Bed Census User Guide

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Bed Census

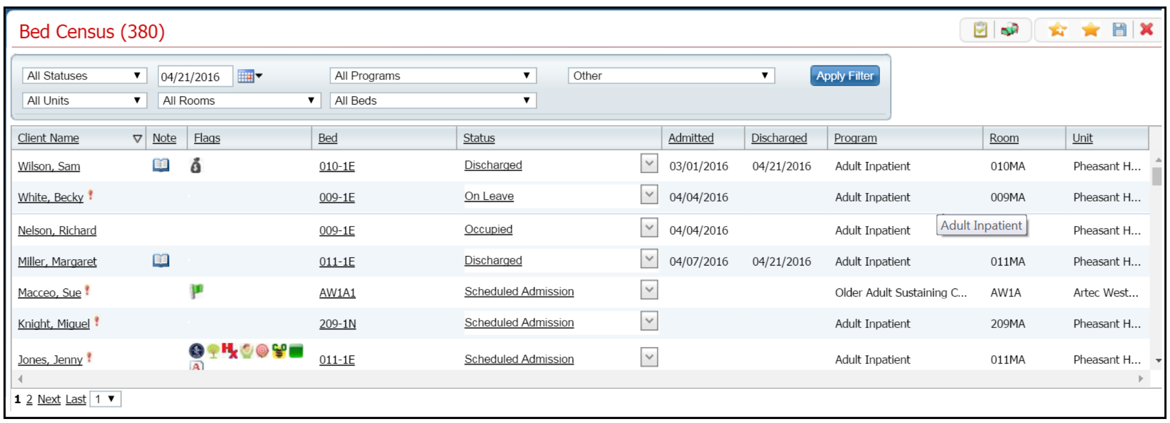
Using Bed Census

Bed Census is used to manage the beds in a residential facility. The beds are assigned to a Program. The *Bed Census* shows all beds and identifies whether the bed is in use or not. The *Bed Census* provides additional information about each client. You can use *Bed Census* to manage new admissions and discharges, residents' attendance, changing beds and programs.

Typically, admitting office personnel use this function, but any user with the correct permissions can access and use this list page.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential > Bed Census sub-banner.**

   The *Bed Census (###) List Page* is displayed. View field definitions (See page 69).



From this page you can:

- Filter the List Page (See page 125)
- View Bed Attendance (See page 64)
- Search for a Bed Using the Toolbar Item (See page 114)
- Export Bed Census Data (See page 63)
- Admit a Client (See page 3)
- Schedule an Admission (See page 8)
- Change a Bed Assignment (See page 14)
- Schedule a Bed Change (See page 18)
- Set a Client On Leave (See page 42)
- Schedule a Client On Leave (See page 52)
- Return a Client from Leave (See page 38)

- Schedule Return from Leave (See page 47)
- Discharge a Client (See page 28)
- Schedule a Discharge (See page 23)
- Transfer a Client (See page 61)
- Schedule a Transfer (See page 58)

Why can't I access these screens? (See page 127)

Admit

Admit a Client

Use this task to admit a client to a bed in a unit. This topic explains how to:

Admit a Client (See page 5)

Admit a Client with a Scheduled Admission (See page 13)

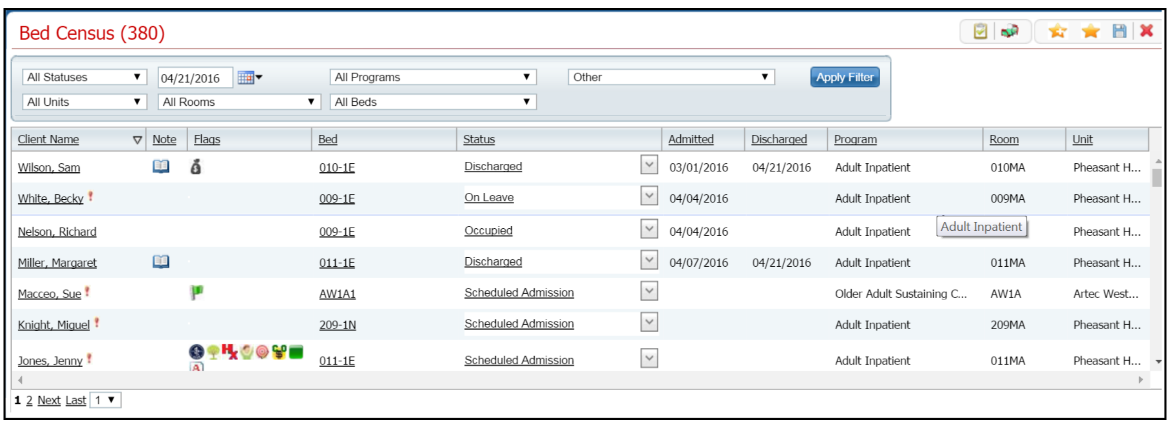
Change the Admission (See page 5)

Delete an Admission (See page 6)

To Admit a Client

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census (###) List Page* is displayed. View field definitions.

2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find a **bed** with a status of *Open*. Tell me how... (See page 111)

4. Click the **drop down arrow** in the *Status* column of the open bed you want to admit the client to and select **Admit**.

5. If a message window is displayed, this means a client account is open who is currently admitted to the facility. Notice the second tab in the menu tabs.

   a. Answer the prompt in the message window.

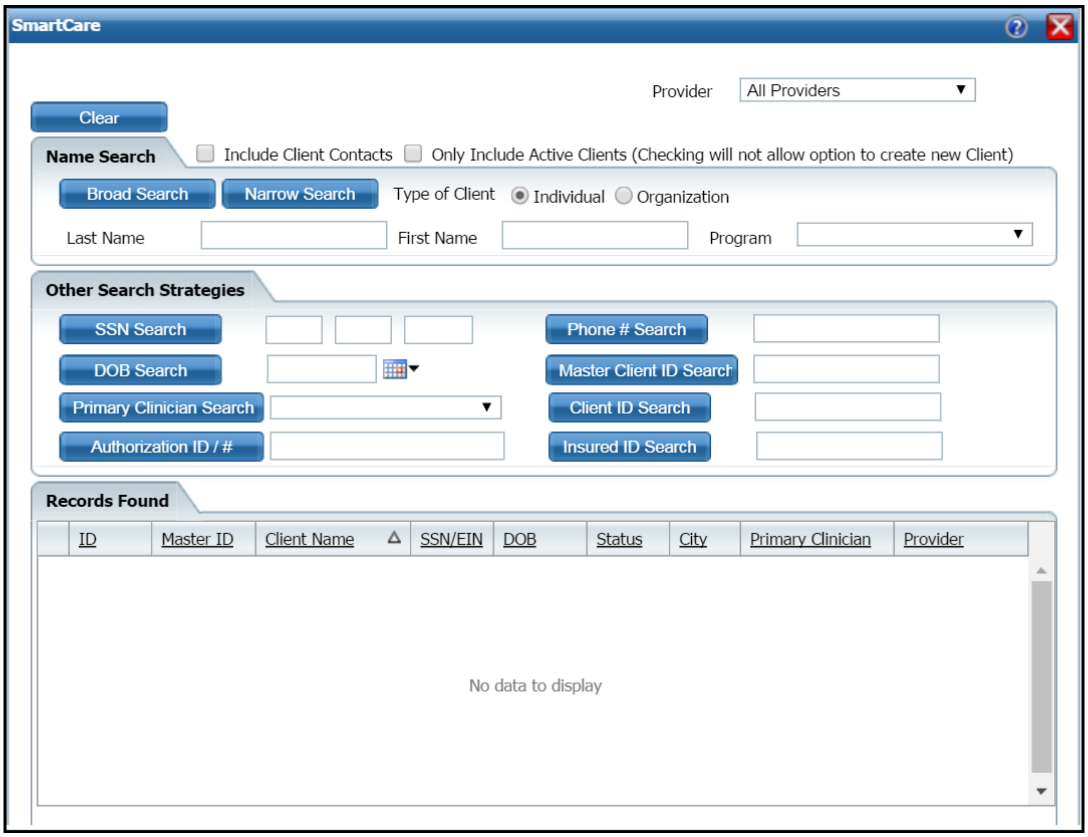
b. To admit a different client than is showing on the tab bar, select the **Open Client Search** option . Or to continue working with the currently open client account, select the ***Open Inpatient Visit Activity for client that is already admitted*** option.

c. Click the **OK** button.

-or-

If no message window is displayed the *Client Search* window appears. Continue with step 6.

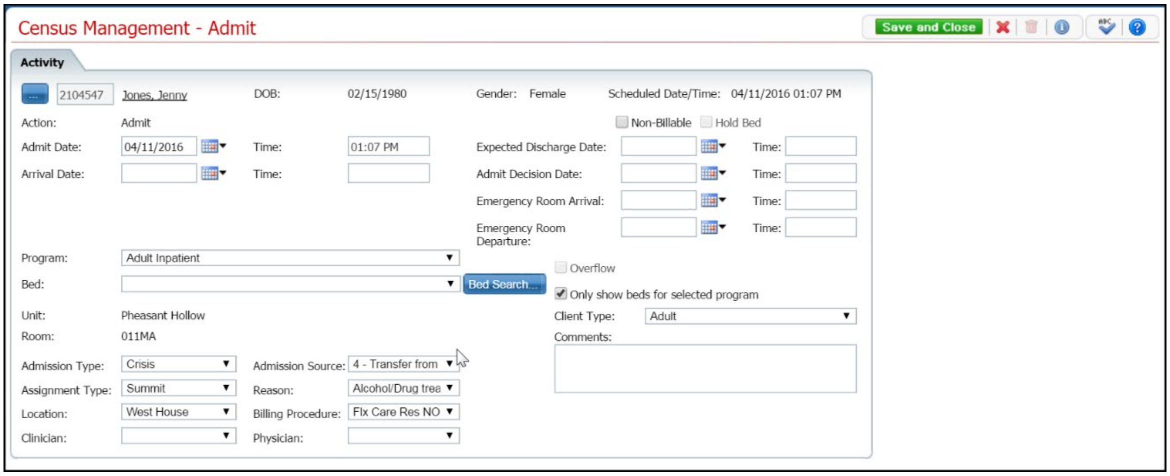
The *Client Search* window is displayed. View field definitions (See page 112).



6. Search for the client. Tell me how... (See page 112)

7. When you find the client, select the line and click the **Select** button.

The *Census Management - Admit* page is displayed. View field definitions (See page 71).



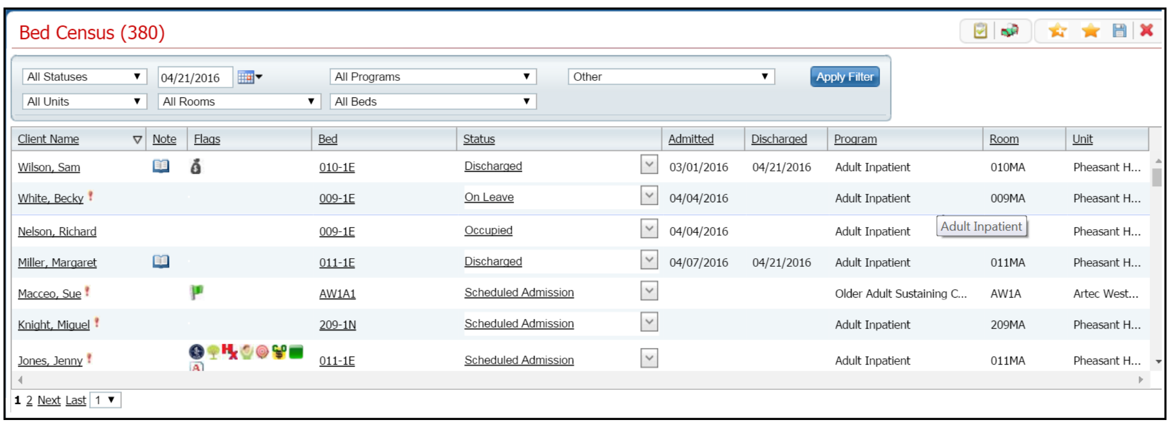
8. Complete the **required and necessary** fields on the *Census Management - Admit* page.

9. When the page is complete, click the **Save and Close** button in the task bar.

To Change an Admission of a Client

1. Follow this path: **My Office tab** > **Inpatient/Residential banner** > **Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census (###) List Page* is displayed. View field definitions.

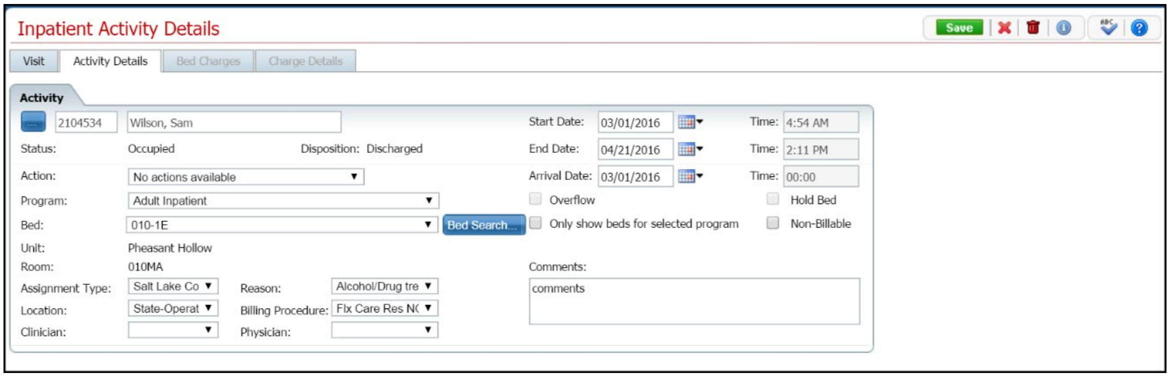


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the client whose admission you want to change.

4. Click on the **hyperlinked status** in the *Status* column.

   The *Inpatient Activity Details* page is displayed with the *Activity Details* tab active. View field definitions (See page 109).



5. Complete the **required and necessary fields** on the *Inpatient Activity Details* page *Activity Details* tab to make any necessary changes. View field definitions (See page 71).

6. When the page is complete, click the **Save** button in the task bar.

7. Click the **Exit** toolbar item to close the window.

The *Bed Census* page is displayed. The client's name is listed on the *Bed Census* page for the bed that was assigned with a *Status* of *Occupied*.

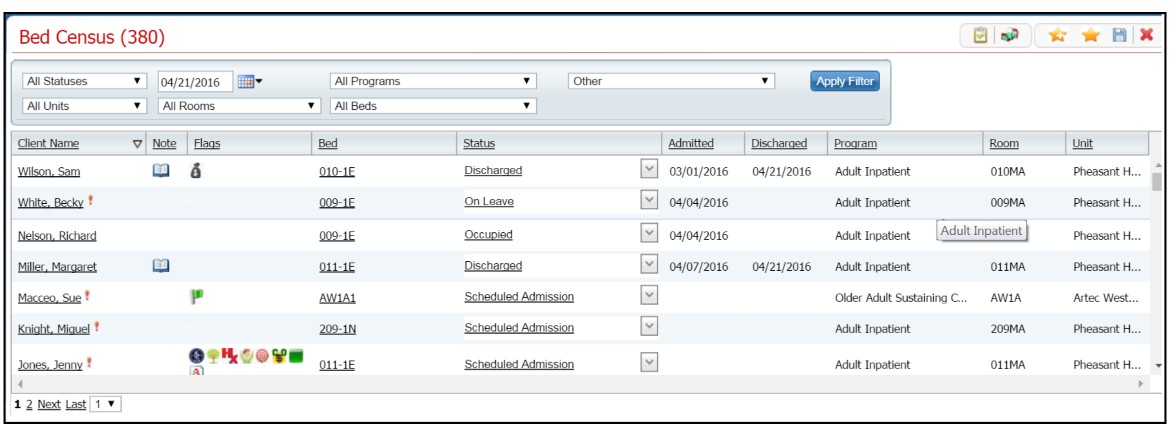
To Delete an Admission

Use this task to delete an admission.

Note: Take care when deleting data, especially if it has been used on services and billing charges in the system. Deleting existing data can cause problems with the existing records and history. Rather than deleting, you can mark the record as *Inactive*.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (#####)* list page.

The *Bed Census (###) List Page* is displayed. View field definitions.

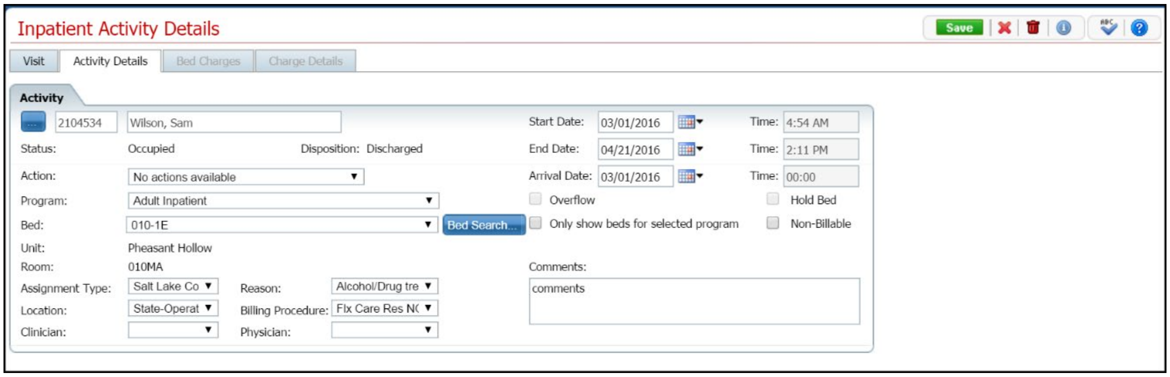


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the client and bed whose admission you want to delete. Tell me how... (See page 112)

4. Click the **hyperlinked status** (typically, it will say *Occupied*) in the *Status* column for the client's admission you need to delete.

   The *Inpatient Activity Details* page is displayed with the *Activity Details* tab active. View field definitions (See page 109).



5. Click the **trash can**  toolbar item to delete the admission.

   The *Message Confirmation* window is displayed.

6. Click the **Yes** button in the *Message Confirmation* window.

   The *Bed Census* list page is displayed. The client whose admission you deleted is no longer listed. The bed now shows a status of *Open*.

Why can't I access these screens? (See page 127)

Schedule an Admission

Scheduling a client for admission means you are setting a date in the future when the client will be admitted. This task reserves the bed for that date.

To manage scheduling an admission, you can:

Schedule an Admission (See page 8)

Change the Scheduled Admission (See page 9)

Admit the Client with a Scheduled Admission (See page 13)

Cancel the Scheduled Admission (See page 10)

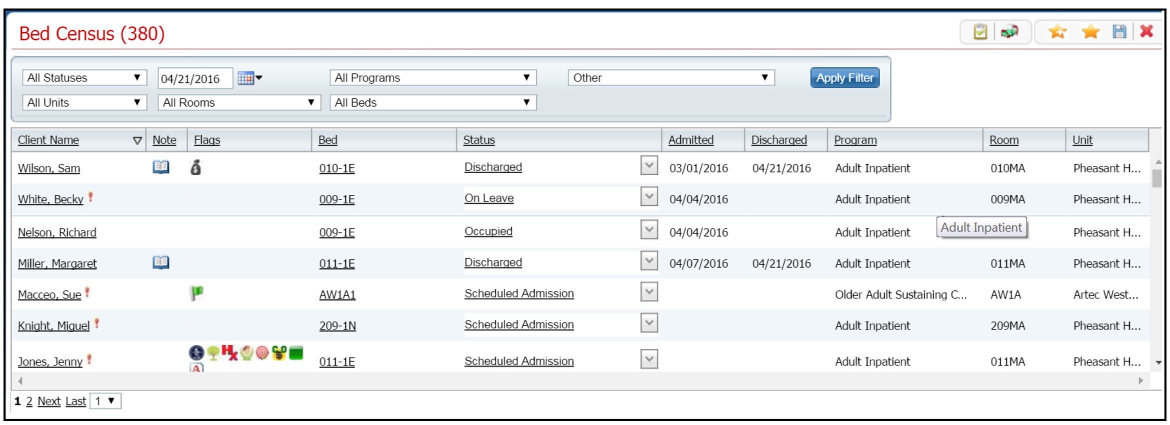
Before You Begin

The client must be entered in the system and enrolled in a program before he/she can be scheduled for admission to a bed.

To Schedule an Admission

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner**.

   The *Bed Census (###) List Page* is displayed. View field definitions.



2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

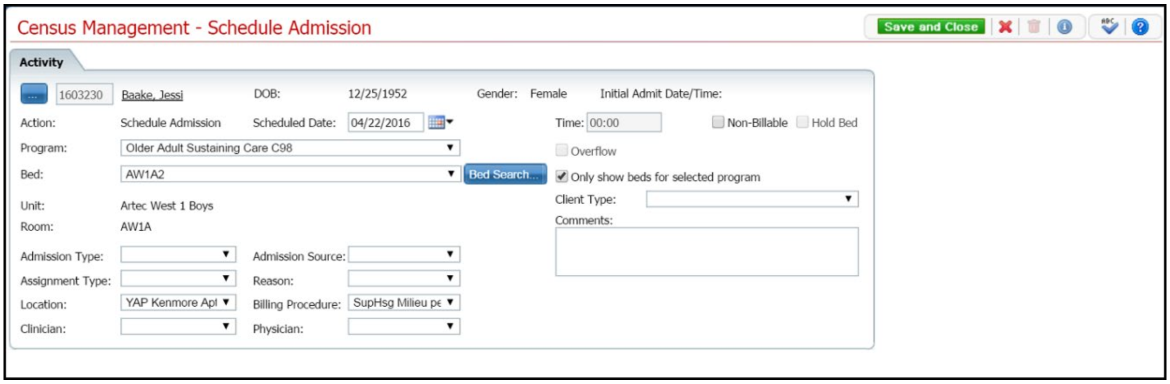
3. Find a **bed** with a status of *Open*. Tell me how... (See page 111)

4. Click the **drop down arrow** in the *Status* column of the open bed you want to admit the client to and select **Schedule Admission**.

   Why is a message window appearing?

5. Find the client you want to schedule the admission for. Tell me how... (See page 112)

   The *Census Management - Schedule Admission* page is displayed. View field definitions (See page 83).



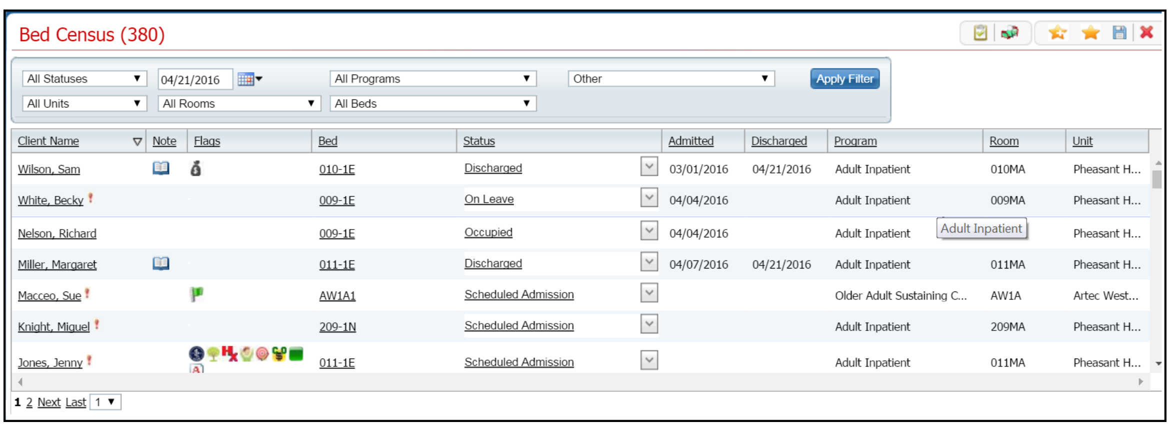
6. Complete the required and necessary fields on the *Census Management - Schedule Admission* page.

7. When the page is complete, click the **Save and Close** button in the task bar.

To Change a Scheduled Admission

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner**.

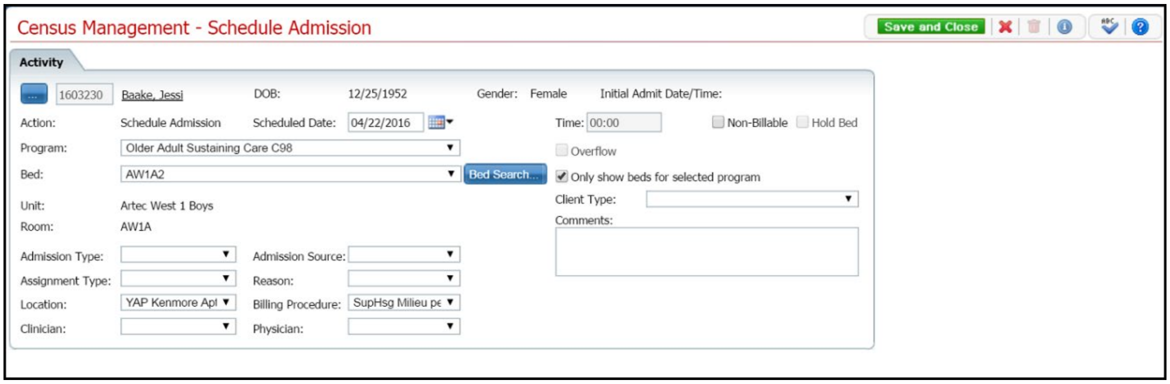
   The *Bed Census (###) List Page* is displayed. View field definitions.



2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

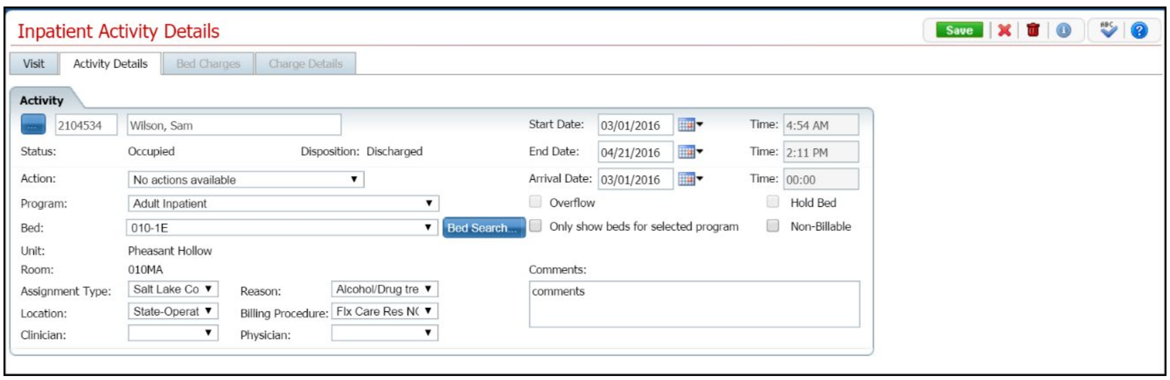
3. Find the client whose status you want to change. Tell me how... (See page 112)

   The *Census Management - Schedule Admission* page is displayed.



4. Click on the **Scheduled Admission** hyperlink in the *Status* column.

   The *Inpatient Activity Details page* is displayed with the *Activity Details* tab displayed. View [field definitions](#) (See page 109).



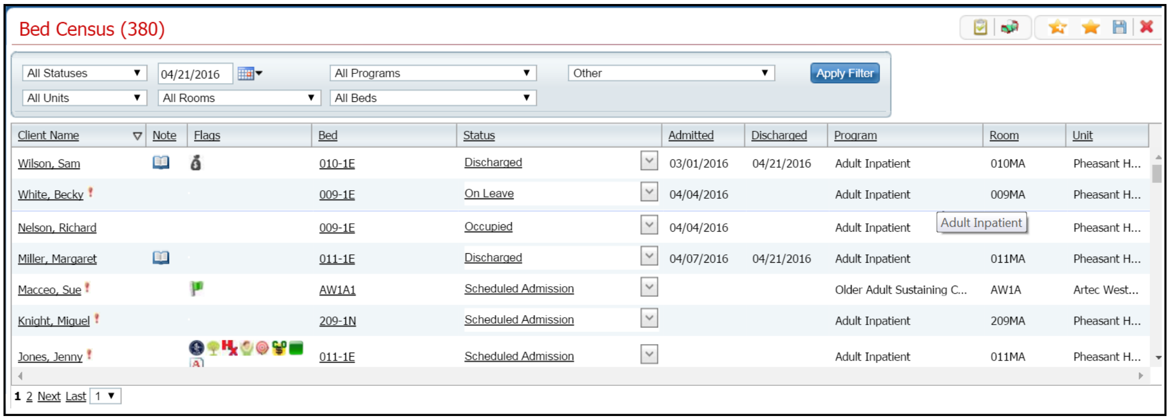
5. Make changes to any fields on the page. View [field definitions](#) (See page 109).

6. When the page is complete, click the **Save** button in the task bar.

To Cancel a Scheduled Admission

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner**

   The *Bed Census (###) List Page* is displayed. View [field definitions](#).

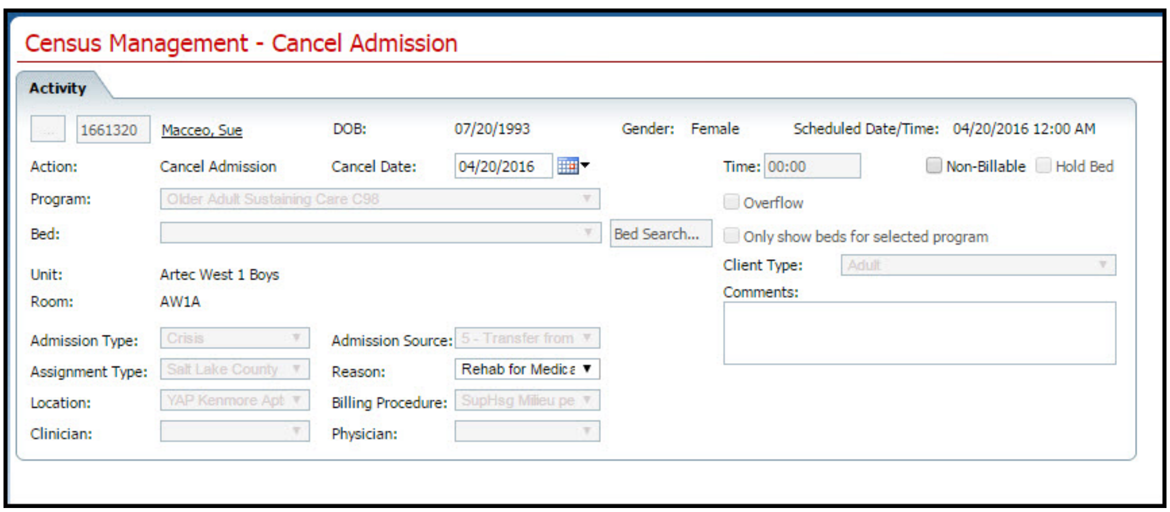


2. Filter the list to display the record you want. Tell me how...

3. Find a **bed** with a status of **Scheduled Admission.** Tell me how... (See page 111)

4. Click the **drop down arrow** in the *Status* column of the client whose status is *Schedule Admission* and select **Cancel Admission.**

The *Census Management - Cancel Admission* window is displayed. View field definitions (See page 75).



5. Verify the **accurate date** is displayed in the *Cancel Date* field. If it is not correct, change the date.

6. Select a reason for canceling the *Scheduled Admission* in the *Reason* field.

7. When the page is complete, click the **Save and Close** button in the task bar.

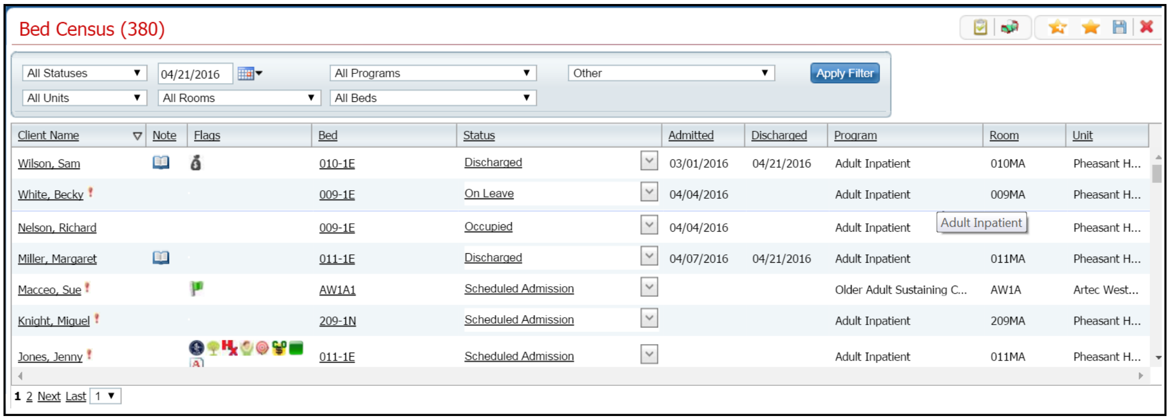
The client is removed from the *Bed Census* page and the bed is displayed as *Open* status.

Why can't I access these screens? (See page 127)

Admit a Client with a Scheduled Admission

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

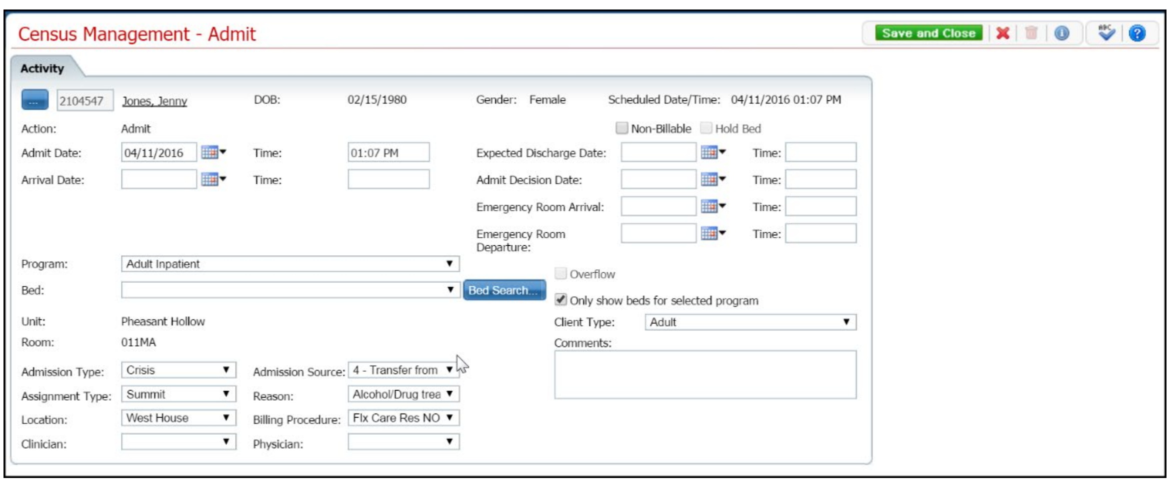
   The *Bed Census (###) List Page* is displayed. View field definitions.



2. Find the client with a scheduled admission who you want to admit. Tell me how... (See page 112)

3. On the *Bed Census* page, click on the **drop down arrow** in the *Status* column and select **Admit**.

   The *Census Management - Admit page* is displayed. View field definitions (See page 71).



4. Enter the **Arrival Date and Time**.

5. Click the **Save and Close** button in the task bar.

Why can't I access these screens? (See page 127)

Bed Change

Change a Bed Assignment

Use this task to change a client's bed assignment when the client remains in the same program. If you need to transfer the client to a new program and bed, use the Transfer a Client (See page 61) task. You can also delete a bed change that was entered. You can delete an activity until the next activity is entered.

Change a Bed Assignment (See page 14)

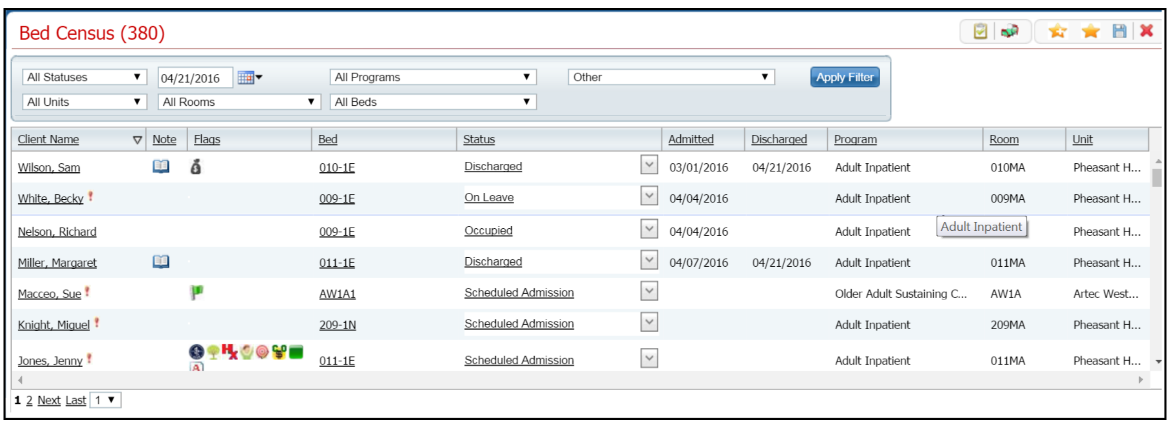
Delete a Bed Change (See page 15)

To Change a Bed Assignment

When a client is moved from one bed to another, change the bed assignment in the system.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner.**

   The *Bed Census (###) List Page* is displayed. View field definitions.

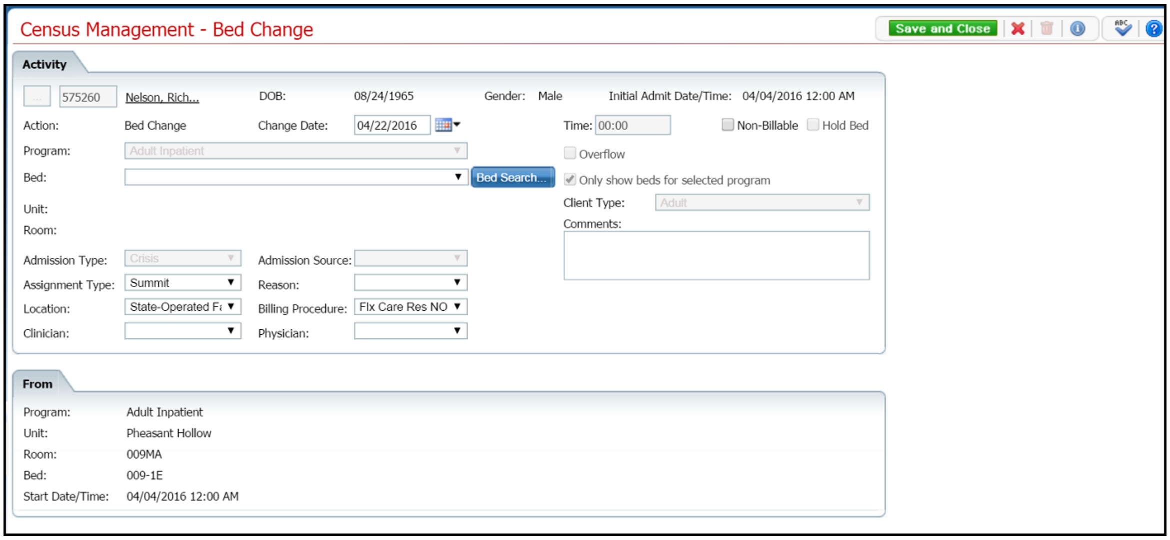


2. Filter the list to determine the records that are displayed. Tell me how.. (See page 125)

3. Click the **drop down arrow** in the *Status* column for the client who is changing beds.

4. Select **Bed Change** from the drop down list.

   The *Census Management - Bed Change* page is displayed. View field definitions (See page 73).



5. Select the **new bed** from the drop down list in the *Bed* field.

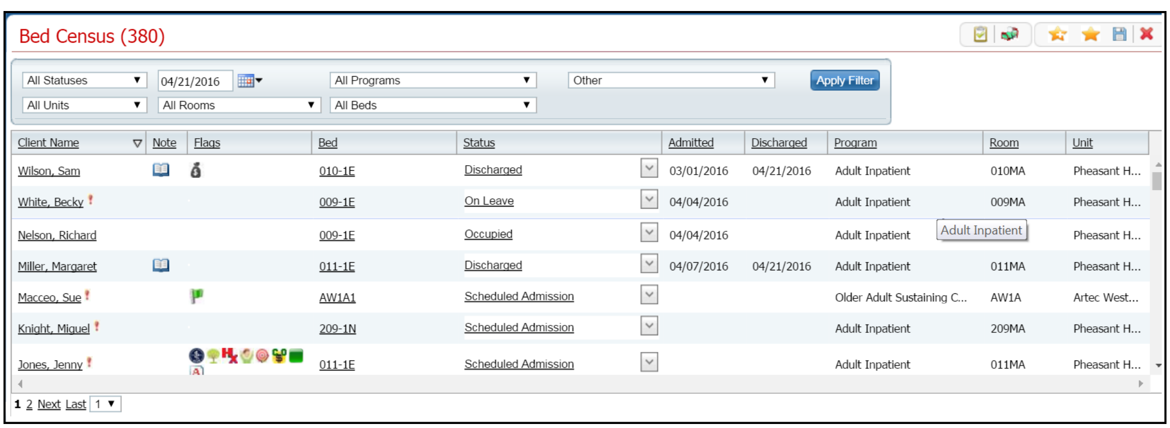
6. Click the **Save and Close** button from the task bar.

The *Bed Census* list page is displayed. Notice that the *Status* on the client's record is changed to *Bed Changed*. A second record line appears below which shows the new bed with a status of *Occupied.*

To Delete a Bed Change Assignment

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner.**

The *Bed Census (###) List Page* is displayed. View field definitions.

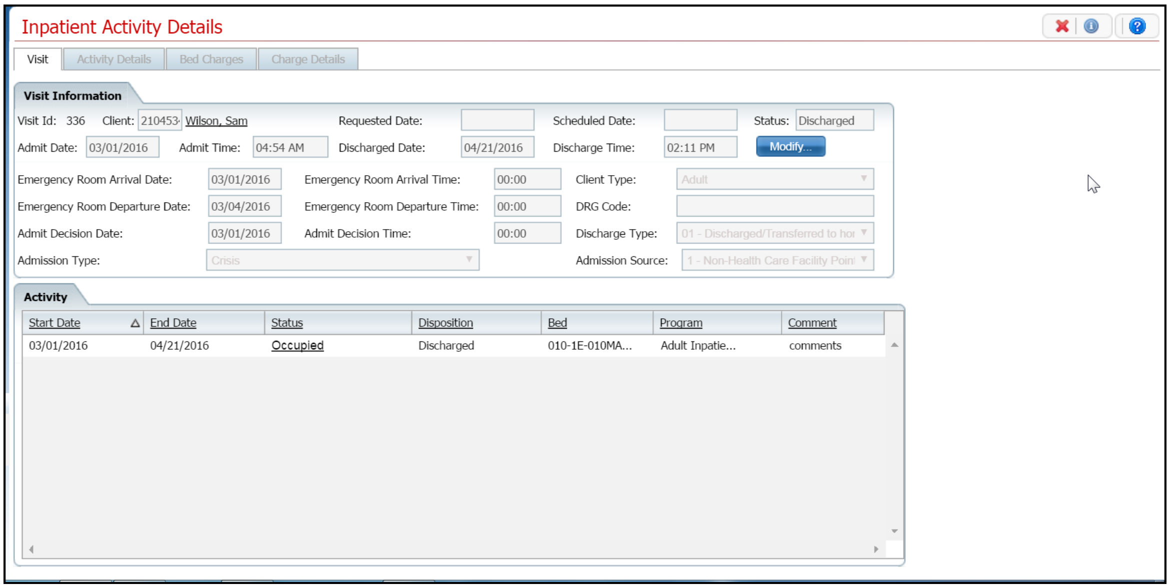


2. Filter the list to determine the records that are displayed. Tell me how.. (See page 125)

3. Find the **client** on the *Bed Census* list page with the status of *Bed Changed*. Tell me how...

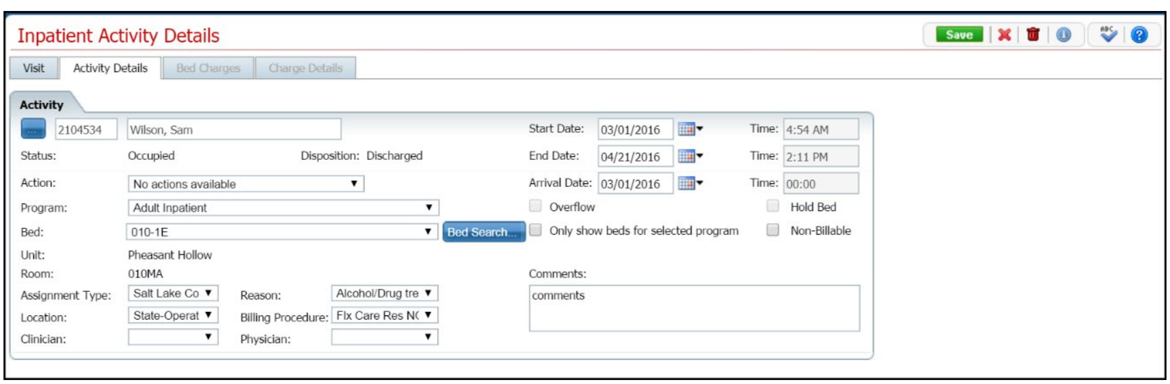
4. Click the **open book** toolbar item  in the *Note* column of the client whose bed change you want to delete.

The *Inpatient Activity Details* page is displayed with the *Visit* tab open. View field definitions (See page 105).



5. In the *Activity* section of the *Visit* tab, click on the **Occupied** hyperlink in the *Status* column where there is no entry in the *Disposition* column.

The *Inpatient Activity Details* page is displayed with the *Activity Details* tab open. View field definitions (See page 109).



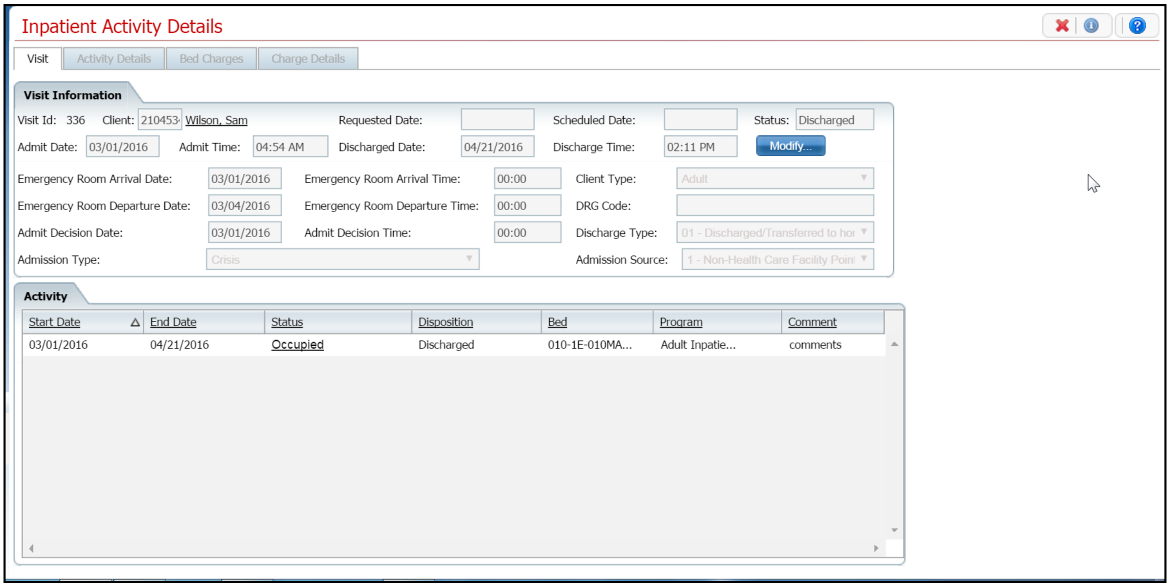
6. Verify the correct client and bed change information is displayed.

7. Click the **trash can** toolbar item  from the task bar.

The *Confirmation Message* window is displayed.

8. To continue with the deletion, click the **Yes** button in the *Confirmation Message* pop-up.

   The *Inpatient Activity Details* page is displayed with the *Visit* tab open. View field definitions (See page 105).



9. In the *Activity* section, verify that the record you removed is no longer displayed.

10. Click the **Exit** toolbar item.

    The *Bed Census* list page is displayed. Notice that the *Status* on the client's record is *Occupied* in the original bed.

Why can't I access these screens? (See page 127)

Schedule a Bed Change

You can schedule a bed change for a client to occur on a future date. You can schedule a bed change for a client who is already admitted to a bed. A scheduled bed change means you are setting a date and time in the future when the client will be moved to the different bed. You can:

Schedule a Bed Change (See page 18)

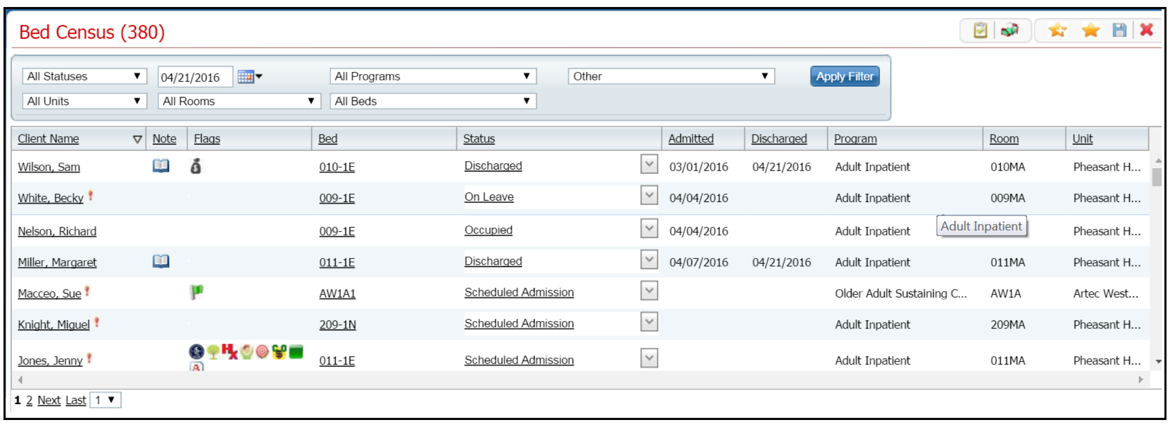
Change a Scheduled Bed Change (See page 19)

Delete a Scheduled Bed Change (See page 21)

To Schedule a Bed Change

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census (###) List Page* is displayed. View field definitions.



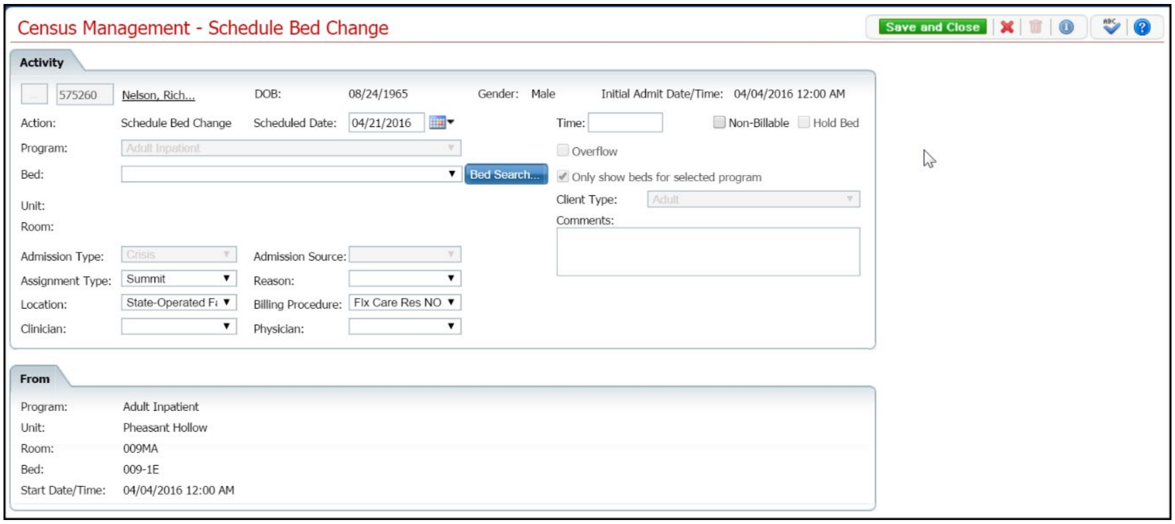
2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** on the *Bed Census* list page. Tell me how...

4. Click the **drop down arrow** in the *Status* column for the client.

5. Select **Schedule Bed Change** from the drop down list.

   The *Census Management - Schedule Bed Change* page is displayed. View field definitions (See page 85).



6. Select the **new bed** from the drop down list in the *Bed* field.

7. Click the **Save and Close** button from the task bar.

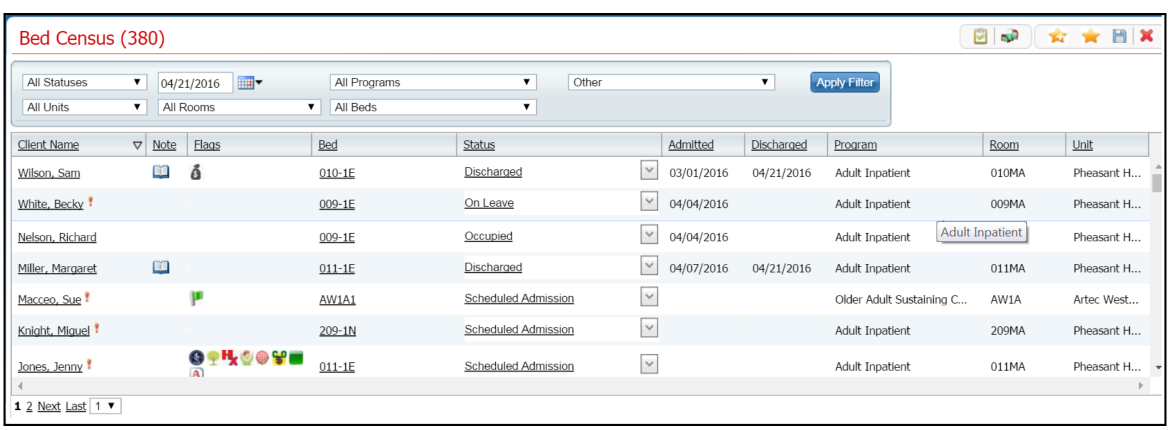
The *Bed Census* list page is displayed. Notice that the *Status* on the client's record is changed to *Scheduled Bed Change*. A new record is created with a status of *Scheduled Bed Change,* but for the scheduled date of change. To view the new status, change the filter on the *Bed Census* page to the scheduled bed change date.

To Change a Scheduled Bed Change

You can change the information on a Scheduled Bed Change until the bed change date and time.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (#####)* list page.

The *Bed Census (###) List Page* is displayed. View field definitions.

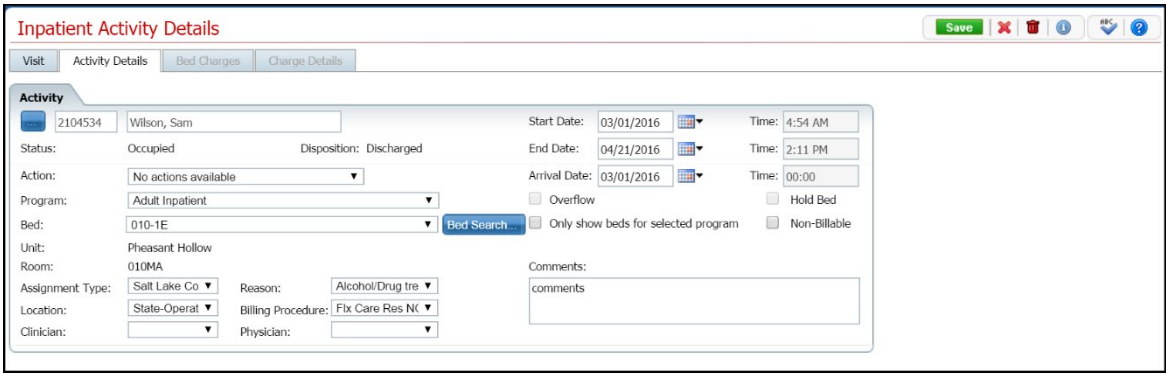


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** on the *Bed Census* list page. Tell me how...

4. Click the hyperlinked **Scheduled Bed Change** in the *Status* column for the client.

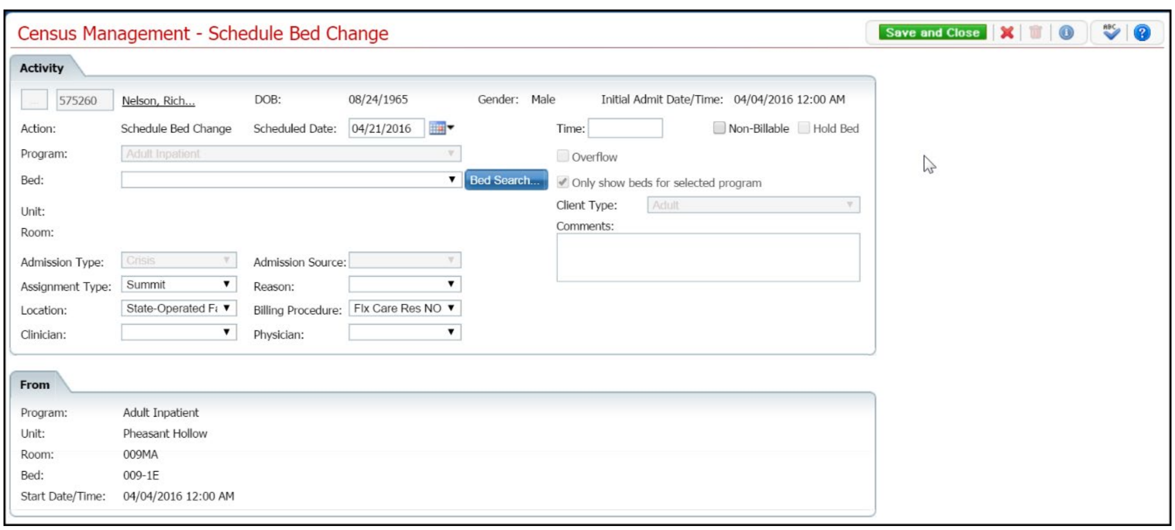
   The *Inpatient Activity Details* page is displayed with the *Activity Details* tab active.



5. Verify the correct client information is displayed.

6. Complete the changes you want to make on the *Activity* section. View field definitions (See page 109).

   The *Census Management - Schedule Bed Change* page is displayed. View field definitions (See page 85).



7. In the *Activity* section, you can:

   - Change the Start Date - Click on the **Calendar** toolbar item next to the *Start Date* field and choose a new date.
   - Choose a new Action - Click the drop down arrow in the *Action* field and select an option:
     - Bed Change (See page 14)
     - Schedule Transfer (See page 58)

- o Schedule On Leave (See page 52)

- Select a new Bed - Click the drop down arrow in the Bed field and select the bed.
- Add a Comment - Type a comment in the *Comments* field.

8. Click the **Save** button from the task bar.

9. Click the **Exit** toolbar item  from the task bar.

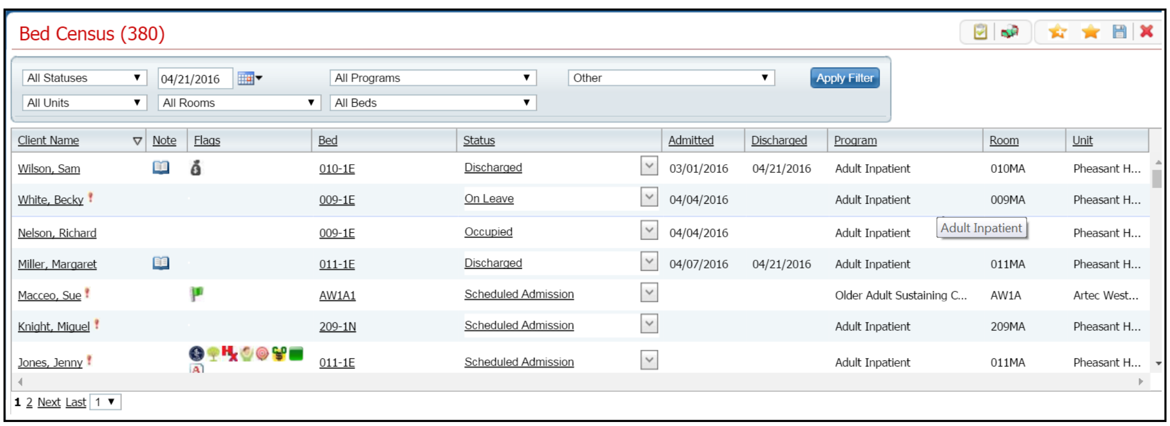
   The *Bed Census* list page is displayed. Notice that the *Status* on the client's record is changed to *Bed Changed*. A new record is created with a status of *Scheduled Bed Change,* but for the scheduled date of change. To view the new status, change the filter on the *Bed Census* page to the new scheduled bed change date.

Delete a Scheduled Bed Change

You can delete a Scheduled Bed Change the scheduled bed change date.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census (###) List Page* is displayed. View field definitions.

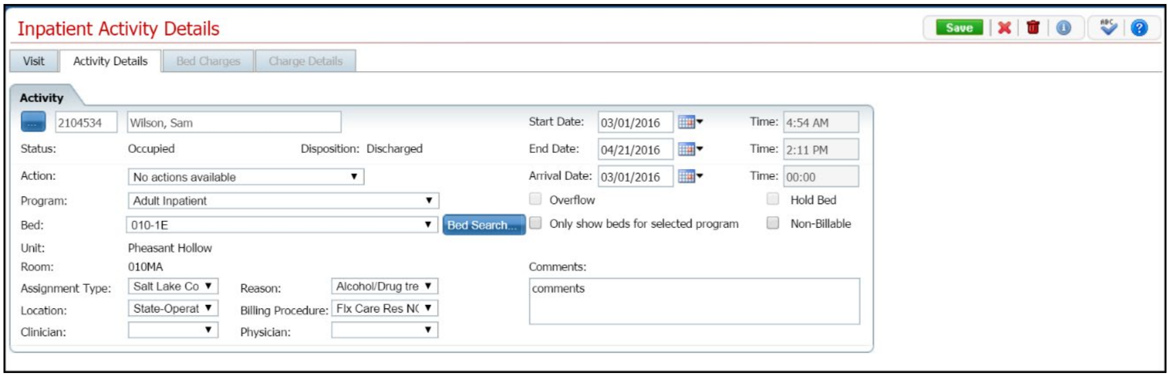


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** on the *Bed Census* list page. Tell me how...

4. Click the hyperlinked **Scheduled Bed Change** in the *Status* column for the client.

   The *Inpatient Activity Details* page is displayed with the *Activity Details* tab action. View field definitions (See page 109).



5. Verify the correct client information is displayed.

6. Click the **trash can** toolbar item  in the tool bar.

   The *Confirmation Message* window is displayed.

7. To continue with the deletion, click the **Yes** button in the *Confirmation Message* pop-up window.

   The *Inpatient Activity Details* page is displayed with the *Visit* tab active for the current client. View field definitions (See page 105).

8. Click the **Exit** toolbar item  from the task bar.

   The *Bed Census* list page is displayed. The client is listed as *Occupied* in the original bed.

Why can't I access these screens? (See page 127)

Discharge

Schedule a Discharge

You can schedule a discharge for a client who is admitted to a bed. Scheduling a discharge lets you set a date and time in the future. When that date and time arrive, the activity on the client's account is changed to a discharge procedure.

You can:

Schedule a Discharge (See page 23)

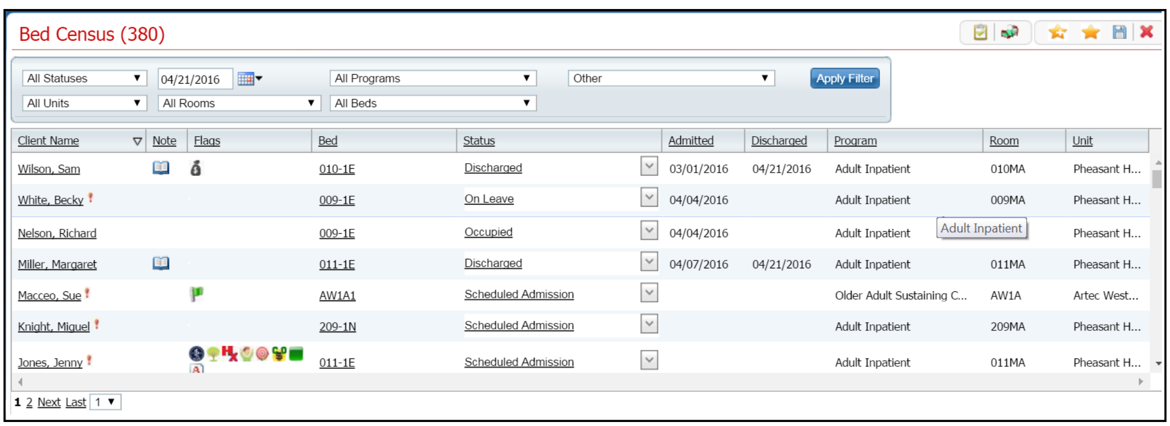
Change a Scheduled Discharge (See page 24)

Delete a Scheduled Discharge (See page 26)

To Schedule a Discharge

1. Display the *Bed Census* list page. Tell me how...

   The *Bed Census (###) List Page* is displayed. View field definitions.



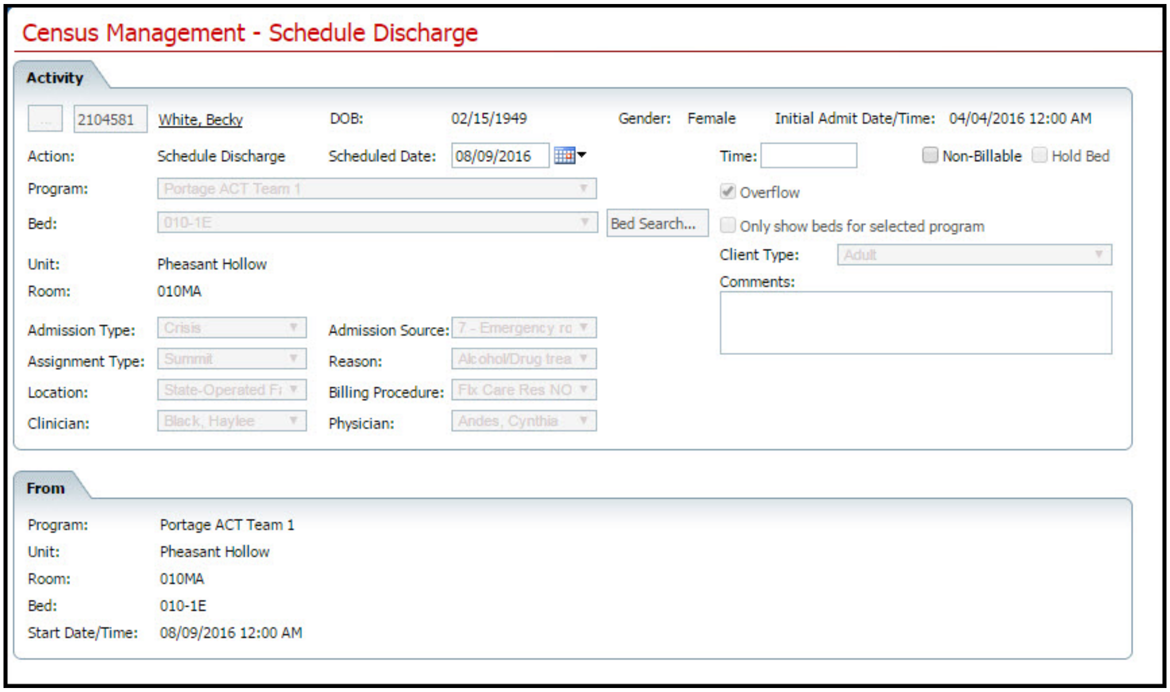
2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** you want to schedule the discharge for. Tell me how... (See page 112)

   Note: You can only schedule a discharge for a patient with a status of *Occupied*.

4. Click the **drop down arrow** in the *Status* column of the client you want to schedule the discharge for and select **Schedule Discharge**.

   The *Census Management - Schedule Discharge* page is displayed. View field definitions.



5. Complete the **required and necessary fields** on the *Census Management - Schedule Discharge* page.

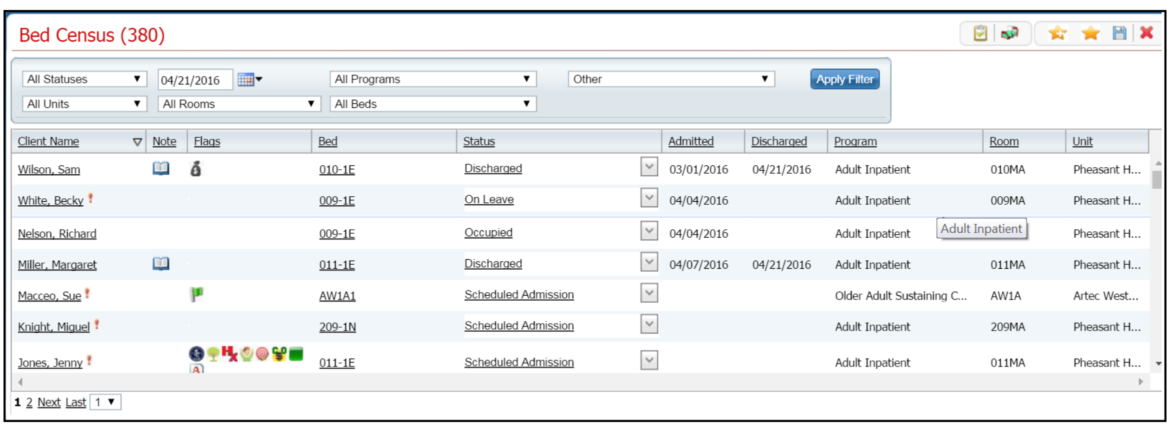
6. When the page is complete, click the **Save and Close** button in the task bar.

To Change a Scheduled Discharge

When you have scheduled a discharge for a client, you can make changes for the scheduled discharge date and time.

1. Display the *Bed Census* list page. Tell me how...

   The *Bed Census* list page is displayed. View field definitions (See page 69).

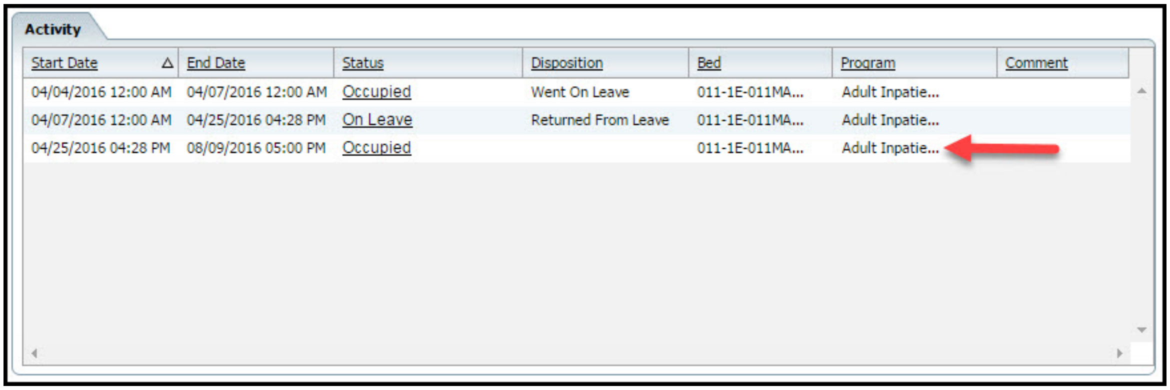


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** whose scheduled discharge you want to change. Tell me how... (See page 112)

4. Click the **open book icon** in the unnamed column for the client whose scheduled discharge you want to change.

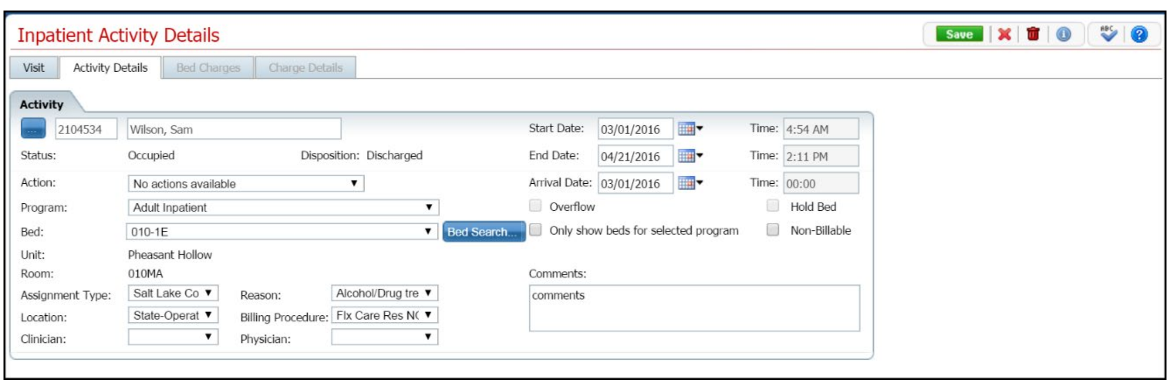
   The *Inpatient Activity Details* page is displayed with the *Visit* tab active. View field definitions (See page 105).



5. Find the entry in the *Activity* section that represents the *Scheduled Discharge*. Look for a record with an *End Date* and *Time* in the future. Notice the red arrow in the figure above pointing to a scheduled discharge entry.

6. On the scheduled discharge line, click on the **hyperlinked status** in the *Status* column.

   The *Inpatient Activity Details* page with the *Activity Details* tab active is displayed. View field definitions (See page 109).



7. You can change the *End Date* field.

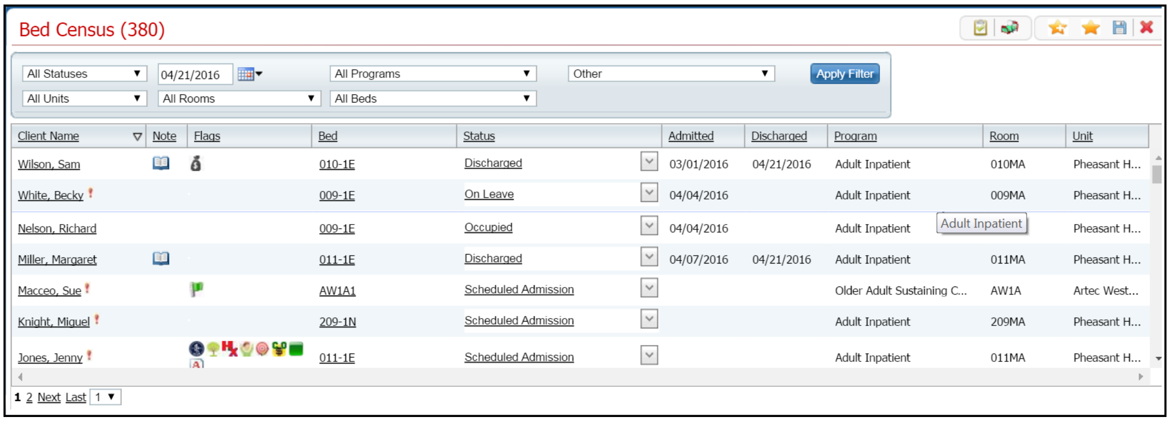
8. When the page is complete, click the **Save and Close** button in the task bar.

To Delete a Scheduled Discharge

When you have scheduled a discharge for a client, you can delete the scheduled discharge date and time. After the scheduled discharge date and time have passed, you cannot delete the record for the schedule discharge.

1. Display the *Bed Census* list page. Tell me how...

   The *Bed Census* list page is displayed. View field definitions (See page 69).

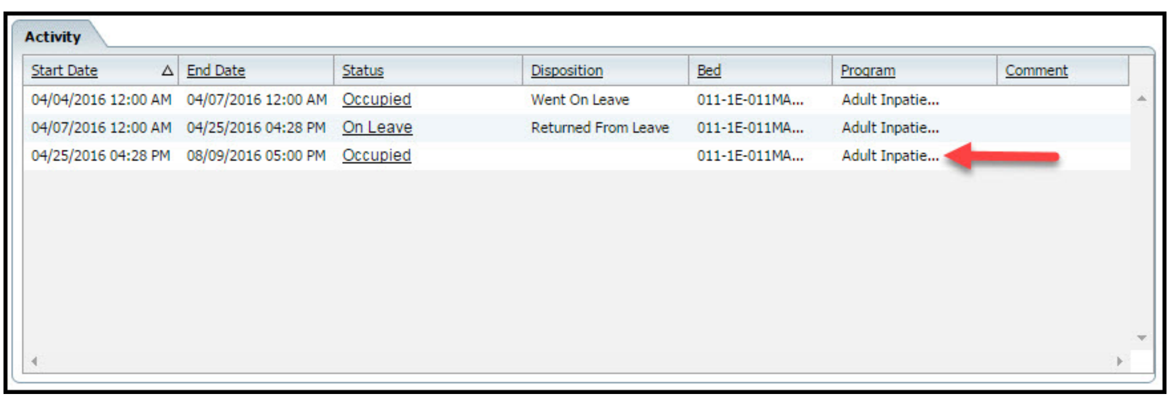


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** whose scheduled discharge you want to change. Tell me how... (See page 112)

4. Click the **open book icon** in the unnamed column for the client whose scheduled discharge you want to change.

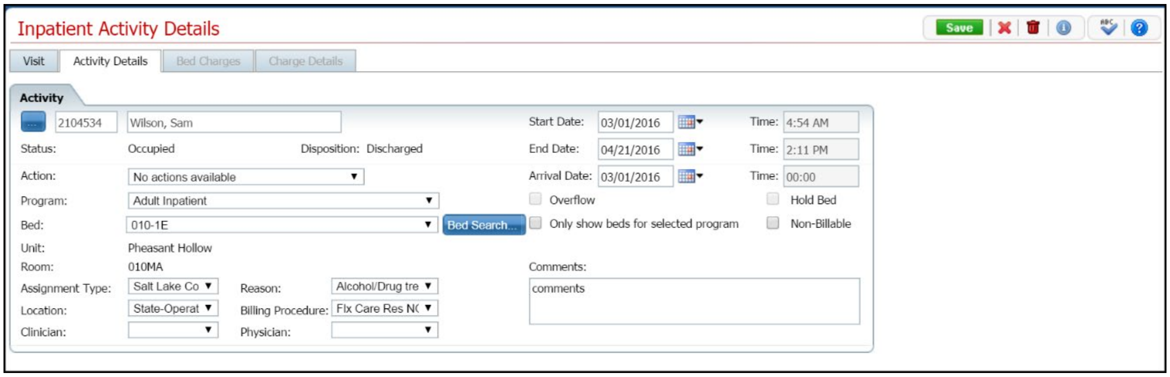
   The *Inpatient Activity Details* page is displayed with the *Visit* tab active. View field definitions (See page 105).



5. Find the entry in the *Activity* section that represents the *Scheduled Discharge*. Look for a record with an *End Date* and *Time* in the future. Notice the red arrow in the figure above pointing to a scheduled discharge entry.

6. On the scheduled discharge line, click on the **hyperlinked status** in the *Status* column.

   The *Inpatient Activity Details* page with the *Activity Details* tab active is displayed. View field definitions (See page 109).



7. Click the **trash can**  toolbar item.

   The *Confirmation Message* window is displayed.

8. Click the **Yes** button in the *Confirmation Message* window.

9. When the page is complete, click the **Save and Close** button in the task bar.

Why can't I access these screens? (See page **Error! Bookmark not defined.**)

Discharge a Client

You discharge a client by changing the status of their occupancy to *Discharged.*

You can:

Discharge a Client

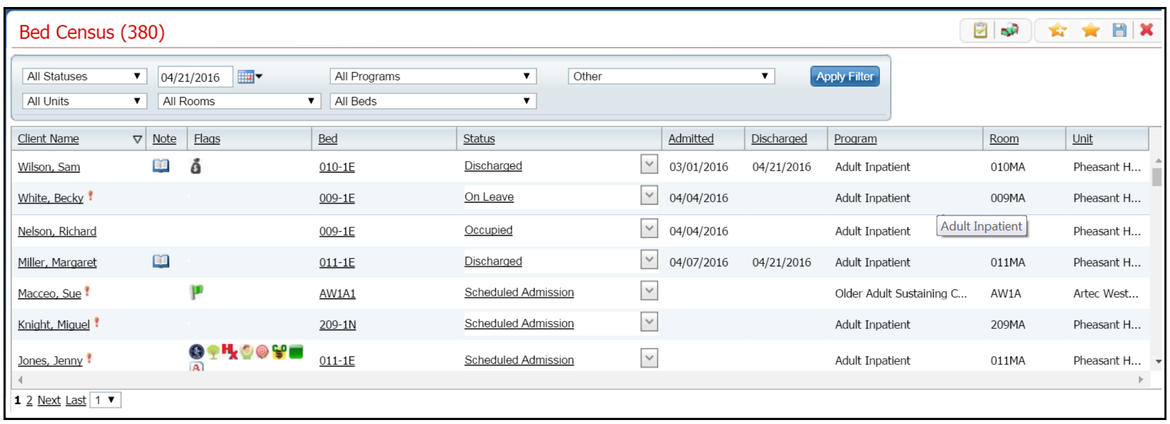
Change a Discharge on a Client

Delete a Discharge for a Client

To Discharge a Client

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).



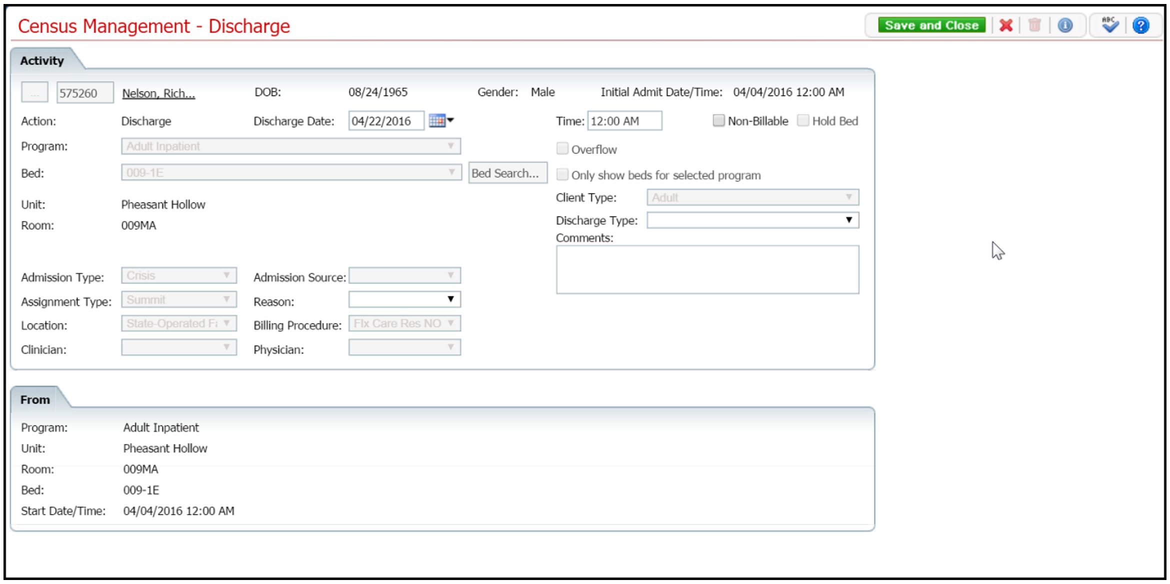
2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** you want to discharge. Tell me how... (See page 112)

   Note: You can only discharge a patient with a status of *Occupied* or *On Leave*.

4. Click the drop down arrow in the *Status* column of the client you want to discharge and select **Discharge**.

   The *Census Management - Discharge* page is displayed. View field definitions.



5. Complete the **required and necessary** fields on the *Census Management - Discharge* page. Be sure to select the *Discharge Type*.

6. When the page is complete, click the **Save and Close** button in the task bar.

The *Bed Census* list page is displayed. The client's record now lists a status of *Discharged.* An open book toolbar item  is displayed in the *Note column.*

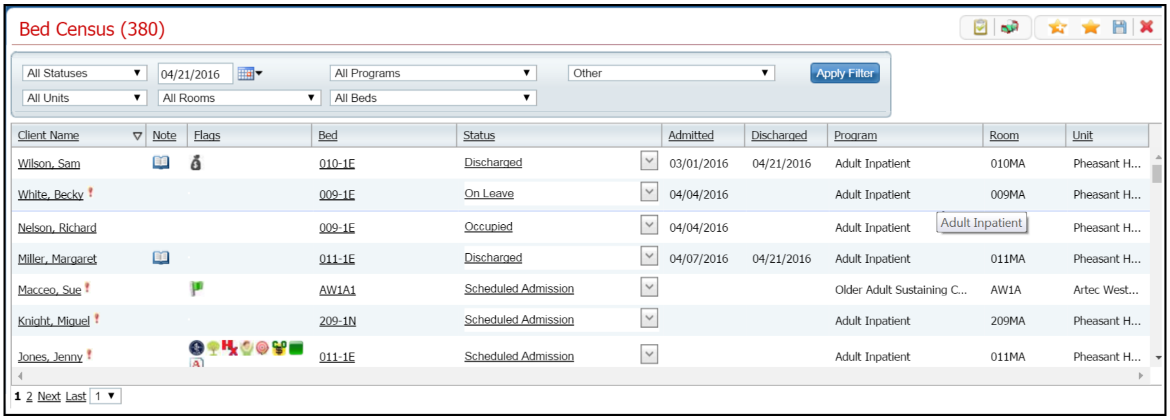
To Change the Information on a Discharge

If you have entered information on a discharge incorrectly, you can change the information. You can change any of these fields:

- Start Date
- End Date
- Program
- Bed
- Assignment Type
- Reason
- Location
- Billing Procedure
- Clinician
- Physician

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (#####)* list page.

The *Bed Census* list page is displayed. View field definitions (See page 69).

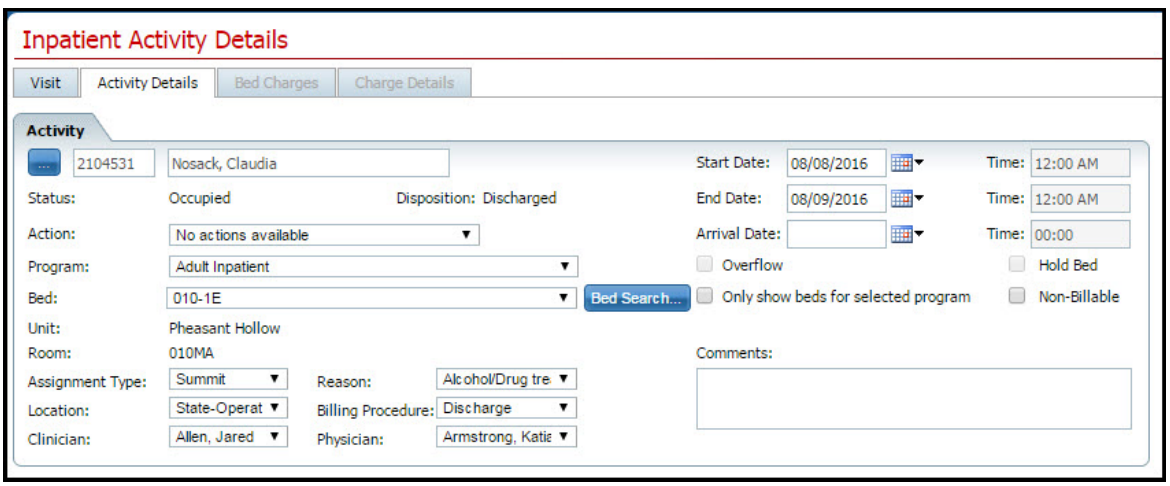


2. Filter the list to determine the records that are displayed. [Tell me how...](#) (See page 125)

3. Find the **client** whose discharge you need to change. [Tell me how...](#) (See page 112)

4. Click the hyperlinked status in the *Status* column. The status should say Discharged.

The *Inpatient Activity Details* page is displayed with the Activity Details tab active. View [field definitions](#) (See page 109).



Notice that the *Disposition* is set to *Discharged*.

5. Complete the **required and necessary** fields on the *Census Management - Discharge* page. You can change any of the fields that are listed at the beginning of this task.

6. When the page is complete, click the **Save** button in the task bar.

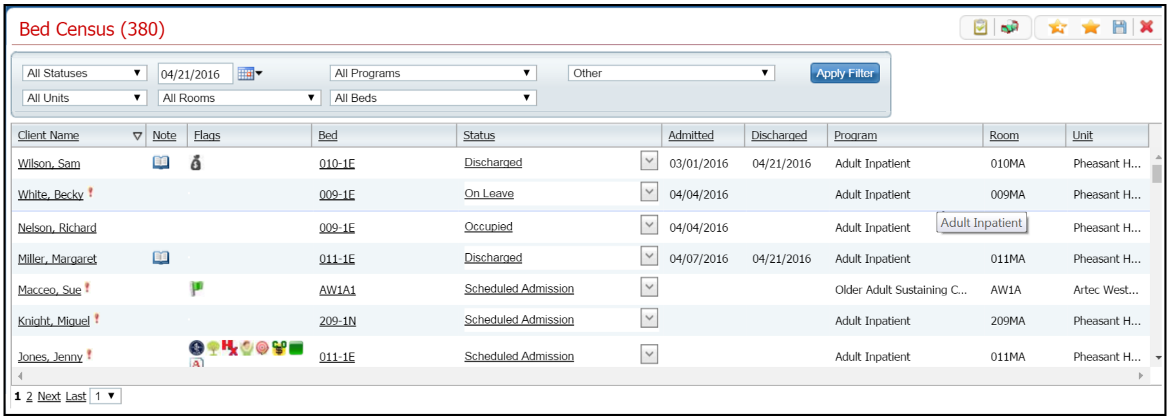
The *Bed Census* list page is displayed. The client's record now lists a status of *Discharged.* An open book toolbar item  is displayed in the *Note column.*

To Delete a Discharge Action

Note: Take care when deleting data, especially if it has been used on services and billing charges in the system. Deleting existing data can cause problems with the existing records and history.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).

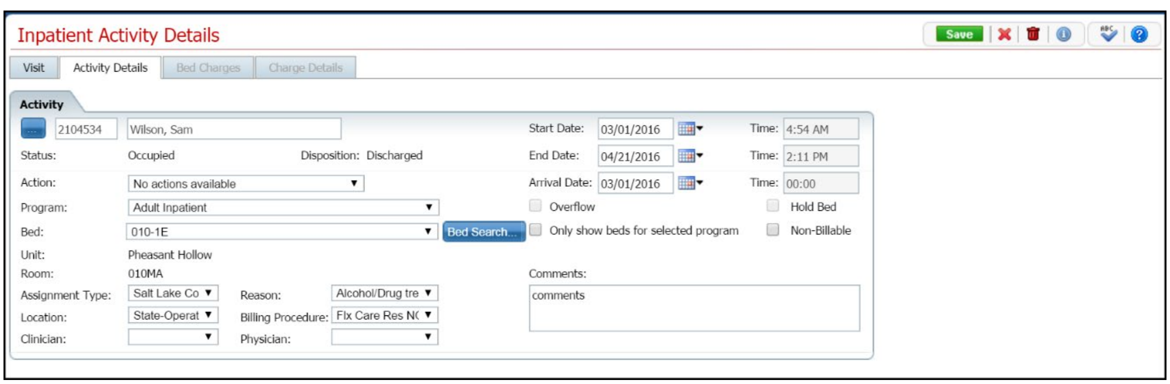


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** whose discharge you want to delete. Tell me how... (See page 112)

4. Click the hyperlinked **Discharged** status in the *Status* column of the client whose discharge you want to delete.

   The *Inpatient Activity Details* page is displayed with the *Activity Details* tab displayed. View field definitions (See page 109).



5. Verify the correct client, status and disposition are displayed.

6. Click the **trash can** toolbar item  in the toolbar.

The *Confirmation Message* window is displayed.

7. Click the **Yes** button in the *Confirmation Message* pop-up window.

   The *Inpatient Activity Details* page is displayed with the *Visit* tab active. View field definition (See page 105)s.

8. Notice in the *Activity* section, the line with the status of *Discharged* no longer appears.

9. To exit the page, click the **Exit** toolbar item  in the task bar.

   The *Bed Census* list page is displayed. The client's record now lists a status of *Occupied.* The line with a status of *Discharged* is no longer displayed.

Why can't I access these screens? (See page 127)

Discharge a Client while On Leave

If a client is on leave and does not return to the facility, or indicates they are leaving the program, discharge the client.

You can:

Discharge a Client while On Leave (See page 33)

Change a Discharge while On Leave Record (See page 34)

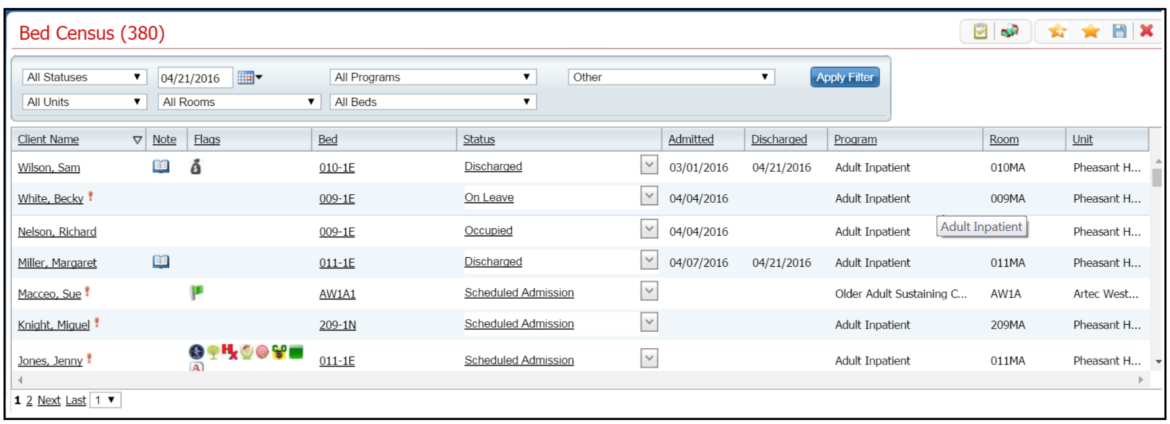
Delete a Discharge Completed when a Client Is On Leave (See page 35)

To Discharge a Client while On Leave

Use this procedure to discharge a client while on leave.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).

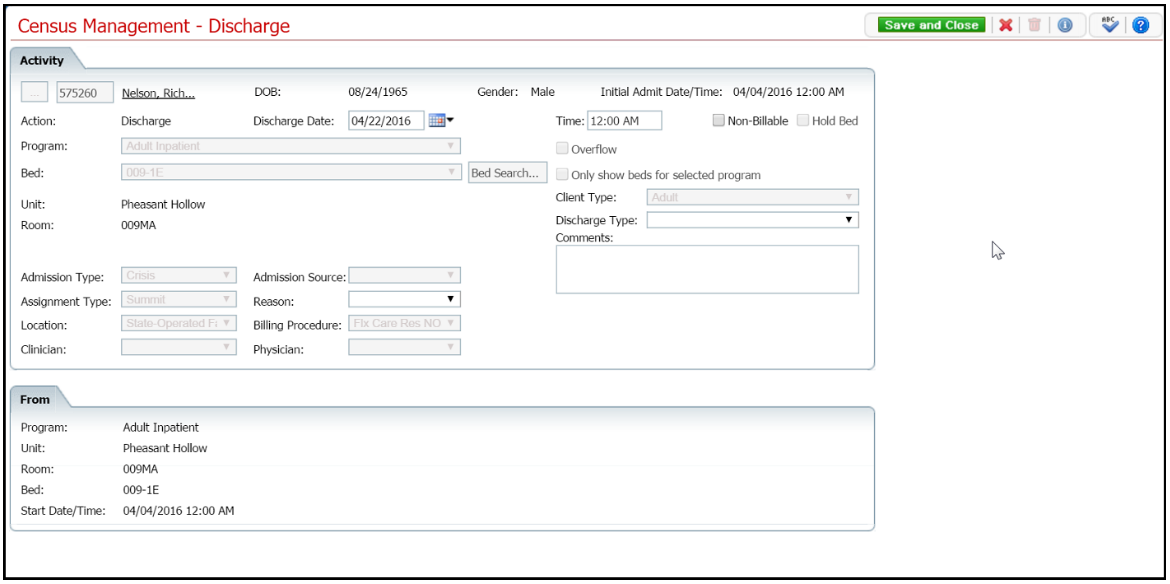


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** who is on leave that you want to discharge. Tell me how... (See page 112) You can only discharge a patient with a status of *Occupied* or *On Leave*.

4. Click the **drop down arrow** in the *Status* column of the client you want to discharge and select **Discharge**.

   The *Census Management - Discharge* page is displayed. View field definitions.



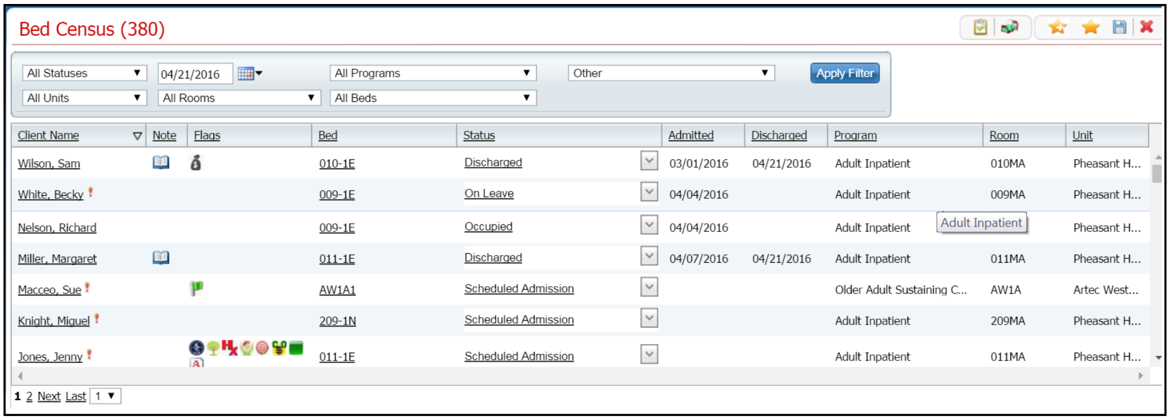
5. Complete the **required and necessary fields** on the *Census Management - Discharge* page. You can enter:
   - The Discharge Date.
   - The Discharge Time.
   - The Discharge Type.
   - The Reason.
6. When the page is complete, click the **Save and Close** button in the toolbar.

Change a Discharge while On Leave Record

If you need to make changes on the information entered for a discharge, use this task.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (#####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).

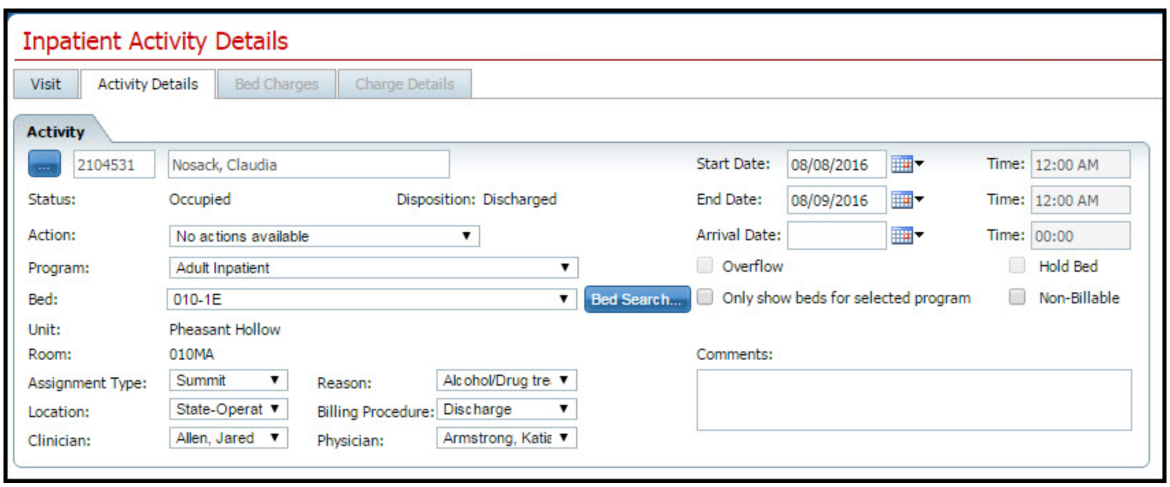


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** who is on leave that you want to discharge. Tell me how... (See page 112)

4. Click the **hyperlinked status** in the *Status* column of the client whose discharge you want to change.

The *Inpatient Activity Details* page is displayed with the *Activity Details* tab open. View field definitions (See page 109).



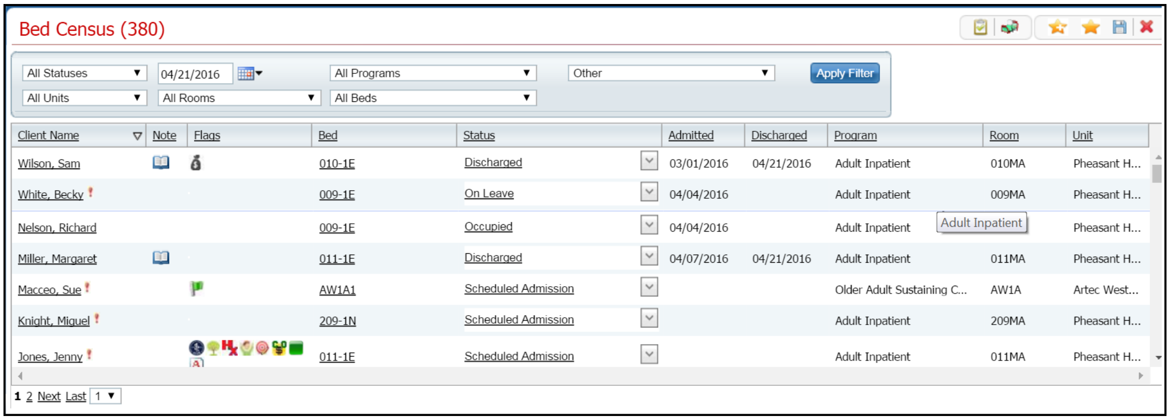
5. Change **any fields** on the *Inpatient Activity Details* page *Activity Details* tab.
6. When the page is complete, click the **Save and Close** button in the toolbar.

Delete a Discharge Completed when a Client Is On Leave

While you can delete a discharge of a client on leave, you must be careful about deleting actions that have been in the system for a while as they have been involved in processes, charges and claims. Changing some portion of an activity at a later time can cause problems in the system and on the client's account.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

The *Bed Census* list page is displayed. View field definitions (See page 69).

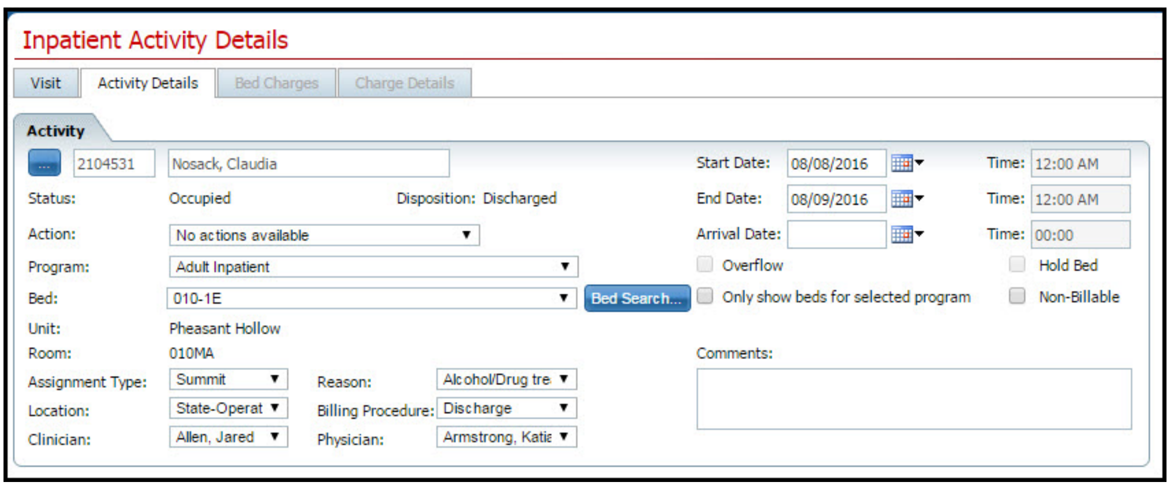


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** who is discharged that you want to delete the discharge. Tell me how... (See page 112)

4. Click the **hyperlinked status** in the *Status* column of the client whose discharge you want to change.

The *Inpatient Activity Details* page is displayed with the *Activity Details* tab open. View field definitions (See page 109).

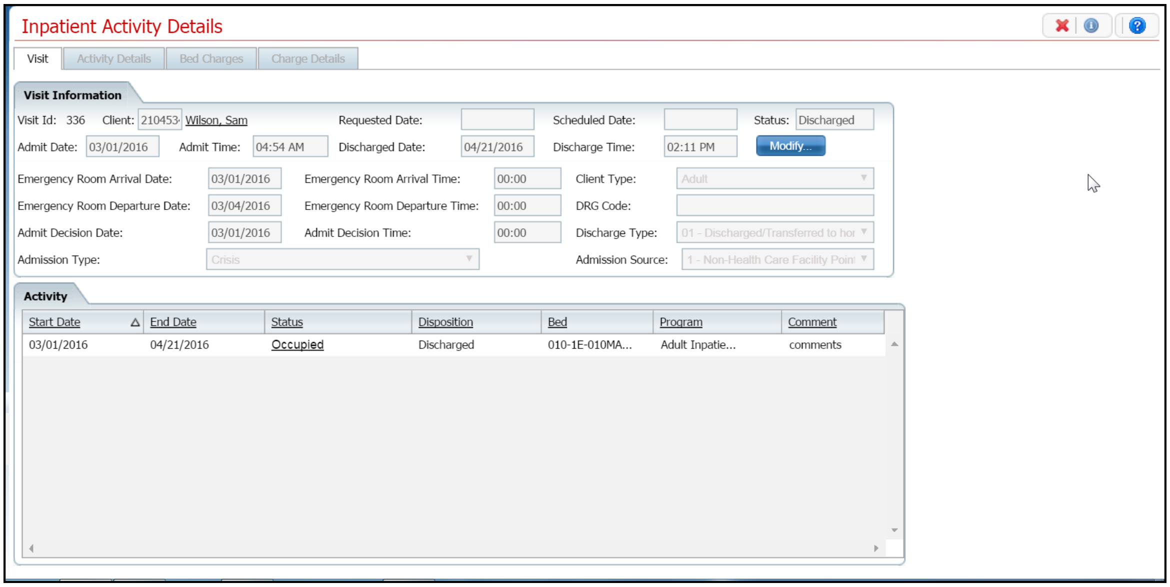


5. Click the **trash can** toolbar item to delete the discharge.

The *Confirmation Message* window is displayed.

6. Click the **Yes** button in the *Confirmation Message* window.

The *Inpatient Activity Details* page is displayed with the *Visit* tab active. View field definitions (See page 105).



Notice that the *Discharge* activity is removed from the *Activity* section and the status of the client is returned to *On Leave*.

Why can't I access these screens? (See page 127)

Leave

Return a Client from Leave

When a client returns from leave, change the status for the client in *Bed Census to Return from Leave. Return from Leave* places the client back in the bed he/she occupied before leave, unless you change the bed. You must return the client from leave to include him/her for *Bed Attendance. On Leave* means the client's status is still admitted, but they are away from the facility with permission.

Use these procedures to manage a client's return from *On Leave* setting:

Return a Client from Leave (See page 38)

Delete a Client's Return From Leave (See page 39)

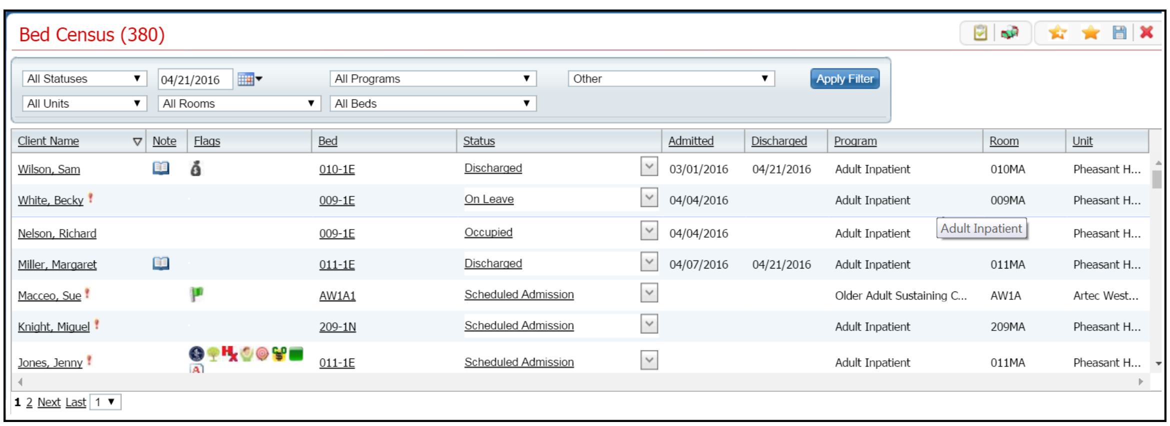
Before You Begin

The client's status must be *On Leave* to set a status of *Return from Leave.*

To Return a Client from Leave

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).

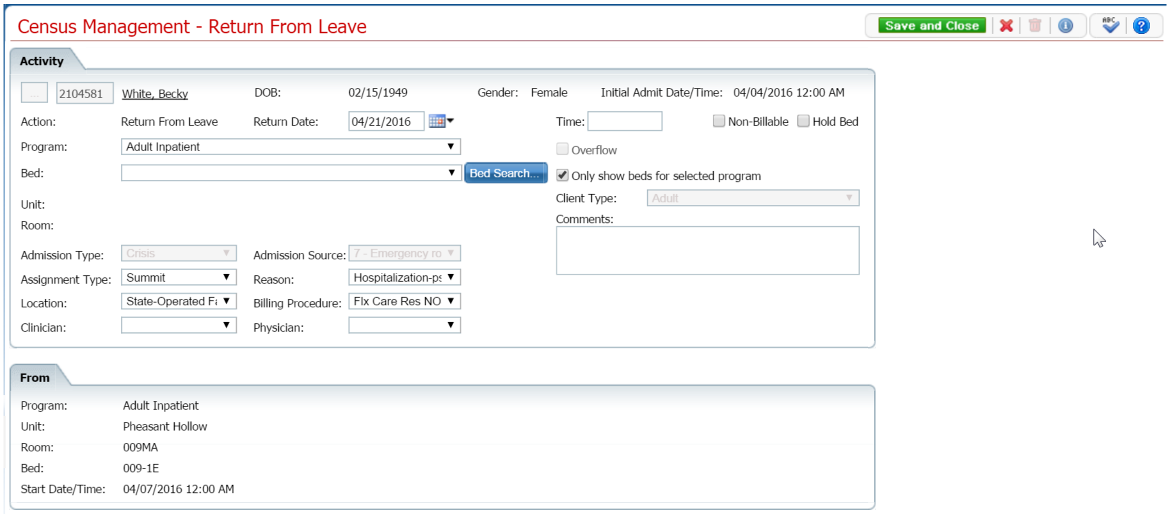


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the client who you want to return from leave. Tell me how... (See page 112)

4. Click the **drop down arrow** in the *Status* column of the client you want to return from leave and select **Return from Leave**.

The *Census Management - Return From Leave* page is displayed. View field definitions (See page 81).



5. Complete the required and necessary fields on the *Census Management - Return From Leave* page.

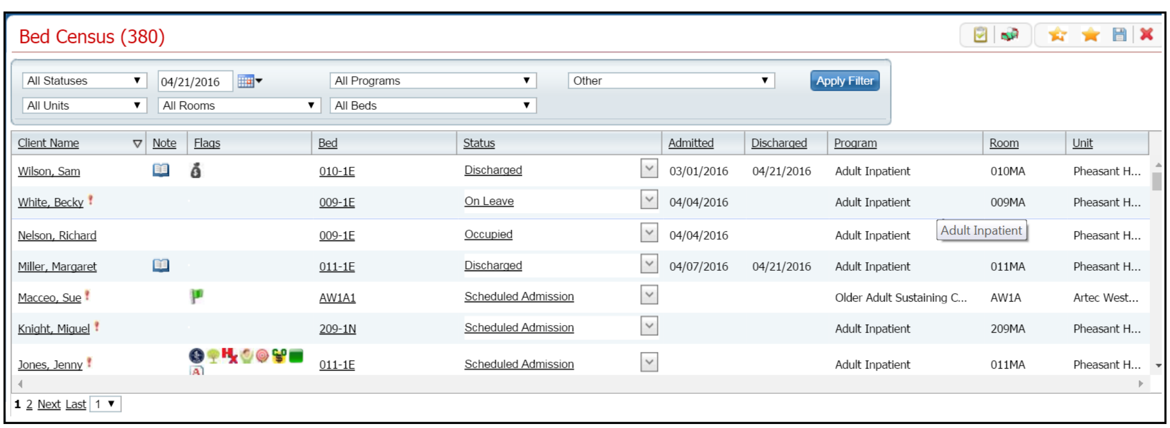
6. When the page is complete, click the **Save and Close** button in the toolbar.

To Delete a Client's Return From Leave Setting

If you have put a client as *Return From Leave* in error, you can delete the *Return From Leave* status.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).

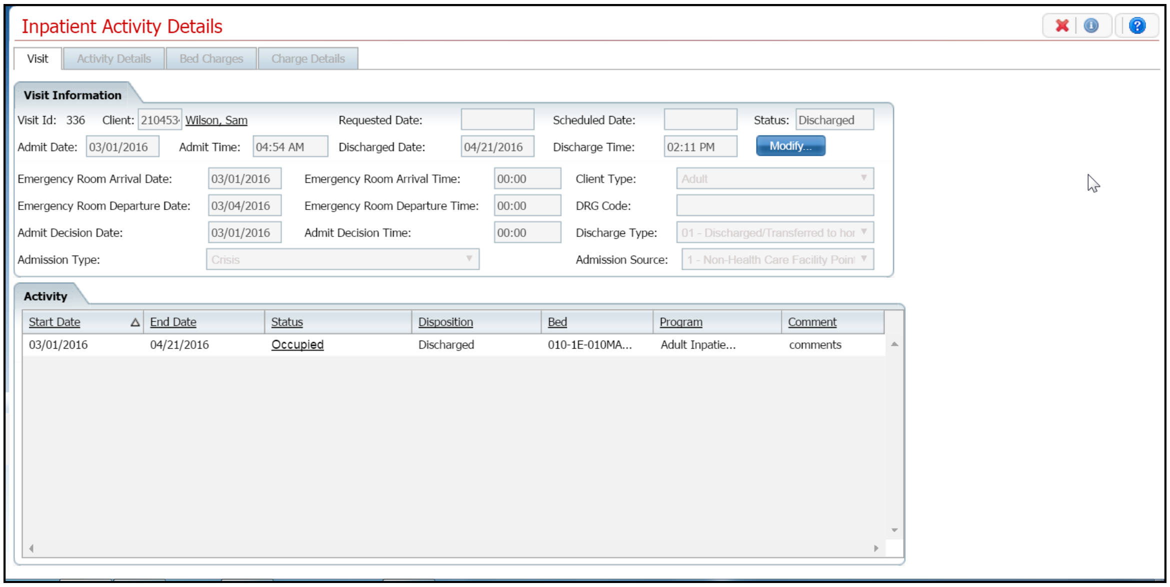


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the client whose return from leave setting you want to change. Tell me how... (See page 112)

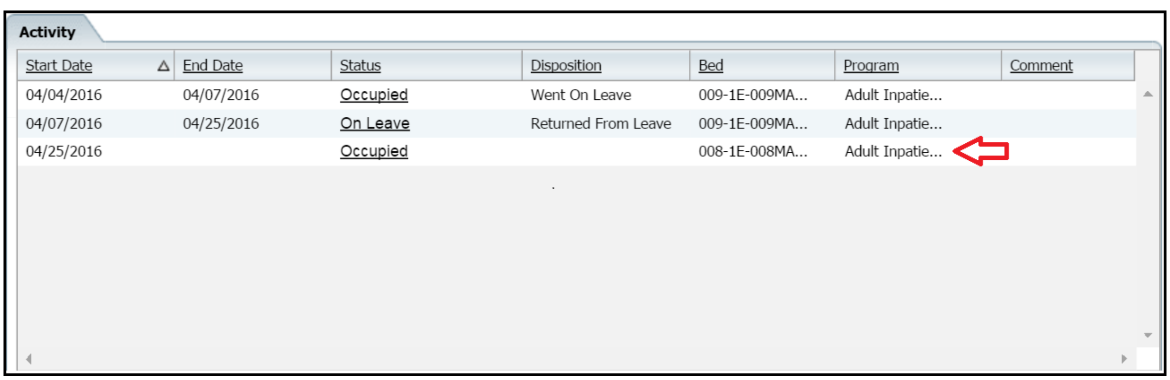
4. Click the **open book**  toolbar item in the *Note* column on the client's record.

The *Inpatient Activity Details* page is displayed with the *Visit* tab active. View field definitions (See page 105).



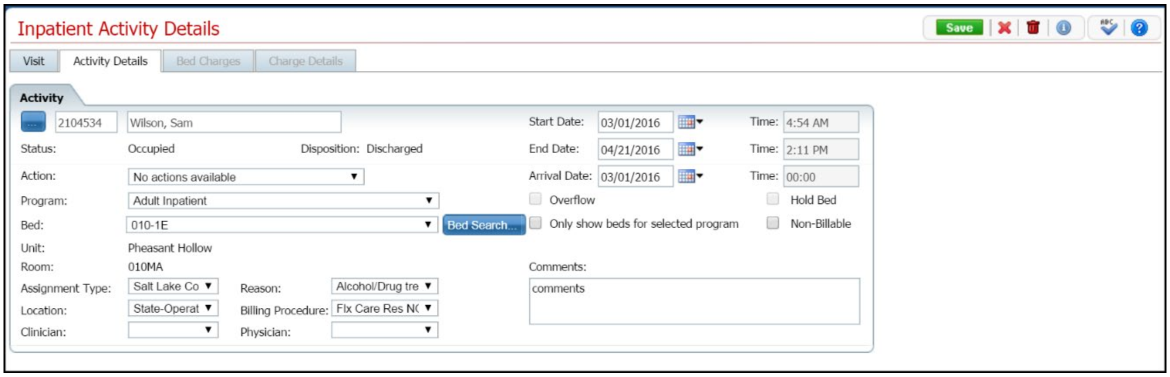
5. Make sure the **Visit** tab is active.

6. In the *Activity* section, find the record with the *Status* of *Occupied* just below the record with a *Status* of *On Leave*. Refer to the red arrow in the figure below.



7. Click on the **Occupied** status hyperlink.

The *Inpatient Activity Details* page is displayed with the *Activity Details* tab active. View field definitions (See page 109).



8. Click the **trash can** toolbar item in the toolbar.

   The *Confirmation Message* window is displayed.

9. In the *Confirmation Message* window, click the **Yes** button.

   The *Inpatient Activity Details* page is displayed with the *Visit* tab active. View field definitions (See page 105).

11. Click the **Exit** toolbar item to close the page.

    The *Bed Census* page is displayed. The client's status is displayed as *On Leave*. The record with the *Status* of *Returned From Leave* is no longer displayed.

Why can't I access these screens? (See page 127)

Set a Client On Leave

On Leave means the client's status is still admitted, but they are away from the facility with permission.

Use these procedures to manage a client's on leave setting.

Set a Client On Leave (See page 42)

Change a Client's On Leave Setting (See page 43)

Delete a Client's On Leave (See page 45)

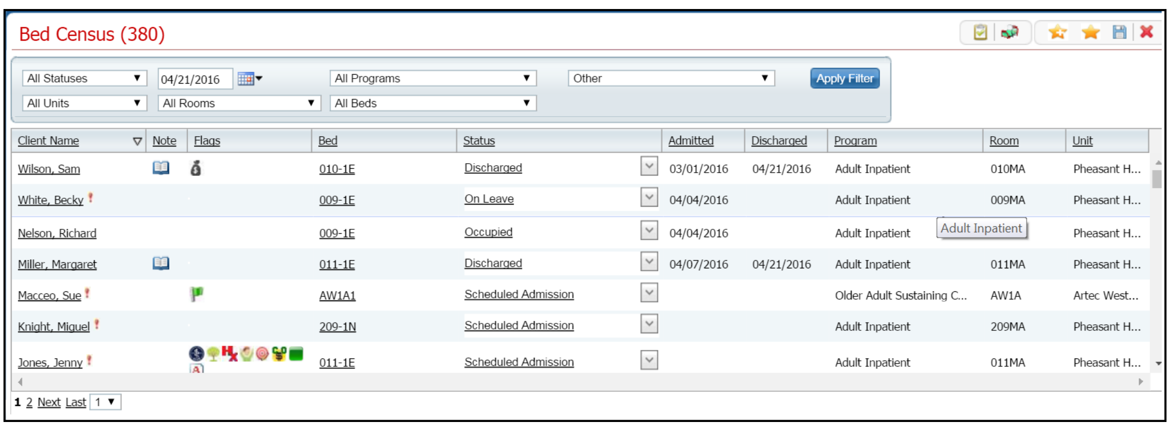
Before You Begin

The client must be admitted to a bed with a status of *Occupied* or *Scheduled On Leave* before you can put the client *On Leave*.

To Set a Client On Leave

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).

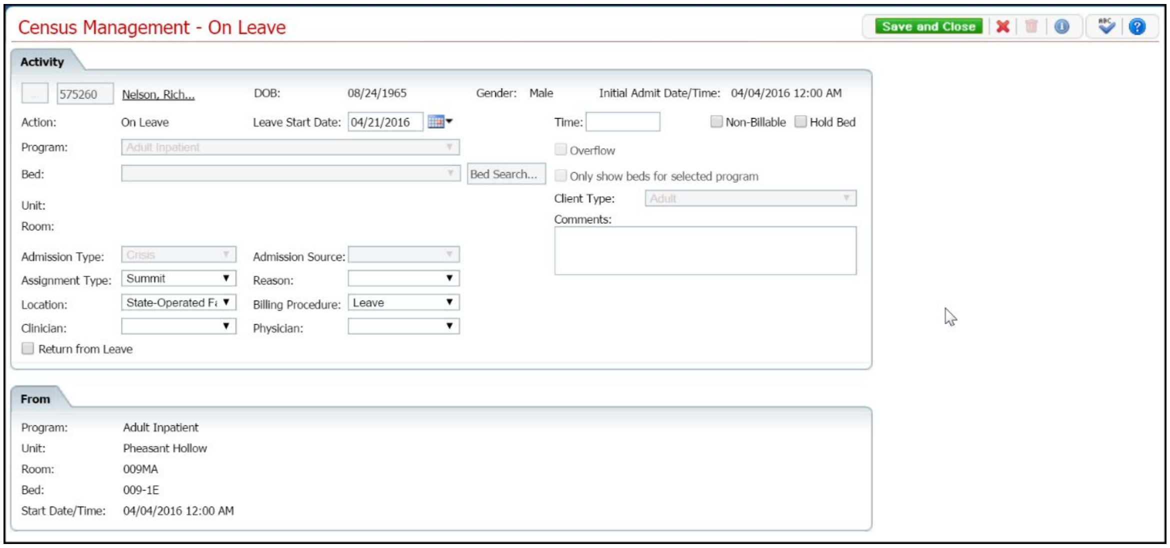


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the client who you want to set on leave. Tell me how... (See page 112)

4. Click the **drop down arrow** in the *Status* column of the client you want to set on leave and select **On Leave**.

   The *Census Management - On Leave* page is displayed. View field definitions (See page 79).



5. Complete the required and necessary fields on the *Census Management - On Leave* page.

6. When the page is complete, click the **Save and Close** button in the toolbar.

The *Bed Census* list page is displayed. A second record for the client is displayed with the *Status* of *On Leave*.

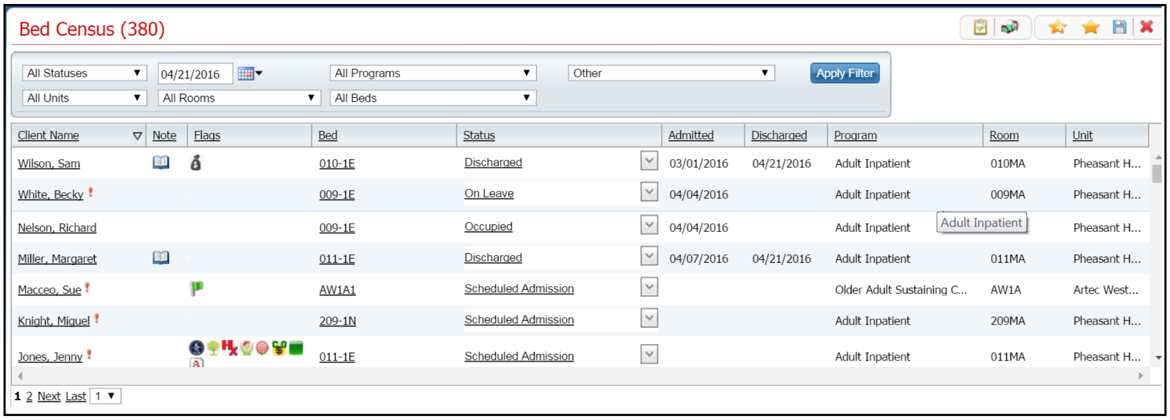
To Change a Client's On Leave Setting

To change an on leave setting, you can change the:

- Start Date
- End Date
- Action to:
    - Return from Leave
    - Schedule Return from Leave
    - Discharge

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

The *Bed Census* list page is displayed. View field definitions (See page 69).

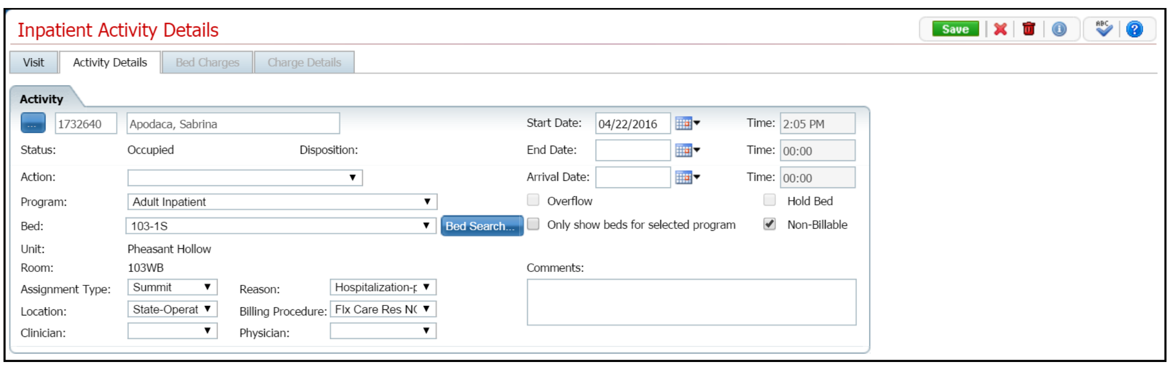


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** whose on leave setting you want to change. Tell me how... (See page 112)

4. Click the **On Leave** hyperlink in the *Status* column for the client.

The *Inpatient Activity Details* page is displayed with the *Activity Details* tab active. View field definitions (See page 109).



5. Complete the **fields** on the *Inpatient Activity Details* page.

- Change the *Start Date* and *End Date*
- Change or add one of the following *Actions*:
    - Bed Change - use this procedure (See page 14) starting with step 4.
    - Transfer - use this procedure (See page 61) starting with step 5.
    - On Leave - use this procedure (See page 42) starting with step 5.
    - Discharge - use this procedure (See page 28) starting with step 5.
    - Schedule Bed Change - use this procedure (See page 18) starting with step 5.
    - Schedule Transfer - use this procedure (See page 58) starting with step 5.
    - Schedule On Leave - use this procedure (See page 52) starting with step 5.

6. When the page is complete, click the **Save** button in the task bar.

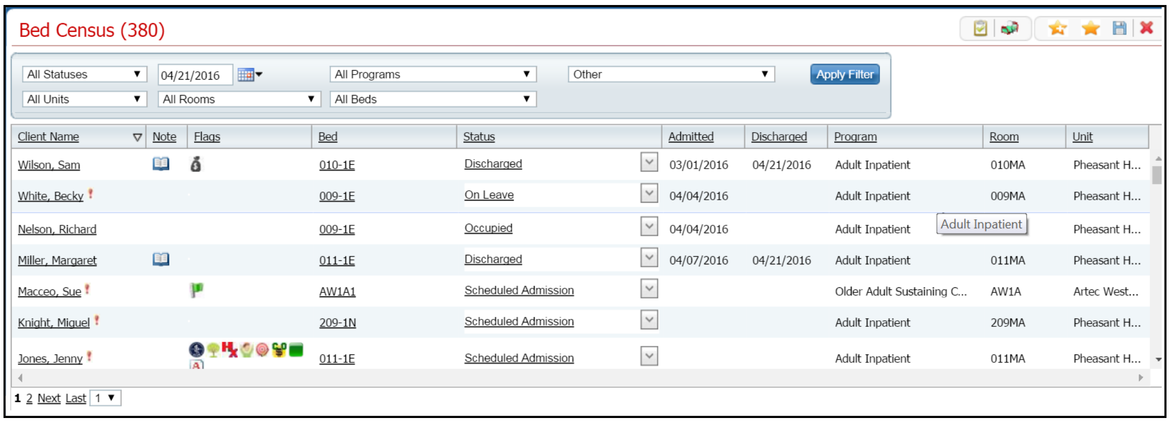
7. Click the **Exit**  toolbar item to return to the *Bed Census* page.

To Delete a Client's On Leave Setting

If you have put a client *On Leave* in error, you can delete the *On Leave* setting.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).

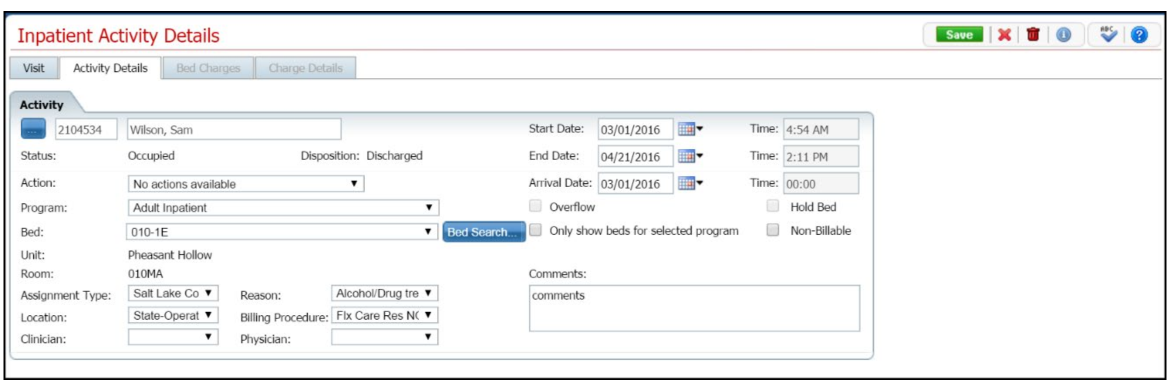


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the **client** whose *on leave* setting you want to change. Tell me how... (See page 112)

4. Click the **On Leave** hyperlink in the *Status* column for the client.

   The *Inpatient Activity Details* page is displayed with the *Activity Details* tab active.



5. Click the **trash can**  toolbar item in the toolbar.

The *Confirmation Message* window is displayed.

6. In the *Confirmation Message* window, click the **Yes** button.

   The *Bed Census* page is displayed. The client's status is displayed as *Occupied*. The client record with a status of *On Leave* is no longer displayed.

Why can't I access these screens? (See page 127)

Schedule a Client for Return from Leave

When you put a client *On Leave*, you can schedule the date for the client's return from leave set on a future date. *On Leave* means the client's status is still admitted, but they are away from the facility with permission.

Use these procedures to schedule a client's return from leave setting:

Schedule a Return from Leave (See page 47)

Change a Schedule Return from Leave (See page 48)

Delete a Client's Scheduled Return from Leave (See page 50)

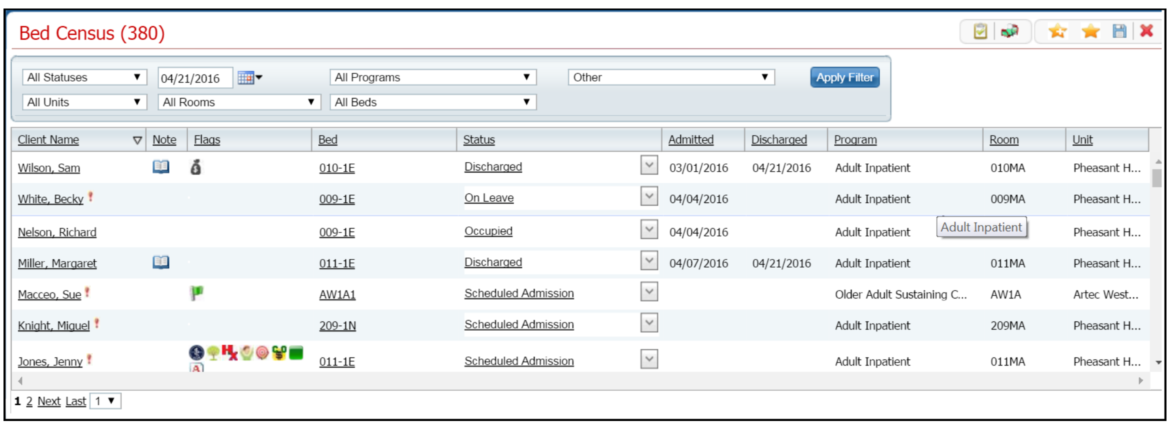
Before You Begin

The client's status must be *Occupied* to set the status to *Schedule Return From Leave*.

To Schedule a Client for Return from Leave

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).

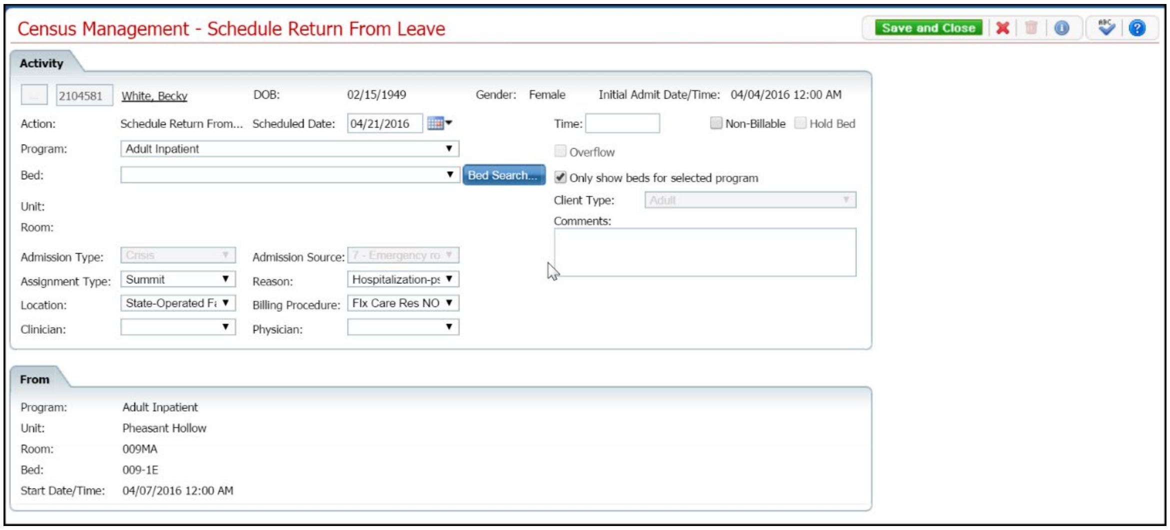


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the client who you want to schedule return from leave. Tell me how.. (See page 112).

4. Click the **drop down arrow** in the *Status* column of the client you want to schedule return from leave and select **Schedule Return from Leave**.

   The *Census Management - Schedule Return From Leave* page is displayed.



5. Complete the required and necessary fields on the *Census Management - Schedule Return From Leave* page. View field definitions (See page 89).

6. When the page is complete, click the **Save and Close** button in the task bar.

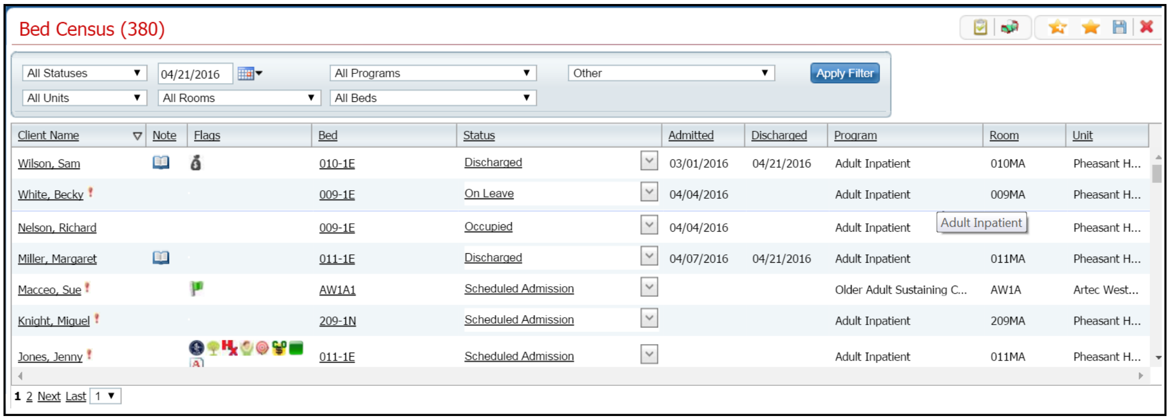
To Change a Schedule Return from Leave Status

On a *Schedule Return From Leave* status, you can change:

- Start date of the scheduled return from leave
- The Action to one of the following
    - Return from Leave
    - Schedule Bed Change
    - Schedule Transfer
    - Schedule On Leave

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).

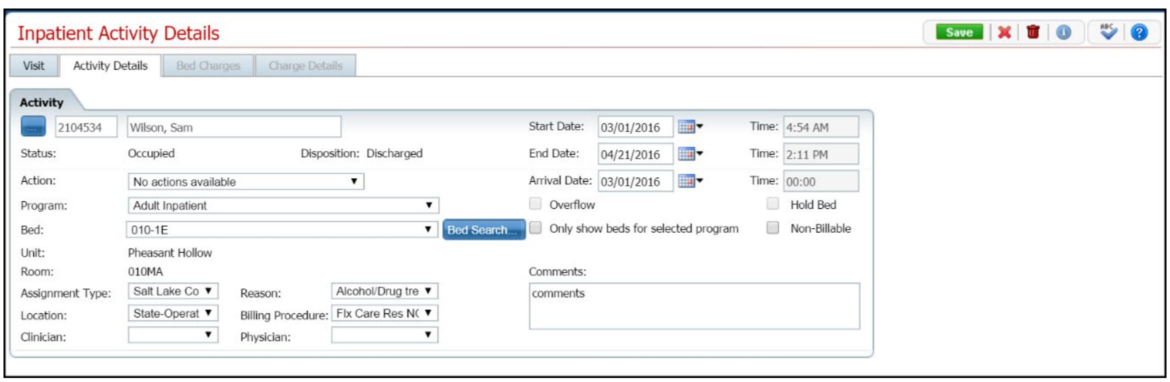


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the client who you want to change the scheduled return from leave. Tell me how.. (See page 112).

4. Click the **Scheduled Return From Leave** hyperlink in the *Status* column of the client record you want to change.

The *Inpatient Activity Details* page is displayed with the *Activity Details* tab active. View field definitions (See page 109).



5. On the *Inpatient Activity Details* page *Activity Details* tab, you can change the:

- Start date
- Action to one of the following:
  - Return from Leave - The *Census Management - Return From Leave* page is displayed. Tell me how.. (See page 38).Start with step 5.
  - Schedule Bed Change - The *Census Management - Schedule Bed Change* page is displayed. Tell me how... (See page 18) Start with step 5.
  - Schedule Transfer - The *Census Management - Schedule Transfer* page is displayed. Tell me how... (See page 58) Start with step 5.

- o Schedule On Leave - The *Census Management - Schedule On Leave* page is displayed. Tell me how... (See page 52) Start with step 5.

6. When the page is complete, click the **Save** button in the tool bar.

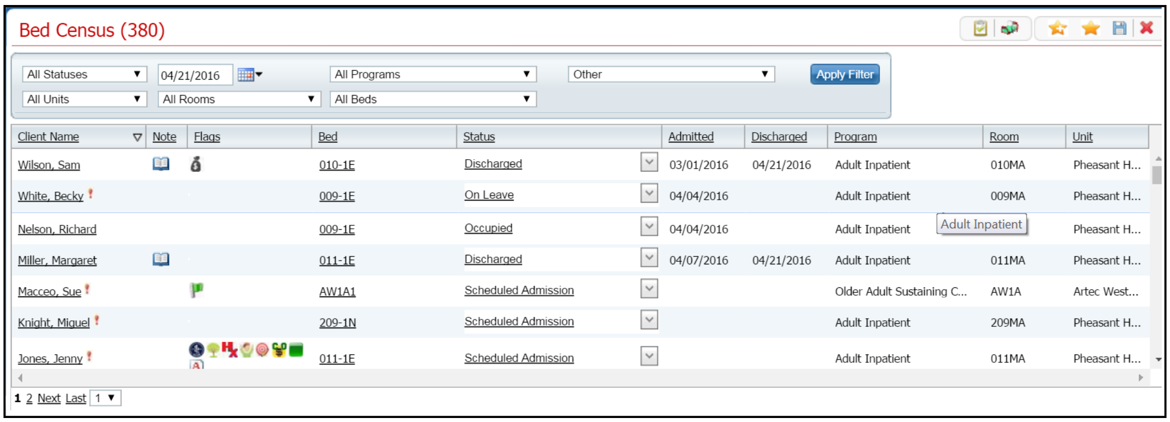
   The *Inpatient Activity Details* page is displayed with the *Activity Details* tab active. If you completed an *Action*, the action is listed below the *Scheduled Return from Leave* record.

To Delete a Client's Scheduled Return From Leave Setting

If you have put a client as *Schedule Returned From Leave* in error, you can delete the *Schedule Return From Leave* record.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).

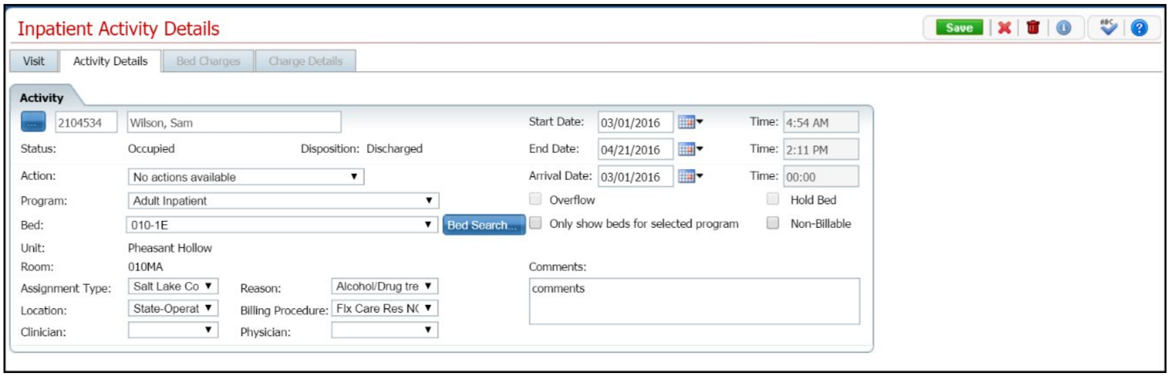


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the client whose on leave setting you want to change. Tell me how.. (See page 112).

4. Click the **Scheduled Return From Leave** hyperlink in the *Status* column for the client.

   The *Inpatient Activity Details* page is displayed with the *Activity Details* tab active. View field definitions (See page 109)..

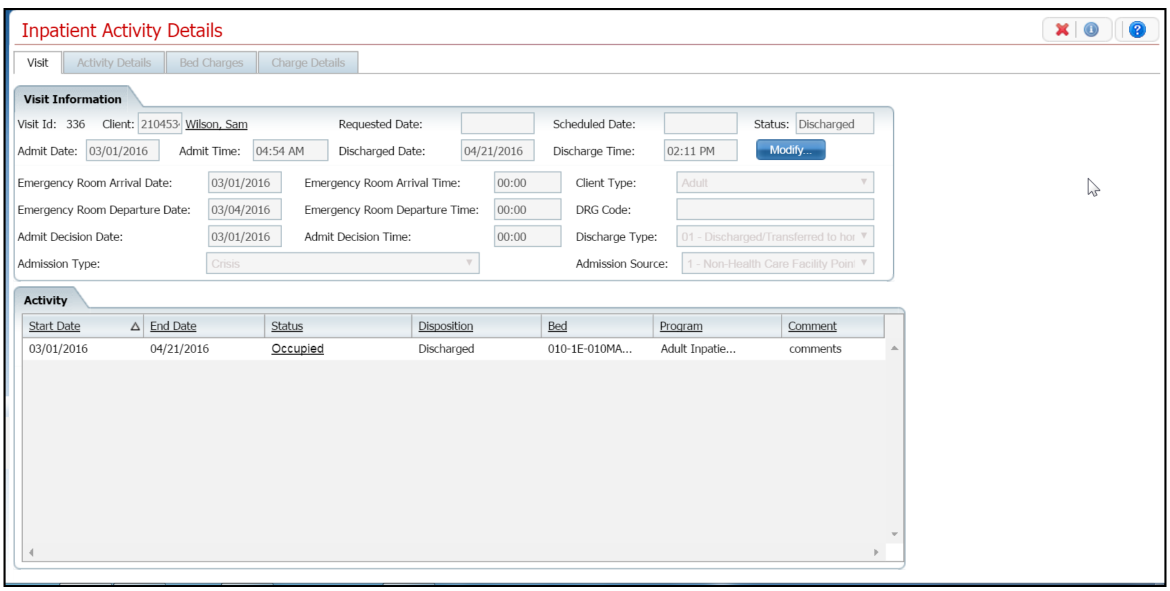


5. Click the **trash can**  toolbar item in the task bar.

   The *Confirmation Message* window is displayed.

6. In the *Confirmation Message* window, click the **Yes** button.

   The *Inpatient Activity Details* page is displayed with the *Vis*it tab active. View field definitions (See page 105).



The *Scheduled Return From Leave* record is no longer displayed in the *Activity* section.

7. Click the **Exit** toolbar item  to close the page.

   The *Bed Census* page is displayed. The client's status is displayed as *Occupied*.

Why can't I access these screens? (See page 127)

Schedule a Client On Leave

On Leave means the client's status is still admitted, but they are away from the facility with permission. Scheduling a client *On Leave* means you are setting the start date for the leave status in the future.

Use these procedures to manage scheduling a client's on leave setting:

Schedule a Client On Leave (See page 52)

Change a Client's On Leave Setting (See page 54)

Delete a Client's On Leave (See page 55)

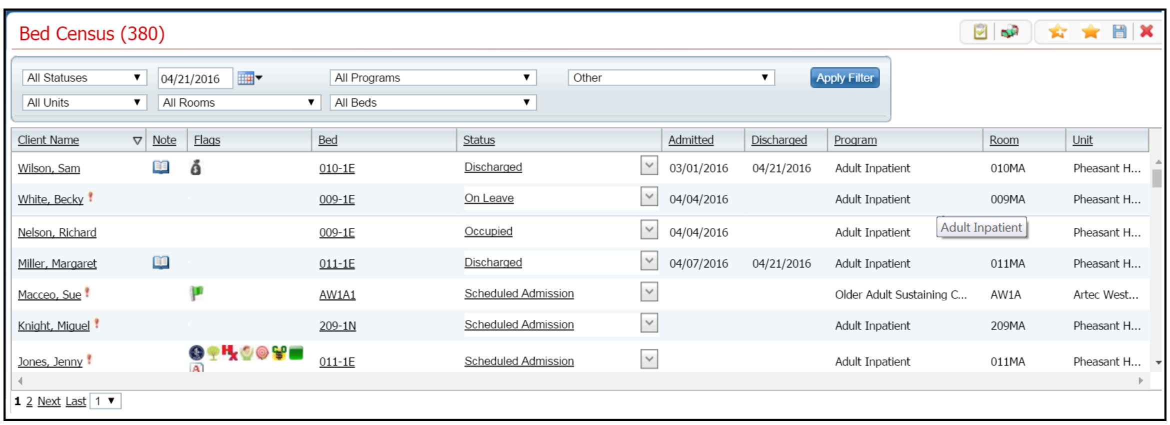
Before You Begin

The client must have a status of *Occupied* before you can schedule the client *On Leave*.

To Schedule a Client On Leave

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).

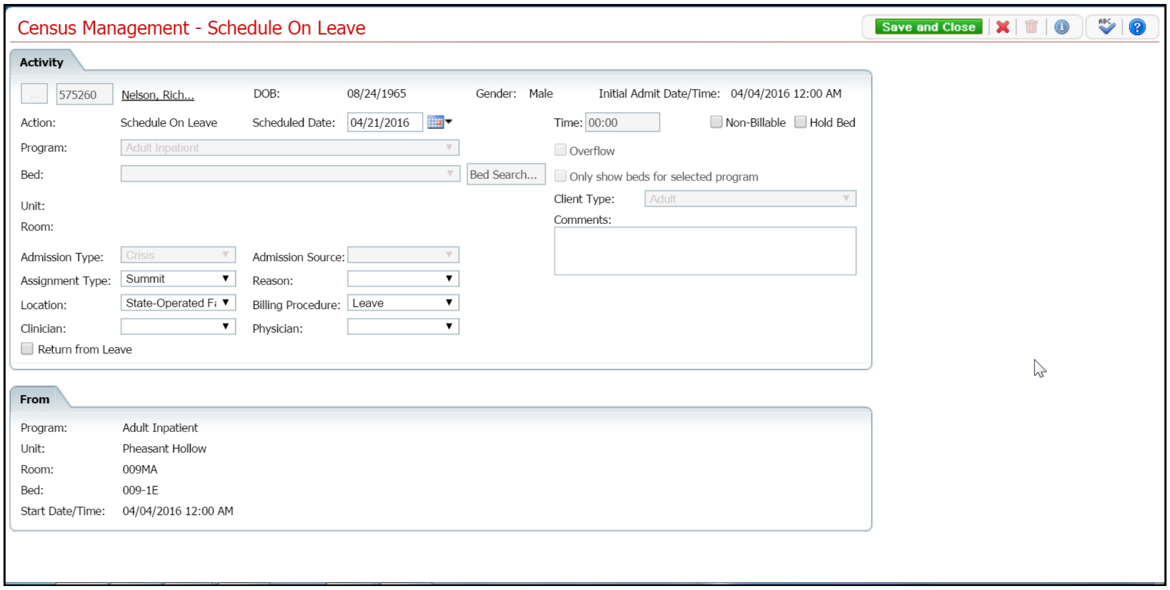


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the client who you want to set on leave. Tell me how... (See page 112)

4. Click the **drop down arrow** in the *Status* column of the client you want to schedule on leave and select **Schedule On Leave**.

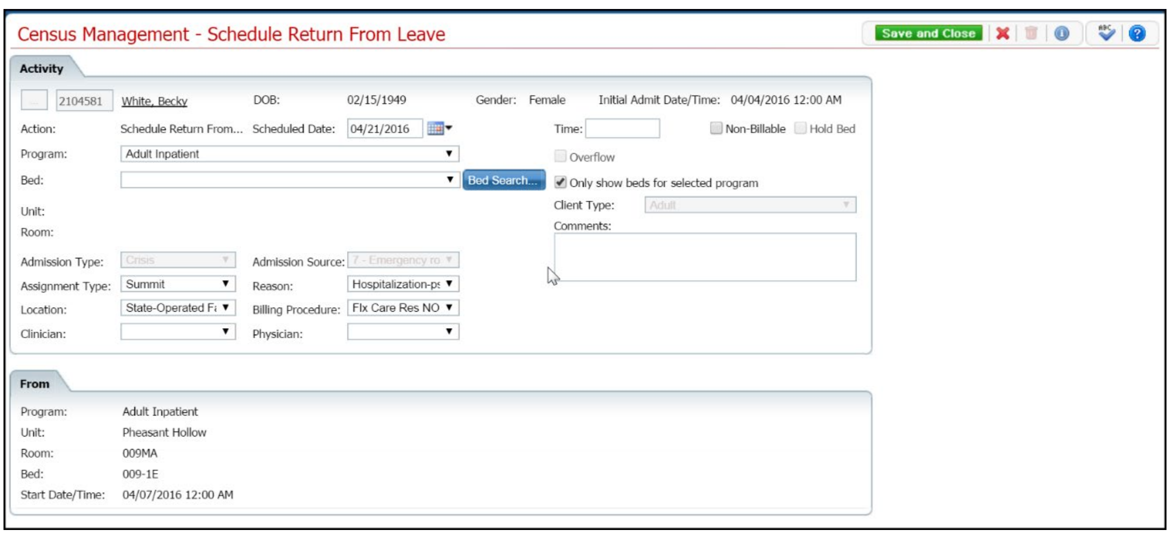
   The *Census Management - Schedule On Leave* page is displayed. View field definitions (See page 87).



5. Complete the **required and necessary fields** on the *Census Management - Schedule On Leave* page.

6. To *Schedule Return from Leave* for this client at this time, check the **Return from Leave** checkbox.

The *Return* section is displayed at the bottom of the *Census Management - Schedule Return From Leave* page.



7. Complete the **Return** section. View field definitions (See page 92).

8. When the page is complete, click the **Save and Close** button in the task bar.

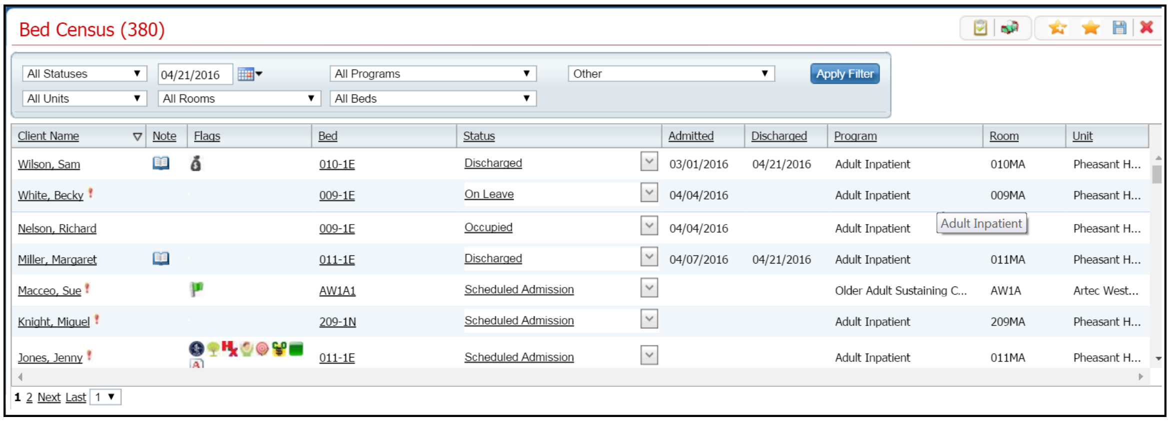
To Change a Client's Scheduled On Leave Setting

To change a scheduled on leave setting, you can change the:

- Start Leave Date
- Action to:
    - On Leave
    - Schedule Return from Leave

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (#####)* list page.

   The *Bed Census* list page is displayed. View field definitions (See page 69).



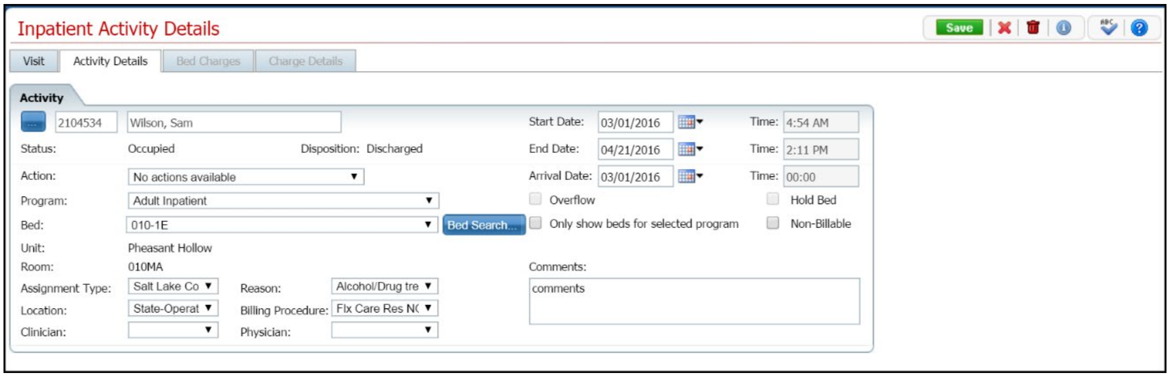
2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

   Note: Be sure to change the date in the *Filter* section to the date for the client's scheduled leave to display the information on the *Bed Census* list page.

3. Find the client whose scheduled on leave setting you want to change. Tell me how... (See page 111)

4. Click the **Scheduled On Leave** hyperlink in the *Status* column for the client.

   The *Inpatient Activity Details* page is displayed with the *Activity Details* tab active. View field definitions (See page 109).



5. Complete the fields on the *Inpatient Activity Details* page. You can:

- Change the *Start Date*
- Change or add one of the following *Actions*:
  - On Leave - The *Census Management - On Leave* page is displayed. Tell me how... (See page 42) Start with step 5.
  - Schedule Return From Leave - The *Census Management - Schedule Return from Leave* page is displayed. Tell me how... (See page 47) Start with step 5.

6. When the page is complete, click the **Save and Close** button in the task bar.

7. Click the close page toolbar item  to return to the *Bed Census* page.

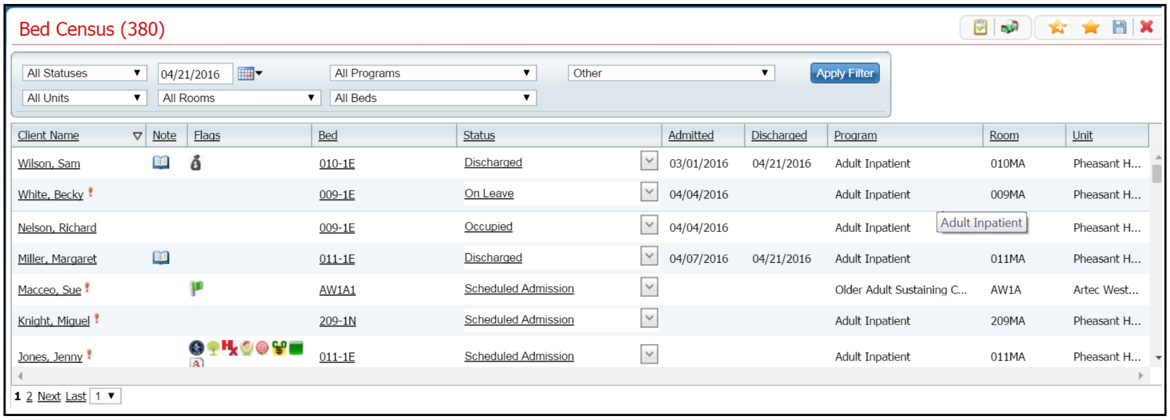
The *Bed Census* page is displayed. Note that the client's *Scheduled On Leave* status is no longer display and the current client record has a Status of On Leave.

To Delete a Client's Scheduled On Leave Setting

If you have put a client's *Scheduled On Leave* status in error, you can delete the setting.

1. Follow this path: **My Office tab > Inpatient/Residential banner > Residential sub-banner** to display the *Bed Census (####)* list page.

The *Bed Census* list page is displayed. View field definitions (See page 69).

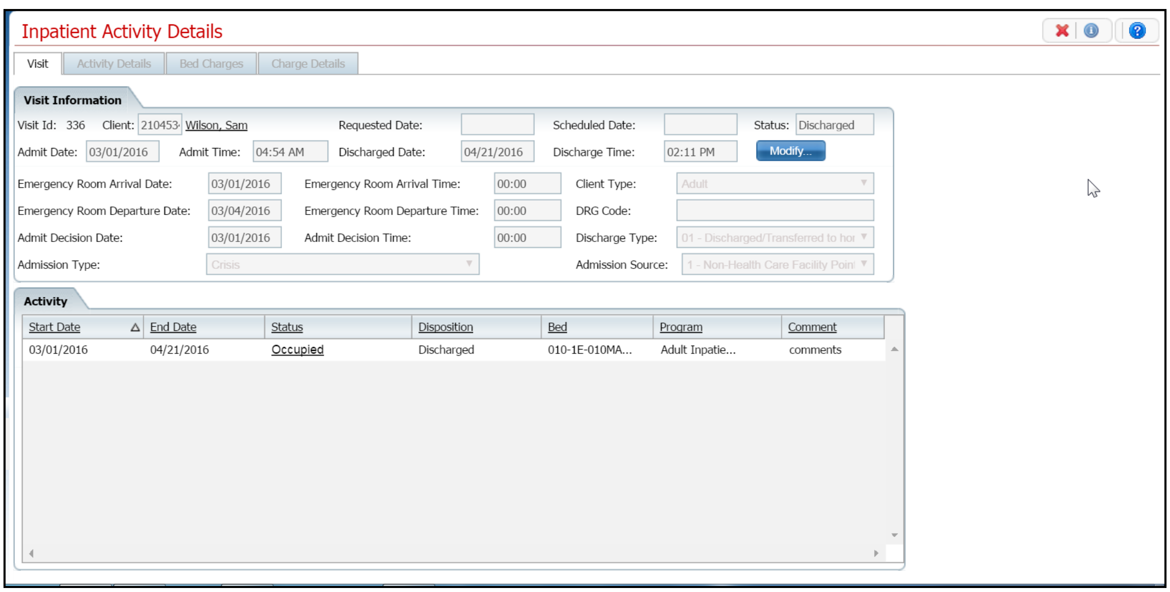


2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Find the client whose on leave setting you want to change. Tell me how... (See page 112)

4. Click the **open book** toolbar item  in the *Note* column for the client.

The *Inpatient Activity Details* page is displayed with the *Visit* tab active.



5. In the *Activity* section, click the **hyperlinked status** for the *Scheduled On Leave*.

The *Activity* section is displayed with the details for the selected *Scheduled On Leave*.

6. Click the trash can  toolbar item.

The *Confirmation Message* window is displayed.

7. In the *Confirmation Message* window, click the **Yes** button.

   The *Inpatient Activity Details* page is displayed with the Visit tab active. The *Scheduled On Leave* record is deleted.

8. Click the **Exit** toolbar item  in the task bar.

   On the *Bed Census* list page, the client's status is displayed as *Occupied*. The client's record with a status of Scheduled Return From Leave is no longer displayed.

Why can't I access these screens? (See page 127)

Transfer

Schedule a Client's Transfer

You can schedule a transfer for a client who is being admitted to a different program. This transfer may also require transferring to a new bed.

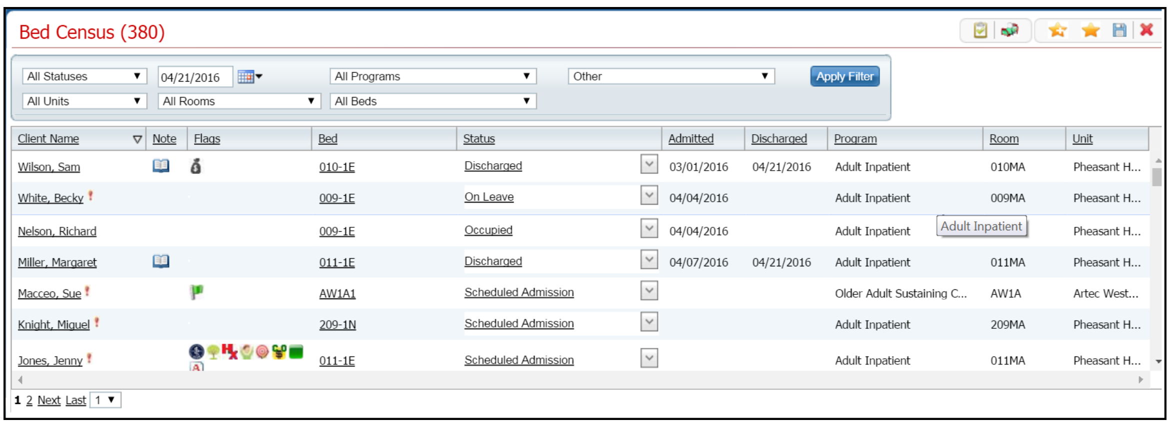
Before You Begin

Make sure the client is enrolled in the new program before scheduling the transfer. Tell me how...

To Schedule a Client's Transfer

1. Make sure the *Bed Census* list page is displayed. Tell me how...

   The *Bed Census* list page is displayed. View field definitions (See page 69).

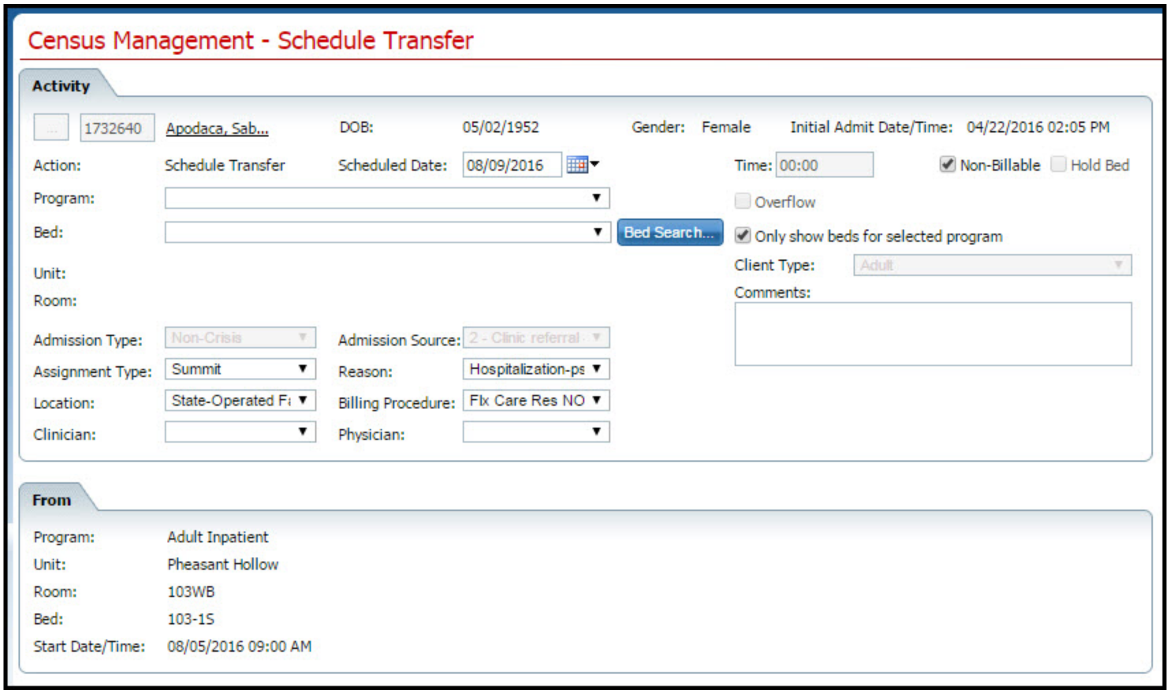


2. Filter the list to determine the records that are displayed. Tell me how...

3. Find the **client** on the *Bed Census* list page. **Tip:** Click the *Client Name* column heading to place all the clients in alphabetical order and find the client.

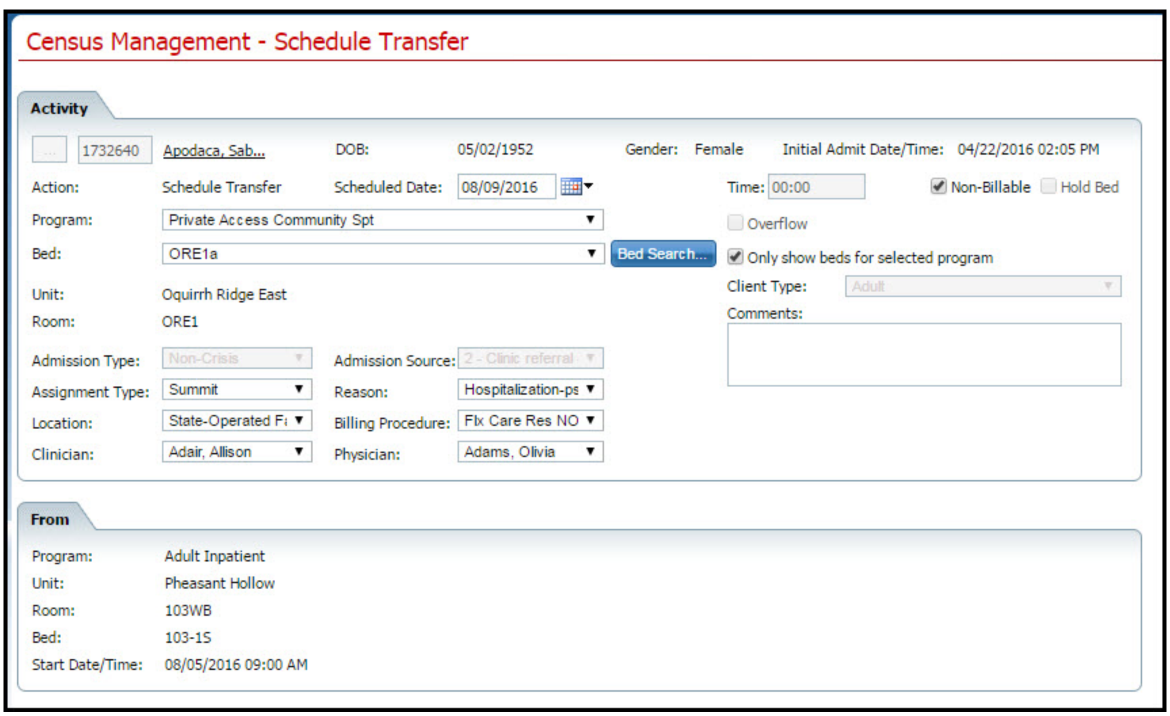
4. Click the **drop down arrow** in the *Status* column and select **Schedule Transfer**.

   The *Census Management - Schedule Transfer* page is displayed. View field definitions (See page 93).



5. Search for and select an **open bed** in the new program. Tell me how... (See page 114)

The *Census Management - Schedule Transfer* page is displayed with the new program and bed information filled in. View field definitions (See page 93).



6. Complete the remaining fields on the *Census Management - Schedule Transfer* page.

7. When the page is complete, click the **Save and Close** button in the task bar.

Why can't I access these screens? (See page 127)

Transfer a Client

When you transfer a client you are transferring to a new program and a new bed. If you need to transfer the client to a new bed, but same program, use the Bed Change (See page 14) task.

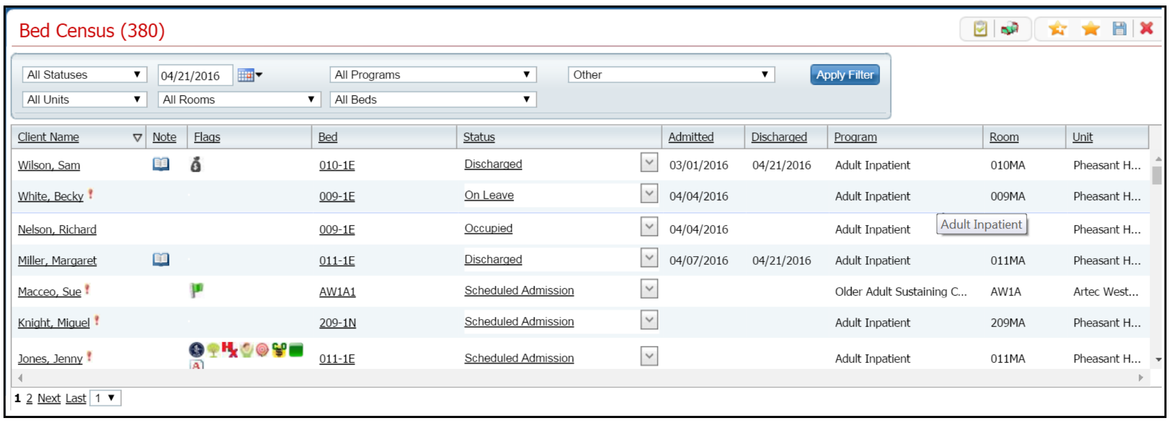
Before You Begin

Make sure the client is registered in the new program before transferring them. Tell me how...

To Transfer a Client

1. Make sure the *Bed Census* page is displayed. Tell me how...

   The *Bed Census* list page is displayed. View field definitions (See page 69).

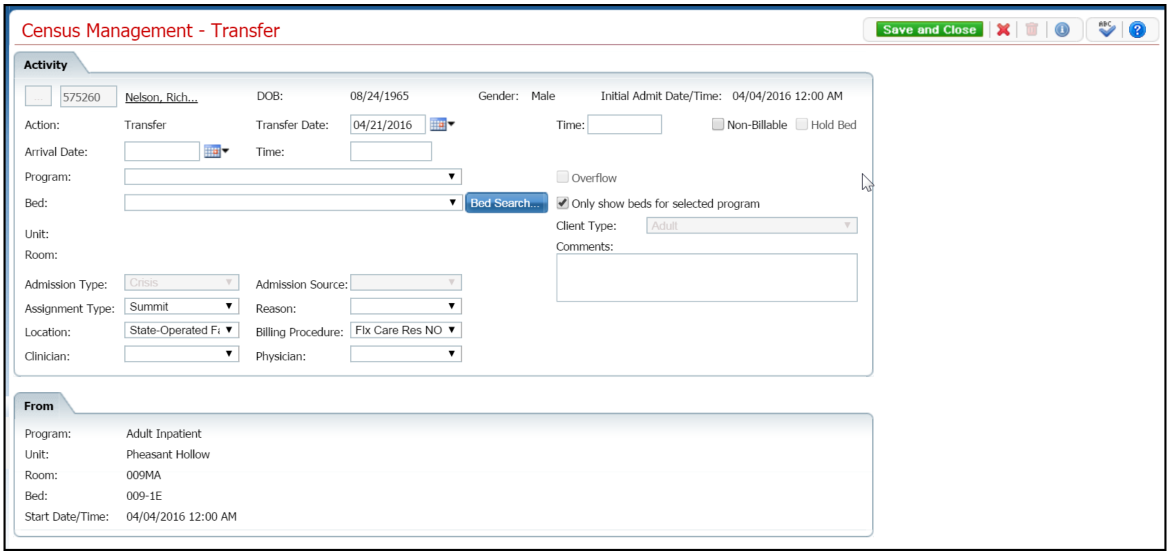


2. Filter the list to display the correct *Unit, Rooms, Beds* and *Programs*. Tell me how...

3. Find the **client** on the *Bed Census* list page. **Tip:** Click on the Client Name heading in the column to arrange the clients' names alphabetically.

4. Click the **drop down arrow** in the *Status* column and select **Transfer**.

   The *Census Management - Transfer* page is displayed. View field definitions. (See page 95)



5. In the *Program* field, select the **new program** to transfer the client to.

6. Search for and select an open bed in the new program. Tell me how... (See page 114)

   The *Census Management - Transfer* page is displayed with the new program and bed information filled in. View field definitions. (See page 95)

7. Complete the remaining fields on the *Census Management - Transfer* page.

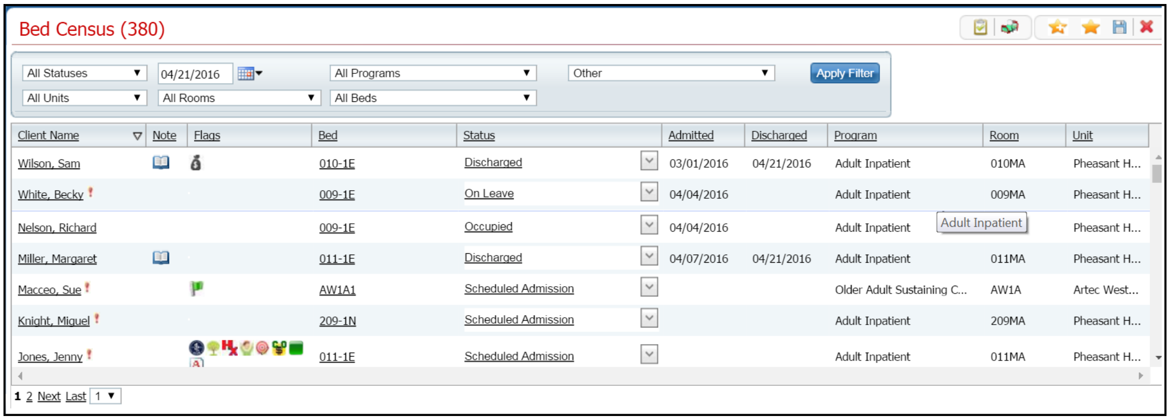
   The *Bed Census* list page is displayed.

Why can't I access these screens? (See page 127)

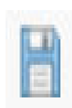
Export Bed Census Data

You can export the data you view on the *Bed Census* list page into an Excel spreadsheet. All the columns, column headings and client records are inserted into the Excel worksheet.

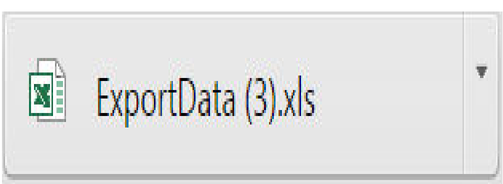
1. Make sure the *Bed Census* list page is displayed. Tell me how... View field definitions (See page 69).



2. If needed, change the filters. All the record lines that are displayed on the list page are exported to the Excel spreadsheet. Tell me how...

3. Click the **Export**  toolbar item in the task bar.

The *Export file* tab is displayed in the lower left corner of your screen.



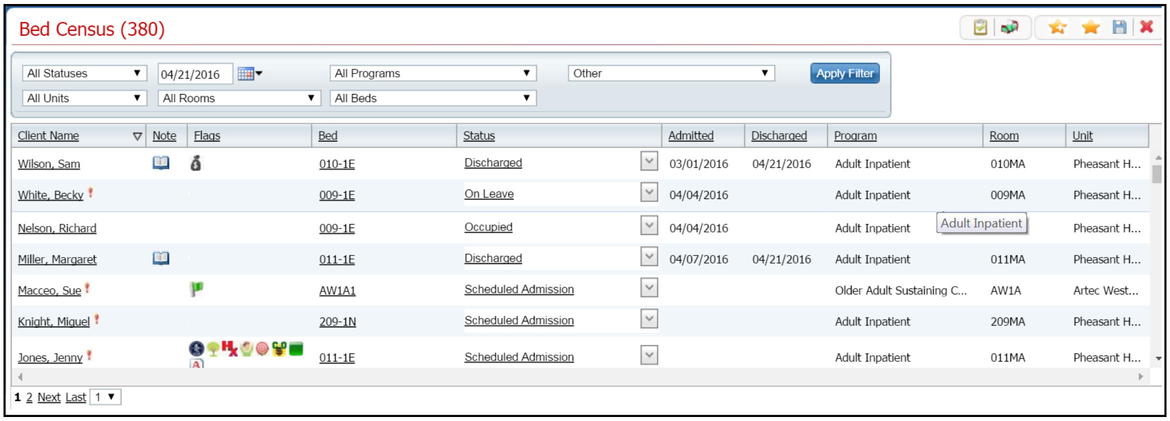
4. Click on the **ExportData** file toolbar item in the task bar in the browser window to open the file in Microsoft Excel.

5. In Excel, you can **Save** the file with a new name and **Print** the file.

Why can't I access these screens? (See page 127)

Take Bed Attendance

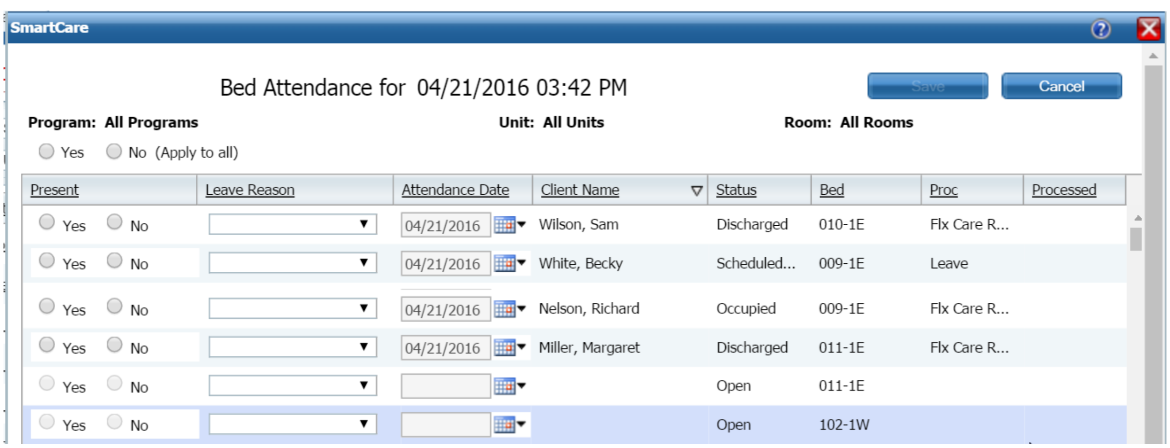
1. Make sure the *Bed Census* page is displayed. Tell me how... View [field definitions](#) (See page 69).



2. Filter the list to display the specific information on the *Bed Attendance* window. Tell me how...

3. Click the **View Attendance**  toolbar item.

The *Bed Attendance for <current day's date>* is displayed. View [field definitions](#) (See page 68).



4. Select either the **Yes** or **No** radio button in the *Present* column for each client with a status of *Occupied* to identify whether the client is in attendance or not.

-or-

To select **Yes** or **No** for all patients at a time, click the **Yes** or **No** radio button at the top of the list table. You can then deselect any lines that are different, if needed.

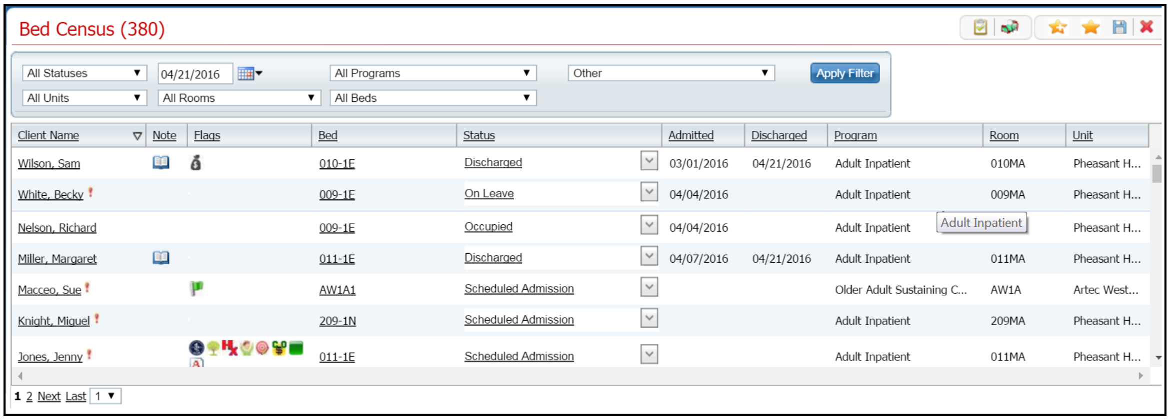
5. When all clients' attendance is entered, click the **Save** button.

Why can't I access these screens? (See page 127)

View Visit Information

1. Make sure the *Bed Census* list page is displayed. Tell me how...

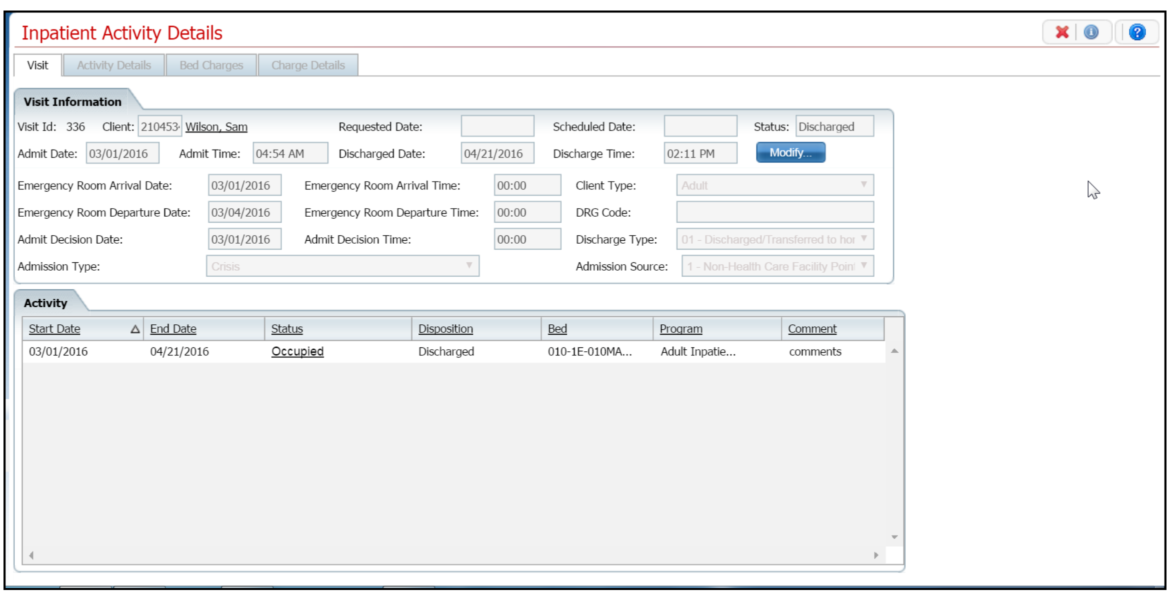
   The *Bed Census* list page is displayed. View field definitions (See page 69).



2. To view the current status and active date, hover the **mouse** over the **open book**  toolbar item in the *Note* column for the client you want to view.

3. To view the *Inpatient Activity Details* page, click the **open book** toolbar item in the *Note* column for the client you want.

   The *Inpatient Activity Details* page is displayed with the *Visit* tab active.



4. Click on the *Visit* tab, if it is not the active tab.

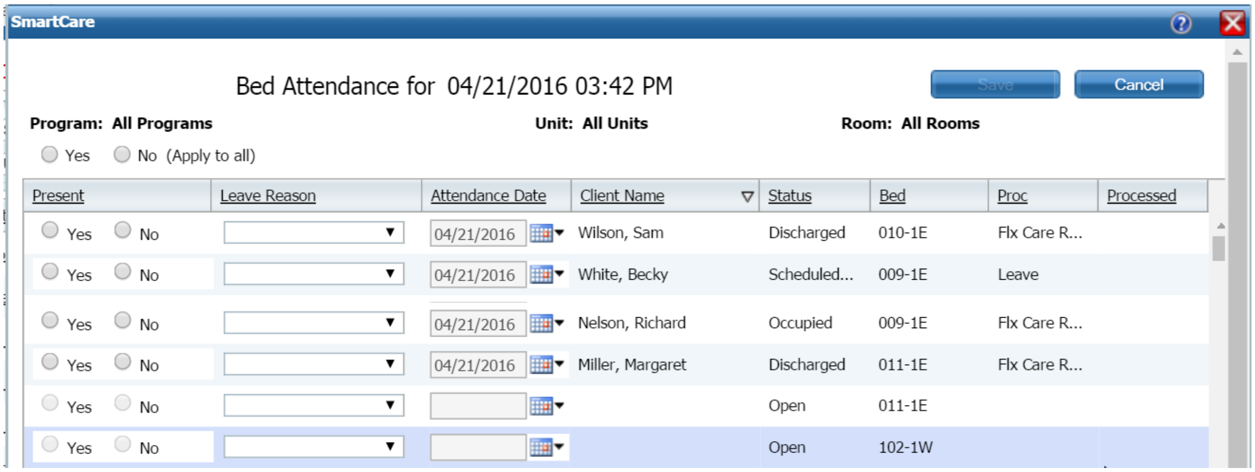
5. In the *Visit Information* section, click on the **Modify** button to modify visit information. Tell me how... (See page 102)

6. To change an activity shown in the *Activity* section, click on an **underlined status** in the *Status* column. Tell me how... (See page 103)

Why can't I access these screens? (See page 127)

Field Definitions

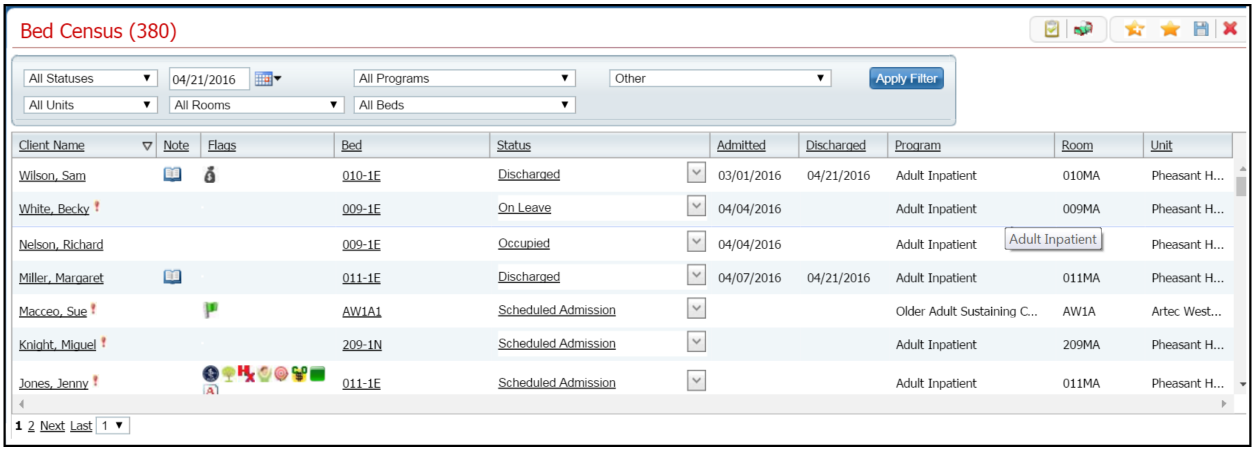
Bed Attendance Window Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Program	Identifies the *Program* selected on the *Bed Census* list page. To view a different program, exit the *Bed Attendance* window and change the filter on the *Bed Census* list page. Then, select **View Attendance** toolbar item again.
Unit	Identifies the *Unit* selected on the *Bed Census* list page. To view a different unit, exit the *Bed Attendance* window and change the filter on the *Bed Census* list page. Then, select **View Attendance** toolbar item again.
Rooms	Identifies the *Beds* selected on the *Bed Census* list page. To view different beds, exit the *Bed Attendance* window and change the filter on the *Bed Census* list page. Then, select **View Attendance** toolbar item again.
Yes/No	Selects the *yes* or *no* option for all *Occupied* beds.
List Box	
Present	Select the *yes* or *no* radio button to indicate whether or not the patient is occupying the listed bed.
Leave Reason	If the client is on leave, identifies the reason for leave. Click the **drop down arrow** to change the leave reason.
Attendance Date	Defaults to the current day's date.
Client Name	Identifies the Client's name last name, first name.
Status	Identifies the client's status.
Bed	Identifies the bed the client is occupying.
Proc	Identifies the procedure for that identifies the client occupying the bed. This procedure code is matched to a billing code and charge to prepare for the claims process.
Processed	A ??? in this column identifies those bed's attendance was processed in the overnight job.???

Bed Census List Page Field Definitions

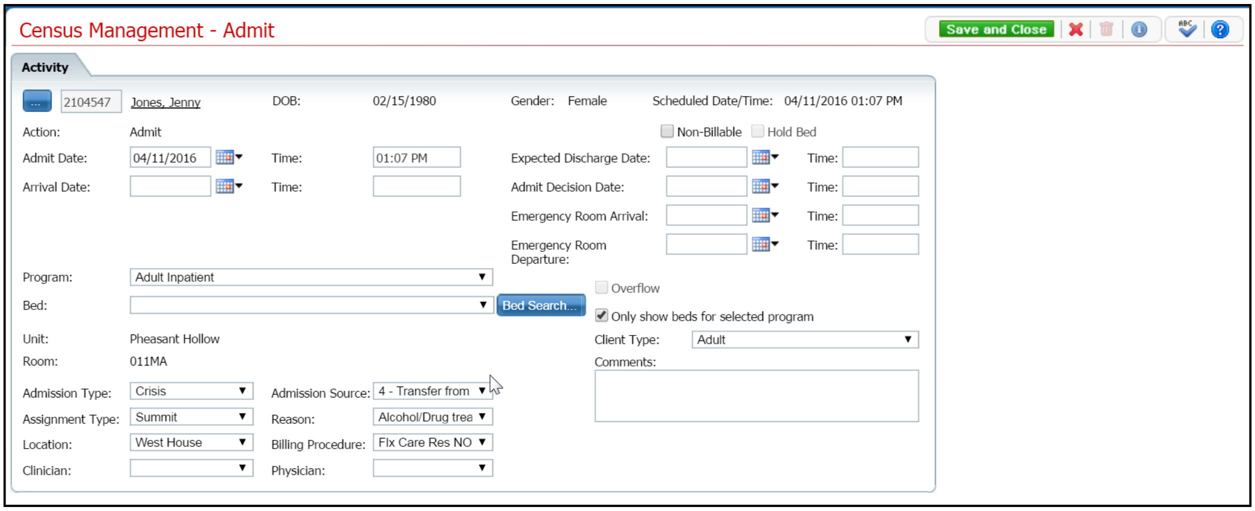


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Filter	
All Statuses	Use to limit the status that is displayed on the page. Statuses are: • All Statuses • Leave • Occupied • Open • Scheduled
Date	Select a date from the calendar to limit the items listed to those who have activity on this date.
All Programs	Select a program from the drop down list to view only clients admitted to the selected program. Options are: All Programs All programs set up for the Residential facilities
Other	The Other drop down only appears if your organization has selected to use this field. The options in the list are customizable by your organization.
All Units	Select a unit to view information for a specific Unit.
All Rooms	Select a room to view information for a specific Room.
All Beds	Select a bed to view information for a specific Bed.
List	
Client Name	Name of the client occupying the bed. Click on the client's name to display the *Client Information* page for the client.
Note	Information entered about this client.
Flags	Identifies flags inserted to identify special considerations or information about the client.
Bed	Identifies the bed the client occupies.
Status	Identifies the status of the client. A variety of statuses can appear in this column. Depending on the status, the items in the drop down list will change depending on the status selected. View Statuses.
Admitted	Identifies the date the client was admitted.

Field	Description
Discharged	Identifies the discharge date for the client.
Program	Identifies the Program the client is enrolled in.
Room	Identifies the Room where the client resides.
Unit	Identifies the Unit where the client resides.

Census Management - Admit Page Field Definitions

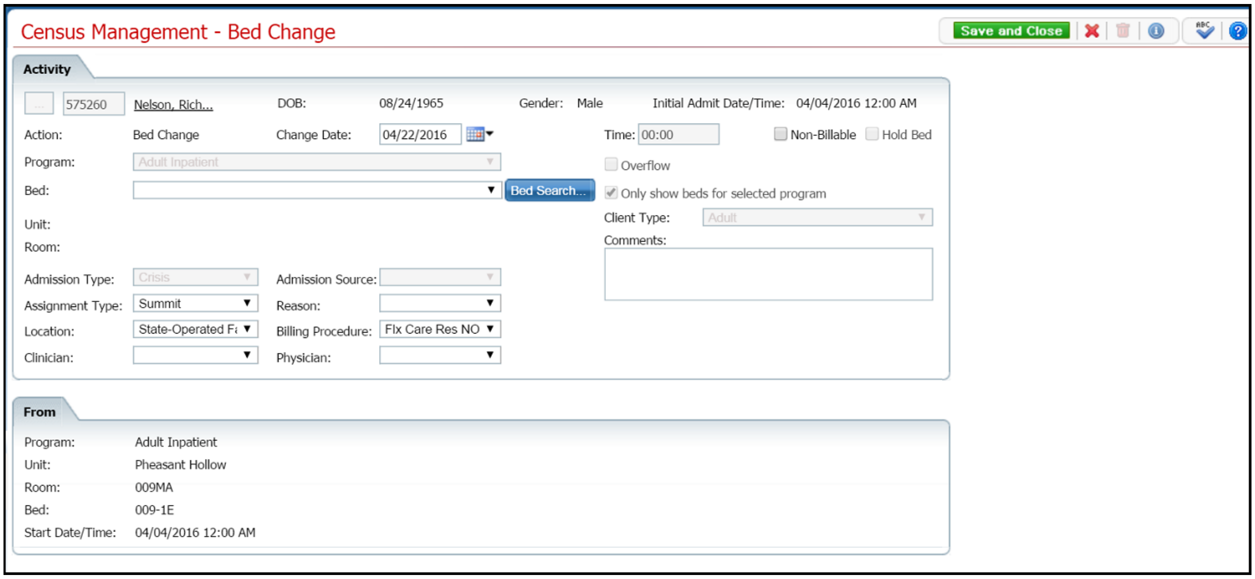


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
	Click this button to display the *Client Search* window. Tell me how.. (See page 112).
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Schedule Date/Time	Identifies a scheduled admission. If the client does not have a scheduled admission, this field is blank.
Action	Identifies the action you are taking for the client. For this procedure, it should display *Admit*.
Non-Billable	Check to identify the admission is non-billable.
Hold Bed	This check box is disabled.
Admit Date Time*	The current day's date is supplied in the field.
Expected Discharge Date Time	Enter the client's expected discharge date, if known.
Arrival Date Time	Enter the date and time the client is expected to arrive at the unit.
Admit Decision Date Time	Enter the date and time when the admission was decided on.
Emergency Room Arrival Time	Enter the date and time when the client arrived at the emergency room, if applicable.
Emergency Room Departure Time	Enter the date and time when the client is expected to leave or left the emergency room, if applicable.
Program	Identifies the program the client is being admitted to. Click the **drop down arrow** to change the program. **Note:** The client must be enrolled in the program to select a program in this field.
Overflow	What is this???

Field	Description
Bed	Identifies the bed the client is being admitted to. Click the **drop down arrow** to change the bed selection.
Bed Search button 	Click the **Bed Search** button to search for an open bed. Tell me how... (See page 114)
Only show beds for selected program	Select this checkbox so when using *Bed Search*, only the beds available for the selected program are displayed.
Unit	Identifies the unit where the client is being admitted.
Client Type*	Identifies the client type. Options are: • Adult • Adolescent • Child
Room	Identifies the room selected from the bed search.
Comments	Enter comments as needed for the admission. You can enter an unlimited number of characters. You can run spell check on your comments. Tell me how... (See page 121)
Admission Type*	Select the **Admission Type**. Identifies the immediacy of the admission. For example, options might be Elective, Emergency, Information not known, or Urgent.
Admission Source	Identifies the source of the admission.
Assignment Type	Identifies the *Assignment Type*. Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Identifies the presenting reason for the admission.
Location	Identifies the location of the facility.
Billing Procedure	Identifies the procedure code to use for billing for the services.
Clinician	Identifies the clinician who is working with the client.
Physician	Identifies this client's physician.

Census Management - Bed Change Field Definitions

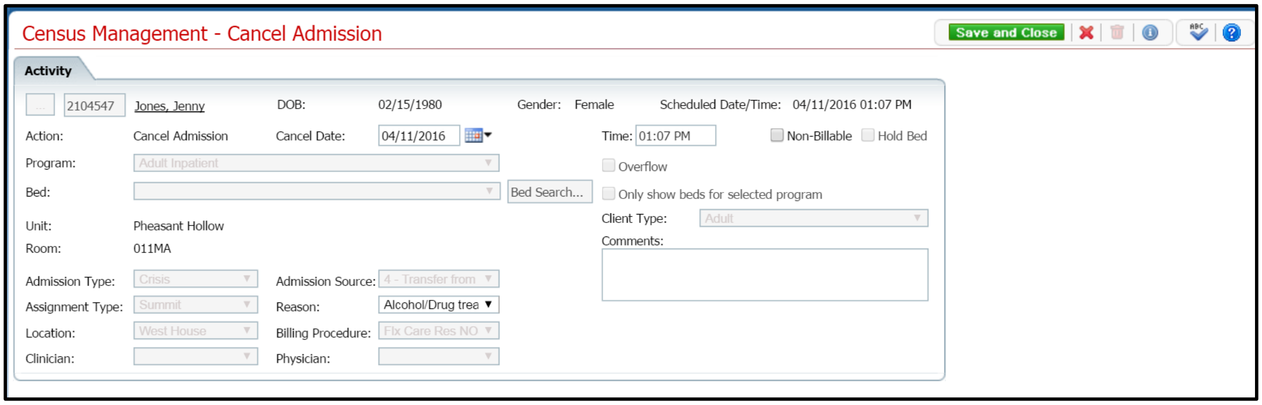


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
	Click on the button to search for a client. Tell me how... (See page 112)
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Initial Admit Date/Time	Identifies when the client was first admitted for this visit and the time of admission.
Action	Identifies the action you are taking for the client. For this task, *Bed Change* should be displayed.
Change Date Time	Identifies the date of the bed change. Defaults to the current day's date.
Non-Billable	Check to identify the admission is non-billable.
Hold Bed	This field is disabled.
Program	Identifies the client's current program. This field is display only.
Overflow	This field is disabled.
Bed*	Identifies the bed the client is changing to.
Bed Search button 	Use the **Bed Search** button to find a bed. Tell me how... (See page 114)
Only show beds for selected program	Identifies that only beds for the selected program are displayed. This field is disabled.
Unit	Identifies the unit where the client is admitted.

Field	Description
Client Type	Identifies the client type. Options are: • Adult • Adolescent • Child
Room	Identifies the room where the selected bed is located.
Comments	Enter comments as needed for this action. You can enter unlimited number of characters. You can run spell check on the text you enter. Tell me how... (See page 121)
Admission Type	Identifies the Admission Type selected on admission. Assignment type is a customizable set of categories that can be used by each organization as needed. This field is disabled.
Admission Source	Identifies the source of the admission selected on the admission. This field is disabled.
Assignment Type	Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Identifies the presenting reason for the admission.
Location	Identifies the location of the facility.
Billing Procedure	Identifies the procedure code to use for billing for the services.
Clinician	Identifies the client's clinician for this visit.
Physician	Identifies the client's physician.
From	
Program	Identifies the program the client is enrolled in.
Unit	Identifies the unit where the client's bed is located.
Room	Identifies the room where the client's bed is located.
Bed	Identifies the bed the client is currently occupying.
Start Date/Time	Identifies the start date and time of the client occupying the listed bed.

Census Management - Cancel Admission Page Field Definitions

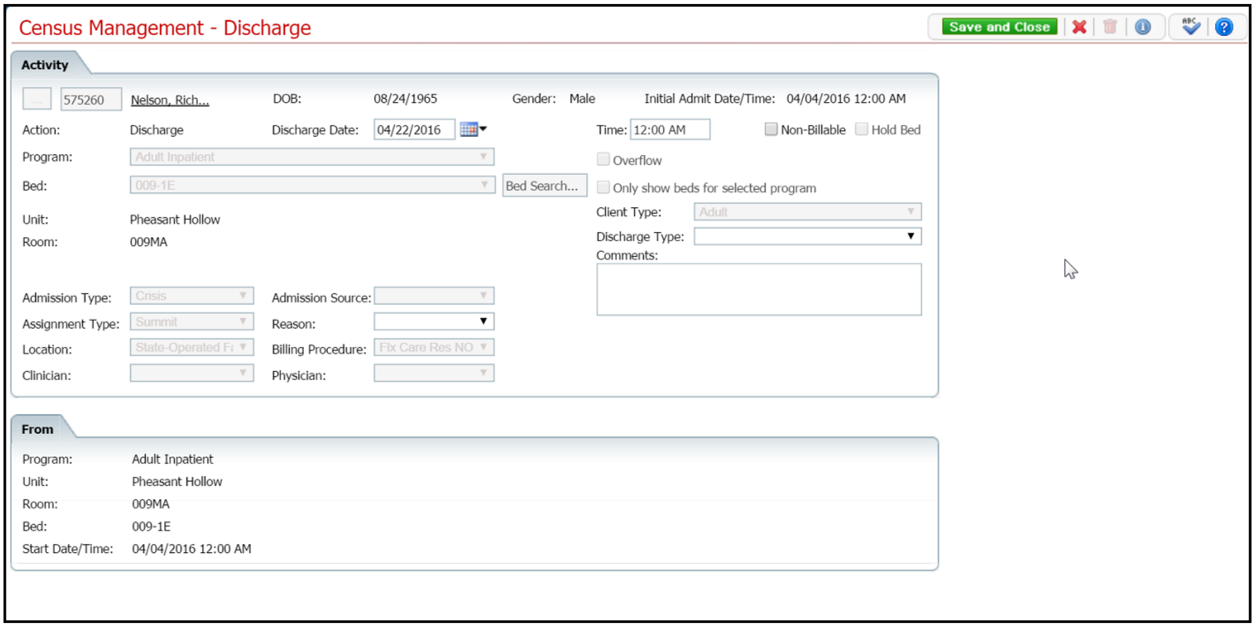


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	**Description**
	Click this button to display the *Client Search* window. Tell me how.. (See page 112).
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Scheduled Date Time	Select the date you expect to admit the client. Defaults to the current day's date.
Action	Identifies the action you are taking for the client. The field should display *Cancel Admission*.
Cancel Date Time	Identifies the date you are canceling the scheduled admission. Defaults to the current day's date. The time is defaulted when you save the action.
Non-Billable	Check to identify the admission is non-billable. When this option is checked no service charge is created for this action.
Hold Bed	This check box is disabled.
Program	Identifies the program the client is registered in. This field is disabled.
Overflow	What is this???
Bed	Identifies the bed you selected from the *Bed Census* page for this admission. This field is disabled.
Only show beds for selected program	Identifies that only beds that "belong" to the selected program are displayed when you search for a bed. This check box is disabled.
Unit	Identifies the unit where the client was scheduled for admission. Display only.
Client Type*	Identifies whether the client is: • Adult • Adolescent • Child This field is disabled.
Room	Identifies the room where the client was scheduled for admission.

Field	Description
Comments	Enter comments as needed for canceling the scheduled admission. Enter unlimited characters. You can run spell check on this field. Tell me how... (See page 121)
Admission Type*	Select whether the admission is Crisis or Non Crisis. This field is disabled.
Admission Source	Identifies the source of the admission. This field is disabled.
Assignment Type	Assignment type is a customizable set of categories that can be used by each organization as needed. This field is disabled.
Reason*	Identifies the reason for the cancellation.
Location	Identifies the location of the facility. This field is disabled.
Billing Procedure	Identifies the procedure code to use for billing for the services. This field is disabled.

Census Management - Discharge Page Field Definitions

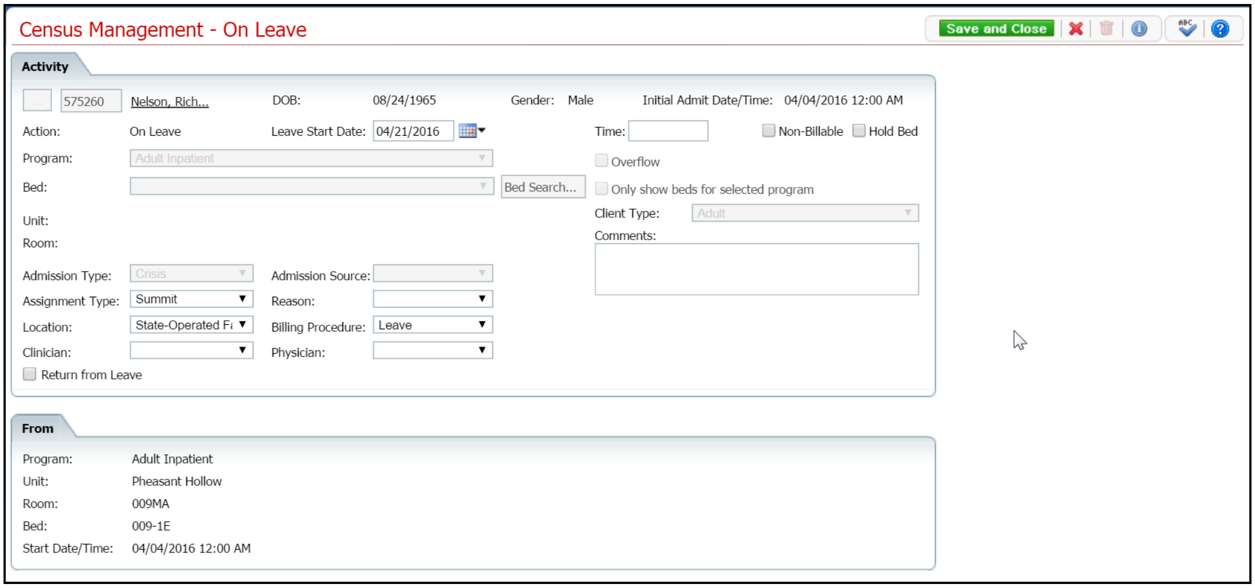


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

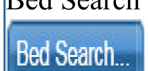
Field	Description
Activity	
	Click this button to display the *Client Search* window. Tell me how.. (See page 112).
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Initial Admit Date/Time	Identifies the initial admission date and time for this visit.
Action	Identifies the action you are taking for the client. The *Action* should be *Discharge*.
Non-Billable	Check to identify the admission is non-billable.
Hold Bed	The check box is disabled.
Program	Identifies the program the client was enrolled in for this visit. Click the **drop down arrow** to change the program.
Overflow	Identifies to hold the bed for the client. The check box is disabled.
Bed	Identifies the bed the client was occupying. Click the **drop down arrow** to change the bed selection.
Unit	Identifies the unit where the client is currently residing.

Field	Description
Client Type	Identifies the client type. Options are: • Adult • Adolescent • Child The field is disabled.
Room	Identifies the room this client is occupying.
Discharge Type*	Identifies the reason for the discharge.
Comments	Enter comments as needed for the discharge. You can enter an unlimited number of characters in this field. You can run spell check on the comments you enter. Tell me how... (See page 121)
Admission Type	Identifies whether the admission was Crisis or Non Crisis. This field is disabled.
Admission Sourc	Identifies the source of the admission. This field is disabled.
Assignment Typ	Assignment type is a customizable set of categories that can be used by each organization as needed. This field is disabled.
Reason	Identifies the reason for the *Discharge*.
Location	Identifies the location of the facility. This field is disabled.
Billing Procedur	Identifies the procedure code to used for billing for the services for this visit. This field is disabled.
From	
Program	Identifies the program the client is being discharged from.
Unit	Identifies the unit the client is being discharged from.
Room	Identifies the room the client is being discharged from.
Bed	Identifies the bed the client is being discharged from
Start Date/Time	Identifies the date and time the client was admitted for this visit.

Census Management On Leave Page Field Definition

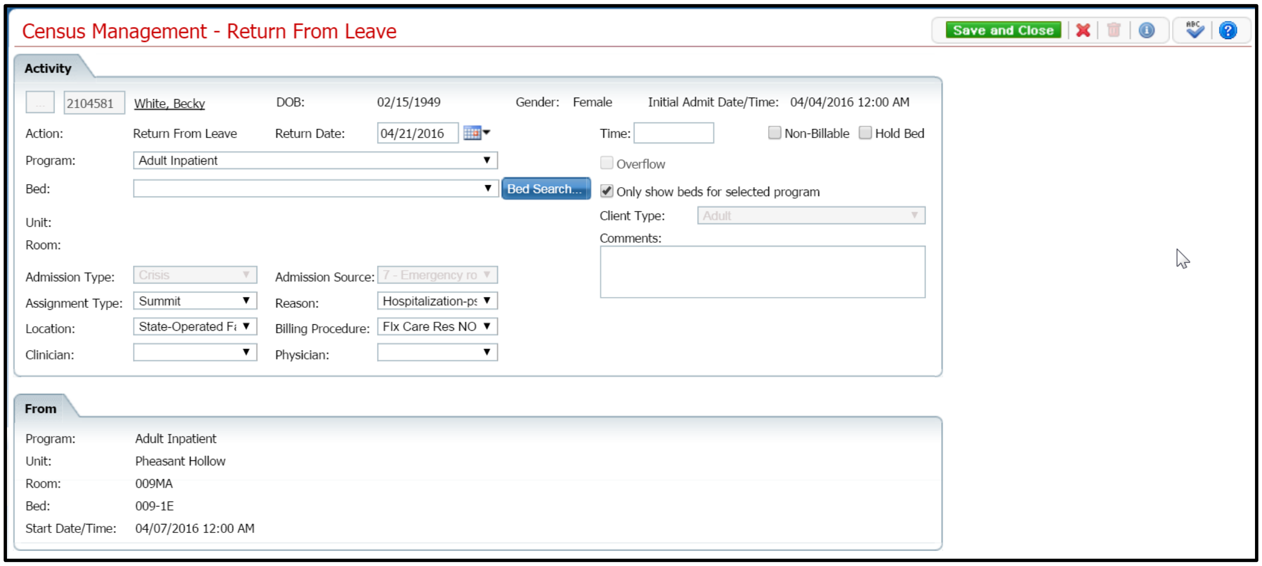


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
	Click on the button to search for a client. Tell me how... (See page 112)
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Initial Admit Date/Time	Displays the date and time of the client's initial admission.
Action	Identifies the action you are taking for the client. It should display *On Leave* for this procedure.
Leave Start Date*	Identifies the date the client's leave begins. Defaults to the current day's date. Use the calendar icon to change the date.
Non-Billable	Check to identify the admission is non-billable.
Hold Bed	This field is disabled.
Program	Identifies the program the client is being admitted to. Click the drop down arrow to change the program.
Overflow	This field is disabled.
Bed	Identifies the bed the client is being admitted to. This field is disabled.
Bed Search button 	Click the **Bed Search** button to search for a bed. Tell me how... (See page 111)
Only show beds for selected program	Check the options to ensure only beds available for this program are displayed. This field is disabled.
Unit	Identifies the unit where the client is being admitted. This field is disabled.

Field	Description
Client Type	Identifies the client type. Options are: • Adult • Adolescent • Child This field is disabled.
Room	Identifies the room selected from the bed search. This field is disabled.
Comments	Enter comments as needed for the action. You can enter unlimited number of characters. You can run spell check on the text you enter in this field. Tell me how... (See page 121)
Admission Type	Select whether the admission is Crisis or Non Crisis. This field is disabled.
Admission Source	Identifies the source of the admission. Select from a lengthy list of sources. This field is disabled.
Assignment Type	Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Identifies the presenting reason for the admission.
Location	Identifies the location of the facility.
Billing Procedure	Identifies the procedure code to use for billing for the services.
From	
Program	Identifies the program the client is being set on leave from.
Unit	Identifies the unit the client is being set on leave from.
Room	Identifies the room the client is being set on leave from.
Bed	Identifies the bed the client is being set on leave from
Start Date/Time	Identifies the date and time the client was admitted.

Census Management - Return from Leave Page Field Definitions

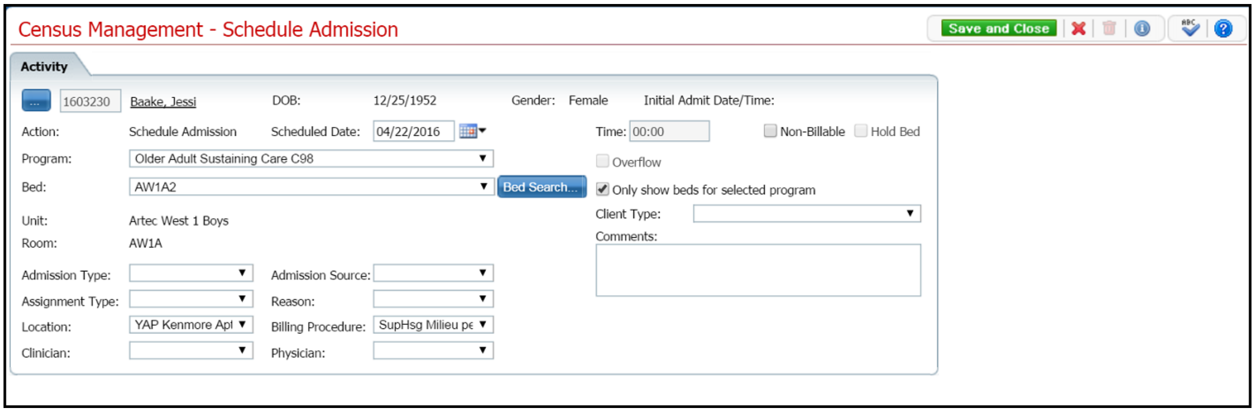


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
	Click on the button to search for a client. Tell me how... (See page 112)
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Initial Admit Date/Time	Displays the date and time of the client's initial admission.
Action	Identifies the action you are taking for the client. It should display *Return From Leave* for this procedure.
Return Date	Identifies the date the client returns from leave. Defaults to the current day's date. You cannot set a date in the past or the future.
Non-Billable	Check to identify the admission is non-billable.
Hold Bed	This field is disabled.
Program	Identifies the program the client is being returned to. Click the drop down arrow to change the program.
Overflow	This field is disabled.
Bed*	Identifies the bed the client is returning to. Click the drop down arrow to change the bed selection.
Bed Search button 	Click the **Bed Search** button to search for a bed. Tell me how... (See page 111)
Only show beds for selected program	Check the options to ensure only beds available for this program are displayed.
Unit	Identifies the unit where the client is admitted.

Field	Description
Client Type	Displays the client's type. Options are: • Adult • Adolescent • Child This field is disabled.
Room	Identifies the room selected from the bed search.
Comments	Enter comments as needed for the return from leave. You can enter an unlimited number of characters. You can run spell check on the text that you enter. Tell me how... (See page 121)
Admission Type	Identifies whether the admission type was Crisis or Non Crisis. This field is disabled.
Admission Source	Identifies the source of the admission. This field is disabled.
Assignment Type	Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Identifies the presenting reason for the admission.
Location	Identifies the location of the facility.
Billing Procedure	Identifies the procedure code to use for billing for the services.
From	
Program	Identifies the program the client is being set on leave from.
Unit	Identifies the unit the client is being set on leave from.
Room	Identifies the room the client is being set on leave from.
Bed	Identifies the bed the client is being set on leave from.
Start Date/Time	Identifies the date and time the client was admitted.

Census Management - Schedule Admission Page Field Definitions

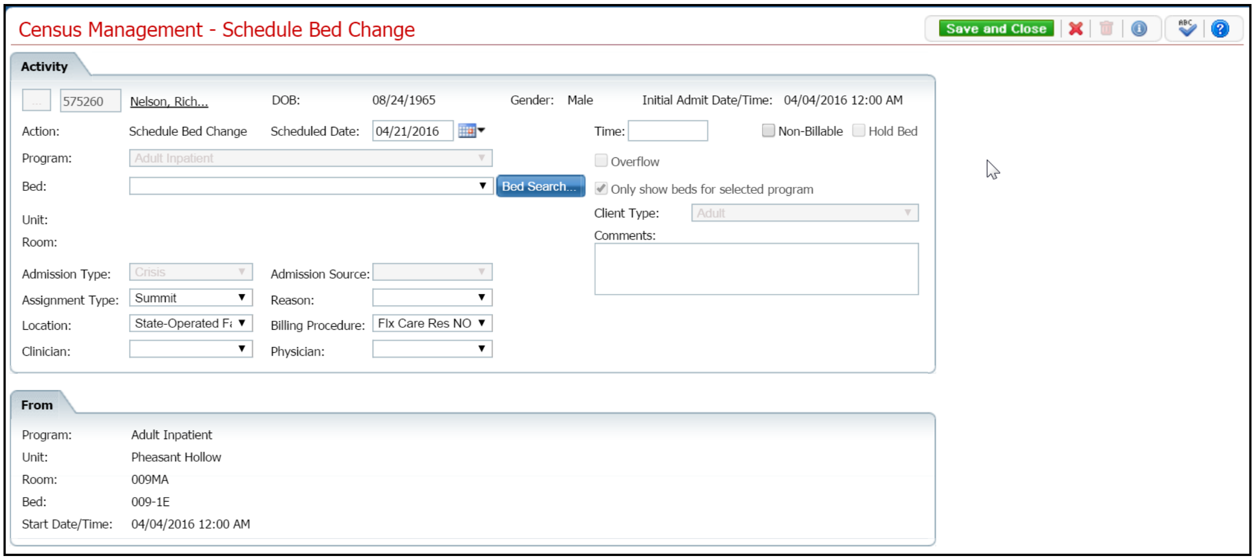


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
	Opens the *Client Search* window. Tell me how... (See page 112)
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Initial Admit Date/Time	Displays the client's first admission date and time, if there is one.
Action	Identifies the action you are taking for the client. For this procedure, it should display *Schedule Admission*.
Scheduled Date Time	Select the date you expect to admit the client. Defaults to the current day's date.
Non-Billable	Select the check box to identify the admission is non-billable.
Hold Bed	The check box is disabled.
Program	Identifies the program the client is enrolled in.
Overflow	What is this???
Bed	Identifies the bed you selected from the *Bed Census* page for this admission.
Bed Search button 	To search for a different bed, click the **Bed Search** button. Tell me how... (See page 114)
Only show beds for selected program	Identifies that you want only beds that "belong" to the selected program to be displayed.
Unit	Identifies the unit where the client is being scheduled for admission.
Client Type*	Identifies whether the client is: • Adult • Adolescent • Child

Field	Description
Room	Identifies the room selected from the bed search.
Comments	Enter comments as needed for the admission. You can enter an unlimited number of characters in this field.
Admission Type*	Select whether the admission is Crisis or Non Crisis.
Admission Source	Identifies the source of the admission. Select from the drop-down list..
Assignment Type	Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Identifies the reason for the admission.
Location	Identifies the location of the facility.
Billing Procedure	Identifies the procedure code to use for billing for the services.

Census Management Schedule Bed Change Field Definitions

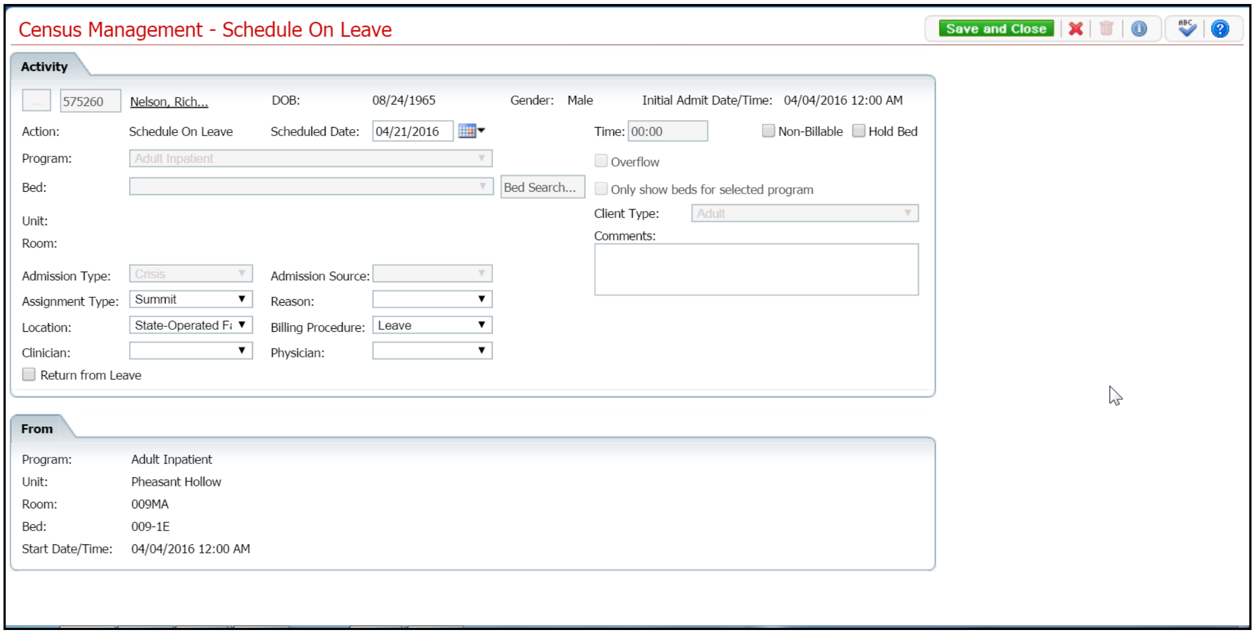


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
	Click on the button to search for a client. Tell me how... (See page 112)
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Action	Identifies the action you are taking for the client.
Schedule Date Time	Select the date and time when you plan to move the client to a different bed.
Non-Billable	Check to identify the admission is non-billable.
Hold Bed	This field is disabled.
Program	Identifies the program the client is admitted to.
Overflow	This field is disabled.
Bed	Identifies the bed you are moving the client to. Click the drop down arrow to change the bed selection.
Bed Search button 	Click the **Bed Search** button to search for a bed. Tell me how... (See page 111)
Only show beds for selected program	Identifies that when using the *Bed Search* button, only beds that belong to the selected program are displayed.
Unit	Identifies the unit where the client is admitted.
Client Type	Identifies the client type. Options are: • Adult • Adolescent • Child
Room	Identifies the room the client is currently occupying.

Field	Description
Comments	Enter comments as needed for the admission. You can enter an unlimited number of characters. You can run spell check on the text you enter in this field. Tell me how... (See page 121)
Admission Type	Identifies the admission type selected during admission.
Admission Source	Identifies the source of the admission selected when the client was admitted.
Assignment Type	Assignment type is a customizable set of categories that can be used by each organization as needed. If this information changes with the bed change, select a new option.
Reason	Identifies the presenting reason for the admission. If this information changes with the bed change, select a new option.
Location	Identifies the location of the facility. If this information changes with the bed change, select a new option.
Billing Procedure	Identifies the procedure code to use for billing for the services. If this information changes with the bed change, select a new option.
From	
Program	Identifies the program the client is currently enrolled in.
Unit	Identifies the unit where the client currently resides.
Room	Identifies the room where the client currently resides.
Bed	Identifies the bed where the client currently resides.
Start Date/Time	Identifies the date and time when the client was admitted to the current room.

Census Management - Schedule Client On Leave Field Definitions

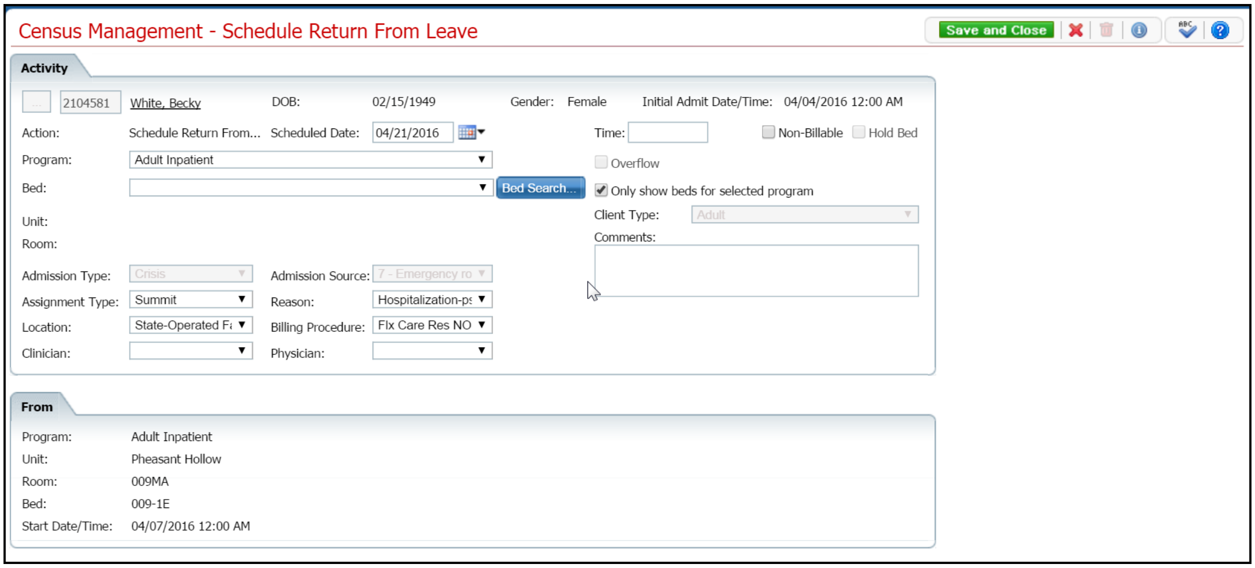


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
	Click on the button to search for a client. Tell me how... (See page 112)
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Initial Admit Date/Time	Displays the date and time of the client's initial admission.
Action	Identifies the action you are taking for the client. It should display *Schedule On Leave* for this procedure.
Scheduled Date	Identifies the date the client's leave begins. Defaults to the current day's date. Use the calendar icon to select a day in the future.
Non-Billable	Check to identify the admission is non-billable.
Hold Bed	Select the check box to identify you want to hold the bed for the client.
Program	Identifies the program the client is being admitted to. This field is disabled.
Overflow	This field is disabled.
Bed	Identifies the bed the client is occupying. This field is disabled.
Bed Search 	If you need to change the client's bed for when they return from leave, click the *Bed Search* button. Tell me how... (See page 111) This field is disabled.

Field	Description
Only show beds for selected program	Check the option to ensure only beds available for this program are displayed.
Unit	Identifies the unit where the client is currently admitted.
Client Type	Identifies the client type. Options are: • Adult • Adolescent • Child This field is disabled.
Room	Identifies the room selected from the bed search.
Comments	Enter comments as needed for the schedule on leave. You can enter an unlimited number of characters. You can run spell check on the text that you enter. Tell me how... (See page 121)
Admission Type	Select whether the admission is Crisis or Non Crisis. This field is disabled.
Admission Source	Identifies the source of the admission. Select from a lengthy list of sources. This field is disabled.
Assignment Type	Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Identifies the presenting reason for the leave.
Location	Identifies the location of the facility.
Billing Procedure	Identifies the procedure code to use for billing for the services.
From	
Program	Identifies the program the client is being set on leave from.
Unit	Identifies the unit the client is being set on leave from.
Room	Identifies the room the client is being set on leave from.
Bed	Identifies the bed the client is being set on leave from
Start Date/Time	Identifies the date and time the client was admitted.

Census Management - Schedule from Leave Page Field Definitions

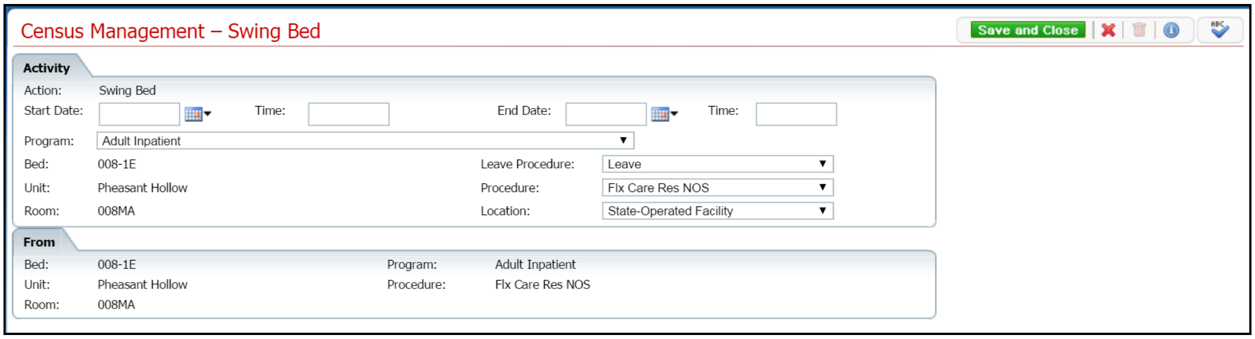


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
	Click on the button to search for a client. Tell me how... (See page 112)
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Initial Admit Date/Time	Displays the date and time of the client's initial admission.
Action	Identifies the action you are taking for the client. It should display *Return From Leave* for this task.
Return Date	Identifies the date the client returns from leave. Defaults to the current day's date. Use the calendar icon to enter a different date in the future.
Non-Billable	Check to identify the admission is non-billable.
Hold Bed	This field is disabled.
Program	Identifies the program the client is being returned to. Click the drop down arrow to change the program.
Overflow	This field is disabled.
Bed*	Identifies the bed the client is returning to. Click the drop down arrow to change the bed selection.
Bed Search 	If you need to change the client's bed for when they return from leave, click the *Bed Search* button. Tell me how... (See page 111)
Only show beds for selected program	Check the options to ensure only beds available for this program are displayed.
Unit	Identifies the unit where the client is admitted.

Field	Description
Client Type	Displays the client's type. Options are: • Adult • Adolescent • Child This field is disabled.
Room	Identifies the room selected from the bed search.
Comments	Enter comments as needed for the return from leave. You can enter an unlimited number of characters. You can run spell check on the text that you enter. Tell me how... (See page 121)
Admission Type	Identifies whether the admission type was Crisis or Non Crisis. This field is disabled.
Admission Source	Identifies the source of the admission. This field is disabled.
Assignment Type	Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Identifies the presenting reason for the admission.
Location	Identifies the location of the facility.
Billing Procedure	Identifies the procedure code to use for billing for the services.
From	
Program	Identifies the program the client is being set on leave from.
Unit	Identifies the unit the client is being set on leave from.
Room	Identifies the room the client is being set on leave from.
Bed	Identifies the bed the client is being set on leave from
Start Date/Time	Identifies the date and time the client was admitted.

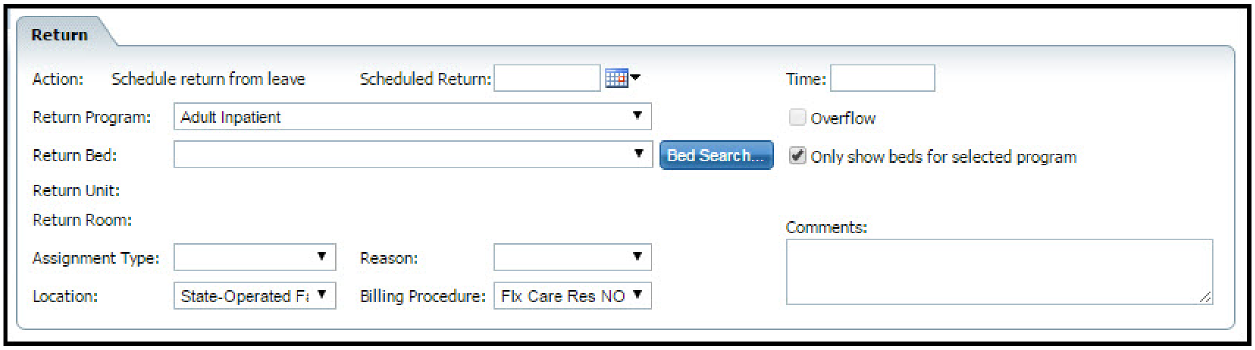
Census Management - Swing Bed Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Activity	
Action	Identifies the action being committed on the page. For this procedure, *Swing Bed* should be displayed.
Start Date	Identifies the date when the swing actions take place. Choose a date from the calendar icon.
Time	Identifies the time of day the swing changes take place.
End Date	Identifies the date when the swing changes change back to its previous settings.
Time	Identifies the time on the End Date when the swing changes change back.
Program	Identifies the program the bed belongs to.
Bed	Identifies the bed being changed.
Leave Procedure	Identifies the procedure code used to indicate when a client is leaving the bed.
Unit	Identifies the unit where the bed is located.
Procedure	Identifies the procedure code used to represent a daily service for the bed.
Room	Identifies the room where the bed being changed is located.
Location	Identifies the location of the unit, room and bed.
From	
Bed	Identifies the bed details before being changed.
Program	Identifies the bed details before being changed.
Unit	Identifies the bed details before being changed.
Procedure	Identifies the bed details before being changed.
Room	Identifies the bed details before being changed.

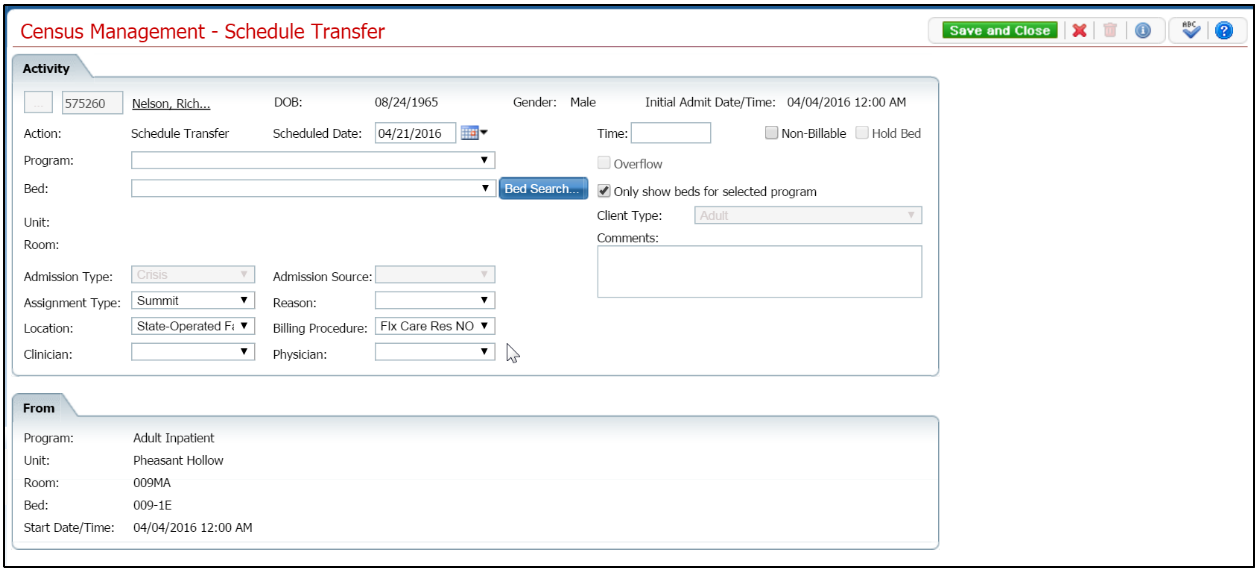
Census Management Schedule Return From Leave Return Section Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Action	Identifies the action you are taking for the client. It should display *Schedule return from leave* for this procedure.
Scheduled Return Time	Identifies the date the client is expected to return from leave. Defaults to the current day's date. Use the calendar icon to select a day in the future.
Return Program	Identifies the program the client is currently admitted to. Use the drop down arrow to change if needed.
Overflow	???
Return Bed	Identifies the client's currently occupied bed. Change if needed.
Bed Search 	If you need to change the client's bed for when they return from leave, click the *Bed Search* button. Tell me how... (See page 111)
Only show beds for selected program	Check to view only beds for the selected Return Program when you search for a bed.
Return Unit	Identifies the unit where the client will return from leave.
Return Room	Identifies the room where the client will return from leave.
Assignment Type	Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Identifies the reason for the client's stay in the unit.
Comments	Enter comments as needed for this action. You can enter an unlimited number of characters. You can run spell check on the text you enter. Tell me how... (See page 121)
Location	Identifies the location of the facility.
Billing Procedure	Identifies the procedure code used for billing for admission to the bed.

Census Management - Schedule Transfer Field Definitions

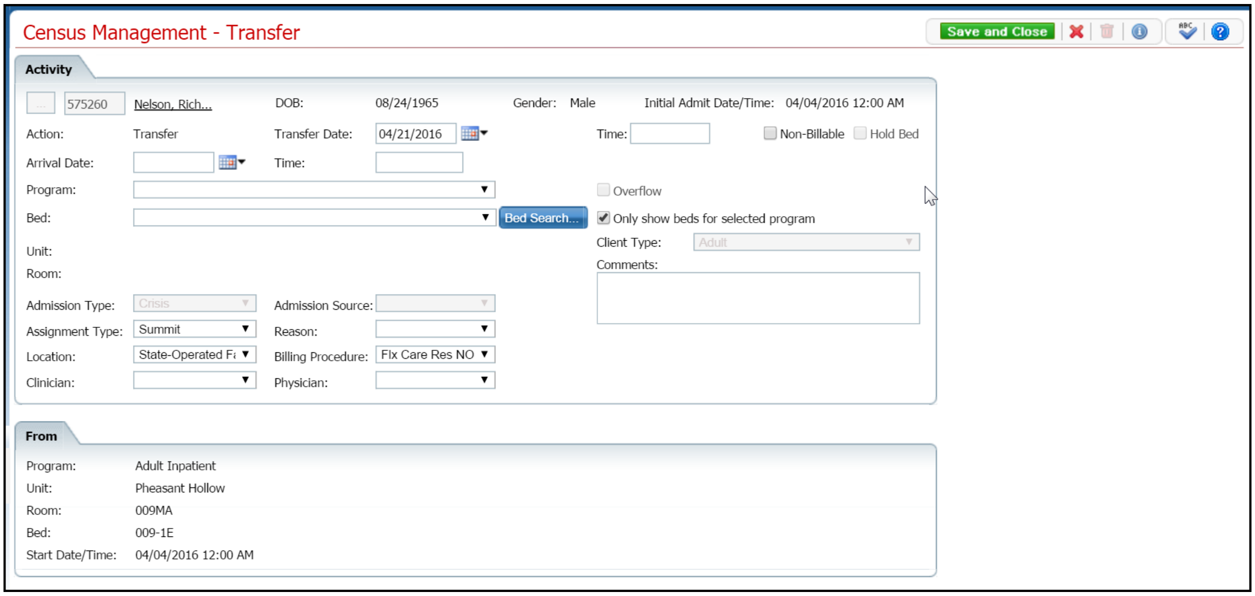


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
	Click on the button to search for a client. Tell me how... (See page 112)
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Action	Identifies the action you are taking for the client. For this procedure, the *Action* should be *Schedule Transfer*.
Scheduled Date	Identifies the date the transfer is scheduled to occur.
Time	Identifies the time the scheduled transfer should occur.
Non-Billable	Check to identify whether the scheduled transfer is non-billable.
Hold Bed	This field is disabled.
Program*	Identifies the program the client is scheduled to be transferred to. Click the drop down arrow to change the program.
Overflow	This field is disabled.
Bed	Identifies the bed the client is being transferred to. Click the drop down arrow to change the bed selection.
Bed Search button 	Click the **Bed Search** button to select a new bed to transfer the client to. Tell me how... (See page 116)
Only show beds for selected program	Identifies whether only beds available for the selected program are displayed during the bed search.
Unit	Identifies the unit where the client is being admitted.

Field	Description
Client Type*	Identifies the client type. Options are: • Adult • Adolescent • Child This field is disabled.
Room	Identifies the room selected from the bed search.
Comments	Enter comments as needed for the admission. You can enter an unlimited number of characters.
Admission Type	Displays whether the admission was Crisis or Non Crisis. This field is disabled.
Admission Source	Identifies the source of the admission. This field is disabled.
Assignment Type	Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Identifies the reason for the transfer.
Location	Identifies the location of the facility.
Billing Procedure	Identifies the procedure code to use for billing for the services.

Census Management - Transfer Page Field Definitions

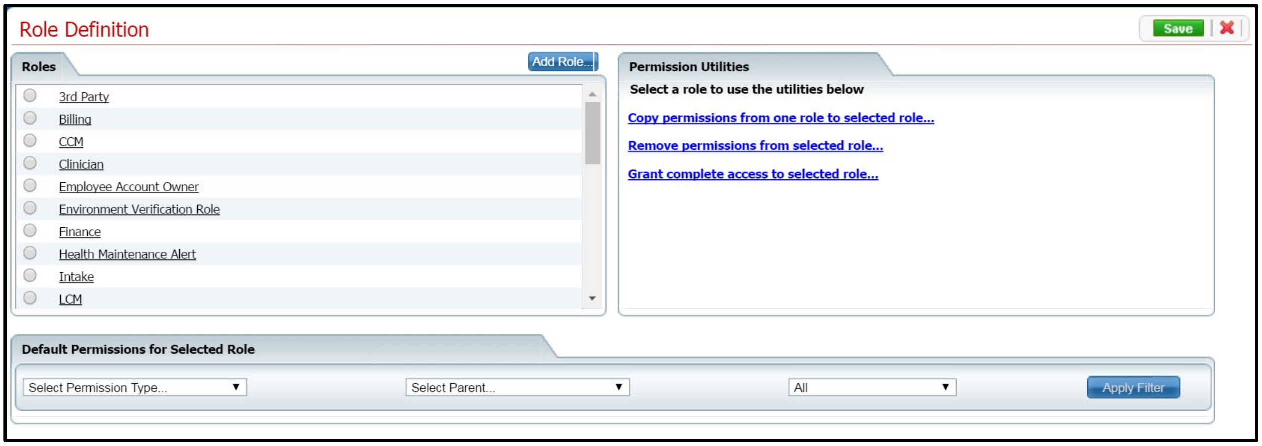


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
	Click on the button to search for a client. Tell me how... (See page 112)
Client ID	The client's ID appears from the client's registration information.
Client name	The client's name is displayed last name and first name.
DOB	The client's date of birth is displayed.
Gender	The client's gender is displayed.
Initial Admit Date/Time	Identifies the client's initial admit date and time for this visit.
Action	Identifies the action you are taking for the client. For this procedure, the Action should be *Transfer*.
Transfer Date	Identifies the date the transfer is occurring. Defaults to the current day's date. Use the calendar icon to select a different date.
Non-Billable	Check to identify the transfer is non-billable.
Hold Bed	This check box is disabled.
Arrival Date Time*	Select the date when the client should arrive at the new location.
Program*	Identifies the program the client is being transferred to. Click the drop down arrow to change the program.
Overflow	This check box is disabled.
Bed	Identifies the bed the client is being transferred to. Click the drop down arrow to change the bed selection.
Bed Search button 	Click the **Bed Search** button to select a new bed to transfer the client to. Tell me how... (See page 116)

Field	Description
Only show beds for selected program	Identifies whether you want only beds available for the selected program to be displayed when you complete a bed search.
Unit	Identifies the unit where the client is being transferred.
Client Type*	Identifies the client type. Options are: • Adult • Adolescent • Child This field is disabled.
Room	Identifies the room selected from the bed search.
Comments	Enter comments as needed for the admission. You can enter an unlimited number of characters. You can run spell check on the text in this field. Tell me how... (See page 121)
Admission Type	Displays whether the admission was Crisis or Non Crisis.
Admission Source	Identifies the source of the admission.
Assignment Type	Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Identifies the reason for the transfer.
Location	Identifies the location of the facility.
Billing Procedure	Identifies the procedure code to use for billing for the bed service.
From	
Program	Identifies the program the client was transferred from.
Unit	Identifies the unit where the client was transferred from.
Room	Identifies the room where the client was transferred from.
Bed	Identifies the bed where the client was transferred from.
Start Date/Time	Identifies the date and time of the transfer.

Role Definitions Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Roles	
Roles	All roles defined in the system. A role is a collection of permissions that are assigned to uses sign on account. The role assigns permission to each staff member who will use the system. Permissions are assigned to staff to give them permission to access or limit access to list pages, screens and windows in SmartCare.
Add Role 	Click the **Add Role** button to add a new role to the system and assign permission to that role.
Default Permissions for Selected Role	
Select Permission Type	Use the drop down arrow to select the type of permissions you want to assign to a role. Go through all permission types to ensure you assign permissions for all interface features.
Select Parent	Use this drop down to select the next level of user interface to assign permissions to the role you are setting up,,
All drop down	In the *All* drop down, you are limiting the permissions you are viewing by setting this option to few all settings, only granted settings or only denied settings. By selecting All, you can change the settings that do not fit the permissions you are created.
Permission Utilities	
Selected Role	This field appears if you have selected a role in the *Roles* section.
Copy permissions from one role to selected role	Click this hyperlink to copy the permissions set up for a role you select to a new role you are setting up. Then, if the new role is slightly different, you can edit the role and remove or add new permissions.
Remove permissions from selected role	Click this hyperlink to remove permissions from the selected role.
Grant complete access to the selected role	Use this hyperlink to allow all access to the selected role. Again, you can edit the permissions once you create the new role.

Status Actions

When the Status is...	Then you can perform this action...
Occupied	• Bed Change - use this procedure (See page 14) starting with step 4. • Transfer - use this procedure (See page 61) starting with step 5. • On Leave - use this procedure (See page 42) starting with step 5. • Discharge - use this procedure (See page 28) starting with step 5. • Schedule Bed Change - use this procedure (See page 18) starting with step 5. • Schedule Transfer - use this procedure (See page 58) starting with step 5. • Schedule On Leave - use this procedure (See page 52) starting with step 5. **Note:** If all of these actions are not available, it means a client has another action performed which creates a new status in the future. Refer to View Client Visit Information (See page 66).
On Leave	• Return from Leave - use this procedure (See page 38) starting with step 5. • Schedule Return from Leave - use this procedure (See page 47) with step 5. • Discharge - use this procedure (See page 33) with step 5.
Discharged	No actions are available.
Scheduled Bed Change	• Transfer - use this procedure (See page 61) starting with step 5. • Schedule Bed Change - use this procedure (See page 18) starting with step 5. • Schedule On Leave - use this procedure (See page 52) starting with step 5.

Inpatient Activity Details

Inpatient Activity Details

You can access and use the *Inpatient Activity Details* page from either *Bed Census* or *Bedboard* list pages:

Access from Bed Census (See page 100)

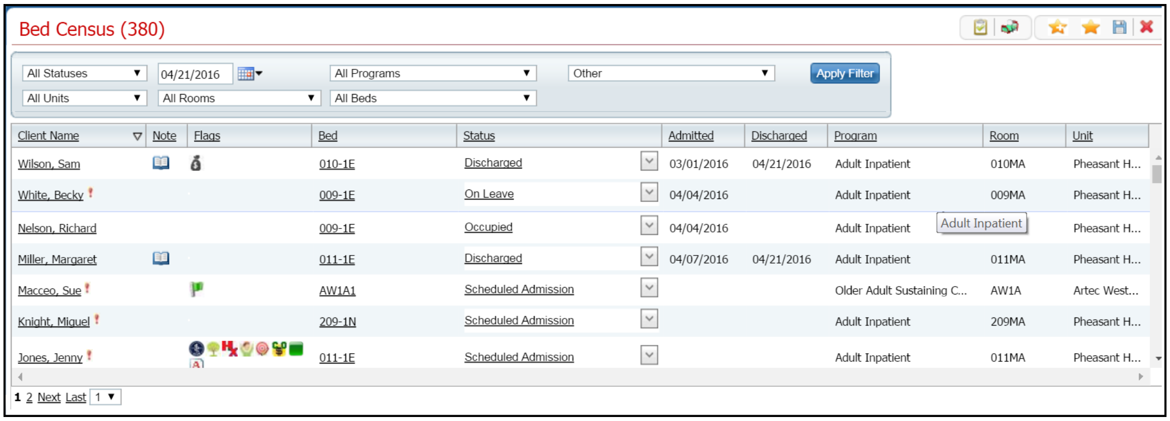
On the *Inpatient Activity Details* page, you can perform new activities, change and delete records from a client's activity details list. Only certain Actions are available depending on the client's status. Refer to the following table for more information:

Status	Available Actions
Occupied	• Bed Change - use this procedure (See page 14) starting with step 4. • Transfer - use this procedure (See page 61) starting with step 5. • On Leave - use this procedure (See page 42) starting with step 5. • Discharge - use this procedure (See page 28) starting with step 5. • Schedule Bed Change - use this procedure (See page 18) starting with step 5. • Schedule Transfer - use this procedure (See page 58) starting with step 5. • Schedule On Leave - use this procedure (See page 52) starting with step 5. **Note:** If none of these actions is available, it means the client has another action performed which creates a new status in the future. Refer to View Client Visit Information (See page 66).
On Leave	• Return from Leave - use this procedure (See page 38) starting with step 5. • Schedule Return from Leave - use this procedure (See page 47) with step 5. • Discharge - use this procedure (See page 33) with step 5.
Discharged	No actions are available.
Returned from Leave	No actions are available.
Scheduled Admission	• Admit - use this procedure starting with step 7. • Cancel Admission - use this procedure starting with step 5.
Scheduled Bed Change	• Transfer - use this procedure starting with step 5. • Schedule Bed Change - use this procedure starting with step 5. • Schedule On Leave - use this procedure starting with step 5.
Scheduled Return from Leave	• Return from Leave - use this procedure starting with step 5. • Schedule Bed Change - use this procedure starting with step 5. • Schedule Transfer - use this procedure starting with step 5. • Schedule On Leave - use this procedure starting with step 5.

Why can't I access these screens? (See page 127)

Access Inpatient Activity Details from Bed Census

1. Make sure the *Bed Census* list page is displayed. Tell me how... View field definitions (See page 69).



2. Filter the list to determine the records that are displayed. Tell me how...

3. Find the client you are working with. Tell me how... (See page 112)

4. To display the *Inpatient Activity Details* page, click on the:

- **hyperlinked status** - to display the *Inpatient Activity Details* page with the *Activity Details* tab active.

-or -

- **open book** icon in the *Note* column - to display the *Inpatient Activity Details* page with the *Visit* tab active.

The *Inpatient Activity Details* page is displayed.

Why can't I access these screens? (See page 127)

Access Inpatient Activity Details from the Bedboard Page

1. Display the *Bedboard* list page. Tell me how... View field definitions.

2. Filter the list to display the information you want. Tell me how...

3. Find the client you are working with. **Tip:** Click the **Client Name** column heading to display the names in alphabetical order.

4. To display the *Inpatient Activity Details* page, click on the:

- **hyperlinked status** - to display the *Inpatient Activity Details* page with the *Activity Details* tab active.

-or -

- **open book** toolbar item in the column to the right of the drop-down arrows - to display the *Inpatient Activity Details* page with the *Visit* tab active.

The *Inpatient Activity Details* page is displayed.

Why can't I access these screens? (See page 127)

Modify Visit Information

You can modify visit information for a client. You can modify the following information:

- Emergency Room Arrival Date
- Emergency Room Arrival Time
- Emergency Departure Date
- Emergency Room Departure Time
- Admit Decision Date
- Admit Decision Time
- Client Type
- DRG Code
- Admission Type
- Admission Source

To Modify Visit Information

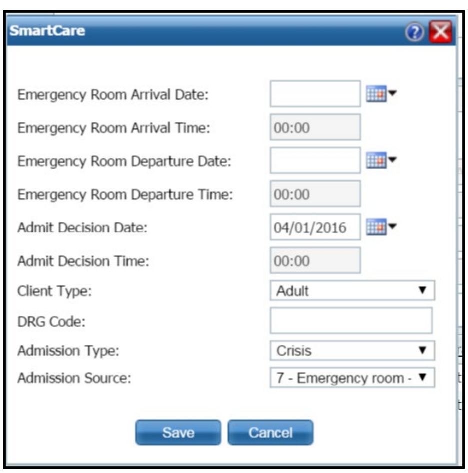
1. Display the *Inpatient Activity Details* page for the client.

   Access from Bed Census (See page 100)

2. Make sure the **Visit** tab is active.

3. In the *Visit Information* section, click the **Modify** button.

   A pop-up window is displayed.



4. Type or change information in the fields. View field definitions (See page 107).

5. When you have made all your changes, click the **Save** button.

   The *Inpatient Activity Details* page is displayed with the *Visit* tab active.

Why can't I access these screens? (See page 127)

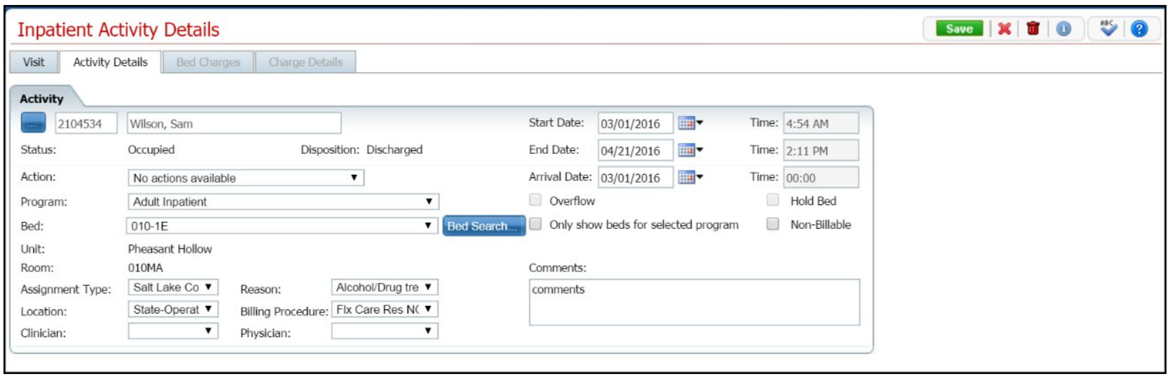
Change an Activity

You can change an activity completed on a client's visit on the client's account. However, the status of the existing activity determines what changes you can make on the visit.

1. Find the client you want to work with on the list page.

2. Click the **hyperlinked status** in the *Status* column.

   The *Inpatient Activity Details* page with the *Activity Details* tab active is displayed.



3. Click the **drop down arrow** in the *Action* field.

   The permissible actions for this status are displayed in the drop down box. Shown below are the actions available for each status.

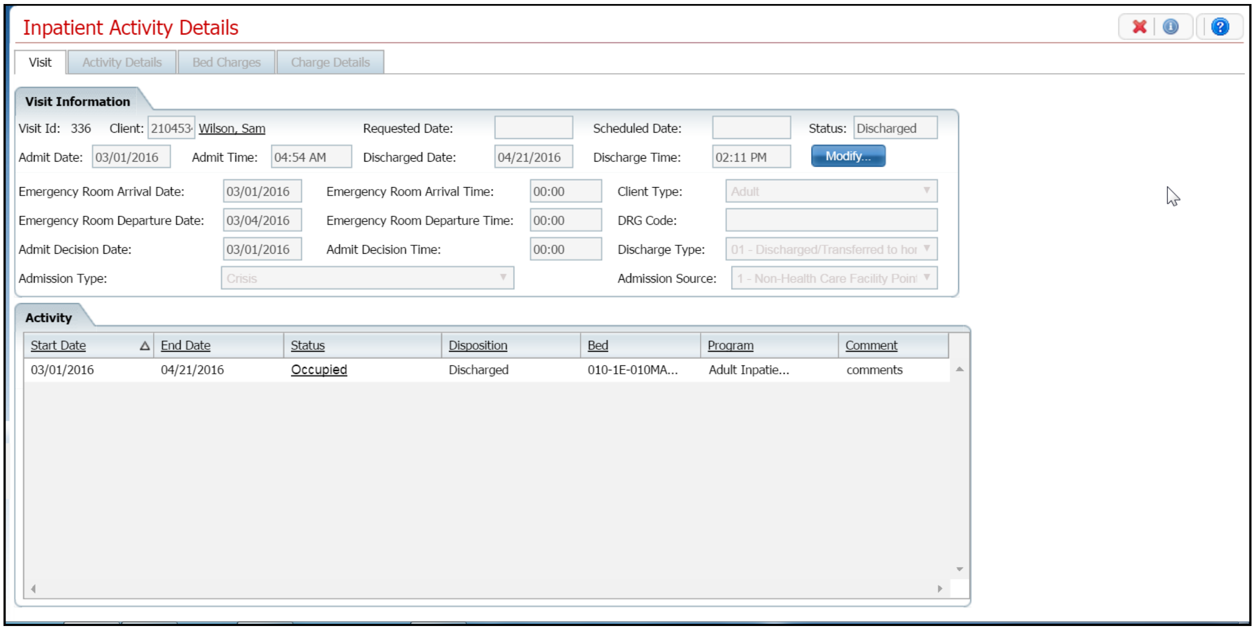
If the Status is...	You can perform this action...
Occupied	• Bed Change - use this procedure (See page 14) starting with step 4. • Transfer - use this procedure (See page 61) starting with step 5. • On Leave - use this procedure (See page 42) starting with step 5. • Discharge - use this procedure (See page 28) starting with step 5. • Schedule Bed Change - use this procedure (See page 18) starting with step 5. • Schedule Transfer - use this procedure (See page 58) starting with step 5. • Schedule On Leave - use this procedure (See page 52) starting with step 5. **Note:** If none of these actions is available, it means a client has another future action already performed. Refer to View Client Visit Information (See page 66).

If the Status is...	You can perform this action...
On Leave	• Return from Leave - use this procedure (See page 38) starting with step 5. • Schedule Return from Leave - use this procedure (See page 47) with step 5. • Discharge - use this procedure (See page 33) with step 5.
Discharged	No actions are available.
Returned from Leave	No actions are available.
Scheduled Admission	• Admit - use this procedure (See page 3) starting with step 7. • Cancel Admission - use this procedure (See page 10) starting with step 5.
Scheduled Bed Change	• Transfer - use this procedure (See page 61) starting with step 5. • Schedule Bed Change - use this procedure (See page 18) starting with step 5. • Schedule On Leave - use this procedure (See page 52) starting with step 5.
Scheduled Return from Leave	• Return from Leave - use this procedure (See page 38) starting with step 5. • Schedule Bed Change - use this procedure (See page 18) starting with step 5. • Schedule Transfer - use this procedure (See page 58) starting with step 5. • Schedule On Leave - use this procedure (See page 52) starting with step 5.

Why can't I access these screens? (See page 127)

Field Definitions

Inpatient Activity Details Visit Tab Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Visit Information	
Visit Id	Identifies the unique ID number assigned when the client was admitted for this visit.
Client	Identifies the client's ID.
Client Name	Client's last name and first name.
Requested Date	Identifies the date the admission was requested.
Scheduled Date	Identifies the date the admission was scheduled.
Status	Identifies the current status of the client.
Admit Date	Identifies the date the client was admitted for this visit.
Admit Time	Identifies the time the client was admitted for this visit.
Discharged Date	Identifies the date the client was discharged from the visit.
Discharge Time	Identifies the time the client was discharged from the visit.
Modify button	Click the **Modify** button to edit disabled fields in the *Visit Information* section. Tell me how... (See page 102)
Emergency Room Arrival Date	Identifies the date the client arrived at the emergency room prior to this visit.
Emergency Room Arrival Time	Identifies the time the client arrived at the emergency room prior to this visit.
Client Type	Identifies whether the client is Adult, Adolescent or Child.
Emergency Room Departure Date	Identifies the date when the client left the emergency room.

Field	Description
Emergency Room Departure Time	Identifies the time when the client left the emergency room.
DRG Code	Identifies the Diagnosis Related Group (DRG) code used to classify the services group.
Admit Decision Date	Identifies the date when the decision was made to admit the client.
Admit Decision Time	Identifies the time when the decision was made to admit the client.
Discharge Type	Identifies the reason for the discharge.
Admission Type	Identifies whether the admission is Crisis or Non-crisis.
Admission Source	Identifies the referral source for the admission.
Activity	
Start Date	Identifies the beginning date for an action on this client's visit.
End Date	Identifies the end date for an action on this client's visit.
Status	Identifies the status that defines the action taken on this client's visit.
Disposition	Identifies the status was changed. A new record line is displayed in the *Activity* section.
Bed	Identifies the bed the client was occupying when the action was initiated,
Program	Identifies the program the client is enrolled in for this action.
Comment	Identifies any comments entered for this action for this client.

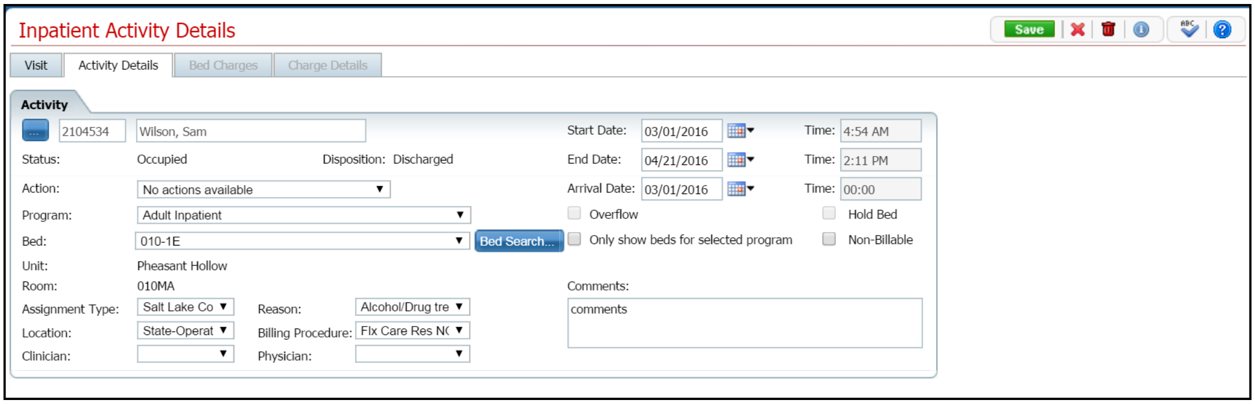
Inpatient Activity Details Visit Tab Modify Window Field Definitions

An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Emergency Room Arrival Date	Identifies the date the client arrived at the emergency room prior to this visit.
Emergency Room Arrival Time	Identifies the time the client arrived at the emergency room prior to this visit.
Emergency Room Departure Date	Identifies the date when the client left the emergency room.
Emergency Room Departure Time	Identifies the time when the client left the emergency room.
Admit Decision Date	Identifies the date when the decision was made to admit the client.
Admit Decision Time	Identifies the time when the decision was made to admit the client.

Field	Description
Client Type	Identifies whether the client is Adult, Adolescent or Child.
DRG Code	Identifies the Diagnosis Related Group (DRG) code used to classify the services group.
Admission Type	Identifies whether the admission is Crisis or Non-crisis.
Admission Source	Identifies the referral source for the admission.

Inpatient Activity Details Page Activity Details Tab Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Activity	
	Click this button to display the *Client Search* window. Tell me how.. (See page 112).
Client ID	Identifies the client's ID number assigned when the client was registered.
Client's Name	Identifies the client's last name, first name.
Start Date Time*	Identifies the date and time of the scheduled admission.
Status	Identifies the current status of the client's visit.
Disposition	If you are applying a new action to the client's status, identifies the previous status.
End Date Time	Identifies the end date and time for the current action.
Action	Identifies the action you are taking on this client's visit. Click the drop down arrow to choose the action.
Arrival Date Time	Identifies the date and time when the client arrived for the action shown in the *Status* field.
Program	Identifies the program the client is enrolled in.
Overflow	What is this???
Hold Bed	Identifies that you want to hold the selected bed for this action on the client's visit.
Bed	Identifies the bed the client is occupying.
Bed Search button 	Click the **Bed Search** button to find a different bed for the client. If you want to view only the beds that are valid for the selected program, click the "Only show beds for selected program" option.
Only show beds for selected program	Identifies whether or not you want to only view the beds that are valid for the selected program.
Non-billable	Identifies that the action is non-billable. This means no service will be created and billed for this action.
Unit	Identifies the unit where the bed is located.
Room	Identifies the room where the bed located.
Assignment Type	Identifies the Assignment type for this action.
Reason	Identifies the reason for the action.
Comments	Enter comments about action. You can enter unlimited number of characters.

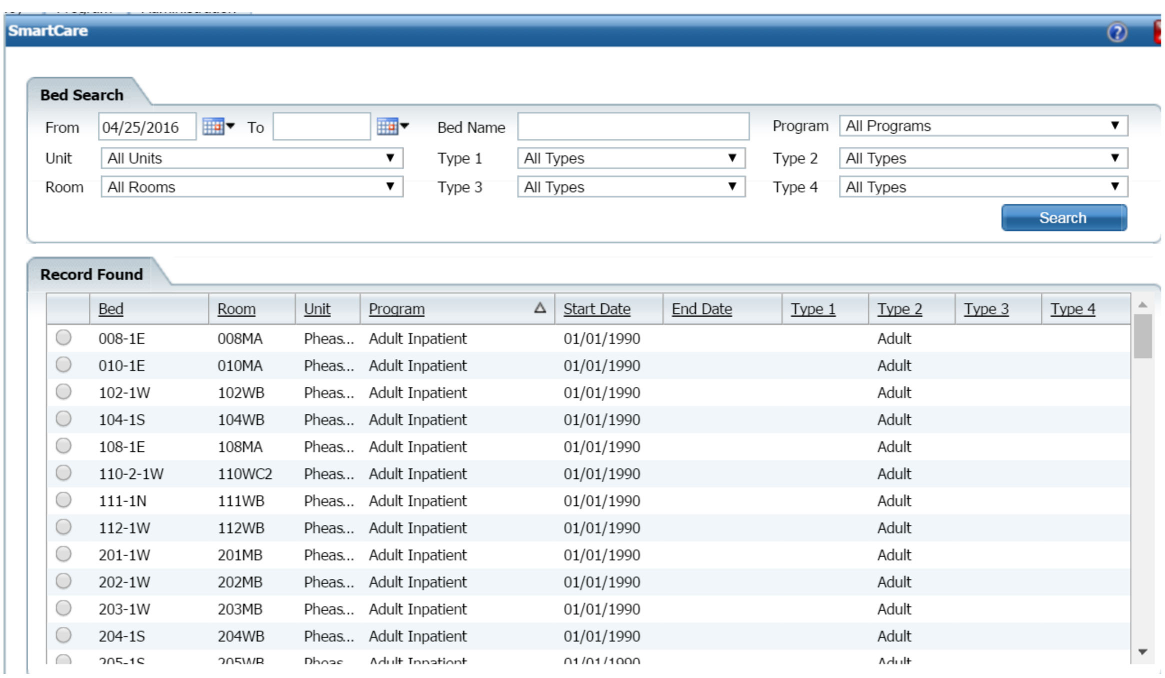
Field	Description
Location*	Identifies the location of the bed.
Billing Procedure*	Identifies the billing code that identifies this action.
Clinician	Identifies the client's clinician.
Physician	Identifies the client's physician.

Search

Search for a Bed

1. In the *Activity* section, click the **Bed Search** toolbar item.

   The *Bed Search* page is displayed. View field definitions (See page 116).



2. Filter the list to determine the records that are displayed. Tell me how... (See page 125)

3. Click the **Search** button to start the search.

   All records which match the search are displayed in the *Record Found* section.

4. Select the **bed** by clicking the radio button to the left of the record you want.

5. Click the **Select** button.

   The *Census Management* page you were working on is re-displayed.

Why can't I access these screens? (See page 127)

Search for a Client

When you click on the drop-down arrow next to *Open* in the *Bed Census List Page*, the *Search for Client* window is displayed. In this window, you search for the client you want to admit. If the client has already been entered in the system, use that client record to complete the admission. If the client is not found, then follow your office's policy for entering the client.

Searching Best Practices

- To avoid duplicate records, use due diligence to ensure the client is not already entered in the system.
- Use the defined search strategy as explained in the procedure below.
- Use more specific searches found in the *Other Search Strategies* section, as needed.
- If no matches are found, assume the client is new and has not been registered in the system. Follow your office policy for registering the client.

To Search for a Client

1. When the *Client Search* window is displayed, complete the **Name Search, SSN Search** and **DOB Search** fields. View field definitions (See page 112).
2. Click the **Broad Search** button.
3. If no client is found, click the **Narrow Search** button.
4. If no client is found, click the **SSN Search** button.
5. If no client is found, click the **DOB Search** button.
6. When using *Other Search Strategies*, enter the information you want to search on and click the blue button to the left of the field to start the search.
7. If a matching record is found, the information is displayed in the *Records Found* tab.

a. Verify that the information that is listed matches the client you are working with.

b. If more than one client is listed, select the open circle to the left of the client line to select the client in the *Records Found* section.

c. Click the **Select** button.

-or-

If no match is found, the client is not entered in the system.

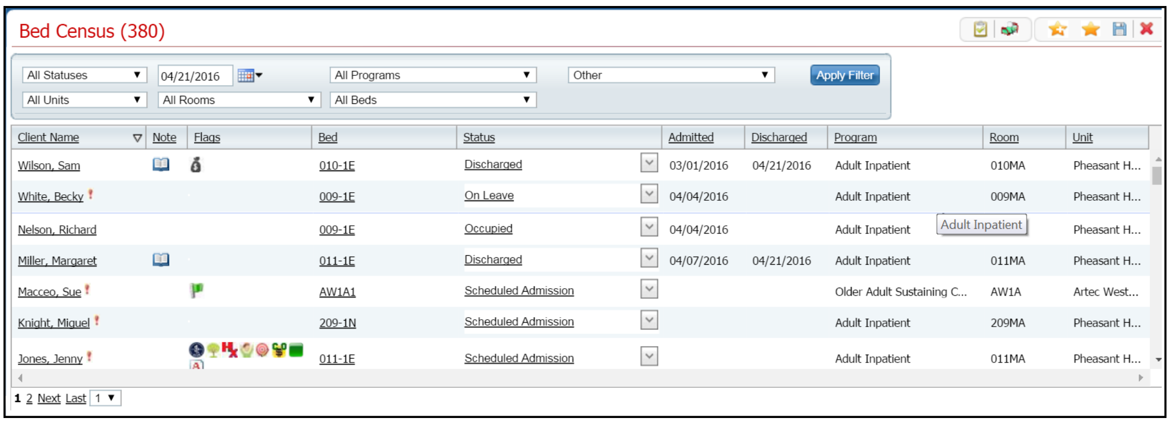
Why can't I access these screens? (See page 127)

Use the Bed Search Toolbar Item to Search for an Open Bed

1. Make sure the *Bed Census* page is displayed. *Tell me how...* View field definitions (See page 69).

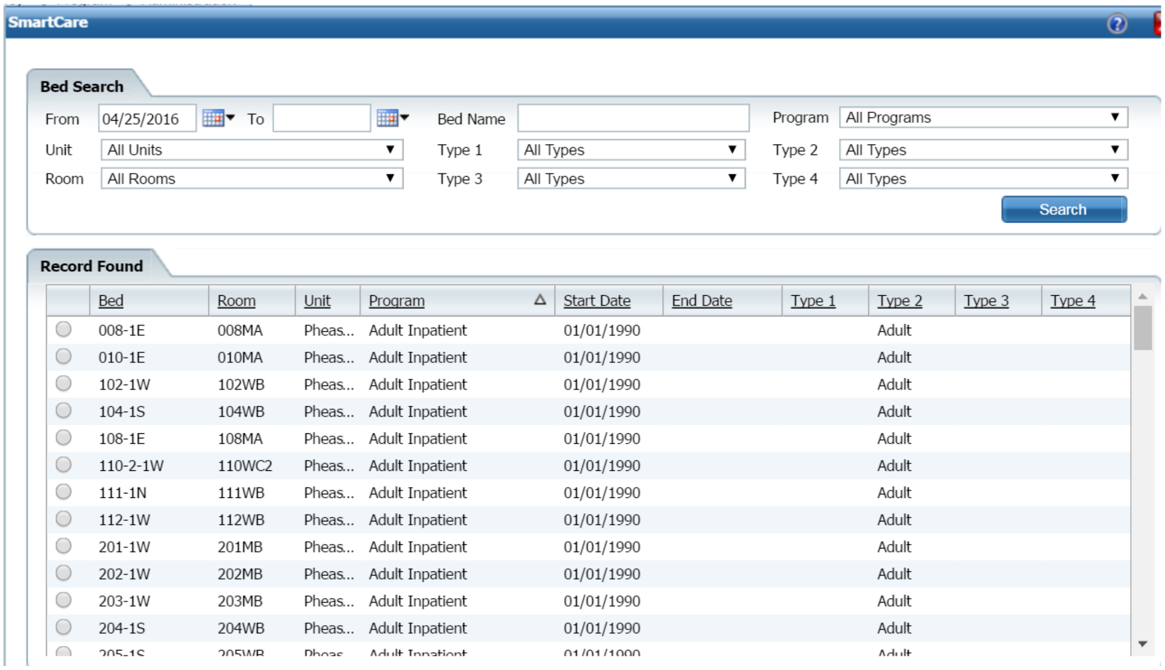
    1. Follow this path: **My Office ▶ Inpatient/Residential ▶ Residential.**

    The *Bed Census (###) List Page* is displayed.



2. On the *Bed Census* list page, click the **Bed Search**  toolbar item.

The *Bed Search* page is displayed. View field definitions (See page 114).



2. Filter the search to limit the records that are displayed. Tell me how... (See page 126)

3. Click the **Search** button to start the search.

   The list of data matching the search is displayed in the *Record Found* section.

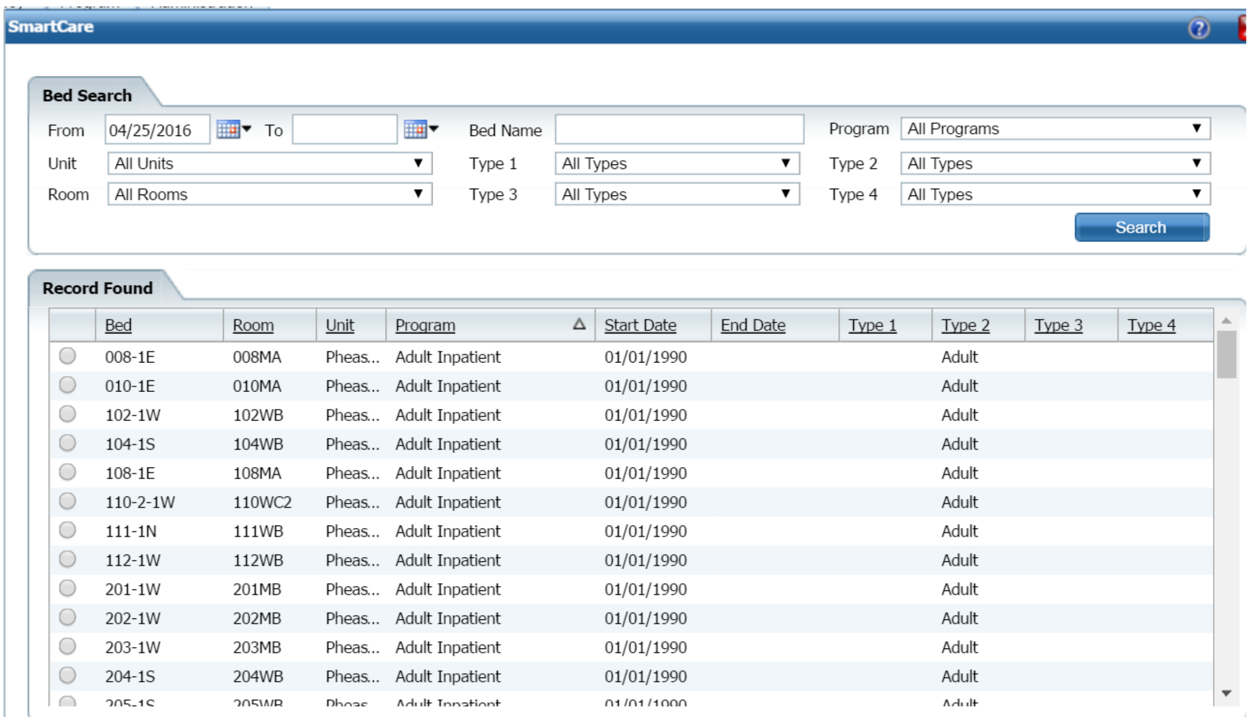
4. Select the bed that you want to admit the client to by clicking the radio button to the left of the record that you want.

5. To admit a client to the bed, click the **Admit** button. Tell me how... (See page 3)

6. To schedule an admission to the bed, click the **Schedule Admission** button. Tell me how... (See page 8)

Why can't I access these screens? (See page 127)

Bed Search Window Field Definitions

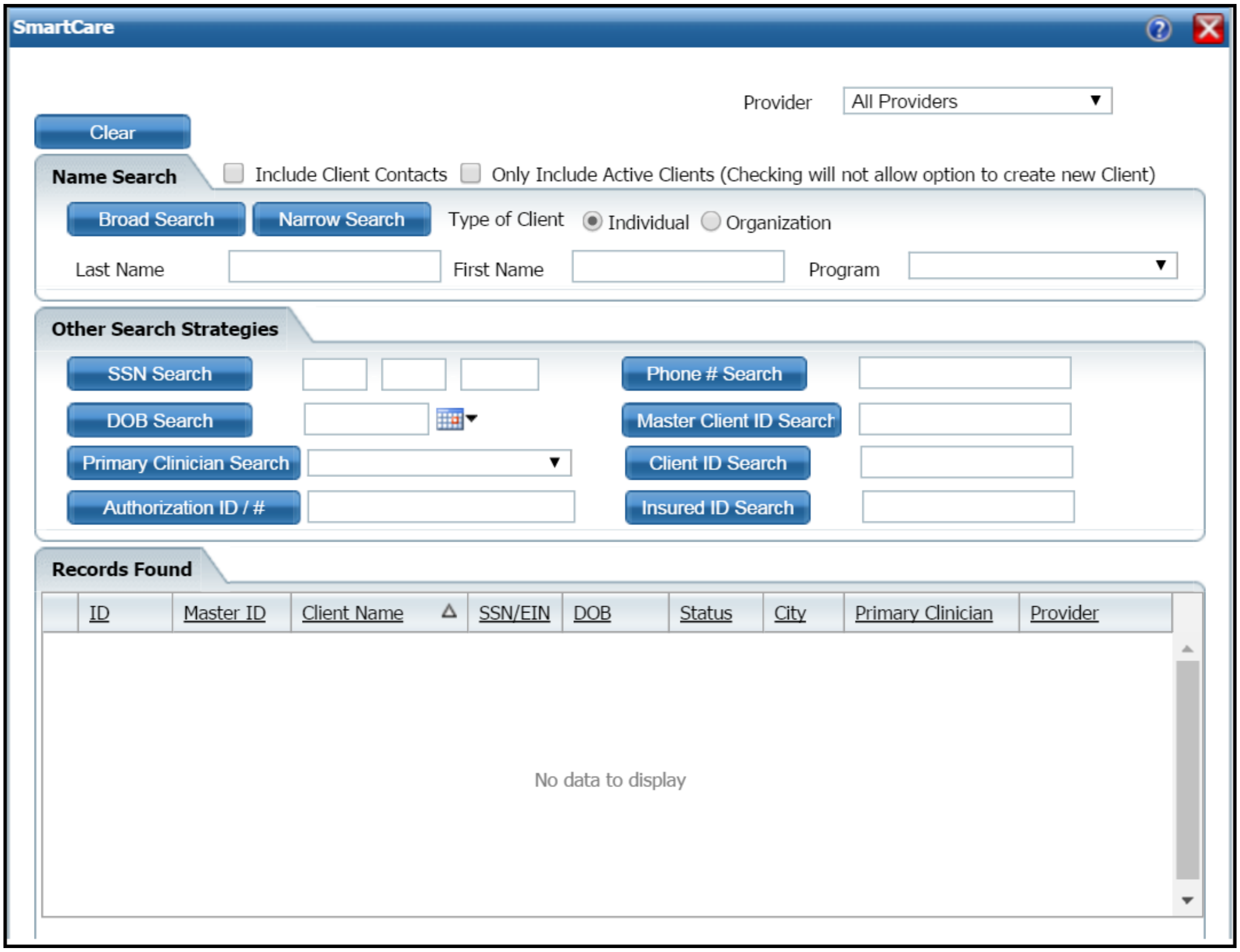


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Filter	
From	Select a date when the bed will be open. Defaults to the current day's date. Use the calendar icon to select a different date.
To	Select an end date to search for a period of time when a bed is open.
Bed Name	Enter the name of the bed to search for a specific bed. Or leave blank to search for all beds.
Programs	Search for all Programs or select from the drop-down list to search for a specific program.
Unit	Search for all Units or select from the drop-down list to search for a specific unit.
Type 1	Search for all types or select from the drop-down list to search for a specific Type 1.
Type 2	Search for all types or select from the drop-down list to search for a specific Type 2.
Room	Search for all rooms or select from the drop-down list to search for a specific bed.
Type 3	Search for all types or select from the drop-down list to search for a specific Type 3.
Type 4	Search for all types or select from the drop-down list to search for a specific Type 4..
Records Found	
Bed	Identifies an open bed that fits the filters you assigned in the *Bed Search* section.
Room	Identifies the room with the open bed(s).
Unit	Identifies the unit with the open bed(s).
Program	Identifies the program for the open bed(s).

Field	Description
Start Date	Identifies the start date when a bed is open.
End Date	Identifies the date when the bed is no longer open.
Type 1	Identifies the type of the open bed(s).
Type 2	Identifies the type of the open bed(s).
Type 3	Identifies the type of the open bed(s).
Type 4	Identifies the type of the open bed(s).

Client Search Window Field Definition



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field		**Description**
Clear button		Use to clear any information filled in the field before you conduct a new search.
Include Client Contacts		Select the include contacts of the client in the search. This option allows you to search for the client's contacts as well.
Only Include Active Clients		The search only searches through clients marked as Active. If you select this checkbox, you will not be able to create a new client.
Name Search tab		
Last Name		Enter the client's last name that you are looking for. Type up to 30 characters.
First Name		Insert the client's first name that you are looking for. Type up to 20 characters.
Program		Select the Program that the client is enrolled in.
Other Search Strategies		
SSN Search		Enter the client's social security number in the fields provided.

Field		Description
DOB Search		Enter the client's date of birth in mm/add/yyyy format or select from the calendar toolbar item.
Primary Clinician Search		To search by primary clinician, select the clinician using the drop-down list.
Phone # Search		To search by the client's phone number, type the phone number with no hyphens.
Master Client ID Search		To search by Master Client ID, type the ID number in the field.
Client ID Search		To search by the client's ID, type the ID number in the field.
Insured ID Search		To search by the insured ID, type the ID number in the field. This is the ID that is assigned to the person who carries the insurance for the client.
Records Found		
ID		Identifies the Client's ID assigned in SmartCare.
Master ID		Identifies the Client's Master ID if one is assigned in SmartCare.
First Name		Identifies the client's first name.
Last Name		Identifies the client's last name.
SSN		Identifies the client's social security number.
DOB		Identifies the client's date of birth.
Status		Identifies the client's current status in SmartCare.
City		Identifies the client's city of residence.
Primary Clinician		Identifies the primary clinician assigned to the client.
Provider		Identifies the provider assigned to the client.

Miscellaneous

Check for Spelling Errors in a Free-form Comment Field

When you have entered text in free-form comment fields on a page or window, if the spell check icon is present in the task bar, you can check for spelling errors in the comment fields.

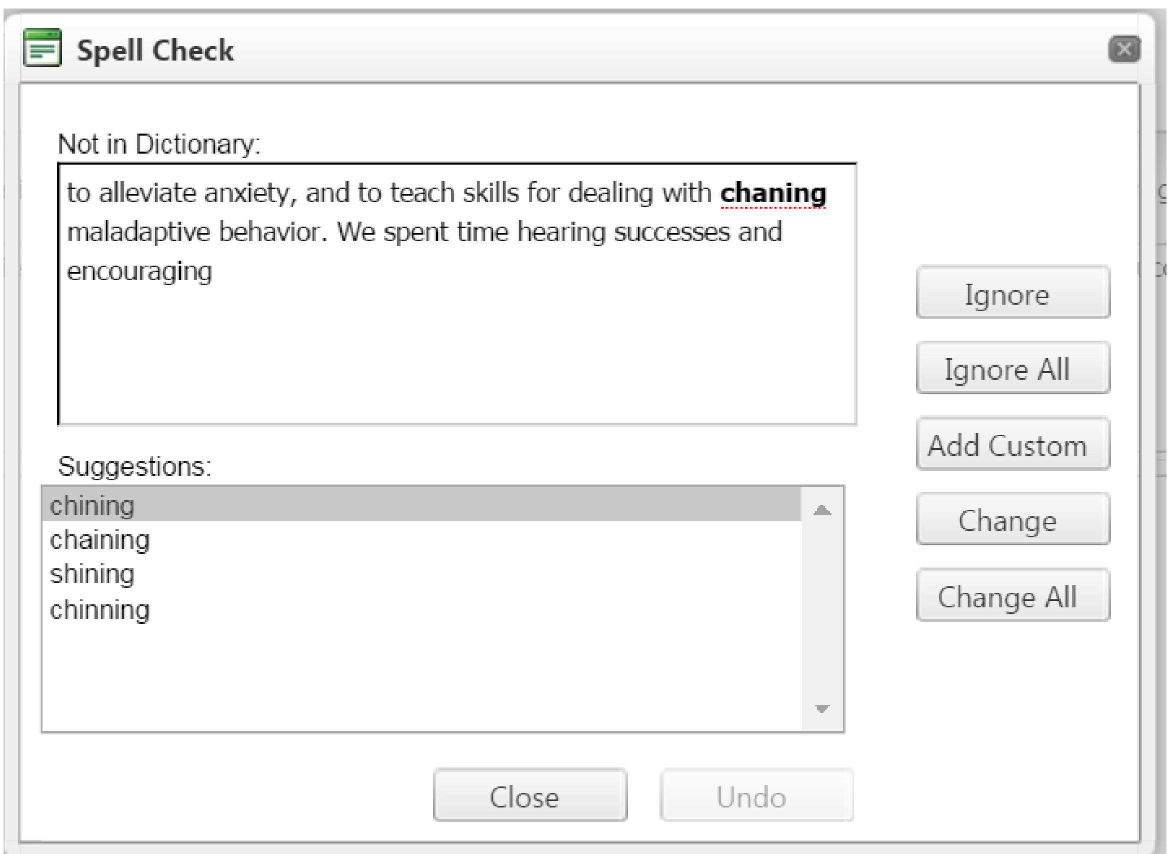
1. Complete all comment fields on a page or window.

2. Click the **spell check**  icon in the task bar.

   Spell Check searches all comment fields.

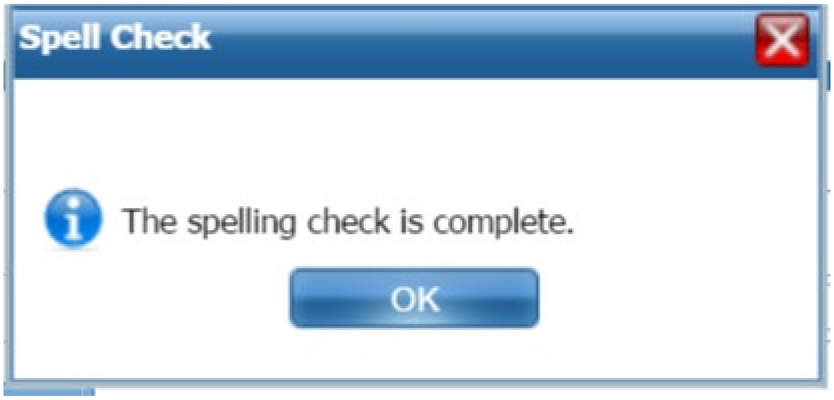
   If a misspelled word is found, the *Spell Check* window is displayed.

3. Notice that the misspelled word is bolded and underlined with a red dotted line in the *Not in Dictionary* pan. Suggestions for correct spellings are listed in the *Suggestions* panel. View field definitions. (See page 123)



-or-

If the *Spell check is complete* window is displayed, the spell check is complete.

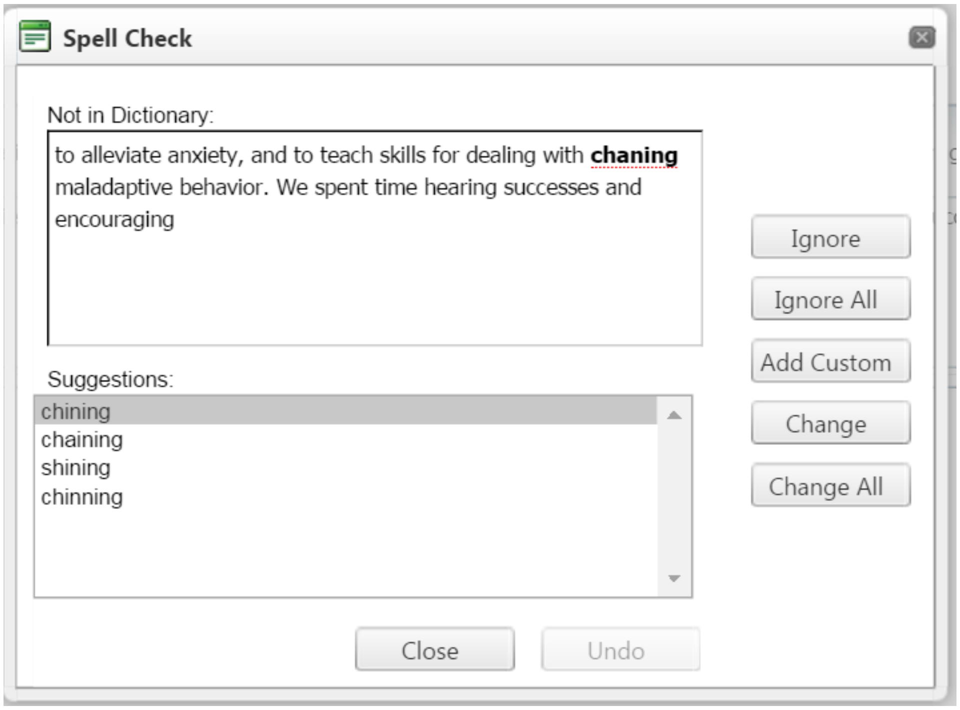


4. Click the **Yes** button in the *Spell check is complete* window.

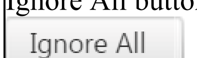
   The page you started the *Spell Check* from is displayed.

[Why can't I access these screens?](#)

Spell Check Window Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
<text>	Displays the text that contains a misspelled word(s). The first misspelled word is bolded and underlined with a red dotted line.
Word list	Words suggested by Spell Check to replace and correct the misspelled word. If no suggestions are listed, place your cursor in the misspelled word in the Not in Dictionary panel and correct the spelling. Click the **Change** or **Change All** button to correct the spelling.
Ignore button 	Click the **Ignore** button to accept the spelling as it is shown in the comment field. Spell check displays and highlights the next misspelled word, if there are any.
Ignore All button 	Click the **Ignore All** button to accept all incidents of the currently highlighted misspelled words as shown in the comment field.
Add Custom button 	Click the **Add Custom** button to add the word to the system dictionary. If you add the word with its shown spelling, it will not no longer be shown as a misspelled word. Use this function for words, such as brand name words, or commonly used abbreviations in your facility. By adding these custom words, they will no longer be shown as misspelled. When you click the **Add Custom** button, a message window asks if you want to add the word to the dictionary. Click **Yes** to save the word.

Field	Description
Change button 	In the *Suggestions* panel, highlight the correctly spelled word and click the **Change** button. The next misspelled word is displayed and highlighted in the *Not in Dictionary* panel.
Change All button 	In the Suggestions panel, highlight the correctly spelled word and click the **Change All** button to correct all instances of this same misspelled word. The next misspelled word is displayed and highlighted in the *Not in Dictionary* panel.
Close button 	When you have finished correcting misspelled words, click the **Close** button. The *Spell Check Complete* window is displayed if all misspelled words have been corrected or ignored.
Undo button 	Click the **Undo** button to undo the last action that you took in the Spell Check window.

Filter a List Page

A list page displays a list of all the content categories on the page. Using the filters you can narrow the list of information that you view. The filters vary depending on the content of the list.

1. Follow a path from a banner selection to display a list page.

   The list page is displayed

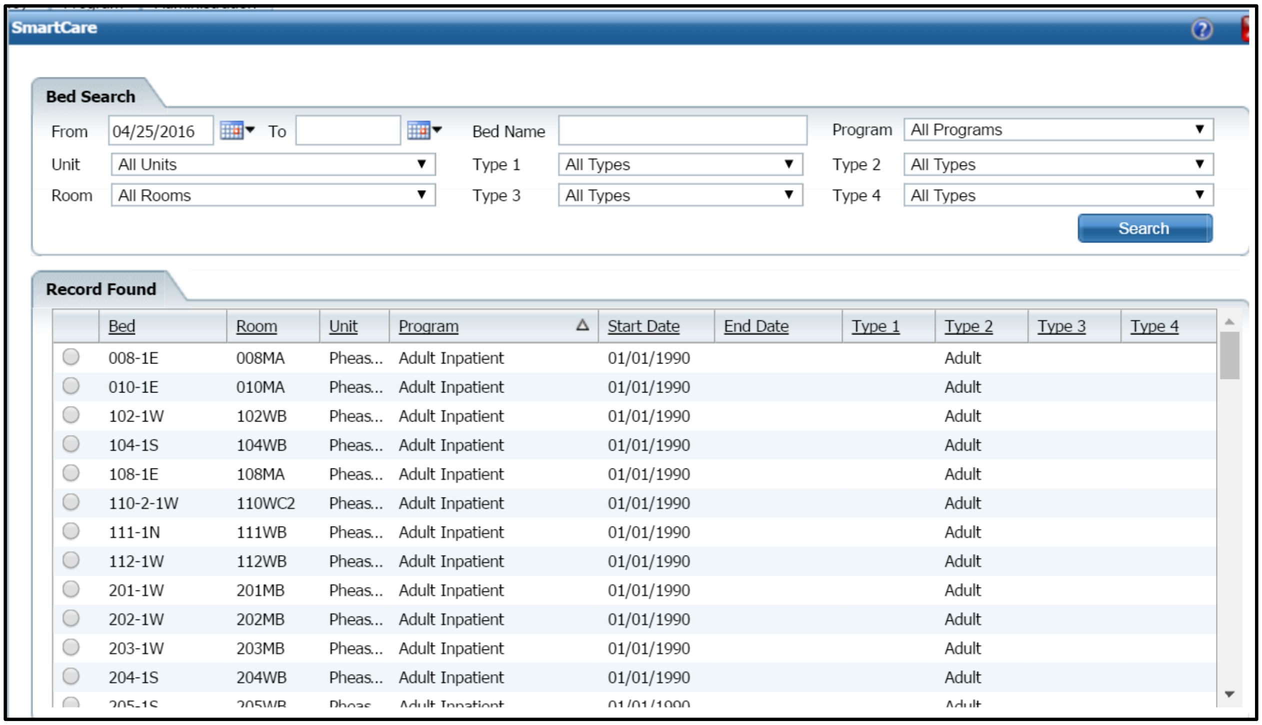
2. In the drop-down lists in the *Filter* box, select the items in each drop-down list to limit what is displayed on the page.

3. Click the **Apply Filter** button.

   Note: The filter that you apply to that page remains until you change the filters and click the *Apply Filter* button again.

4. When the list is displayed, click on a **hyperlinked item** to view the detail page for that item.

Filter a Search Page



A *Filter* section is provided at top of a Search window.. Use the fields in the Search section to narrow or broaden the list of items that are displayed from the search.

The fields in the *Filter* section are representative of the various data fields for the records that you can search for. The drop down lists for each of the data fields let you narrow the display of records to search for.

To use a *Filter* section on a search page:

1. Click the **drop down list** for each data field that you want to filter by.
2. Select an option from the drop down list.
3. When done changing filters, click the **Search** button.

Why Can't I Access a Screen?

You can only access screens that your user sign on has been granted access to. This property is referred to as *Permissions*. Use the table below to find the screen you need access to and determine the Permissions that are needed. To solve this, you need to discuss this issue with your system administrator to have the Permissions changed.

To access *Permissions:*

1. Follow this path: **Administration ▸ User/Role Setup ▸ Role Definition.**

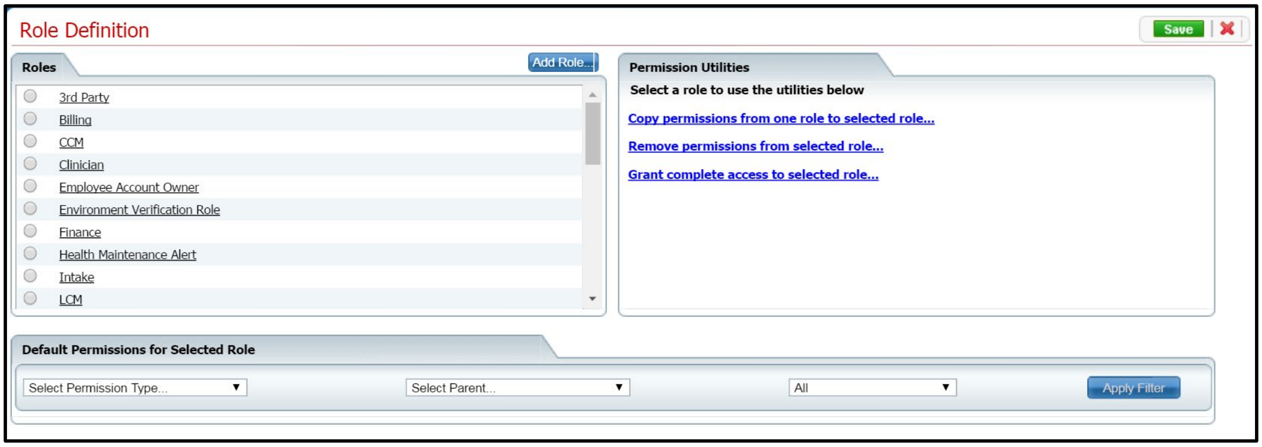
   The *Role Definition* page is displayed. View field definitions (See page 97).

From the *Role Definition* page, you can:

Determine Which Permissions Are Needed for the Bed Census Pages

You Need Permission Type	Parent	Permission Item
Banners	Administration	Units/Rooms/Beds (Units/Rooms/Beds)
Banners	Client	Client Summary (Client Summary)
Banners	My Office	Bed Census (Bed Census)
Screens	Administration	Bed Details
Screens	Administration	Room Details
Screens	Administration	Unit Details
Screens	Client	Client Search
Screens	My Office	Admit
Screens	My Office	Bed Attendance
Screens	My Office	Bed Census
Screens	My Office	Bed Change
Screens	My Office	Bed Search
Screens	My Office	Census Management
Screens	My Office	Discharge
Screens	My Office	Inpatient Activity Details
Screens	My Office	On Leave
Screens	My Office	Schedule Admission
Screens	My Office	Schedule Bed Change
Screens	My Office	Schedule Return from Leave
Screens	My Office	Schedule Transfer

Role Definitions Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Roles	
Roles	All roles defined in the system. A role defines a collection of permissions to make it easier to assign permission to each staff member who will use the system. Permissions are assigned to staff to give them permission to access list pages, screens and windows in SmartCare.
Add Role 	Click the Add Role button to add a new role to the system and assign permissions to that role.
Default Permissions for Selected Role	
Select Permission Type	Use this drop down list to display one permission type for the selected role.
Select Parent	Use this drop down list to select a specific parent type to view.
All	Use this drop down list to select to view all permissions, Granted permissions or Denied permissions for the selected role.
Permission Utilities	
Selected Role	This field appears if you have selected a role in the *Roles s*ection.
Copy permissions from one role to selected role	Click the hyperlink to copy permissions set up for one role to the Selected Role. When you click the Save button, all permission are copied from the role you select in the *Copy Permission from...* drop down list. However, If there are permission already set up on the *Selected Role*, these permission are not overridden.
Remove permissions from selected role	Use this option to remove all permissions from the selected role.
Grant complete access to the selected role	Use this option to grant all permissions in the system to the selected role.

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