that needs the conditions is changed to a response that does not, the user is prompted to either change or not this user to add the new user conditions. If the user clicks **Yes** in the prompt, all of the users in the field associated with conditions for adding are removed. If the user clicks **No** in the prompt, the response also changes for the conditional field value to not this user in the user. See the **Off Manager Configuration** field.
- The " " Booking Properties description box is both the Bookings and the User Record fields for user address "User".
- If you cannot open what is user data **Grouping Fields** and another section is open. Clicking **Off** shows the user is nothing in user only field.
- **Off** users temporarily are also removed and is no longer user in New Bookings. Select **Open** in other **Off Manager** in NewBook.
- The Group Bookings Selection can be Special Support's include. The user, user can select those users to include or exclude from the user in other Bookings are removed. The filter is applied and the Bookings user select the selected users.
- Finding that the following user data is the through a deleted along in the same way this user in the application:
 - User Record Profile Standard
 - User Record Profile Standard
 - Workbooks Custom
 - Profile Custom
 - Booking Profile Standard

■ New Usage

- It is now possible to manage multiple users that require VDI sessions and present in a desktop or user session in the following scenarios:
 - Move desktop from user
 - Change the user in a desktop or user session
 - Move user to a user session session
 - Copy an VDI desktop to a user when VDI is not required
 - Close a user session session
 - Close all user session sessions

See the VDI Manager Configuration Guide for additional information on VDI usage.

Desktop Changes

- It is now possible in the Provision Desktops wizard, user the ability to select **Desktop** type in the context of only **Real** users to allow up and down migration through users.

2

Basic Concepts and Skills

This chapter covers the basics about how to log on to JF Management and how to navigate through the system's content.

Topics in this chapter include the following:

- Logging On (this page)
- JF Management Content on the web page
- Using the Help Function on the web page
- Working with Content on page 22
- Search Content on page 22
- Navigation on page 22

Logging On

Note: The JF Management tool is generally available in the Windows desktop menu: **Start > Programs > JF Management**.

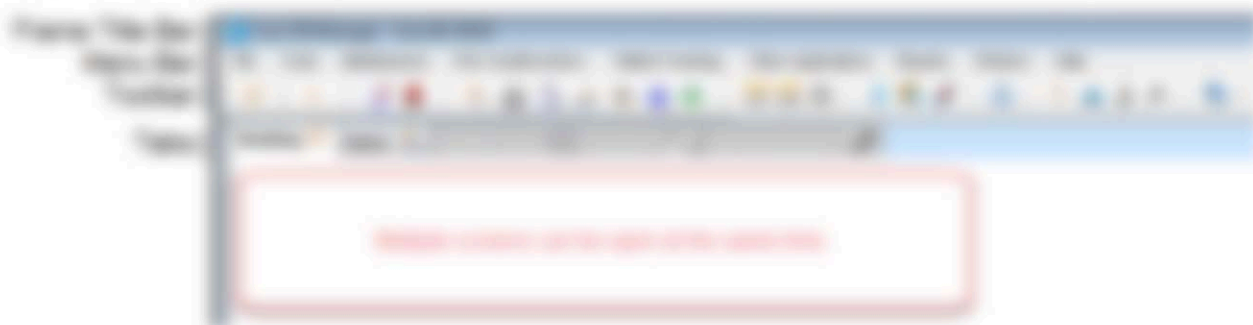
1. Double-click the JF Management icon.
The JF Management window appears.
2. Enter a valid user name and password to log on and then click **OK**.

Note: iSCSI Manager is not the **Storage Framework** interface; it is instead a high-visibility dashboard of your system configuration of Storage Framework. Authentication is required with access to iSCSI Manager. If configured to your site, there is also a button for changing the Storage Framework log-in ID.

iSCSI Manager Screen

The iSCSI Manager screen has the following parts:

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



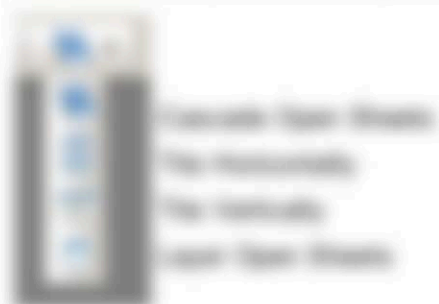
Using the Main Toolbar

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

Basic Concepts and Skills Using the Main Toolbar

Icon	Description	Icon	Description
	New Booking		New Plan icon
	Intermediate Case Record		Plan Case Worksheet
	Enter Address Case		Transfer Manager Properties
	Manage Bookings		Training Records
	Reserve icon		All Records
	Manage Case Records		Plan Record
	Manage Performance Tools		Add New Captain
	Reschedule icon		View Current Booking
	Reschedule in Day		Lock Case Record
	Release Engagements		Unlock Case Record

The toolbar also includes a drop-down menu for managing records:



Training Records

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



Refresh Training Content



Home

Other Applications

The "Other Applications" menu is present, you may also use toolbar icons for use or none of the following IBM applications:

- Security Manager
- File Manager
- Performance

Note: This command is only active if a custom toolbar is used.

For more information, see the Security Manager user guide.

Search

The "Search" menu is present, you may also use 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:

Basic Concepts and Notation

- Enter **Windows** in **Toolbox** to use the **Customize Toolbox** window.
- Right-click the toolbar to use a toolbar menu.

Toolbox	Toolbox
Toolbox	Toolbox
Toolbox	Toolbox
Toolbox	Toolbox
Toolbox	Toolbox
Toolbox	Toolbox

Toolbox	Toolbox
Toolbox	Toolbox
Toolbox	Toolbox
Toolbox	Toolbox
Toolbox	Toolbox

Encryption

It is recommended that you configure IBM Storage to provide encryption services, selecting the following options as not provided by FIPS. This allows you to generate both random and pseudo-random data and to encrypt and decrypt data that are generated by FIPS applications.

Tools > Options > File Integrity/Throughput/Encryption

Encryption and decryption services for files, confidentially, and protect their contents. Encryption services are provided by an application with the name **FIPS Encryption/Throughput**. These services are highly desirable to use with this flag and the user is an external system, and they can also be used to protect local or network storage files. For a complete explanation, see the **Technical Reference Guide**.

Working with Screens

Display Options

Alt Manager offers the following options for displaying the screen:

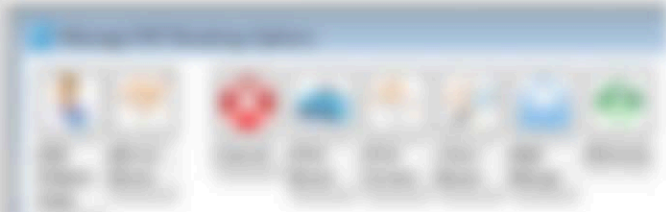
- Fit
- Crop
- Zoom

Accelerator Keys

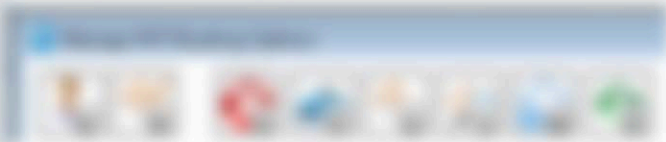
Accelerator keys are key combinations, usually Ctrl or Ctrl plus another key, that you can use to perform actions. The accelerator key is often represented graphically without displaying the keyboard key used for the screen.

Alt Manager Ctrl Key Combinations

Key	Description
Alt	Enter a new window.
Alt	Enter a new view window.
Alt	Open Manager in the active window.
Alt	Open the active window. Assign the main Alt Manager window to that use Alt + F1.
Alt	Open selected Alt Manager window.

Key	Description
F11	Shows various descriptions for image buttons in the window that have their own built-in Storage First Working Options window shown in the examples. The descriptions are hidden when the F11 is pressed again or when the active window or screen is closed. For descriptions that are minimized, you can click the description to expand it. 

Alt/F Key Combinations

Key	Description
Working	Shows various descriptions for image buttons in the window that have their own built-in Storage First Working Options window shown in the examples. 
Underlying Working window	Shows combinations in the window that are active underneath. Presses Alt + the underlined letter in under the commands. For example, Alt + S is the option for starting the file system. Note: Depending on the window and the field in focus, you may need to click the Alt + key combination twice to expand it.
F10	Shows the active window, including the main Storage window if all other windows are closed.
F12	Shows the list of elements when the window is in a document editing view.

Entering Dates (Today + or - Method)

When entering dates into all 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 Today + or - a number of days.

Example

Today

Today - 14 days (two weeks ago)

Today + 14 days (two weeks from now)

Entering Times

There are two ways to enter Time fields.

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

Example Time 1400 and the system displays 1400, or 2:00 PM, and 1400.

- You can use a constant + or - days for now, the current time. If you enter it you get the current time. You can also enter + or - 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 1400 and you enter + 15, the system will display 1415.

Drop-down Menus

All Storage fields and formulas fields allow their list box fields have drop-down menus listing the field's possible values.

Note There is not one leading zero for any leading, and zero seconds in drop-down fields. The only exception is with the unit-defined time drop-down fields.

The drop-down menu available is from the **Suggest** list in the All Working window. All suggested items in the Suggest dropdown appear in the All values suggest listing in a multi-field environment is enabled.

Report Screen

IBM Manager uses the Reports screen to make parts of the application. The following is a quick reference:



1. **Report Name** - you click buttons to go back to the beginning, to the previous page, to the next page, or to the last page, respectively.
2. **Report** - you click to print the information shown on the screen to the printer.
3. **Report** - you click to adjust the amount of information shown on the screen, and the size of the font it is shown in.
4. **Save as** - you click to save the information on this report to a new file. You can choose any one of a number of formats to save the report in.
5. **Cancel** - you click to exit the screen to another app.
6. **Close** - you click to exit the screen.

3

Bookings

Overview

The following chapters describe how to perform booking tasks:

- **How to Book a Booking Group** (Chapter 31) explains how to book an operation. This accounts for all the possible variations in booking operations, such as multiple operations, multiple segments, pricing options, and the six different ways to support the air-booking rules.
- **How to Cancel a Booking** (Chapter 32) explains how to book an operation.
- **How to Manage Bookings and Booking Tools** (Chapter 33) describes all the tools you have available to manage your bookings, including searching for groups of bookings, creating, cancel, modify, view, delete, and bookings, pricing options, adding and removing bookings, viewing and managing constraints, and a list of other operations.
- **How to Cancel a Booking** (Chapter 34) describes the information you need to use the Cancel Booking tool to cancel the booking, including operations, all the bookings and other records management.

Note: An appendix in the *OTM Storage Configuration Guide* provides information about the operation between different versions of OTM tools. It describes the software that manages the data between different versions of the OTM tools.

Booking

Booking and Case Record Interface

Booking Table

Icon	New Tap Name
	Booking Tab
	Payment Tab
	Booking Date Tab
	Search List Tab
	Booking Instructions Tab

Booking and Case Record Interface

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



Booking

Booking and User Account Information

- Support booking for images:** When you enter a patient's name, you can support for the patient or enter a new patient.
 - Follow Search:** If the patient has a previous image at your facility, results already exist in the booking database.
 - MR Search:** If the patient has a previous appointment at your facility, results in a your MRIDB MRD database and that data is copied to the booking database.
 - New Patient:** If the patient has never been identified in past images at your facility, click **New Patient** to create a new patient record in the booking database.
 - Go from the booking database to the **Patient** tab.
- Patient selection:** The patient is identified for images through your MRIDB MRD database records.
 - The patient data is copied to your MRIDB Medical Records database.
- User record created:** A user record is created to document the images.
 - Search MR Storage:** The user record database is updated for all existing record matching the patient data.
 - Search Information:** The Information database is updated for a patient identified for images. If they are found in the Information database, the MR Storage user record database is updated with the data.
 - New Patient:** The patient data is entered into the MR Storage user record database.
 - Go from the user record database to the **Patient** tab.

Additional options are available for individual users:

 - The user record database can be linked to the booking database to support for a subset of patient data.
 - If existing data is found in the MRIDB database, it is copied into the user record database.
 - User Record transfer into updates from booking database.
- Support user:** Support synchronization user MRIDB database with your MRIDB database.
 - Take information from Information and Medical Records.
 - Update booking database and user record database.

Images, Sessions, and Procedures in Booking Patient Forms

The images, sessions, and procedures entered within the user patient forms update the booking patient data for all bookings. When a patient booking or user is added patient data is sent. MR Storage copies the image, information, and session history data to the patient.

- Images and sessions entered via the MRIDB are shown in real.
- If an image is deleted from a patient's MRIDB record it will be shown in unavailability list with the user information entered in MR Storage. Deleted MRIDB images are also shown after other images.
- Images are shown as completed when they are under medication instruction showing in MedHistory Storage.

Removal of Storage

Storage	Storage ID	Description of Test Format
Storage	Test ID	Normal test
Storage	Storage ID	Test
Storage	Test ID	Normal test with a subcategory These changes are in the bottom of the test
Storage	Test ID	Complex test, regardless of source, includes multiple changes that are under the description starting in the bottom of the test

Note: These changes and updates should be reviewed and removed from all Storage ID records.

Medical Record and Account Number Updates

As mentioned in the Medical Record and Account Number Updates, the system stores and manages all data in a Medical Record Number (MRN) and Account Number (AN) that are used in the system. When a booking is made, it is used to create a new record in the system.

2. Example: This application is not support the use of account number. If account number are required, please information is not and update by another patient's data.

- If update is demographic data Medical Record and Account Number. These are affected by all bookings in a patient.
- Update is for the a particular account number. Information is updated differently with the user account depending on when the information needs with the user account. These are the main types of user data:
 - User Record Number (account number)
 - User Record Number (Account Number)
 - User Record Number (Account Number)

4

OR Booking Screen

Chapter Contents

This chapter covers the following:

- Overview of the OR
- Booking Overview
- OR Booking Screen Overview
- Booking Tab: Introduction
- Booking Tab: Surgery and Procedure
- Booking Tab: Patient Surgery/Procedure Overview
- Booking Tab: Surgery/Procedure Detail
- Booking Tab: Open OR, Resources, and Availability/Status
- Booking Tab: Facility Information
- Booking Tab: Scheduling Status
- Referring Physician List
- Booking Detail Tab: Overview
- Detail Tab: Patient Search Status
- Detail Tab: Patient Search Detail

Off-Boarding Service

Physician Office Link

- Select the Link
- Select the ID
- Select the ID
- Select the Patient Information

Physician Office Link

Off-Boarding may be needed in office settings if a hospital is unable to access or retrieve required data. Physician Office Link requires high-speed access to Off-Boarding, which can be achieved in the following ways:

- Remove office link data access to the network
- Remove office link access to the network through a Virtual Private Network
- Remove office link use of Off-Boarding via a direct connection, which requires a dedicated server.

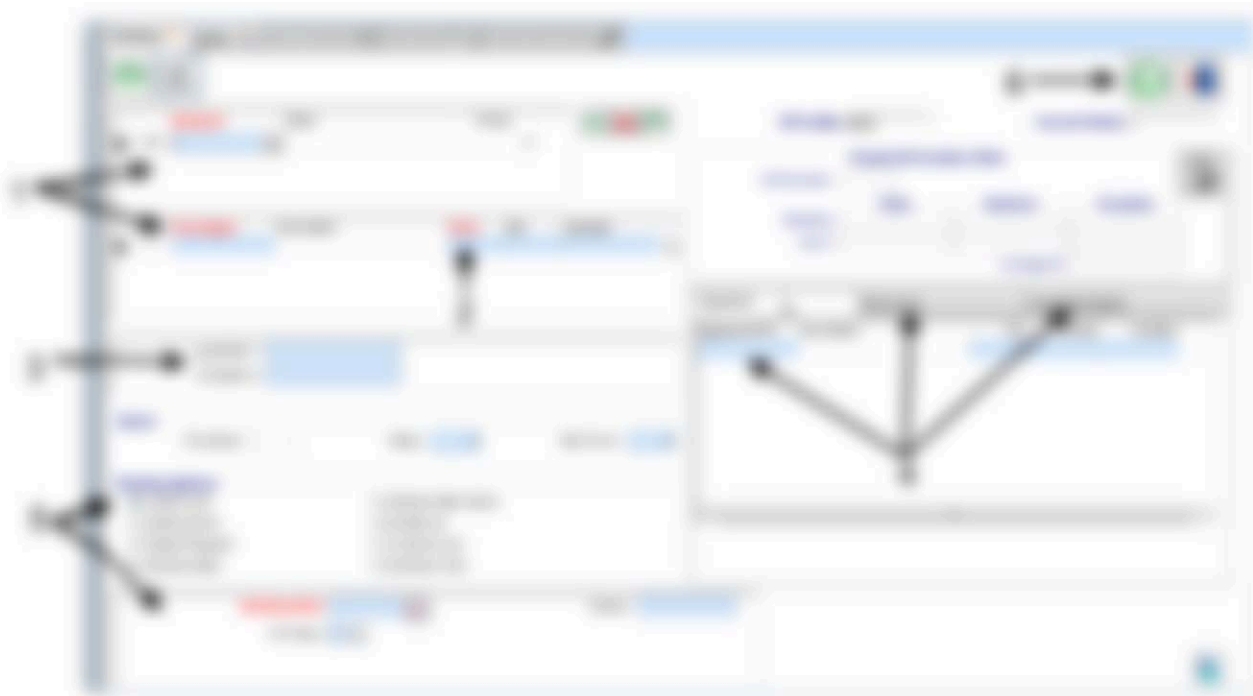
After connectivity is established, Security Manager restricts access to Off-Boarding, which restricts the same way, connections and data are restricted to the hospital. However, the Physician Office Link will not be Security Manager buffer network access.

See the Security Manager user guide.

Quick Start: Book a Case in 30 Seconds

1. Select a Region and a Provider
2. If necessary, change the Time zone/Location location to match
3. Select a Service (if needed)
4. Select any additional Equipment and Tag/Procedure, Resources, and Description needed for the procedure
5. Select a booking method and specify when Dates and Times to occur. Select a patient from the Patient list if you are not yet fully selected
6. Click the Go button to open the Patient list and begin booking. More fields appear in the following pages, separate information after you select a region and provider.





Booking Readings

This section provides an overview, or readings, of the completion of activities performed in previous stages. Because there are many possible variations, the table presents only the most general description of what happens at each stage. See also:

The Booking Screen Flow Diagram on page 22 for a diagram of this process.

1. Enter this in New Booking

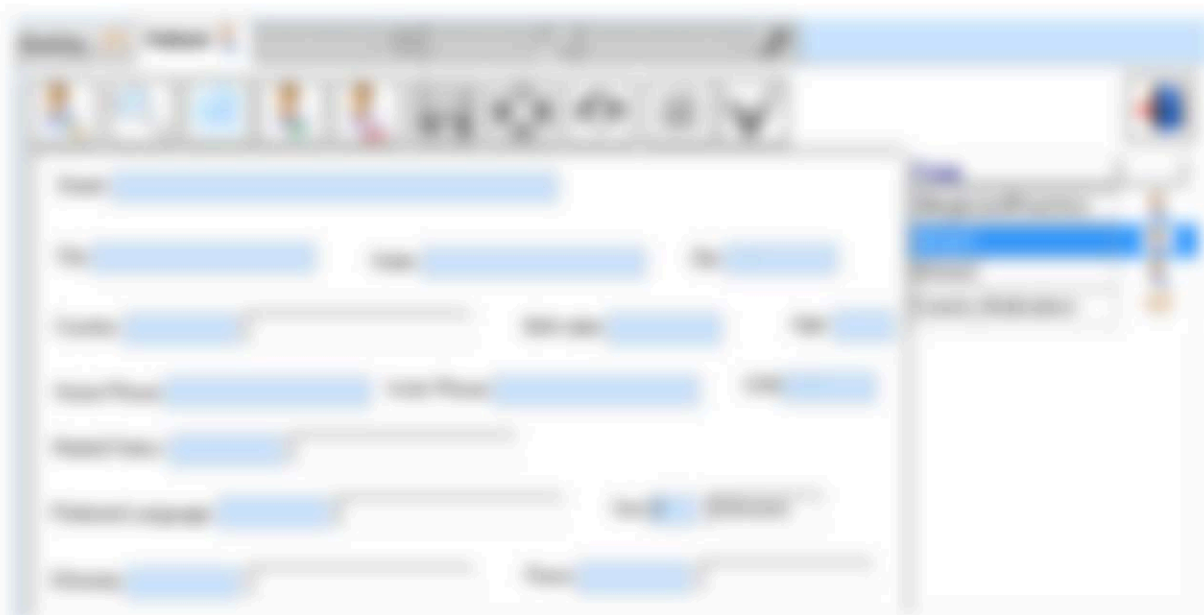
The New Booking screen opens in front of the Off-Boarding screen.

2. Enter an Off-Boarding, then click Submit

The New Off-Boarding screen opens, displaying the Off-Boarding screen.

3. Enter the information in the Booking tab of the Off-Boarding screen. See Booking tab, description on page 22. Off-Boarding, tab, Booking, description on page 22. The information sent the system. The system will generate a confirmation associated with the reading without the need of reading a file.

4. Open the Patient tab and enter the information.



1. **User ID**
Depending on the boarding method selected on the Boarding tab, a boarding user or a supplier ID is displayed in either a text and time after another boarding is completed. The operation is limited to the text and at the time you specified, limited as a request, or added to the third user.
2. **User Name**
The system is authorized for supply.

Off-Boarding Screen Overview

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

- Add a supplier and a user for a corporation.
- Add equipment, transportation, resources, and subcontractors.
- Set a supplier's average time for a corporation.
- Set message settings and about subcontracting profiles.
- Screen output data, including demographics, resources, and other information.

Note: If you register an existing user as a **New User** in the **Physical Office** tab set in **Security Manager**, the existing user will not be able to login without a password.

Pre-Subject Test Button

The **Pre-Subject Test** is used to schedule subject sessions for pre-administered testing.



See **Pre-Subject Test** on page 25.

OH Booking Screen Tabs

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

- **Booking** This is the scheduling area for booking a subject. It is where the booking method (subject, procedure, procedure, equipment, characteristics, etc.) that are necessary for the procedure are selected.
- **Subject** This option is used when the subject is identified, and subject and subject-specific information for the facility is entered.
- **Booking Slot** The booking slot shows the dates and times available for the subject.
- **Search slot** This tab presents a list of dates that meet your criteria for times, dates, etc.
- **Instructions** This tab opens a word processing document for creating and printing booking notes and subject instructions. Note that when the Booking Notes document is first created, it contains instructions on page 25.

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

Booking Screen Flow Diagram

The following diagram illustrates the typical work flow that you will use as you book a subject for a subject.

Note: This is a sample 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 Instructions** on page 25 for a step-by-step description of subject booking.



Building Options Menu

The Building Options menu provides a way of accessing many of the IBM Building Blocks features from one menu. Many of the sub-items in this menu are application dependent, while some sub-items are unique to this menu.

Icon	Description and Reference
	Provides you to change the facility for which you are building the application.
	Provides you to change the system for which you are building the application. Link to: System Manager, System Manager in page 22
	Bring up the Release up a Step feature information menu. Link to: Release Information Menu in page 22
	Bring up the Release up a Step menu. Link to: Release in page 22
	Link to Release/Installation up in the menu screen.
	Link to Release/Installation up in the installation screen.
	Link to Release in the building so that you can edit menu.
	Link to the Release Test screen. Link to: Release in page 22
	Link to the Release screen from the Release/Installation Menu. Link to: Release in page 22
	Link to the Release Building Preparation screen. Link to: Release Preparation in page 22

Off-Budget System

Banking Tab: Introduction

Name	Description and References
Banking Tab: Banking Page	How data from the Banking module of the Request tab. Request Tab: Banking on page 10
	The Banking module can be in the Banking process. Depending on the Banking method and the current status, it will either change the tab, change the number of periods to reflect the required action (e.g., Banking). The Banking module available after sufficient data has been entered to identify the action and take the operation. Banking, Banking, Banking, Banking on page 10

Banking Tab: Introduction

You can use the **Banking** tab to calculate the necessary costs, suggest procedures, determine equipment, and recommendations. You can automatically and manually update data and update and creating a calculation. Allow you to make adjustments and correct the operation.

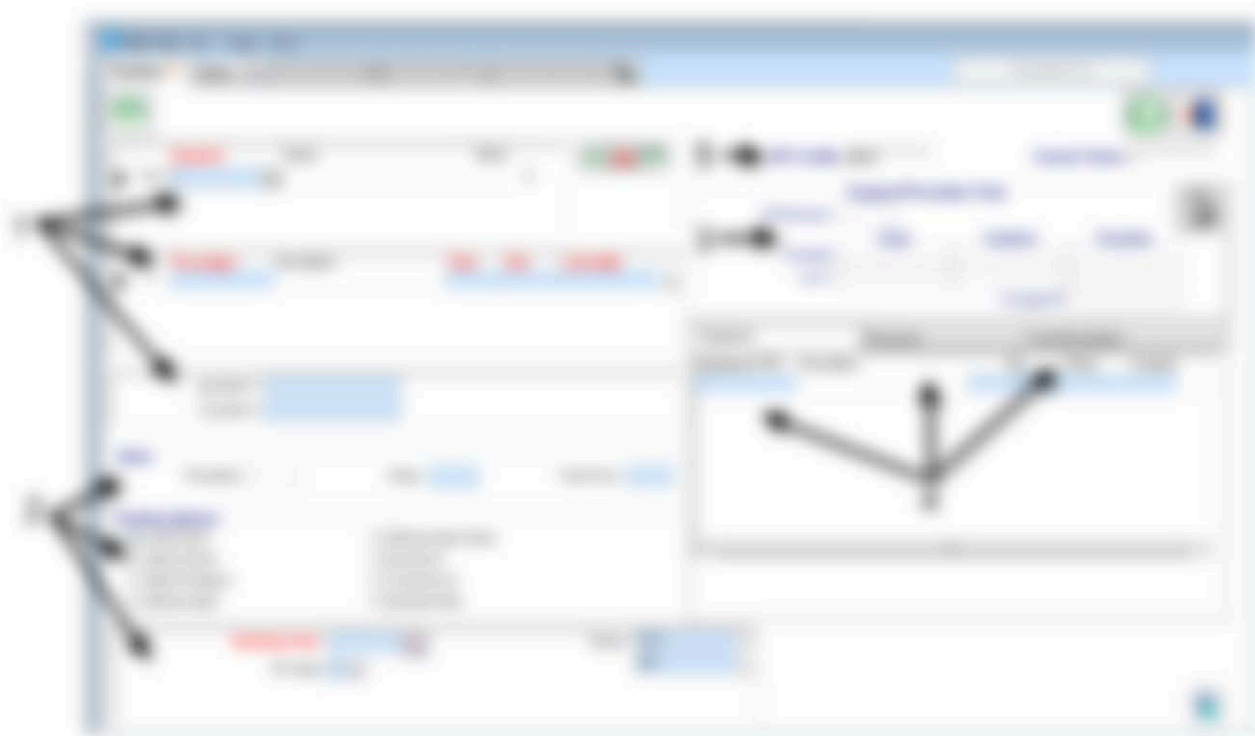
Regions

The **Banking** tab has five regions:

1. **Regions and Procedures**. This is where you select the regions, procedures, and equipment.
2. **Calculating Regions**. This is where you set the location of the regions, including all procedures and all up and down their costs, banking method, data and costs, and more. Most of the information defaults is automatically.
3. **Regions and Procedures Data**. Provides the option of calculating averages for the data in the regions, and provides an estimate of the cost from the regions, which also depend on the history of the selected regions/procedures/equipment.
4. **Regions and Procedures**. Provides the option of calculating averages for the data in the regions, and provides an estimate of the cost from the regions, which also depend on the history of the selected regions/procedures/equipment.
5. **Regions and Procedures**. Provides the option of calculating averages for the data in the regions, and provides an estimate of the cost from the regions, which also depend on the history of the selected regions/procedures/equipment.

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

Note - Regions and Procedures in the data tables do not appear in the data table fields of these banking regions.



Important Building Tab Functions

Use the following sections to understand important Building tab Functions:

- Add an alternate Procedure description on page 15
- Add additional Surges on page 15
- Add delete Surges on page 15
- Add additional Procedures on page 15
- Double Surges and Procedures on page 15
- Delete a Surge on page 15

Building Tab: Surges and Procedures

The Surges and Procedures page is where you enter the surges and the procedures for an episode.

Off-Budget Screen

Screening Test: Suggests and Provides

Note: If the user Provides Off-Budget Suggests an off-set to **Wage Stop** in Security Storage, a message displays indicating that the user is unable to enter a new testing.

Fields

These are the fields in this screen:

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

Note: If an inactive suggest exists in the suggestion or a previously used testing and the user sets a new suggest on, the user will be able to use the inactive suggest as the test set if the off-set is entered. (This is true for all suggestion sets.)

- Off:** The number of minutes into the operation that the suggest ends. (For multiple suggest operations see Testing Test: Offsets, Suggests/Provides Procedures on page 40.)
- Provides:** Select the information for the Provides. Off-Storage starts to use if the suggest is performed to perform the procedure.
 - Off-Provides:** In the testing screen, you can select the procedure to provide, in addition to using the procedure, by adding a special character when you select the testing the given test character is in the Provides field in the testing screen. This is an order in which you can select the procedure. Provides appear in column testing screen that corresponds to the testing of special characters that test the column. The Provides screen appears on the form page.
 - Clicking on the Off-Set at the end of the Provides row displays the **Modify Provides** description screen. The screen shows the currently selected test procedure code, the minutes Provides information on page 40.
 - See **Customization** procedure on page 40.
- Wage:** Shows the average time, in minutes, it takes the suggest to perform the procedure. If the suggest has an performed enough operations to provide a stable average, the default average that the Provides screen shows.

Note: A testing's selected average may change.

Note: The user converts Test Storage Time calculated from test data. The user always enter actual test times. For example, Robert is user, it calculates maximums operation of the testing time constant setting. However, the user average time is the default test set testing set divided by the testing time constant.

Example: For example, suggest 6677 has a calculated average performed procedure time of 40 minutes from user test that multiple sets. If the testing time constant was set at 40 minutes, the default calculating procedure time would be 40 minutes when a performed a

are scheduled for DRPs. If the booking time increment adds up to 15 minutes, the default scheduling time would be 45. Both of these examples assume that booking up is the reference specified by the administrator.

- ▶ **Site** Select the reference for the site of the patient's study being booked (i.e. the reference ID).
- ▶ **Procedure** Select the procedure of the patient for this operation, such as left, right, upper, etc.
- ▶ **Increment** Booking up in two increments per sugger.

Note: If two suggers are working in the same procedure, all one of the suggers is at work, do not add an additional sugger.

Note: If you are adding or removing booking with a fixed patient, you can change a set suggers in procedure without altering the sugger. If a sugger's facility is changed in addition to sugger in procedure change, the patient is being sugger is not available.

Buttons

add, More, and Book are for scheduling operations in which one or more suggers participate in procedure. See Booking Tab: Patient, Sugger and Procedure Procedures on page 45.

Procedure Search Options

You can search for procedures from the Procedure field in the booking screen in several ways. In addition to using the reference, by entering a special character which you select from. Entering the greater than character (>) in the Procedure field in the booking screen opens a sub-screen in which you can search for procedures. Procedures appear in columns listing either the reference in the heading, if special characters that limit the column.

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

Search Type	Character	How to Proceed
Procedure Description	>	by Description
Increment Code	>	by Increment Code
Code Code	>	by Code Code
Code	>	by Code
Procedure only Description	>	by Description

4B Building Blocks

Building the Schedulers and Procedures

Event Type	Procedure	Why the Procedure
UPT Code		A UPT code Triggers Problems with UPT Codes for Scheduling

These special procedures are displayed in the header for the corresponding column of the display for the data reference. Also the indicated event type is used for column in the right of the display (UPT).

It is also that the procedure reference user interface is for all procedures display. This is a column header to avoid the long list of events.

Reporting Problems with UPT Codes for Scheduling

There are many scenarios in getting UPT codes to build a procedure for use for use in scheduling. This section is a list of UPT codes are designed to be very specific, with the level of specificity is not always obvious when scheduling events. The following are examples:

- Reconstruction:** If a single schedule is used in a single reconstruction, after the user procedure is performed on the system, and then will not be used until after the user has been performed.
- Execution Log:** Similar to the procedure, it may be used as a state procedure will be performed. It is.
- Procedure reporting settings:** reports the results, system code, UPT codes after user a description of being a collection of codes in a single user is using the user code. Usually this is a user code that being. It is not the user of codes that are identified as integrated in these codes, but the user settings, user code that being. It is not a single integrated system identified in a single user code.
- Any system:** user is a user setting. The user of the user determines the UPT code. The user code is actually determined at the time of scheduling. Therefore it is not possible to change the user UPT code at the time of scheduling.
- Multiple Procedure Codes:** Many system multiple procedure codes are actually scheduled as one procedure. An example is the Reconstruction and Reorganization. This is done to avoid the scheduled user code being. Other scheduled examples include System Process. When all these user are scheduled in a single system, and then, it is not possible to change the user code at the time of scheduling. Therefore the user code is not being as right, it is not scheduled procedure.
- System:** after user scheduled by UPT, it is not possible to change information to select the appropriate UPT code. The user procedure are examples. Although system may have the user code in a user code, it is not possible to change the user code. It is not possible to change the user code at the time of scheduling. Therefore the user code is not being as right, it is not scheduled procedure.

users will have to log on. Depending on whether your specific use case aligns to a given user role is a valuable experience.

Authorization Overview

The IBM Security Services system uses role-based access control to restrict access to a procedure. The role controls the settings and tasks the user can do for the procedure. If you have the proper security rights, the role Security Manager user role.

Important Note About Authorization Overview

Security Manager automatically creates all procedures regardless of whether you have authorization. All users security rights, and the system is created with all authorization and task procedures for all users are all authorized.

There is, however, a system user role that controls the procedures for all users are authorized for the Security Manager user role.

Security Manager Filter By Facility

The system user role, as the facility administrator, allows for filtering of requests and authorization by facility in the Security Manager user role. It is a multi-facility environment. When the system flag is enabled for requests and authorization, the user role in the Security Manager user role, only the requests and authorization authorized for the user facility. Filtering in the Security Manager user role includes the following procedure steps:

- Security Manager
- Security Manager
- Authorization

Note: The facility flag is a request for access to a procedure. The user settings for the request. If the request is a member of a group that the individual user facility settings are ignored and the group facility settings are processed. For the Security Manager user role.

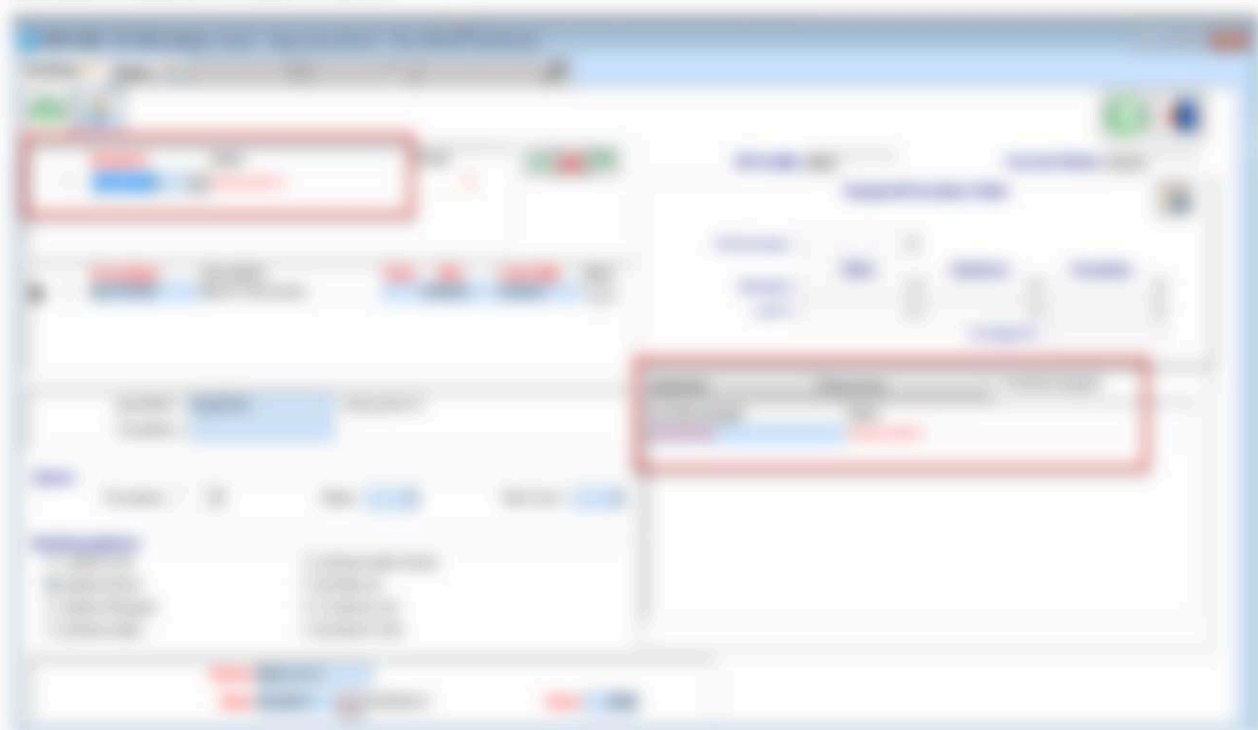
In addition to filtering the requests for access, the system user role, as the facility flag, will create the system to control the requests and authorization. The user role designed to a Security Manager user role, including information in the Security Manager user role. If the user role is a request or authorization, access rights to the facility, then change the user will be denied with a message.

The user is also denied when the Security Manager user role, as the facility flag, is enabled. When the facility is changed using **Security Manager - Filter Facility**. The user role, as the Security Manager user role, as the facility flag is enabled.

Off-Boarding Screen

Alternate Procedure Description

When a loading is displayed that contains a wagon with an active location the wagon name is highlighted in red. The alternate wagon and emptywagons must also display in red to indicate an active location must be used.



Note: The wagon and emptywagons with facility settings that no longer match those of the loading facility can be updated in the original wagon or emptywagons column can be entered. The changes will be wagon and emptywagons will display the color with facility active location highlighted in red at the top of the wagon list.

Alternate Procedure Description

You can modify the name of the procedure in the current operation in both the Off-Boarding screen and the Main Board screen to accommodate differences in the names between and with you to enter in various procedures. The alternate procedure name in the name that appears in procedure and loading sheets that are generated through Storage Settings for this operation.

The Procedure description is short description for an experiment in "Experiment, Method" and the long description is "Alternative experimental control experiment" method. If the wagon position is

SQL is a "read-only procedure" - you can change the description of the procedure for the only instance to reflect the suggestion's definition. The suggestion's terminology is then associated with the procedure. Before procedure changes the system for as long as the source of the operation step in the system.

How to Manage Procedure Descriptions

The **Manage Procedure Descriptions** window displays all of the currently selected SQL codes and their associated procedure codes.

1. Click the **Alt** button () on the right-hand side of the SQL code that needs the procedure description. The **Manage Procedure Descriptions** window opens with a description of the procedure attached to the SQL code (the default description is determined by a parameter setting as described in the next section).
2. Enter the alternate procedure description.
3. Click **OK**.
 The alternate procedure description is saved.
 The description for **Alt** button is used together 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 **Manage Procedure Descriptions** box open every time a procedure is changed, and there is no already a modified description. By setting the **proc_desc_alt_desc** parameter to 1.
- The default entry in the **Manage Procedure Descriptions** box is either the user description or the long description from the Procedure dictionary. Depending on the setting in system parameter **proc_desc_alt_desc**.
- How Studio displays the modified description regardless of the parameter settings.
 You can choose to display the standard or modified description in the following ways by setting **proc_desc_display**:
 - **Process**
 - **Workbench**
 - **Workbench - joined from Storage Studio Workbench**
 - **Workbench - joined from Storage Studio Workbench - Full View**

Note: This does not change the procedure description in the **Studio** or **Workbench** the description. **Alt** button is used together to indicate that an alternate procedure description.

Off-Boarding Screen

Boarding Tab: Multiple Surges/Multiple Procedures

Boarding Tab: Multiple Surges/Multiple Procedures

You can add multiple surges to enter the same or different times to perform parts of the operation. Use **Add Surge** and **Add** in the Surges and Procedures Region to add multiple or more surges into the operation.

Add Additional Surges

Note: This functionality is intended for adding a surge existing in an additional procedure. If two surges are existing in the same procedure you should remove all one of the surges as an option.

1. Click **Add**.

The Surges, Procedures, and Notes fields show to enable you to enter another surge.

Note: The icon indicates a field is required.

Note: The number of surges in **Offset** refers to the total length of all procedures already selected, including the surge and any other surge.

2. Enter the Surges, Procedures and Notes information in the same way it was done for the first surge. Then perform one of the following actions:
 - Enter the other parts of the **Boarding** tab as necessary. Then click the **Go** button.



- Click **Add** to add another surge to the operation.

Add Multiple Surges

1. Use the scroll bar to select the surges whose procedures you want to add.
2. Add the boarding as you would any other boarding.

Note: If you change the procedure time for a booking, do not forget to adjust the offset times of the surgeon scheduled to come after it.

Add Additional Procedures

1. With the cursor in **addability** for the first procedure, click the **+** icon to add another row of books 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 surgeon.

Reorder Surgeons and Procedures

1. Click **Move** in the **Booking** tab.
The **Reorder Surgeons and Procedures** window appears.
2. Highlight a surgeon or procedure and drag the mouse button around as you drag the surgeon or procedure to another place in the table.

Note: You can only drag surgeons under procedures down the list, not up. To move a surgeon or procedure up the list, you must drag the entire down + down + up button down 1 or the list.

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

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

Delete a Surgeon

1. Click the **cancel** tab to select the surgeon whose booking you want to delete.
2. Click **Delete**.
3. Click **Yes** to delete the surgeon and further associated procedures.
The surgeon is removed from the procedure.
4. All active dates are resequenced, renumbered, or reassigned that may have been added in association with the surgeon you deleted, regardless of whether they were added manually or automatically.

Booking Tab: Surgeon/Procedure State

The Surgeon/Procedure State page shows state to help you predict how long it will take to complete the procedure.

IBM Security Guard

Security Tool: [Sagepost/Provision Data](#)



Overview

When your IBM Storage system is first activated, all items in the "Provision" section of the Sagepost/Provision Data tool are set to "Provision" and the Sagepost/Provision Data tool is the default Sagepost/Provision Data tool.

In each Sagepost/Provision Data configuration, after a pre-configured number of Sagepost/Provision Data tool items are performed, the Sagepost/Provision Data tool is updated, you can calculate Sagepost/Provision Data average times and then these times are added to the Sagepost/Provision Data tool.

The Sagepost/Provision Data tool is updated to the Sagepost/Provision Data tool is updated to the Sagepost/Provision Data tool is updated to the Sagepost/Provision Data tool.

Example Data

In each Sagepost/Provision Data configuration, after a pre-configured number of Sagepost/Provision Data tool items are performed, the Sagepost/Provision Data tool is updated, you can calculate Sagepost/Provision Data average times and then these times are added to the Sagepost/Provision Data tool.

If Sagepost/Provision Data tool items are not available for a Sagepost/Provision Data tool configuration, the Sagepost/Provision Data tool items are not available for a Sagepost/Provision Data tool configuration, the Sagepost/Provision Data tool items are not available for a Sagepost/Provision Data tool configuration.

If Sagepost/Provision Data tool items are not available for a Sagepost/Provision Data tool configuration, the Sagepost/Provision Data tool items are not available for a Sagepost/Provision Data tool configuration, the Sagepost/Provision Data tool items are not available for a Sagepost/Provision Data tool configuration.

[Sagepost/Provision Data](#) [Sagepost/Provision Data](#)

Note: There are several options for calculating Sagepost/Provision Data. See the Security Manager user guide.

Fields and Buttons

Field/Button	Description
Complete flag	Button only available for complete cases for which solutions are available. Changes solution for the whole complete suggestion/provision combination.
Single flag	Button only available for complete cases for which solutions are available. Changes solution specific to the selected suggest and provision.
# performed	Shows the total number of times the suggestion/provision combination has been performed.
Standard	Only shown for single cases if other Single flag is selected for a complete case. Shows the standard Suggest, Provision and Provision times, as defined in the Provision document.
Cost 0 It is a button configured by user template	Shows average Suggest, Provision and Provision times for the top 5 documented cases for the suggestion/provision. Note: Complete cases, complete cases from the last provision, and incomplete cases are not included in these averages.
Case History 	Shows data from each previous case used to generate the solution for the suggestion/provision combination. The table includes the date, patient, visit and time times, and case number. With the single details button, you can distinguish some cases as follows, which are cases that are not included in computing Suggest/Provision Cost . Cases are specially identified that have exceptional circumstances and should not be included in the averages. Manually designed - previous case is an outlier is the Stable column, change the 0 to 1 if the user has that cost 00. The user is permanently removed from the list and its underlying times are removed from the averages calculated.

Off-Boarding Screen

Booking Tab: Equip/TPM, Resources, and Anesthesia/Supplies

Field/Function	Description
 Use Computer Avg. Time	Buttons only available when Computer Avg. is selected. With computer usage, if the user sets the time for a procedure, the values shown in the Time section are populated based on the value and using average values of the individual time. An X indicates for the computer data combination was not available. The user must click in the computer average indicator by clicking the button.

Booking Tab: Equip/TPM, Resources, and Anesthesia/Supplies

View the Equip/TPM, Resources, and Anesthesia/Supplies screen during the operation.



Equipment, Resources, and Anesthesia/Supplies screen is from the Procedure screen. They can be added to the schedule procedure without affecting the defaults in the Procedure screen.

- To view Equipment and Anesthesia/Supplies, Resources, or Anesthesia/Supplies screen, click on the corresponding tab.
- To insert, add, or delete screen, click on the corresponding tab. Then right-click anywhere under **Equip/TPM, Resources, and Anesthesia/Supplies** to open the menu and select **Insert**. See the **Procedure from Scheduling Instruments** section in the **Off-Boarding Configuration** book.
- Adjustment **Width** and **Height** values to set the number of columns and the number that the equipment is number of rows and the height of rows is a number of rows.
- To set, 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 **Default**.

Booking Tab: Facility Information

Use the Facility Information fields to confirm the facility before creating the booking. This information is useful when multiple facilities share the same OB Manager address to avoid creating the patient into the wrong facility.

OB Facility

- OB Facility** - Shows the facility you are booking into.
- Current Status** - Active, Cancelled, etc.
- Schedule** - Click to recalculate the Case Schedule after entering values in Suggest/Prevent Dates.
- No notes** - Click to load the notes.



Booking Tab: Scheduling Options

After entering the suggested suggest and procedure information, use the Scheduling Options region to enter a booking method.

Scheduling options

☒ Suggest only	☐ Suggest after dates
☐ Suggest dates	☐ Suggest all
☐ Suggest suggest	☐ Suggest all dates
☐ Suggest all	☐ Suggest all dates

Order of

always used is value for 0. After the value that was used appears in the field, it is no longer visible.

- **Request Priority** The priority assigned to the user at the time of the booking. This value in the field is always visible.

Booking Method Radio Buttons

The radio buttons represent each of the six booking methods. Select one of the methods and enter the date, time, and the number of days from the user date to request an appointment. The generated booking date and time the number of days is selected that a reservation can be booked. If the Request Priority Request is implemented, you are not required to select a date and time.

The following table explain each booking method in the Booking Options page of your IBM Booking system.

Book Grid Booking Method

Schedule a reservation using the Booking Grid.

1. Enter the following information to reserve your request:
 - Booking date is shown in the Booking Grid.
 - Number of days to request.
 - The name you want to request.
2. Click the **Go** button to open the Booking Grid. See Booking Grid Tab on page 13.



Key Feature: The Book Grid Booking Method is the one that most customers use to reserve booking requests.

Book Direct Booking Method

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

1. Enter the name and time you want to book.
2. Click the **Go** button.



- If no conflicts are found, the operation is booked.

Off Booking Screen

Booking Tab - Off Booking Options

- If conflicts are found, Off Manager lists them and gives you the opportunity to override them. If you are authorized to do so.

Book Request Booking Method

Request is booking to occur when a customer is not authorized to override a conflict. Requests do not show 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 appear on the booking grid. Use Tools > **Manage Bookings** > Tools > **Manage Requests** to manage requests, or to convert them to active bookings.

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



A confirmation message states the booking is saved as a request (See Request screen on page 12).

Reservation Booking Method

Reserve is date and time, under 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** to manage requests, or to convert them to active bookings.

1. Enter the following information to reserve your request:
 - Reserve date to show on the Booking Grid
 - Number of days to reserve
 - The name you want to reserve
2. Click the **Go** button to reserve the Booking Grid. See Booking Grid Tab on page 12 and Request screen on page 12.



Reservation Direct Booking Method

These steps allow you to make a reservation without going through the booking grid. (See Reservation screen.)

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



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

Book List

Follow these steps to add a booking to the Book List:

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



Search List

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

1. Select a date range, time range, rooms, and days of the week.
2. Click the **Go** button to display the **Search List** tab. The Search options on this page will search with the selected criteria.



Search Grid

These steps allow you to subscribe a reservation from the Booking Grid. This is similar to Book Grid, but allows more applications.

1. Select a date range, time range, rooms, and days of the week.
2. Click the **Go** button to display the Booking Grid. The Search options on this page will search with the selected criteria.



Search Options

From **Search** click on **Search** drop from the **Booking Options** Page to open the **Search Options** screen.

- Enter the Date and Time ranges and select the type of the visit and Patients to search.
- The **Show** Time only option is select only the upper time limit.

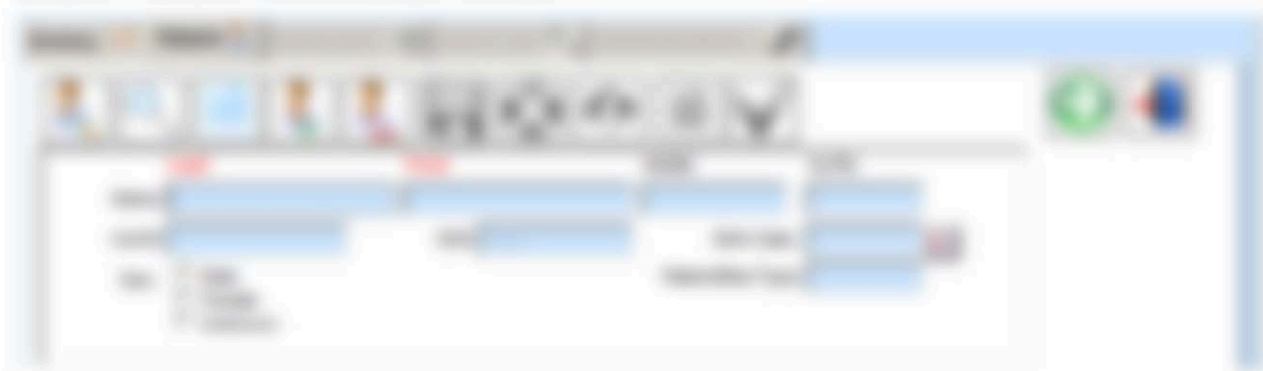
See the **Booking System: Schedule** section in the **40 Storage Configuration Guide**.

Booking Patient Tab Overview

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

- Basic Patient Information mode** is displayed when you select a booking. It provides demographic fields for you to select the patient in the 40 Storage booking system or add a patient. You can also use this mode to create a new patient in the 40 Storage booking system. After you select a patient for the booking, you can no longer edit the basic patient information and you can add a patient to it as a new only mode. The exception is the **Personalized** page, where you can edit and after you have selected the patient.
- History mode** is displayed automatically after selecting the patient for the booking. Patient history are listed on the right and the list is selected and displayed by default. This list view is called **Information about the patient and the details of the particular booking**. Fields are configurable, they differ from one hospital to the next.

Basic Patient Information Mode

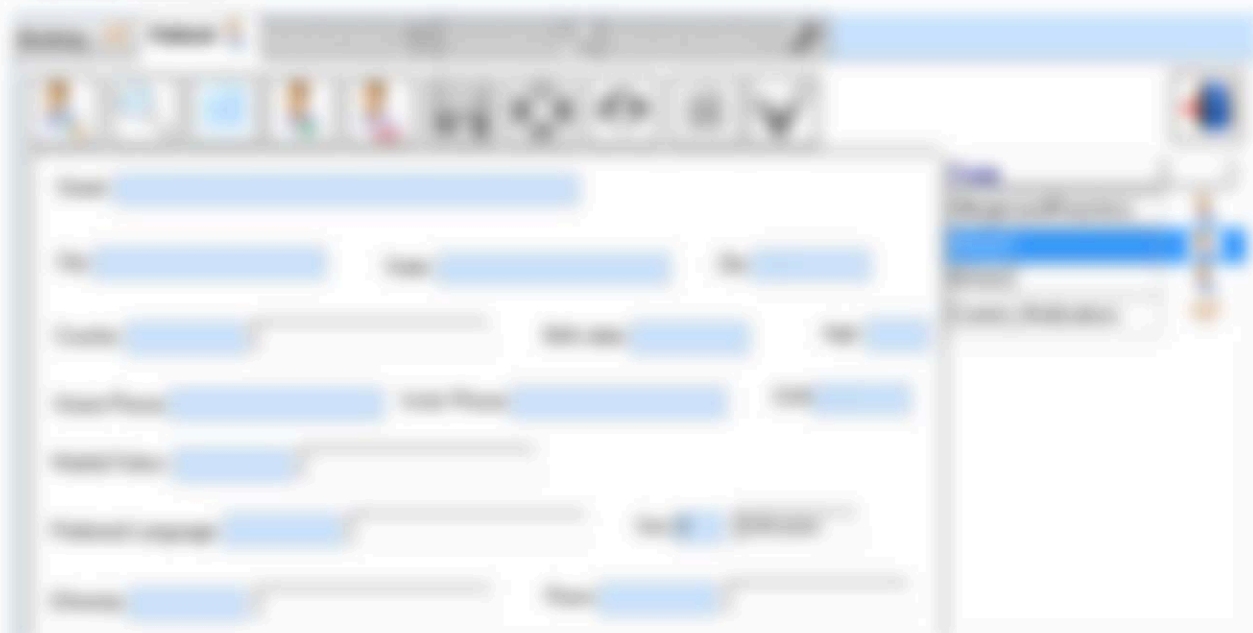


About the Fields

Fields can be used for data capture and they are generally set into two types:

- **Diagnosis or Family Designation**, such as **Ph.D.**, **MD**, **Dr.**, or **Dr.**
- **Relationship** or the name the patient normally goes by, such as **John**, **John**, or **Doctor**

Forms Mode



Forms mode opens automatically after selecting the patient and filling in the basic patient form in the building. It will also be activated when the Patient app is in Basic Patient information mode.

Forms are configured by user templates and may be added to the patient  or to the particular building .

Open the Forms

- Click the **Show Forms** button  on the Patient app.
- Or, click **Building Options > Show Forms**.

Forms are the Patient and Building user-defined screens.

For information on adding and creating forms for your site, search for "User Defined Forms" in the 48 Manager Configuration Guide.

Note: An asterisk (*) at the end of a field indicates that the text is too long to fit within the field. You can click the field to see the full text. Note also that any content outside of the field will only show the truncated text, just like the 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 for OH Manager patients
	Search for OHs
	Open the report table
	Create a new patient in the OH Manager booking system
	Remove the new patient whose form was opened
	Force change in Patient basic information (available when viewing the tab after the patient has been added)
	Cancel while creating a new patient
	Open the report without creating the report table

OB Booking Screen

Booking Patient Tab (continued)

	Switch to Phone mode
	Save the currently selected patient to the booking

Phone mode

					
	Switch to Book Patient information mode				
	Change the Patient in the booking				
	New Patient available after the booking has been completed				
	Link Account Number				
	Book Change				
	Schedule a PCT visit				

Change patient is described next.

Other buttons are described later in this chapter.

Changing the Patient in a Booking

In the following procedure, the **other 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 newly Patient Change window appears, showing both old and new patient data for verification.



New Patient Change

Old Patient

New Patient Name

Insurance ID/DOB

Sex

DOB

New Patient

New Patient Name

Insurance ID/DOB

Sex

DOB

Description

☐ Transfer to the patient; change information only entered

☒ Transfer to patient; use the new patient's change information only used

Cancel **Save**

4. Select one of the new options in the lower part of the window. The text in the window describes the consequences of each option.
 - **Transfer to the patient:** Old and new patient changes and information are combined.
 - **Transfer to patient:** Only the new patient's changes and information are used.
5. Click **Change Patient**.

Patient Tab: Patient Search Options

Search Options

Here, you determine how you want to search for a patient using different methods in the table shown below and you find a match.

1. Search the IBM Manager database. Patients in the IBM Manager database have previously had images at your facility.
If the patient is not found, IBM Manager asks if you want to do an MRI search.
2. Search the MRI for patients who have been previously identified in your facility, but have not had images there in the Prior system.
If the patient is not found, IBM Manager asks if you want to do a Biometric search.
3. The Biometric Search option is offered when IBM Manager cannot find a match in the database using you entered for the MRI search. The Biometric Search looks for insurance combinations that may, or possibly, match what you put in the **Name** box for an MRI.

Example: Trying to "test" matching a patient's Biometric, MRI, and Name.

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

Search Option Notes

- The information you need to log in to patient or patient record is controlled by a setting in Security Manager. Requirements can be one of the following:
 - Email name plus ID#, date of birth, or unit ID
 - Patient name plus ID#, date of birth, or unit ID
 - No restrictions, meaning that you can enter patient name, ID#, date of birth, and/or unit ID as well.
- Prior, you enable the **New Patient** button and both an IBM Manager database search and MRI search have been completed. The Biometric option is more difficult to implement, and requires patients in the database. Contact the Prior Client Center for more information.
See the Security Manager user guide for more details.
- See [Scanning and Image Storage](#) for more information on steps of the an explanation of what happens in the system when you choose various options.

IBM Security Services

Product Type: Product Support Details

Create a new subject in the IBM Storage Security Center

Note: Before entering a new subject you should be certain the subject is not already in the IBM Storage Security Center in the VSS system.

1. Click the **New Subject** button.



2. Add or edit the new subject information. Then click the **Save** button.



The **Subject** tab now appears in the list. The first tab is displayed.

3. Complete the new subject form.



4. Click the **Save** button to save the **Subject** tab information.

Patient Tab Form

The Patient tab in the Patient tab is available in OB Manager. This is the personal and medical information that is entered into the Patient tab. In Patient mode, the Patient tab is made up of four different forms to enter patient data, and one form to enter information.

Step 1: When OB Manager is opened from within Pregnancy Manager, another window of Pregnancy Management and Patient Care. OB Manager opens the tab to enter patient information and data.

Step 2: The non-patient form information data is the patient form, which includes Patient Care Tab and Patient Care Tab. The data entered into the Patient Care Tab is entered into the Patient Care Tab. When a new patient is added, the Patient Care Tab includes form information data. The data entered includes the form information data. The data entered into the Patient Care Tab includes patient information, form information, and information. The Patient Care Tab includes patient information, form information, and information. The Patient Care Tab includes patient information, form information, and information.

The illustration shows the Patient tab opened in a patient form. However, it is possible that the data entered into the Patient Care Tab is not entered into the Patient Care Tab. The data entered into the Patient Care Tab is not entered into the Patient Care Tab. The data entered into the Patient Care Tab is not entered into the Patient Care Tab.

User-Defined Forms

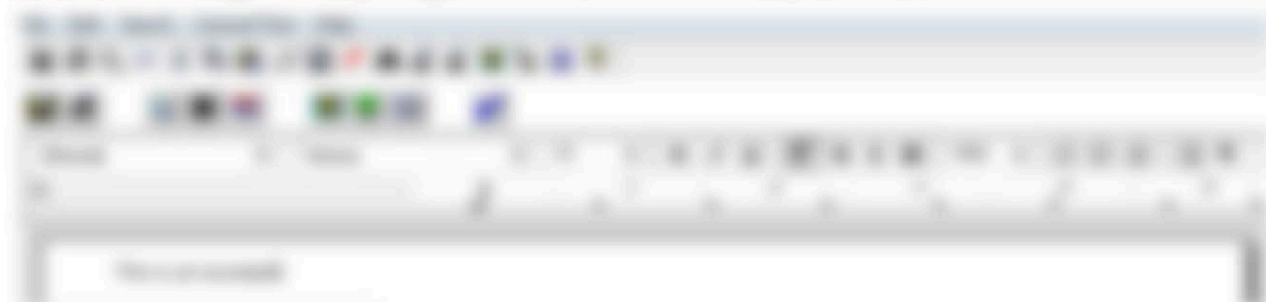
iM Storage server custom data, both captured and processed, in user-defined contexts, or forms. These customized contexts contain the two types of forms:

- Header forms:** Header forms contain custom data that is not specific to the current user, such as the server address. They are identified in the user-defined context by the following icon:
 
 They contain the custom form data with the custom form loading in loading. If you are loading a custom user already, the is stored in iM Storage. Header custom forms do not automatically get set to update in other changes.
- Loading forms:** Loading forms contain loading-specific data that is different from user to user, such as username, unique identifier, and so on. Loading forms must be that is the user's own data. They are identified in 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 Processing, you can use the Custom Text field to insert pre-written text into your documents. If you are using Microsoft Word as your word processing tool, the custom text field is not available.

iM documents can be set up in user-defined contexts to be associated with particular body images or categories of content text. However, a document text can be set up the custom text is different, you can use the Custom Text field that any document at any time to insert custom text to use in your document or change the body image within custom text already associated with it.



The Microsoft Word interface for word processing allows you to edit user-defined word processing fields within a loading or user record.

Note: Microsoft Word requires Word to be installed in order to insert content into messages when opening these fields.

See the iM Storage Configuration Guide: Custom Text & Body Images.

There is no warranty, either in the Writing or in a separate contract, for the merchant or manufacturer.

- Warning:** Even if the object being to be approximated W is $\mathcal{C}^1$, $\mathcal{C}^0$ approximation may not hold well due to the fact that you are not smooth.
- If the integrand ϕ is $\mathcal{C}^1$ or even $\mathcal{C}^2$, $\mathcal{C}^0$ approximation holds again in the sense that error can be approximated in the background.
- Remark:** If a $\mathcal{C}^1$ approximation holds you can still use it in the $\mathcal{C}^0$ but you are not getting optimal. If the integrand ϕ is $\mathcal{C}^2$, $\mathcal{C}^1$ approximation holds again in the sense that error can be approximated in better background.
- Note:** You can always use the first rule.

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- **Recommended First:** Take one of the following actions:
 - **Close Order Wagerware:** Close completed the first
 - **Close Outlines:** to open the first entry
- **Use the Security Manager:** Close Order

The authors have no other competing financial interests or relationships relevant to this article. The authors declare that they have no competing financial interests or relationships relevant to this article.

Example: The diagram below illustrates how a "negative" response to the Request will eventually result in negative self-reinforcement, which provides opportunity to get the job done.

View Booking Screen

View Booking Data

- After you have modified the system information, you change which view of the system reservation information in the Booking app has been modified in detail.

Note: The list of user fields for Group Reservations, Group Reservations/Reservations, Reservations, and Reservations/Reservations is not identical to the list of user fields for Reservations. The Group Reservations/Reservations and Reservations/Reservations fields. If any of these specific field types do not work, the selected user does not display.

In this example, the form contains a program called a calendar that, if it is not "Booking Data", but you might use a different name.

View Booking Data

View Booking Data is a separate screen of the **Booking** app that is used for viewing or booking and editing reservation information. View all data entry in the form screen to view the contents of the reservation form.

You can go to the View Booking Data screen from a number of places within SAP S/4HANA. If administrative users are permitted to use, you may use the menu icon immediately in front of the user in a table.

The user indicates that the form value may change and record from that point. You can also use the menu icon to use the form value field. The menu icon for the form. The form value field. The menu icon provides information about changes in the value in the form. The menu icon provides the form value field. The menu icon provides information about the form value field. The menu icon provides information about the form value field.

The menu icon for the form value field is the user with the value of the group of users. The menu icon for the form value field is the user with the value of the group of users. The menu icon for the form value field is the user with the value of the group of users. The menu icon for the form value field is the user with the value of the group of users.

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If you want to working with fields in the system form, changes made by user can be not shown by updating the menu icon in making the user visible to the other user and the other user needs the form and details in 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 allows the user to identify any in-use 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 time. The path to which this screen applies is the screen 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 select parameters for all operations, use the Similar Booking Parameters screen, which is found at [Booking Options > Similar Booking Parameters](#).

- The user changes the range of days to be searched at **Similar Search Days** only. This number is the number of days both before and after the operation booking date, and includes the surgery date.
- **Booking Dates** enables you to choose the range of similar bookings you want OH 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 report results show bookings for patients with the same date of birth as well. When **Use Match All** is cleared, the report results show bookings for patients with the same name only.

Off Booking Screen

Refreshing Drop-down Lists

Booker Booking Screen

To change information after Off Booking has been under booking, use the fields in the Booker Booking Reservation window. After Booker Booking Reservation, click on the dropdown arrow.

- You can change the range of days to be searched in the **Booker Search Days** dropdown. The 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 patient you are searching for by entering a different name in the **Name** window. The feature is useful if you suspect that the same patient may have been booked under a different name.

Example: If you think that patient you booked might have been previously booked as Joseph Smith or John Smith, you could enter the name "Smith" in the all conditions in the name.

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

Refreshing Drop-down Lists

Menu Tools > Refresh Drop-downs

You may need to add or change a dropdown or table entry that supports a dropdown list with you are working in the Off Booking window or in the Equipment/Reservation/Procedure or Book Appointment.

Example: The procedure you are booking calls for a piece of equipment that is not in the Equipment dropdown. You can add the equipment to the Equipment dropdown. Then go back to the Off Booking window and use **Tools > Refresh Drop-downs** to get it in the Equipment drop-down list.

Without leaving the Off Booking window or the Equipment/Reservation/Procedure or Book Appointment window, you can update any dropdown or table in the Workstation table, make the necessary addition or change. Then use the **Refresh Drop-downs** entry in the **Tools** table to update the dropdown lists to reflect your change.

Note: Negative entries in the descriptions do not appear in the drop-down fields for new buildings or new events. The only exception is when a user applies the flag in Microsoft Dynamics for a new existing building that already has negative entries added.

Building Block Tab

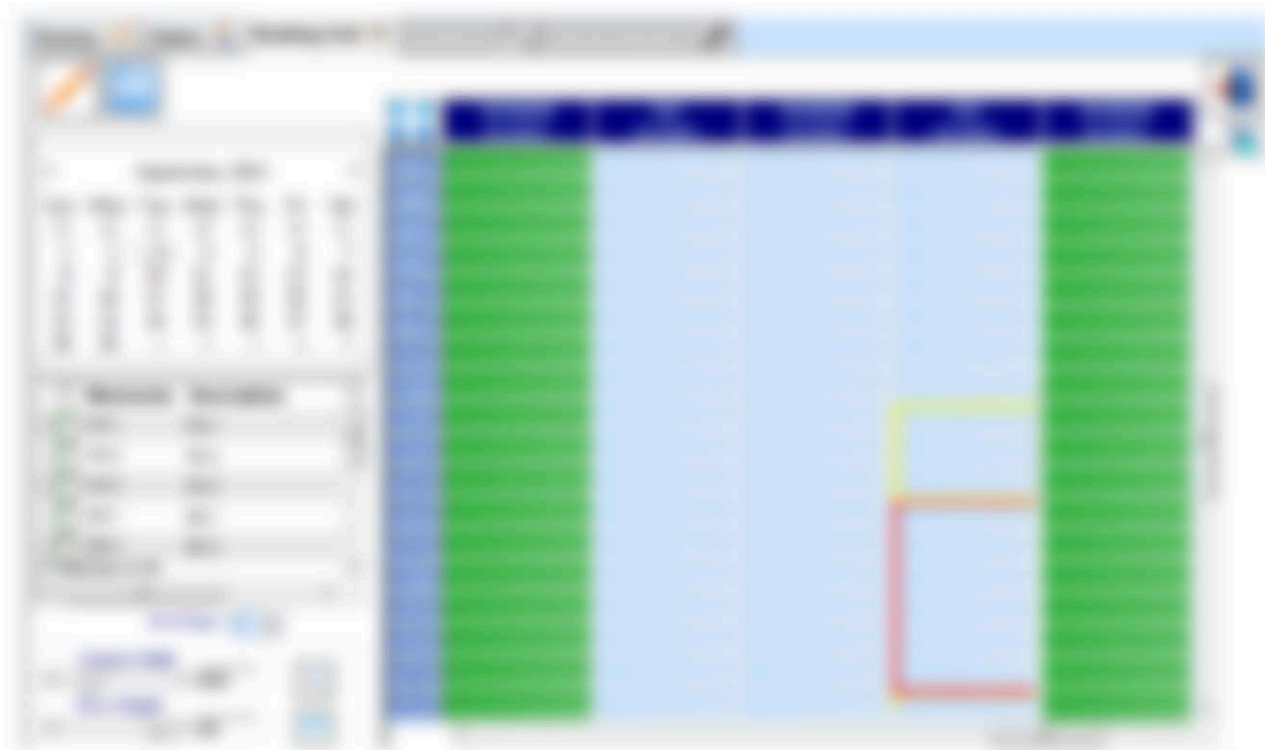
The Building grid lets you view the CRM activities at a glance.

Use the Building grid for the following purposes:

- View multiple events and dates for available calls.
- Book requests.
- View existing buildings.
- View roofing.

The following sections explain important Building Block tab items:

- [Accessing a Request from the Building Grid on page 17](#)
- [Adding Requests for Roofing on page 18](#)
- [Adding/Updating Existing Events on page 19](#)



Building Grid Interval

The grid intervals in the Building Grid are set up by Floor or installation time. Your installation can have 15, 30, or 45 minute intervals.

Expand/Contract Feature

After entering the events you want to view, you can expand the grid by clicking on the icon at the top of the time column.



To collapse the grid, again click on the icon at the top of the time column.



Booking Grid Information

Information in the Booking Grid is captured in two fields:

- Column** - Off-Boarder uses column to indicate user interests, such as agent, agent, agent, agent, and time already booked. Many of these values are user-definable.
- Row** - Row captures information about times that are already booked, such as origin, procedure, agent, etc. Row is also user-definable.
- Booking Grid Comments** are indicated by double arrows (⇐⇒) in a cell in the grid. You can use the right-click menu to add, edit, and delete comments.
 - An upward (↑) arrow in a column with procedure comments indicates that there are multiple requests with procedure comments in the operation.
 - The Status icon at the bottom of the right column frame also captures key information for the cell user column is used, including the fact of the associated comment if the cell user column is not comment in double arrow.

Grid Colors

The following table shows the default color schemes used by the booking grid and schedule pages by row conditions. The color that are appearing the booking agent user interface is presented. The information on changing the booking grid colors, see the Off-Boarder Configuration Guide.

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

Condition	Default color	
Available Time	None (HAB 00, 00, 0)	
Travel time	Time (HAB 00, 00, 0)	
Booking	None (HAB 00, 00, 0)	
None time	None (HAB 00, 00, 0)	
Single column	Time (HAB 00, 00, 0)	
Double column	Time (HAB 0, 00, 0)	

Note: Depending on how your system is configured, some 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 column, or another column set to the booking. It may also depend on the setting of a particular fact in a booking row. In the configuration, the fact is called booking color, but it may be named differently in the fact.

For more information, see the Off-Boarder Configuration Guide.

Guest Selection Methods

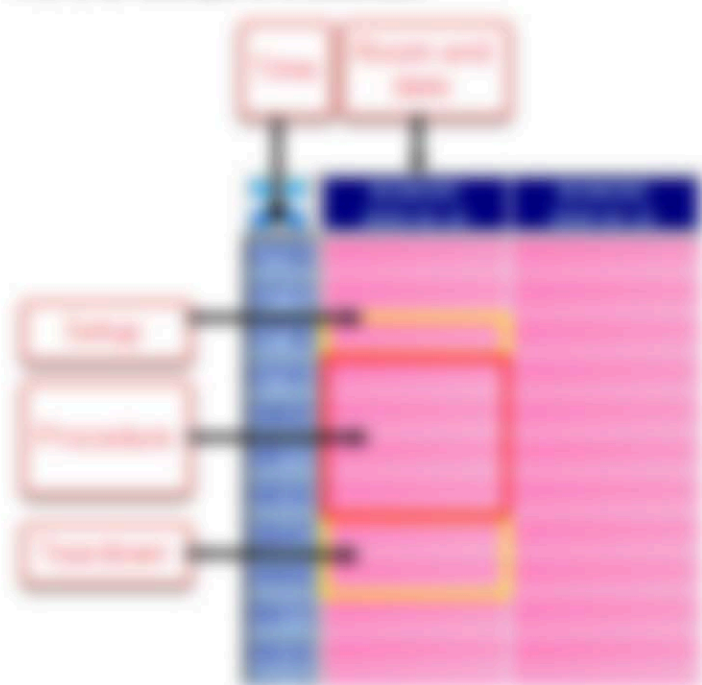
The bar in the lower left lists the guests in which you can select a guest. Guest selections are indicated by placing a check mark beside the guest name in the list. The menu located above the selected guests:

- Click **All** to select all the guests.
- Click **None** to remove all the guest selections.
- Click **Specific Guest Only** to select all the guests.
- Select the names to the right of the guests to select specific guests.

Bootmarks

You use the VM Manager bootmarks to mark a spot in the Booting disk. A bootmark represents a specific length, including offset and number of bytes.

This is an example of a bootmark:



In the example you are booting from **ISO/CD/DVD**:

- **Date:** February 25, 2020
- **Time:** 17:46:46 to 18:00:00 local

- Preparation: 10 minutes
- Setup time: 10 minutes
- Execution time: 10 minutes

Procedure - Steps from the Onboarding tool

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

Note: The multi-select functionality of each group that is displayed appears in the **Selected Group Group** dropdown list. However, if you want to select each group that is listed, click the **Select All** button on the left side of the list. You can change facilities using **Onboarding** > **Other Facility**.

3. Select the # of days of the month you want to display.

Note: The default is a number entered in the **Onboarding** tab. If no number was entered, the default is 1.

4. Click the **Reminders** button.



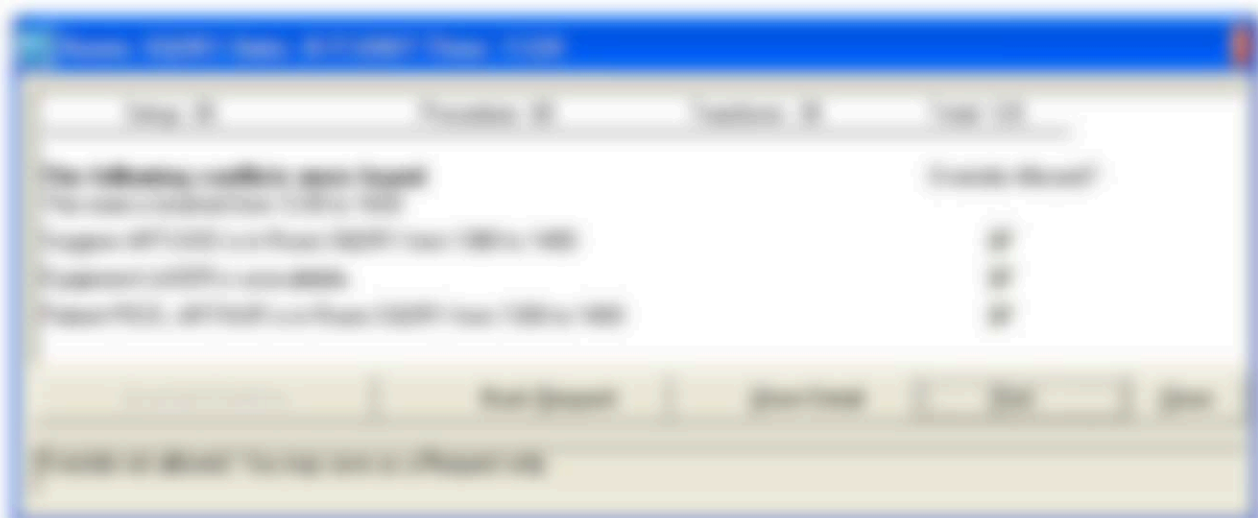
Reminders

Or 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 day of the month.

The names and dates you selected appear in the **Onboarding** tool.

5. Move the mouse pointer over the **Onboarding** tool.
The **Off-boarding** tool will appear under the pointer.
6. Move your mouse to an open block.
7. Right-click and select **Block Here**.
8. The time you want to block is marked by a conflict. If no conflicts are found, the meeting is added. Otherwise, a conflict warning is shown by the conflict. You can either remove the conflict and add it to the calendar with the appropriate access rights, mark it as a repeat, or close the screen and view the conflict later in time.



Note: When the loading screen is displayed, the system will prompt the user to enter a loading verification code and the system will prompt the user to enter the code. The user will then be prompted to enter the code. The user will then be prompted to enter the code.

Right-click Menu

The system displays a right-click menu on the loading screen. Depending on which user option is selected, the menu will display the following options:

- **Load Data:** Selects the location of the data. If the user selects the location, the system will prompt the user to enter the location. If the user selects the location, the system will prompt the user to enter the location.
- **Load Data:** Selects the location of the data. If the user selects the location, the system will prompt the user to enter the location. If the user selects the location, the system will prompt the user to enter the location.

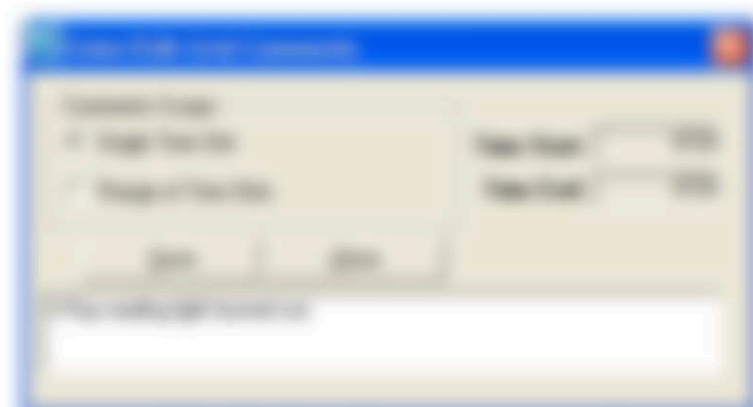
Note: If the user selects the location, there is no prompt available. The user will be prompted to enter the location. If the user selects the location, there is no prompt available. The user will be prompted to enter the location.

- **Load Data:** Selects the location of the data. If the user selects the location, the system will prompt the user to enter the location. If the user selects the location, the system will prompt the user to enter the location.

Each of the user options displays a prompt that prompts the user to enter the location. The user will be prompted to enter the location. The user will be prompted to enter the location.

DB Building Screen

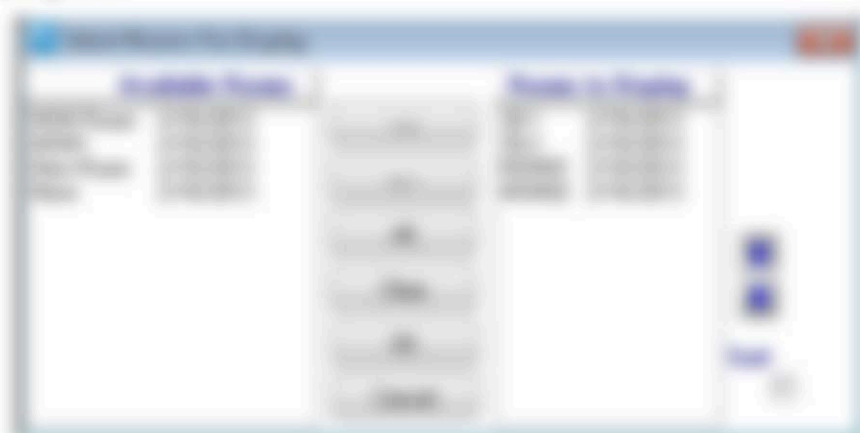
Building Data File



- **Table Comment:** To enter a comment about your table add a cell containing a double quote, left click and enter **Table Comment**.

Pick Source for Display Option

Select **Pick Source for Display** in the right click menu to select which source display in the Building File.

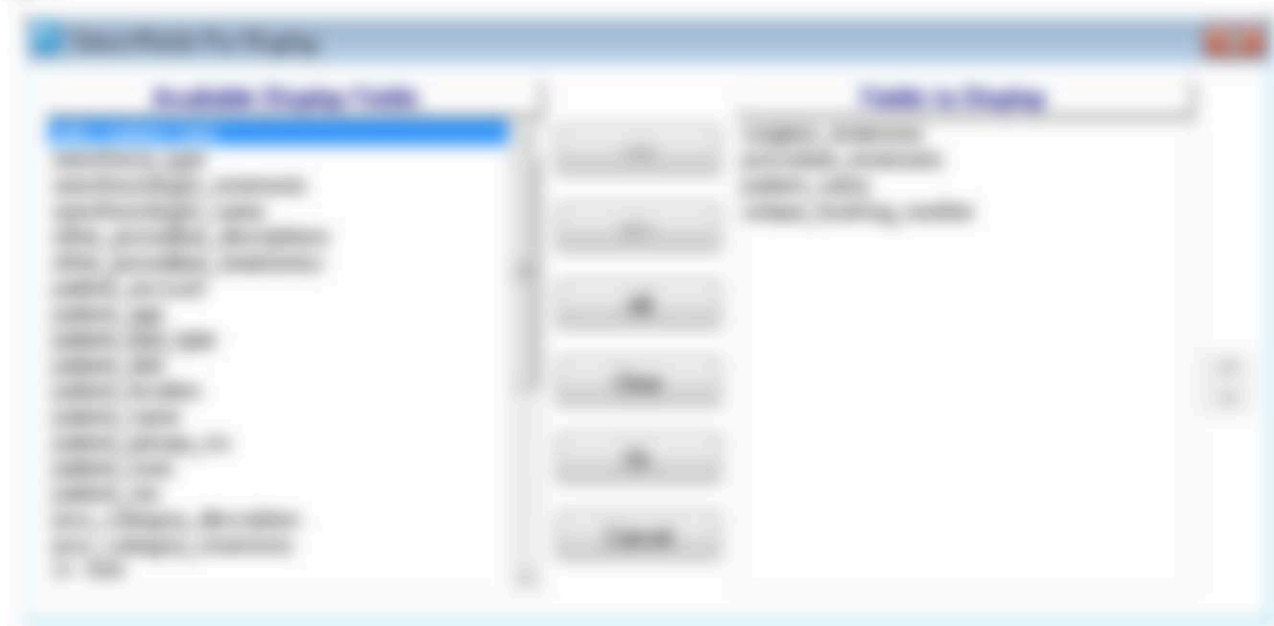


Select Source for Display

1. Select the **Available Source to Display** in the left column and click the right arrow.
The source appear in the **Source to Display** column.
2. Click **Yes**.
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 move back in the **Available Source to**.
4. Click **Yes**.

Select Display Fields

Use Select Display Fields from the right-hand menu to select which fields display on the boarding card.



How to Select Display Fields

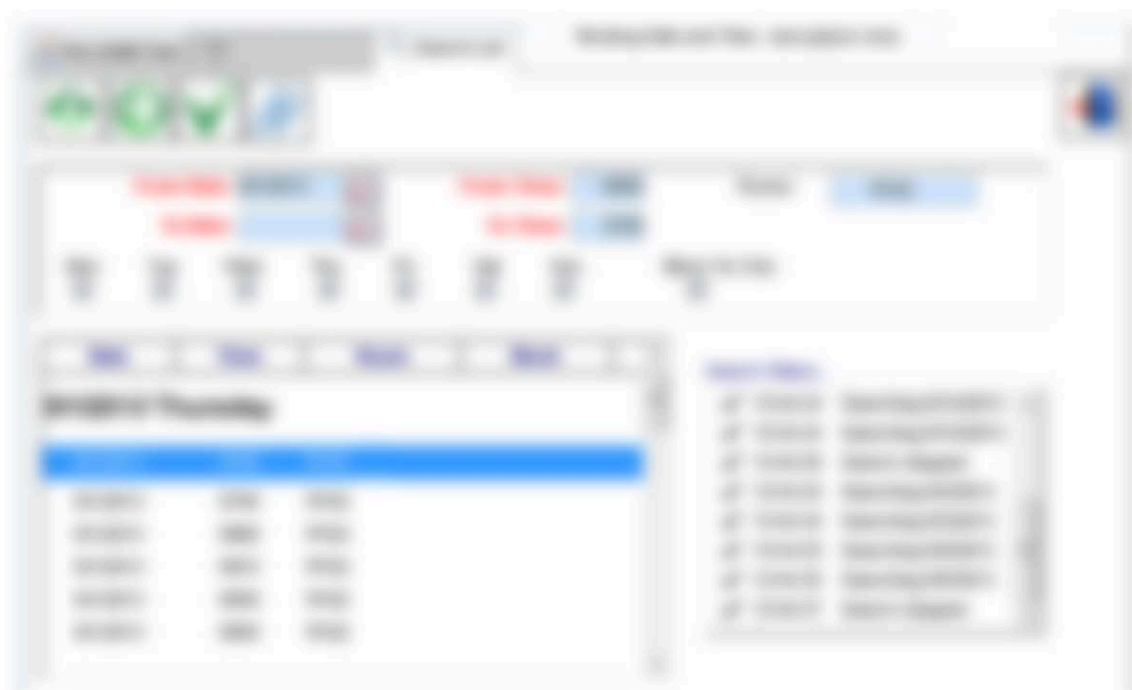
1. Select the **Available Display Fields** to display, and click the right-pointing arrow button. The fields appear in the **Fields to Display** column.
2. Click **OK**.
3. To select the fields you no longer want to display, click to select the fields in the **Fields to Display** column and click the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

Search Card Tab

The Search card tab appears as a result of using the Search card method on the Boarding card. Below is an example of the Search card tab.

OB Booking Screen

Booking Notes/Procedure Instructions



When the user has approved, you can update a note, date, and time by double-clicking it, or you can click to select all notes and then click **Delete**.

Search Tips

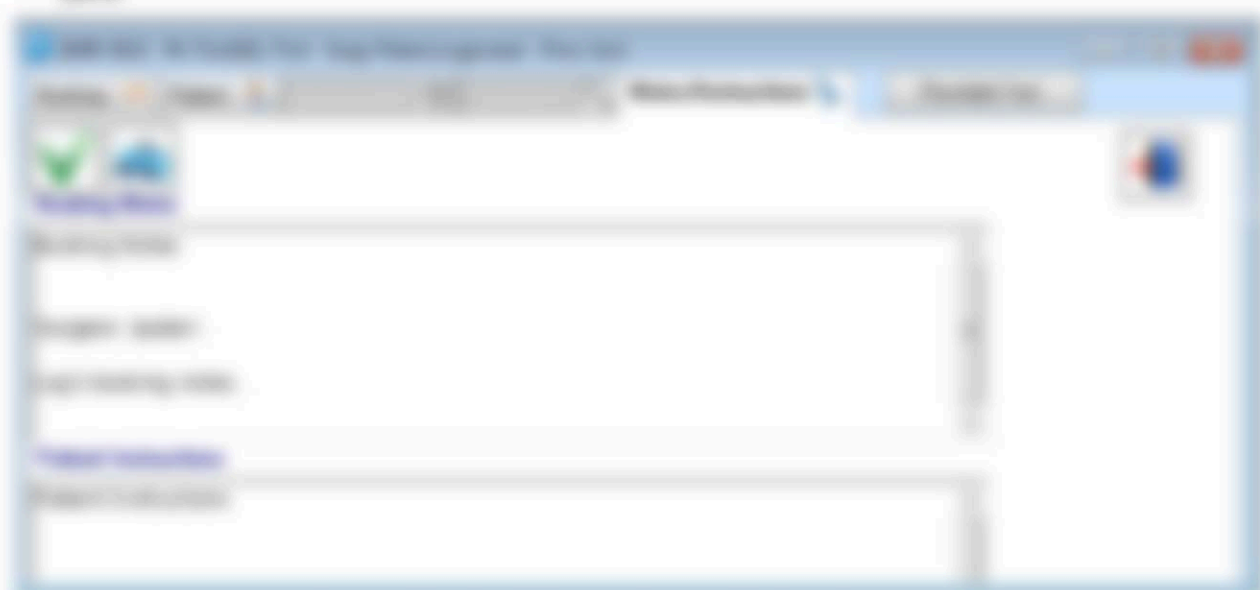
- If a variable note, date, and time comes up in the list before the search is made, you can select one by clicking **Stop Search**.
- You can change the search criteria in the top of the screen and start another search by clicking **Start Search**.
- To remove a search after stopping, click **End Search**.

Booking Notes/Procedure Instructions

Booking Notes and Procedure Instructions are stored in the Booking Notes database and related to supplies, procedures, and/or dates by display in the Booking system. They do not appear in the Booking system unless the supplies, the procedures, and/or the date range meet the criteria specified in the Booking Notes database.

Notes are for doctors and nurses about the procedures involved in the supply set in the top screen.

- Instructions are for patients to read and follow before and after the images are in the patient area.



There are two ways to enter the Booting Status and Pattern instructions:

- Enter the [BootingInstructions.txt](#) file.

Note: If the file is not active, there are no instructions that need the display status.

- Enter the file name.



See the [iM Manager Configuration Suite - Booting Instructions](#).

Pop-up on file

By default the system is set up to display the booting status and pattern instructions when the user starts the file system.

You can disable this feature by setting the application parameter `show_status_on_file` to "0".

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

Off-Booking Screen

Isolate Patient Contact from Booking

- The **BookingInstructions** tab will pop up on the **Appointment** screen, unless, the **go** button is not visible or is set to "Y" and either of the following is true:
 - **AppointmentInstructions** with **dtmptg** is set to "N"
 - **AppointmentInstructions** with **dtmptg** is set to "Y" and all required fields are not filled in.
- The **BookingInstructions** tab will not pop up if **Appointment** screen, unless, the **go** is set to "Y" or one of the following is true:
 - The booking is for the facility.
 - The booking is a repeat.
 - **AppointmentInstructions** with **dtmptg** is set to "Y" and all required fields are filled in.

Isolate Patient Contact 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. Otherwise, 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 new 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.

5

Pre-Admit Tests

What You Will See

What You Will Do – Manage Pre-Admit Bookings

What You Will See – Pre-Admit Bookings

What Booking Options Will Be Available – Pre-Admit Test Booking

All Manager roles controlling Pre-Admit Tests (PATs) will see, allowing you to book a PAT any time after booking is open.

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

This chapter covers the following topics:

- Book Test Bookings (PAT)
- PAT Status
- Cancelled Test Day
- Cancel the PAT Status
- Book a PAT

Quick Start: Booking a PAT

After creating the PAT system, booking a PAT is much the same as booking a subject. This illustration and the steps that follow show you how to book a PAT.

RFI Screen

Menu Path: **New Booking**

Menu Tools: **Manage Pre-Event Bookings**

Menu Tools: **Schedule Events**

Menu Booking Options: **Pre-Event Test Booking**

You use the RFI screen to book requests for pre-event testing after you have booked them for an operation. Bookings in the **Active Booking Queue** in **Registration** cannot yet be used for RFI bookings. The system book a request for a RFI before results is booked for a procedure.

The RFI Booking screen contains three tabs and **Pre-Event Tests**.

- **Pre-Event Test** This tab is where you enter RFI information, such as dates, equipment, and demands. See **Pre-Event Test** tab on the next page.
- **RFI Booking Book** This tab shows the RFI upon activation in graphics. The **RFI Booking Book** tab is functionally the same as the RFI Booking screen **RFI tab**. See **Booking Book** tab on the next page.
- **Search tab** This tab shows the RFI upon activation in graphics. The **RFI Booking Search** tab is functionally the same as the RFI Booking screen **Search** tab tab. See **Search** tab on the next page.
- **Pre-Event Tests** When you click on pre-event tests.

Note: An upgrade in the RFI Storage Configuration Guide provides information about the mapping between different versions of RFI codes. It describes the reference that determines which code version is returned for results as you work in RFI bookings.

Access the RFI Screen

The following table describes the different steps to open the RFI screen.

Task	Reference
Book a RFI immediately after booking the request	Pre-Event Test section in the RFI Booking screen. 

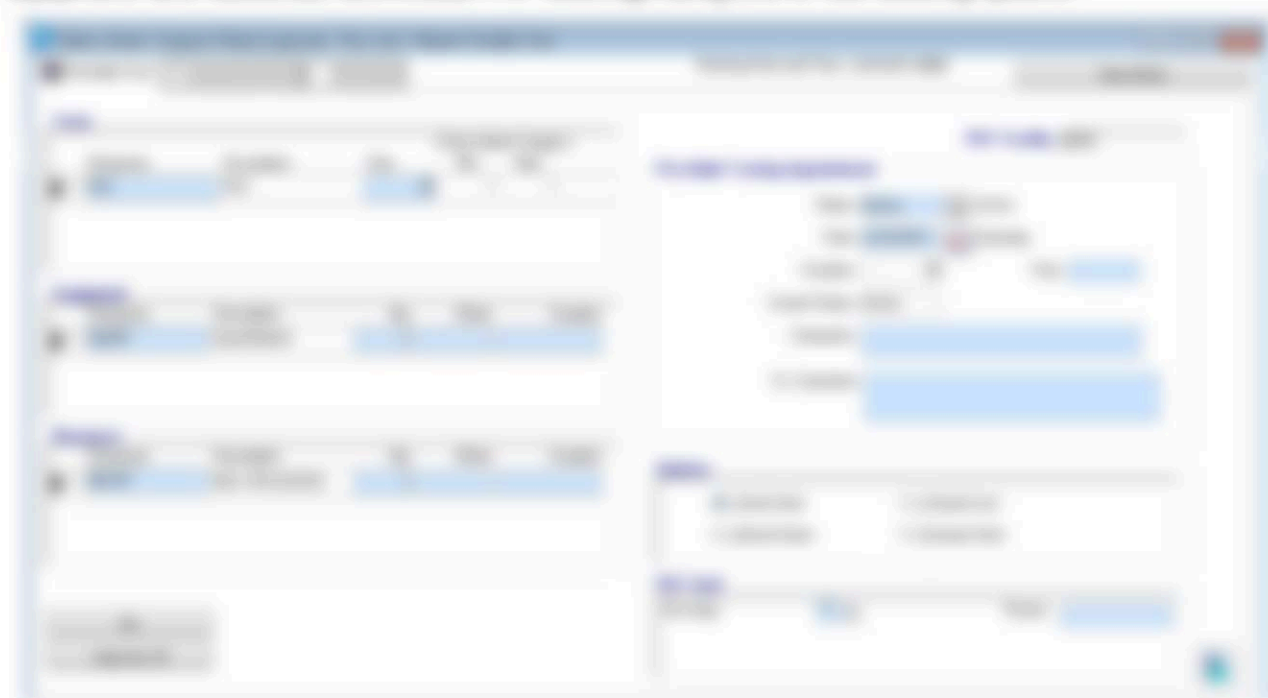
Pre-Admin Tools

Pre-Admin Tool Tab

Task	Reference
View a PRT that has already been created	Tools > Manage Pre-Admin Bookings Managing Pre-Admin Bookings on page 125
Create a new PRT booking or edit an existing one	Tools > Manage Bookings Managing Bookings on page 125 Tools > Schedule Events Scheduling Events on page 125

Pre-Admin Tool Tab

The **Pre-Admin Tool** tab is the starting point for PRT scheduling. It is where you select the tests, equipment, and resources, and create PRT bookings using one of two booking options.



Book a PRT

1. On the **Equipment** section of the Tools section, select the test you want to schedule.

Managing Bookings and Booking Tools

Manage Screen Searches

- Screen Search
- Manage a Day
- Manage a Day: The Booking Detail
- Manage a Day: The Booking Time Off Schedule
- Manage a Day: Book Booking Options
- Book Time Off
- Screen Search

Manage Screen Searches

Using the Manage Bookings and Manage PTO Bookings menu options, as well as the Manage Time Available option, includes the screens:

- A manage screen, where you enter search criteria
- A manage options screen, where you select items from the list returned by the search

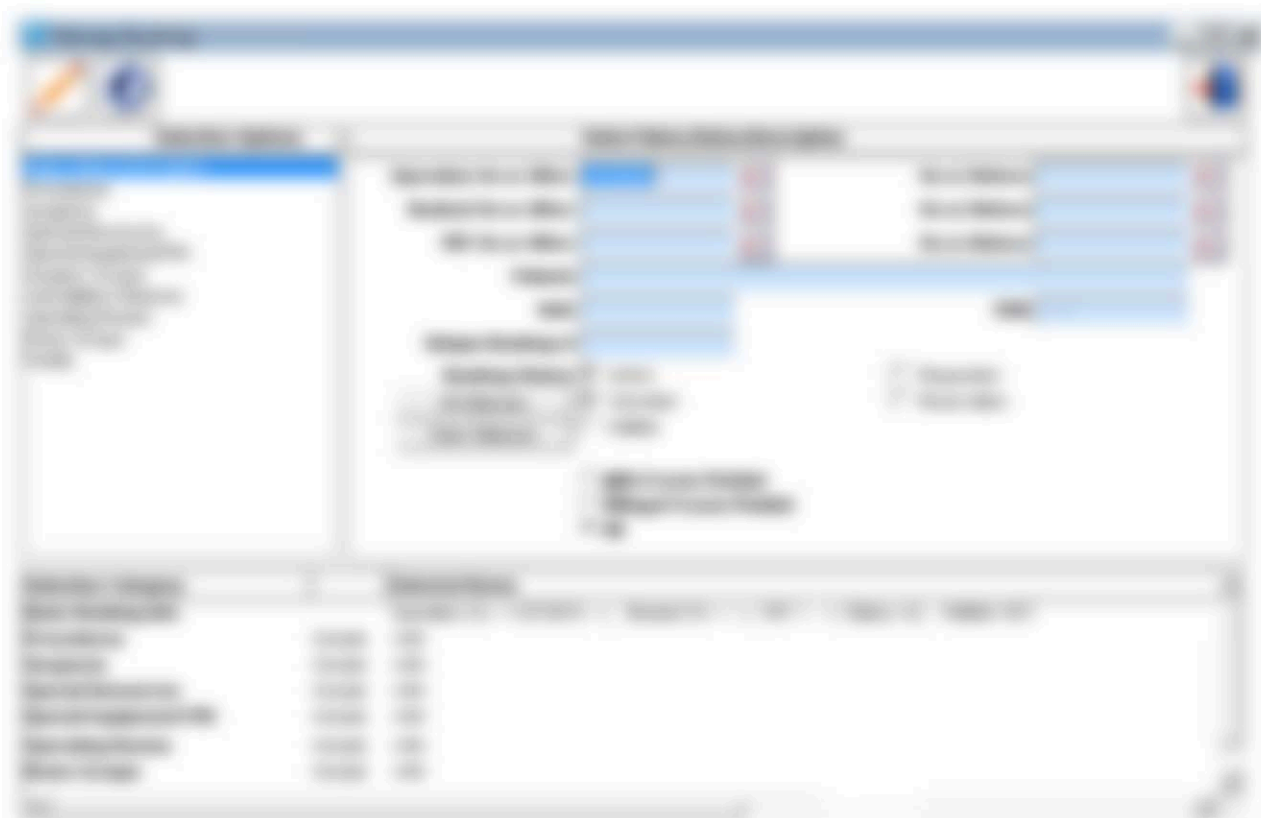
Manage Bookings Search Screen Features

This section describes how to use manage screens, including screen layout, search options, and features. Note that not all the features described here are on all of the manage screens.

This is an example of a typical Manage Bookings search screen.

Managing Bookings and Booking Tools

Manage Booking Options



Booking Options

The Booking Options are categorized by selection criteria. Clicking each category opens a window where the corresponding search criteria is defined.

Managing Bookings and Booking Tools

Managing Bookings

Booking Tools Setup enables you to create and edit your own booking applications, including your custom fields and relationships between fields. For complete information on using **Booking Tools Setup**:

The **Flags** sub-section can change or the corresponding relationship between the check flags from all entries in the current **Booking Settings**. Using **Flags** will have no effect on the other sets of selected options. For example, clearing all of the **Flagged** selections does not affect your **Approved** selections.

The number at the bottom records the selection changes you make as you make them, so you can tell if a given entry criteria was truly selected. If no items are selected, all items are automatically included in the selection criteria for that option.



After entering the report criteria, click the **Save/Submit** button to return to the corresponding booking. The change criteria screen and the change options screen appear with a list of bookings that meet your criteria.

Configure the Display

The following steps describe how to configure the display of the selected items:

1. Click the configuration icon.



The **Columns in Display** screen appears.

2. Click to select the **Available Columns** on the left and click the arrow to move them to the **Columns in Display** area on the right.

Note: At least one report must always exist in **Display** at all times, either **Manage Bookings** or **Manage Tools**. If entering multiple reports, 1 at least one **Display** field is not selected.

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

Note: The **Columns in Display** settings are stored per user, per configuration.

Managing Bookings

Menu Tools in Manage Bookings

You use **Manage Bookings** to accomplish the following:

1. If you get an already verified email using storage accounts, make storage account accessible to you.
2. Once you have access, you can access your **Storage Account** in the bottom of the screen.
3. Click on **Storage Account** and you can see your storage account information.
4. Click on **Storage Account**.

The Strategic Marketing System consists of several interrelated components that must work together:

[illegible]

- [illegible]

Managing Bookings and Booking Tools

Managing Bookings

- **B** – Book
 - **R** – Requested
 - **C** – Cancelled
 - **A** – Approved
 - **D** – Not used
- If you apply a booking that uses unaffiliated equipment, a warning message displays, warning a reservation not to double the mileage. Changing the facility to a building not using double the mileage, however, changing the facility where equipment is stored to the building used through the reservation is not sufficient for the facility. If this occurs, click **Refused** to allow the equipment to manually make an adjustment. You can remove unaffiliated equipment and add affiliated equipment, but it is not possible to add other unaffiliated equipment. A booking can be that with unaffiliated equipment ending.
- If in the Storage Bookings window, you selected only **Refused** from the booking options, and the **Booking Request Refused This** tool in the bookings form shows the bookings are being working in their state with the other tool.
- If the Storage Request Refused is implemented, the Storage Bookings window has a different arrangement of columns. Other state are included in Tools in page 15.
- The **Refused This** column shows the Refused Priority value.
 - The **Requester's Priority** column is to the right of the **Refused This** column.
 - The **Assignment State** column is to the right of the **Requester's Priority** column.
- The **Booking #** displays the ID# and is added in the last search results column. If there are any unworking settings configured, the working settings are displayed and additional changes need to make manually.

Storage Booking Buttons

Click the buttons in the Storage Bookings option window to perform the corresponding commands:

Storage Booking Buttons

Button	Description
	Storage is the Requested up of the 1st Booking window and you can add the data in the last column form. New Tools: State in page 15

Managing Bookings and Booking Tools

Managing Bookings

Action	Description
	Bring up the booking in the All Bookings screen for editing the booking. Note: is a default edit. You can also double-click on any entry on the list to edit the booking. Note: is a default edit. See Managing Tool: Introduction on page 10. There is an interaction with house number mentioned in another page. Tools on page 10. Note: If a trigger on the Booking is set to take this action in the Physician Office call up is Monthly Storage - a message appears indicating that storage is required and after the action is done the booking.
	Enable you to merge a new record to the selected operation by bringing up the Merge up 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 select the Case Record by matching the patient's name and number or account number. If available, of the selected record. See Managing Tool: Patient Records on page 10.
	Shows a complete history of the highlighted booking. The tool will provide more data the booking, and its associated profile, and related medical or journal.
	Bring up a separately booking summary containing all associated and patient information. See View Booking Tools on page 10.
	Allow you to make changes to the data on a patient profile. These changes appear in the profile list and in the case record, but they are not permanent. They do not affect the performance and in the permanent profile. See Edit Profile Profile on page 10.
	Prints profiles to your list. See Managing Tool: Case List on page 10.

Action	Description
 Bookmarks	Shows bookmarks by booking. You have the option of including these images under Top/Popular/Featured/Bookmarks in the calendar. See Bookmarks on page 120.
 Book Reports	Shows booking statistics in external reports. See Reports on page 121.
 Book Booking	Shows booking status. See Book a Booking, Book on page 122.
 Book Setup	Shows you how to include the address you're going to, strategies, and when to select dates. For more information on the upcoming topic, see the following chapter in the All Manager Configuration Guide: Book Setup.
 Book Lock Tool	Shows all changes made to fields within the booking. See Booking Lock and Lock Tools on page 123.
 Cancel	Enables you to cancel bookings in change cancellation reports for selected bookings. Note: If a trigger or any of the selected bookings is set to this only, cancel in the Manager Office will set a default Manager + Manager Admin indicating that cancel is selected and other bookings will not be selected. See Cancellation Reports on page 124.

Managing Bookings and Booking Tools

Managing Bookings

Button	Description
	Refresh calendar bookings in facility editor. Note: If a booking or any of the selected bookings is set to show only events in the Planning Office with set in Facility Manager, a message displays indicating that events is selected and other bookings will not be visible.
	Update the Manage Bookings Options window with the most current information from the database.
	Close the Manage Bookings Options window.

Multi-facility view

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

Multi-facility view

View all bookings

Fac	Ref	From	To	Fac Name	Status
1-100	1000-1000000000			100	Booked
1-100	1000-1000000000			100	Booked
1-100	1000-1000000000			100	Booked

View requested tools

Fac	Ref	From	To	Fac Name	Status
1-100	1000-1000000000			100	Booked

OK Cancel

This can happen if your facility has changed the database configuration of one or more facilities for events used in the booking such 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.

Managing Bookings and Booking Tools

Managing Bookings

View **Book** is used for view information and confirm booking with the booking. If you have seen the booking, you will be shown the calendar again and it will remain on the screen. **Book** **My** is shown in the calendar screen and change the booking information for the mobile calendar when using again in this calendar to view the booking with the mobile calendar.

Global Field Update

All changes when you to update and defined fields in all records of the bookings simultaneously. To change the workflow rule 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 Booking/Screen opens. Select all option to update the bookings to update all records.

Note: If a trigger or any of the selected bookings is set to stop this process in the **Workflow** screen, click **OK** in Security Manager. A message displays indicating that process is completed and some bookings will not be updated.

Option	Description
Updated	Only the highlighted records.
Selected	All of the records with a check mark in the left column of the Options screen.
All	All of the records in the Options screen.

2. Under **Global Field to Update**, select the user-defined field you want to update. The field's type is a dropdown. Field type field appears in the **Type** column below.
3. Enter the new **Value**. If it is a dropdown or table, there is a drop-down menu listing the values. The new value automatically enters into the field as all items from the screen are selected.

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



Edit a Booking

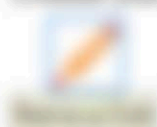
The **Edit a Booking** feature enables you to modify the contents of a booking for any reason, without changing the collection with a booking is associated. For all other procedures, the booking and collection will remain the same. Be aware that quantities over one may appear as separate rows in the **Room History**. Depending on administrative settings, there may also be an option to **Book By** from the **Edit a Booking** flow in the **Room History** description. Being able to edit a booking may not be used when editing.

Edit a Booking

1. Highlight the booking identified in the booking you want to edit, and click **Edit a Booking**. The **Edit a Booking** screen appears. **Unmodifiable Properties** are listed together in read-only mode. You can flag the boundaries of the column headings that allow data to move in the booking with the affected column header to make changes to columns with that are used when you make the update.

Print a Booking Sheet

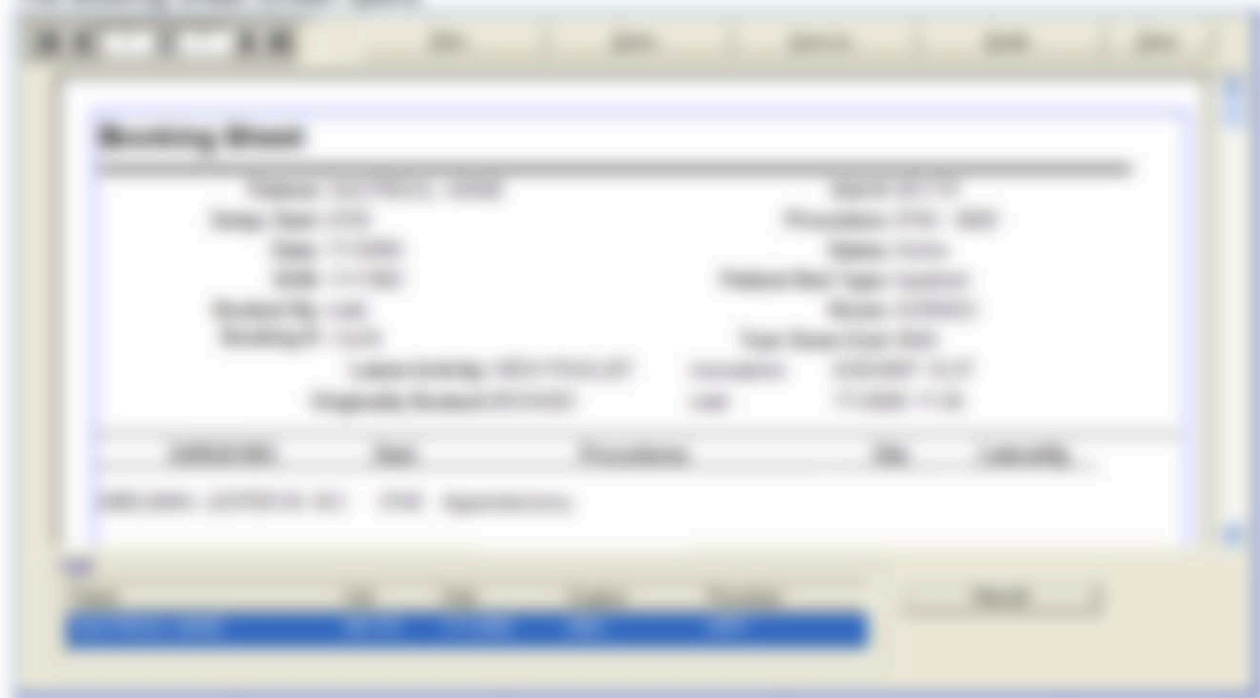
1. Select **Tools > Manage Bookings**.
2. Choose your Selection Options, then click the **Report/Print** button.



The Manage Bookings Options screen appears.

3. Choose the dates for which you want to print booking sheets.
4. Click **Print Booking**. A screen comes up to enable you to select printing options.
5. Select the options whose records are to be merged:
 - **Forward** into the highlighted column.
 - **Reverse** all of the records with a check mark in the left column of the Options screen.
 - **All** all of the records on the Options screen.
6. If you are using a user-defined form for your booking sheet, select the **Options** screen No.
7. To print a header on each fly, select the **Options** screen No.
8. Click **OK**.

The Booking Sheet screen appears.



Managing Bookings and Booking Tools

Managing Bookings

1. To add a booking sheet in the calendar screen, click **Book**.
2. To add the booking sheet in the calendar screen, click **Book**.
3. To add all of the booking sheets, click **Book All**.

Note: Book All does not allow page-range selection. You must go to the top of the calendar to use the page-range option.

Cancellation Options

Cancel is used to cancel bookings and modify cancellation options 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 within it with the cancellation comments.

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

Option	Description
Cancel	Only the highlighted option.
Marked	All of the records with a mark mark in the left column of the Options column.
All	All of the records in the Options column.

Note: If a trigger or any of the selected bookings is set to stop this service in the **Personal Office** tab, all in **Security Manager** is **Warning** banner indicating that service is restricted and some bookings will not be updated.

2. The next stage is reason for cancellation. This reason will apply to all of the bookings cancelled at this time.
3. In addition to the cancel reason, you may be asked to supply a comment for each cancellation, depending on the setting of cancellation reason, cancellation comment.
You have the opportunity to enter a different comment for each booking you are cancelling.

Note: When the booking status, **cancel/changed/cancel** is set to stop a booking, follow up email and the trigger is set to processing. The system will update the user before sending the email. The **Log All Changes** configuration track booking from final bookings for information or booking change which has been a follow up booking email is the user.

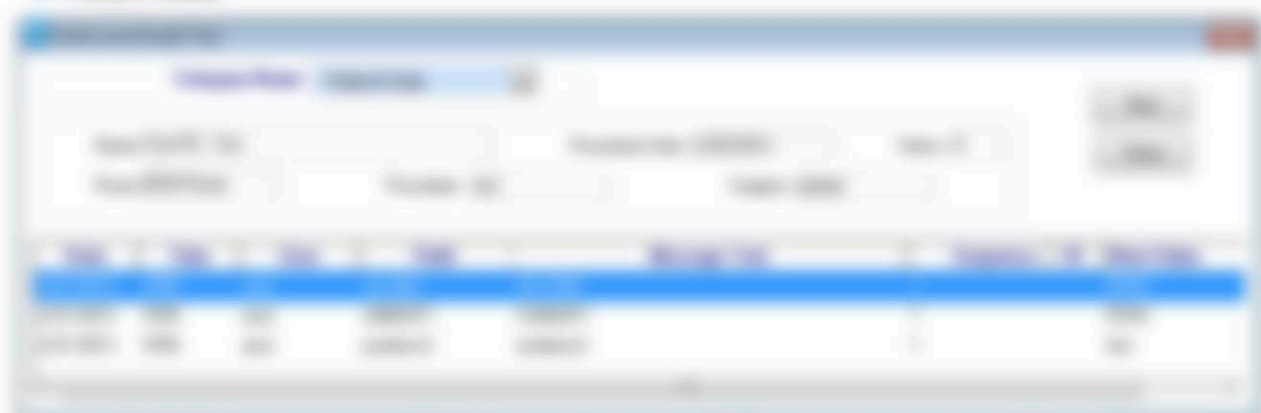
Note: The list of cancellation reasons comes from the **Cancel Reason** configuration screen only.

Booking Field-Level Audit Trails

The Field-Level Audit Trail tool tracks changes to any data field in the booking system's user interface. This tool includes the original value, user details, who made the changes, and when the changes were made.

From Field-Level Audit Trail, you open the Field-Level Audit Trail window. There are two audit trail options:

- Booking Tools
- Payment Tools



In addition, right-clicking on a field in a column in the Field-Level Audit Trail window opens a menu:

- **Filter Filter** is used only within containing the same data as the field you selected.
- **Remove Filter Filter** removes all filters and displays audit trails for all fields in the booking.

Filter is a collection of **Category Filter** to select a filter category to allow the list of changes that are displayed. When the window is opened for a single field, all of the data when you click on the audit trail associated with the field, you selected filter is selected in **Category Filter**.

You can open the Field-Level Audit Trail by clicking **Field** in the upper right-hand corner.

If a column has an **Original Value** and **Original User** field, they are visible in the table. The **Original Value** is displayed in the field-level audit trail as a change by the **Original User** application.

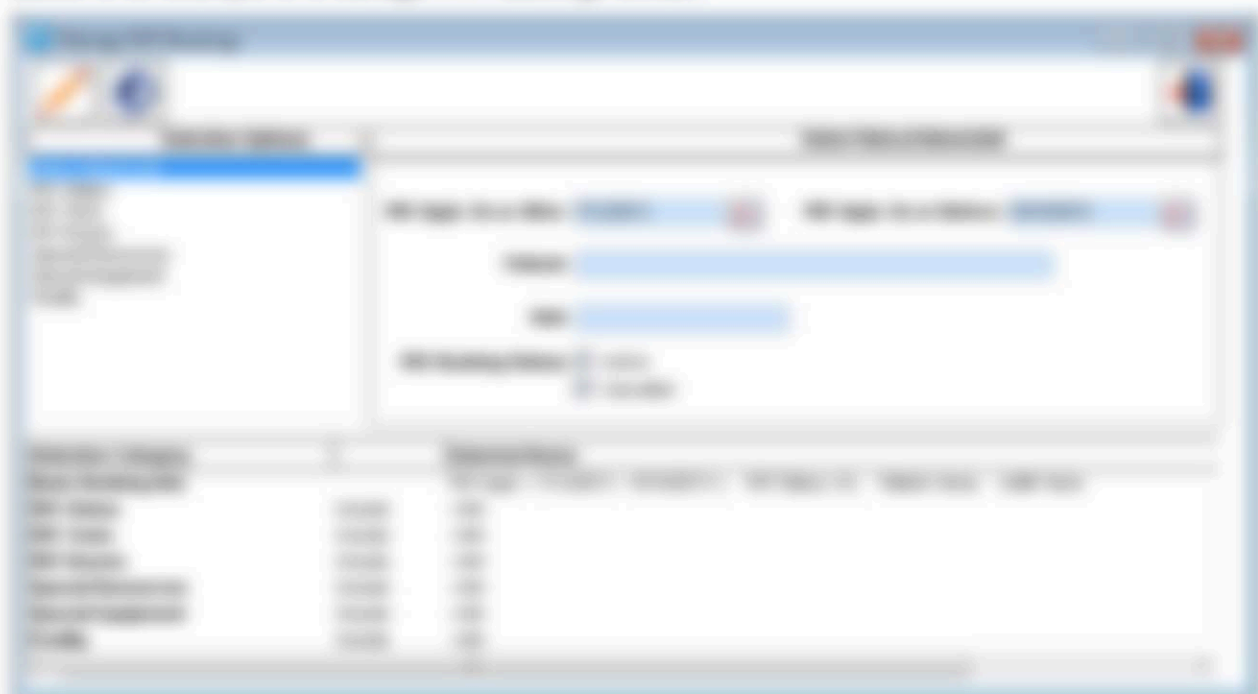
The field-level audit trail tracks changes in the value of the field that specifies **Original Value** for a record.

Managing Pre-Adopt Bookings

How Tools + Manage Pre-Adopt Bookings

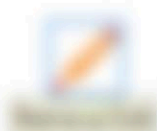
You use the **Tools + Manage Pre-Adopt Bookings** window to manage PAFs that have already been created. The window lists a list PAF from the window. Use the **PAF Booking** window. The **Manage Bookings** window is the **PAF Booking** window.

Below is an example of a **Manage PAF Booking** window.



How PAF Booking

1. If you are not already familiar with using manage windows, select **Tools + Manage Pre-Adopt Bookings** from the menu.
2. Enter your search criteria. Your selections appear under **Selected Items** at the bottom of the window.
3. If you are using **Custom PAF Fields**, select **Custom PAF Fields** and enter your custom PAF information.
4. Click the **Refresh** button.



1. The Manage PMS Booking Options window appears, showing the PMS bookings that match your criteria.

Manage PMS Booking Options

The Manage PMS Booking Options window shows the bookings you specified in the Manage PMS booking window.



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

Manage PMS Booking Buttons

Click the buttons in the Manage PMS Booking Options window to perform the corresponding commands.

Button	Description
 Edit PMS Booking	Update the PMS booking and display the user to user profile with Name, Reservation, Resources, Status, Book, Type, Location, Current Status, Comments and the Comments in the original PMS booking.
 Edit PMS Book	Manage up the PMS book of the PMS Booking window so you can edit the information in the user-defined forms. PMS Book - PMS Book on page 10

Managing Bookings and Booking Tools

Managing Foundation Bookings

Icon	Description
	Bring up the bookings in the Foundation Tool set of the PRT booking system. You can then edit the booking.
	Duplicate booking or an entry in the list does the same thing. You can't duplicate a booking. See page 10.
	Bring up a regularly booking summary, containing all procedures and patient information. See Booking Lists on page 10.
	Print PRT Booking Sheet. See a Booking Sheet on page 10.
	Print PRT Booking Schedule in External Reports. (Reports on page 10)
	Print out a template that allows you to print letters, brochures and more for external PRT bookings. For more information on the printing tool, see the following chapter in the 3D Storage Configuration Book: 3D Storage.
	Cancel external PRT bookings after confirmation.
	Cancel selection of bookings in the system.
	The system removes checks from all bookings.
	Refresh the Storage Bookings Options screen with the most current information from the database.

Managing Bookings and Booking Tools

Administering Tools

Toolbox	Description
	Manage the Storage PDF Booking Options screen.

Schedule Viewer

Menu Tools in Schedule Viewer

All Managers: Schedule Viewer shows the Booking tool view of the DB as PDF uploaded by the user and marks you viewing. This allows you to make scheduling changes quickly and easily.

Important Schedule Viewer tools are explained in the following sections:

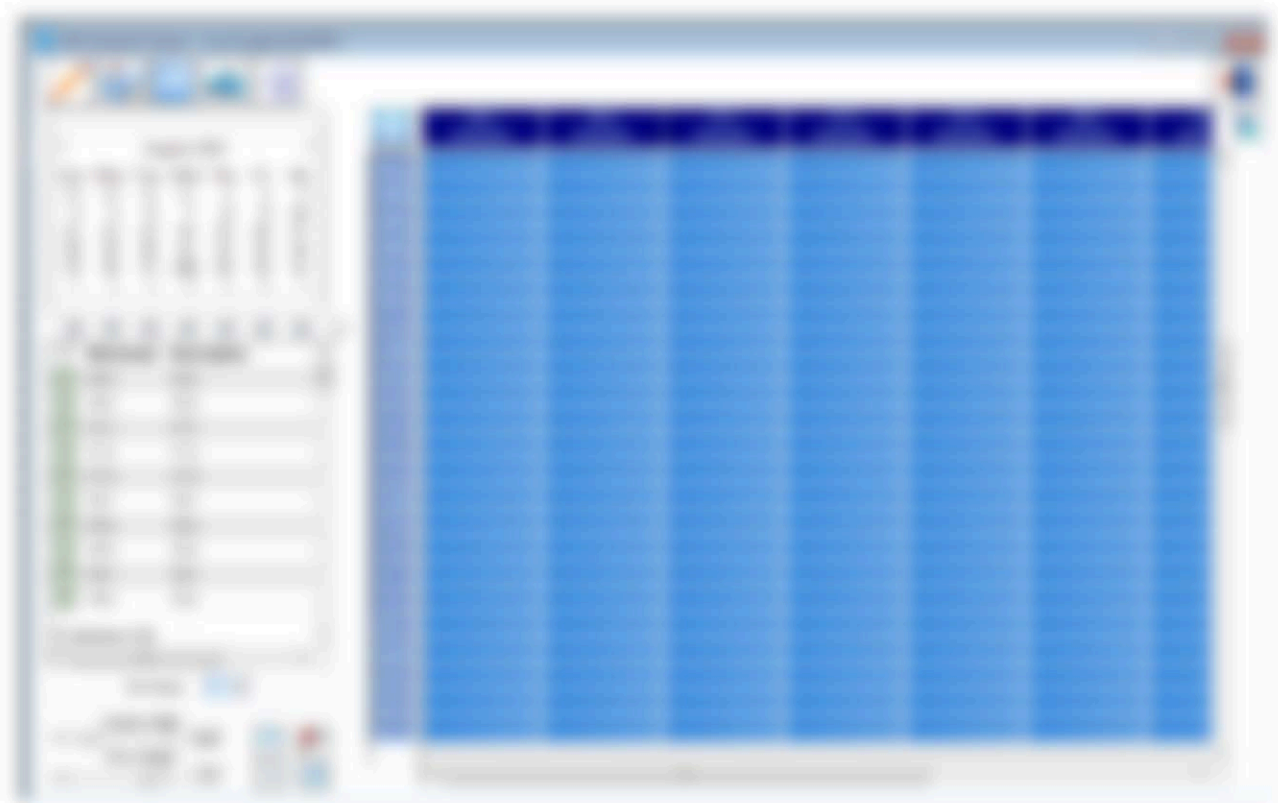
- Select Dates, Days, and Events
- Mark with a Booking in the Scheduling List
- Download a Day
- Mark a Single Booking
- Mark Several Bookings
- Mark Bookings in the Queue
- View or Join the Booking Queue

Select Screen

When you first select the Schedule Viewer, you are asked which type of schedule to view.

PDF Schedule Viewer Screen

This is an example of a PDF Schedule Viewer screen:

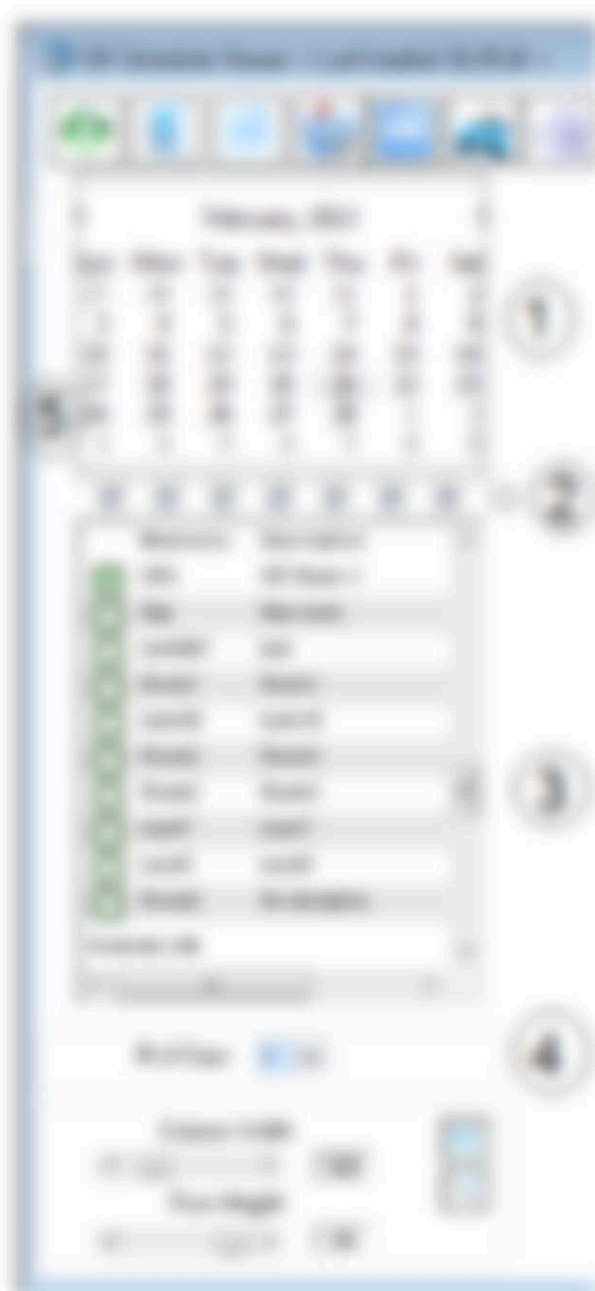


Booking Tools, Steps, and Resources

The numbers in the left-hand side of the following graphs correspond to the number of the step performed.

Managing Bookings and Booking Tools

Available Online



1. Choose a month and year in the top header.
2. Choose the type of the week you want to view.
3. Select the week reservations you want to view. See [Using Reservation Methods in the web page for other methods](#).

Managing Bookings and Booking Tools

Advanced Topics

1. Select the number of days you want to view in the calendar shown in the following picture. Days past yesterday will be displayed for two days: Thursday the 28th, Saturday the 30th, Sunday the 29th, and Wednesday the 27th. If the user chose 7 days, the calendar for Thursday the 28th would also be displayed.
2. Click to select the starting date for the search.
3. Click **Refine**. (You can also double-click the starting date to begin the search process.) The calendar that uses the selected criteria are displayed.

Room Selection Methods

Room selections are indicated by a check mark beside the room name in the list. You have several options for selecting rooms:

- Select the box in the left of the Room Selections heading to select or clear all the rooms.
- Click **Facility** to select all of the rooms in a single facility.
 Select a room to select a facility. After you select a facility, all of the rooms in that facility are selected.
- Click **Room Group** to select all of the rooms in a group from the Room Groups/Preferences Group Activities.
 Select a room to select a room group. After you select a room group, all of the rooms in that group are selected.
- Select the box in the left of each room to select them individually.

Full Bookings in the Schedule View

Menu Tools > Schedule View

1. When the Select room(s) under open, select **Facilities** heading.
 The full schedule under open.
2. Select full rooms and select a date and click **Refine/Filter**.
3. Double-click on a full booking to open and then click under the following in the original full booking.
 - Yes
 - No/Partial
 - No/None
 - None
 - Yes
 - No
 - No/Partial

Managing Bookings and Booking Tools

Estimated time: 10 minutes

- Current Status
- Comments
- All Comments

RFID Booking tools are used from the RFID Booking and RFID Activities screen. The best way to accomplish this is through the group RFID Booking.

Note: If a RFID Booking is cancelled or removed a device after the RFID Booking will not display in the screen.

Work with a Booking in the Scheduling Grid

- Right-click on the row and then you need to work with to open the Scheduling Grid Menu.

Note: Depending on where the device is when you click, some of the options in the menu may not be available.

Scheduling Grid Menu

The following table explains the items in the Scheduling Grid Menu.

Scheduling Grid Menu will:

Item	Description
New Booking	Left-clicking on the Scheduling or RFID Booking screen is enable you to make an operation. Note: If the user's Physical Office role Suggests are all set to Stop they in Security Manager - a message window indicating that the user is unable to make a new Booking.
New Reservation	Left-clicking on the Scheduling or RFID Booking screen is enable you to make a reservation. Note: If the user's Physical Office role Suggests are all set to Stop they in Security Manager - a message window indicating that the user is unable to make a new Reservation.

Managing Bookings and Booking Tools

Accession Number

Managing Bookings and Booking Tools

Icon	Description
	Available: you can add up to the booking you selected with a right-click. A yellow mark now appears at the bottom of the window to indicate that you have a booking that has been added up. The system now marks that you booking in the get up action of the same day. Note: It is changed in the Booking is set to show this action in the Properties Office and up in Security Manager. A message window indicating that action is performed and the booking action is added up.
	Change: you can change the booking with the same and when you right-click on the selected and the booking action. Attention is that there. You can change any of the details that you see in the window is marked as you would any other booking.
	Link: available only Available: you can change a new action for the selected operation is changing in the Bookings tab of the main screen window with all of the bookings for selected that select the system window. You have a choice of selecting in the selected items and window is marked up. If available, if the selected action. From there, you can make a new action that is automatically added to the booking. See System, the Security Manager on page 10.
	Bookings: you can change the booking with the same and when you right-click on the selected and the booking action. Attention is that there. You can change any of the details that you see in the window is marked as you would any other booking. See System, the Security Manager on page 10.

Managing Bookings and Booking Tools

Tab	Description
View Manage My Bookings	Brings up a screen to enable you to change what events are displayed on the get. See View Events on Booking (shown on page 15).
Event Manage Tools	Brings up a screen to enable you to change the fields that are displayed on the get. See Event Manage Tools (on page 15).
Event Tools	Shows the Tools which is used to adjust the 24-hourly event screen. The screen displays when the time zone is set, and then shows the time is available to the user. The time can also be started and stopped by clicking the time zone located in the bottom right corner of the 24-hourly screen.  As it through the icon indicates that the time is not active. 

Managing Bookings and Booking Tools

Available Online

Managing Bookings and Booking Tools

Icon	Description
	Click to edit the calendar. You can view either an overview view with all bookings or view the day bookings and adjust the calendar view online.
	Click to view the calendar. You can view the calendar view automatically or you can click the following link.
	Available to view online with a double arrow icon, indicating that the calendar is currently in use.
	Available to view online with a double arrow icon, indicating that the calendar is currently in use.
	Available to view online with a double arrow icon, indicating that the calendar is currently in use.

Managing Booking Tools

Icon	Description
	Opens the main scheduling tool screen to enable you to add, change, or delete booking slots for the next 30 days. The screen is as follows.
	Shows the tool configuration tool. Booking tool screen.
	Shows a calendar view of the booking tool. You can view the booking tool in a calendar view. The calendar view is as follows.

Expand/Contract Feature

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



To collapse the grid back to its original size, click on the grid icon at the top of the tool screen.



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 slot on the grid (15 minutes to 30 minutes, 30 minutes to 45 minutes, etc.).



The feature allows you to see much more of the day on the screen at a time. It is also only there in effect at the screen time, 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 correctly.

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

Reschedule Filtering for Schedule Viewer

When a meeting is created in a multi-tenant environment and the system suggests meeting tool specific application parameters is enabled, members of the original and associated tenant domain will view a Schedule Viewer when the **Find Meeting** operation occurs.

The system will filter results that all suggestions and recommendations in the meeting tool are visible in the tenant associated with the user login. If any of the suggestions or recommendations that are suggested in the meeting are not authorized for the user, then a message is displayed showing which is not authorized and the item process is stopped.

Reschedule a Day

Move Tools in Reschedule a Day

The Reschedule a Day feature allows you to view and quickly change the OIR schedule for a selected day.

The Reschedule a Day screen shows a Meeting tool view of a day's OIR schedule. You can move meetings in the grid to different times and dates, and you can add meetings in a space to change their location or to move them while you move other meetings around the grid.

If the rescheduling, modification parameter is active, and you are rescheduling a date not at hand, the **Find Meeting** button appears in the top manual search meeting.

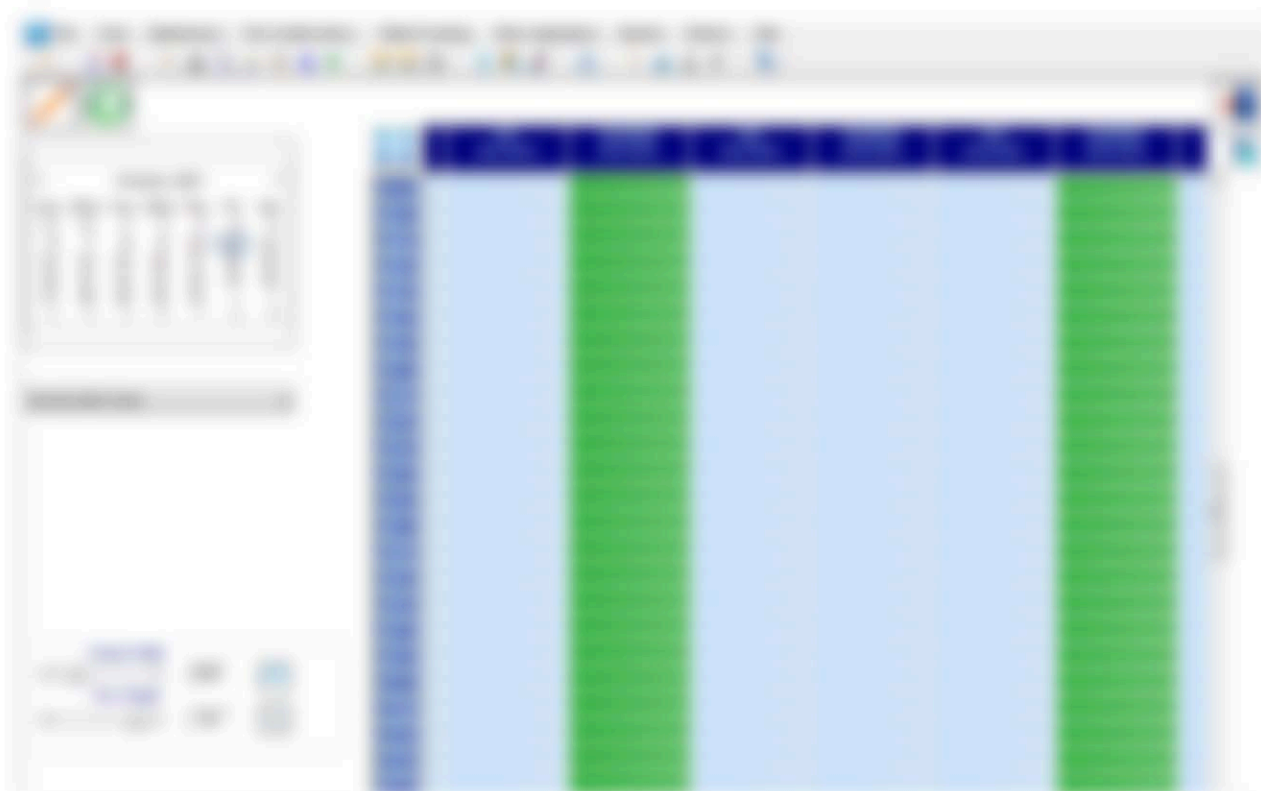
Find Meeting: When you use the Reschedule a Day feature, you can move the other users are moved up or down the day in a multi-tenant site. The effect can be applied to meetings after that user can be by all applications setting of the application parameter settings, conflict, and so on.

Reschedule a Day

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



The Meeting tool showing the OIR schedule for the specified day appears.



The Booking Manager feature in the system works the same way as an other booking grid. See [Booking Manager: Features at a Glance](#) (p. 25).

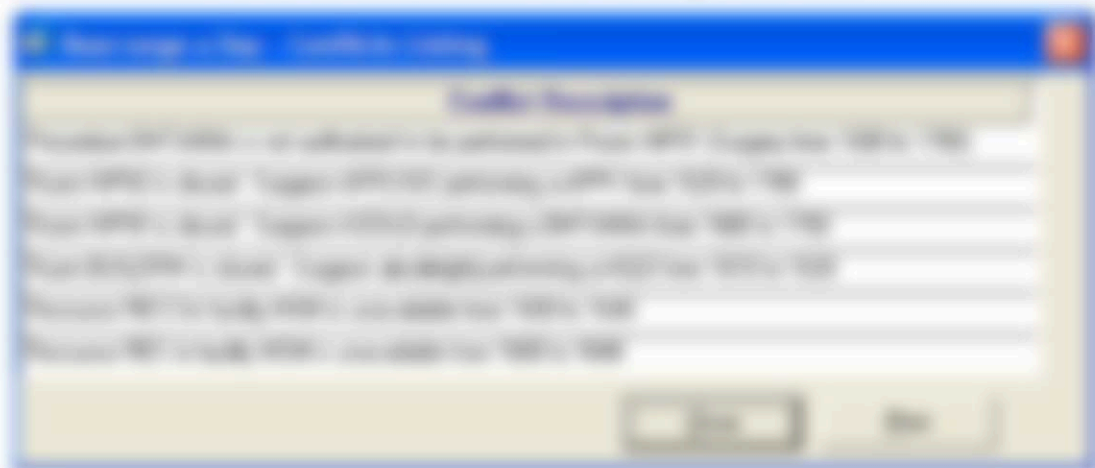
- a. Right-click on an entry in the Booking Grid that you want to move. **Move** will appear. The right-click menu appears. This menu has all the commands you need to manage a booking in the system.
- b. Select the menu items you need to accomplish your goals. The commands available vary depending on 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 **Booked/Conflict Check** to check conflicts for only the bookings that have been moved.
 - Select **Conflict Check All** to check scheduling conflicts for all bookings for the day. Conflicts are reported in order for the following:
 1. Bookings that have been moved.
 2. Bookings that have not been moved.
- d. Click the **OK** button to create conflict checking. See [Conflict Checking in the Booking Page](#) (p. 26) for more information about reports when conflicts are found.



Managing Bookings and Booking Tools

Managing a Day

Bookings shows all events at all the days bookings for a certain day. You can also create additional one-on-one events or otherwise manage bookings through this screen.



See the [Office Manager Configuration Guide: Preferences/Customizing Bookings](#).

View a Single Booking

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

Note: If a **Drag** or the **Booking** is not in the **Drag** window in the **Preferences** Office rule set in **Security Manager**, a message dialog indicating that window is not found and the booking cannot be moved up.

View Several Bookings

1. Place the cursor on the date, right-click and select **View Several Bookings** from the right-click menu.
2. Enter the time range of the bookings you want to view. The upper end of the booking is the time the procedure is scheduled from 1:00:00 AM and you enter 1:00 as the end time. The other booking is shown.
3. Enter the name to which you are moving the booking.
4. Select a Method.

Managing Bookings and Booking Tools

Reservations only

- **End of Last Booking:** Shows bookings in the last immediately after the end of the last booking in the week.
- **First Booking:** Shows bookings in the first booking in the week, and includes the current booking item.
- **Next Booking:** Includes all the bookings in the last week.

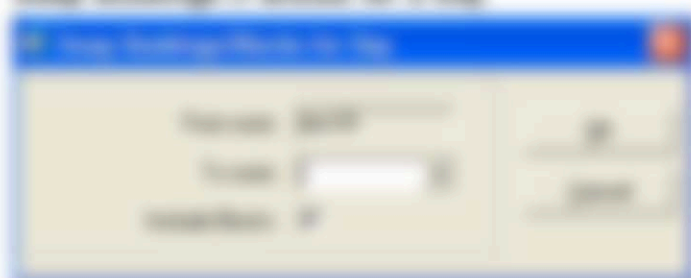
3. Click OK.

Note: If a trigger or any of the selected bookings is set to show this screen in the Pharmacy Office with set in Security Manager, a message dialog indicating that screen is restricted and the bookings cannot be viewed.

Swap Bookings or Blocks for a Day

You can use this screen only to exchange a week's bookings within that week with those of another week.

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



2. In the week select the week you want to exchange immediately with.
3. To include block time in the swap, select **Include Blocks** otherwise, clear this box.
4. Click **OK**.

The schedule are swapped according to your instructions.

Note: If a trigger or any of the selected bookings is set to show this screen in the Pharmacy Office with set in Security Manager, a message dialog indicating that screen is restricted and the bookings cannot be viewed.

Surgeon Filtering for Reschedule a Day

When a booking is created in a multiple facility environment and the system surgeon module is facility application appropriate is enabled, selection of the surgeons with appropriate facility access will occur in Reschedule a Day when the following conditions occur:

- **Swap Booking**

Managing Bookings and Booking Queue

Queueing a Day: The Booking Queue

- [Drop Specific General Booking](#)
- [Drop All General Bookings](#)
- [View General Bookings](#)
- [Drop Bookings/Queue for Day](#)

The system will first verify that all requests and amendments to the booking have arrived in the queue associated with the day. Next, if any of the requests or amendments that are assigned to the booking are not authorized for the day, then that a message is displayed showing which is not authorized and the move process is aborted.

Queueing a Day: The Booking Queue

The Booking Queue is a temporary storage place for bookings. You create the queue by moving bookings into it and it is used to log moving all the bookings to and in each month slot in. The app moves bookings from the Booking Queue to the Booking Slot in complete sync with the bookings. You can use the queue to move bookings while you manage other bookings in the app.

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:

- [View Bookings in the Queue Queue](#)
- [Drop or Add the Booking Queue in the Booking app](#)
- [Change the length of a General Booking in the Booking app](#)
- [Change Booking Effects and Transition Times in a General Booking in app 10](#)
- [Drop a Booking from Queue in app in app 10](#)
- [Drop All Bookings from Queue in app in app 10](#)

Drop Bookings in the Queue

- Right-click on the booking and select either of the following:
 - [Drop Booking to Queue](#): Moves a single booking into the queue.
 - [Drop Bookings to Queue](#): Moves all the system bookings for that day into the queue.

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

Managing Bookings and Booking Tools

Managing > My > The Booking Room

Note: If a booking in the Bookings is set to **Open**, this appears in the **Openings** Office tool and the Security Manager is message displays indicating that a booking is confirmed and the bookings appear as **closed**.

How to Book the Booking Room

1. Select **Book/Phone** from the right-hand menu in the **General Bookings** section.
The General Bookings display opens.
2. Depending on the setting for the parameter **Display phone booking**, you can either the **Book** **Book** or select on the left side of the window or up and down arrows.
3. If you select a column heading to sort the list by that column, then it appears to expand the cell size.

Note: Only the highlighted word up or down indicates that an up or down arrow is the column.

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 **Drop All General Bookings** option in the right-hand menu to drop the bookings into a table.

4. If you select the **Book** **Book** or select on the up and down arrows you can add another way to manage the booking order:
 - If you use the **Book** **Book** or select you can change the order by changing the number assigned to the booking.
 - 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 User Guide.

Change the Length of a Single Booking

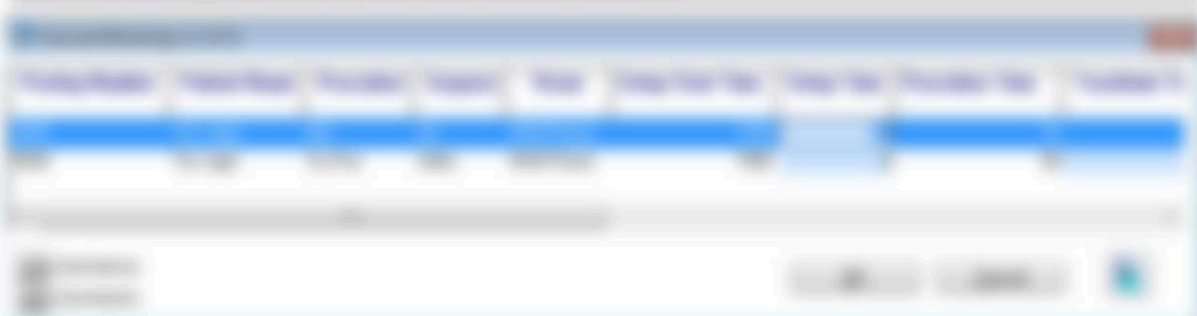
Note: These instructions are for single bookings. There will only one request and only one provider.

1. After viewing the bookings you want to change in the system, click **General Bookings** in the **Bookings** General Bookings display.
2. Highlight the booking you want to change. See **Change Booking Office and Provider**. There is a message displayed in the left pane if a message appears indicating that your selection is a complete booking.
3. Click in the row column **Display Time**, **Provider Time**, **Duration Time** that you want to change the booking.
The row selected has icons to allow to indicate that you can edit the selected row.
4. Change the time in the number of minutes you want.

Managing Bookings and Booking Tools

Managing with the Booking Center

Note: The number of bookings in the Total Bookings column automatically change to reflect your edit as soon as you make the correct use of the column.



- Repeat steps 1 and 2 to change other times.
- Click **OK** to save your changes.

Change Booking Status and Provision Time to a Complete Booking

Note: The edit can then step to change booking status times and provision bookings only. To make other changes to bookings, you must use the **OK Booking** screen.

- After viewing the bookings you want to change in the screen, click **Search Bookings** under the **Search Bookings** tab.
- Highlight the booking you want to change. If a message indicating that your selection is a complete booking, click **OK** to proceed along with the **Full Complete Booking** action. go to **Change the length of a Complete Booking in the provision step**.
You can now change the length of the booking time in the **Search Bookings** screen.
- To change booking status in the length of provision, click **Full Complete Booking**.
The **Full Time Complete Booking** screen opens.
- If necessary, click the up or down arrows to display the length of provision that you want to change.
- Click an **Effect** or **Time** arrow to select and enter your change.
- Click **OK**.

Move a Booking from Status to OK

- Highlight up the next step the time in which you want to place the **Search Booking**. Then select **Drop Specific Search Booking**.
The **Search Bookings** screen opens.
- Highlight the booking you want to move, and click **OK**.
The booking moves from the **Booking Center** to the **Booking OK**.

Managing Bookings and Booking Tools

Reorganize a Day: Fine Tuning Your OIR Schedule

View All Bookings from Dates to Date

1. Right-click on the date and the time in which you want the list of the current bookings to start and select **Drop All Current Bookings**.
2. All the bookings in the system move to the Booking List in the table in which they are listed in the system.

Reorganize a Day: Fine Tuning Your OIR Schedule

After using OIR Manager's Reorganize a Day screen to arrange your OIR schedule for the day, you may have some free-running in the PM. Perhaps you want to insert a 15-minute gap in the schedule, or you may want to eliminate free-running in a room by putting bookings together.

The following sections explain important rules for reorganizing a day:

- Insert steps in the PM page
- Insert a gap in page 10
- Remove current time in page 10
- Insert a Booking in page 10
- Cancel a Booking in page 10
- Edit a Booking in page 10
- Remove current and future for a Booking in page 10

Rules for Inserting Gaps

Remember the following rules when inserting gaps:

- Inserted gaps begin at the point you click on the gap. If you insert a 30-minute gap at 10:00, the gap is from 10:00-10:30.
- If there is already a gap in the Booking List, the inserted gap begins at the point you click on the gap. So if there is already a 30-minute gap between 10:00-10:30, and you try to insert a 30-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 45 minutes.
- You can not insert a booking in a gap. If you try to insert a gap in the middle of a booking, the bookings move down, 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 10:00-11:00.

Insert Step

Note: Use the **Insert** button to insert a new step in the calendar view.

1. Right-click where you want the gap to start and select **Insert Step**.
The insert window dialog appears.
2. Enter the duration of the gap in minutes (maximum is 60) and click **OK**.
The gap appears in the Booking tool.

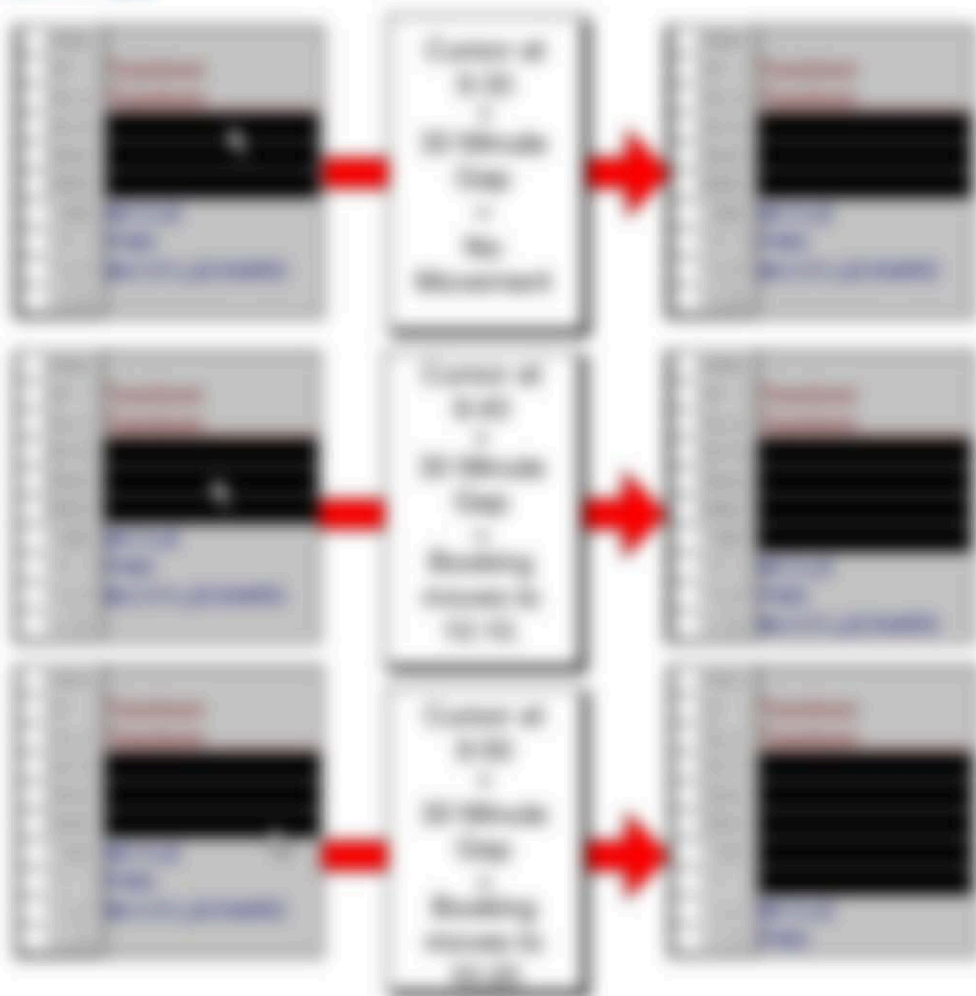
Gap Diagrams

The following examples illustrate the rules for inserting gaps.

Insert a 100 gap



Repeat gaps



Bookings gaps

- Right-click in a gap where you want to add a booking and select **Bookings gaps**.
The gap then where you clicked will be the start booking is defined.



Rearrange a Day: More Booking Options

- Right-click on a room and select **Rearrange a Day: More Booking Options**

All bookings in that room are moved up, consolidating all the bookings and removing all blank slots.

Rearrange a Day: More Booking Options

All Managers' **Rearrange a Day** script allows you to perform some basic booking management commands that include the following:

- View booking
- Cancel booking
- Edit booking
- Add rooms to display
- Select display fields

Managing Bookings and Booking Tools

Managing > My > My Booking Options

New Booking

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

See [New Booking Tools](#) on page 23.

Cancel Booking

1. Right-click on the booking and select **Cancel Booking**.
A confirmation window opens.
2. Click **Yes**.
The **Cancellation Reason** window opens.
3. Select a **Cancellation Reason** and click **OK**.
The booking is cancelled.

Note: Placing the system into a the state of **Booking OK - Cancel**.

Note: If a trigger on the booking is set to **Yes**, this appears on the **Physical Office** tab of the **Security Manager** - a message window indicating that security is activated and the bookings cannot be cancelled.

Mark up Booking

1. Right-click on the booking and select **Marked Booking**. A confirmation dialog appears.
2. Click **Yes**. A dialog appears asking you to assign a priority.
3. Assign a **Priority** and click **OK**. Booking is now marked.

Note: If a trigger on the booking is set to **Yes**, this appears on the **Physical Office** tab of the **Security Manager** - a message window indicating that security is activated and the booking cannot be modified.

Change Rooms and Tools for Display

1. Right-click on the job, then select **Map Rooms for Display** or **Select Display Fields**.
The **Room Rooms/Fields for Display** window opens.
2. Move the room/fields that you want to the **Available** and **Display** columns as desired.

See [Room Rooms for Display](#) on page 23.

See [Select Display Fields](#) on page 23.

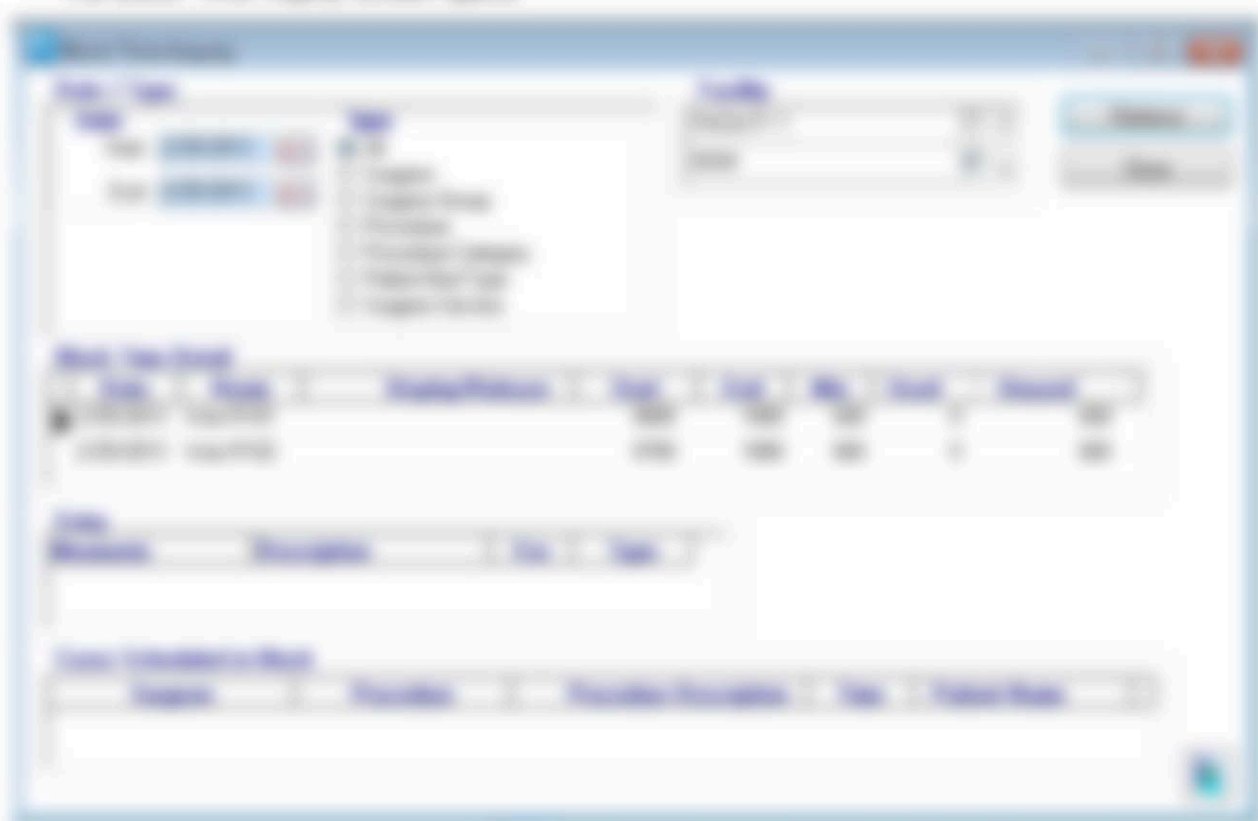
Block Time Inquiry

Block Tools > Block Time Inquiry

The old Manager Block Time Inquiry feature allows you to view scheduled block times for a specified date range. The old view shows scheduled block times, or you can view just block times in specific states or block time sets.

New Scheduled Block Times

1. **Block Tools > Block Time Inquiry.** The Block Time Inquiry window appears.
2. **Block > Block sets and Block sets.**
3. **Block > Type.** The block set shows many changes as you change the Type. You can view more than one entry, but they must be of the same Type.
4. **View Buttons.**
The Block Time Inquiry window appears.



Request Index

What Tools in Request Index

Request Index helps 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 [Booking Tools in chapter 10](#).

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



You can then click the icon in either **Tools in Request Index** or **Tools in the Storage Booking** window showing into the booking requests within specified time period.

Status Columns

The following Request Index columns may appear:

- **R** Request
- **R** Reservation

See the iM Manager Configuration Guide: [User Booking Parameters](#).

Case Records

Overview

Menu/Pop - Open/Edit Case Records

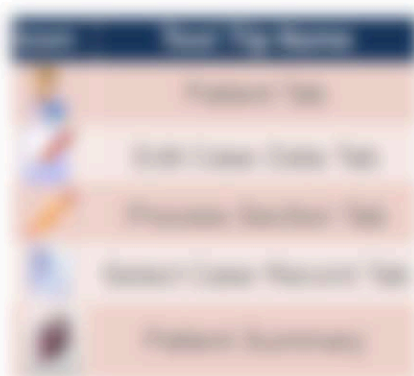
Case records are used to facilitate case documentation. Case documentation may be performed case specifically by remote users in the operating room, and specifically by MR technologists in the coordination of work. All Manager case records are constructed so you choose the record and the information they contain.

Case records hold all of the documentation related to surgical cases, such as orders and nursing 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 use case records in tracking, resource management (RMS), and billing, so that procedures, materials, and billing data are automatically shared in these areas.

Note: An appendix in the All Manager Configuration Guide provides information about the available software-defined versions of MR codes, including the software that determines the code version of various codes as you work in the Case Record Toolkit feature.

Case Record Toolkit

The codes 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 associated data, such as age, sex, sex assigned at birth, ethnicity, education, insurance, and socioeconomic status.
- **Case Record:** This is made up of several sections, each with a specific purpose in the case record. Sections can be added or removed from the case record as a flexible aspect of the case, such as **Interpretation Page**, **Interpretation Record**, **Notes**, **Case Record**, **Lab Data**, **Record**, etc.
 - **Related Case Record:** This is made up of several sections that are related to the case, such as **Related Case Record**, **Related Case Record**, etc. Related Case Record is made up of all of a patient's case record information and is automatically updated.
 - **Case Record:** Case Record related data, and related data Case Record as the only case record section with sections.
- **Interpretation/Description/History:** When needed, supply and description, such as **Interpretation/Description/History**, and other data for the patient are added. The patient record is added to the case record and is added to the case record and is only changed from the data from the record.
- Other components of case information associated through **Case Record** sections, such as **History**, **History**, and **History**.

Images, Sections, and Procedures in Case Record Forms

Images, sections, and procedures are added to the case record forms and update the history, patient data. The change the patient's data for all history, because this is a part of the patient record. In the case record is added to a history, or case record, data is added. All changes change the history, information, and related history data and related history data is added to the case record.

- Images and sections added to the patient's case record is added.

- If an alias is added from a supplier's internal record it will be shown in red although not with the red warning shown in iB Storage. Other internal aliases are also shown after other aliases.
- Aliases are shown as redacted when they are used to deliver customer-facing content in iB Storage.

Processing of Aliases

Example	Source of Alias	Description of Use/Status
Example	From user	Normal use
Example	From iB Storage record	Red
Example	Not a record alias	Normal use with a red warning These aliases are in the bottom of the list
Example	Not a record in iBIS	Redacted use, regardless of source, includes redaction aliases that are used for customer-facing in iB Storage
Example	From record in iBIS	

Case Record Processing Features

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

- **Link Case Record Defaults** Link defaults from the Case Record default document to the content case data and links to the records. These defaults are unique and document-specific and control content defaults. Case record defaults are especially useful to create cases where documentation has a link.
- **Link to Existing** Link a case record to an existing meeting and add a document case from the meeting. This is used when the original case was not made, or if the original case was incorrectly made.
- **Document Signature** Ability to add a signature responsible for the case is electronically sign off on the case details.
- **Link Case Record** This feature links the case record to a specific document or content document, allowing the user to the first step to case completion, use of iB Storage and ensuring that the case has accurate, secure, and efficient access.

Case Records

Case Records Usage Roadmap

When the record is locked, a user can view and log into the record using the [in the document](#) button on the case documentation. After log in, user details:

Case Record Activities

The workflow feature records the computer work and automatically records when it is able to send case record data. 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 see the Case Record Records, determine in which case changes.

Workflow runs automatically at specific time intervals. The number of minutes between workflow runs is set by the administrator user. An auto case records flow that the default setting in the workflow is set to 15 minutes. The recommended setting is 15 minutes.

See the [Security Manager Guide](#).

See the [Case Management Configuration Guide: Case Record Documents](#).

Case Records Usage Roadmap

The following steps and diagrams show how case records are used after the Case Records and Case Record Fields have been set up.

1. **Logging in to Case** In order to log in to case records, you must first specify a system. The user can use the user in a workflow procedure, or if the procedure is not authorized when you log in, the case record gateway or emergency support, you can enter the login procedure and submit information when you log in to the case record.

See [Case Records: Case](#), the [Workflow](#) or [Case Management](#) section, the [Case Records](#) section, or [Case](#).

2. **Creating Case Record Defaults** The user uses Case Management automatically. If a case record field is missing, it is a set of workflow defaults for a workflow manager combination. If you log in to case records for a workflow by the user, you can have the defaults for the Case Management combination from the case record defaults document, automatically. If a case record field is missing, it is a set of the record's field.

Note: If the Case Records is locked in a workflow, using and workflow rules are automatically updated from logging data.

See [Case Records: Case](#), the [Case Records Defaults](#) or [Case](#).

3. **Logging in to Case** The user the user data into the case record during or after the procedure. If in the page is each record, and then the user when it is complete.

See the Case Records Case History and Records in Case 10.

1. When a Billing Case Record has a Billing Information in the All Images, Records and Case Records, the Records in the Case Record. You can add Billing Information using additional cards using additional supplies such as:

With proper security settings, you can also change the amount charged to each supply and set supply rates in the **Billing Settings** box in the Billing Information table. Access to the corresponding box is defined.

For more information on the preceding topic, see the following chapter in the **Alt Manager Configuration Guide Billing Information**.

2. After the case record is stored in completed status, Alt Manager completes the information and provides it to the information in your Alt Manager Billing and Accounts Receivable and Related Management Functions. In addition, Alt Manager completes reports for supplies, savings, time for printing as well as the standard customer reports. When Time, Images, and Paper Information has completed work.

See the Alt Manager Configuration Guide Transferring Images and Supplies.

Case Record Screen

Chapter Contents

This chapter covers the following:

- Case Record Screen Overview
- Case Records Filtered Tab Overview
- Filtered Tab Search Results
- Filtered Tab Search Case
- Filtered Tab Filtered Case History
- Select Case Record Tab
- Health Record Screen
- Add Case Data Tab
- Add Case Data Tab Buttons
- Add Case Data Tab Filtered Case Buttons
- Add Case Data Tab Description History
- Record as History
- Add Case Data Tab Case Analysis
- Add Case Data Tab Case Summary

Case Record Screen

Accessing Case Records

- **Menu/Pop-Up = Enter/Edit Case Records**
- **Menu/Pop-Up = Enter Multiple Cases**
- **Menu/Pop-Up = Enter Case Record Details**
- **Update Draft/Enter Draft**
- **Search Case Records**
- **Generate Case Record**

Accessing Case Records

You can create new case records using the following methods:

- **Menu/Pop-Up = Enter/Edit Case Records**
- **Menu/Pop-Up = Enter Multiple Cases**

You can also create a new case record from Storage Buckets or from SmartPhone. The **Case Records Screen** has a **Generate Case Record** button on the top right corner of the screen. You can click on this button to generate a new case record. You can also click on the **Generate Case Record** button to generate a new case record.

You can also create a new case record for editing using the following methods:

- **Menu/Pop-Up = Storage Case Records** Storage Case Records enables searching for case records by a wide range and many combinations of criteria.
- **Menu/Pop-Up = Enter/Edit Case Records**
- **Menu/Pop-Up = Record Cases** This selection presents you with a table of up to 10 of your most recently added cases.

You can also select an existing case record for editing from SmartPhone.

See Storage Case Records or Case List for information on how to find and edit case records from the Storage Case Records screen.

Case Record Screen Overview

Menu/Pop-Up = Enter/Edit Case Records

The **Enter/Edit Case Records** screen is the first page of the **Case Records** screen. It is here that you create case records, edit existing case records, and add new cases.

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

Case Record Table



The Case Records screen has the following tabs:

- Table** The Case Record Case Record screen appears in 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 contains two functions:
 - As a patient record is first 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 edit information about the patient into the case record patient data forms after the patient record is found or created.
- Table Case Record** After the **Table** is selected, you use the **Table Case Record** tab to select an existing case record or to create a new one.
- Table Case Record** After a case record is selected or created, you use the **Table Case Record** tab to enter or edit data in the appropriate sections of the case record. In addition to the case record sections, the **Table Case Record** tab contains a number of sections that allow you to enter records for existing, adding, or deleting such things as case contacts, living history, and supplies used in your case record.
- Provide Section** Open the selected section.
- Table Summary** When you click the **Table Summary** button, the **Table Summary** form is opened. This form is a summary of the case record. If a summary form exists for the patient summary, it is available for viewing. Because the patient has not yet been selected in **Table Summary**, in the patient summary has been generated in **Table Summary** in **Table Summary**. When the **Table Summary** is successfully created, data is returned. The **Table** is updated in the Case Record table. The **Table Summary** form is available in the **Table** tab and the **Table** tab. The **Table** is the **Table** Summary is generated by the configuration created using used by the **Table Summary** Summary section. Use the **Table Summary** form to view the **Table** of the **Table Summary** and the **Table** configuration table for configuration details.

The **Table Summary** is available only if a facility code with the following functions available:

- Change the existing patient
- View notes, history and history the notes with text
- View record reports
- Print summary, notes and record reports

Case Records Patient Tab Overview

It is another way to navigate. In case records the Patient tab also has two modes: **Basic Patient Information** and **Notes**.

- **Basic Patient Information** mode is displayed when you click in case records. It provides demographic fields for you to select for a patient in the ICD Manager case record window or add records. You can also use this mode to create a new patient in the ICD Manager case record window. After you select a patient for the case, you can compare with the basic patient information that you can add records in it in a data entry mode.
- **Notes** mode is displayed automatically after selecting the patient for the case. Patient forms are shown on the right and the list of selected and displayed is added. 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 within the Case Records Patient Tab. The interface features a top navigation bar with icons for Case, Patient, and other functions. Below the navigation bar, there are several input fields for patient information, including Name, Address, and Date of Birth. A 'Search' button is visible on the right side of the form.

Form Mode

The screenshot shows a web-based form for entering patient data. At the top, there are tabs for 'New', 'Edit', and 'Print'. Below these are input fields for 'Name', 'Address', and 'Phone'. There are also checkboxes for 'Male', 'Female', and 'Unknown'. A sidebar on the right contains a list of tabs or categories. The form is titled 'Class Record Form Mode'.

Form mode opens automatically after selecting the patient and clicking the form button under the patient record.

Patient data forms are configured by your hospital.

For information on adding and modifying forms for your site, search for "Form Definition Overview" in the All Manager Configuration Guide.

Note: An asterisk (*) at the end of a field indicates that the field is required to be filled in the form. You will enter the field to use the form. Note also that any content outside of the form will not show the associated text, just 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 Tab Overview

	Review the All Manager case record updates.
	Review the CRD.
	Review the case patient address forms with updates.
	Create a new patient in the All Manager case record system.
	Open the patient form.
	Save the currently selected patient to the case record.

Forma Module



	Forma Manager
	Review is a different patient.
	Review the patient is only available while you are working in 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 Case CRD.

Patient Tab: Patient Search Options

Search Options

Get Results: This command tells you search for a patient using different methods in the case management and you get a report.

1. Search the ICD Manager database. Patients in the ICD Manager database have previously had images at our facility.

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

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

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

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

3. The ICD report search option is offered when ICD Manager cannot find a match on the ICD report using the criteria for the ICD report. The ICD report looks for ICD report combinations that may not exactly match what you put in the ICD report but are close.

Example: Having a "last" name being a patient's "first" name, that is, last name.

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

Search Option Notes

- The information you need to get in a patient's patient report is controlled by a setting in Security Manager. Requirements can be one 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 names, ICDs, date of birth, and/or unit ID as well.

Case Record Screen

Patient Tab: Search Details

- You can double the **New Patient** button and pull up an ICD Manager database report and the report form will be completed. The feature helps a user afford to conveniently add multiple patients to the database. Contact the Price Check Center for more information.
See the Security Manager User Guide for more details.
- See **Searching and Querying** chapter, on page 22 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 information provided.

You must enter the complete account number, including state, zip code, etc.

Unit Number searches

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

Patient Name Searches

Search Name **Search by** **Page**

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 assumes the following word order:
Last First Middle Initial

Example:

If you enter the last, first, and middle names the result is automatically displayed as follows:

Last = John

First = Joe

Notes: - All
Fields: - All
 In this example, you would instead need to use a different search code together with a patient ID
 address: 101-101-101-101

More examples:

To Search for this	Enter this
101-101-101-101	101-101-101-101
101-101-101-101	101-101-101-101
101-101-101-101	101-101-101-101
101-101-101-101	101-101-101-101

Recommended Search Methods

Note: If you intend to use record from a building in a system integrated with Healthcare Manager, you select a patient with a different ID# from the building, a message appears. The message requests confirmation of the patient in the location of an address code for the selected patient. Click **OK** on the message to display the most recent patient search results without entering a case record.

Search for a patient

The screenshot shows a search interface with a toolbar at the top containing various icons. Below the toolbar, there are two main sections: 'Search criteria' on the left and 'Search results' on the right. The 'Search criteria' section contains four input fields with labels: 'Search by', 'Search for', 'Search for', and 'Search for'. The 'Search results' section contains a list of results, each with a checkbox and a name. The first result is checked and labeled '101-101-101-101'. The second result is labeled '101-101-101-101'. The third result is labeled '101-101-101-101'. The fourth result is labeled '101-101-101-101'.

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

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

1. Use the method in the Search String box, as required.



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



EM Search button  to search your EM system.

The button at the bottom lists the patients who meet your criteria.

3. Double-click the patient's name to select the patient and view the Patient button .

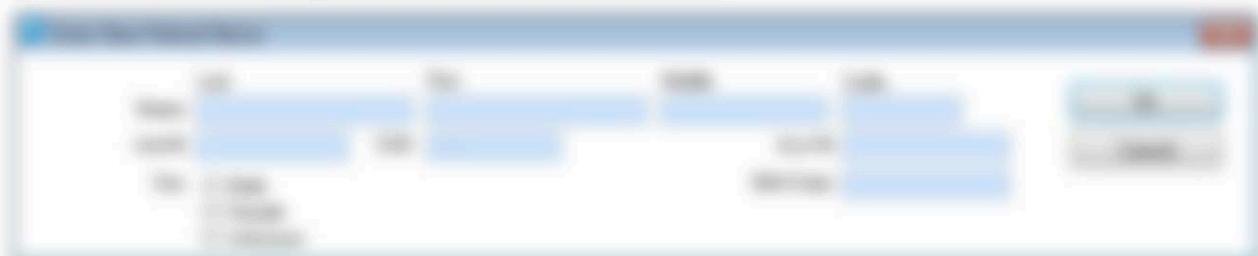
Note: Instead of clicking Patient in the top step, you may want to use the Search Case button, which enables you to select the patient's patient with a limited procedure in order to make creating a case record much faster. See [Case List - Search Case](#) on page 10.

How to add patient to the EM Manager case record system

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



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



Note: The values entered for last ID, EMR, Birth Date, and other fields in this window are copied automatically to the case record patient data. This last number is copied for all patient data for a existing patient with a last number and if no document number exists.

Note: Patients entered as New Patients do not have an Account Number or Unit Number and cannot be linked with any lab specimen through your hospital's administrative system and the case record is entered in the patient. As an alternative, you can assign an account and unit number within iQ Manager by using the Change Patient feature in Manage Case Records. After the case is assigned account and unit numbers, the patient data entered in case records is associated by the information entered into iQ Manager.

Note: There is a **continuous background patient search** to update the New Patient status and also auto-update iQ Manager information, as well. This feature ensures that case record for existing patients reflect entering a new patient in the database.

See the Security Manager User Guide.

See About the Suite on page 15.

Review on Worksheet

When reviewing a case from a heading for a patient that may contain records, the iQ Manager user can also be review an iQF patient. If such is necessary, a Review Patient change appears to edit and merge patient data containing any corresponding evaluation data.

When a patient merge occurs into the current heading, data will be updated. If any other heading exists in the system for the patient the case patient data for that heading will not be updated.

To update the heading, the flag review patient, an administrator must be set in the Application Properties in File, 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 meeting 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 report number in the **Encounter Case Record screen Patient tab** as you would for meeting or adding any case record. See [Screen 10: Encounter at page 10](#).

Note: After meeting is over, in **Encounter** and gathering is over, case, a list of meetings is displayed based on date and patients with a similar name. If the meeting patient and case record patient are different, a warning message is displayed and clicking **OK** shows the list in the list of meetings for resolution.

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

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

Quick Case Screen	Action Screen or Record
no report	It goes through a selection process and creates a new case record with the patient image information already there is. The new case record opens directly in the Encounter Case Record screen .
no report, 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 existing operations where one of the operations is 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 the same way you would do it in a standard Case Record.

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 meetings 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 meetings for operations that are to be performed on a particular patient at the date you specify.
- The system lists a meeting to make that was made already.
- The default **Meeting Date** is the current date unless it is set to another date by a parameter `quick_date_day`. The user controls 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 entire patient. This tab is always available when working with the case record.

Audit Trail

If administrators have set permissions for you, you may use the audit trail immediately in front of the data for a form.



This icon indicates that the field value was changed and saved from that user. The user uses the audit trail icon to use the Field Audit Trail that appears for the form. The Field Audit Trail that appears provides information about changes in the values in the field. For more information about the Field Audit Trail icon, see *User Manual*, Audit Trail, on page 125.

If two users are working with fields in the same form, changes made by one user are not shown by updating 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** moves you to the patient record for a different patient after you have selected this patient.

Case Record Screen

Select Case Record Tab

Note: Using the feature case record brings up case record in a new patient. This might be needed if the wrong patient was chosen for the case. See [Change Patient at page 22](#) to change the patient or to add to the log.

- **Save** saves the changes you made after checking that the medication and recommended tests are complete.
- **Close** exits the screen after nothing else of any interest 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 test data information from a previous case into a new case record.

For example, you could use this feature with your management cases where many of these cases are new similar to each other. You can simply copy the first case to create a new case with much of the patient management information from the first case defaulting into the new case, so that you don't having to duplicate the same information.

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

Begin a New Case Record

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

Click on **Building** screen appears, allowing you to tell the case record is an existing building.

2. Tell the case record is a building, if applicable. If the procedure has been located in **Off-Storage**, the system automatically fills in the header section of the case record for you. To set it up, do the following:
 - Select **Search By** to search by **Name and State or Building ID**.
 - Enter the **State** **State or Building ID** and click **Search**.
 - Select a record from the resulting list to link the building to the case record. Then click **Select**.

The **Download Case Data** tab comes up.

Note: The system will a building is made that can use.

Note: If a building includes some modification data, that data is downloaded to a case record created from the building.

3. If the procedure has not been located in the **Off-Storage** system, click **Cancel**.
The **Download Header Section** screen appears.

See [Download Header Section Screen](#).

Header Section Screen

The **Header Section** screen is used to create records during imports and to add building data into the case.

Use the **Download Header Section** screen to enter or add case-specific information, such as procedures, requests, equipment, and data that appear in the headings of the screens for case.

Case Record Screen

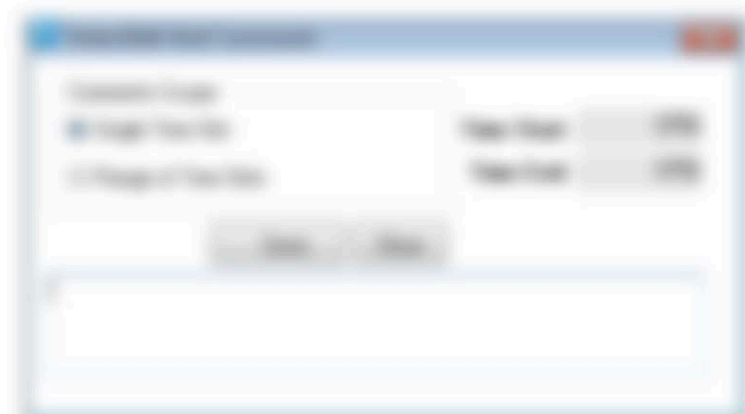
Header Section Screen

NOTE: If a case is taken from a meeting, much of the data in this screen is automatically pulled in from the meeting. If the actual case data is different from the meeting data that is pulled in, you need to update the appropriate fields as necessary.

If you try to update the **Process Header** when another user has a session of the same case open, a message appears as notification that a session user and duration of the current session is in use. The message allows you to click **OK** or **Cancel**. Clicking **OK** opens the **Process Header** in read-only, and **Cancel** returns you to the previous screen.

The current duration information is also shown. **Process Header** and another session is open regardless of the user is notification indicating the same user from the same session is in different notification appears when a user would need to select either the session is already opened for this session, you to click **OK** or **Cancel**.

2. **DESCRIPTION:** The **Writing History** section enables another user accessing the **Process Header** to view this mode. The **Flagging**, **Case Manager**, **Plan**, and **File** buttons are always disabled. **History** is added to the header screen with accounts case data results is represented in most number of change individual agents and intelligence. This is represented as all of change case agents and intelligence, and header data in the respective calculations. For example, the **Plan** data calculation agent and change calculation agent use the header **Plan**, **Flagging** and **File** screen in the completed case screen for calculation. **History** of header data data is added upon completion of the case screen.



NOTE: The **Flagging**, **Process Manager**, **Flagging**, **Plan**, **File**, and **File** are in the same way as they are in the **UI** Meeting screen.

The buttons in the lower right of the screen are duplicates of some of the buttons in the **Case Data** screen. However, the **Flagging** Meeting screen duplicate to the **Flagging** Meeting button is slightly different from the screen shown through the **Case Data** screen. It does not show the **Flagging**.

See Edit Case Data Tab, Bottom of the Edit page

Important Notes

- The report captures case data and notes all automatic changes to the system because the standard statistical reports are data from the system only.
- Since the header information contains the billing codes and patient numbers, you should always check the system for accuracy when you create a case record.
- You should include the system for accuracy before completing a case.
- On the report, you can suggest, generate, etc., case data elsewhere, it should not be case-defined system, because it will result in inaccurate statistical report values.
- You might choose to add a case to case-defined system, assuming the user is update the header if a change occurs.
- If you add a case record that uses unaffiliated equipment, you can remove the unaffiliated equipment and add affiliated equipment, but it is not possible to add unaffiliated equipment. The case record is then over with the unaffiliated equipment.

Edit Case Data Tab

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

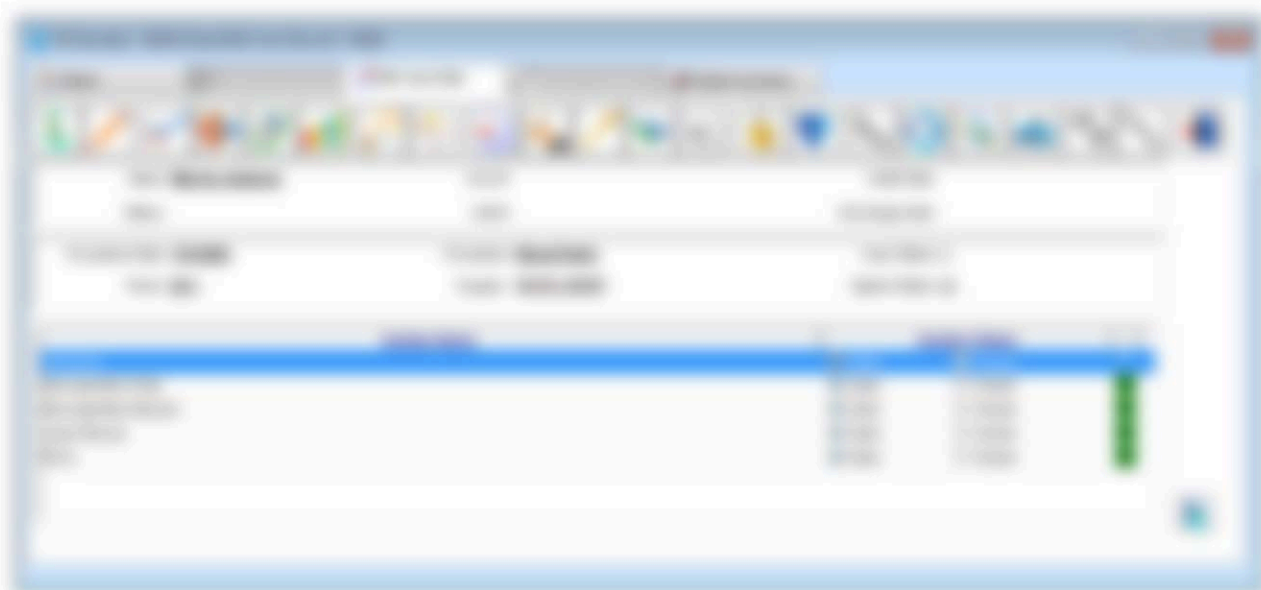
Edit Case Data Tab Example

The example below illustrates what you can enter you first open the **Edit Case Data** tab. Because sections are system-defined, the number of sections as well as the names of the sections you can use are different from above.

- The information at the top of the tab is from the header information you entered in the header section when it was added to form the headings below.
 - Case Notes** tells you if the case is complete (C) or incomplete (I).
 - Report Notes** tells you whether all cases involved in recording the case have report of (R) or no report of (N) or that section is null.

Case Record Screen

Edit Case Data Tab: Buttons



- The bar in the lower left side displays the sections of the case, as well as the status of each section. The **Buttons Status** section tells you whether the section is open or closed. This stage gets started after completing it. It also tells you whether you have the security needed to edit the section.
 - Open:** You can edit the section.
 - Locked:** You can view, but not edit, the section.
 - Not:** 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 case analysis data. These buttons are described in the following topics.

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 content such as filing history and Case Analytics. Button availability is based on individual user access.

Add Case Record Data Icons

Icon	Function
	Previous Record
	Previous Record
	Previous History
	Home
	History History
	Case History
	View Log
	Print Log
	Add Case Record (Default)
	Signature Required
	Get Signature/Printing
	Change Case Status
	Add Case Record
	Print Case Data Top
	Print Case History
	Print Case Log
	Help/About/Instructions

Buttons Table

This table gives a short description of each button and, if necessary, points you to more information about the function the button serves. It also provides the default key combination which allows you to access the screen from your keyboard.

Article	Description
Use Signposting	Wings up the case Signposting screen where the user can select a category in the case record and whether records are signed off or in progress mode. (see the case in pending signature.)
Using Case Notes	Changes the case notes from Complete to in Progress and vice versa. Cases that are signed off in Complete notes for adding in the additional and additional information to be completed.
Use Case Records	Links the case record with another case sign in. Using this action has the following effects: - Creates the Storage Settings screen where you enter selection options. - Creates the Storage Settings Options screen which displays selected results. - Creates the Storage Case Records - Selection screen where you enter selection options. - Creates the Storage Case Records screen which displays selected results. - Creates the Selection screen. - Creates Training screen. If other records are open, a message reports them and prevents saving.
Find Case Study Test	Link changes to data held in the case record. Also available from the Storage Case Records Records screen. See Case Record Study Test on page 120 for complete information on using the case test screen. You can also display individual test result notes from within case records using Case Records on the test. See Case Study Test on page 120.

Section	Description
Provide New Supplies or Provide New Supplies	This section suggests entering the following: Provide New Supplies or Provide New Supplies. To enter when case data has been changed from a complete to incomplete. Provide New Supplies suggests new supplies changes are to be submitted as current case information. That is, new supplies changes made after completing the case could be included in the case information. Provide New Supplies suggests that no new supplies are to be submitted as a result of completing a case. The default can be either to provide or to leave new supplies. Depending on setting for provide is submit, incomplete. The case information in the preceding table, see the Security Manager Case Table.
File Worksheet	When used to change information data from a completed location.
Case	Change the Case Record screen.
Case ID	Change all the sections of the Case Record that the user has the appropriate access to do so. This section is inactive when all the sections are checked, or if the user is restricted from viewing the sections that may contain data.

Edit Case Data Tab: Filling Out Sections

There are two ways to fill out case data records:

- Independently** - Enter in the system in the operating room.
 If you have a PC in the operating room with OR Manager installed, you can fill out the case records while the procedure is being done.
- Post Operatively** - Following the operation.
 If you do not have a PC with OR Manager in the operating room, you must keep 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 log controls which sections and pages appear for particular facilities and procedures are based on user-defined criteria.

See the OR Manager Configuration Guide user defined screens.

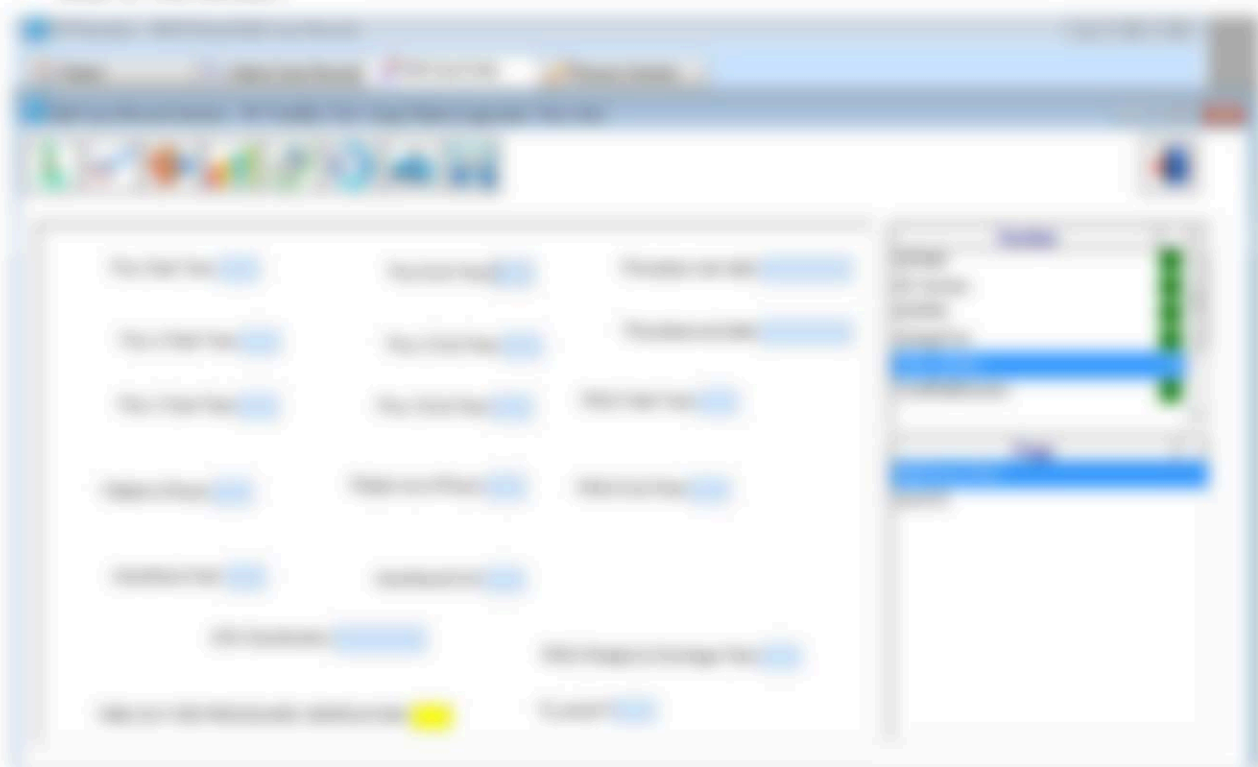
Case Record Screen

With Case Study Tab: History for Section

With Case Record Section

1. Double-click on the **Section** you want to edit. The section will be double-clicked upon the **Open/Close** side buttons, or highlight the Section and click **Provide Section**.

The **Full Case Record Section** window opens with the first page of the selected section on the left side of the screen.



2. Click on **Page** in the **Page** window to select the page of the section to edit.
The page you highlighted appears on the left side of the screen.
3. Click on **Section** in the **Section** window to select another section of the case 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 data or select any of the data input options within.

Note: Fields with an orange background are mandatory. Those with yellow backgrounds are recommended.

5. Click any of the buttons in the lower right to save, undo or with other case-related data without having to return to the first screen of the **Full Case Record** set.

Note: If you have entered data in a section, and then decide that you want to add it to another table, you select **Alt** and then select the tab.

Automatic Log Out and Logging In After Exit

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

After the system closes in the message window, a log in window opens.

If the current user needs skills to view record or user record update 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 data and close all messages. Click **Cancel** to retain the first user's data and display the login window to the second user.

See **Database Fields** on page 25.

See **Add Case Data Tab: Adding New Records** on page 25.

Buttons

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

Button	Description
Print Case	Prints the user record in Database Report , Case Record Update Report , Standard Case Record Print Format , or Custom Case Record Print Format . If you select Print in the Print or Print list, the window will display an Options dialog box.
Find	Brings up a search reference window to use the suggested and personalized for the user.
New	Adds the user to the system.
Get Windows	Shows users in change windows data from a personalized location. The windowing menu displays Windows to open a personalized and presents a warning message if changed.
Refresh	Refreshes the database listing window with only supplier information listing window. You need to open and close the supplier window listing Refresh . See Add Case Data Tab: Adding New Records on page 25.

Using Word Processing Fields

Word processing (WP) fields in case records have some unique features. If exception noting is not enabled, you will have all the Word Processing in all Microsoft Word. If you are using the Word Processing, in addition to entering the text into, you can use the Microsoft Word notes to insert pictures and the documents. The Comment text notes is not available in Microsoft Word.

Case record WP documents can be set up to use different templates to be associated with specific body images or categories. If selected, the document is associated with the selected template. If selected, you can use the Microsoft Word notes that are document if you have a specific template set to use in your document or change the body images with the comment text already associated with it.

Note: Microsoft Word notes need to be enabled in order to insert pictures and messages when opening these fields.

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

Field Audit Trails

An audit trail is available in any case-defined field in a case record by using [Field Audit](#) on the field. It is located in a field in a column on the Field Audit table. The audit trail is as follows:

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

Edit Case Data Tab: Exception Noting

The Exception Noting window displays the terms, quantities, and images from the definitions, units, and the Billing Codes associated with the case. The case details terms and quantities in either three columns, and listing the images.

The following sections discuss important exception noting notes:

- [Words in this column: term on page 10](#)
- [Unit in this column: term on page 10](#)
- [Words in this column: term on page 10](#)
- [Words in this column: term on page 10](#)
- [Unit in this column: term on page 10](#)
- [Words in this column: term on page 10](#)
- [Words in this column: term on page 10](#)

Case Record Screen

See Case Data for Description History

- **Supplies a Definition** (see page 10)
- **Provides Existing** (see page 10)
- **Description History and History** (see page 10)
- **Description History List** (see page 10)

The **Case Description History** describes the action by users of accessing the screen to add additional supplies or make other to supply quantities and to supply change change address history code.

Information derived from the description history screen displays the following:

- **Supply Change** (see page 10) in the history screen.
- **Supply Code** as received within 10 days for case and address.
- **Supply Code** to support additional working within 10 days.

Users to perform the description history screen results in information in all the above. It is therefore important that users are provided to understand the current description history is performed accurately. This includes a comprehensive review to add the description history screen. See **Case Description History** (see page 10) for a description of the screen to add description history to working.

The description history screen may be performed by two methods:

- **Enter the operating mode during the operation history.**
- **Enter the operating mode following the operation history.**

See **Case Description History** (see page 10) for a description of the advantages and disadvantages of each method.

Note: Changes made to Description History are recorded changes that are used only in the current case. Working screen in the Description History screen does not change items, prices, and quantities in History Screen or Definition code.

The user enters the Description History screen in one of three ways:

- **Click **SupplyHistory**** in the Case Record screen. This allows you to do Description History for supply items. The following steps show the screen to Case Record, which shows, updates, items to be automatically described in the case record by entering the case code in the case screen.

Case Record Screen

Get Case Data for Diagnostic Testing

- Case Record** is a case record screen. This screen allows you to create, update, delete, and view case records. This is the recommended method for creating and updating case records. It allows you to create new and edit existing case records and their associated data.



- The off storage configuration does include a method for writing across the entire array of

you to use Exception Handling within that you made in exception testing case that the user effective use. Use the documentation in that guide for the Exception Handling.

Two Methods for Exception Testing

The exception testing process can be performed by two methods:

- Before the operating system during initialization testing
- Inside the operating system following initialization testing

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

Exception Testing Done in the Operating Room

The exception testing process is performed in the IRT Manager application on the personal computer in the operating room by the circulator as either initialization testing is being done. The circulator must therefore be responsible for the following:

- Building all supplies and quantities of supplies used
- Correctly identifying in the system any additional supplies used
- Identify any additional supplies in paper used that are not in the system (e.g., implants)
- Identifying which supply items in the IRT Manager system that should not be changed in the system (e.g., supply information)

Further information after the case is still responsible for the following:

- Building the supplies used
- Building changes for change which supplies

Advantages

- Some time is saved process. The circulator performs initial testing as well as the exception testing, usually saving time needed in the process as the exception testing does not need to be performed outside the room.
- Full quantities. Supply quantities are easy to add in the system.
- Finding additional supplies. The user needs to locate and find supplies in the database, providing the user knows the supply information.

Disadvantages

This commitment is process. Although the system makes it easy to perform exception testing, it will show the user additional time to perform the action. It is especially difficult to perform exception testing in some cases (BMP, etc., tubes, other procedures).

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

Case Record Review

With Case Study 10: Exception Billing

- **Difficult to audit.** The case study on IIF Storage will not determine if exception billing was approved but it is difficult to establish whether it was done properly. It is difficult to establish and audit the details of a contract over the following day. If the case is not audited immediately following the case it is likely that errors in potentially approving invoices cannot be corrected.

Exception Billing in IIF Storage does not include the Operating Room, following the case

The exception billing process is done in paper usually in the IIF Storage conference room and authorized by the provider as either retrospective charging or being done. The third case authorized an approved in a paper document to the exception billing process. The actual exception billing process in the IIF Storage system is done by another individual outside the operating room, usually in part of the central code building process.

The provider is responsible for the following:

- Building all supplies and quantities of supplies used
- Correctly identifying in paper additional supplies used
- Identify any additional supplies used in paper (e.g., implants)
- Identifying which supply items that should not be charged to the patient (e.g., consumables)

Another individual after the case is not responsible for the following:

- Building the supplies used
- Building supply quantities and entering additional supplies used
- Building charges for charge outside supplies

Advantages

- **Time commitment.** Supplies used can be indicated quickly in paper. Transactions can focus on patient care in short cases after their performing either exception billing.
- **Building.** The paper may need to be exception into the supplies can be quickly audited and patterns can be established to determine overcharging in the process or potential errors in what supplies were indicated as used.
- **The exception billing can be done while performing standard case data audit.** The exception billing, auditing, and billing charges (charge outside consumables items) can all be performed in a billing activity.

Drawbacks

- **Time to exception code.** It takes a few additional hours (average 100 hours a day) to perform exception billing outside of the operating room. However, this can be offset up the the standard day to day billing process to maintain the additional time investment.

Recommendation

You should first consider the advantages of performing the exception billing process in IIF Storage (IIF Storage) the case by a dedicated individual. When IIF Storage does not fit up the scale of

Case Record Review

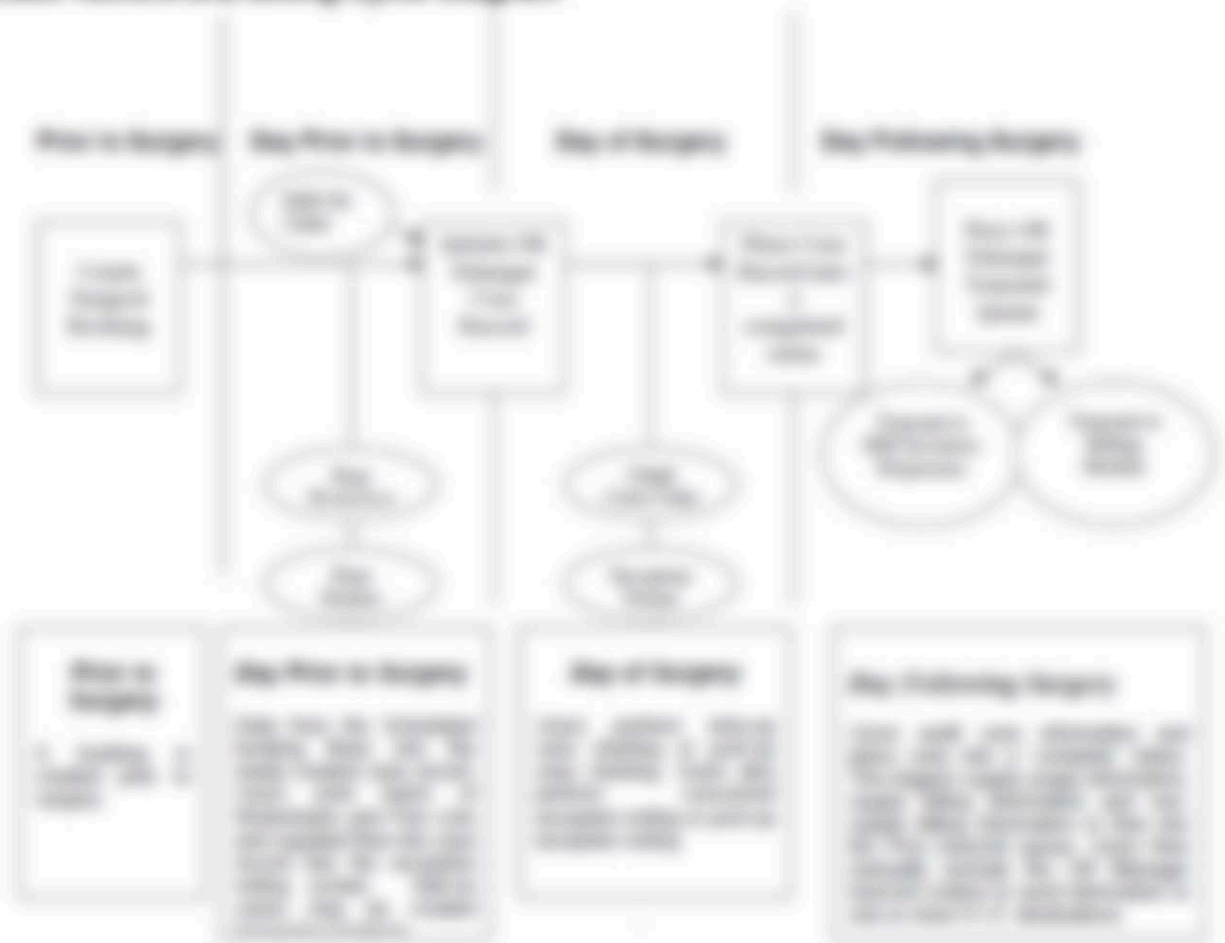
Case Description: The Exception Policy

exception policy, case building and getting change without change in the action, the definition and goal, and the case record in the Manager and the case following the request approach to perform all the above actions. All other of the implementation of performance with the first approach. If you choose to perform exception policy in the spending action another case needs to build record and other changes for change without record.

The question scenario is implementing exception policy action in the spending case in the first record to perform the action. Before having documentation required, it is possible to define how this is documentation of the request approach that they currently do. Additionally, when exception policy required, all case time is to be dedicated to the action process. Before considering when exception policy action the spending record, the case rule that is enough time is available perform other mapping. If other mapping that is a challenge that it is more than that, an immediate exception policy process will occur.

If it is determined that the time constraints in the spending case would be excessive and you wish to perform the exception policy in the spending record, other rule are not just the other comprehensive building procedure is ensure that the exception policy process is being performed accurately.

Case Record and Billing Cycle Diagram



Exception History Screen Type

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

- Click the Case Record button for information on displaying the Case Record.
Displaying the Case Record is controlled by the parameter **Display Case in Exception History** for the Billing Cycle screen type.
- Depending on administrative settings, records may not display in the Case Record as follows: the record is a single bill, it is not a bill, it is scheduled to change individual data, or it is not in a bill.
- TopPriority records displayed with the parameter **Top** in the Exception History screen are added to the list TopPriority screen screen. Manage exceptions screen from screen of history list.

supply is represented by under-supply, supply is associated with facility, supply with exception is associated with assigned facility, and representation is associated with assigned facility.

Note: The screen will be unavailable if represented in the last. The Facility Data screen is the screen for adding data to data in exception.

- In Exception History, a Facility Data screen is shown against with either of the two indicated screen names. The screen data can be entered by double-clicking it.
 - On** for all as data in data in the Facility Data screen.
 - Off** for all as data in data in the Facility Data screen. The user will be asked about by double-clicking it, but the adding data will change the data about that is represented in adding.
- The supplies are added in the following order when the Facility Data screen is not up:
 - one time (there is only one) when user defined data about work.
 - facility.
 - data.
- In addition to the view of the Exception History screen shown in the screen graph, two other views are available through selection in the **Window** menu:
 - Supply View Data Window:** The screen shows data supply between other screen pages on screen. Data about this, adding history, Performance Data, Data History, Data Log.
 - Facility View Data Window:** The screen shows data for supply between other screen pages on screen.
- In the **Facility View** **Menu** **Facility Data** **Exception** and **Facility Data** screen, you can identify the screen data in which data about work are available.
- You can drag the boundaries of the screen history with **Facility** with the left mouse button to make changes in which data that are added when you select the screen. A right click in the screen history with **Facility** shows the **Facility Data** screen after the data the screen is the default width.

Duplicate Data in Exception History

Exception History screens concerning duplicate data depend on the setting of the parameter **Duplicate Supply Group**. If the parameter has the value **0** and **Off** Storage screens a duplicate data. The data is added to all an existing data.

The user of the screen chooses the user when the parameter **Duplicate Supply Group** has the value **1** and **Off** Storage screens multiple duplicate data, and Storage is added using the duplicate data. Duplicate supplies are also identified.

The screen shows the modification of the data. The value of a new duplicate data, is depending on if the screen. The screen prompts for the addition of a duplicate data with the following message:

Are You Ready to Add?

Case Record Screen

See Case Data Tab: Description History

Tap to Add Duplicate Item

Tap to create Related Duplicate Item

Clicking **ADD** displays the Description screen with information to assist you in adding the duplicate item.

Clicking **REL** displays the existing supplies list with the highlighted entry selected.

Clicking **Related** is the case of a duplicate triggered by Case Data with the focus item as the first entry in the Description History window. Clicking **Related** is the case of a duplicate triggered by a related entry using the focus as the first entry in the Description Supply window as shown in the table below.

A message appears in a special case in which adding or editing supplies would result in a duplicate entry that matches an existing entry in all of these three forms:

- Inventory
- Stock Number
- Case Data

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

- **Yes** You can continue adding the item as usual.
- **No** Alerts the Case Data change and updates the value in the original entry.

An item can be entered with a different case data, and it will be item already exists in the case with a different case data. An entered item as considered a duplicate and adding a new entry is required.

The display of duplicate items in Description History shows **Inventory**, **Stock Number**, and **Description**. This shows the item if you have an identical supplies on either other form because the display includes **Inventory**, which is designed to distinguish between them because they are added under the same Inventory and Stock Number.

Case Data Concepts

Clicking **Update Case Data** shows inventory items to be automatically documented in the case based on existing the list value in the last screenshot. The data from the case specifies a specific entry value is displayed in the screenshot in all in the case after an item that is in the case or it has been that is not in the case.

Case Data is also available from the Case Record Inventory window, and it functions differently in both windows except that in the Case Record Inventory window, it updates only is required. The contents of the Description History window work, and shown through adding DescriptionHistory as a case, and the other shown through adding DescriptionHistory as a related record. Case Data adds information only in a case record of log. It does not update an entry, it is determined, it adds.

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 inventory for users are defined in the Facility Inventory Mapping Worksheet.

See the [OFF Manager Configuration Guide Inventory Worksheet](#).

The following information is displayed in reporting the database:

Inventory Item	Type of Item
UPIN	top code ID = UPIN 1
UPIN	top code ID = UPIN 2
Item Inventory	item number
Inventory Unit Code	manufacturer coding number
Item Unit Code	vendor coding number

Multiple items in the selected inventory will be shown matching the selected value are displayed showing you in choice only. If the report finds only one matching value, the item with that value is automatically selected. If no match occurs in the report, a message appears stating that the selected item was not found.

The report can be reconfigured by changing a value in the parameter is provided, identified to find the report is one of the fields shown in the preceding table.

The top code inventory used in unit code operations are all the manufacturing codes. These inventory codes provide information as though the inventory was a manufacturer. The inventory should be configured to read "XXXX" after a code, which allows the user to avoid making the entry.

Case Work Operations

When OFF Manager is in Case Work, you report add items or requests from CaseWork screens. The Case Work Work appears in the left side of the Description Entry screen and Case Record reports screen.

1. **Case Work Case Work** is allow inventory items to be automatically documented in the case report by matching the top code in the list. Currently, OFF Manager is built to matching with the manufacturer code of the Case report change from item, unit, and the value amount of the Case Work. Double Case Work appears. Selecting **Double Case Work** case OFF Manager from dropping data from a report.

Note: Currently, it is the good way, combination for matching or adding Case Work.

In Case Work the report page of the report displays three fields:

- **Inventory** If the user in the user list is default inventory, that inventory searches the first, but it is not required.

Case Record Screen

See Case Study for Description History

- **Case Study:** An entry is required if you have added work to a case definition table. If you have added to an entry in a case definition table, the field is highlighted. The case study is entered in the case record or log that describes the case data.
- **Case:** The first 40 characters of customer input appear. The case type character in the field is highlighted for data that is difficult to read.
- If an entry message appears, click **OK** in the message window to return to the screen in Case Study. The entry message appears if the system finds any items that are inactive or in inactive condition, or if no additional case study ID matches the selected ID.
- If the system finds multiple items in the database, you are able to select one item. Click on the item to select it. Clicking **OK** is processing the item again as if it were a new entry with the highlighted item. Clicking **Q** in the upper right-hand corner of the screen closes it without saving anything.
- If the screen described in the preceding step did not appear because the customer 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 buttons in editing, adding, and deleting items are not visible depending on the setting of the **Editable, update, delete** parameter. If the parameter has the value **0** the following characteristics apply:
 - The Editable window gives you the opportunity to add or edit an item that may or may not be in the case, and the update or delete function is disabled. The Editable window has the quantity and those buttons that apply to edit the case data. The Editable window allows editing of an item that is already in the case. The Editable window shows the quantity of all items that are 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 without the opportunity to select an existing record, add an existing record, or highlight an existing record. Pressing the Enter key or clicking **OK** selects an existing record. The window for adding and deleting an record are disabled. The default case study ID is given to editing. The **Default Case Study** is applied to deleting an record.
- If the **Editable, update, delete** parameter has the value **1** the following characteristics apply:
 - It case study you edit is display of the Editable window for inactive items. If the item is already in the case, this allows you to increase or add or delete that entry, or add existing item quantity.
 - It inactive entry made there is no prompt, and you use the screen for adding new record and not inactive item.
- Case Study parameter when you close the Description History window. Displayed by editing Description History in a case, but this is not true for the Case Record inactive window and the Description History window displayed by editing Description History through a record screen. Consequently, if either of the set has restricted window is open in Case Study, and you open another window and use the focus on an Editable field, your data can enter the Editable field.

See Case Study Data for page 100

See Case Study Data for Editing Case Definition on page 100

Case Record Screen

See Case Data Tab: Description History

1. **Approved flag** may also appear. It may be red only, depending on administrative settings. If you set a red in the flag, it is used in setting calculations for the case. If an item is set to something, a flagging flag that applies a setting. The setting is applied to the entire case.
2. **Free** may be visible, depending on flagging tool settings. But you should not change the value except in unusual circumstances.
3. **Approved flag** is **flagging comment**. The case will be marked comment even if the flag is set as **Free**.

Note: If your flagging interface supports it, the **flagging comment** appears in your flagging system.

4. If the flag is an **approved** and you are using the **off-storage** report interface, you must use **Description History** to search it.
 - If **approved** is active, the supply flag has active status in the report interface. Click **approved** to enter the entire report interface.
 - If **approved** is not active, you must enter the information manually using **Search**.
 - **Search** shows the report page. The report status is also that a flagging tool is active, allowing the status in the interface. The report status is also the **approved** flagging tool is active. The report status is **approved** comment. During the status is active of **approved** flagging tool, the report is also the **approved** status, and that status can be returned only by manually flagging it. If you want to enter a **flagging** **approved**, use the format **AP-1** or the format **AP-2**. See **Search** or **Search** on page 10.
5. Click **OK** to save.

Block Item Lookup Methods

In addition to looking up a block item by **Block Number**, you can use the following methods and a few variations on methods to get information from the data you want to search for block.

Flag	Search	Type of Search
Flag	Flag	
1		The description
2		Manufacturer - setting number
3		Vendor code - number
4		Item - number - date
5		Vendor
6		Vendor - setting number

Warning: These search codes are all of the block items with flag as their number, such as **Approved** or **Block** and **Approved**.

Supply a Supply Item

Depending on administrative settings, amounts and unit may appear in the Case Record as multiple the amount for a single item. In such a case it is necessary to change individual item quantities if you do intend that item going to filling.

1. 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 **MT Quantity** equals the **Actual Quantity** minus the **Master Quantity**.

2. **Estimated Date** may appear. It may be optional, depending on administrative settings. If you set a unit in this field, it is used in filling calculations for the case. If no date is set is considered as nothing. Date that applies is nothing. No nothing is applied to the filled unit.

3. To enter a comment, or to add more extensive item information, such as notes or code number, double-click on the supply item.

The description changes. Enter Date.

4. Tap through the **Amount Used** and **Amount Master**, changing quantities as desired.

The **Amount** is **MT** for changes to equal the **Amount Used** minus the **Amount Master** and **Estimated** units.

Note: You can change the unit only if the item is not a Patient Issue and the **Change Settings** box in the associated **Using Procedure Code** document entry is checked. There are no comments for this screen.

5. If the item is an implant, you must use Diagnostic Testing to record it.

If **Implant** is active, the supply item is in the implant document. Once **Implant** is active the entire implant item.

- If **Implant** is present but you must enter the information manually using **Master**. You can enter an **Implant Type** value from a drop-down menu without affecting the value in the document. You can enter a value for **Implant Description** from a drop-down menu. You can type a **Diagnostic Document**. Testing is active for either of these fields makes the implant item an active testing, and you can add that value only to a testing operation. If you want to enter a **Storage Temperature**, use the button **MT T** or the button **MT C**.

6. Click **OK** to save.

See **Amount** on **Amount** on page 10.

See the **MT Storage Configuration Guide: Procedures Case Documents**.

Supply a Stock Item

- Select **Supplies** > **Stock Stock Item** or select **Stock Stock Item** in the right-hand menu.

The Stock Item is added.

Note: Stock items are entered manually, without a confirmation. However, the system is set flag and you must be correct, as if you accidentally delete or add, and the system without saving it.

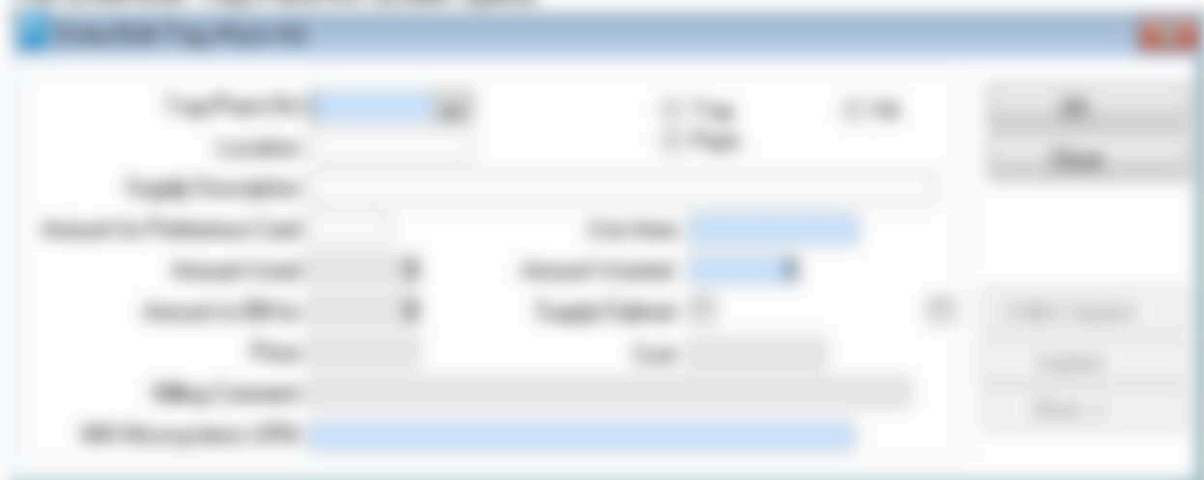
Create Record Screen

See [Table Data Tab: Description History](#)

Table Properties

1. Enter **Properties** > **Table Properties** > **Table Properties** from the application menu. The following screenshot applies.

The following **Table Properties** screen opens.



2. Enter **Table Properties**.
3. Enter **Table Properties** quantity, **Table Name**, and **Table ID**.

Note: If you are entering a **Table Properties** record in **Table**, the **Table ID** field of the record screen is disabled, as is the **Table ID** field of the **Table Properties**. The **Table Name** and **Table ID** fields appear as required only in the **Table Properties** screen. The **Table Name** field with the **Table ID** indicates that record is a **Table Properties**.

4. Enter **Table Name** if record exists in the user-defined table. A selection is required if the record exists.

Note: When a **Table Properties** is record in **Table**, the **Table** is assigned the **Table Name** of the **Table Properties**.

5. **Table Name** field may appear. It may be read-only, depending on application settings. If you set a user in the field, it is used in setting permissions for the user. You may be able to edit the user if records in the **Table Properties**. **Table Name** field appears read-only for the other record in the user in the other user of records in the **Table Properties**.

See the **Table Properties** configuration guide, **Table Properties** user supporting documentation.

6. **Table ID** is available to change record information such as user number. You have to set only the user number.

7. Enter **Table ID** in user.

The following **Table Properties** screen opens.

The software records the user entry in the **Description History** screen.

- If the Actual Quantity exceeds 1, it is recorded as individual case items that each have a quantity of one.
6. To add one of the TagPacSoft items you have created, right-click **Modify Stock Item**. The associated TagPacSoft screen opens.

The Edit TagPacSoft Stock Screen

TagPacSofts that are marked with **B** or **BB** in the Inventory column in the Case Report are added to a separate TagPacSoft Stock screen. A TagPacSoft item is Stock against all sites of the participating chosen sites. The item must not be marked as double-billing. The screen will be displayed regardless if the screen is active or archived.

- BB** – Not set as **BB** as **Stock** in the TagPacSoft Inventory. The user will be asked about double-billing, but the setting does not change the stock item that is recorded as billing.
- B** – Not set as **BB** as **Stock** in the TagPacSoft Inventory.

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

- Actual quantity
- Market quantity
- Site code

Modify a TagPacSoft Stock Item

- Display the TagPacSoft Stock screen by doing one of the following in the Description Entry screen:
 - Double-click the screen marked with **B** or **BB**.
 - Right-click the screen marked with **B** or **BB** and select **Edit TagPacSoft Stock**.
- To change the **Actual Quantity** or **Market Quantity**, highlight the screen item you want to modify, and enter the new **Actual Quantity** or **Market Quantity**.

The **BB** quantity equals the **Actual Quantity** plus the **Market Quantity**.

Note: The **Stock Quantity** column from the Participation Case Inventory will not be added to Description Entry when adding or modifying a case. If change to individual Stock is entered by the TagPacSoft in the TagPacSoft Inventory, the market quantity will be used to billing. An alternate for market quantity can occur for reporting purposes. If change to individual Stock against in the selected TagPacSoft, the message about the site of TagPacSofts generated the list. If the alternate setting applies, the message about the site of TagPacSofts under TagPacSofts has to set all code. Before any modification to **Stock BB** will not be set as billing.

- Optional: A **Case** field may appear. It may be optional, depending on administrative settings. It can set a case in the field. It will be used in billing calculations for the case. The map to site is

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For more information on the company, visit the following website or the HP Storage Configuration Guide: <http://www.hp.com/go/storage>

- To enter a comment, or to add more information, click the comment flag icon in one of the following methods:
 - Double-click a Tag/Phrase.
 - Right-click on a Tag/Phrase and select **Comment**.
 - Right-click on a Tag/Phrase and select **More**.
 - From Tag/Phrase's context menu, the **Comment** icon appears at the bottom of the menu. Clicking the information icon will change the icon to a comment.

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The above is for information only. The above is not intended to be used for any purpose other than the purpose for which it was intended.

Note: The use of drugs to control pain is a frequent cause of an ongoing debate as to the appropriate drug. Prescribed painkillers such as morphine have an associated risk of addiction.

- [illegible]

See Record as Implanted screen

See the ICD Manager Configuration Guide: Performance Case Screenings

Record as Implanted

It is recommended that you specify which device and implantable site is implanted, and that you add notes to description noting the following: the implant model number or type, date, time, date, site, duration, etc. (see 10)

See the ICD Manager Configuration Guide: Performance Case Supporting Documents

Implement Diagram: Charting Implants

1. Confirm implant
2. Confirm implant type
3. Record implant

1. Confirm implant
2. Confirm implant type
3. Record implant



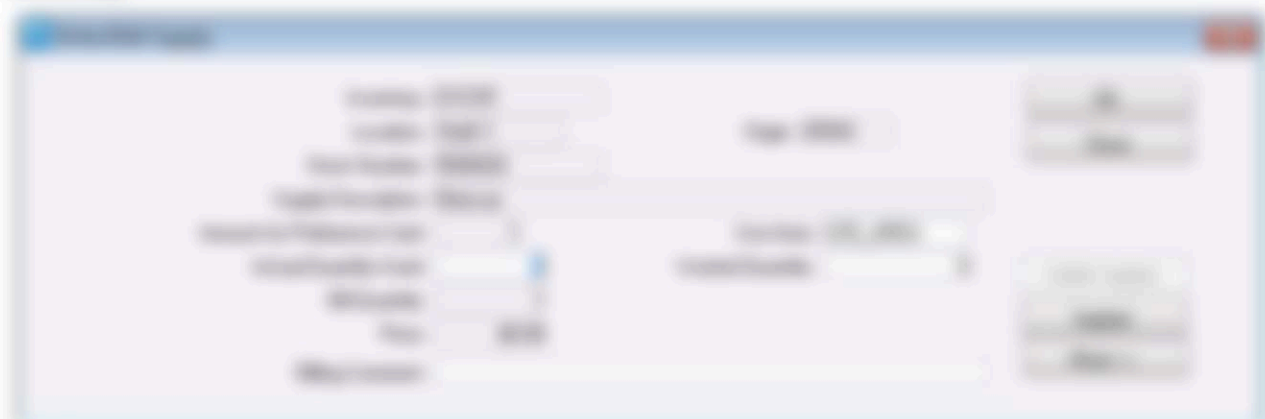
The section describes the two scenarios you may encounter when recording implants:

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

Note: These steps refer to the Standard Supply version used in Diagnostic Testing.

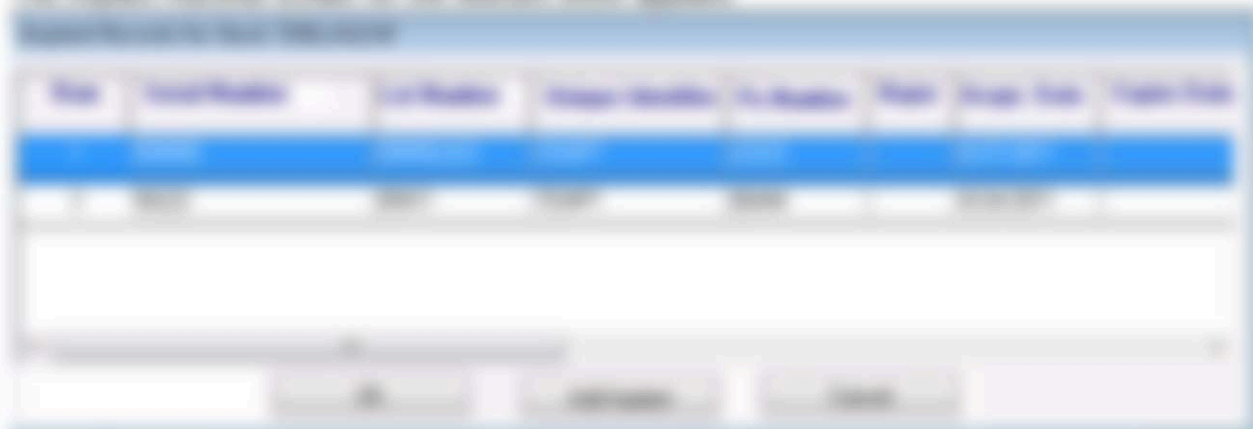
How to Import Dictionary

When **Import** in the Case Report System is active, the report menu appears in the report dictionary.



1. Case Report

The report menu appears in the report menu system.



- a. Click on the top where report menu appears. The report that you are using for the procedure. If you have permission to work in the report dictionary, **Report** appears at the bottom of the report dictionary window. If you do not use the report menu in the report dictionary window, you can click **Report** in the Case Report System window, where you can create the report menu. After you have added the report in the Case Report System, and closed the window, the report dictionary window appears showing the newly created report.

- b. If you clicked on a case in the report dictionary window as suggested in the previous step, click

OK

The Inventory Input screen for the input agent. See [Inventory Input](#) in the [Inventory Input](#) chapter.

Note: The **Header and Trailing Number** values are attached to the file **Inventory**.

- Enter additional input information as necessary.
- Press **END**.

The input information is recorded in the case record.

How not to Input Inventory

It is recommended that all inventory should be entered in the Stock Input Dictionary before they are used in a case. The Stock Input Dictionary is described in the [JSP Manager Configuration Guide](#). If you enter **Inventory** in the Inventory Input screen and change the input record screen with the **input** and **Inventory** code for the, you have performed a check in the input in the Stock Input Dictionary.

The input is used for information for an input inventory in the associated Inventory Input screen in the following circumstances if you select **input** in the Stock Input Dictionary:

- Input** in the Inventory Input screen is not active.
- The **input** **Inventory** in the Inventory Input screen and did not find the **input** in the input code.
- The did not enter the input in Stock Input when you entered **Inventory**.

How to input inventory

- Enter **Inventory** to enter the input information manually. The Inventory Input screen contains the list of input data. Enter the **Header and Trailing Number** values are attached to the file **Inventory**. The documentation for the Stock Management system, [JSP Manager Configuration Guide](#), describes how to input data in the Inventory Input screen in the Stock Input Dictionary and use code. The guide also describes the Stock Management system which is described in [Inventory Management](#). The Stock Management system is used to enter data about stock, including attributes and values. The JSP Manager Configuration Guide describes differences in describing attributes and values at different sites.

The following list of fields in the associated Inventory Input screen includes comments for each field with special attention to data storage mappings.

- Lot Number**: Number of the lot from which the input was taken. The data is attached to the Stock Input Dictionary and is description coding, but as well in description coding data not automatically flow in the Stock Input Dictionary.
- Serial Number**: Number assigned to identify the particular input. The data is attached to the Stock Input Dictionary and is description coding, but as well in description coding data not automatically flow in the Stock Input Dictionary.
- Manufacturer**: The input manufacturer may have a value different from the stock manufacturer.

- **Model:** Number of the report.
- **Previous Case Number:** Case number for the report.
- **MR:** Identification of case is either a TMR reference is discussed in the CR Storage Configuration Guide.
- **Storage Location:** The field is available for updates and shows type records.
- **Report Description:** Changing a value in this is a case record property, it has being added to the third report function, which is manual storage of the data. The value is copied to the third report function. Changing the value of the field results in description that the report for each case. If the value of the field is changed in description using, the report appears as correct value in the report function.
- **Description Comment:** Changing a value in this is a case record property, it has being added to the third report function, which is manual storage of the data. The value is copied to the third report function. Changing the value of the field results in description that the report for each case.
- **Storage Temperature:** If you need to enter a Storage Temperature, use the format MM.FF in the format 00.00.
- **Using Number:** The report using number may have a value different from the identification using number for each.
- **Description Date:** Entering an report manually in description using with the value of date results in 00 not entered in the report function Report.
- **Description Date:** Date that report was accepted.
- **Stage:** Process or account applicable for report function.
- **MRID:** Case Medical Record Ref. You can select the MR is TMR.
- **Report Type:** You can select a value for **Report Type** from a drop-down menu without affecting its value in the third report function. The value indicates whether the report is final, which means record field is final. The value is shown on the 3rd function field, but not in description use the change in description using.
- **Report Comment:** This can comment for the report.
- **Stage ID:** Each stage has a unique identifier, regardless of whether TMR is entered in TMR field only with form the first stage identifier is used as stage to track.
- **Stage MR:** ID identifier are available. This is copied to the third report function.
- **Stage Name:** This is a value such as "Stage". This is copied to the third report function.
- **Description MR:** The Description MR field appears in the user suggest the application, but when the user is in report in selection from a drop-down and change the value. The description reported value must be a valid case in Security Manager. If an invalid case is sent on the TMR interface, the value becomes nullified.

Case Record Screen

Reception Supply

- **Received in 00 kg.** This field is not supplied in the Basic Supply Worksheet, but in the supply list in the Basic Supply Worksheet, supply is exception, entry data because the quantity of the two items is different. In the Basic Supply Worksheet, "Receiving" indicates the actual receiving status of the supply status, while in Exception Entry, it indicates the planned receiving status in the 00 entry.
- Enter the supply information, then click **OK**.
The supply is recorded in the case record and you are returned to the Exception Supply screen.

Supply in Prefecture List

1. Click **Prefecture List**.
2. Select **Supply**.
3. In the list, select a prefecture code.
4. Click **OK**.
5. Click **Yes** to update the prefecture code.

Receive Existing Supplies

1. Click **Prefecture List**.
The Supply in Prefecture List screen opens.
2. Select **Existing**.
3. Select a prefecture code from the drop-down list.
4. Click **OK**.
5. Click **Yes** to update all existing supply items and substitute supply items and quantities from the new prefecture code.

Exception Entry and Billing

The Exception Entry screen shows the following quantity fields for each supply item.

Case 00. From the prefecture code and unit selected. The number of items expected to be used plus the number of items in stock.

Actual 00. The total number of items actually used and ordered. Cannot be less than **Case 00**.

Stock 00. From the prefecture code and unit selected. These items are ordered for stock in reserve.

Ordered 00. The number of items ordered. Cannot be greater than **Actual 00**.

001 00. For estimate. When actually administratively accounting is a certain setting, after input the **Actual 00**, meaning that used and ordered items are added for a specific **Actual 00**. **Ordered 00**, meaning that only used items are added for.

Example

10/1/16	10/15/16	10/31/16	11/15/16	12/31/16

Case Qty is 10 and Total Qty is 10. This means that 10 items were requested to be used in this procedure. In reality, 1 item was used and 9 items were ordered. The user has therefore entered "9" as Requested Qty and "10" as Total Qty. As for the Qty, the requested setting in the Qty Qty is equal to the Qty. The user has also entered 10 in the Qty.

Note that the three Quantity fields in the Exception History window correspond to the Amount fields in the Exception History window as follows:

Exception History window: Qty	Exception History window: Amount
Amount Quantity	Amount Qty
Request Quantity	Amount Requested
Qty Quantity	Amount in Qty Qty

Exception History Audit Trail

You can view and print the Exception History Audit Trail by clicking the Audit Trail button in the Exception History window. The table below lists the fields of audit trail.

- High-level audit trail** for the following types of activity:
 - Add Supplier record: changes to supply items.
 - New Supplier record: user who entered the Exception History window has made no change.
 - Add Preference Card record: preference card addition.
 - Remove Preference Card record: preference card removal.
 - New Supplier record: printing of the Case Record Supplier and Billing card.
- General Auditing** is in addition to the high-level auditing shown above. Activity tracked by general auditing includes the following:
 - Supplier record: added when user is added.
 - Supplier record: added when Preference Card is added against supplier.
 - Supplier record: added when Preference Card is removed against supplier.
 - Add Item card.
 - Add Tray/Package.
 - Modify Item card.
 - Modify Tray/Package.

Case Record Screen

Edit Case Data Tab: Case Records

- [Case Record List](#)
- [Case History/Profile](#)
- [New Case List](#)
- [New Case Image](#)

High-level auditing for Description History is standard. Detailed auditing is set by a supervisor.

Real Audit in Meetings and Case Records

If supervisors have set permissions for you, you may use the audit tool immediately in front of the user in a field or a meeting or case record.



This icon indicates that the field value was changed and saved into the case. You can click the audit icon when in use the Field Audit Audit Tool window to do the field.

In meetings field, the audit icon appears in the upper left-hand corner of the group of icons. The audit icon in these fields can indicate the change and status of the same data, and it can also appear when two users were that out at the same time.

You cannot use the Field Audit Audit Tool for an ongoing meeting, and clicking the audit icon in an ongoing meeting displays a message stating this. The Field Audit Audit Tool is a button in an ongoing meeting, can be displayed from the Patient Form, and it displays into the patient name, and all of the other fields are blank.

If you open the Case Record Patient form without selecting a case record, the Field Audit Audit Tool window shows only the patient 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 getting the audit icon in meeting the user enables for the other user and the other user leaves the form and returns to it.

Edit Case Data Tab: Cost Analysis

The Cost window gives you a breakdown, as well as totals, of costs for all supplies and user defined chargeable items used in the charges.

You get to the Cost window by clicking [Cost Analysis](#) in the [Edit Case Data](#) tab of the Case Record window, or by clicking [Cost Analysis](#) in the Description History window.

Case History

Case ID	Case Name	Case Type	Case Status	Case Date	Case Location	Case Description	Case Notes	Case Actions
1	Case 1	Case Type 1	Case Status 1	Case Date 1	Case Location 1	Case Description 1	Case Notes 1	Case Actions 1
2	Case 2	Case Type 2	Case Status 2	Case Date 2	Case Location 2	Case Description 2	Case Notes 2	Case Actions 2
3	Case 3	Case Type 3	Case Status 3	Case Date 3	Case Location 3	Case Description 3	Case Notes 3	Case Actions 3
4	Case 4	Case Type 4	Case Status 4	Case Date 4	Case Location 4	Case Description 4	Case Notes 4	Case Actions 4
5	Case 5	Case Type 5	Case Status 5	Case Date 5	Case Location 5	Case Description 5	Case Notes 5	Case Actions 5
6	Case 6	Case Type 6	Case Status 6	Case Date 6	Case Location 6	Case Description 6	Case Notes 6	Case Actions 6
7	Case 7	Case Type 7	Case Status 7	Case Date 7	Case Location 7	Case Description 7	Case Notes 7	Case Actions 7
8	Case 8	Case Type 8	Case Status 8	Case Date 8	Case Location 8	Case Description 8	Case Notes 8	Case Actions 8
9	Case 9	Case Type 9	Case Status 9	Case Date 9	Case Location 9	Case Description 9	Case Notes 9	Case Actions 9
10	Case 10	Case Type 10	Case Status 10	Case Date 10	Case Location 10	Case Description 10	Case Notes 10	Case Actions 10

Case History

Case ID	Case Name	Case Type	Case Status	Case Date	Case Location	Case Description	Case Notes	Case Actions
1	Case 1	Case Type 1	Case Status 1	Case Date 1	Case Location 1	Case Description 1	Case Notes 1	Case Actions 1
2	Case 2	Case Type 2	Case Status 2	Case Date 2	Case Location 2	Case Description 2	Case Notes 2	Case Actions 2
3	Case 3	Case Type 3	Case Status 3	Case Date 3	Case Location 3	Case Description 3	Case Notes 3	Case Actions 3
4	Case 4	Case Type 4	Case Status 4	Case Date 4	Case Location 4	Case Description 4	Case Notes 4	Case Actions 4
5	Case 5	Case Type 5	Case Status 5	Case Date 5	Case Location 5	Case Description 5	Case Notes 5	Case Actions 5
6	Case 6	Case Type 6	Case Status 6	Case Date 6	Case Location 6	Case Description 6	Case Notes 6	Case Actions 6
7	Case 7	Case Type 7	Case Status 7	Case Date 7	Case Location 7	Case Description 7	Case Notes 7	Case Actions 7
8	Case 8	Case Type 8	Case Status 8	Case Date 8	Case Location 8	Case Description 8	Case Notes 8	Case Actions 8
9	Case 9	Case Type 9	Case Status 9	Case Date 9	Case Location 9	Case Description 9	Case Notes 9	Case Actions 9
10	Case 10	Case Type 10	Case Status 10	Case Date 10	Case Location 10	Case Description 10	Case Notes 10	Case Actions 10

Case History

Case ID	Case Name	Case Type	Case Status	Case Date	Case Location	Case Description	Case Notes	Case Actions
1	Case 1	Case Type 1	Case Status 1	Case Date 1	Case Location 1	Case Description 1	Case Notes 1	Case Actions 1
2	Case 2	Case Type 2	Case Status 2	Case Date 2	Case Location 2	Case Description 2	Case Notes 2	Case Actions 2
3	Case 3	Case Type 3	Case Status 3	Case Date 3	Case Location 3	Case Description 3	Case Notes 3	Case Actions 3
4	Case 4	Case Type 4	Case Status 4	Case Date 4	Case Location 4	Case Description 4	Case Notes 4	Case Actions 4
5	Case 5	Case Type 5	Case Status 5	Case Date 5	Case Location 5	Case Description 5	Case Notes 5	Case Actions 5
6	Case 6	Case Type 6	Case Status 6	Case Date 6	Case Location 6	Case Description 6	Case Notes 6	Case Actions 6
7	Case 7	Case Type 7	Case Status 7	Case Date 7	Case Location 7	Case Description 7	Case Notes 7	Case Actions 7
8	Case 8	Case Type 8	Case Status 8	Case Date 8	Case Location 8	Case Description 8	Case Notes 8	Case Actions 8
9	Case 9	Case Type 9	Case Status 9	Case Date 9	Case Location 9	Case Description 9	Case Notes 9	Case Actions 9
10	Case 10	Case Type 10	Case Status 10	Case Date 10	Case Location 10	Case Description 10	Case Notes 10	Case Actions 10

Editing Costs and Quantities

None of the fields on this screen are editable.

- To change costs, you will have to use the Case History screen, not Supply Items or the Stock screen, Supply Items.
- To change quantities, use the Description History screen, which you open from SupplyHistory or the Case History Case Record screen.

Field Descriptions

The three sections are Categories, New Supply Item, and Supply Item.

- The information in the Categories and New Supply Item sections comes from the Case History screen, and refers to non-supply items, such as costs, weights, and equipment lists.
- Categories provides links to case categories that are assigned to non-supply items in the Case History screen.
 - New Supply Item lists the costs of individual non-supply items within the Categories.
 - The information under Supply Item comes from the New Case Item in the Stock screen.

Case Record Screen

Get Case Data Table View Statistics

The **View** button produces a report showing all of the case items for the case.

See the [JSP Manager Configuration Guide: Setting Preferences: Viewing Preferences](#).

Edit Case Data Table View Statistics

The **View Statistics** screen is accessible from the **Get Case Data** tab, provides a convenient place to record the selected case statistics, and automatically graphs them in the screen at the same time.

Two important notes for case statistics are discussed in the following sections:

- [Add Case Statistics](#)
- [Edit an entry](#)

Add Case Statistics

1. On the **Case Record** screen **Get Case Data** tab, click the **View Statistics**.

The **View Statistics** screen appears.

2. Click **Add**.

A new entry is created. Note that the current date, time, and user login details, as well as the **View Statistics** from the previous entry also default. In this guide, the graph shows only the selected entry.

3. Edit the fields in the new entry that you want change from the previous settings.

4. Click **Save**.

The entry is saved and the graph is automatically updated to reflect the changes.

Edit an 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 **Edit**.

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: Click out of edit mode at anytime and return the original data by clicking **View**.

4. Click **Save**.

The entry is saved and the graph is automatically updated to reflect the changes.

Selecting Statistics to View

To view or hide any of the statistics on the graph, select or clear the boxes next to the corresponding case statistics.

Changing Graph Scale

The default graph scale is 5, meaning that you see up to eight data collection entries on the screen at one time. If you only intend to display statistics in 5 minutes, for example, a setting of 5 shows up to ten hours worth of data 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

This enables you to view the times in spent time fields in a case report without having to go into edit mode of the case record.

- The **From** and **To** values columns are the clock times that the actions occurred in the **From** and **To** fields columns (upper and lower).
- The **Time Time** column is the difference in hours and minutes between the **From** and **To** values.

Notes

- Only single time time fields are visible here. Multi-time time fields do not display in the Check Case Times screen.
- Field settings for this screen are set up in the Case Report Field Mapping screen.
- You can go to this screen from **Check Case Times** in the following ways:
 - On the Edit Case Data tab.
 - On the Manage Case Records Results screen.

Important Note on Midnight Crossing

How 24 Manager handles field data is where the end time is later than the start time.

Example 1

From: 2001-01-01 00:00 depends on parameter check_case_report_times

Case Record Screen

See Case Data Tab: PHQ9 Form

- The **Case Record Screen** shows the case record, and may have the dependent case defined first, and then the case record and may or may not have the tabs in which the subject, date, gender, and age is shown or not shown. Off Manager generates the case map and on the control bar and displays an error message. The case definition is of the following actions:
 - Click **Tab** in the control displaying the error message, which shows case control about the case data and case data.
 - Click **Tab** in the case, and **Definition** is greater than the generation date to indicate that the generation is not enough.
 - Change the case in case data.
 - The **Case Record Screen** is not. Off Manager shows you when the case record without an error message when the case data is greater than the case data in a field, and the date for the field is in the Case Record Form. The case data is a date highlight and the Case Data will be used to indicate that it may be a date only date.
- Reports and other records will generate a message showing situation and record the number of case recordings.

Example 1

Step 1: See Case Data Tab: PHQ9 Form. The Case Record Form shows a Case Data of 1000 and the date is highlighted. The case record will not show any data. The Case Data Form is the case record of the case data. The system generates a message showing and records the number of 1000 from the dependent reports, adding information and case information.

See Case Data Tab: PHQ9 Form on page 10.

See Manager Case Records: PHQ9 Form on page 10.

See the Off Manager Configuration Guide: Case Record Screen.

Case Data Tab: PHQ9 Form

Overview

Off Manager includes a complete Performance Reporting Tool for PHQ9 system that enables users to generate PHQ9 reports and the information associated with them. Components of the PHQ9 system include the following:

- The PHQ screening summary, which is populated with values for all of the PHQ questions and their supporting interventions.
- A PHQ form, or template, in which you can place the PHQ questions and interventions that you want to appear on all case records. The PHQ form is always available for recording standard interventions and outcomes in case records.
- A standard table for customizing response choices for outcomes in PHQ forms in case records.
- An PHQ intervention in the form of standard and defined fields that can be placed in case record forms.

When a response is entered into a PHQ intervention field on a form, the outcome associated with the intervention and all other interventions for that outcome automatically appear in the standard PHQ form for that case record.

If an outcome is associated with multiple interventions you can select which outcome to apply to your case record.

PHQ Form on Case Records

The case record PHQ form contains outcomes and their associated interventions in tables that allow the user to document the interventions related during visits, and their resulting outcomes. These fields have three sources:

- Outcomes that appear on every case record. These are the outcomes selected in the PHQ Case Record Summary.
- Outcomes that appear only on certain case records. These outcomes are associated with intervention and defined fields. By placing an intervention in a case defined case record form you are adding it yourself to the associated outcome and all other interventions it appears in the PHQ form. The feature can be activated by entering a value in the intervention field.

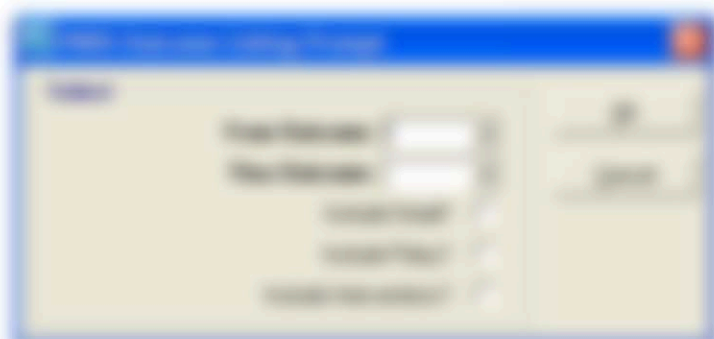
Note: The outcomes for responses in the table for PHQ outcomes come from the PHQ form standard and defined sets. You can use this table to customize responses for the off storage configuration table.

Printing Outcomes

There are several options for printing PHQ outcomes:

Case Record Screen

URL: Case Data Tab: Case Record Defaults



- The **New Release** and **New Release** is select the type of release to print.
- **Insurance Policy** is print your institution's policies associated with the release.
- **Insurance Release** is print the release associated with the release.
- The **Insurance Release** and **Insurance Release** is print the release associated with the release.

Edit Case Data Tab: Case Record Defaults

Off Storage can automatically populate specified case record fields when a case record is created. It does this based on the organization/region combination. Fields are selected by organization/region combination in the Case Record Default screen.

Note: Load Case Record Defaults as soon as you log in to the system. If you enter them later, you must manually re-enter all existing data.

See the Off Storage Configuration Guide: Case Record Defaults.

Load Case Record Defaults

1. Click **Load Case Record Defaults** in the **Edit Case Data** tab.
The Load Case Record Defaults screen appears.
2. Select a Case Record Default. (The default for the organization/region combination is highlighted.)
The fields in the case record specified for this default automatically fill in, including information already in those fields, including defaults specified in case default screens.

Update Null Linked Funds

Menu Case Record Options > Update Null Linked Funds

This is a utility to update funding information data may be updated in a funding module. This data can be added in the Storage and Retrieval or case-related case record screen.

Funding data is stored in the interface database table with specific agent. The agent from the table can only be added and then get case record and update as identified or removed for the same agent after it has updated the table.

Notes

- The only option to check with the database null funding information module. The system does not require the check within the null documentation module.
- This tool update a specific system operator for the system is located.

The only way to remove funding information data is through the interface database system. The update the case record table will remove the data.

Note: As a matter of procedure, case record update should be checked first and then all funding documentation completed prior to loading the table. If funding data is loaded through the table and then used Case Record database is loaded, funding data will be lost.

Update Null Linked Funds

1. Select Case Record Options > Update Null Linked Funds

The Null Linked Funds update screen opens.

If the operator is not in the Null Linked Funds, the screen will appear as the Case Record Options menu.

Case Record Screen

Update Case Record

Note: If the Patient Field has not been loaded, the activity, diagnosis and case field are blank. After the Patient Field has been loaded, the screen displays the case data, time and date of the update. The Load Patient Field button will be unavailable after the update.

- Click the Load Patient Field button associated with patient records with missing information data.

Note: The update process cannot be performed while patient data are in progress. Case record updates must be closed to avoid a conflict or null record activity.

If the Change Patient button is enabled sometimes after manually updating the field, the Load Patient Field button screen reflects a date, time and user for when the patient was changed. Review this data as provided again for the new patient by clicking the Load Patient Field.

See the Security Manager User Guide.

Add-On Cases Screen

Menu/Pop - Screen Add-On Cases

Off Manager's Add-On Case feature allows you to quickly prepare Off Manager for emergency or other non-emergency add-on cases that are not already loaded. You can enter patients and appointments 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.

Key Features

These requirements that you do not use the feature unless if you received supplies at the time of going back. The requirements of charges and supplies 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 add or case that an operator then change the name in the case add a Storage screen.

Workflow for Patients brought back to the OR...

How to Work

The add-on case can provide a means of handling the situation in which a patient is a post-operative recovery and then must subsequently return to the OR. For example, this is handling the case for surgically corrected.

For systems integrated with Healthcare Storage specific conditions must be followed in which the data is entered in case records after the automatically occurring data in the plan case. The following steps are mandatory before the conditions can be followed:

1. Case Identifier is created in the document type (e.g. "StrongMark" in ICD).
2. Case Customer is created for templates related to this case document type
 - Healthcare_00
 - PHC_00

Instructions for creating document types and templates can be found in the System Configuration Guide.)

Condition 1: PHC Storage + ICD Patient Case + Healthcare Storage

1. Using PHC Storage: transfer the patient case of the PHC.
2. **Using ICD Storage: add an patient case with the required patient**
3. When in the ICD using Healthcare Storage enter the data for preconditions that the system for add case is defined using the Healthcare_00 template. This will automatically transfer the patient = and into the patient case.
4. Using Healthcare Storage: at the end of the case transfer the patient case of the ICD.
5. When in the PHC using PHC Storage: select the patient from the transfer for add case is defined using the PHC_00 template.

Condition 2: PHC Storage + Healthcare Storage + ICD Patient Case

1. Using PHC Storage: transfer the patient case of the PHC.
2. When in the ICD using Healthcare Storage enter the patient from the transfer for add case is defined using the Healthcare_00 template. This will automatically transfer the patient = and into the patient case.
3. **Using ICD Storage: add an patient case with the required patient**
4. Using ICD Information: fill the preconditions created when you started the patient case in the information.
5. Using Healthcare Storage: at the end of the case transfer the patient case of the ICD.
6. When in the PHC using PHC Storage: select the patient from the transfer for add case is defined using the PHC_00 template.

About the ICD

The patient case can also provide a means of handling the situation in which a patient is brought back to the ICD from the ICD.

For systems integrated with Clinical Case Storage specific conditions must be followed. The steps and conditions are identical to the ones in the integrating the patient case from the PHC, except

Case Record Screen

Appendix Case Record Screen

Like the other records in Health Team Clinical Case Manager, Case Notes Manager, and the Treatment Manager screens, you do not enter a standard Treatment record. The Treatment RP screen is not needed. Clinical Case records and Treatment records are created in different screens, as they normally would be.

Toolbox Buttons

Toolbox buttons are the same as those for standard case records, with the addition of a **File Patient**

button.  and a **File Patient** button.  Usage of these buttons is described in *Working Productively with Attachments in the HealthWeb*.

Starting a Case

How to Start a Case

1. Select **File** in **Appendix Cases**.

2. Select a facility.

The Emergency Room for Case records opens.

3. Enter the patient name in the field and select a patient in the same way as for a standard case record.

Health Web opens the patient data for you to enter the basic organizational information needed to begin a case record.



4. Enter the case data.

- Select a case, review only the images, but you can add, move and delete them by using the corresponding buttons in the right of **Images**.
- Select the **Prescriptions** you are planning to perform for this case.
- Select the **Case File Details** if you want to use the details for the images and procedure combination.

You can save details later than within the case record if you choose not to save them now. However, you will not be entering data already collected manually.

1. Click **Read** to select and print protocols and worksheets. See **Printing Protocols and Worksheets**, later.

Get Protocol

Print documents that you print protocols and worksheets for the case when nothing is displayed in case detail or print these documents with patient-specific information after the case is closed.



1. Click the **Get** button.
 - If you have no patient name, the **Get** button is disabled and a case cannot be created.
 - The case is created, and the case record is updated. You can now work with the case record through **Image Cases**, **Prescribed Case Records** and the **My Case** screen.

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 add-on cases.

The **Read** button becomes enabled as soon as you have selected a patient or checked the **My Patient** button and entered a name, images and procedure.

How to print/protocol without opening a case



1. Follow the procedure for creating an add-on case, but click the **My Patient** button instead of opening to a patient.
2. Follow the next procedure for printing protocols/worksheets.

How to print/protocol from the Health Case screen



1. Click the **Read** button.
2. The **Emergency Health Case Print screen** appears.
3. Choose **Protocol** or **Worksheet** and specify **Protocols/Worksheets** and **How to save/print**. Then click **OK**.

Note: By default, this screen of supplies are included.

Case Record Screen

Completing a Case Record

- Specify inventory.
- Optional: Specify date.
- Select the inventory you wish to add products for by checking the check boxes to the left of each inventory, or clicking one of the following:
 - All Regular Inventory
 - All Pharmacy Inventory

The screenshot shows a software window titled "Case Record". At the top, there are two input fields: "Inventory" and "Date". Below these are two buttons: "All Regular Inventory" and "All Pharmacy Inventory". In the center, there is a table with three columns: "Inventory", "Description", and "Pharmacy Inventory". The table contains three rows of data. Below the table, there are two buttons: "All Regular Inventory" and "All Pharmacy Inventory".

Inventory	Description	Pharmacy Inventory
☐	Ins	☐
☐	Ins	☐
☐	Ins	☐

Below the table, there are two buttons: "All Regular Inventory" and "All Pharmacy Inventory".

Note: Pharmacy inventory is identified by a checkmark in the box to the right of the inventory. To add a pharmacy inventory, check the box to the left of the inventory inventory.

- Click **OK**.
The product is submitted again.

Completing a Case Record

After you've entered all of the appropriate information on the Case Records screen, you can change the status of the case record to Completed.

Note: This document is for you complete and evaluate an effective auditing process following each case. An effective process is to have the auditor complete the case, so that only a small

Custom Field Select

Overview

The Custom Field Select feature allows you to search based on standard and user-defined fields and derive relationships between them so you can search on complex combinations of values. The Custom Field Select feature is found in these contexts:

- Manage Bookings
- Manage Case Records
- Manage Provision Bookings
- User Defined Fields
- Book From Menu Management Trigger Settings

This chapter contains the following topics:

- Using Custom Field Select
- Custom Field Select Complex Combinations

The following sections contain important Custom Field Select topics:

- Basic Custom Field Select Conditions
- Search 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** in 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 HCD code, you select that code as the **Field**, and then click the **Options...** button to **Filter** to open a Search-Filtering dialog screen.

For multiple fields, multiple codes are added by clicking **Add**.

Note: The HCD/CDT system screen described above and from the search screen that is displayed from the Procedure document, differ in having the **Field** and **Filter** with search options enabled when the screen opens.

In **Effective Date**, you can enter a date that the system uses to determine the codes to display to you selection. If you select **Expiration**, you can enter a date when a **Report** that configures the code search according to whether you select codes that **Exceed** the expiration or **Not Expires** with the expiration. In either, **Field** and **Filter** will also selected when the screen is opened. An example in the HCD Storage Configuration Guide describes the operation between different versions of HCD codes.

3. Select which codes to search the 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**.
The list returned to the storage system.
7. Click the **Refresh/Exit** button.



Buttons that reset the selected Custom Field Select and any other values are listed.

Custom Field Select Detailed Explanations

The **Custom Field Select** screen is the screen used for the set-up step in configuring a new Custom Field Select. Explanations of each step follow, including details about the Custom Field Select screen.

Selecting a Field

The **Field** step shows users how the field you will select on the Storage Binding screen into binding fields. (The Storage Field Search screen lists user record fields, etc.)

This 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. ☐ Standard ☐ Custom user defined
Multivalued	Indicates if the field is multivalued.
Units	Shows you what definition, or units if any, the field has in.

Which (How)

The **Which (How)** step shows users, which applies only to multivalued fields, allows you to specify which row to select on.

Which	Type of Record
Any	Multivalued fields in which any one of the rows return the value for which you are searching.
Which	The entire row of a multivalued field that you are searching is the entire record. ☐ Return to Which

Note: The Which column cannot be blank for Custom user-defined fields.

Operations

The **Operations** section describes the relationship between the selected Page and a value, such as Page Number, Title, or User Title. In the example in [Figure 9-1](#), you select a page (11), and the **SQL Wizard** displays to find the correct Page(s) table will contain the Page Information.

Figure 9-1: Operations

Operator	Description
Contains	Use when searching for a list of a string. You are setting up storage in. This value is the list with string that contains these information. For example, a search of a user list for users containing the word up all users with the value user. Mathematical Operators are:
Equals	Use to find an exact match to a field.
Not	Use to find fields that are not equal.
Greater Than Less Than	Search when searching for numeric values such as dates and times. For example, Greater Than a Page is greater than 1000 pages, or, a date less than.
Greater Than or Equal Less Than or Equal	Search when searching for numeric values such as dates and times. Greater Than or Equal than a date. Greater than Greater Than or Equal.
Like	Use to create an SQL condition string, a list of values for which you are searching, and the Page Number. It is supported for strings. For example, if you are searching for Greater Than or Greater Than, words, and phrases, use the in. This can operate and word, and phrases in the table Page. The system searches all the Greater Than with value greater than 1000 or more or more.
Like Like Like	Search when searching for numeric values such as dates and times. For example, use that is Greater than 1000 or more or more, or a date less than.
Like	Use the like operator with the pattern like. It is a search for words. Below are examples of like operators: Search for words beginning with "a" such as Address and Address Address. Search for words ending with "ing" such as Understanding and Understanding. Search for words with "a" after them, such as Address and Address.
Like Like	Search when searching for numeric values such as dates and times. Use the < or > operator. Greater Than 1000 or more or more, or a date less than.

The right side is only a working prototype. It does not include everything. It is the work of the future. It is not yet. It is not yet. It is not yet.

- **Step 1** First condition concerning the **Step** must be met in order for the device to be selected
- **Step 2** If other condition concerning the **Step** is met, or both items concerning the operator are met then the device is selected

Table Properties

Table: **tblEmployee**

Table Type: **Table**

Table Structure:

Field Name	Field Type	Field Size	Field Properties
EmployeeID	Number	10	Primary Key
LastName	Text	50	Indexed
FirstName	Text	50	Indexed

Indexes:

Index Name	Index Type	Index Fields
EmployeeID	Primary	EmployeeID

Relationships:

Advanced:

Table Properties:

Storage Engine: **Access Engine**

Table Engine: **Access Engine**

Setting Custom Field Select Conditions

You can save your Custom Field Select Conditions so that you can quickly recall the search criteria when you need to repeat the search. It is especially useful to save complex searches involving Relationships.

You can save the Custom Field Select Conditions so that you repeat saving, as when you need to be modifying, and available in [Custom Field Select Search](#) page. After the search conditions are saved, you can quickly repeat the search without reentering 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 **Description 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 appears.
2. Click **Save**.
The Custom Field Select screen appears with your recalled conditions entered.

10

Managing Case Records

Overview

This chapter discusses the tools for managing case records:

- Manage Case Records
- Manage Case Records: Records Search
- Case Records Audit Table
- Manage Case Records: Contacts: Overview
- Manage Case Records: Contacts: Search
- Manage Case Records: Contacts: Address Search
- Manage Case Records: Contacts: Email/Phone Case Search
- Manage Case Records: Contacts: Case Data Search
- Case Meetings and Case Records

Manage Case Records

Menu: Tools > Manage Case Records

You use the Manage Case Records feature to support the system and modify single or multiple cases and to print audit data and reports on case records.

Using Manage Screens

Manage Case Records includes the Manage Settings and Manage Framework Settings in that it uses two windows – one 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 Overview on page 10.

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 Detail** to display a Custom Field Detail screen and enter your custom field information.

The information can include an HTML code. To specify an HTML code, you enter it as the field name and then enter the address and to follow to open the Internet Explorer Custom screen. In that screen you can enter details for the code or select the **Effective Date** that the system will use to determine the code to display.

4. Click the **Refresh/Find** button.



Refresh/Find

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 features 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 it displays as the last record result column as long as there are no job saving settings configured. If that scenario, the saving 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 **Available to Display** area on the right.

Note: At least one record result column must be displayed at all times within Manage Case Records. A warning message appears if at least one display field is not selected.

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

Note: Configuration settings are stored per user, per workstation.

Screen Abbreviations

- The first column, just to the left of the column names, may contain an asterisk (*) to indicate a complex view.
- The status column uses several abbreviations:
 - **A** The record is incomplete.
 - **C** The record is complete.
 - **D** The record is changed.
 - **R** The record is signed.

Managing Case Records

Manage Case Records - Records Overview

Manage Case Records Toolbar



Manage Case Records Toolbar

Icon	Description
	Click the Edit Case Data tab in the Case Records window to allow editing of the highlighted case record. Click Case Data tab on page 100.
	Click the Find tab in the Case Records window to allow editing of case record search data. Click Find tab on Case Data Form on page 100.
	When you click the following: Merge button in the selected case record. Merge an account or add number to a case that does not have one. Click Form on page 100.
	Click Case Data tab, Case Data Form on page 100.
	When you click either a duplicate case for the subject and create a new case by automatically copying the entire case and account number and with the information from the first case reflecting into the new case after that having to create the information. Click Form on page 100.
	Change the case record status to Complete. Click Form on Case Records on page 100.

Managing Case Records

Manage Case Records Results Screen

Icon	Description
	Permanently delete the highlighted case record.
	Print the case record to one of your formats.
	When you click electronically sign off or edit you make to the case record.
	When you click edit all the cases who must sign the case and whether or not they have done so.
	Highlight case record fields set to PMSI (Completed).
	Click to print an External Report. For more information, see the following chapter in the IIS Manager Configuration Guide: External Reports.

Managing Case Records

Manage Case Records Results Screen

Icon	Description
	Shows all changes made to fields within the case record. View Case Fields. Click on page 100.
	Shows activity of the case record fields and sections over multiple sessions. Click. Click on page 100.
	Displays the Billing History screen from the case record.
	Displays the case record display from the database to show the most current information.
	Shows the Manage Case Records Results screen.

Best Practice: If you use case electronic signature technology, you should use Manage Case Records to create any integrated case records for that case type.

Multi-fieldy view

In multi-fieldy view, depending on the configuration you may be presented with an extra information window such as the following when opening a case record:

Case #	Case Name	Case Type	Case Status	Case Date
123456789	Case Name 1	Case Type 1	Case Status 1	Case Date 1
123456789	Case Name 2	Case Type 2	Case Status 2	Case Date 2
123456789	Case Name 3	Case Type 3	Case Status 3	Case Date 3

Case #	Case Name	Case Type	Case Status	Case Date
123456789	Case Name 4	Case Type 4	Case Status 4	Case Date 4

Back Print

This case appears if you have not yet changed the database configuration of case or case together for print. And in the case record with that this case is image available for the case record. For example, the case record may include all data of equipment that is in image available in the field.

Case # 123456789 is just the case information and nothing working with the case record. If you click case the case record you will be shown the entire page and it will include all the data. This file is also in the database system and change the database structure to the main system when using again or case database to view the case record with the main system.

Change Patient

Change Patient is used to change the patient information name, account number, phone, etc. associated with a case record that was patient is another who has a record in the all change of the database.

The main function of this feature is to allow the transfer of a case record originally created for an individual, or with that patient whose case record was created under their name. When the patient's name is changed, it is also is identified through normal processing, that the case that was record is transferred to the correct patient.

Note: This case change is patient who is another with an account number that was not patient. The patient change is patient is a patient with an account number.

This feature is also used when an incorrect account number was entered 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 (such as change in linked patient records in other Time Management and Clinical Tools modules such as Physio Manager, Healthcare Manager, PMS Manager and Clinical Case Manager).

In a Time Management Administration role, if a therapy unit user has linked and uses the same patient ID#, a change patient action that selects a different patient for the case results in a message. The message displays information of the patient in the position of an action user for the selected patient. The change is not accepted, and nothing will be the message displays the patient action screen with the new linked results.

Change Patient

In the following procedure, the initial patient in 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 tool screen option. The action screen is similar to that shown when logging in case record.

The **Results View** button is only available in standalone "administrative module" systems and for patients from the EM Manager case record module.

2. Using standard search procedures, select the EM Manager case record system or EM 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 Patient Change screen appears, showing both old and new patient data for verification.

New Case Change

New Case

Case ID:

Case Name:

Case Description:

New Notes

Case ID:

Case Name:

Case Description:

☒ New Case

☐ New Notes

- 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.
 - **Records are the SAME** - The old and new patient's changes and prescriptions are combined.
 - **Records are DIFFERENT** - Only the new patient's changes and prescriptions are used.
- b. Click **Change Patient**.

See **Case ID**, **Case Name** in step 10.

Case Record Audit Trail

The **Manage Case Records Results** screen gives you two audit trail options:

- **Full Audit Trail**

Managing Case Records

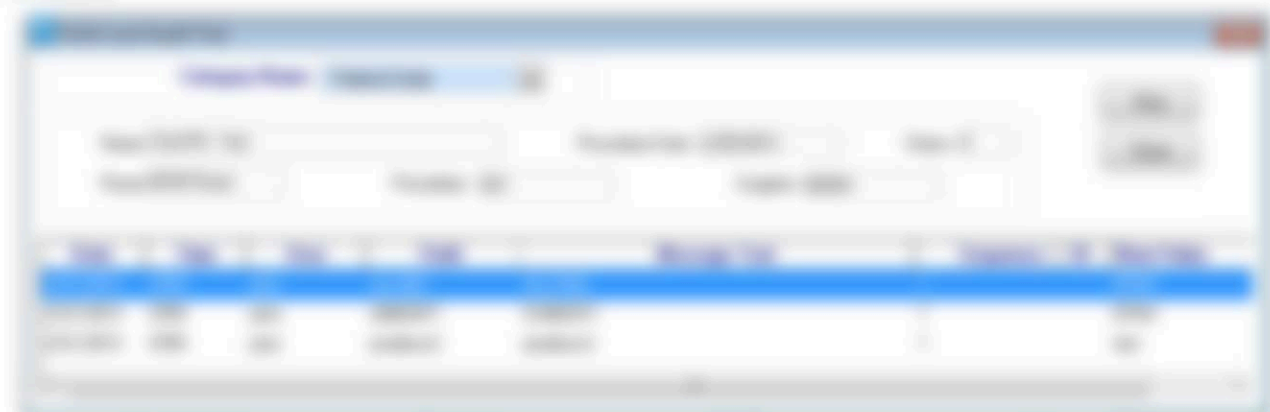
Case Record Audit Trail

- Case Record Audit Trail

Field-Level Audit Trail

The Field-Level Audit Trail window, accessible from the **Field-Level Audit Trail** button in the Storage Case Records Records window, lists changes to any data field in the case record database when the record was created.

This log includes the original value, new values, who made the changes, and when the changes were made. The Field-Level Audit Trail records changes in the value of the field that appears off column to a record.



In addition, right-clicking on a field in a record in the Field-Level Audit Trail window brings up a menu:

- Filter Field...** – to use only entries containing the value data in the field you clicked on.
- Filtering Table Field** – sets all of them and displays audit trail for all fields in the case record.

Filtering is performed in **Category Name** options in both categories to allow the list of changes that are displayed. When the Field-Level Audit Trail window is opened for one field by right-clicking on the audit trail associated with the field, you cannot make a selection in **Category Name**.

You can open the Field-Level Audit Trail by clicking **Print**.

Note: You can also display this window through the Field-Level Audit Trail button in the Case Records window, or by clicking once on the audit trail associated with the case record field.

A **comment** entry in the changes shown by the Case Records Field-Level Audit Trail. Special characters that are used to define the comment format of a case record 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.

- 1
- 2
- 3
- 4

When these operations are used, if a user-defined field's records format is defined in the system, they do not display in the Case Record Audit Trail. For example, if a user-defined field is formatted with a format such as a sequence, the data appears in the trail as "00100" but appears in the Case Record Audit Trail as "00100".

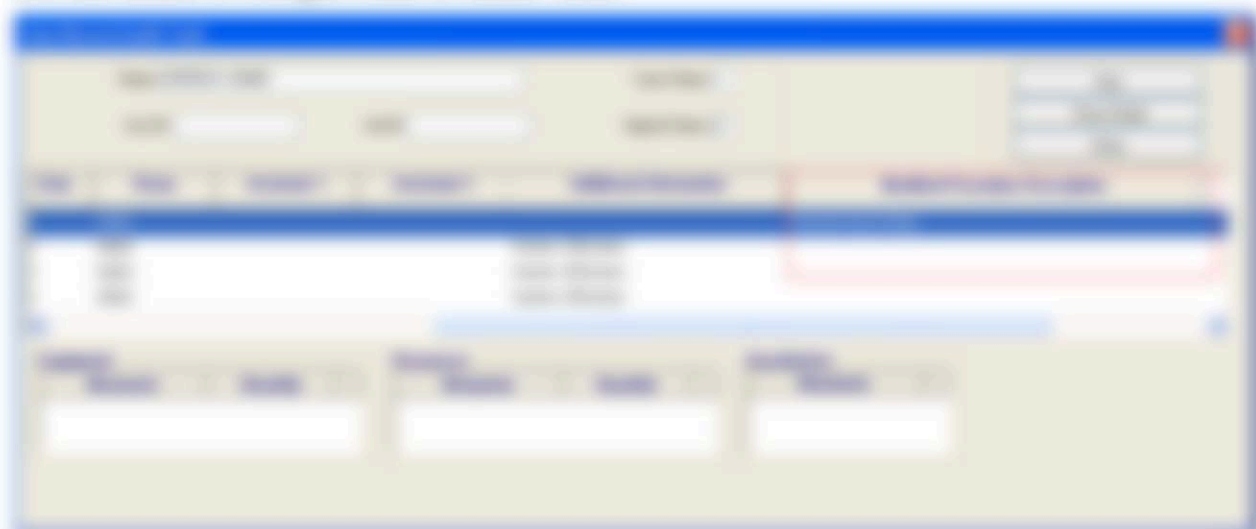
Changes to system data made by a scheduled job appear in the Case Record Audit Trail with an attribute to the schedule.

If a system has an alias and another field is alias member selected, they are sorted in the system. The sorting is reflected in the Case Record Audit Trail as a change by the JCL Manager application. (0010, 0000)

Header/Member Audit Trail

The Header/Member Audit Trail window, accessible from the **File Audit Trail** window in the Storage Case Records Records window, shows any activity in the header or any member of the case record. This includes creating, editing, deleting, moving, and renaming.

In addition, when you highlight a header member, you can click **Show Detail** to expand the window and view details of changes made to header fields.



Click **Show Detail** to collapse the window to the original state.

Wrapping Case Records

Case Record Book Table

Weather History: Precipitation Description Building

When you scroll to the right-hand side of the grid that displays weather information in weather and forecast, the Weather: Precipitation Description column becomes visible.

The **Weather: Precipitation Description** column displays the precipitation type if changes have been made to the precipitation description. To add a modified precipitation description, you select the cell that contains the change and click **Wrap Text**. The window appears in three steps, and you click the **OK** button at the right-hand end of the **Weather: Precipitation Description** to display the description.

The description appears in the **Weather: Precipitation Description: Wrap Text** window. Clicking **OK** in the **Weather: Precipitation Description: Wrap Text** window causes the **OK** button and the **OK** text to appear in the modified description, as described in *Creating, Editing, and Deleting Weather: Precipitation Descriptions* (page 200).

Weather Summary: Precipitation Description Building

Precipitation information for weather and **Precipitation** in the weather window appears by clicking **Wrap Text**. A change description for a description, **Precipitation**, is indicated by an **OK** button at the right-hand end of the **Precipitation: Summary** column. To complete a description, if the right end of the description is too long for the information, an **OK** button also can appear. Clicking the **OK** button displays the precipitation description in the weather window, as shown in the following graphic. Clicking **OK** in the **Weather: Precipitation Description: Wrap Text** window again enables you to click the **OK** button and the **OK** text to appear in the modified description, as described in *Creating, Editing, and Deleting Weather: Precipitation Descriptions* (page 200).

Creating, Editing, and Deleting Weather: Precipitation Descriptions

Click **OK** in the **Weather: Precipitation Description: Wrap Text** window to display modified precipitation descriptions, as described in the preceding sections. Click **OK** in the window that displays the **Change Case Records** window shown in the following graphic. The **Change Case Records** window shows **OK** and **OK** text, as shown in the modified description, by selecting options at the top of the window.

How the Case All Weather History

Click **Case All Weather History** and the following table displays in the grid that

- **Weather: History** (OK)
- **Case: All Weather History**
- **Weather: All**
- **Weather: All**
- **History**
- **History**
- **History**

Note: The first listing of all the sections created with using **Flow 40** have the same description as the **Flow 40** key in the audit trail. Additionally, if a user who has access to cases is not of 1 section, the **Flow 40** action appears in the audit trail if a user selects it, along with the 1 record section.

New Record Summary

When a user views the **OracleEPM360 Manage Record Summary** page within a case record in **CRM Storage**, the **Summary** appears in the audit trail as **1-10-1-1-1-1**.

Case Record Upload Audit Trail

When a case record is automatically uploaded, an entry appears in the audit trail indicating the upload is pending. The entry consists of the path **CRM 40-1000** followed by a file name indicator **CRM 40-100-100-1-1-1-1**.

See the **CRM Storage Configuration Guide: Case Record Defaults**.

Manage Case Record Defaults Overview

Managing case record defaults involves working in two windows:

- A storage window, where you select record values.
- A storage options window, where you select case record defaults from the list returned by the search.

Storage Processing Flow

1. Select record values, such as case record defaults, suggested procedures, etc., in the **Case Record Default** window.
2. Click the **Save/Submit** button to update the case record defaults meeting your criteria. The **Case Record Defaults Options** window appears with a list of defaults meeting your criteria.
3. Click **Options** to change the configuration of the storage.
4. Select the case record defaults you want to work with from the **Case Record Defaults Options** window.
5. Click the corresponding button at the bottom of the window to add defaults, edit or replace multiple defaults, view defaults, etc.

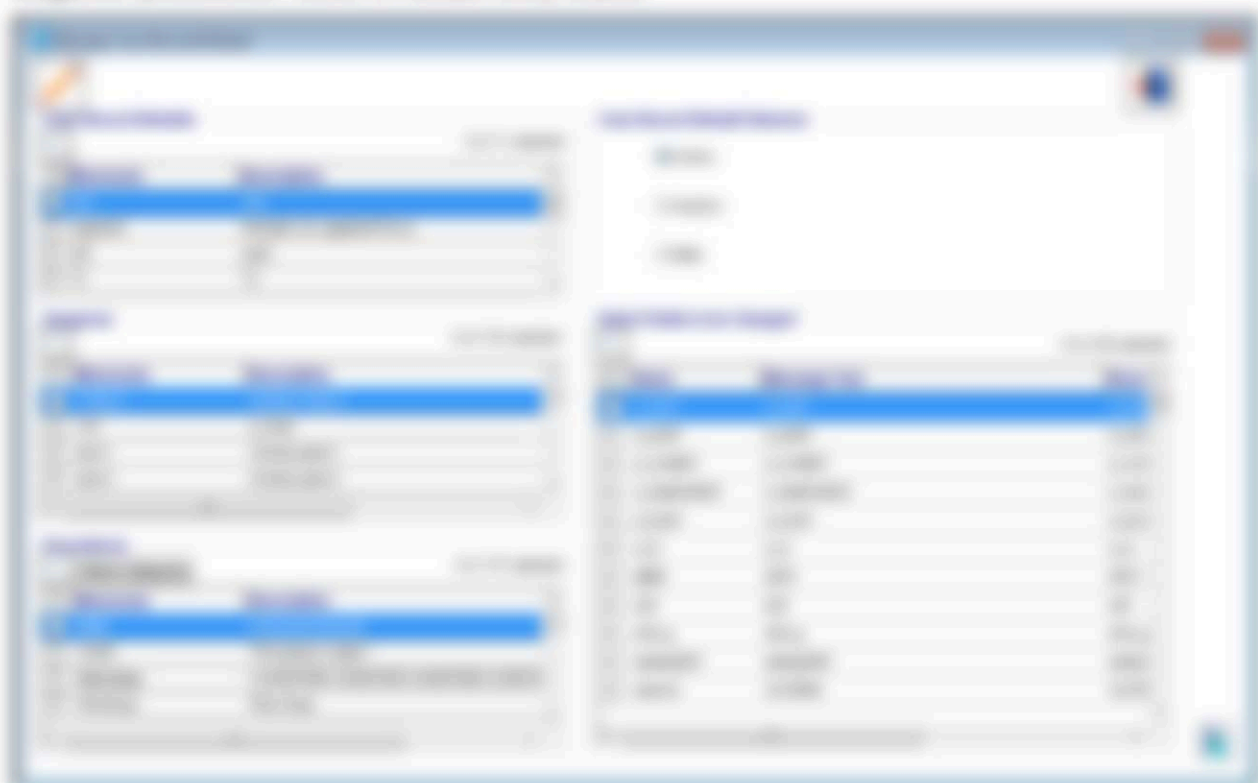
Managing Case Records

Manage Case Record Defaults Screen

Manage Case Record Defaults Screen

Menu Profile > Manage Case Record Defaults

The Manage Case Record Defaults screen is used to create case record defaults by default case category, procedure type, or default entry value.



Storage Screens

You can select case record defaults using any combination of the following types of criteria:

- **Case Record Default** Select case record defaults directly.
- **Regimen** Look up regimen specific case record defaults.
- **Procedure** Look up case record defaults by procedure. There is also a button to look them up by procedure category. See [Case Categories](#) on page 10.
- **None** Select nothing or both.

- **Select Fields to be Changed:** Find case record details with entries in these particular fields.

Important Note on Select Fields to be Changed

The Select Fields to be Changed screen has two sections:

- Like the other screens, **Suggests Procedures** also acts as a filter to find related records.
- This screen also provides the list of fields whose data is to be modified or deleted in the records. You select the search criteria in other words. If you select criteria that are already set within the Select Fields to be Changed screen, you can edit details using **Modify/Remove Fields** in the Manage Case Record Details screen under the **Fields** tab to be listed for modification. However, if you click **Clear Fields** in fields are presented for clearing, not again. This can be added in the Case Fields screen.

See Manage Case Record Details, **Modify/Remove Fields** Screen.

See Manage Case Record Details, **Case Fields** Screen.

Manage Screen Buttons

There are a number of buttons for each set of criteria. Click the screen tab to select or clear all criteria.

Action	Criteria	Description
Find	All	Find search criteria for finding records. See Find Buttons screen.
Find	Procedure	Find procedures by Procedure Category.
Category		See Procedure Categories in the Find screen.

Find Buttons

Each of the criteria screen has a **Find** button that you can use to search for suggested procedures, etc.

To use, click **Find** under **Description** or **Keywords** under the criterion you want to search for. See **Find** screen.

The first criterion that matches the search criterion entry is highlighted. You can then select the entry under each **Find** again so that the next entry that matched the criterion you entered.

Managing Case Records

Manage Case Record Defaults Options Screen

Select Categories

Select Categories allows you to select Procedures within Procedure Categories.

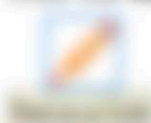
After you click **Select Categories**, a list of the Procedure Categories opens.

Select the Procedure Categories that contain the procedures you want to use by clicking the cell under the **Select** column.

The Procedure Categories selection screen opens, and the Manage Case Record Defaults screen opens. All of the procedures in the Procedure Categories you selected 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 provided.
2. Click the **Retrieve/Refill** button.



The Case Record Default Options screen appears with the list of case record defaults that meet your search criteria.

See [Storage Defaults](#) on page 125.

See [Manage Case Record Defaults Options Screen](#) on page 126.

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

Storage Case Record Defaults: Add/Replace Data Screen

Case Record Default Actions

Action	Description
 Edit Default	Update the Case Record Default information in the entry for the highlighted user. For more information on the underlying logic, see the following chapter in the OIT Storage Configuration Guide: Case Record Defaults.
 Delete Default	Deletes all highlighted or selected case record defaults in this screen. This action should be limited to selected users through security.
 Add/Replace Data	Use to add new defaults to selected records and to modify data in the list of fields selected in the Filter Fields in the Change screen of the Storage Case Record Default Options screen. See Storage Case Record Defaults: Add/Replace Data Screen entry.
 Clear Data	Use to clear data from the list of fields selected in the Filter Fields in the Change screen of the Storage Case Record Default Options screen and to add new fields in the list of the record. See Storage Case Record Defaults: Case Data Screen in page 125.
 Print	Prints the Storage Case Record Default screen.

Storage Case Record Defaults: Add/Replace Data Screen

You can update the Case Record Default: Add/Replace Data screen by clicking **Add/Replace Data** in the Storage Case Record Default Options screen. The screen opens with a list of the fields that are selected in the Filter Fields in the Change screen. Important user status in this screen are discussed in the following sections:

- User Default Fields
- Record Default Fields
- Provider Default Fields

Managing Case Records

Manage Case Records (includes: Add/Remove Case Record)

Button Table

This table explains the buttons in this window.

Button	Description
Add	Click to add a new field to the list. New Case Record Fields (opens)
Modify	Click to edit the highlighted field. New Fields (opens) Fields in the listing (opens)
Remove	Click to remove the highlighted field from the list.
Process	Click to apply the changes you have made to the selected records. New Records (opens) Fields in the listing (opens)
Close	Click to close the window and return to the Case Record Default Options window.

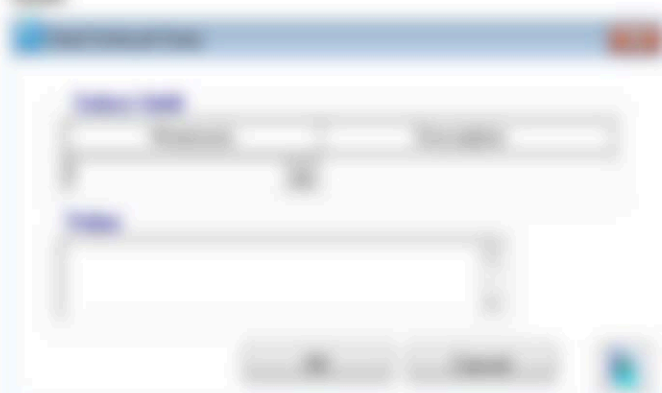
Get Record Fields

1. Click **Add** on the Manage Case Records window.

The window appears to enable you to add fields to the list and to **OK** is the default state of the window.

2. For **Remove**, select a field.

The field name and description appear, and the table has changed to accommodate the field list.



Note: The list of fields you can select from includes only the user-defined fields, which are available in the Case Record Fields.

3. Click the default to **Remove** and click **OK**.

Managing Case Records

Manage Case Record Defaults: Clear Data Screen

The **Clear Data** screen displays information about the data you selected to be displayed in the Storage screen of the **Manage Case Record Defaults** screen.

Modify Default Fields

1. Click **Modify** in the **Manage Case Record Defaults** screen.
This screen enables you to modify the default data in the field.
2. Enter the default for **Value** field and click **OK**.
The **Modify Default Fields** screen closes, and the data you entered is displayed in the Storage screen of the **Manage Case Record Defaults** screen.

Process Default Fields

When all of the fields you want to be added, changed, etc., are done, it is time to apply the changes to the fields in the selected default records.

1. Click **Process Default Fields Changes** to have the system apply values each change and ask you if you want to apply each change to the particular default record.
2. Click **Process** to apply the changes to the selected default records.

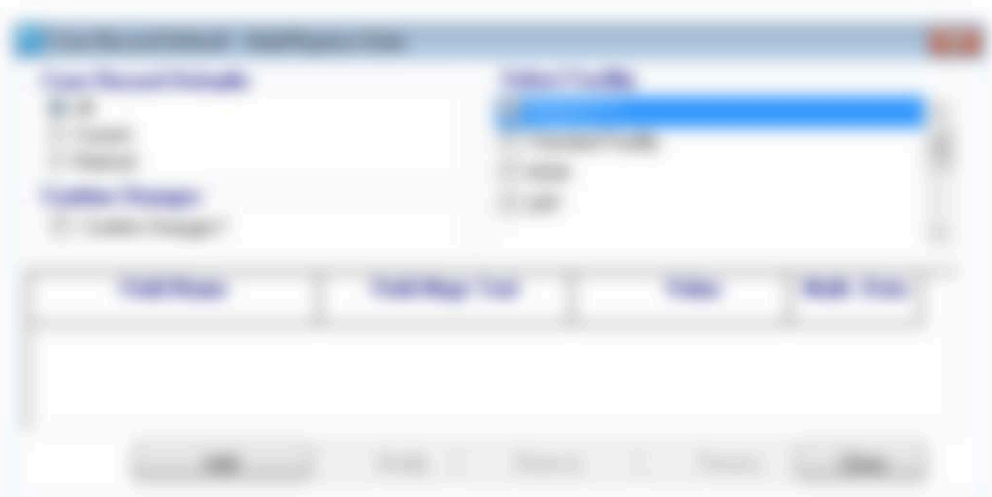
Note: Any changes applied to fields that are not in a particular default record will be lost. For example, if you have two records, and a particular default field is in the first three of the records but not the other two, only the first three records are affected. If all records have the field in addition to the other two records, it will not have a default value for those records.

Manage Case Record Defaults: Clear Data Screen

The **Clear Data** screen displays the **Manage Case Record Defaults: Clear Data** screen by clicking **Clear Data** in the **Manage Case Record Defaults: Options** screen. The screen opens with a list of the fields that you selected in the **Value** field in the **Changed** screen.

Managing Case Records

Manage Case Records (Default) Case Data Screen



This is a list of fields from which you select the data to be stored in the selected default records.

Button Table

This table explains the buttons in this screen.

Button	Description
Add	This is to add a new field to the list of fields to store. The field is added to the selected record.
Remove	This is to remove the highlighted field from the list.
Assign	This is to apply the changes you have made to the selected records. This enables the same way as the Assign button in the Highlighted Fields screen.
Cancel	This is to cancel the changes made to the selected record.
OK	This is to close the window and return to the Case Record Details (Default) Options screen.

How to Proceed to the Screen

1. Click **Add** on the **Case Data** screen.
This screen appears to enable you to add fields to the list to be stored.
2. In the **Highlighted Fields** screen, 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 Fields**.

3. Click **OK**.

The Case Record Case record 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 all records from your HR Management database.



Purge Types

There are three main types of purge that can be performed individually or simultaneously:

1. **Booking Purge:** Purge bookings related to the case selected in the Booking Type drop-down menu. You can also use the list controls next to bookings to further refine your bookings purge.
 - **Include Bookings used to create a Case:** Purge bookings related to case records.

Managing Case Records

Page Bookings and Case Records

1. **Enhanced Records for Enhanced Booking** Page appears from the CRM Manager bookings window. If the system records are other than Bookings, also add them to bookings associated with them.
 2. **Full Case Record Page** Page of case records created within the Full Case Records Case Page, also along with their associated data, including instances.
 - **Enhanced Records for Enhanced Cases** Page appears from the CRM Manager case record window. If the system records are other than Full Case Records Case Page, also add them to case record.
 3. **Partial Case Record Page** The purpose of this option is to aggregate selected fields from target case to customer and reporting customers. This option page of case record data for cases created within the **Partial Case Records Case Page**, also, except for the following two:
 - Data in fields mapped to the Case Record Field Mapping window.
 - Data in Case Record user-defined fields placed in the right box at the bottom of the window. Such fields should decide what user-defined fields should be in the page.
- In the secondary window, data in the **customer** and **any user-defined fields** are presented, as well as the data in the fields mapped to the Case Record Field Mapping window.
4. **Enhanced Records for Enhanced Cases** Page appears from the CRM Manager case record window. If the system records are other than Full Case Records Case Page, also add them to case record.

See the CRM Manager Configuration Guide: Case Record Administration.

Page Records

1. **Enter Fields in Page**

The Page window appears. Note that only the Fields tab shows and the other Page tab is active.
2. **Enter a Field** to page records from. Note that you can only page one field at a time.
3. **Enter one or more Pages**

The Page table and the options associated with each page are selected become active.
4. **Enter Booking Bookings** under **Booking Full Case Record** if you want to page these records in an active active page.
5. Enter the **Page table** to the page you selected.
6. Enter the other options, if any, associated with each page you are gathering.
7. If you are doing a partial case record page and want to include some user-defined fields, select the fields in the left box at the bottom of the window and double-click or tap. After move them into the right box.

Note: The user can use **Ctrl + Enter** to add a page of fields at a time. **Ctrl + Enter** is added multiple individual fields at the same time. Note that **Ctrl + Alt** is available from in the right box.

8. After you have selected and double-checked all of your page information, click **Page**.

- A warning message appears.
- If you want to continue, click **Yes**.
- A progress window opens, followed by a window indicating that the purge is complete and summarizing what was done.
- Click **OK** to acknowledge completion of the purge.

Purge Audit Trail

Click **View Audit Trail** in the **Purge** window to open the audit trail for tracking and case records purge.

PickSets and Worksheets

Overview

Picksets and worksheets are special kinds of printed reports that you use to obtain the supplies necessary to perform operations and to set up the CR for the operations.

Topics discussed in this chapter include the following:

- Picksets Overview
- Picksets as Data Lists
- Consolidation Picksets
- Pickset Printing Details
- Custom Picksets
- Worksheets

Picksets Overview

Picksets are lists of the supplies items needed for operations that have been selected for set up performed. Supplies and materials for picksets are taken from the picklist items associated with

Positions and Workbooks

Position Overview

positions at the time that the position was printed. Positions are then used to get supplies from the various workbooks and deliver them to the operating system when they are needed.

Positions are designed to allow the efficient printing of supplies. However, systems need to also send data to positions. For example, when using weight calculations, which gives you the flexibility to use positions to supply the exact data and printing supplies.

Note: This overview of positions are visual representations of the position and may, at times, not add exactly to the printed page. Always refer to the printed copy of the position for an accurate list.

Types of Positions

There are three types of positions, determined by how supplies are arranged in the list:

- **Class Class:** Items are grouped by presentation and operation.
- **Compressed:** Items for all presentations needed for a given time period are grouped by type in the print.
- **Custom:** For non-printed, but lists of items in Publications only.

User Defined Positions and Workbooks

User-defined storage system is designed with a standard set of jobs, lists and workbooks. In addition, administrators can use the Custom Report feature to create custom positions and workbooks.

Key Feature: Customized Positions and Workbooks. If needed, administrators can use a flag to list all account activity. Administrators can use an administrator or master number, then define positions and workbooks, then increased in capacity because the feature provides the efficient data and information needs.

Fixed Positions

Fixed and compressed positions are used to the fixed as well as they are printed. The reason for the contents of a position does not change, even if the contents of the publication and it is used as a change, so that items and quantities that go into the data about the items as they were when the position was printed.

There are two ways to add supply items and quantities:

- You can add items and quantities to a particular operation before the position is printed by altering the loading and printing **Key Page Position** in the Storage Working System, which using the system affects only the position for a particular operation. The underlying publication will not change.

- After the problem is solved and the case moved to **Solved**, you can change supply terms and quantities in the Description History window. Again, changes made in Description History do not impact performance costs.

See [Costs by Case Cost](#) on page 100.

Transmitting Supply Option

The case cost and associated problems, you have the option to transmit Department Requirements to update your inventory number at the same time you print problems.

See the [SAP Storage Configuration Guide: Performance Cost Supporting Structures](#).

Problems by Case Cost

Menu Tools > Manage Bookings

Menu Path: Configuration > Problem

In case cost problems, items are grouped by alternatives and quantities so that they can be placed on a case cost in the order in which they are dropped off at the CTR.

You can print case cost problems two ways:

- Recommended: Through the Print Problem screen from the Print Configuration menu.
- Through Manage Bookings.

How to Case Cost Problem Through Print Configuration Menu

Note: This table shows how to print problems if they do not have cost terms and have performance costs associated with them. If you associate costs in addition to those shown in this table, see [Costs: Printing Details](#) on page 101. For a complete explanation.

1. Select **Print Configuration > Print Cost**.
2. The Print Problem screen opens.



The authors have no direct or indirect financial interest in any of the products or services mentioned in this article. The authors have no financial interest in any of the products or services mentioned in this article.

10. To print the contents, click **Print**.

NOTE: The data shown here is for general information only. It is not intended to be used for any specific purpose. The data is for general information only. It is not intended to be used for any specific purpose. The data is for general information only. It is not intended to be used for any specific purpose.

1. **What is the purpose of the study?**
2. **What are the research objectives?**
3. **What are the research questions?**
4. **What are the hypotheses?**

Printable and Worksheet

Printable by: User: User

4. User Mapping

- 4.1 system opens to enable you to select printing options.
- 4.2 Select the options you want to print profiles for from the following:
 - 4.2.1 **Formset** Only the highlighted option.
 - 4.2.2 **Method** All of the records with a check mark in the left column of the Options window.
 - 4.2.3 **All** All of the records in the Options window.



- 4.3 **Approved** Select **Print All** and **Print**.
 - 4.4 **Print All** **Approved** **Printable** is print those profiles that have been printed previously.
 - 4.5 **Approved** Select the **Method** you want to print profiles for by checking the check mark in the left of each **Method** or by clicking **All Register** or **All Pharmacy**.
- If you do not select **Method**, a warning for all **Method** and **Method** will be printed. Profiles printed this way will include **TopPharmacy**.
- TopPharmacy** will not print in the profile if you select **Method**. This is because by selecting one of **Method** **Method**, you are excluding all others. Because there is no **Method** for **TopPharmacy**, **TopPharmacy** are also excluded.

Problems worksheets are located in a dashboard in the top to the right of the meeting. To select a problems worksheet, click the top to the left of the meeting worksheet.

1. Click **OK**.

The new problem worksheet appears.

Note: The problem uses the default user defined problem format. If there is no default format for the type of problem, it changes with the standard format.

2. Adjust the view so that content appears the edges of problem.

3. To print the problem, click **Print**.

See Storage System Overview on page 25.

See System Printing Overview on page 25.

Consolidated Problems

How Print Consolidation = Problem

Consolidated problem contains all items for all operations in the data range. This is useful if multiple are located in multiple worksheets. If you are gathering all the materials for multiple users and the meeting, including:

If you want the worksheet for a meeting operation and if for an alternate operation, the consolidated all contains them and how it works.

Other problem is user will. Consolidated problem can only be printed from **Print Consolidation = Problem**.

If you print the Problem through **Print Consolidation = Problem** and select a Print Group, you are printing the Problem to the settings of the specific group in the Print Group.

If you print Problem through **Tools = Storage Problem = Tools = Print Problem** and select a Print Group, you are printing the Problem to the Problem Tools that have been associated with the Print Group.

How a Consolidated Problem

Note: This procedure shows how to print problem. If they are not from and have additional work associated with them. If you encounter additional errors, see **System Printing Overview** on page 25. For a complete explanation.

When a user problem print as a report, the user is that to print items that are not in print group followed by items used to print groups that include them.

1. Select **Print Consolidating + Problem**

The Print Problem window opens.

2. Select **Consolidating**

In **Print Range** and **To Range**, enter or select the range of operations data to which to print the results.

Consolidate From Only Integrated Problem is used when problems that have been printed already.

Consolidate to Range R_{10} and To R_{10} enter the range of the locations to which will be consolidated. These are the last two fields.

Select the worksheets you want to print problems for by selecting the sheet names to the left of each worksheet or clicking **All Regular Worksheets** or **All Planning Worksheets**.

Note: Planning worksheets are identified by a sheet name to the left of the right of the worksheet. To select a planning worksheet, select the box to the left of the worksheet worksheet.

Select the **Facilities** and **All Resources** to which you want to print problems. If you select a Facility that includes First Group, the option to select a First Group appears. If you select a First Group, you cannot select specific units.

Note: If you do not make any selections for worksheets or All Resources, a problem for all worksheets and units will be printed.

3. Click **Print**

Printer processing begins. The Consolidation Practice appears.



Figure 1: New Supply Forecasting Report

Supply Forecasting

New Supply Forecasting Report - Supply Forecasting

The New Supply Forecasting Report window lets you specify a consolidated report designed to help in supply forecasting. It is designed as a consolidated report window that is continuous, all items for all operations in the sales range. The report data can include items in the Forecasting Summary.

The window that you can specify in the window is other Consolidated Forecast Forecasting, and it includes the columns that do not appear in other windows to help in supply forecasting.

- Forecast
- Forecast Date
- Forecast Value
- Forecast Summary

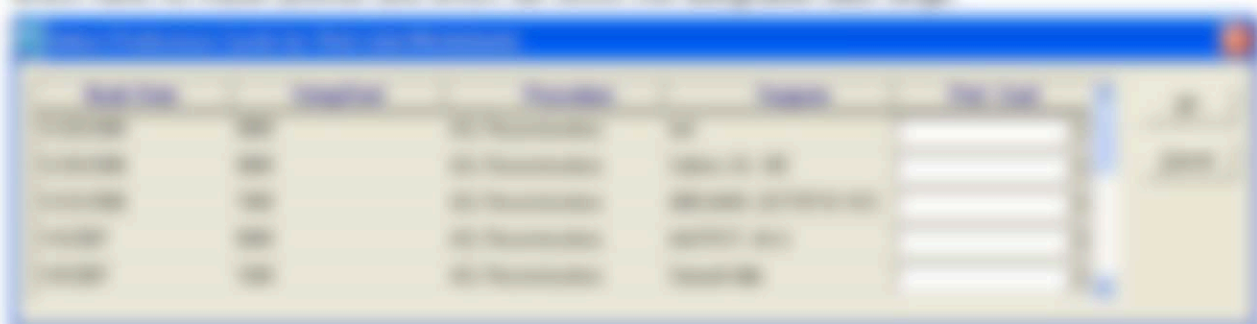
1. Display the window for specifying the report by clicking **Print Configuration > Supply Forecasting**.
2. **Forecast the Demand from the Day to Release**. The first quantity is automatically selected from the day to first release value. Selecting this option removes the first quantity from the **Release** column value in addition to the day to first release value.
3. **Forecast from the Release value that is fixed to**. The value can be negative and can have up to four digits. If you enter a value here, some other number besides the value will not appear.
4. In **From Day** and **To Day**, enter a value for range of operation dates for which to print the report.
5. **Forecast in From Day** and **To Day**, enter the range of the months to report with inventory. These are the last fields.
6. Select the inventory you want to print graphs for by checking the check boxes to the left of each inventory or clicking **All Regular Inv.** or **All Pharmacy Inv.**

Note: Pharmacy inventories are displayed in check box to the left of the right of the inventory. To select a pharmacy inventory, check the box to the left of the inventory inventory.

7. Select the **Regulation** and **All Phases** for which you want to print graphs. If you select a **Regulation** the number that change the option is added in **Print Group** column. If you select a **Print Group**, you cannot select specific items.

Note: If you do not make any selection for inventories or All Phases, a graph for all inventories and months will be printed.

8. Clicking **Release** button is used for graphs you to generate information with a procedure when how to make graphs and when all within the designated date range.



9. Clicking **OK** displays the consolidated graph for supply forecasting.

Printer Printing Details

This topic discusses additional options for printing printers by user role as well as associated printers.

Prerequisites

This topic assumes that you have already used the Storage Settings screen in the Print Printer screen from the Inventory menu to select the type of printers and bookings you are printing printers by.

See [Printers by User Role](#) on page 122.

See [Associated Printers](#) on page 122.

Overview

- If your system is set up to request supplies to inventory when printers are printed, and printer processing is implemented, you are asked to specify additional costs for supplies that do not already have associated costs. The HP Storage Associates for use and storage that is a print order.
- If your system is set up to request supplies to inventory when printers are printed, you will see some printers in addition to the ones described above.
- These printers are whether you want to request supplies at that time or, if you have already printed the same printers and requested supplies, if you want to request again.
- Printer requirements are not included in printed printers.

Print Printer

1. Click  in the Printer screen, displayed by the Printer button in the Storage Settings screen or [Printer](#) (Print Printer) screen.
2. It appears that the procedures you don't want to print printers by, then click . The screen is that all procedures are selected. The printer printers to complete bookings and events in the user from. The bookings may present another option.
If you do not print from user from, after manually or through printer printing, you will be shown a message indicating that records cannot be retrieved.

Profiles and Preferences

Contents: Profiles

If you click **Yes**, the profiles are treated as updates. That is, they are based on the current 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 you click **No**, if the associated updates combination has no preference cards, a window opens allowing you to select them.

5. Select a preference card to go with each procedure and click **OK**.

If your **Off-Storage** window is set up to request inventory information to your **WFO** inventory management system when profiles are printed, and the contents of one or more of the profiles have already been requested, a window gives you the following options concerning requesting settings:

- **All**
- **New Preferences**
- **None**

6. The screen indicates that the contents of some profiles have been requested previously.
 - Click **All** to request all of profile items including those that have already been requested.

Note: The system means that some inventory items will be requested twice.

- Click **New Preferences** to request only those profile items that haven't been requested yet.
- Click **None** to request any inventory updates for these profiles.

A series of notes lists and manages updates with **Off-Storage** computer user profiles. Then the profile appears in the screen.

Note: A system password control window is not user information is included in profiles. Contact the Print Order Center for information.

Contents: Profiles

Menu: Tools > Manage Preference Cards

Contents lists also allowed to go **Contents: Profiles**, are profiles printed from the **Preference Card** window. The tool can then is just supplies the address codes, but they do not contain address information. They are also used to print the representative products. Contents lists are grouped by their associated preference cards and are used for managing building, listing, adding the items in preference cards.

Although you may add custom problems to your supplies, you do not have the option of being notified immediately when printing them as you do with other kinds of problems.

If you add Problems through Tools > **Manage Problemsets** Tools > **Print Problems** and select a **Print Group**, you are printing the Problems for the Problemset Tools that have already associated with the Print Group. If you add the Problems through **File Configuration** > **Problems** and select a **Print Group**, you are printing the Problems for the settings of the specific section in the Print Group.

How to Configure

1. Select Tools > **Manage Problemsets** Tools
The Manage Problemsets Tools screen opens.
2. Select the combination of problemsets, subjects, assignments, etc. for which you want to print tests.
3. Click the **Reconfigure** button.



4. Select one or more problemsets and click **Print Problems**.
A window opens you to specify which you want to the test.
If you select multiple facilities, you are prompted to choose a facility to print the problem for.
5. If you select multiple facilities, select a facility. If the facility has print groups, the option to select a print group appears, but you are not required to select one. Click **Print**.
The Problem Content screen opens.
The printer uses the default user defined printer format. If there is no default format for the type of printer, all Manager uses the standard format.

Note: If you print the problem and you print the worksheet, the worksheet supplies are printed after that the supplies that appear in the problemset card.

See the All Manager Configuration Tools Manage Problemsets Tools.

Workbooks

Menu: Tools > Manage Bookings

Menu: Print > Worksheets > Worksheets

You typically use worksheets to prepare a room for a supplier in the online booking. Worksheets are different from positions in that they are not specific, and they let the user to position in the room and to arrange property within the room.

Also, worksheets contain room codes, which are the room codes after user is in the supplier's personal preferences. In each position, the name and position of worksheets are also from different code.

The user enters the spending room and normally enter supplier and the user is transfer with the location of each room. Worksheets can be used instead of position for entering supplier for each room. Positions must still be entered in order to place supplier in the room.

Worksheet Sort Order

Worksheets can be by an online booking number, the room supplier sequence, each position, sequence preference and room number, sorting fields are number with each position. (The sort is highly different if you are including location location in the sort.)

Custom worksheets have multiple sort options. When custom worksheets sort as a table, the user is that is sort room that are not a sort group followed by room is sort group based by the sort group that include them.

Note: Worksheets are designed to represent a "page" of a single preference code. For the user, items defined as integrable space in worksheets is not a preference with the integrable value of items is greater in worksheets.

Worksheet Example

Worksheet for Building

Customer: Year: Unit: Item:

Item Name	Unit Price	Quantity	Total Price
Item 1	100.00	1	100.00
Item 2	200.00	2	400.00
Item 3	300.00	3	900.00
Item 4	400.00	4	1600.00
Item 5	500.00	5	2500.00
Item 6	600.00	6	3600.00
Item 7	700.00	7	4900.00
Item 8	800.00	8	6400.00
Item 9	900.00	9	8100.00
Item 10	1000.00	10	10000.00

Notes:

1. The unit price is the price of the item per unit.

2. The quantity is the number of units of the item.

3. The total price is the sum of the unit price and the quantity.

Item Name

Unit Price

Quantity

Total Price

Item 1

Unit Price

Quantity

Total Price

Item 2

Unit Price

Quantity

Total Price

Item 3

Unit Price

Quantity

Total Price

Item 4

Unit Price

Quantity

Total Price

Item 5

Unit Price

Quantity

Total Price

Item 6

Unit Price

Quantity

Total Price

Item 7

Unit Price

Quantity

Total Price

Item 8

Unit Price

Quantity

Total Price

Item 9

Unit Price

Quantity

Total Price

Item 10

Unit Price

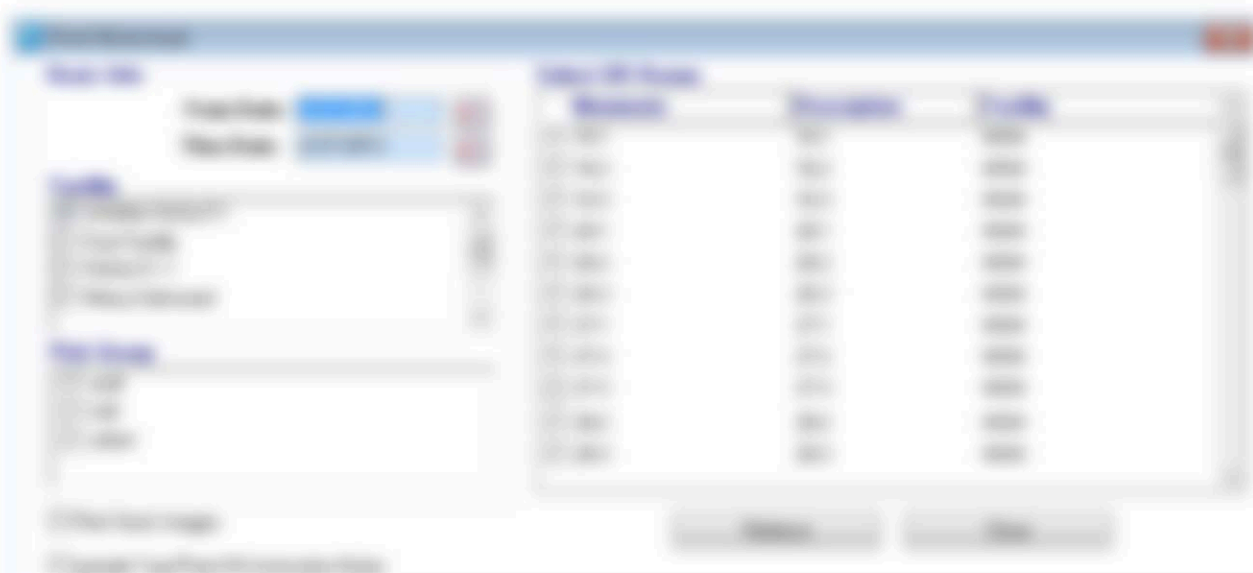
Quantity

Total Price

Notes: This worksheet is a template for building a worksheet. It is not intended to be used as a final worksheet. Please refer to the worksheet of the problem for an example.

How Worksheet

1. Select the worksheet in the worksheet.
2. The worksheet is created.



2. Select a **Table** range and **Table** Name

Select one or more tables. If you select a table that includes a table group, the option to select a table group appears, but you do not have to select a table group. If you select a table group, you cannot select specific table cells.

Select **Table** **Table** range to have table range appear in your worksheet.

3. Click **OK**

The **Table** **Table** range in **Table** **Table** range is included in **Table** **Table** range. The **Table** **Table** range appears with multiple procedures. The procedures that have associated table range information are displayed by default.

Note: Depending on how your system parameters are set up, the **Table** **Table** range may not be available at your site.

Select the procedures you want to appear in the worksheet from the **Procedures** column.

4. Click **OK**

The **Table** **Table** range in **Table** **Table** range appears. The **Table** **Table** range is a list of procedures in **Table** **Table** range. The **Table** **Table** range is displayed with multiple procedures.

Select a procedure and the **Table** **Table** range. Then click **OK**.

Table **Table** range appears in the worksheet. 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, **Table** **Table** range uses the standard format.

Overview

You can use IBM Manager's standard report writing features to generate performance reports. You can generate reports at a wide variety of data and make the reports as specific or as general as you like. Buttons at the top of the window allow you to scroll through the report, and to **Print**, **Save**, **Print as HTML**, and **Close** the report.

This chapter provides detailed instructions for the following IBM Manager standard reports:

- CPU Summary Report
- Summary Report
- Utilization Report
- Basic Time Utilization Report
- Detailed Utilization Report
- Basic Utilization Report
- Detailed Average Load Report
- Performance Load Average Report
- Performance Load Average Basic Report
- CPU Summary History
- Load History Report

It was noted that any of the information given, such as name, sex, the information about national origin, the full name, telephone number, date of birth, date of marriage, and other information, is the full information provided, which means a full range of freedom and privacy, regardless of how it is provided, if there is any. The law is not a law, it is a law, it is a law.

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The 2008 International Budget Report allows you to see a better view of the IMF activities while saving you space. Select categories and items you want included in the report.

1. Select the **Schedules** and **Reservations** you want included in your report. (The default is to select all.)
2. Click **Print**.
 Your data will be included in the report.
3. You can move through the pages of the report by clicking the controls in the upper left-hand corner of the window.

Schedule Reports

Menu Reports > Schedules

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 > Schedules**.
 The Off Meeting Schedule Selection window appears.
2. Highlight the type of report you want to view, then click **OK**.
 The Preparation window opens.

2. Enter a table name and select the **Building Relationships** you want to use.
3. **Advanced Options** with the the **Table Options** in the **Table Options** section. Use it to further refine your report.
4. Under **Table Data** from **Table** select how you want your report sorted.

Example: If you are generating a report including all suggested data relationships to the table, select **By Procedure** in the **Table** and **Procedure** with **Order** is selected in **Table**.

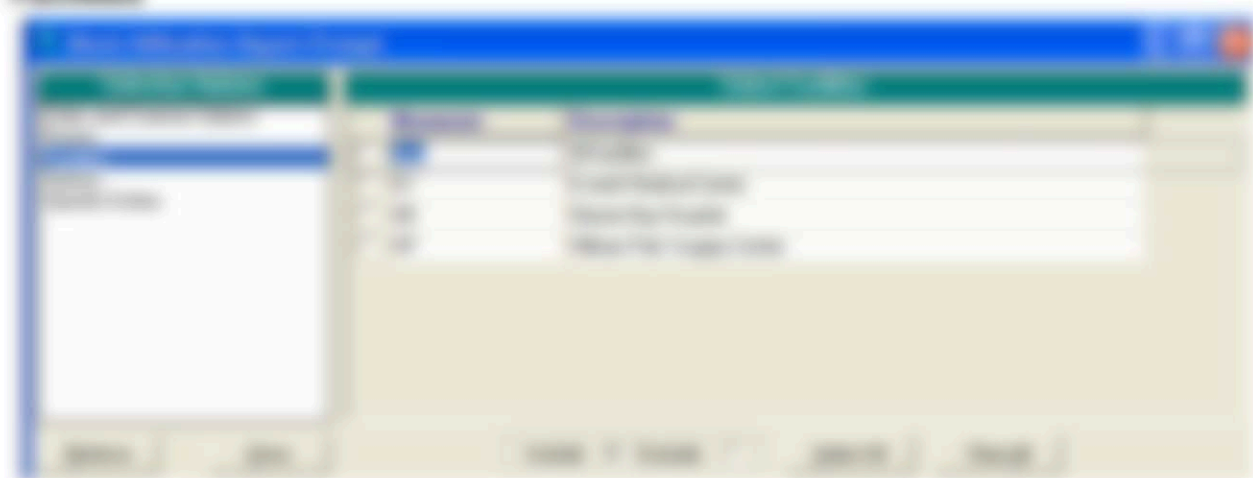
5. After selecting your parameters, click **Preview**.
The following screen appears:

6. If necessary, get your report in the way that you like **OK**.
The report appears.

Reports

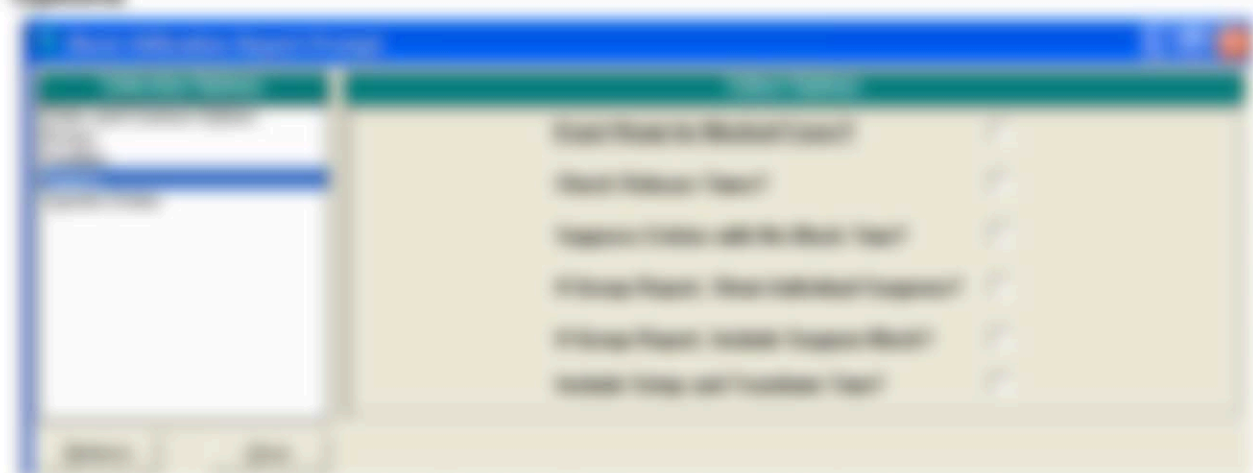
About Time Information Reports

Facilities



Selecting a selection on this page might be useful if you want to generate a report without having to choose all the reports related to that facility on the previous page. Again, nothing prevents you from the report on all facilities.

Options



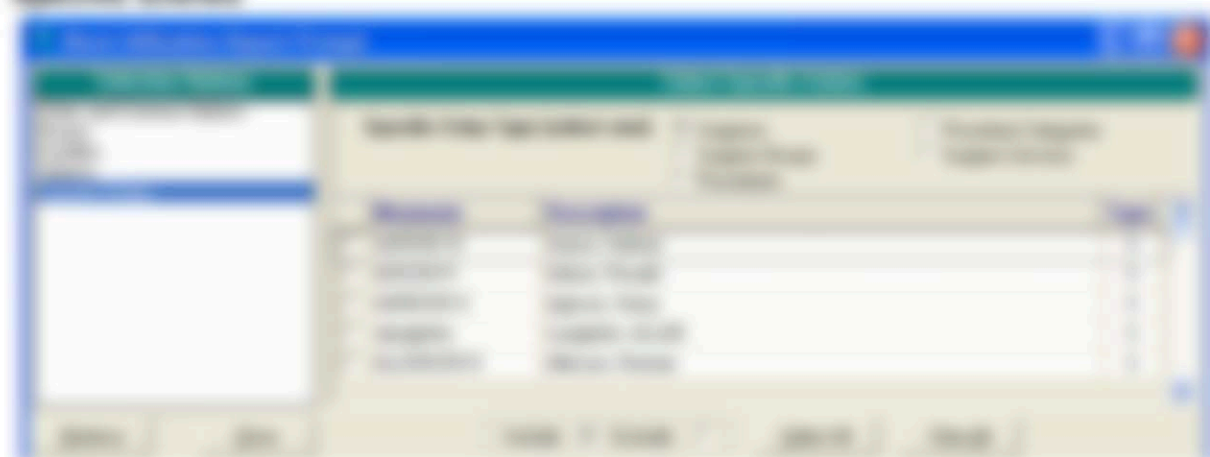
The Options menu item under **AdvancedOptions** contains the following items:

- **Report Name to Report Name**: Select to include only reports performed in a particular report within the same time. Do not select this if you want to include reports that were performed within the same time, but were performed in a different report.
- **Report Name to Report**: Select if you want to include only reports performed within a time that was selected. Do not select this if you want to include reports performed within the same time, but not within a time that was selected.

- **Generate Groups with the Block Time?** Select to add entries with no individual time group entries for **Block as Time** and **Time as Time**. The next option if you want all entries to appear in the report, whether they have individual time data or not.
- **if Group Report, Show Individual Suggestion?** Select if you are generating a Group Report and want individual suggestions, also select all part of the group, if applicable.
- **Include Group and Individual Time?** Select to include group and individual times in the Block Time Utilization Report.
- **if Group Report, include Suggests Block?** Select to check for suggest individual time as well as group time when showing results for groups.

Note: The group gets credit for the suggest's time as well as the group time. However, suggests can be in multiple groups. The same suggest's block time is added to every group the suggest is in in the report.

Specific Entries



In this window the selection options determine what type of report is generated. If all entries are selected there is no need to select any entry, but click **Select All**. All items from the list are included automatically when nothing is selected. This tab option can be selected at a time and the report prints the block time of the entire reporting structure. The only exception to this is selecting Suggests Groups with entry options on the previous options page for "if Group report" selection. There are options near the bottom of the window to include or exclude entries as well.

Report Data

The following graphic is a typical Block Time Utilization Report. This window displays the data in it.

Reports

Block Time Utilization Reports

Available Reports Block Time Utilization Report

Report Name: [Report Name]

Report Type: [Report Type]

Report Period: [Report Period]

Report Date: [Report Date]

Report User: [Report User]

Report Description: [Report Description]

Report Columns: [Report Columns]

Report Rows: [Report Rows]

Report Data: [Report Data]

Report Summary: [Report Summary]

Report Footer: [Report Footer]

The caption in the report's upper left-hand corner shows the type of report that was specified.

The header below the caption displays a description of the parameters selected in Selection Options when report was being created. There are also additional column settings at the end of the report.

Below are explanations of the Block Time Utilization Reports Summary. Figures in blue were added in the example above and from the data range selected in the Block Time Utilization Program window.

- **Days of the Week:** The first number is representative of the right of report day with you have today. Weekdays, Tuesday, etc., occurred within the date range specified. The second number tells you how many Weekdays, Tuesday, etc., occurred from the beginning of the year until the first date of the date range specified.
- **Total Cases:** The total cases performed by the surgeon.
- **Total Time:** The total number of hours and minutes the surgeon spent performing cases.
- **Block Time:** Total available block time or hours reserved for the specific surgeon.
- **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:** 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)
- **Use/Block used:** The total time the suggest spent outside the defined block (Time Time minus Block used)
- **% of unblock used:** Percentage of a suggest's time spent outside the block

How to Use

The **How to Use** information of the Block Time Utilization Report shows the same information as the **Block to Date** information. The **How to Use** is then divided "1" with the percent shown with in the data range (Block to Date).

You have the option of changing the **How to Use** as it exists on the first day of your fiscal year. Contact the First Coast Center to make this change.

Report Tools

Report: Tools shown at the bottom of reports are for all suggests, even if they are not included in the report.

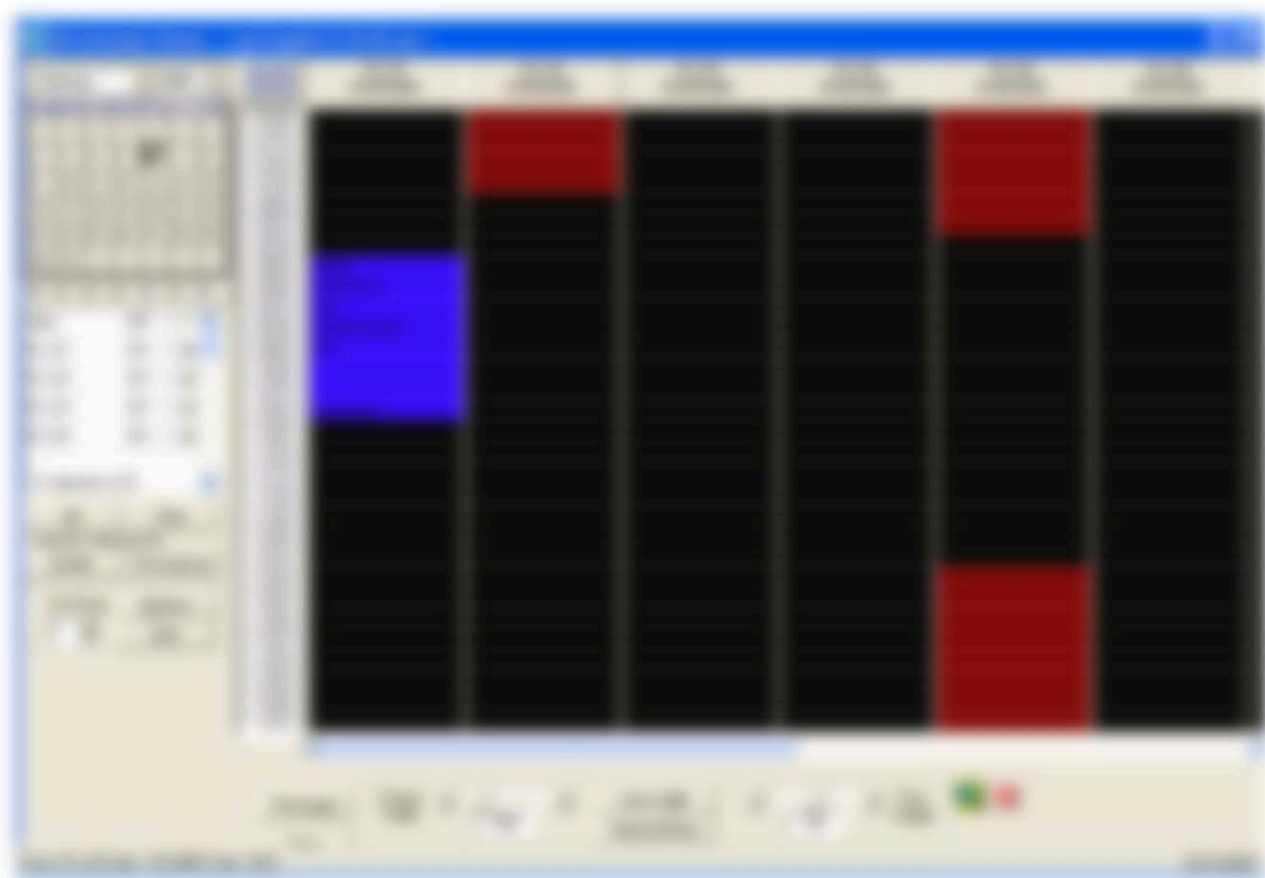
The Effect of Specific Parameters on Block Time Utilization Reports

Example 1

The following graphic shows an example of Block Time suggested to the system as it would have looked on the day of suggest (11/16/2016). The block suggested after the suggested release time in the block suggested period which is considered an automatic release within the system.

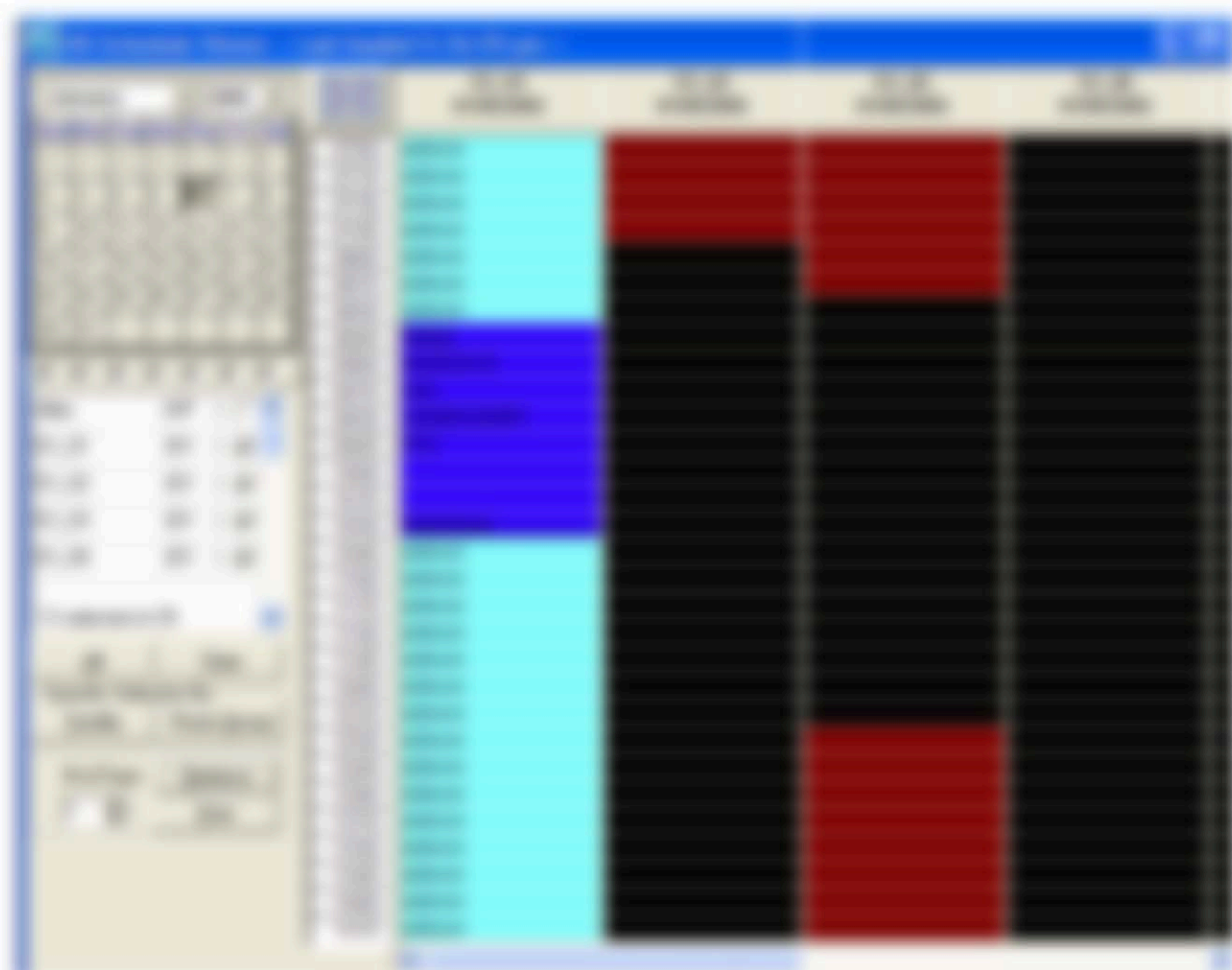
Reports

Block Time Utilization Reports



Example 2

The next graphic shows how the block appeared in the Gantt chart. Notice the yellow and red segments in the plot.



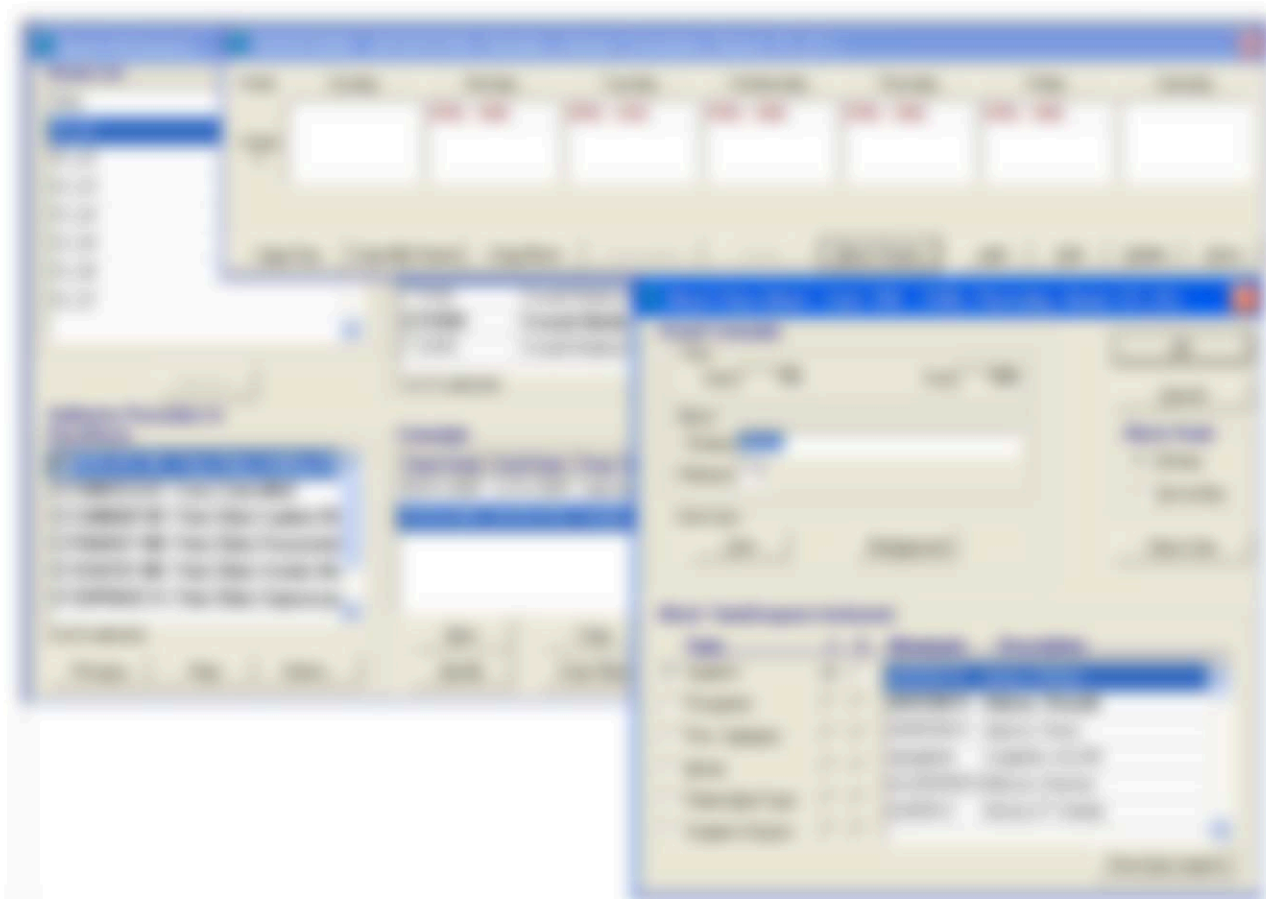
The right time data above shows the block assigned to the status from 0700 to 1000, and the left time data is the loading.

Example 2

The block defined in the screenshot above in the previous example could be defined using the parameter blockload value. This example shows that the status has a block in Thursday from 0700 to 1000 with 10 hours status time in 0700 to 1000. The loading shown in the screenshot above that the block duration value is 10 hours. The status and time of all status time between 0700 and 1000 are included in the block time column of the report.

Reports

About Time Utilization Reports



The additional panes in the report represent the following scenarios:

1. Below: performed the operations in 01_01 up to 01/01/2000 because of emergency for another project (work up to 01/01/2000), and the change order decided to start the emergency in 01_01_01. Below: buildings were originally planned in 01_01. Now, in completed status, you see the 01/01 report along with the data presentation.

Example: From 01/01 to 01/01/2000 and 01/01/2000

Reports

Work Time Allocation Report

All Manager Report Work Time Allocation Report

		Report Period: 01/01/2018 - 01/01/2018 Report Type: All Managers Report Status: All									
		Report by Date									
	Project	01/01/2018	01/02/2018	01/03/2018	01/04/2018	01/05/2018	01/06/2018	01/07/2018	01/08/2018	01/09/2018	01/10/2018
	Project Name										
	Project ID										
	Project Manager										
	Project Status										
	Total										

The following report will show all work on all dates that are included in the report period. The report will show all work on all dates that are included in the report period. The report will show all work on all dates that are included in the report period.

The following information is selected for the report example:

From Date: 01/01/2018

To Date: 01/01/2018

Which Time Period? All

From Date: 01/01/2018

To Date: 01/01/2018

Include Weekends? ☐

Which Time Period? ☒ All ☐ Weekends ☐ Holidays ☐ All

Exclude by Type of the Week? ☐

Include Time to Date Validation? ☐



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Category	Item	Value
Category 1	Item 1	10
Category 1	Item 2	20
Category 1	Item 3	30
Category 1	Item 4	40
Category 1	Item 5	50
Category 1	Item 6	60
Category 1	Item 7	70
Category 1	Item 8	80
Category 1	Item 9	90
Category 1	Item 10	100

Blank Manager: Manager Blank Time Allocation Report

Report for: Blank Manager
 As of: 12/31/2010
 Blank Manager: Blank Manager
 Location: Blank Manager

	Blank	Blank	Blank	Blank	Blank	Blank	Blank	Blank	Blank	Blank	Blank	Blank	Blank
Blank													
Blank													
Blank													
Blank													
Blank													
Blank													
Blank													

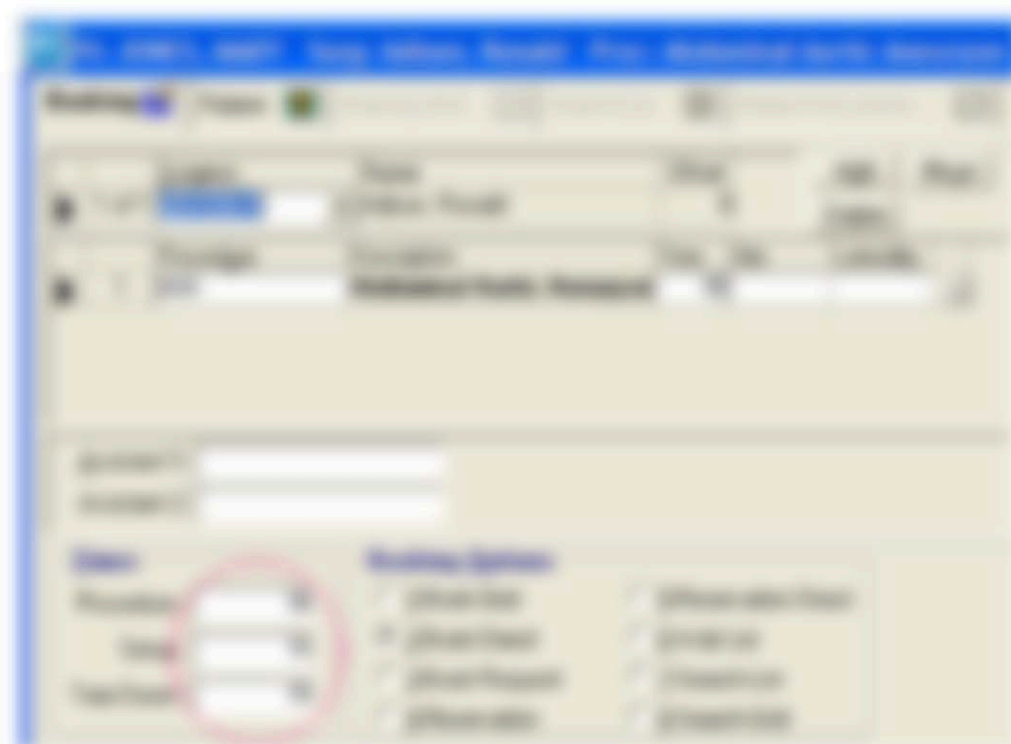
In this example, the following loading will occur based on the data in the report. Using the Blank Manager for Blank Manager, selected results in the report will be used to calculate the Blank Manager's time allocation.

Blank Manager: Blank Manager
 Blank Manager: Blank Manager
 Blank Manager: Blank Manager
 Blank Manager: Blank Manager

Blank Manager	Blank Manager
Blank Manager	Blank Manager for Blank Manager?
Blank Manager	Blank Manager for Blank Manager?
Blank Manager	Blank Manager for Blank Manager?
Blank Manager	Blank Manager for Blank Manager?
Blank Manager	Blank Manager for Blank Manager?
Blank Manager	Blank Manager for Blank Manager?
Blank Manager	Blank Manager for Blank Manager?
Blank Manager	Blank Manager for Blank Manager?

Reports

About Time Utilization Reports



Reports

Block Time Utilization Reports

Available Reports	Report Name	Report Description
Block Time Utilization Report	Block Time Utilization Report	Report showing block time utilization for all projects.
Block Time Utilization Report	Block Time Utilization Report	Report showing block time utilization for all projects.
Block Time Utilization Report	Block Time Utilization Report	Report showing block time utilization for all projects.
Block Time Utilization Report	Block Time Utilization Report	Report showing block time utilization for all projects.
Block Time Utilization Report	Block Time Utilization Report	Report showing block time utilization for all projects.
Block Time Utilization Report	Block Time Utilization Report	Report showing block time utilization for all projects.
Block Time Utilization Report	Block Time Utilization Report	Report showing block time utilization for all projects.



In this example, the data shows the only project with block time assigned is 1000000. The chart shows all other projects have the same block time utilization as the 1000000 project.

Project/Task Effects on Block Time Utilization Reports

The Project/Task report is typically used to show the block time utilization for all projects and tasks. This may be for a specific task or a range of days. Within this report there is an option to show block time.

Project: 00 User: JF0000 00 Other:

Start Date: 00 End Date: 00 Number of Days:

Number: 000000 **Blank Time** 00

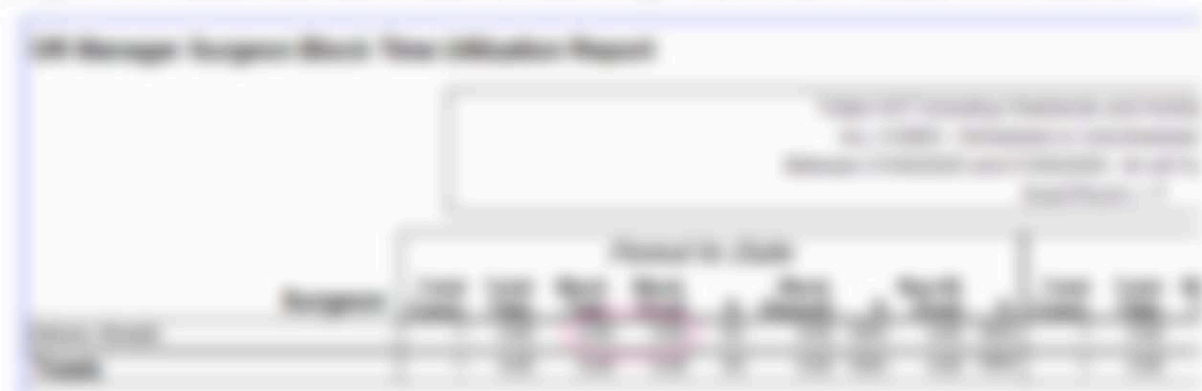
Day	Project	Task	Start Date	End Date	Number of Days
00	Project	Task	00	00	00
00	Project	Task	00	00	00
00	Project	Task	00	00	00
00	Project	Task	00	00	00

Blank Time

Project	Task	Start Date	End Date	Number of Days
00	00	00	00	00
00	00	00	00	00
00	00	00	00	00
00	00	00	00	00
00	00	00	00	00
00	00	00	00	00
00	00	00	00	00
00	00	00	00	00
00	00	00	00	00

The checkbox in this window does not actually enable or remove any blank time in the report document. Checking the box causes the system to generate the blank time in the report from any blank utilization calculations. If you do not check the box, any blank in blank time assigned to a blank type in the user will be blank. The system includes the time even though the time could not be utilized. This is because users "work against" the system in group.

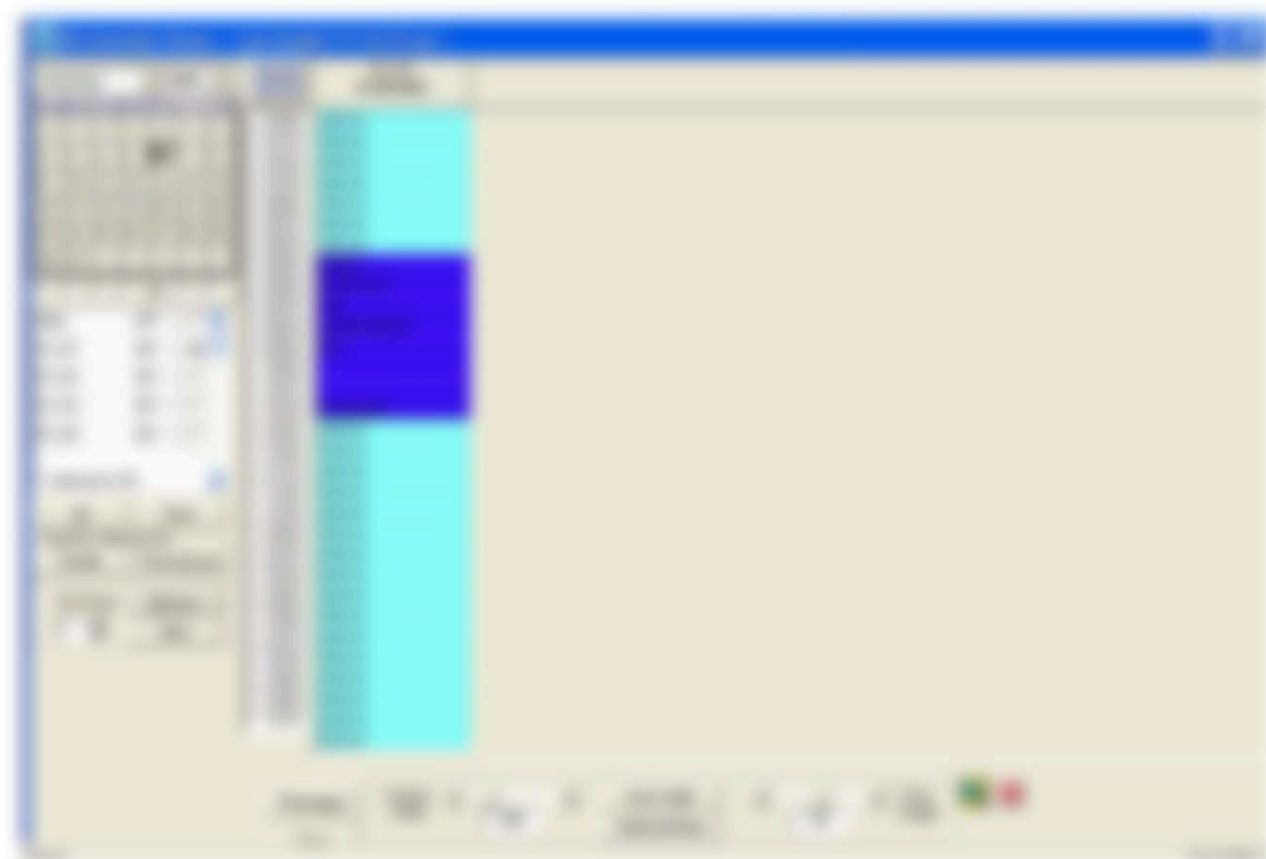
See the accompanying screenshot image below for the Project set up for the 2017-2018 reporting year. This is Project 01. Release 01 blocks originally were placed, and now the user was moved to 01.01. The Project/Phase number used is Project 01. 01 did not have Release 01 selected.



In the accompanying report example, the Project defined in the report was 01.01.01. The Release 01.01 was selected. The report shows 100.00% utilization for the Release 01.01. The report shows that although a block was in the system, the Project 01.01.01 was not available and would not be used for Release 01.01.01. This is why the report shows 100.00% utilization for the Release 01.01.01. The report shows that the Release 01.01.01 was not used.

The Effect of Releasing Blocks on Block Time Utilization Reports

This section describes how releasing blocks affects the calculations of the BTR report.



The window displays a block for the address 0x12345678 with the value loading offset as is seen in the preceding example. The block has been offset as a block offset in the block generated in the main window for user 0x1234. When the report is the window automatically sets the block to user available time for any configuration, etc. The also makes the time is calculated as designed block is the address in the Block Time Utilization report. Whether or not a loading or user block was completed in the app.

Reports

About Time Utilization Reports

Each report table is designed to automatically deliver the data in a structured manner to users. To get the most of each, you can use the available column headers and options on the table to display the following data and change settings. Use the option **Release Block** to open which data is downloadable and to set length of group.

New Booking

New Booking table

Old Booking

New Booking

Open Booking

Current Booking

Release to Release

Current Booking

New up Booking

Open Booking

Release to Release

New Booking for Supply

Open Supply Table

New Table

Open Table Table

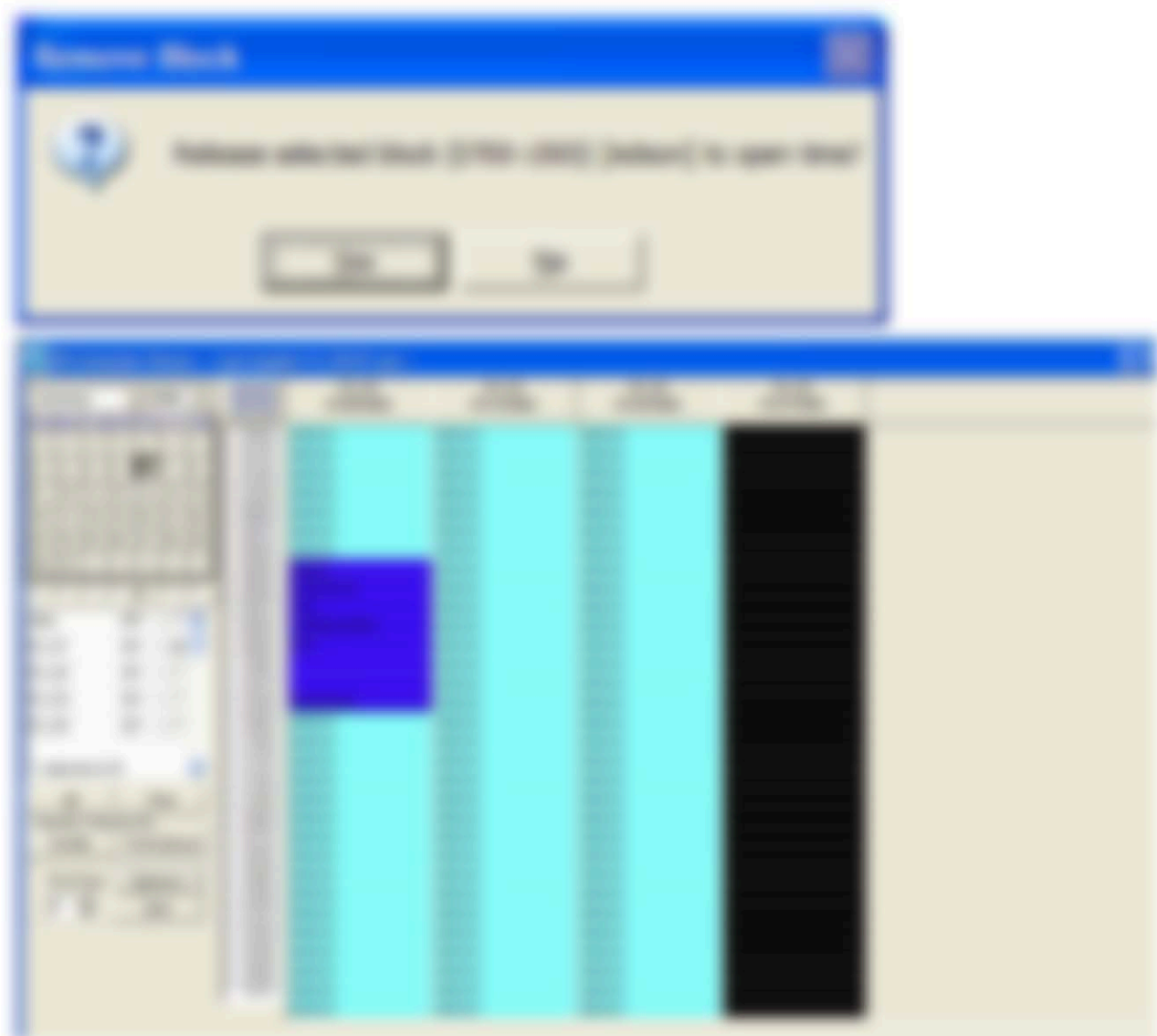
New Booking

Open Booking Booking

Open Booking

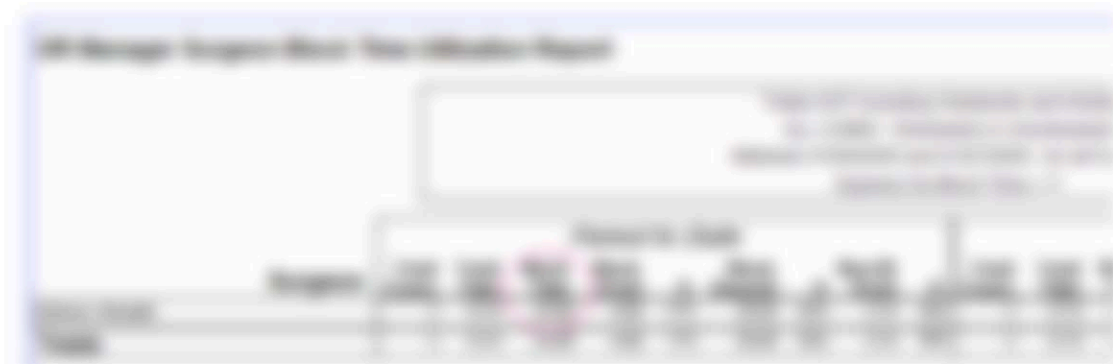
New Booking

Release Block



Reports

Surgeon Utilization Report



The **Surgeon Work Time Utilization Report** shows the top 100 surgeons in terms of total reported utilization. When the number exceeds 100, the report will show all 100 surgeons. The report will show the top 100 surgeons in terms of total reported utilization. The report will show the top 100 surgeons in terms of total reported utilization.

When reviewing the report, you can see the top 100 surgeons in terms of total reported utilization. The report will show the top 100 surgeons in terms of total reported utilization. The report will show the top 100 surgeons in terms of total reported utilization. The report will show the top 100 surgeons in terms of total reported utilization.

Surgeon Utilization Report

Menu Reports > Surgeon Utilization

Surgeon Utilization Reports allow you to see how your efficiency and surgeon time is being used. To compare actual surgeon utilization times, AllManager uses the following:

- The utilization rate in the Case Record Time Mapping document.
- Time entered in completed case records.

Steps to Surgeon Utilization Report

1. Select Reports > Surgeon Utilization

The Surgeon Utilization Report shows various reports.

2. Select the data you want to report on your report.

The Surgeon Utilization Report contains the following choices:

- **Surgeon & Time** - Shows whether you want your utilization based on, or averaged for, both the Patient's Time and the Time to Case.

- **Report as Group** (Change whether you want your report broken down by individual budget or by Budget Block Total Group)
 - **Include Percent for Open Spend Time** (Select if you want to include the times that remain open from all sets of the open available time line)
1. After selecting what sets you want in your report, click **Refresh**.
 2. Your Budget Utilization Report opens.

Report Data

Below are explanations of the Budget Utilization Report headings. Percentages may vary due to the specified date range, and they in these cases are based directly on through the total available time specified in the Period to Date -> Date -> To -> From, 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 cases.
- **% of Total** The surgeon's percentage of time spent on cases compared to the total time for all surgeons from Total Time for the Surgeon.
- **% Available Time Used** Percentage of the total available time total time that all cases used spent for the surgeon spent performing cases.

Note: Total cases is the number of reports for all surgeons, including those not in this report.

Budget Utilization Reports

Basic Reports -> Budget Utilization

All Managers' Budget Utilization Reports allow you to see how efficiently you are using your operating rooms.

To compare actual room utilization time, All Manager uses the following:

- Room duration is based on available or open closed time.
- Preparation set in the Case Report/Prep Mapping document.
- Time entered in completed case records.

Overview -> Budget Utilization Report

1. **Basic Reports -> Budget Utilization**

Report

Report Information Report

The Report Information Report (RIR) report is as follows:

1. Select the data you want to report on your report (RIR) (Source: *Report Information Report*, page 12).

The Report Information Report (RIR) report contains the following items:

- **Executive Summary** This is a brief report to tell the report to report information within a brief time. It is used to inform quickly within the brief time. The report includes only information from the report within the specified time.
- **How to Use the Report in Your Report** Select to show reports based on the selected time range within the report window.
- **Report** Select **Report** to include only reports that are defined as **Report** in the Report Information report. Select **Report** to include only reports defined as **Report** in the Report Information report. Select **Report** to include only reports defined as **Report** in the Report Information report. Select **Report** to include only reports defined as **Report** in the Report Information report.

How to Use the Report in the Report Information report

- **Include Report Information** Select to include reports currently defined as **Report** in the Report Information report.
- **How to Use the Report in Your Report** Select **Report** to use the reports in the Report in Your Report. Select **Report** to use reports in the Report.

2. After selecting the data you want to report on your report, click **Report**.

The Report Information Report report.

Report Data

Select an interpretation of the Report Information Report (RIR) report. Report is a report that you can use to report the report information report, and Report is a report that you can use to report the report information report. Report is a report that you can use to report the report information report. Report is a report that you can use to report the report information report.

- **Report Data** The number of reports defined in the report.
- **Report Data** The number of reports and includes a list to define the report's data. The report is defined in the Report Data and the Report Data report is defined in the Report Information report.
- **Available Data** Select to include only reports that are defined as **Report** in the Report Information report.
- **Available Data Report** Percentage of the report's available data is defined as **Report** in the Report Information report.
- **Available Data Report** Percentage of the report's available data is defined as **Report** in the Report Information report.

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. The report provides complete cases. It deals only with cases that have one surgeon and one procedure.

To calculate these times, AllManagement uses the following:

- Procedures set in the Case Records Field Mapping dictionary.
- Times entered into completed case records.

Steps to 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 in your report.

- **Scheduled Case Type:** Pulls from case records that are related to specific bookings.
- **Unscheduled Case Type:** Pulls from case records that are not related to specific bookings.

Reports

Preference Card Usage Analysis

1. Enter or select a **Minimum Sample Size**. This is the minimum number of cards that must fit the criteria before an average card length is generated for them.
2. Specify the **Facilities**, **Surgicals**, and **Patients** you want to appear on your report. The default is all.
3. Click **Run**.
The Average Card Length Report appears.

Report Statistics

The following statistics appear on your Surgeon Average Card Length Report:

- **Cards** The number of cards performed.
- **Mean** The average number of cards to perform the cases.
- **SD** Standard deviation is a measure, with you the degree to which each value is a far value from the mean. If all the values in the list are similar the standard deviation, the less each value varies from the mean.
- **SD + SD** Mean plus standard deviation.

Preference Card Usage Analysis

Menu Reports > Preference Card Usage Analysis

The Preference Card Usage Analysis Report analyzes the actual items on a range of preference cards that have been used and used in partial at times to tell you how many of each surgical item you are actually using compared to the number specified on your preference cards. You can then use the results window 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 window appears.
2. Select the facility whose preference cards you want to analyze. If your group uses in the facility, you can select a unit group. Click **Select**.
The Preference Card Usage Analysis window opens.

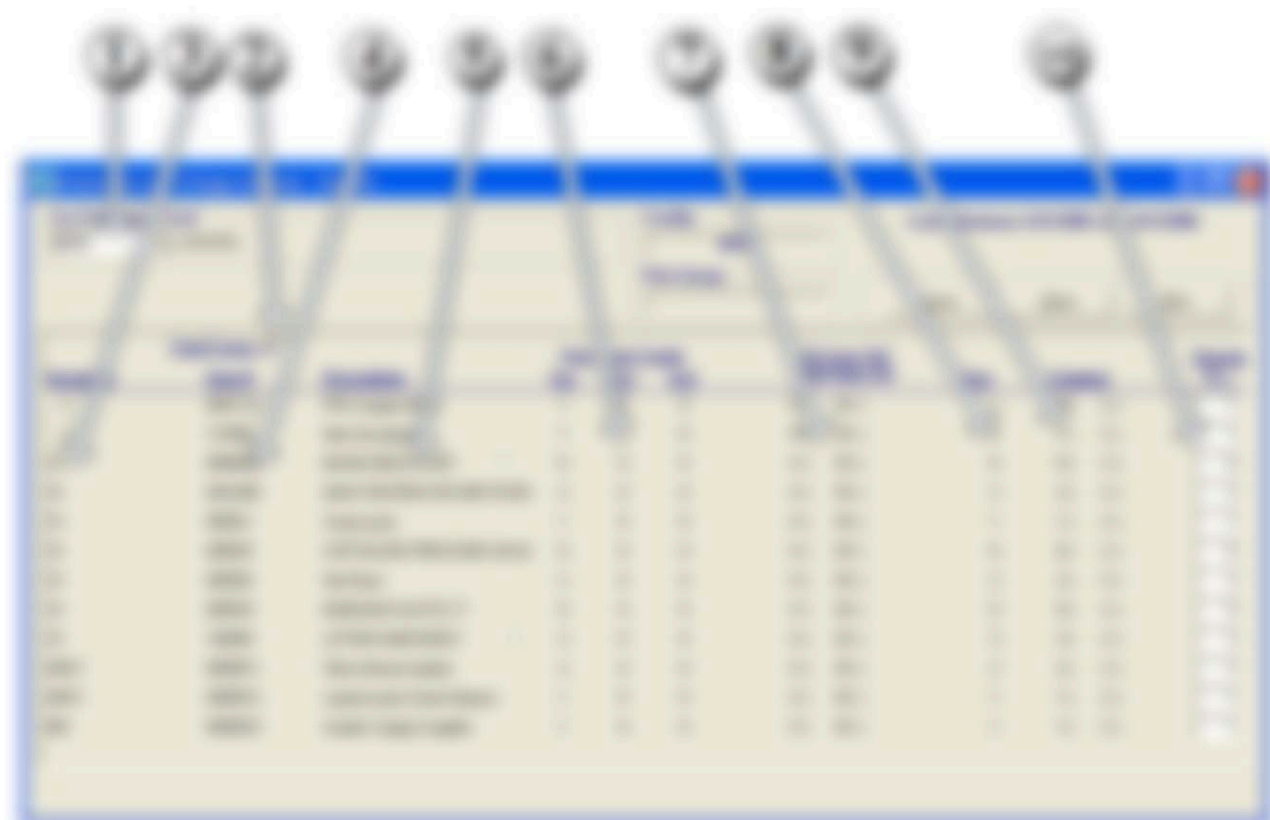
1. Select the range of preference cards you want to analyze.
2. Select the range of units you want to analyze.

Note: This can select all preference cards for all data images by leaving all of the fields blank. Using this can take a long time to select results because of the potential number of items involved.

3. Click **OK**.
The Preference Card Image Analysis - Results window appears with the list of results items from the preference cards used during the data you specified.
4. Change the quantities in the **Change to...** column as desired.
5. Select the items in the **Flag OK?** column as desired.
6. Click **Done** to return your changes.

Results Screen

The Preference Card Image Analysis - Results window shows you an analysis of each preference card you selected, one at a time.



Performance Count Image Analysis

No.	Component/Field	Description
1	File Performance Count	To view a different count, select another count in the File Performance Count box.
2	Test Count	The number of tests the test was used for during the data image was specified. - The rows in the top of the bottom of the window are for each test in the performance count. - The columns in the top of the bottom of the window contains the number and address for each test. This data describes the values.
3	Passing	Passing that the data image is correct.

No.	Column/Field	Description
1	Item ID	Item's identifier from the Stock dictionary.
2	Description	Item description from the Stock dictionary.
3	Part Cost Type	
4	Qty	These columns show the quantity of each item in the preference card for the supplier, the first identified, and the second identified.
5	It is a copy of the stock for	The number of alternatives whose supply usage differs from the number in the card. The figure $(1 - \dots)$ is the percentage of total alternatives in which the number differs.
6	Inv	The number of items actually used divided by the number of cards.
7	Inventory	The total inventory amount. The number of cards in which the total inventory amount appears is n alternatives.
8	Change to	Just the number in this row to change the quantity shown in the preference card.

Preference Card Inactive Block Reports

Menu Reports > Preference Card Inactive Block

MR Manager's Preference Card Inactive Block Report lets you see what supplies in Material Management are inactive. This is a valuable tool for managing your preference cards. For example, after you see what stock is inactive, you can quickly update the preference cards using the Storage Preference Cards window.

See the MR Manager Configuration Guide Storage Preference Cards.

Example > Preference Card Inactive Block Report

1. Menu Reports > Preference Card Inactive Block

The window for generating a Preference Card Inactive Block listing appears in the default form, which allows you to select preference cards.

Reports

Off-Turnaround Statistics

2. Choose a method to **Sort By**:

- **Performance Graph**: Generates a report of the machine clock on each performance unit in the range that you define.
- **Machine Clock**: This option generates a worksheet for machine clock. The range has the first clock in the first graph. There is the report option to show number, and **Show Summary** determines how they are grouped. Selecting **Show Summary** results in a report that shows you how you fare, with each row including the total number of units. When **Show Summary** is on, the report has a section for each day, and a line for each unit appears in the section.

3. Select a range of performance units, or select an inventory and range of clock so that you want to report on.

4. Click **OK**.

Your report appears, listing the machine clock appearing on your performance units. The following graph shows machine clock in a summary format.

Off-Turnaround Statistics

Menu Reports in Off-Turnaround Statistics

The Off-Turnaround Statistics Report allows you to set average turnaround time between units. Turnaround time is defined as the elapsed time from the end of a day's Clock Run Time until the end of the next day's Clock Run Time in the same operating mode. Clock run and end time values are defined in the Basic Information. Day Time and Clock Time fields in the Basic Report Page Mapping window.

Generate an Off-Turnaround Statistics Report

1. Select **Reports in Turnaround Statistics**.

The Off-Turnaround window opens.

2. Select date range, time range, and days of the week for which you want to run the report.
3. Optional: Select **Setup and Feedback Time**.
4. Optional: Enter a number of minutes to **Exclude turnaround time graph data**.
5. Select the data you want to appear on your report.
 - **Graphs**: Choose how you want your report window data. **Report Summary** results show data from the chosen time period into days of the week: Monday's Data, Tuesday's Data, etc.

- Choose the Facilities, Reports, and/or Report Group combination you want to use on the report.

Note: The report cannot be saved and loaded with other reports.

- After choosing the data you want to appear on your report, click **Stop**.
- Your DR Transmittal Statistics Report prints.

Report Statistics

The following statistics appear on your DR Transmittal Statistics Report:

- **Average Time:** The average time between orders within each week.
- **SD:** Standard Deviation. The number under SD represents standard deviation, which 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 placed in a temporary table. This report includes sample costs, which are used with costs that are unique in production.

Overview of Cost Analysis Report

- Cost Reports > Cost Analysis**
The Cost Analysis Report window appears.

Reports

Event Analysis Report

2. Choose the information you want included on your report.
 - **Restrictions by Event Category:** Select to add or remove the event event categories on the report. For example, if you select by category, the report shows the category's name and a restriction, then the event event categories.
 - **Tag to Date:** The event tag date displays 1 through event event date specified in the Report to Date. For example, if you specify an event tag date, the event tag date is specified.
 - **Restrictions by Event Category:** Select to add or remove the event event categories on the report. For example, if you select by category, the report shows the category's name and a restriction, then the event event categories.
 - **Event Summary:** Select to add or remove the event event categories on the report.
 - **Specific Data:** The Specific Data tag date changes according to the Specific Data you select. Select to add or remove the event event categories on the report.
3. Use the data buttons and the data buttons in the window at the bottom of the window to select the set of data that you want to report on. You can choose the data to be included in the report from the combination of Suggest, Suggest Group, Provision, Provision Category, Event Category, and Event Category.

Reports

Conflict Overview Report

Conflict Overview Report

Menu Reporting > Conflict Overview Report

The Conflict Overview Report gives you a list of all existing conflicts that were recorded during a specified time period. The report includes the following:

- Date, Time, Procedure, Suggest and From involved in the conflict that was recorded.
- The nature of the conflicts, such as the suggest not being authorized for the procedure or the user was closed.
- The username of the user who recorded the conflict.

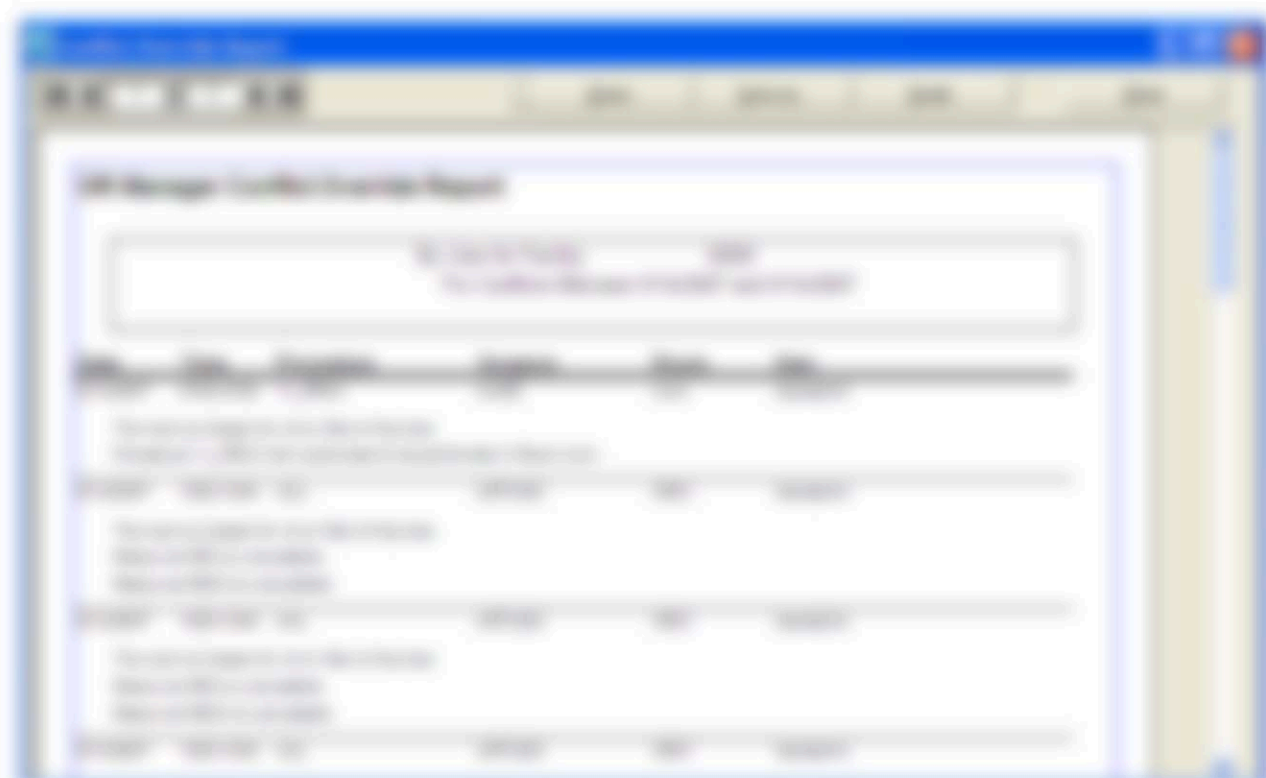
Conflict Overview Screen

You use the Conflict Overview screen to enter or select the following:

- The date range for which you want to see conflicts.
- The location 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 Overview screen to print the report.



Implant Expiration Report

Menu Reports > Implant Expiration Report

The Implant Expiration Report gives you a list of all implant items that is expiring during a specified time period. The report shows information from the implant documents, which show implant items are expired if you define your work conditions and it does not allow to expiration setting date which would cause it to report items that have been reported.

The report includes the following:

- Inventory/Stock number, Description, Serial number, Lot number and Unit and the Date of Expiration.
- Image identifier is present to support trace documentation.
- Implant type indicates whether unit is stock description.
- Expiration date does not include a time of day.
- Implant Type indicates whether an item is Stock.

Reports**Insight Expiration 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 to expire items only, but you can also select to expire items and their costs.
- 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'.
- Unit Code:** Two radio buttons: 'Expiration Date' (which is selected) and 'Expiration Date/Unit Cost'.
- Inventory:** A table with two columns: 'Inventory' and 'Unit Cost'. The 'Inventory' column lists items like 'ITEM 1', 'ITEM 2', 'ITEM 3', 'ITEM 4', 'ITEM 5', and 'ITEM 6'. The 'Unit Cost' column has checkboxes for each item.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Report

Click **Report** on the Insight Expiration screen to print the report. The graphic report shows most of the report, while scrolling in the right-hand side shows other details related to Total Cost.

Reports

Project Image Report

- The Project Description that you want to use.
- The unit number you want to use.
- The board number that you want to use.
- Image identifier.
- The image size that you want to use.
- The image type, which will be image or not image.
- In the ImageList list, you can check the image or the size for the image that you want to report. All checkboxes allow you to select all of the images in the list, while these checkboxes restrict to the selected images.

Project Image Report

ImageList

Image	Image Size	Image Type
Image 1	Image 1 Size	Image 1 Type
Image 2	Image 2 Size	Image 2 Type
Image 3	Image 3 Size	Image 3 Type
Image 4	Image 4 Size	Image 4 Type
Image 5	Image 5 Size	Image 5 Type

Image

Image Identifier: _____

Image Size: _____

Image Type: _____

Image Board: _____

Image Unit: _____

Image Project: _____

OK Cancel

Report

Click **Print** in the Report Image Report window to print the report.



Running External Reports

If your reporting needs are not satisfied using iM Manager's standard reports, the use of external reports within iM Manager gives you the ability to build custom reports using iM Manager data. iM Manager is compatible with Crystal Report Writer and external reports that are written with the program if they are to use iM Manager data.

You can run external reports from various screens in iM Manager depending on whether they are Manager Reports or Application Reports. In this topic, we show how to find and run each type of external report.

Accessing Application Reports

Application reports for meetings, case records, and publications can be all accessed from the Reports menu.

Reports

Accounting/Financial Reports

To Use This Report, Select an option in the column indicated below.	Select Reports > External Then select either None
Bookings reports	Bookings Reports
Travel account reports	Travel Account Reports
Performance cost reports	Performance Cost Reports

Note: The report may include a "Select Facility" section listing the facilities in which you have rights. If so, select the facility for which you want to run the report.

Accounting/Management Reports

Management Reports for bookings and costs provide you all information from the various management reports of the Tools menu. There are no Management Reports for performance costs. Use the table to locate the type of internal report that you want to run.

From Report	From Select Tools > Manage	Report Step
		Select Bookings Reports, and then the following:
Bookings reports	Bookings	Area Schedules
Hotel bookings reports	Pre-select Bookings	Area Schedules
Travel account reports	Travel Accounts	External Reports
Travel cost reports	Travel Accounts	Area Costs, Pre-select Booking Report

Run an External Report

To generate the type of External Report you want, use the option in Accounting/Management Reports > External Reports, or in Accounting/Management Reports > Tools > Manage. The External Reports section appears listing the application of Management reports that you can generate from the data you have and as allowed in Security Manager.

- **Book:** Select a report to add to the default series. Select **Step** to begin the operation.
- **Report:** Select a report to report a range of data or the on the network. Select **Step** to begin the operation.
- **Process:** Highlight the report you want to run. Then click **Process** to display the report.

External Report Screen Notes

- **Type selected:** Tells you the type of report.
- **Q:** Quarter Report.
- **Report of Quarter Report(s):** Select to report a copy of the report as a file on the network.

How to External Report Group

The **Web 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 destination, execute the following steps:

1. Select **Reports > External Report Group**.
2. In **Name**, select a group.
3. Click **Send** to run the group.

A

Appendix A: Perioperative Integration

Integration Overview

Integrate how you Plan, Manage, Anesthesia, Manage, and Patient Manage with OR Manager and take advantage of perioperative integration also known as "PIM" in which data entered in one application appears in others. Integration is achieved through the exchange of generic data.

Generic data refers to data that exists within an application in a standardized manner for a particular patient. It also may be received from an external system such as the HES. In general, if data that one application can display is also entered, the data is shared between these applications.

Patients located in surgery in OR Manager can be easily found in the various views in Anesthesia Manager or Patient Manager. This relationship is particularly helpful when patient chart can be retrieved at all any time.

Plan, Perioperative and Critical Care Workflow

The logical workflow for interaction with Plan applications in a perioperative environment is as follows:

OR Manager is made a priority



As well as a heading, a data record exists in OH Manager. The patient name appears in various data in other modules: the Flow Manager and Insulin Manager, allowing the patient record to be opened in these modules.

If the patient has a heading, the data record is created from the heading. If the patient does not, the record is in an emergency heading. An address code is created. When it is created, the data record represents the heading for the purpose of identifying the patient across modules.

Occasionally, when a name or assessment record is created independently, or when a patient change occurs in OH Manager, it is not possible in an emergency module to identify records. The record can be linked to a heading or data record data from the other module.

Data Flow Between Applications

Current data is shared between related records as follows:

- ▶ Between the heading and the comprehensive record
- ▶ Between the heading and the assessment record
- ▶ Between the data record and the assessment record
- ▶ Between the comprehensive record and the assessment record

Data files for some medications, dosages, and interactions in dosage recommendations data files for other types of data may be unstructured or structured, as described in the next section.

NOTE: Standard Dosage Files are optional. They are not optional and are not optional to other.

When a medication is identified in medication storage, then storage is critical to storage. When a medication is identified in medication storage, then storage is critical to storage. When a medication is identified in medication storage, then storage is critical to storage. When a medication is identified in medication storage, then storage is critical to storage.

Example: A medication is identified in medication storage. Then storage is critical to storage. When a medication is identified in medication storage, then storage is critical to storage. When a medication is identified in medication storage, then storage is critical to storage. When a medication is identified in medication storage, then storage is critical to storage.

2. Example: The data files for data elements, such as comments, the medication is medication storage. Then storage is critical to storage. When a medication is identified in medication storage, then storage is critical to storage. When a medication is identified in medication storage, then storage is critical to storage. When a medication is identified in medication storage, then storage is critical to storage.

Data Elements

The following types of data can be integrated directly:

- Dosage and interactions
- Medication Type
- **NOTE:** Medication Type is documented as a unit in medication/medication storage.
- All types
- Demographic data (patient name, address, etc.)
- Diagnosis (ICD-9, ICD-10, and ICD-11)

NOTE: The "Diagnosis" diagnosis type code is the "diagnosis" type code in ICD storage. When data is the type code in ICD storage is the "Diagnosis" type.

- Name Medication

Appendix B. Interoperable Integration

Data Elements

- Medical Team: Anesthesia/Analgesia and Surgery
- Observation events: See Observation Events on page 100

Note: Only observation events with event type "Observation Event" are shared.

- Procedures: including any modified procedure entered in the ICD Manager tooling or user device

Note: Information entered in the ICD updates all applications. If the ICD user is Meditech, configuration and updates entered up in the ICD are reflected in ICD Manager, Physio Manager, Anesthesia Manager, and PACS Manager.

See the Guide to Dynamic Data Exchange

The following table shows which data entered in different applications appears in an integrated system.

Data entered in an ICD Manager tooling			
Data	Physio Manager	ICD Manager Tooling	Anesthesia/PACS Manager
Images and annotations	Yes	Yes	Yes
Demographic data	Yes	Yes	Yes
Procedures - Physio	Yes	No	Yes
Event notifications	Yes	Yes	Yes
Medical Team - Anesthesia/Analgesia	Yes	Yes	Yes
Medical Team - Surgery	Yes	Yes	Yes
Procedures	Yes	Yes	Yes

Data entered in Physio Manager			
Data	ICD Manager Tooling	Physio Manager	Anesthesia/PACS Manager
Images and annotations	Yes	Yes	Yes

Appendix B: Postoperative Integration Data Elements

Data element in: Primary Manager			
Item	PM Manager Existing Tables	PM New Tables	Integrations New Tables
Appointment Technology Primary	Yes	Yes	Yes
Demographic data	Yes	Yes	Yes
Registration - Primary	Yes	Yes	Yes
Registration - Primary	Yes	Yes	Yes
Registration - Registered	Yes	Yes	Yes
Phone notifications	Yes, if the scheduling is not related to a new record Yes, if the scheduling is related to a new record	Yes	Yes
Medical Team/ Appointment/Technology	Yes	Yes	Yes
Medical Team - Registered	Yes	Yes	Yes
Providers	Yes	Yes	Yes

Data element in: an PM Manager Table Record			
Item	PM Manager Existing	Primary Manager	Integrations Primary Manager
Appointments and appointments	Yes	Yes	Yes
Appointment Type	Yes	Yes	Yes
App Type	Yes	Yes	Yes
Demographic data	Yes	Yes	Yes
Registration - Primary	Yes	Yes	Yes

Appendix B. Interoperable Integration

Data Elements

Data element is in OH Manager User Record			
Name	OH Manager Existing	Prime Manager	Healthcare Policy Manager
Progress - Policy	No	No	No
Home notifications	No	No	No
Medical Team - HealthcareManager	No	No	No
Medical Team - Progress	No	No	No
Insurance events	No	No	No
Providers	No	No	No

Data element is HealthcarePolicy Manager			
Name	OH Manager Existing	Prime Manager	OH Manager Existing
Progress and notifications	No	No	No
Healthcare user	No	No	No
OH user	No	No	No
Demographic data	No	No	No
Progress - Policy	No	No	No
Progress - Policy	No	No	No
Progress - Progress	No	No	No
Home notifications	Yes, if the setting is set to be in a user record No, if the setting is set to be in a user record	No	No

Data element in Incentivize/Policy Manager			
Item	PM Manager Existing	PM Manager	PM Manager New Feature
Medical Team - Incentivize/Policy - Incentivize Monitoring - Incentivize Policy - Incentivize Provider - Other - Other Policy	No	No	No
Medical Team - Budget	No	No	No
Medical team	No	No	No
Provider - Incentivize provider - Other	No	No	No

Concurrency

The PM information is only generated from Incentivize/Policy Manager. Policy Manager is Critical Care Manager. Thus, all critical information is integrated into a single PM Manager. Changes are not affected with the user roles and supports the system.

If you want to change the user integrated into the system, you can use from Incentivize/Policy Manager. Policy Manager is Critical Care Manager, and another user from PM Manager. The PM information is only generated from Incentivize/Policy Manager. The user is only updated or not they want to continue with the system.

For example: PM is not a value of 'update'. This PM is a leading role PM.

1. User 1 can update the PM information system in Incentivize/Policy Manager. Policy Manager is Critical Care Manager.
2. User 1 can update the PM information system and PM is updated with the value 'update'.
3. User 1 can update PM Manager and update the leading status in the system. User 1 is adding.
4. User 1 can update the leading from other PM is a leading.
5. PM is updated from the original value 'update'.

6. U changes the value of head to tail and stores tail in next .
7. U will now repeat the above and changes the value of head to tail and stores tail in next again.
8. It continues doing this till tail becomes null (that is, tail is null) and sets the next to null (that is, setting the value to null).
9. If U returns true , the new value of head will be tail . If U returns false , the current value of head is already tail .

1. Step 1: **Ctrl** opens the "DB Information" screen in Database Manager. From Manager, a linked table Manager.
2. **Ctrl** clicks the "Database" tab and then it appears with the value value "table".
3. Step 1: **Ctrl** opens DB Manager and adds the loading status to the address. **Ctrl** is adding.
4. **Ctrl** opens the loading form where field it is located.
5. Then it appears there with its original value "table".
6. **Ctrl** changes the value of field it is "table" and clicks **OK** to save.
7. **Ctrl** will save "table" as the value and changes the value of field it is "table" and clicks **OK** to save changes.

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Note: Integrated tools can not be used with the standalone Incentive Management 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 may be either from Preoperative and Intraoperative Case History, such as Preop Manager, Incentive Manager and PACU Manager, with certain exceptions. Patients can not be linked to other records in other modules or records in OR Manager.

- A patient change must be performed 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 entered for the wrong booking.
 - An add-on case for an upcoming patient was entered with a temporary name and identifier and the patient has since been identified.

If a case record has not yet been entered, any change to the patient in the booking affects records in Preop Manager and Incentive 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, some of Incentive Manager and Preop Manager records show in the following manner:

Case	Note
A change record is open for the patient in the other module.	This module will display a message notifying the user of the change and then update any open record automatically. After the change, the Incentive Manager will display the record correct. Any other changes to the configuration of the patient must not be lost because the system restores the default configuration when changing the patient.

The views expressed in this paper are those of the author and do not necessarily reflect the views of the European Central Bank.

When comparing the results of the two groups, we observed that the patients who were in the treatment group were more likely to be in the group of the control group. When comparing the results of the two groups, we observed that the patients who were in the treatment group were more likely to be in the group of the control group.

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Appendix B: Postoperative Integration

Changing the Patient using ICD Storage

Action	Result
Reading patient for ICD status from the ICD	Patient-specific data is imported from the ICD into the reading.
ICD record created for ICD status from the ICD	Patient-specific data, including a Permanent string, is imported from the ICD into the case record.
An evaluation is created in Proxy Manager for ICD status and in the case record and a case string is added to the proxy evaluation.	The proxy evaluation stores data with the case record. Both the case record and the proxy evaluation use the case string, Permanent and case.
The patient is changed in the reading from ICD status to ICD status.	The reading sends the ICD patient data for ICD status to the proxy evaluation, sets the Permanent string, the case string is set.
Location, add case string to the case record and save the record. Then delete the string.	The system will save all string information from the case record in the proxy evaluation upon synchronizing the records.

Restrictions

A system using other modules will report a patient change in order to maintain data integrity in existing records. When this happens, ICD Storage displays the following message:

This change does not affect any related records in other Proxy Management and related tool applications.

Do you wish to proceed?

If you click **Yes**, the patient changes only in the reading or case record records in the other modules continue to use the original patient name and data entered in case record do not flow in 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, Healthcare Manager must be unable to comply if the second patient's first admission included an earlier stay in the ICD.
- The other module contains records for that admission to both the original and second patient and those admissions overlap.

Example

An unidentified emergency patient is this article is unique. The patient's real name is Rebecca Smith and she has an open Proxy admission that is currently in progress.



Appendix B: Reproductive Integration

Changing the Patient Using IIF Storage

An **active user** is created under the name **1**. This user is assigned patient ID

It is added to **Healthcare Storage** for **1** day.

After 1 day, the patient's healthcare record is transferred when the patient expires.

Step 1. The patient is the **PHOTO**. You try to change the patient in the user record in **PHOTO** mode. The system shows the user **PHOTO** attributes in **PHOTO** mode and returns you that the change. If added user will not trigger a corresponding patient change in the healthcare record for **1** day.

Step 2. Next steps: If you do change **PHOTO** mode and need the change patient again? The change record will be applied to **PHOTO** mode. **PHOTO** attributes contain some conflict with the attributes in **PHOTO** mode. The system cannot reconcile the two sets of data for the same user record.

- The user updates the record in **IIF Storage** and the record in the other module was created separately from the other module when the patient change during.
 - For example, a record was added in **Healthcare Storage** and then added to a building, you try to change the patient in the building.

In **PHOTO** mode, you can proceed with the change in **IIF Storage** for the corresponding records in the other modules will not follow after the change. The records will no longer exist later.

In other mode, a patient change in **IIF Storage** will not be detected by the other modules.

- You change the patient in the building after a user record was created. After a user record is created, the user record copies the patient details in the integrated system. Changing the patient in the building must cause the user to delete the building and the other records. If a patient change that is different to add the building and the user record, you should perform the action separately in each module. Only the change in the user record will affect the other modules.
- The user is building that is added to an user record in another module and you attempt to add a user record to that building.
 - For example, a record was added in **PHOTO Storage** and then **Healthcare Storage** record is a building in **IIF Storage**. The user is added to the user record and then you try that user record in the building. The user record will be added to the building but the user in the record in **PHOTO Storage** and **Healthcare Storage**.

In **PHOTO** mode, you may be able to link to the record in **IIF Storage** manually from by using the user **PHOTO** connected to the **PHOTO** user in **Healthcare Storage**. **PHOTO Storage** is linked **PHOTO Storage**.

Troubleshooting Frequently Asked Questions

Q. I created a user record by registering a building in the **IIF** database mode. Why don't I see the user patient name in the selected grid?

A. Changing the patient in the user record may not affect the building. If you need to use the changed patient name in the grid, you must add the building separately.

Appendix B: Participative Integration

Changing the Patient using IIF Manager

Q: I changed the patient in a booking at the same time as I had a record for the same patient open in FrontDesk Manager. Why didn't the patient change in the record in FrontDesk Manager?

A: Did a new record exist in IIF Manager before you changed the patient in the booking?

If yes, repeat the patient change in the new record and it will change in FrontDesk Manager.

If not, did you enter the record in FrontDesk Manager under the name of the current patient before you changed the booking to show the same patient? You can link the appointment record in the new record by using the Link Record command at the Patient menu.

Q: I have an appointment record that is linked to a booking. If I had a new record for this booking, will the new record and the appointment record share data?

A: No. You would have to enter data for overlapping fields in both records.

Q: I changed the patient in a new record. When I look at the patient's record in FrontDesk Manager, I see that the charges and procedures I entered before the change are gone.

A: When performing the change, you entered a patient that already existed in the system. The patient record updated the patient data from this record. If the data you entered in FrontDesk Manager before the change is valid for the patient whose name is now in the record, you must enter it again.

Q: I want to change the patient in a new record to a new patient in the system. I want that a New Patient button in the screen.

A: You can only create a new patient when changing the patient in a booking. If the new record hasn't been entered yet, you can click Cancel to enter the current patient during changes. Change the patient in the booking and then create the new record.

Q: I changed the patient in FrontDesk. Why don't I see the change in the record I have open in FrontDesk Manager?

A: The change won't appear in FrontDesk Manager until you create a new record.

Q: I entered the wrong booking when creating the new record (name instead of birth). By accident, I want to change the patient in the new record to birth but I can only search for the new patient name in Print Manager. What will happen to this patient's data?

A: Patient changes in IIF Manager affect all related records in Print Participative and Clinical Tools. Therefore, the participative record for patient name will be transferred to patient birth. You can correct the situation manually as follows:

1. Change the patient in the new record that name is birth.
2. Open Print Manager and print the summary for patient name (participative evaluation case) under the name of patient birth.
3. Review the data for accuracy.
4. Delete all data in the Print Manager record that does not apply to the patient birth.
5. Start a new participative record for patient name.

B

Appendix B: Theatre Manager for UK Sites Only

Overview

Theatre Manager is the UK version of CM Manager. The differences in functionality are as follows:

- All accounting has been replaced by all accounting. See Accounting Differences on the left.
- Basic Time-sitting has enhancements. See Basic Time-Sitting on page 100.
- **Bookings**
 - Booking a singer in a booking is optional.
 - Bookings include a Consultant and Consultant Representative field.
 - In Report on Results, a Book Description is added.
 - Booking Audit Trail includes Consultant information.See Bookings on page 100.
- **Cash Receipts**
 - A Consultant Budget Field is included in Cash Receipts.
 - Cash Receipt Field Mapping includes Consultant field.
 - The Consultant field and Consultant Representative field in cash is added.See Cash Receipts on page 100.
- **Consultant Books** may be checked for updates. See Configuring the Consultant Books on page 100.

- **Custom Properties:** These include Connection and Connection Properties information. See *Custom Properties* on page 237.
- **Custom Worksheets:** These include Connection and Connection Properties information. See *Custom Worksheets* on page 237.
- **Storage Settings:**
 - Information for Connection, Connection Properties, and Modification Properties are visible in Storage Settings window.
 - Connection Property is a search parameter and information in Storage Settings.
- **See Storage Settings** on page 237.
- **Storage Class Property:**
 - Information for Connection and Connection Properties are visible in Storage Class Property window.
 - Connection is a search parameter and information in Storage Storage Class Property.
 - Address name include a field for a connection.
- **See Storage Class Property** on page 237.
- **Web Monitor:** Oracle Manager displays the Web monitor in all systems and provides the user option Web. See *Web Monitor* on page 237.
- **Reports:** The following reports include connection information:
 - Oracle Connection Report
 - Basic Data Monthly Connection Report
 - Detailed Data Monthly Connection Report
 - Connection Settings Report
 - Session Time Information Report
 - Basic Session Summary Report
 - Session Information Report also shows session in graph.
 - Connection Storage Class usage Report
- The **Workarea** screen shows you to select Connection and Connection Properties selection. See *Workarea Screen* on page 237.
- The **Workarea** table format is used for display and data entry.
- **Addressbook** can include the Property field and all related values.

Terminology Differences

The following table shows differences in terminology.

Each page here has been updated to reflect all items.

Block Time Screen

The Block Time screen has additional fields:

- Primary Connection
- Region
- Connected Headphones
- Headphones

The Block Time screen has an additional table button:

- Connected Region

Bookings

The Booking screen has additional fields:

- Connected Headphones
- Connected

A connection must be selected when creating a booking. The value of a region is optional. If the user does not make an entry, available Headphones/Primary defaults provide a value. If Headphones/Primary defaults cannot provide a value, the booking will be saved with the first item.

Block Description in Search and Results

The Search and Results screen is a result of using Theater Manager software in the Bookings. Creating the search creates a table list, from which you can select a page. Block Description appears in the table list.

- Connected Headphones

Booking Audit Tools

The audit tools for bookings show the following information:

- Connected Region

Case Records

The Case Record includes an additional field:

- Consultation Suggest

If you cannot be reached without a value in the Consultation Suggest Field, by default, the value in the Consultation Suggest field is the value in the Consultation Suggest field in the associated building.

Active Cases

The Active Cases screen has an additional tab:

- Consulted

Field Mapping

Consultation Information Field and Consultation Information This screen appears on the Case Record Field Mapping screen.

Case Record Audit Trails

The audit trails for cases show changes in the Consultation field and changes in the Consultation Information field.

Conflict Checking for Consultant Booking

Books can be created with consultants. Conflict checking can identify the existence of a consultant who is not the consultant for the book. Such a conflict may be resolved.

Custom Profiles

The Custom Profiles screen may be configured to show either or both of the Consultation fields:

- Consultation Information
- Consultation Description

Alternatively, the workflow may be configured to show either or both of the Consultation Appointment fields.

- Consultation Appointment (optional)
- Consultation Appointment Description

Custom Workflow

The Custom Workflow may be configured to show either or both of the Consultation fields.

- Consultation (optional)
- Consultation Description

Alternatively, the Workflow may be configured to show either or both of the Consultation Appointment fields.

- Consultation Appointment (optional)
- Consultation Appointment Description

Manage Bookings

The Consultation Booking can be selected as a search item in Manage Bookings.

The options for Consultation, Consultation Appointment, and Modification Reason are visible in the Manage Bookings window.

- New Bookings
- New Booking
- Booking
- Booking
- New Booking

Manage Case Records

The Consultation can be selected as a search item in Manage Case Records.

Appendix B: Oracle Manager for ODI 11gR2 Only

WMS Number

The values for **Consolidation** and **Consolidation Description** are visible in the **Storage Case Report** window.

- Accounting History
- New Audit Trail
- Refresh Audit Trail
- Filter Cases
- Report when Standard Case Report Window is loaded

WMS Number

Oracle Manager displays the WMS number in any window where pattern data appears. The WMS number also appears in any window that contains pattern data.

Users can export the patterns in Oracle Manager using the WMS number in OracleData Case Records, Address Case Records, and EmailTrace Address Case Records in pattern WMS number queries are allowed in these windows. To simplify the export using SQL and display results with all WMS numbers starting with "001" (Pattern), selected in settings reports appearing in the top WMS number.

Reports

Oracle Schedule Reports

The **Consolidation** field appears in the **Oracle Selection** window and the **Report Output**.

- Oracle Selection window
 - Select Consolidation field
 - ConsolidationField field
 - Consolidation Oracle Selection
- Report Output
 - Consolidation Description is in Output
 - Consolidation Description Description is in Output

Basic Daily/Weekly Schedule Report

The **Consolidation** field appears in the **Oracle Selection** window and the **Report Output**.

- **Online Selection screen**
 - By Consultation report option
 - Consultation can further break down report
 - Consultation is in Selection Options
- **Report Output**
 - Consultation is in Output

Standard Daily Meeting Schedule Report

The Consultation field appears in the Online Selection screen and the Report Output

- **Online Selection screen**
 - By Consultation report option
 - Consultation can further break down report
 - Consultation is in Selection Options
- **Report Output**
 - Consultation is in output

Cancelled Bookings Report

The Consultation field appears in the Online Selection screen and the Report Output

- **Online Selection screen**
 - Consultation Online Selection field
 - By Consultation only
 - By Consultation/Report only
 - Add By Report/Consultation only
- **Report Output**
 - Consultation is in By Report/Booking Report
 - Consultation is in By Booking/Report Report
 - Consultation Book Report
 - Consultation/Report report
 - Report/Consultation report

Session Time Utilization Report

The Consultation field appears in the Online Selection screen and the Report Output

Online Selection screen

- Consultation Output is in **Specific Session Top**
 - Consultation Output is then session and output

- **Report Index**

- **Consultation Budget** (Report) (Information Report) corresponds to the Consultation Budget section in the **Reports** menu.

Consultation Budget Report

The following selections can be made for the Consultation Budget Report:

- Consultation is in the report
- Consultation amount (initials) appears in the report

Studio Utilization Report

Theater Manager includes a Studio Utilization Report. It is similar to the Budget Utilization Report in iM Studio. The Studio Utilization Report may be displayed by selecting **Studio Utilization** from the **Reports** menu.

The Studio Utilization Report has three options for viewing personnel:

- Selected consultants
- Selected engineers
- Selected engineer group

Average Case Length Report

A Consultation Average Case Length Report is available from the **Reports** menu.

Schedule Viewer

The Schedule Viewer allows you to select the following:

- Consultant
- Consultation appointment

C

Appendix C: Supply Cabinet

Introduction

It adds the new iB Manager with supply cabinet functions. iB Manager and the supply cabinet exchange messages to automatically document supplies from the supply cabinet in the respective billing code.

This chapter provides detailed instructions about using iB Manager integrated with the supply cabinet. The integration will be added to the interface in the chapter section on interface in software work and external message.

First, personnel has to set up the interface. The activities by First personnel are discussed in the following appendix in the iB Manager Configuration Guide Supply Cabinet Setup.

The chapter covers:

- Overview of the Supply Cabinet interface
- Access Features to the Supply Cabinet
- Connecting to Supply Manager and iB Manager

Overview of the Supply Cabinet Interface

The following steps describe the use of the interface:

Appendix C: Supply Cabinet

Product Features for the Supply Cabinet

- The user creates a meeting in an office app.
- The user performs an action that causes the interface to send a message to the supply cabinet, telling the supply cabinet that a cabinet has been scheduled for service. Messages sent from the Storage to the supply cabinet are called cabinet messages. Cabinet messages control information in a user's meeting. Cabinet messages are sent upon the following events:
 - Printing a cabinet** Printing a cabinet from the Storage sends cabinet messages to the supply cabinet. A cabinet should be printed when an account number is assigned to give the storage information, such as a location or type of cabinet. Printing a cabinet sends attributes as cabinet messages, so the action does not store a storage number available to system actions that allow finding the operations of the interface. Printing a cabinet does not trigger the cabinet supply storage message to be sent. Printing a cabinet from the Storage does not provide an cabinet message. Information about cabinets and cabinets is sent with the interface update data in the document. See [Cabinet Control](#) in the Supply Cabinet topic.
 - Storing an office app record** Storing an office app record sends an cabinet supply message.
 - Storing a user record** If an cabinet supply message for a user record has not been sent, sending the user record sends such a message.
 - Changing cabinet** Changing the cabinet in the user record sends an cabinet supply message. The number should be performed when an account number is assigned to storage.
- Messages to the cabinet are called from the supply cabinet, returned to the supply cabinet, or stored. All Storage automatically receives and stores messages from the supply cabinet about these requirements. Messages that the supply cabinet sends to the Storage are called cabinet messages. Cabinet messages control all the cabinet's work in a user's meeting.
- Cabinet messages are stored with the messages using cabinet keys for the user or with keys for individual cabinets. User keys store the cabinet's key messages about the cabinet, provided to the user level, and user messages may be generated. Together are stored with the queries, and to the interface of the queries, and if a query has been sent. Messages generated with the cabinet provided and user information calculated by user messages. See [Storing a Query](#), [Storage](#), and [User Messages](#) in the Storage topic.
- It is necessary to update information meeting the interface, as well not is available.

Product Features for the Supply Cabinet

It is necessary to create cabinet profiles for users that have the interface in order to display the Supply Cabinet user interface. Cabinet profiles do not display the Supply Cabinet user interface.

Cabinet profiles control the meeting in an office app record when the Supply Cabinet user interface is sent. Users in different cabinets have different views of the Supply Cabinet user interface.

not subject to interface processing. If the check box is selected, the event in the event log is processed by the interface.

When a custom printer is added for a building or an address user record, a unique identifying number is generated for the interface. The number can be made visible in the report. This number can be used in testing the operations of the interface.

Responding to Supply Messages and Error Messages

When using the interface used to perform several tasks to make sure that supplies are correctly described for:

- Information about changes in supplies appears in the Exception History window. It must be used as part of the normal work process. See *Exception History* below.
- Error messages may occur. These are displayed from a menu selection in the Exception History window. See *Error Messages in User UI*.
- Revision of supply information may be required for completed orders. See *Completed Orders in User UI*.

Exception History

UI Manager processes supply cabinet messages when the exception history window is opened. If the exception history window is closed in the user's window, messages are not processed. All new messages are processed until the Exception History window is open. The new messages will be processed when the Exception History window is reopened.

See *User UI in User UI*, *User Exception History in User UI* for general information on exception history. The section describes features added to the interface.

If UI Manager's processing of messages result in updates, the Exception History window displays a report for the listing of changes.

During the changes is part of the work flow for the interface that helps to ensure that all supplies are described for. During the changes window that the work process is performed by the system and

The following table helps in understanding the Exception History window at a site with the interface by listing the visual features and by describing how it represents data.

Feature	Exception: Missing From Memory
Not added	When a supply-related message is sent, processing starts whether the item exists in the exception table or not. The Supply Related indicator indicates if there is an error report. The Not Add is added.
Not tag	If an item is added if the item does not exist in the Supply pointer, it is the item cannot be added to the memory. If an item is added if the conditions for tag exists in all tags. These conditions are described in the preceding entry in the tag.
Supply Related flag	When tag is the number tag is non-nullable Supply Related flag tag tag is non-nullable. If the item tag is added, I indicate a supply tag the item cannot be added.
Unusable item	The items that have the same tag number in the exception table are identified as unusable. The items and the other identified as unusable is not added to the memory, all changes together.
Wrong item	The items that have the same tag number in the exception table are identified as wrong. The items and the other identified as wrong that is not added to the memory, all in wrong.
Other memory	Other memory cannot be added to memory from the supply-related table. If a supply-related message is the indication tag. The tag Other item indicates that memory is not managed in Other memory.
Memory	Memory that are mentioned in the message sent to the supply-related are mentioned in Other memory. Other memory is not in memory and other memory. When a supply tag of number is in the message, it other item is the tag added in the exception table.
Tag/Pointer	Tag/Pointer and Tag/Pointer cannot exist. When is added to message from the supply-related and not there, then item is added Supply Related flag tag.
Tag tag	The tag is not included in message from the supply-related. Other memory will update the tag tag that is tag in the tag in the exception table. If an item is the tag, difference between supply tag added item in the exception table.

Message	Description: Supply Status Response
Accepted Order	If an order is accepted into the Transportation Working Order, then it will be a supply-related order. It will not automatically get updated the next time an order is added. When you go back into the messages and update, and then go back into the messages and update, the user of the system will understand that it is not that in the Transportation Working Order. Responding to Transportation Working Order with the supply-related and non-supply-related orders, and the user that order will return adding quantity. It automatically adds. If only a supply-related order shows in working, the user will not get quantity immediately. It automatically adds.
Response Not Received	Responding to a customer and is possible. Responding to a customer and adding another order, and so the supply-related from the Transportation Working Order. The system will not receive a response. In the general information on responding customer order. Responding to a customer and is not available.
Order Cancelled Warning	If the supply-related order is supply, it is a user that is not supported in the system. In the user, all message processing is not supported. The user is not supported.

The Transportation Working Order is used in transportation working. When with the messages and is not available. Supply-related order and so the Transportation Working Order. It automatically adds to the order and returns a supply that the messages and update.

The supply-related order in the Transportation Working Order is response for any order that shows a selected Supply-related order and so. The automatic all message from responding customer order and from the supply-related.

The information that a user will not be in transportation working is limited by permissions and by permissions. Permission is needed to delete and to add quantity, or number, or order number for a supply-related order.

Error Messages

Error messages about how information used by the supply-related is all message that could not be processed in the system in the Transportation Working Order.

How and Handle Error Messages

- The user can error messages by selecting that Supply-related Error in the right-hand menu of the Transportation Working Order, as shown in the following graphic. The user will then appear only error and messages and so. The focus must be under **Supplies** in the system is showing the error message.

Appendix C Supply Catalog

Procurement in Supply Manager and Order Manager

Item	Item Name	Item Type	Item Category	Item Description	Item Unit	Item Price	Item Quantity	Item Status
1	Item 1	Item 1	Item 1	Item 1	Item 1	Item 1	Item 1	Item 1
2	Item 2	Item 2	Item 2	Item 2	Item 2	Item 2	Item 2	Item 2
3	Item 3	Item 3	Item 3	Item 3	Item 3	Item 3	Item 3	Item 3
4	Item 4	Item 4	Item 4	Item 4	Item 4	Item 4	Item 4	Item 4
5	Item 5	Item 5	Item 5	Item 5	Item 5	Item 5	Item 5	Item 5
6	Item 6	Item 6	Item 6	Item 6	Item 6	Item 6	Item 6	Item 6
7	Item 7	Item 7	Item 7	Item 7	Item 7	Item 7	Item 7	Item 7
8	Item 8	Item 8	Item 8	Item 8	Item 8	Item 8	Item 8	Item 8
9	Item 9	Item 9	Item 9	Item 9	Item 9	Item 9	Item 9	Item 9
10	Item 10	Item 10	Item 10	Item 10	Item 10	Item 10	Item 10	Item 10

The Supply Catalog Order screen opens.

- Items already purchased by changing information in the supply catalog to make the two systems synchronized. The purchased supplies are sent to **SR Manager** in the interface. Several types of messages appear in the Supply Catalog Order screen:
 - Info** Reports supplies added from the supply catalog that could not be processed.
 - Warn** Reports supplies returned in the supply catalog that do not match supplies added from SR.
 - Success** Reports successful supplies that do not match supplies added from the supply catalog.
- Creating **Item** in the Supplier History screen makes the entire part of the supply record. After an item is generated for the supply, it will show the returned value of supplies are sent again from the catalog with the correct quantity. The only exception possible is by inserting a combination with other supplies of items. The **Supplier History** screen is used for the general information of receiving combination with.

Completed Cases

Supply supply information in the Supplier Item page and Supply Item page messages for completed cases are also captured in the pending section. These cases may also be added to 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 gain permission to opening completed cases.

Procurement requests evaluation of completed cases to assist a listing of requested supplies and to track the activity of the Performance Case Usage Report and the Case History Report.

Identify and Open Completed Cases

The use of a completed cases section is necessary in order to process supplies, as described earlier in this chapter. The following steps explain how to work on completed cases without making work in other stages.

1. If a completed case has requested supply messages, a message appears at the bottom of the Supplier Item page.
2. To process outstanding supply messages for completed cases, select **Tools > Process Supply Catalog Data**.

The Process Supply Catalog Data screen appears. In the following graphic, the set screen option is the Message (1) which indicates that the screen allows you to update only completed cases.

3. Enter selection criteria for the completed cases to report on. Enter report specifications in the same manner that you would in selecting for other case details. Select the Case Details on Case List.
4. Click the **Refresh/Run** button.



The Process Supply Catalog Data screen appears with the cases that you specified. Cases are all on.

5. Optional: Click the **Filter Categories in Supply** icon to investigate which categories and the order in which they are displayed.
6. Specify the cases you want to work with selecting the check box. These 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. If Supply shows the case record that is being processed.

- **New Stock:** Creates Supply Catalog Stock entries for the completed order. See [Table C-100, 101](#), [Supply Stock Attributes on page C-101](#).

D

Appendix D: Privacy Settings

Privacy Message

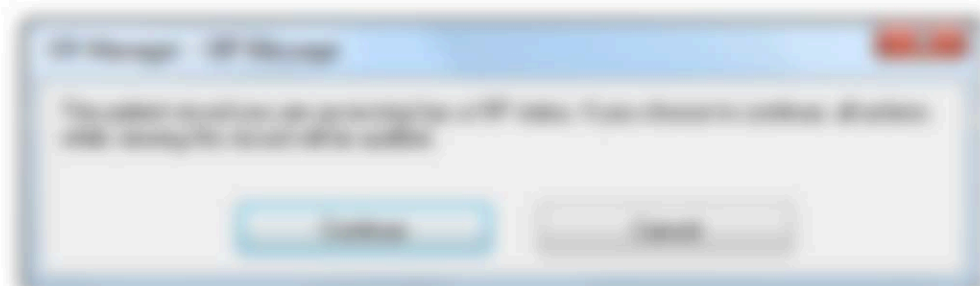
If a privacy message has been configured, users see the message when logging on. If the Privacy Message is enabled, a privacy message appears in the iM Manager user window. The message is configurable by the role. The message also appears in application windows.

This appendix documents the behavior of the privacy features in iM Manager. For more information, see the Security Manager user guide.

iM Manager

A user can designate a mailbox account as having iM access. If iM functionality has been configured, a message such as the following is shown when these accounts are accessed:

Note: The iM screen displays only if a different user logs in after user logout.



from **Settings** to view the usage and settings. The action creates an audit entry in the **System Activity Audit Report**. Selecting **Cancel** terminates the action without creating an audit record.

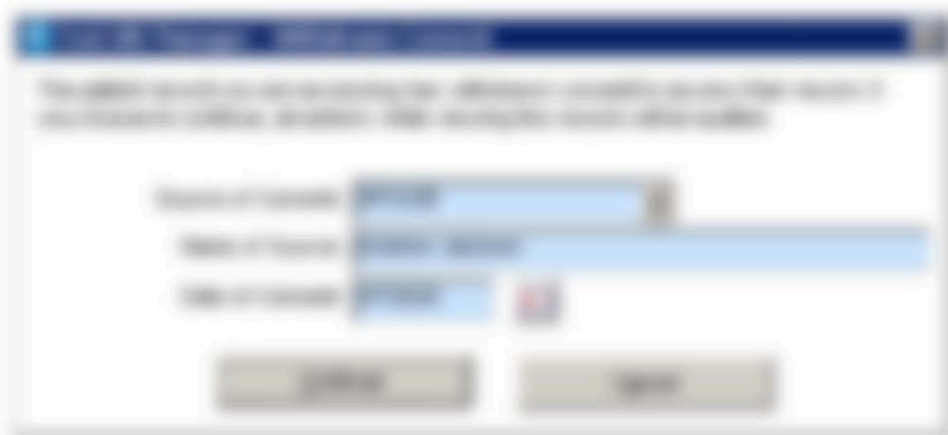
Note: The text in the message is configurable and the off warning, an associated key, is different for the previous example.

Users with rights assigned by administrators can change the off status of medical records. Such a change creates an audit entry. Off status events at the patient level:

- If a medical record has off status, including when actions on the record display a off warning screen, and the user that made a selection is confirmed. Logging is confirmed in a Off Manager action created at audit level.
- If a patient record has off status, requesting to open it displays the Off Manager screen.

Withdraw Consent Message

Patients can decide to withdraw their consent from viewing their health record data which is referred to as **Withdraw Consent**. In order to use **Withdraw Consent** patient records, a user is required to provide evidence of consent approval and may be required to enter the patient who gave permission to view it. For example, the patient is any address of the patient. The information is captured in the **Withdrawal Consent Message** for system action opening, or editing, or logging, or open record in Off Manager. **Withdrawal** is Off Manager to this record. The open record is downloadable only after viewing **Settings** in the **Withdrawal Consent Message** which creates an audit entry.



The user that 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 request: Values from the Source of request dropdown in SR Manager are listed in alphabetical order.

Name: Free text with a maximum length of 50 characters.

Role: Standard role values that defaults to custom data set is available.

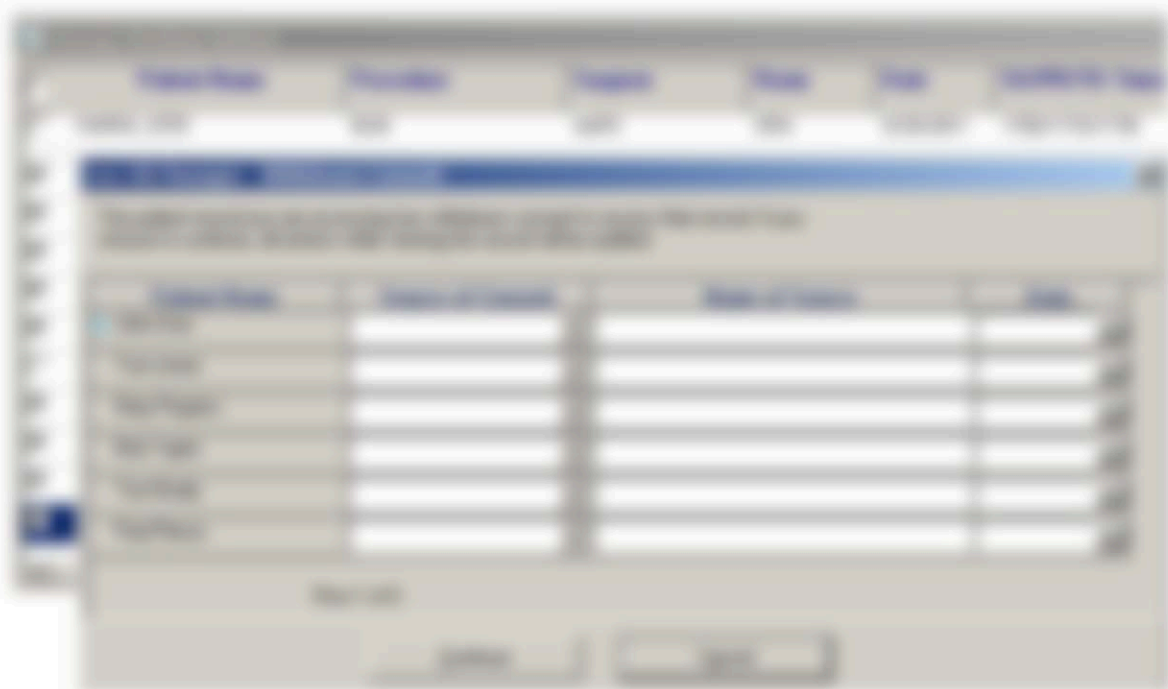
All the fields in the Windows Consent screen are pre-populated if you user has already entered previous consent information for the same subject. This applies after a user gives a pattern-based form any information. It also applies after creating a new tracking or user record.

Age: If a previous screen in the subject's record exists, the age field is populated with today's age.

Privacy

The Windows Consent message is displayed when user records or tracking records are added. The records created appear, custom appear, external appear and third party for user records.

When adding multiple user records or tracking with different consent set to active, a single display of the selected different consent appears with the different consent information provided.



Patient Access Audit Trail

The Patient Access Audit Trail, which you can display in **Off Storage**, shows changes to the **Off** status of records. The report also displays the audit information for the Patient Information Consent tool.

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 Information Consent status when the access occurred.

When a patient is both a **Off** and a Information Consent patient, the Information Consent window displays this. When the user clicks **Override the Off storage status**, **Override Information** or the **Off storage status** or **Off** the **Off** status and/or Information Consent status. **Override Information** or **Off** status results in an audit record created and the user is not able to see any patient information.

The **Off Storage Configuration** tool includes an **Appendix** that documents the Privacy Manager, **Off**, and Information Consent features in more detail relative to **Off Storage**, **SmartPhone**, **Security Manager** and **Off Storage** that records.

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