



Bedboard User Guide

Version 2
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Overview

Bedboard is used to manage the beds in an in-patient facility. When you create a Unit in SmartCare, you define whether the unit will display in Bedboard or Bed Census. You manage beds in Bedboard. The Bedboard list page shows all beds and identifies whether the bed is in use or not. You can use Bedboard to manage new admissions and discharges, clients' attendance, and change beds and programs.

Census Summary enables you to see the total bed availability for all units and programs. The Census Summary list page indicates the capacity of beds for a unit/program, how many beds are occupied across the next 4 days, how many beds are scheduled for discharge, how many beds are scheduled for admission, and based on Open Status and Scheduled Discharge, how many beds are available. Census Summary also enables you to quickly block an available bed for a client.

Display the Bedboard List Page

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.

Display the Census Summary List Page

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

The Census Summary list page is displayed. Refer to [Census Summary List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Census Summary (6)

Supervision Hierarchy: Unit: All Units Program: Youth Residential **Apply Filter**

Date Range: Custom From Date: 11/11/2019 To Date: 11/12/2019

	Monday, November 11, 2019					(Today) Tuesday, November 12, 2019				
<input checked="" type="radio"/> Unit View <input type="radio"/> Program View	Bed Cap.	Census	D/C's	Adm's	Avail	Bed Cap.	Census	D/C's	Adm's	Avail
Adult Inpatient	5	2			3	5	2			3
Bridge	2	1		1	1	2	1		1	1
Bridge ATU	3	1			1	3	1			1
Kingsboro ATC	5				5	5				5
Pheasant Hollow	19	3			14	19	3			14
Stutzman ATC	4				4	4				4
Total	38	7		1	28	38	7		1	28

Click the hyperlinked unit/program name or hyperlinked number in any of the table cells to display the Bedboard list page that is already filtered for the relevant criteria. Then refer to the applicable topic in this guide to perform other actions from the Bedboard list page.

Using Bedboard

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 > **Bedboard** sub-banner.

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

From the Bedboard list page you can:

- [Admit a Client](#)
- [Schedule an Admission](#)
- [Change a Bed Assignment](#)
- [Schedule a Bed Change](#)
- [Block a Bed](#)
- [Unblock a Bed](#)
- [Set a Client On Leave](#)
- [Schedule a Client On Leave](#)
- [Return a Client from Leave](#)
- [Schedule Return from Leave](#)
- [Discharge a Client](#)
- [Schedule a Discharge](#)
- [Transfer a Client](#)
- [Schedule a Transfer](#)
- [Swap Beds](#)
- [Swing a Bed](#)
- [Export Bedboard Data](#)

Schedule 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. You can:

- [Schedule an Admission](#)
- [Change the Scheduled Admission](#)
- [Admit a Client With a Scheduled Admission](#)
- [Cancel the Scheduled Admission](#)

Before You Begin

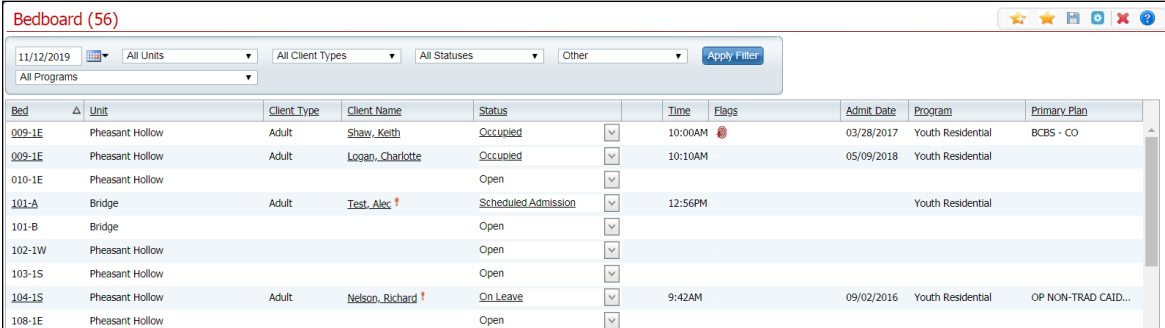
The client must be entered in the system and enrolled in a program before they can be scheduled for admission to a bed.

Schedule an Admission

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)



The screenshot shows the 'Bedboard (56)' application interface. At the top, there are filter options for date (11/12/2019), units (All Units), client types (All Client Types), statuses (All Statuses), and other (Other). Below the filters is a table with columns: Bed, Unit, Client Type, Client Name, Status, Time, Flags, Admit Date, Program, and Primary Plan. The table contains several rows of data, including beds that are occupied, open, or scheduled for admission.

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find a **bed** with a status of Open. Refer to [Search for a Bed](#) for more information.
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?](#)

- Find the client you want to schedule the admission for.

The Census Management - Schedule Admission screen is displayed.

- Complete the required and necessary fields on the Census Management - Schedule Admission screen. Refer to [Census Management - Schedule Admission Screen Field Definitions](#) for information about each field.
- When the screen is complete, click the **Save and Close** button in the tool bar.

Change a Scheduled Admission

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logap, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Filter the list to determine the records that are displayed.

- Find the **client** whose status you want to change.

The Census Management - Schedule Admission screen is displayed. Refer to [Census Management - Schedule Admission Screen Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

- Click the **Scheduled Admission** hyperlink in the Status column.

The Inpatient Activity Details screen is displayed with the Activity Details tab displayed.

- Make changes to any fields on the screen. Refer to [Inpatient Activity Details Screen Activity Details Tab Field Definitions](#) for information about each field.
- When the screen is complete, click the **Save** button in the tool bar.

Cancel a Scheduled Admission

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to display the record you want.
3. Find a **bed** with a status of **Scheduled Admission**.
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 screen is displayed. Refer to [Census Management - Cancel Admission](#) for information about each field.

Census Management - Cancel Admission

Activity

1661320 Macceo, Sue DOB: 07/20/1993 Gender: Female Scheduled Date/Time: 04/20/2016 12:00 AM

Action: Cancel Admission Cancel Date: 04/20/2016 Time: 00:00 Non-Billable Hold Bed

Program: Older Adult Sustaining Care C98 Overflow

Bed: Bed Search... Only show beds for selected program

Unit: Artec West 1 Boys Client Type: Adult

Room: AW1A Comments:

Admission Type: Crisis Admission Source: 5 - Transfer from

Assignment Type: Salt Lake County Reason: Rehab for Medicine

Location: YAP Kenmore Apt Billing Procedure: SupHsg Milieu pe

Clinician: Physician:

5. Verify that 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 screen is complete, click the **Save and Close** button in the tool bar.

The client is removed from the Bedboard page and the bed's status is Open.

Admit a Client With a Scheduled Admission

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

The screenshot shows a web application window titled "Bedboard (56)". At the top, there are several filter dropdowns: "11/12/2019", "All Units", "All Client Types", "All Statuses", and "Other", along with an "Apply Filter" button. Below the filters is a table with the following columns: Bed, Unit, Client Type, Client Name, Status, Time, Flags, Admit Date, Program, and Primary Plan. The table contains several rows of data, including one row where the status is "Scheduled Admission".

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Find the client with a scheduled admission who you want to admit.
3. On the Bedboard list page, click on the **drop-down arrow** in the Status column and select **Admit**.

The Census Management – Admit screen is displayed. Refer to [Census Management - Admit Screen Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Census Management - Admit Save and Close

Activity

2104845 **Smith, Gertr...** DOB: 01/02/1934 Gender: Female Scheduled Date/Time:

Action: Admit Firm Non-Billable Hold Bed

Admit Date: 11/11/2019 Time: 12:00 AM Expected Discharge Date: Time:

Arrival Date: Time: Admit Decision Date: Time:

Emergency Room Arrival: Time:

Emergency Room Departure: Time:

Program: Youth Residential Overflow

Bed: 103-1S (Adult) **Bed Search...** Only show beds for selected program

Unit: Pheasant Hollow Client Type:

Room: 103WB Comments:

Admission Type: Admission Source:

Assignment Type: Reason:

Location: State-Operated Fz Billing Procedure: Flx Care Res NO

Clinician: Physician:

4. Enter the **Arrival Date and Time**.
5. Click the **Save and Close** button in the tool bar.

Admit a Client

Use this task to admit a client to a bed in a unit. You can:

- [Admit a Client](#)
- [Change the Admission](#)
- [Delete an Admission](#)

Admit a Client to a Bed in a Unit

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

The screenshot shows the 'Bedboard (56)' application window. At the top, there are filter controls for date (11/12/2019), units (All Units), client types (All Client Types), statuses (All Statuses), and other options. Below the filters is a table with the following columns: Bed, Unit, Client Type, Client Name, Status, Time, Flags, Admit Date, Program, and Primary Plan. The table contains several rows of data, including beds 009-1E, 010-1E, 101-A, 101-B, 102-1W, 103-1S, 104-1S, and 108-1E. The status of these beds varies, with some being 'Occupied', 'Open', or 'On Leave'.

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find a **bed** with a status of Open. Refer to [Search for a Bed](#) for more information.
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.

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

The Census Management - Admit screen is displayed.

- Complete the **required and necessary** fields on the Census Management - Admit screen. Refer to [Census Management - Admit Screen Field Definitions](#) for information about each field.
- When the screen is complete, click the **Save and Close** button in the tool bar.

Change an Admission of a Client

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Filter the list to determine the records that are displayed.
- Find the client whose admission you want to change.
- Click on the **hyperlinked status** in the Status column.

The Inpatient Activity Details screen is displayed with the Activity Details tab active.

Inpatient Activity Details

Visit: 1666220 | Seaman, Hayden

Status: Occupied | Disposition: []

Program: Residential Region 1

Bed: R1H2 Bed 2 | [Bed Search...](#)

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Assignment Type: [] | Reason: []

Location: Bayside Hos[] | Billing Procedure: Residential

Clinician: [] | Physician: []

Start Date: 03/13/2018 | Time: 1:34 PM


End Date: [] | Time: []

Arrival Date: [] | Time: []

Overflow | Firm | Hold Bed

Only show beds for selected program | Non-Billable

Comments: []

5. Complete the **required and necessary fields** on the Inpatient Activity Details screen Activity Details tab to make any changes. Refer to [Inpatient Activity Details Screen Activity Details Tab Field Definitions](#) for information about each field.
6. When the screen is complete, click the **Save** button in the tool bar.
7. Click the **Exit** icon () in the tool bar to close the window.

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

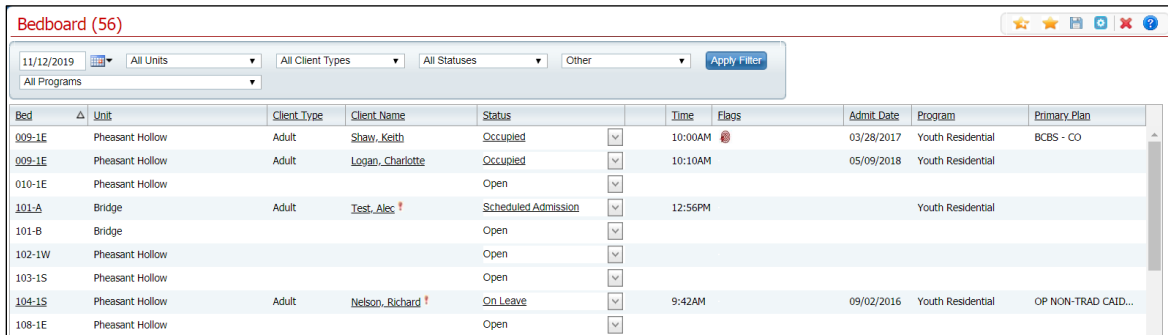
Delete an Admission

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 > **Bedboard** sub-banner.

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)




The screenshot shows a web application window titled "Bedboard (56)". At the top, there are several filters: a date dropdown set to "11/12/2019", a unit dropdown set to "All Units", a client type dropdown set to "All Client Types", a status dropdown set to "All Statuses", and an "Other" dropdown. An "Apply Filter" button is to the right. Below the filters is a table with the following columns: Bed, Unit, Client Type, Client Name, Status, Time, Flags, Admit Date, Program, and Primary Plan. The table contains several rows of data, including records for Shaw, Keith (Occupied), Logan, Charlotte (Occupied), Test, Alex (Scheduled Admission), and Nelson, Richard (On Leave).

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the client and bed whose admission you want to delete.
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.

5. Click the **trash can** icon () in the tool bar to delete the admission.

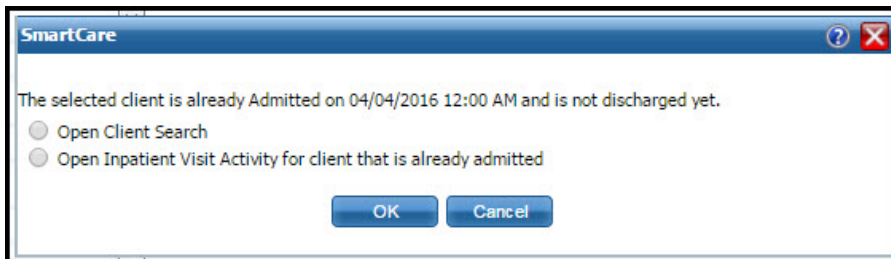
The Message Confirmation window is displayed.

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

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

Message Window Is Appearing

1. When you click the drop-down arrow on an Open bed, if this error message is displayed, it means you already have a client's information open.



2. Look in the menu tabs above the screen to determine which client's account is open. Notice the red box outlining the client's tab in the figure below.



- If the selected client is not the person you want to admit, select the **Open Client Search** option in the error message window and click **OK** to display a different client.

-or-

If you need to further investigate the selected client, select the **Open Inpatient Visit Activity** option in the error message window and click **OK** to investigate the open client's activity history.

The error message window is closed.

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](#)
- [Change a Scheduled Bed Change](#)
- [Delete a Scheduled Bed Change](#)

Schedule a Bed Change

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.






[Why Can't I Access This Screen?](#)

The screenshot shows the 'Bedboard (56)' application window. At the top, there are filter options for date (11/12/2019), units (All Units), client types (All Client Types), statuses (All Statuses), and other (Other). Below the filters is a table with columns: Bed, Unit, Client_Type, Client_Name, Status, Time, Flags, Admit_Date, Program, and Primary_Plan. The table contains several rows of data, including clients like Shaw, Keith; Logan, Charlotte; Test, Alex; and Nelson, Richard.

Bed	Unit	Client_Type	Client_Name	Status	Time	Flags	Admit_Date	Program	Primary_Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Filter the list to determine the records that are displayed.
- Find the **client** on the Bedboard list page.
- Click the **drop-down arrow** in the Status column for the client.
- Select **Schedule Bed Change** from the drop-down list.

The Census Management - Schedule Bed Change screen is displayed.

Census Management - Schedule Bed Change Save and Close     

Activity

2104637 Smith, Berve... DOB: 09/01/2001 Gender: Female Initial Admit Date/Time: 09/02/2016 01:56 PM

Action: Schedule Bed Change Scheduled Date: 11/13/2019 Time: 12:00 PM Firm Non-Billable Hold Bed

Program: Youth Residential Overflow

Bed: F1 - Bed 1 Bed Search... Only show beds for selected program

Unit: Bridge ATU Client Type: Adolescent

Room: Female 1 Comments:

Admission Type: Crisis Admission Source:

Assignment Type: Reason:

Location: State-Operated Fc Billing Procedure: Flx Care Res NO

Clinician: Physician:

From

Program: Youth Residential

Unit: Bridge ATU

Room: Female 1

Bed: F1 - Bed 1

Start Date/Time: 10/29/2016 06:00 PM

6. Select the **new bed** from the drop-down list in the Bed field.
7. Click the **Save and Close** button in the tool bar.

The Bedboard 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 Bedboard list page to the scheduled bed change date.

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 > **Bedboard** sub-banner.

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bedboard (56)

11/12/2019 All Units All Client Types All Statuses Other Apply Filter

All Programs

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Filter the list to determine the records that are displayed.
- Find the **client** on the Bedboard list page.
- Click the hyperlinked **Scheduled Bed Change** in the Status column for the client.

The Inpatient Activity Details screen is displayed with the Activity Details tab active.

Inpatient Activity Details

Visit Activity Details Bed Charges Charge Details

Activity

1666220 Seaman, Hayden

Status: Occupied Disposition:

Action:

Program: Residential Region 1

Bed: R1H2 Bed 2 Bed Search...

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Assignment Type: Reason:

Location: Bayside Hos Billing Procedure: Residential

Clinician: Physician:

Start Date: 03/13/2018 Time: 1:34 PM

End Date: Time:

Arrival Date: Time:

Overflow Firm Hold Bed

Only show beds for selected program Non-Billable

Comments:

- Verify the correct client information is displayed.
- Complete the changes you want to make on the Activity section and click the **Save** button in the tool bar. Refer to [Inpatient Activity Details Screen Activity Details Tab Field Definitions](#) for information about each field.

The Census Management - Schedule Bed Change screen is displayed.

7. In the Activity section, you can:

- Change the Start Date - Click the **Calendar** icon 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](#)
 - [Schedule Transfer](#)
 - [Schedule On Leave](#)
- 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 in the tool bar.

9. Click the **Exit** icon () in the tool bar.

The Bedboard 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 Bedboard list page to the new scheduled bed change date.

Delete a Scheduled Bed Change

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

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** on the Bedboard list page.
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.

Inpatient Activity Details

Visit | Activity Details | Bed Charges | Charge Details

Activity

1666220 | Seaman, Hayden

Status: Occupied | Disposition:

Action: [Dropdown]

Program: Residential Region 1

Bed: R1H2 Bed 2 | [Bed Search...](#)

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Assignment Type: [Dropdown] | Reason: [Dropdown]

Location: Bayside Hos[Dropdown] | Billing Procedure: Residential

Clinician: [Dropdown] | Physician: [Dropdown]

Start Date: 03/13/2018 | Time: 1:34 PM

End Date: [Dropdown] | Time: [Dropdown]


Arrival Date: [Dropdown] | Time: [Dropdown]

Overflow | Firm | Hold Bed

Only show beds for selected program | Non-Billable

Comments: [Text Area]

Buttons: Save, [Trash Can], [Close]

5. Verify the correct client information is displayed.
6. Click the **trash can** icon () in the tool bar.

The Confirmation Message window is displayed.

- 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.

- Click the **Exit** icon () in the tool bar.

The Bedboard list page is displayed. The client is listed as Occupied in the original bed.

Change a Bed Assignment

You can 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, refer to [Transfer a Client](#). 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](#)
- [Delete a Bed Change](#)

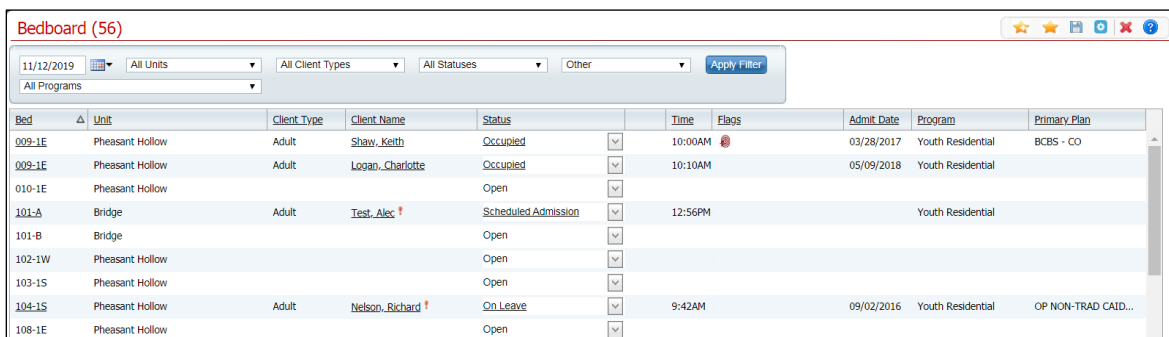
Change a Bed Assignment

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

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)



Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Filter the list to determine the records that are displayed.
- Click the **drop-down arrow** in the Status column for the client who is changing beds.
- Select **Bed Change** from the drop-down list.

The Census Management - Bed Change screen is displayed.

Census Management - Bed Change Save and Close

Activity

2104638 **Tenant, Lei** DOB: 12/15/1988 Gender: Female Initial Admit Date/Time: 09/08/2016 12:00 AM

Action: Bed Change Change Date: 09/08/2016 Time: 12:00 AM Firm Non-Billable Hold Bed

Program: Youth Residential Overflow

Bed: 207-1E (Adult) Bed Search... Only show beds for selected program

Unit: Pheasant Hollow Client Type: Adult

Room: 207MB Comments:

Admission Type: Non-Crisis Admission Source: 1 - Non-Health C:

Assignment Type: Summit Reason: Alcohol/Drug trea

Location: State-Operated F: Billing Procedure: Flx Care Res NO

Clinician: Li, Lei Physician: Adams, Joe

From

Program: Youth Residential

Unit: Pheasant Hollow

Room: 112WB

Bed: 112-1W

Start Date/Time: 02/28/2017 09:00 PM

5. Select the **new bed** from the drop-down list in the Bed field.
6. Click the **Save and Close** button in the tool bar.

The Bedboard 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.

Delete a Bed Change Assignment

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.


[Why Can't I Access This Screen?](#)

Bedboard (56) ★ ★ 📄 ⚙️ ✖️ ?

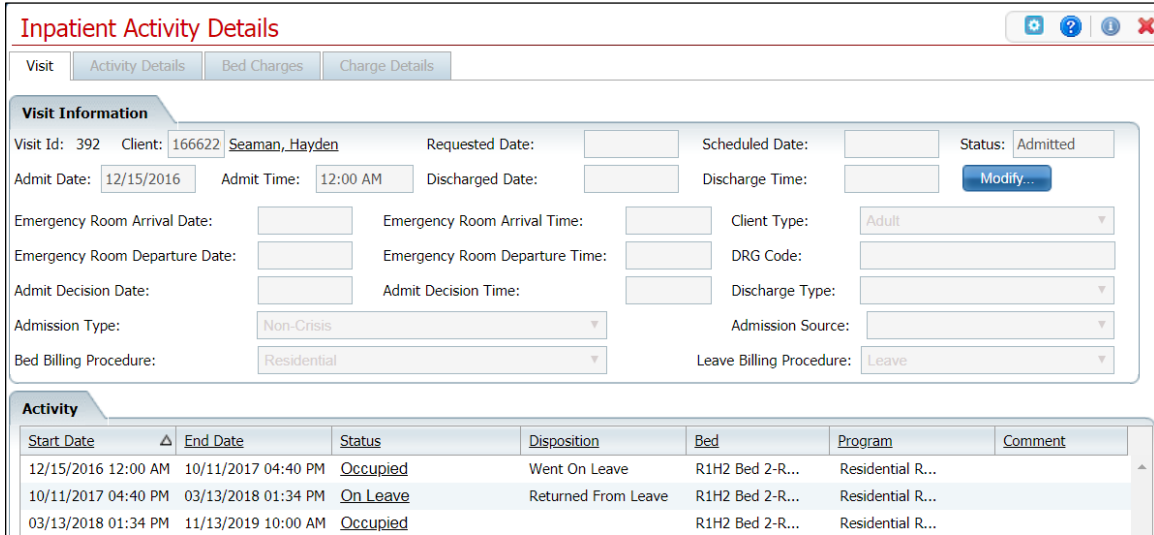
11/12/2019 All Units All Client Types All Statuses Other Apply Filter

All Programs

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM	🔴	03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** on the Bedboard list page with the status of Bed Changed. Refer to [Search for a Bed](#) for more information.
4. Click the **open book** icon () in the unnamed column of the client whose bed change you want to delete.

The Inpatient Activity Details page is displayed with the Visit tab open. Refer to [Inpatient Activity Details Screen Visit Tab Field Definitions](#) for information about each field.



Inpatient Activity Details

Visit | Activity Details | Bed Charges | Charge Details

Visit Information

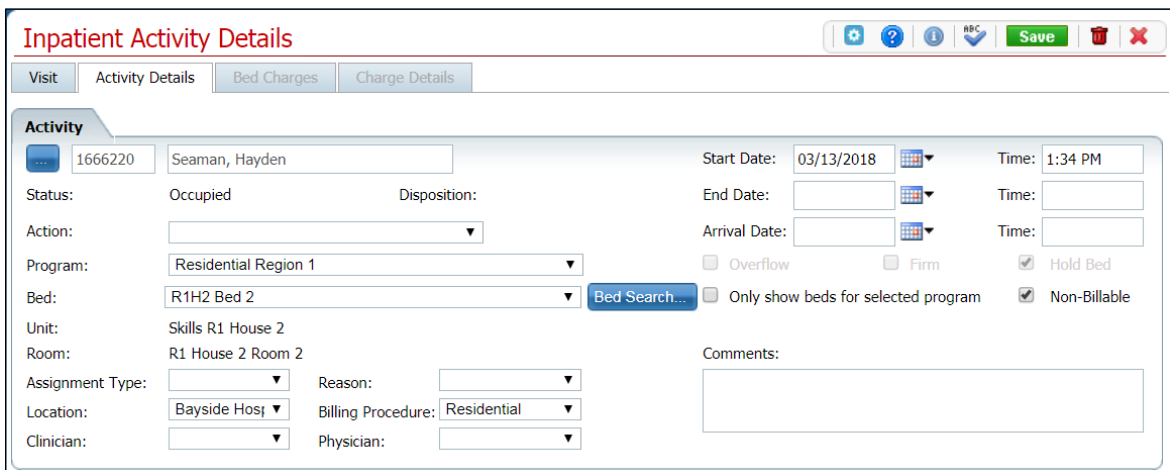
Visit Id: 392 Client: 166622 Seaman, Hayden Requested Date: Scheduled Date: Status: Admitted
 Admit Date: 12/15/2016 Admit Time: 12:00 AM Discharged Date: Discharge Time: Modify...
 Emergency Room Arrival Date: Emergency Room Arrival Time: Client Type: Adult
 Emergency Room Departure Date: Emergency Room Departure Time: DRG Code:
 Admit Decision Date: Admit Decision Time: Discharge Type:
 Admission Type: Non-Crisis Admission Source:
 Bed Billing Procedure: Residential Leave Billing Procedure: Leave

Activity

Start Date	End Date	Status	Disposition	Bed	Program	Comment
12/15/2016 12:00 AM	10/11/2017 04:40 PM	Occupied	Went On Leave	R1H2 Bed 2-R...	Residential R...	
10/11/2017 04:40 PM	03/13/2018 01:34 PM	On Leave	Returned From Leave	R1H2 Bed 2-R...	Residential R...	
03/13/2018 01:34 PM	11/13/2019 10:00 AM	Occupied		R1H2 Bed 2-R...	Residential R...	

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. Refer to [Inpatient Activity Details Screen Activity Details Tab Field Definitions](#) for information about each field.




Inpatient Activity Details

Visit | Activity Details | Bed Charges | Charge Details

Activity

1666220 Seaman, Hayden Start Date: 03/13/2018 Time: 1:34 PM
 Status: Occupied Disposition: End Date: Time:
 Action: Arrival Date: Time:
 Program: Residential Region 1 Overflow Firm Hold Bed
 Bed: R1H2 Bed 2 Only show beds for selected program Non-Billable
 Unit: Skills R1 House 2
 Room: R1 House 2 Room 2
 Assignment Type: Reason:
 Location: Bayside Hos Billing Procedure: Residential
 Clinician: Physician: Comments:

6. Verify the correct client and bed change information is displayed.
7. Click the **trash can** icon () in the tool 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.

Inpatient Activity Details

Visit
Activity Details
Bed Charges
Charge Details

Visit Information

Visit Id: 392 Client: 166622 Seaman, Hayden Requested Date: Scheduled Date: Status: Admitted

Admit Date: 12/15/2016 Admit Time: 12:00 AM Discharged Date: Discharge Time: Modify...

Emergency Room Arrival Date: Emergency Room Arrival Time: Client Type: Adult

Emergency Room Departure Date: Emergency Room Departure Time: DRG Code:


Admit Decision Date: Admit Decision Time: Discharge Type:

Admission Type: Non-Crisis Admission Source:

Bed Billing Procedure: Residential Leave Billing Procedure: Leave

Activity

Start Date	End Date	Status	Disposition	Bed	Program	Comment
12/15/2016 12:00 AM	10/11/2017 04:40 PM	Occupied	Went On Leave	R1H2 Bed 2-R...	Residential R...	
10/11/2017 04:40 PM	03/13/2018 01:34 PM	On Leave	Returned From Leave	R1H2 Bed 2-R...	Residential R...	
03/13/2018 01:34 PM	11/13/2019 10:00 AM	Occupied		R1H2 Bed 2-R...	Residential R...	

9. In the Activity section, verify that the record you removed is no longer displayed.
10. Click the **Exit** icon () in the tool bar.
The Bedboard list page is displayed. Notice that the Status on the client's record is Occupied in the original bed.

Block a Bed

Follow the steps below to block a bed from being occupied.

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Find the **desired bed**. The bed must have a Status of Open.
3. Click the **down arrow** in the Status column and select **Block Bed**.

The Block Bed window is displayed. Refer to [Block Bed Window Field Definitions](#) for information about each field.

SmartCare

Activity

Action: Block Bed

Start Date: Time: End Date: Time:

Blocked Reason:

Blocked Bed:

4. Complete the **required and necessary fields** and click the **Block** button.

The Bedboard list page is displayed and the bed has a Status of Blocked.

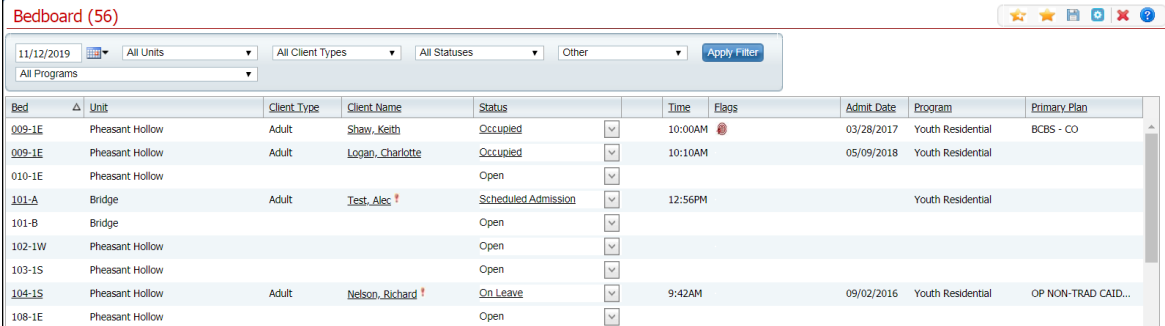
Unblock a Bed

Follow the steps below to unblock a bed to allow it to be occupied or scheduled for use.

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

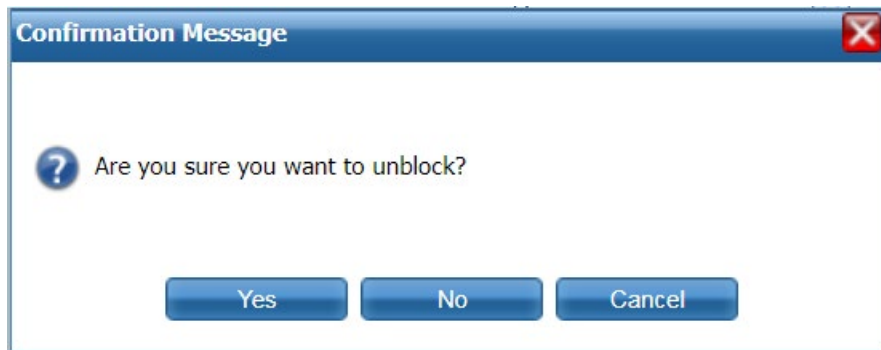
[Why Can't I Access This Screen?](#)



Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Find the **desired bed**, click the **down arrow** in the Status column, and select **Unblock Bed**.

A Confirmation Message pop-up is displayed.



3. Click the **Yes** button and the Status of the bed changes to Open.

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:

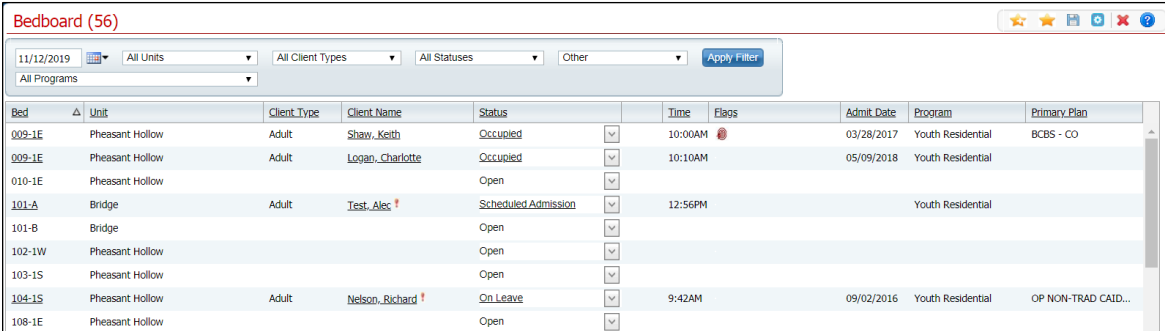
- [Schedule a Discharge](#)
- [Change a Scheduled Discharge](#)
- [Delete a Scheduled Discharge](#)

Schedule a Discharge

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)



The screenshot shows the 'Bedboard (56)' application window. At the top, there are filter options for date (11/12/2019), units (All Units), client types (All Client Types), statuses (All Statuses), and other filters. Below the filters is a table with the following columns: Bed, Unit, Client Type, Client Name, Status, Time, Flags, Admit Date, Program, and Primary Plan. The table contains several rows of data, including beds 009-1E, 010-1E, 101-A, 101-B, 102-1W, 103-1S, 104-1S, and 108-1E. The status of each bed is indicated in the 'Status' column, with some rows showing a dropdown arrow.

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** you want to schedule the discharge for.

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 screen is displayed.

Census Management - Schedule Discharge Save and Close

Activity

1666220 Seaman, Hayd... DOB: 07/27/2003 Gender: Male Initial Admit Date/Time: 12/15/2016 12:00 AM

Action: Schedule Discharge Scheduled Date: 11/12/2019 Time: 12:00 AM Firm Non-Billable Hold Bed

Program: Residential Region 1 Overflow

Bed: R1H2 Bed 2 (Adult) Only show beds for selected program

Unit: Skills R1 House 2 Client Type: Adult

Room: R1 House 2 Room 2

Admission Type: Non-Crisis Admission Source: Reason: Comments:

Assignment Type: Billing Procedure: Residential

Location: Bayside Hospital Physician:

From

Program: Residential Region 1

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Bed: R1H2 Bed 2

Start Date/Time: 03/13/2018 01:34 PM

5. Complete the **required and necessary fields** on the Census Management - Schedule Discharge screen. Refer to [Census Management - Schedule Discharge Screen Field Definitions](#) for information about each field.
6. When the screen is complete, click the **Save and Close** button in the tool bar.

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.


[Why Can't I Access This Screen?](#)

Bedboard (56) ★ ★ ★

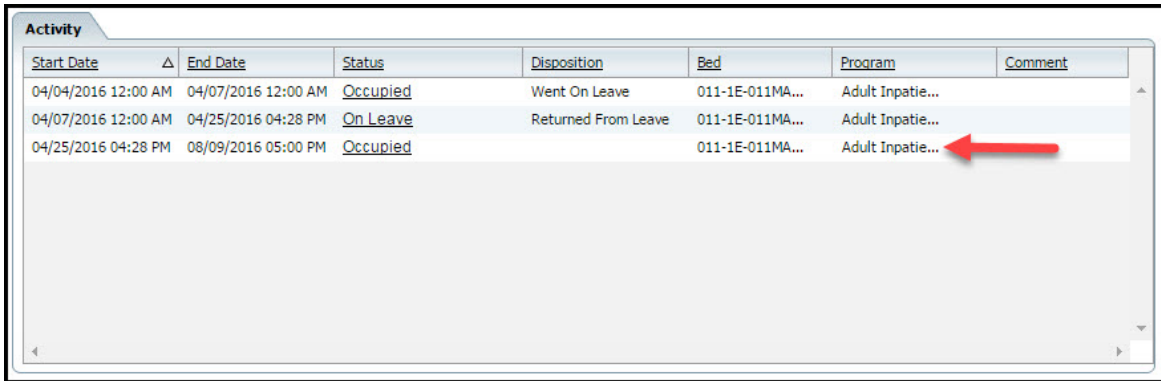
11/12/2019 All Units All Client Types All Statuses Other

All Programs

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** whose scheduled discharge you want to change.
4. Click the **open book** icon () in the unnamed column for the client whose scheduled discharge you want to change.

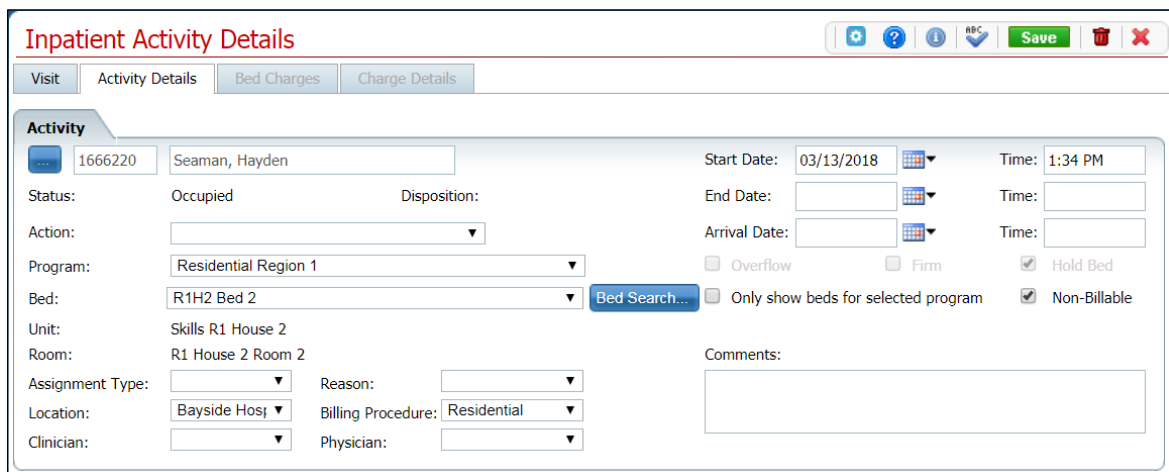
The Inpatient Activity Details page is displayed with the Visit tab active. View [field definitions](#).



Start Date	End Date	Status	Disposition	Bed	Program	Comment
04/04/2016 12:00 AM	04/07/2016 12:00 AM	Occupied	Went On Leave	011-1E-011MA...	Adult Inpatie...	
04/07/2016 12:00 AM	04/25/2016 04:28 PM	On Leave	Returned From Leave	011-1E-011MA...	Adult Inpatie...	
04/25/2016 04:28 PM	08/09/2016 05:00 PM	Occupied		011-1E-011MA...	Adult Inpatie...	

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](#).



Inpatient Activity Details

Visit | Activity Details | Bed Charges | Charge Details

Activity

1666220 | Seaman, Hayden

Status: Occupied | Disposition: Went On Leave

Action: [Dropdown]

Program: Residential Region 1

Bed: R1H2 Bed 2 | [Bed Search...](#)

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Assignment Type: [Dropdown] | Reason: [Dropdown]

Location: Bayside Hos[] | Billing Procedure: Residential

Clinician: [Dropdown] | Physician: [Dropdown]

Start Date: 03/13/2018 | Time: 1:34 PM

End Date: [] | Time: []

Arrival Date: [] | Time: []

Overflow | Firm | Hold Bed

Only show beds for selected program | Non-Billable

Comments: [Text Area]

[Save] [Close] [X]

The Confirmation Message window is displayed.

7. Click the **Yes** button in the Confirmation Message window.
8. When the page is complete, click the **Save and Close** button in the tool bar.

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

The screenshot shows the 'Bedboard (56)' interface with various filters and a table of beds. The table columns include Bed, Unit, Client Type, Client Name, Status, Time, Flags, Admit Date, Program, and Primary Plan.

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

3. Filter the list to determine the records that are displayed.
4. Find the **client** whose scheduled discharge you want to change.
5. Click the **open book** icon () in the unnamed column for the client whose scheduled discharge you want to change.


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

The screenshot shows the 'Activity' section with a table of activity entries. The table columns include Start Date, End Date, Status, Disposition, Bed, Program, and Comment. A red arrow points to the third entry, which has a future end date and time, indicating a scheduled discharge.

Start Date	End Date	Status	Disposition	Bed	Program	Comment
04/04/2016 12:00 AM	04/07/2016 12:00 AM	Occupied	Went On Leave	011-1E-011MA...	Adult Inpatie...	
04/07/2016 12:00 AM	04/25/2016 04:28 PM	On Leave	Returned From Leave	011-1E-011MA...	Adult Inpatie...	
04/25/2016 04:28 PM	08/09/2016 05:00 PM	Occupied		011-1E-011MA...	Adult Inpatie...	

6. 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.

- On the scheduled discharge line, click on the **hyperlinked status** in the Status column.
The Inpatient Activity Details screen with the Activity Details tab active is displayed.

- Click the **trash can** icon () in the tool bar.
The Confirmation Message window is displayed.
- Click the **Yes** button.
- When the screen is complete, click the **Save and Close** button in the tool bar.

Discharge a Client

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](#)

Discharge a Client

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bedboard (56)

11/12/2019 All Units All Client Types All Statuses Other Apply Filter

All Programs

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Filter the list to determine the records that are displayed.
- Find the **client** you want to discharge.

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

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

The Census Management - Discharge screen is displayed.

Census Management - Discharge

Save and Close

Activity

1666220 Seaman, Hayd... DOB: 07/27/2003 Gender: Male Initial Admit Date/Time: 12/15/2016 12:00 AM

Action: Discharge Discharge Date: 11/11/2019 Time: 11:41 AM Firm Non-Billable Hold Bed

Program: Residential Region 1 Overflow

Bed: R1H2 Bed 2 (Adult) Bed Search... Only show beds for selected program

Unit: Skills R1 House 2 Client Type: Adult

Room: R1 House 2 Room 2 Discharge Type:

Comments:

Admission Type: Non-Crisis Admission Source:

Assignment Type: Reason:

Location: Bayside Hospital Billing Procedure: Residential

Clinician: Physician:

From

Program: Residential Region 1

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Bed: R1H2 Bed 2

Start Date/Time: 03/13/2018 01:34 PM

- Complete the **required and necessary** fields on the Census Management - Discharge screen. Refer to [Census Management - Discharge Screen Field Definitions](#) for information about each field.

Be sure to select the **Discharge Type**.

- When the screen is complete, click the **Save and Close** button in the tool bar.

The Bedboard list page is displayed. The client's record now lists a status of Discharged. An open book icon (📖) is displayed in the unnamed column.

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

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Filter the list to determine the records that are displayed.
- Find the **client** whose discharge you need to change.

- 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.

The screenshot shows the 'Inpatient Activity Details' window. At the top, there are tabs for 'Visit', 'Activity Details', 'Bed Charges', and 'Charge Details'. The 'Activity Details' tab is active. The form contains the following fields and values:

- Activity:** 1666220, Seaman, Hayden
- Status:** Occupied
- Disposition:** Discharged
- Start Date:** 03/13/2018
- Time:** 1:34 PM
- End Date:** (empty)
- Time:** (empty)
- Arrival Date:** (empty)
- Time:** (empty)
- Program:** Residential Region 1
- Bed:** R1H2 Bed 2
- Unit:** Skills R1 House 2
- Room:** R1 House 2 Room 2
- Assignment Type:** (empty)
- Reason:** (empty)
- Location:** Bayside Hosp
- Billing Procedure:** Residential
- Clinician:** (empty)
- Physician:** (empty)
- Checkboxes:** Overflow (unchecked), Firm (unchecked), Hold Bed (checked), Only show beds for selected program (checked), Non-Billable (checked)
- Comments:** (empty text area)

Notice that the Disposition is set to Discharged.

- Complete the **required and necessary** fields on the Census Management - Discharge screen. You can change any of the fields that are listed at the beginning of this task.
- When the screen is complete, click the **Save** button in the tool bar.

The Bedboard list page is displayed. The client's record now lists a status of Discharged. An open book icon (📖) is displayed in the unnamed column.

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.

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bedboard (56)

11/12/2019 All Units All Client Types All Statuses Other Apply Filter

All Programs

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Filter the list to determine the records that are displayed.
- Find the **client** whose discharge you want to delete.
- 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.

Inpatient Activity Details

Visit Activity Details Bed Charges Charge Details

Activity

1666220 Seaman, Hayden

Status: Occupied Disposition: Discharged

Action: [Dropdown]

Program: Residential Region 1

Bed: R1H2 Bed 2 [Bed Search](#)

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Assignment Type: [Dropdown] Reason: [Dropdown]

Location: Bayside Hosj Billing Procedure: Residential

Clinician: [Dropdown] Physician: [Dropdown]

Start Date: 03/13/2018 Time: 1:34 PM

End Date: [Dropdown] Time: [Dropdown]


Arrival Date: [Dropdown] Time: [Dropdown]

Overflow Firm Hold Bed

Only show beds for selected program Non-Billable

Comments: [Text Area]

Save [Trash Icon] [Close Icon]

- Verify the correct client, status and disposition are displayed.
- Click the **trash can** icon () in the tool bar.
- Click the **Yes** button in the Confirmation Message pop-up window.

The Confirmation Message window is displayed.

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

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

Inpatient Activity Details

Visit
Activity Details
Bed Charges
Charge Details

Visit Information

Visit Id: 392 Client: 166622 Seaman, Hayden Requested Date: Scheduled Date: Status: Admitted

Admit Date: 12/15/2016 Admit Time: 12:00 AM Discharged Date: Discharge Time: Modify...

Emergency Room Arrival Date: Emergency Room Arrival Time: Client Type: Adult ▼

Emergency Room Departure Date: Emergency Room Departure Time: DRG Code:

Admit Decision Date: Admit Decision Time: Discharge Type: ▼

Admission Type: Non-Crisis ▼ Admission Source: ▼

Bed Billing Procedure: Residential ▼ Leave Billing Procedure: Leave ▼

Activity

Start Date	End Date	Status	Disposition	Bed	Program	Comment
12/15/2016 12:00 AM	10/11/2017 04:40 PM	Occupied	Went On Leave	R1H2 Bed 2-R...	Residential R...	
10/11/2017 04:40 PM	03/13/2018 01:34 PM	On Leave	Returned From Leave	R1H2 Bed 2-R...	Residential R...	
03/13/2018 01:34 PM	11/13/2019 10:00 AM	Occupied		R1H2 Bed 2-R...	Residential R...	

- Click the **Exit** icon (✖) in the tool bar to exit the screen.

The Bedboard 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.

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](#)
- [Change a Discharge While On Leave Record](#)
- [Delete a Discharge Completed When a Client Is On Leave](#)

Discharge a Client On Leave

Follow the steps below to discharge a client while on leave.

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** who is on leave that you want to discharge. 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 screen is displayed.

Census Management - Discharge

Save and Close
?
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✖️

Activity

1666220 Seaman, Hayd... DOB: 07/27/2003 Gender: Male Initial Admit Date/Time: 12/15/2016 12:00 AM

Action: Discharge Discharge Date: 11/11/2019 Time: 11:41 AM Firm Non-Billable Hold Bed

Program: Residential Region 1 Overflow

Bed: R1H2 Bed 2 (Adult) Only show beds for selected program

Unit: Skills R1 House 2 Client Type: Adult

Room: R1 House 2 Room 2 Discharge Type:

Admission Type: Non-Crisis Admission Source:

Assignment Type: Reason:

Location: Bayside Hospital Billing Procedure: Residential

Clinician: Physician:

Comments:

Bed Search...

From

Program: Residential Region 1

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Bed: R1H2 Bed 2

Start Date/Time: 03/13/2018 01:34 PM

5. Complete the **required and necessary fields** on the Census Management - Discharge screen. You can enter the:

- Discharge Date
- Discharge Time
- Discharge Type
- Reason

Refer to [Census Management - Discharge Screen Field Definitions](#) for information about each field.

6. When the screen is complete, click the **Save and Close** button in the tool bar.

Change a Discharge While On Leave Record

Follow the steps below to make changes on the information entered for a discharge.

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

The screenshot shows the 'Bedboard (56)' application window. At the top, there are filters for date (11/12/2019), units (All Units), client types (All Client Types), statuses (All Statuses), and other options. Below the filters is a table with columns: Bed, Unit, Client Type, Client Name, Status, Time, Flags, Admit Date, Program, and Primary Plan. The table contains several rows of data, including one for 'Nelson, Richard' with status 'On Leave'.

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** who is on leave that you want to discharge.
4. Click the **hyperlinked status** in the Status column of the client whose discharge you want to change.

The Inpatient Activity Details screen is displayed with the Activity Details tab open.

The screenshot shows the 'Inpatient Activity Details' screen. The 'Activity Details' tab is selected. The form contains various fields for activity information, including a search bar for the client name (Seaman, Hayden), start and end dates, arrival date, and time. There are also checkboxes for 'Overflow', 'Firm', 'Hold Bed', and 'Non-Billable'. A 'Bed Search...' button is visible next to the 'Bed' field.

5. Change **any fields** on the Inpatient Activity Details page Activity Details tab. Refer to [Inpatient Activity Details Screen Activity Details Tab Field Definitions](#) for information about each field.
6. When the screen is complete, click the **Save and Close** button in the tool bar.

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 awhile 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 > **Bedboard** sub-banner.

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** who is discharged that you want to delete the discharge.
4. Click the **hyperlinked status** in the Status column of the client whose discharge you want to change.

The Inpatient Activity Details screen is displayed with the Activity Details tab open.

Inpatient Activity Details

Visit | **Activity Details** | Bed Charges | Charge Details

Activity

2104531 | Nosack, Claudia

Status: Occupied | Disposition: Discharged

Action: No actions available

Program: Adult Inpatient

Bed: 010-1E | [Bed Search...](#)

Unit: Pheasant Hollow

Room: 010MA

Assignment Type: Summit | Reason: Alcohol/Drug tre

Location: State-Operat | Billing Procedure: Discharge

Clinician: Allen, Jared | Physician: Armstrong, Katie

Start Date: 08/08/2016 | Time: 12:00 AM


End Date: 08/09/2016 | Time: 12:00 AM

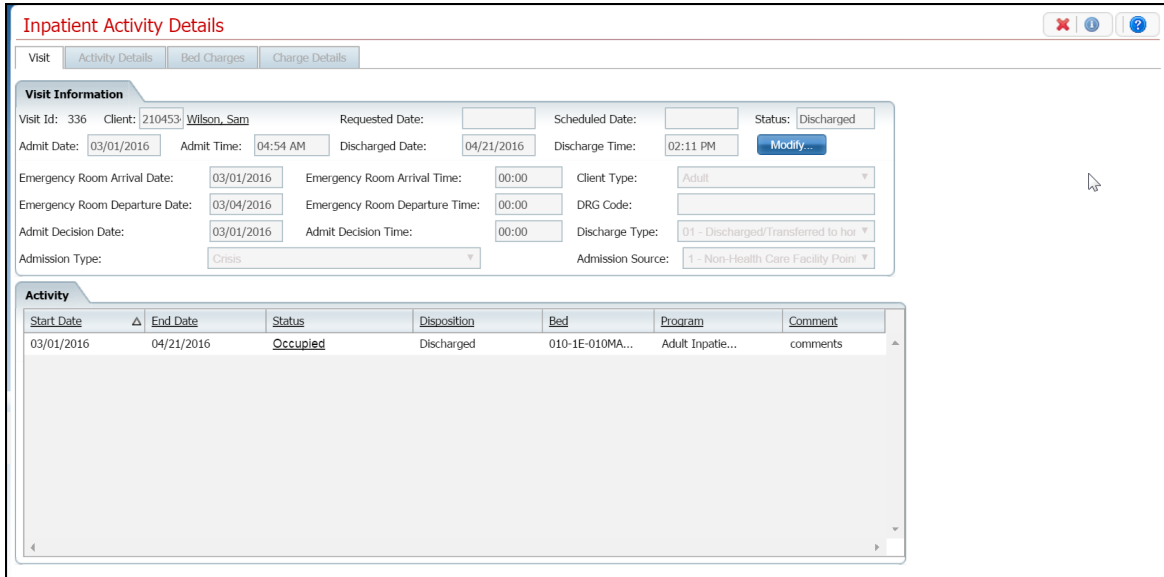
Arrival Date: | Time: 00:00

Overflow | Firm | Hold Bed

Only show beds for selected program | Non-Billable

Comments:

5. Click the **trash can** icon () in the tool bar 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.



Visit Information

Visit Id: 336 Client: Wilson, Sam Requested Date: Scheduled Date: Status: Discharged

Admit Date: 03/01/2016 Admit Time: 04:54 AM Discharged Date: 04/21/2016 Discharge Time: 02:11 PM [Modify...](#)

Emergency Room Arrival Date: 03/01/2016 Emergency Room Arrival Time: 00:00 Client Type: Adult

Emergency Room Departure Date: 03/04/2016 Emergency Room Departure Time: 00:00 DRG Code:

Admit Decision Date: 03/01/2016 Admit Decision Time: 00:00 Discharge Type: 01 - Discharged/Transferred to hot

Admission Type: Crisis Admission Source: 1 - Non-Health Care Facility Point

Activity

Start Date	End Date	Status	Disposition	Bed	Program	Comment
03/01/2016	04/21/2016	Occupied	Discharged	010-1E-010MA...	Adult Inpatie...	comments

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

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](#)
- [Change a Client's On Leave Setting](#)
- [Delete a Client's On Leave](#)

Before You Begin

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

Schedule a Client On Leave

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the client who you want to set on leave.
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 screen is displayed.

Census Management - Schedule On Leave

Activity

2104667 Shaw, Keith DOB: 11/05/1967 Gender: Male Initial Admit Date/Time: 03/28/2017 10:00 AM

Action: Schedule On Leave Scheduled Date: 11/14/2019 Time: 11:34 AM Firm Non-Billable Hold Bed

Program: Youth Residential Overflow

Bed: 009-1E (Adult) Bed Search... Only show beds for selected program

Unit: Pheasant Hollow Client Type: Adult

Room: 009MA Comments:

Admission Type: Non-Crisis Admission Source: 2 - Clinic referral

Assignment Type: Summit Reason:

Location: State-Operated Facility Billing Procedure: Leave

Clinician: Andes, Cynthia Physician: Sullivan, Kevin M

Return from Leave

5. Complete the **required and necessary fields** on the screen. Refer to [Census Management - Schedule On Leave Screen Field Definitions](#) for information about each field.
6. To Schedule Return from Leave for this client at this time, select the **Return from Leave** check box (outlined in red in the figure above).

The Return section is displayed at the bottom of the Census Management - Schedule Return On Leave screen.

Return

Action: Schedule return from leave Scheduled Return: Time:

Return Program: Youth Residential Overflow

Return Bed: 009-1E (Adult) Bed Search... Only show beds for selected program

Return Unit: Pheasant Hollow

Return Room: 009MA Comments:

Assignment Type: Summit Reason:

Location: State-Operated Facility Billing Procedure: Fix Care Res NO

7. Complete the **Return** section. Refer to [Census Management - Schedule On Leave Screen Field Definitions](#) for information about each field.
8. When the page is complete, click the **Save and Close** button in the tool bar.

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 > **Bedboard** sub-banner.

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.

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 Bedboard list page.

3. Find the **client** whose scheduled on leave setting you want to change.
4. Click the **Scheduled On Leave** hyperlink in the Status column for the client.

The Inpatient Activity Details screen is displayed with the Activity Details tab active.

Inpatient Activity Details

Visit | Activity Details | Bed Charges | Charge Details

Activity

1666220 | Seaman, Hayden

Status: Occupied | Disposition:

Action: [Dropdown]

Program: Residential Region 1

Bed: R1H2 Bed 2 | Bed Search...

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Assignment Type: [Dropdown] | Reason: [Dropdown]

Location: Bayside Hos | Billing Procedure: Residential

Clinician: [Dropdown] | Physician: [Dropdown]

Start Date: 03/13/2018 | Time: 1:34 PM

End Date: [Calendar] | Time: [Time]

Arrival Date: [Calendar] | Time: [Time]

Overflow | Firm | Hold Bed


Only show beds for selected program | Non-Billable

Comments: [Text Area]

[Save] [Delete] [Close]

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

- Change the Start Date
- Change or add one of the following Actions:

- On Leave - The Census Management - On Leave screen is displayed. Start with step 5.
 - Schedule Return From Leave - The Census Management - Schedule Return From Leave screen is displayed. Start with step 5.
6. When the screen is complete, click the **Save and Close** button in the tool bar.
 7. Click the Exit icon () in the tool bar to return to the Bedboard list page.

Note that the client's Scheduled On Leave status is no longer displayed and the current client record has a status of On Leave.

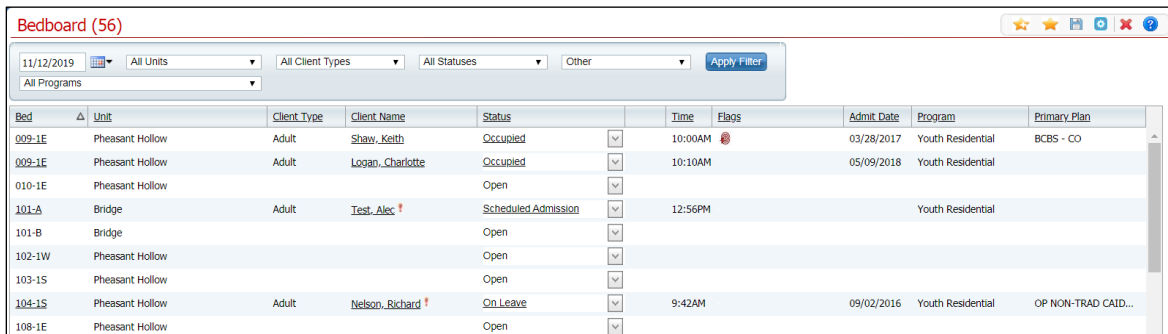
Delete a Client's Scheduled On Leave Setting




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 > **Bedboard** sub-banner.

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.



[Why Can't I Access This Screen?](#)



Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec 	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard 	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the client whose On Leave setting you want to change.
4. Click the **open book** icon () in the unnamed column for the client.

The Inpatient Activity Details screen 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** icon () in the tool bar.
The Confirmation Message window is displayed.
7. In the Confirmation Message window, click the **Yes** button.
The Inpatient Activity Details screen is displayed with the Visit tab active. The Scheduled On Leave record is deleted.
8. Click the **Exit** icon () in the tool bar.
On the Bedboard 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.

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](#)
- [Change a Client's On Leave Setting](#)
- [Delete a Client's On Leave](#)

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.

Set a Client's Status to On Leave

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the client who you want to set On Leave.
4. Click the **drop-down arrow** in the Status column of the client you want to set to On Leave and select **On Leave**.

The Census Management - On Leave screen is displayed.

Census Management - On Leave

Activity

Client ID: 2104609 | Client Name: Tesla, June | DOB: 08/08/1984 | Gender: Female | Initial Admit Date/Time: 09/02/2016 01:15 AM

Action: On Leave | Leave Start Date: 11/13/2019 | Time: 12:37 PM

Program: Portage ACT Team 1 | Overflow

Bed: 206-1E (Adult) | Only show beds for selected program

Unit: Pheasant Hollow | Client Type: Adult

Room: 206MB

Admission Type: Crisis | Admission Source: 1 - Non-Health C...

Assignment Type: Salt Lake County | Reason:

Location: State-Operated Fe... | Billing Procedure: Leave

Clinician: | Physician:

Return from Leave

From

Program: Portage ACT Team 1
 Unit: Pheasant Hollow
 Room: 206MB
 Bed: 206-1E
 Start Date/Time: 03/13/2018 10:42 AM

5. Complete the required and necessary fields on the Census Management - On Leave screen. Refer to [Census Management - On Leave Screen Field Definitions](#) for information about each field.
6. When the screen is complete, click the **Save and Close** button in the tool bar.

The Bedboard list page is displayed. A second record for the client is displayed with the status of On Leave.

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 > **Bedboard** sub-banner.

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** whose On Leave setting you want to change.
4. Click the **On Leave** hyperlink in the Status column for the client.

The Inpatient Activity Details screen is displayed with the Activity Details tab active.

5. Complete the **fields** on the Inpatient Activity Details page. Refer to [Inpatient Activity Details Screen Activity Details Tab Field Definitions](#) for information about each field.
 - Change the Start Date and End Date
 - Change or add one of the following actions:
 - Bed Change - use this [procedure](#) starting with step 4.
 - Transfer - use this [procedure](#) starting with step 5.
 - On Leave - use this [procedure](#) starting with step 5.
 - Discharge - 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.
6. When the screen is complete, click the **Save** button in the tool bar.
7. Click the **Exit** icon () to return to the Bedboard list page.

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 > **Bedboard** sub-banner.

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bedboard (56)

11/12/2019 All Units All Client Types All Statuses Other Apply Filter

All Programs

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** whose On Leave setting you want to change.
4. Click the **On Leave** hyperlink in the Status column for the client.

The Inpatient Activity Details screen is displayed with the Activity Details tab active.

Inpatient Activity Details

Visit Activity Details Bed Charges Charge Details

Activity

1666220 Seaman, Hayden

Status: Occupied Disposition:

Action:

Program: Residential Region 1

Bed: R1H2 Bed 2 Bed Search...

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Assignment Type: Reason:

Location: Bayside Hos Billing Procedure: Residential

Clinician: Physician:

Start Date: 03/13/2018 Time: 1:34 PM

End Date: Time:

Arrival Date: Time:

Overflow Firm Hold Bed

Only show beds for selected program Non-Billable

Comments:

5. Click the **trash can** icon () in the tool bar.

The Confirmation Message window is displayed.

6. Click the **Yes** button.

The Bedboard list page is displayed. The client's status is displayed as Occupied. The client record with a status of On Leave is no longer displayed.

Schedule a Client's Return From Leave

When you put a client On Leave, you can schedule the date for the client's return from leave to 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](#)
- [Change a Schedule Return From Leave](#)
- [Delete a Client's Scheduled Return from Leave](#)

Before You Begin

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

Schedule a Return From Leave

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the client who you want to schedule to return from leave.
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 screen is displayed.

5. Complete the required and necessary fields on the Census Management - Schedule Return From Leave screen. Refer to [Census Management - Schedule Return From Leave Field Definitions](#) for information about each field.
6. When the screen is complete, click the **Save and Close** button in the tool bar.

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 > **Bedboard** sub-banner.

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bedboard (56)

11/12/2019 All Units All Client Types All Statuses Other Apply Filter

All Programs

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Filter the list to determine the records that are displayed.
- Find the client who you want to change the scheduled return from leave.
- 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.

Inpatient Activity Details

Visit Activity Details Bed Charges Charge Details

Activity

1666220 Seaman, Hayden

Status: Occupied Disposition:

Action:

Program: Residential Region 1

Bed: R1H2 Bed 2 [Bed Search...](#)

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Assignment Type: Reason:

Location: Bayside Hosg Billing Procedure: Residential

Clinician: Physician:

Start Date: 03/13/2018 Time: 1:34 PM

End Date: Time:

Arrival Date: Time:

Overflow Firm Hold Bed

Only show beds for selected program Non-Billable

Comments:

Save

- 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 screen is displayed. Start with step 5.
 - Schedule Bed Change - The Census Management - Schedule Bed Change screen is displayed. Start with step 5.
 - Schedule Transfer - The Census Management - Schedule Transfer screen is displayed. Start with step 5.
 - Schedule On Leave - The Census Management - Schedule On Leave screen is displayed. Start with step 5.

Refer to [Inpatient Activity Details Screen Activity Details Tab Field Definitions](#) for information about each field.

- When the screen is complete, click the **Save** button in the tool bar.

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

Delete a Client's Schedule 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.

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


The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Filter the list to determine the records that are displayed.
- Find the client whose setting you want to change.
- Click the **Schedule Return From 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** icon () in the tool bar.


The Confirmation Message window is displayed.

6. Click the **Yes** button.

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

Start Date	End Date	Status	Disposition	Bed	Program	Comment
12/15/2016 12:00 AM	10/11/2017 04:40 PM	Occupied	Went On Leave	R1H2 Bed 2-R...	Residential R...	
10/11/2017 04:40 PM	03/13/2018 01:34 PM	On Leave	Returned From Leave	R1H2 Bed 2-R...	Residential R...	
03/13/2018 01:34 PM	11/13/2019 10:00 AM	Occupied		R1H2 Bed 2-R...	Residential R...	

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

7. Click the **Exit** icon () in the tool bar to close the page.

The Bedboard list page is displayed. The client's status is displayed as Occupied.

Return a Client From Leave

When a client returns from leave, change the status for the client in Bedboard to Return From Leave. Return From Leave places the client back in the bed they occupied before leave, unless you change the bed. 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 Leave setting:

- [Return a Client from Leave](#)
- [Delete a Client's Return From Leave](#)

Before You Begin

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

Return From Leave

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** who you want to return from leave.
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 screen is displayed.

Census Management - Return From Leave Save and Close

Activity

1578270 **Brown, Nicol...** DOB: 12/25/1970 Gender: Female Initial Admit Date/Time: 11/04/2016 12:00 AM

Action: Return From Leave Return Date: 11/13/2019 Time: 12:25 PM Firm Non-Billable Hold Bed

Program: Residential Region 1 Overflow

Bed: R1H1 Bed 2 (Adult) Bed Search... Only show beds for selected program

Unit: Skills R1 House 1 Client Type: Adult

Room: R1 House 1 Room 2 Comments:

Admission Type: Non-Crisis Admission Source:

Assignment Type: Reason:

Location: 54 Oak Dr. Billing Procedure: Residential

Clinician: Physician:

From

Program: Residential Region 1

Unit: Skills R1 House 1

Room: R1 House 1 Room 2

Bed: R1H1 Bed 2

Start Date/Time: 04/26/2018 12:00 AM

5. Complete the **required and necessary fields** on the screen. Refer to [Census Management - Schedule Return From Leave Field Definitions](#) for information about each field.
6. When the screen is complete, click the **Save and Close** button in the tool bar.

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 > **Bedboard** sub-banner.


The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

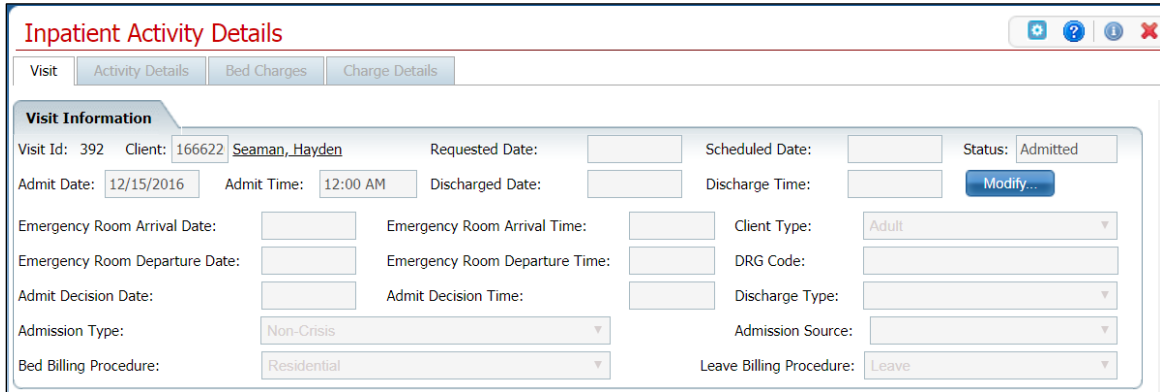
Bedboard (56)

11/12/2019 All Units All Client Types All Statuses Other Apply Filter

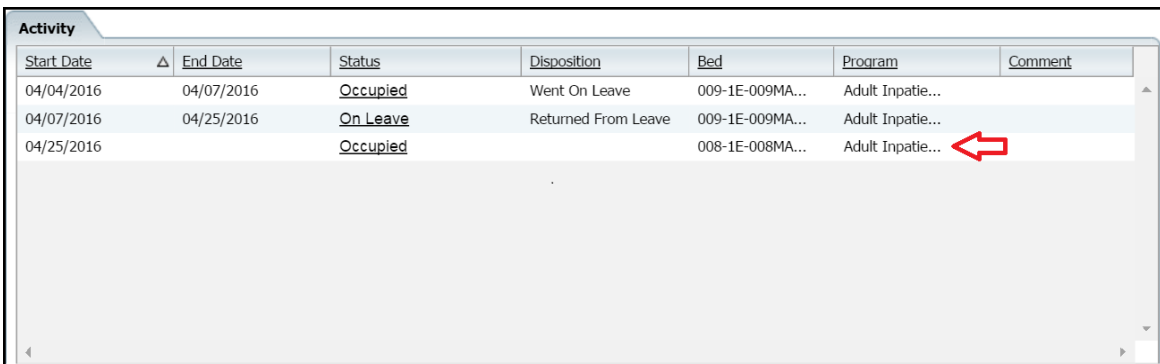
Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** whose Return From Leave setting you want to change.
4. Click the **open book** icon () in the unnamed column on the client's record.

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



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.



Start Date	End Date	Status	Disposition	Bed	Program	Comment
04/04/2016	04/07/2016	Occupied	Went On Leave	009-1E-009MA...	Adult Inpatie...	
04/07/2016	04/25/2016	On Leave	Returned From Leave	009-1E-009MA...	Adult Inpatie...	
04/25/2016		Occupied		008-1E-008MA...	Adult Inpatie...	

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


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

8. Click the **trash can** icon () in the tool bar.

The Confirmation Message window is displayed.

9. Click the **Yes** button.

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

10. Click the **Exit** icon () in the tool bar to close the page.

The Bedboard list page is displayed. The client's status is On Leave. The record with the status of Returned From Leave is no longer displayed.

Swap Beds

Swap Beds is an action that lets you move two clients to each other's beds. You can perform these tasks to swap beds:

- [Swap Beds](#)
- [Change Swapped Beds](#)
- [Undo Swapped Beds](#)
- [Delete Swapped Beds](#)

Before You Begin

You need to know the clients' names and bed IDs to complete any of these procedures. Both clients must have a status of Occupied.

To Swap Beds

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

The screenshot shows the 'Bedboard (56)' interface. At the top, there are filters for date (11/12/2019), units (All Units), client types (All Client Types), statuses (All Statuses), and other options. Below the filters is a table with the following columns: Bed, Unit, Client Type, Client Name, Status, Time, Flags, Admit Date, Program, and Primary Plan. The table contains several rows of data, including clients like Shaw, Keith (Occupied), Logan, Charlotte (Occupied), Test, Alec (Scheduled Admission), and Nelson, Richard (On Leave).

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find one of the **clients** who wants to swap beds.

Tip: Click on the **hyperlinked heading** in the Client Name column to arrange the clients in alphabetical order.

4. Click the **drop-down arrow** in the Status column for the client who is swapping a bed and select **Swap Beds**.

The Swap Beds window is displayed. The Bed1 section displays the client's information you selected on the Bedboard list page. Refer to [Swap Bed Window Field Definitions](#) for information about each field.

SmartCare

Bed1

Bed: 103-15(Adult) Client : Apodaca, Sabrina(1732640)
 Unit: Pheasant Hollow
 Room: 103WB

Bed2

Date: 08/08/2016 Time: 12:00 AM
 Bed2: Client :
 Unit:
 Room:

OK Cancel

- Complete the **Bed2** section with the information on the second client who wants to swap beds. Refer to [Swap Bed Window Field Definitions](#) for information about each field.
- Click the **OK** button to save the changes.

The Bedboard list page is displayed with the original client's occupied bed listed with a status of Bed Changed and a second listing with the second client shown in that bed with a status of Occupied.

Change Swapped Beds

The most accurate way to change swapped beds is to re-swap the beds back to the original occupancies. This ensures that the bed occupancy remains accurate.

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

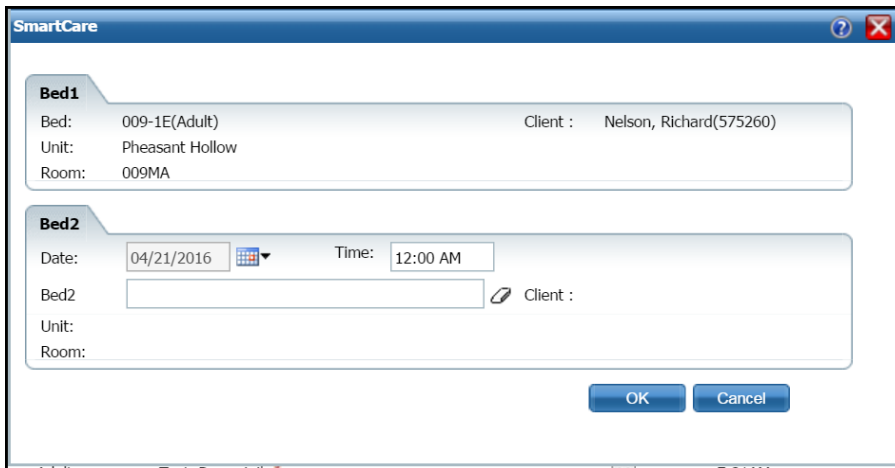
Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
002-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Find the **client and bed** you want to re-swap beds.

Tip: Click on the **hyperlinked heading** in the Client Name column to arrange the clients in alphabetical order.

3. Click the **drop-down arrow** in the Status column for the client who is swapping a bed and select **Swap Bed**.

The Swap Bed window is displayed. The Bed1 section displays the client you selected on the Bedboard list page.



4. Complete the **Bed2** section with the information on the second client who wants to swap beds. Refer to [Swap Bed Window Field Definitions](#) for information about each field.

Undo Swapped Beds

The most accurate way to undo swapped beds is to re-swap the beds back to the original occupancies. This ensures that the bed occupancy remains accurate.

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Find the **client and bed** you want to re-swap bed.
3. Click the **drop-down arrow** in the Status column for the client who is swapping a bed and select **Swap Bed**.

The Swap Bed window is displayed. The Bed1 section displays the client you selected on the Bedboard list page.

4. Complete the **Bed2** section with the information on the second client who wants to swap beds. View [field definitions](#).
5. Click the **OK** button to save the changes.

The Bedboard list page is displayed with the original client's occupied bed listed with a status of Bed Changed and a second listing with the second client shown in that bed with a status of Occupied.

Delete Swapped Beds

The most accurate way to delete swapped beds is to use the [Undo Swapped Beds](#) task to swap the beds back to the original occupancies. This ensures that the bed occupancies remain accurate.

Swing Bed

The Swing Bed option gives you the ability to change bed details for an open bed from the Bedboard list page. When you make changes using Swing Bed, the changes are updated on the Bedboard list page and also on the Units/Rooms/Bed list page in Administration.

Swing a Bed

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **bed** you want to change. It must have a status of Open. Refer to [Search for a Bed](#) for more information.
4. Click the **drop-down arrow** in the Status column of the open bed you want to swing and select **Swing Bed**.

The Census Management - Swing Bed screen is displayed.

[Why Can't I Access This Screen?](#)

Census Management – Swing Bed

Activity

Action: Swing Bed

Start Date: [] Time: [] End Date: [] Time: []

Program: Youth Residential

Bed: 1101-B Leave Procedure: Leave

Unit: Adult Inpatient Procedure: Residential Day

Room: 1101 Location: 4101 N Ravenswood1

From

Bed: 1101-B Program: Youth Residential

Unit: Adult Inpatient Procedure: Residential Day

Room: 1101

5. Complete the **required and necessary fields** on the screen. Refer to [Census Management - Swing Bed Screen Field Definitions](#) for information about each field.
6. When the screen is complete, click the **Save and Close** button in the tool bar.

A record of the change is displayed on both the Bedboard list page and the Units/Rooms/Bed list page in the Administration tab.

Schedule Transfer

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.

Schedule a Client's Transfer

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

The screenshot shows the 'Bedboard (56)' application window. At the top, there is a navigation bar with a date '11/12/2019' and several filter dropdown menus: 'All Units', 'All Client Types', 'All Statuses', and 'Other'. An 'Apply Filter' button is located to the right of these filters. Below the filters is a table with the following columns: Bed, Unit, Client_Type, Client_Name, Status, Time, Flags, Admit_Date, Program, and Primary_Plan. The table contains several rows of data, including beds 009-1E, 010-1E, 101-A, 101-B, 102-1W, 103-1S, 104-1S, and 108-1E. The 'Status' column for each row has a small downward-pointing arrow (drop-down arrow) next to it.

Bed	Unit	Client_Type	Client_Name	Status	Time	Flags	Admit_Date	Program	Primary_Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to determine the records that are displayed.
3. Find the **client** on the Bedboard 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 screen is displayed.

[Why Can't I Access This Screen?](#)

5. Search for and select an **open bed** in the new program.

The Census Management - Schedule Transfer screen is displayed with the new program and bed information filled in.

6. Complete the remaining **required and necessary fields** fields on the screen. Refer to [Census Management - Schedule Transfer Screen Field Definitions](#) for information about each field.
7. When the screen is complete, click the **Save and Close** button in the tool bar.

Transfer

When you transfer a client, you are transferring the client 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](#) task.

Before You Begin

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

Transfer a Client

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bedboard (56)

11/12/2019 All Units All Client Types All Statuses Other Apply Filter

All Programs

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

- Filter the list to display the correct Unit, Rooms, Beds and Programs.
- Find the **client** on the Bedboard list page. Tip: Click on the Client Name heading in the column to arrange the clients' names alphabetically.
- Click the **drop-down arrow** in the Status column and select **Transfer**.

The Census Management - Transfer screen is displayed. View field definitions.

Census Management - Transfer

Save and Close

Activity

575260 Nelson, Rich... DOB: 08/24/1965 Gender: Male Initial Admit Date/Time: 04/04/2016 12:00 AM

Action: Transfer Transfer Date: 04/21/2016 Time: Non-Billable Hold Bed

Arrival Date: Time:

Program: Bed Search... Only show beds for selected program

Unit: Client Type: Adult

Room: Comments:

Admission Type: Crisis Admission Source: Reason:

Assignment Type: Summit Billing Procedure: Fix Care Res NO

Location: State-Operated Fi Physician:

From

Program: Adult Inpatient

Unit: Pheasant Hollow

Room: 009MA

Bed: 009-1E

Start Date/Time: 04/04/2016 12:00 AM

- In the Program field, select the **new program** to transfer the client to.
 - Search for and select an **open bed** in the new program.
- The Census Management - Transfer screen is displayed with the new program and bed information filled in.
- Complete the remaining fields on the Census Management - Transfer page. Refer to [Census Management - Transfer Screen Field Definitions](#) for information about each field.
 - When the screen is complete, click the **Save and Close** button in the tool bar.

The Bedboard list page is displayed.

Export Bedboard Data


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

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. If needed, change the filters. All the record lines that are displayed on the list page are exported to the Excel spreadsheet.
3. Click the **Export** icon () in the tool bar.

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



4. Click on the **ExportData** file button in the tool 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.

Status Actions

From the Bedboard list page, click the down arrow to view which actions can be performed.

When the Status is...	Then you can perform this action...
Occupied	<ul style="list-style-type: none"> • Bed Change - use this procedure. • Transfer - use this procedure. • On Leave - use this procedure. • Discharge - use this procedure. • Schedule Bed Change - use this procedure. • Schedule Transfer - use this procedure. • Schedule On Leave - use this procedure. • Schedule Discharge - use this procedure. • Swap Beds - use this procedure. <p>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 Modify Visit Information.</p>
On Leave	<ul style="list-style-type: none"> • Return from Leave - use this procedure. • Schedule Return from Leave - use this procedure. • Discharge - use this procedure.
Discharged	No actions are available.
Returned From Leave	No actions are available.
Scheduled Bed Change	<ul style="list-style-type: none"> • Bed Change - use this procedure.
Scheduled Transfer	<ul style="list-style-type: none"> • Transfer - use this procedure. • Schedule Bed Change - use this procedure. • Schedule On Leave - use this procedure.
Scheduled Discharge	<ul style="list-style-type: none"> • Discharge - use this procedure. • Bed Change - use this procedure. • Transfer - use this procedure. • On Leave - use this procedure. • Schedule Bed Change - use this procedure. • Schedule Transfer - use this procedure. • Schedule On Leave - use this procedure.
Scheduled Discharge C	<ul style="list-style-type: none"> • Discharge - use this procedure. • Bed Change - use this procedure. • Transfer - use this procedure. • On Leave - use this procedure. • Schedule Bed Change - use this procedure. • Schedule Transfer - use this procedure. • Schedule On Leave - use this procedure.
Blocked	<ul style="list-style-type: none"> • Unblock - use this procedure.

Inpatient Activity Details

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

On the Inpatient Activity Details screen, you can perform new activities and 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 table in [Change an Activity](#) for more information.

Access Inpatient Activity Details From the Bedboard List Page

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alex	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Filter the list to display the information you want.
 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 screen, click on the:
 - **hyperlinked status** - to display the Inpatient Activity Details screen with the Activity Details tab active.
- or -
- **open book** icon in the column to the right of the drop-down arrows - to display the Inpatient Activity Details screen with the Visit tab active.

The Inpatient Activity Details screen is displayed.

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

The Bedboard list page is displayed. Refer to [Bedboard List Page Field Definitions](#) for information about each field.

[Why Can't I Access This Screen?](#)

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
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101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

2. Find the **client** you want to work with.
3. Click the **hyperlinked status** in the Status column.

The Inpatient Activity Details screen with the Activity Details tab active is displayed.

Inpatient Activity Details

Visit | Activity Details | Bed Charges | Charge Details

Activity

1666220 Seaman, Hayden

Status: Occupied Disposition:

Action: [Dropdown]

Program: Residential Region 1

Bed: R1H2 Bed 2 [Bed Search...](#)

Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Assignment Type: [Dropdown] Reason: [Dropdown]

Location: Bayside Hos[Dropdown] Billing Procedure: Residential

Clinician: [Dropdown] Physician: [Dropdown]

Start Date: 03/13/2018 Time: 1:34 PM

End Date: [Dropdown] Time: [Dropdown]

Arrival Date: [Dropdown] Time: [Dropdown]

Overflow Firm Hold Bed

Only show beds for selected program Non-Billable

Comments:

4. 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	<ul style="list-style-type: none"> • Bed Change - use this procedure starting with step 4. • Transfer - use this procedure starting with step 5. • On Leave - use this procedure starting with step 5. • Discharge – 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. • Schedule Discharge - use this procedure starting with step 5. <p>Note: If none of these actions is available, it means a client has another future action already performed. Refer to Modify Visit Information.</p>
On Leave	<ul style="list-style-type: none"> • Return from Leave - use this procedure starting with step 5. • Schedule Return from Leave - use this procedure starting with step 5. • Discharge - use this procedure starting with step 5.
Discharged	No actions are available.
Returned from Leave	No actions are available.
Scheduled Admission	<ul style="list-style-type: none"> • Admit - use this procedure starting with step 7. • Cancel Admission - use this procedure starting with step 5.
Scheduled Bed Change	<ul style="list-style-type: none"> • Bed Change - use this procedure starting with step 4.
Scheduled Return from Leave	<ul style="list-style-type: none"> • 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.
Scheduled Discharge	<ul style="list-style-type: none"> • Discharge - use this procedure starting with step 5. • Bed Change - use this procedure starting with step 4. • Transfer - use this procedure starting with step 5. • On 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.

<p>Scheduled Discharge C</p>	<ul style="list-style-type: none"> • Discharge - use this procedure starting with step 5. • Bed Change - use this procedure starting with step 4. • Transfer - use this procedure starting with step 5. • On 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.
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[Why Can't I Access These Screens?](#)

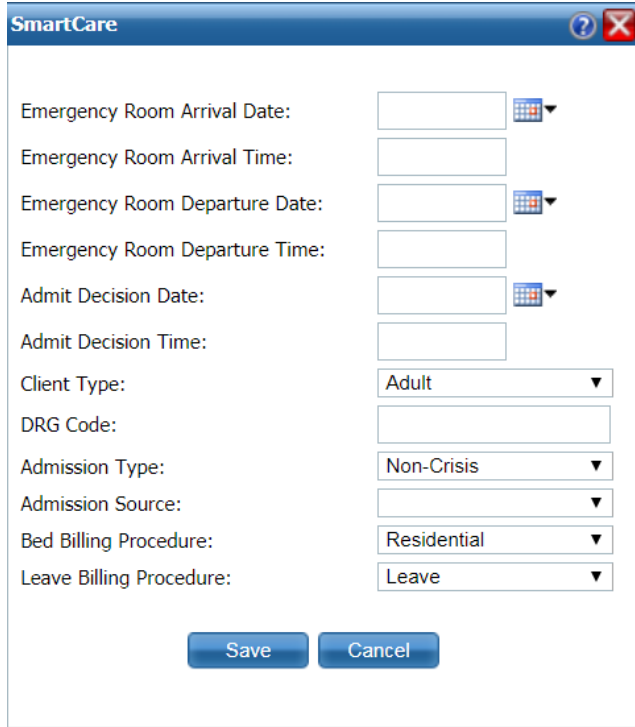
Modify Visit Information

You can modify the following visit information for a client:

- 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

Follow the steps below to modify visit information:

1. Display the Inpatient Activity Details page for the client.
[Access Inpatient Activity Details From the Bedboard List Page](#)
2. Make sure the **Visit** tab is active.
3. In the Visit Information section, click the **Modify** button. A pop-up window is displayed.



The image shows a 'SmartCare' window with a blue title bar containing a question mark and a close button. The window contains a form with the following fields:

- Emergency Room Arrival Date: (with a calendar icon)
- Emergency Room Arrival Time:
- Emergency Room Departure Date: (with a calendar icon)
- Emergency Room Departure Time:
- Admit Decision Date: (with a calendar icon)
- Admit Decision Time:
- Client Type: (dropdown menu)
- DRG Code:
- Admission Type: (dropdown menu)
- Admission Source: (dropdown menu)
- Bed Billing Procedure: (dropdown menu)
- Leave Billing Procedure: (dropdown menu)

At the bottom of the window are two buttons: 'Save' and 'Cancel'.

4. Type or change information in the fields. Refer to [Inpatient Activity Details Screen Visit Tab Modify Window Field Definitions](#) for information about each field.
5. When you have made all changes, click the **Save** button.

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

[Why Can't I Access These Screens?](#)

Search for a Bed

1. In the Activity section, click the **Bed Search** button.

The Bed Search screen is displayed.

The screenshot shows the SmartCare Bed Search interface. The search form includes the following fields:

- From: 04/25/2016
- To: (empty)
- Bed Name: (empty)
- Program: All Programs
- Unit: All Units
- Type 1: All Types
- Type 2: All Types
- Type 3: All Types
- Type 4: All Types

A Search button is located at the bottom right of the form. Below the form is a Record Found section with a table listing search results.

Bed	Room	Unit	Program	Start Date	End Date	Type 1	Type 2	Type 3	Type 4
<input type="radio"/> 008-1E	008MA	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 010-1E	010MA	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 102-1W	102WB	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 104-1S	104WB	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 108-1E	108MA	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 110-2-1W	110WC2	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 111-1N	111WB	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 112-1W	112WB	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 201-1W	201MB	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 202-1W	202MB	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 203-1W	203MB	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 204-1S	204WB	Pheas...	Adult Inpatient	01/01/1990			Adult		
<input type="radio"/> 205-1S	205WB	Pheas...	Adult Inpatient	01/01/1990			Adult		

2. Filter the list to determine the records that are displayed.
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 screen you were working on is re-displayed.

[Why Can't I Access These Screens?](#)

Field Definitions

Bedboard List Page Field Definitions

Bed	Unit	Client Type	Client Name	Status	Time	Flags	Admit Date	Program	Primary Plan
009-1E	Pheasant Hollow	Adult	Shaw, Keith	Occupied	10:00AM		03/28/2017	Youth Residential	BCBS - CO
009-1E	Pheasant Hollow	Adult	Logan, Charlotte	Occupied	10:10AM		05/09/2018	Youth Residential	
010-1E	Pheasant Hollow			Open					
101-A	Bridge	Adult	Test, Alec *	Scheduled Admission	12:56PM			Youth Residential	
101-B	Bridge			Open					
102-1W	Pheasant Hollow			Open					
103-1S	Pheasant Hollow			Open					
104-1S	Pheasant Hollow	Adult	Nelson, Richard *	On Leave	9:42AM		09/02/2016	Youth Residential	OP NON-TRAD CAID...
108-1E	Pheasant Hollow			Open					

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 area	
Date	Select a date from the calendar to limit the items listed to those admitted on this date.
All Units	Select a unit from the drop-down list to filter records to display in the list area of the page.
All Client Types	Select a client type from the drop-down list to filter records to display in the list area of the page.
All Statuses	Select a status from the drop-down list to filter records to display in the list area of the page.
Other	The Other drop-down only displays if your organization has selected to use this field. The options in the list are customizable by your organization.
Apply Filter button	Click this button to apply the filter settings and display the results.
All Programs	Select a program from the drop-down list to view only clients admitted to the selected program. The list includes all programs and all programs set up for the Residential facilities.
List area	
Bed	Bed the client occupies.
Unit	Unit where the client resides.
Client Type	Type of client as defined in the All Client Types drop-down in the filter area.
Client Name	Name of the client occupying the bed. Click on the client's name to display the Client Summary for the client.
Status	Current status of the client. View Statuses . Click the down arrow to see a list of possible next statuses.
Note	Identifies there is information about the activity on the client's current visit. Click the open book icon to view the Inpatient Activity Details screen.
Time	Time that the client was admitted to the bed.
Flags	Flags are inserted to identify special considerations about the client.
Admit Date	Date the client was admitted.

Field	Description
Program	Program the client is registered in.
Primary Plan	Client's primary insurance plan.

Block Bed 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
Start Date* and Time*	<p>Start date and time to block the bed.</p> <p>Enter the date in the mm/dd/yyyy format or click the calendar icon to navigate through the calendar and select the date.</p> <p>Clicking the double caret (<< or >>) in the calendar navigates you backward or forward by one year. Clicking the single caret (< or >) navigates you backward or forward by one month. See areas outlined in red below.</p> <p>For pre-set dates, click the applicable hyperlink in the Streamline Date/Time Language section at the bottom of the pop-up calendar.</p>
End Date* and Time*	<p>End date and time to block the bed.</p> <p>Enter the date in the mm/dd/yyyy format or use the calendar icon to select the date.</p> <p>Enter a time and include AM or PM.</p>
Blocked Reason*	Select the reason from the drop-down list.
Blocked Bed	Enter any comments. An unlimited number of characters is allowed.

Census Management - Admit Screen Field Definitions

Census Management - Admit

Save and Close
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Activity

... 2104845 Smith, Gertr... DOB: 01/02/1934 Gender: Female Scheduled Date/Time:

Action: Admit Firm Non-Billable Hold Bed

Admit Date: 📅 Time: Expected Discharge Date: 📅 Time:

Arrival Date: 📅 Time: Admit Decision Date: 📅 Time:

Emergency Room Arrival: 📅 Time:

Emergency Room Departure: 📅 Time:

Program: ▼

Bed: ▼ Bed Search... Overflow

Unit: Pheasant Hollow Only show beds for selected program

Room: 103WB Client Type: ▼

Admission Type: ▼ Admission Source: ▼ Comments:

Assignment Type: ▼ Reason: ▼

Location: ▼ Billing Procedure: ▼

Clinician: ▼ Physician: ▼

Firm Non-Billable Hold Bed


Overflow


Only show beds for selected program

Client Type: ▼

Comments:

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.
Client ID	The client's ID appears from the client's registration information.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
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.
Firm check box	This check box is disabled.
Non-Billable check box	Select this check box to identify the admission is non-billable.
Hold Bed check box	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.

Field	Description
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	This check box is disabled.
Bed	Identifies the bed the client is being admitted to. Click the drop-down arrow to change the bed selection.
 Bed Search button	Click this button to search for an open bed. Refer to Search for a Bed for more information.
Only show beds for selected program check box	Select this check box so when using Bed Search, only the beds available for the selected program are displayed.
Unit	Unit where the client is being admitted.
Client Type*	Client type.
Room	Room selected from the bed search.
Comments	Enter comments as needed for the admission. An unlimited number of characters is allowed.
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	Source of the admission.
Assignment Type	The Assignment Type. Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Reason for the admission.
Location	Location of the facility.
Billing Procedure	Procedure code to use for billing for the services.
Clinician	Client's clinician.
Physician	Client's physician.

Census Management - Bed Change Screen Field Definitions

Census Management - Bed Change

Save and Close
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Activity

Tenant, Lei

DOB: 12/15/1988

Gender: Female

Initial Admit Date/Time: 09/08/2016 12:00 AM

Action: Bed Change Change Date: 09/08/2016 Time: 12:00 AM Firm Non-Billable Hold Bed

Program: Youth Residential Overflow

Bed: 207-1E (Adult) Bed Search... Only show beds for selected program

Unit: Pheasant Hollow Client Type: Adult

Room: 207MB Comments:

Admission Type: Non-Crisis Admission Source: 1 - Non-Health C

Assignment Type: Summit Reason: Alcohol/Drug trea


Location: State-Operated F Billing Procedure: Fix Care Res NO


Clinician: Li, Lei Physician: Adams, Joe

From

Program: Youth Residential
 Unit: Pheasant Hollow
 Room: 112WB
 Bed: 112-1W
 Start Date/Time: 02/28/2017 09:00 PM

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 area	
	The Client Search button is grayed out (displayed as a gray box) on this screen because you cannot change a client that is associated with a bed at this point in the process.
Client ID	Client's ID appears from the client's registration information.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Initial Admit Date/Time	When the client was first admitted for this visit and the time of admission.
Action	Action you are taking for the client. For this task, Bed Change should be displayed.
Change Date Time	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 check box is disabled.
Program	Client's current program. This field is not editable.
Overflow	This check box is disabled.
Bed*	The bed the client is changing to.

Field	Description
 Bed Search button	Click this button to find a bed. Refer to Search for a Bed for more information.
Only show beds for selected program check box	This field is disabled.
Unit	Unit where the client is admitted.
Client Type	Client type.
Room	Room where the selected bed is located.
Comments	Enter comments as needed for this action. An unlimited number of characters is allowed.
Admission Type	Admission Type selected at the time of admission. This field is not editable.
Admission Source	Source of the admission selected at the time of admission. This field is not editable.
Assignment Type	The Assignment Type. Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Reason for the admission.
Location	Location of the facility.
Billing Procedure	Procedure code to use for billing for the services.
Clinician	Client's clinician for this visit.
Physician	Client's physician.
From area	
Program	Program the client is enrolled in.
Unit	Unit where the client's bed is located.
Room	Room where the client's bed is located.
Bed	Bed the client is currently occupying.
Start Date/Time	Start date and time of the client occupying the listed bed.

Census Management - Cancel Admission Screen 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
	The Client Search button is grayed out (displayed as a gray box) on this screen because you cannot change a client that is associated with a bed at this point in the process.
Client ID	Client's ID from the client's registration information.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Scheduled Date Time	Select the date you expect to admit the client. Defaults to the current day's date.
Action	Action you are taking for the client. The field should display Cancel Admission.
Cancel Date Time	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	Program the client is registered in. This field is disabled.
Overflow	This check box is disabled.
Bed	Bed you selected from the Bedboard list page for this admission. This field is disabled.
Only show beds for selected program	This check box is disabled.
Unit	Unit where the client was scheduled for admission. This field is not editable.
Client Type*	Client type.
Room	Room where the client was scheduled for admission.
Comments	Enter comments as needed for canceling the scheduled admission. An unlimited number of characters is allowed.

Field	Description
Admission Type*	Select whether the admission is Crisis or Non Crisis. This field is not editable.
Admission Source	Source of the admission. This field is not editable.
Assignment Type	The Assignment Type. Assignment type is a customizable set of categories that can be used by each organization as needed. This field is not editable.
Reason*	Select the reason for the cancellation.
Location	Location of the facility. This field is not editable.
Billing Procedure	Procedure code to use for billing for the services. This field is not editable.

Census Management - Discharge Screen Field Definitions

Census Management - Discharge

Save and Close
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Activity

[Seaman, Hayd...](#)

DOB: 07/27/2003

Gender: Male

Initial Admit Date/Time: 12/15/2016 12:00 AM

Action: Discharge Discharge Date: Time: Firm Non-Billable Hold Bed

Program: Overflow

Bed: Only show beds for selected program

Unit: Skills R1 House 2 Client Type:

Room: R1 House 2 Room 2 Discharge Type:

Admission Type: Admission Source:

Assignment Type: Reason:

Location: Billing Procedure:


Clinician: Physician:

Comments:

From

Program: Residential Region 1
 Unit: Skills R1 House 2
 Room: R1 House 2 Room 2
 Bed: R1H2 Bed 2
 Start Date/Time: 03/13/2018 01:34 PM

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 area	
	The Client Search button is grayed out (displayed as a gray box) on this screen because you cannot change a client that is associated with a bed at this point in the process.
Client ID	Client's ID from the client's registration information.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Initial Admit Date/Time	Client's initial admission date and time.
Action	Action you are taking for the client. For this procedure, Discharge should be displayed.
Discharge Date and Time	Date the client is being discharged. Defaults to today's date and the current time. Use the calendar icon to select a new date, if needed.
Firm check box	This check box is disabled.
Non-Billable check box	Select this check box if the activity is non-billable.

Field	Description
Hold Bed check box	This check box is disabled.
Program	Program the client is being discharged from. This field is disabled.
Overflow check box	This check box is disabled.
Bed	Bed the client is being discharged from. This field is disabled.
Bed Search	This field is disabled.
Only show beds for selected program	This check box is disabled.
Unit	Unit from which the client is being discharged.
Client Type	Client type. This field is disabled.
Room	Room the client is currently occupying.
Discharge Type*	Select the reason for the discharge.
Comments	Enter comments as needed for the discharge. An unlimited number of characters is allowed.
Admission Type	Whether the admission is Crisis or Non Crisis. This field is not editable.
Admission Source	Source of the admission. This field is not editable.
Assignment Type	The Assignment Type is a customizable set of categories that can be used by each organization as needed. This field is not editable.
Reason	Select the reason for the discharge.
Location	Location of the facility. This field is not editable.
Billing Procedure	Procedure code to use for billing for the services. This field is not editable.
Clinician	Clinician assigned to the client. This field is not editable.
Physician	Physician assigned to the client. This field is not editable.
From area	
Program	Program the client is being discharged from.
Unit	Unit the client is being discharged from.
Room	Room the client is being discharged from.
Bed	Bed the client is being discharged from.
Start Date/Time	Start Date and Time for the current activity being completed.

Census Management - On Leave Screen Field Definitions

Census Management - On Leave

Save and Close
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Activity

[Tesla, June](#)

DOB: 08/08/1984

Gender: Female

Initial Admit Date/Time: 09/02/2016 01:15 AM

Action: On Leave Leave Start Date: Time:

Program:

Overflow

Bed:

Only show beds for selected program

Unit: Pheasant Hollow Client Type:

Room: 206MB Comments:

Admission Type:

Admission Source:

Assignment Type:

Reason:

Location:

Billing Procedure:

Clinician:

Physician:

Return from Leave

From

Program: Portage ACT Team 1

Unit: Pheasant Hollow


Room: 206MB

Bed: 206-1E

Start Date/Time: 03/13/2018 10:42 AM

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 area	
	The Client Search button is grayed out (displayed as a gray box) on this screen because you cannot change a client that is associated with a bed at this point in the process.
Client ID	Client's ID from the client's registration information.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Initial Admit Date/Time	Date and time of the client's initial admission.
Action	Action you are taking for the client. It should display "On Leave" for this procedure.
Leave Start Date and Time*	Date the client's leave begins. Defaults to the current day's date and time. Use the calendar icon to change the date.
Firm check box	This check box is disabled.
Non-Billable check box	Select this check box to identify that the admission is non-billable.
Hold Bed check box	Select this check box to indicate that you want to hold the selected bed for this action on the client's visit.

Field	Description
Program	Program the client is being admitted to. Click the drop-down arrow to change the program.
Overflow	This check box is disabled.
Bed	Bed the client is being admitted to. This field is disabled.
 Bed Search button	Click this button to search for a bed. Refer to Search for a Bed for more information.
Only show beds for selected program	This check box is disabled.
Unit	Unit to which the client is being admitted. This field is not editable.
Client Type	Client type.
Room	Room selected from the bed search. This field is not editable.
Comments	Enter comments as needed for the action. An unlimited number of characters is allowed.
Admission Type	Whether the admission is Crisis or Non Crisis. This field is not editable.
Admission Source	Source of the admission. This field is not editable.
Assignment Type	The Assignment Type. Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Reason for the admission.
Location	Location of the facility.
Billing Procedure	Procedure code to use for billing for the services.
Clinician	Client's clinician.
Physician	Client's physician.
Return from Leave check box	Select this check box when the client has returned from leave.
From area	
Program	Program the client is being set on leave from.
Unit	Unit the client is being set on leave from.
Room	Room the client is being set on leave from.
Bed	Bed the client is being set on leave from
Start Date/Time	Date and time the client was admitted.

Census Management - Return From Leave Screen Field Definitions

Census Management - Return From Leave Save and Close

Activity

Brown, Nicol...
 DOB: 12/25/1970
 Gender: Female
 Initial Admit Date/Time: 11/04/2016 12:00 AM

Action: Return From Leave
 Return Date: 11/13/2019
 Time: 12:25 PM
 Firm
 Non-Billable
 Hold Bed

Program: Residential Region 1
 Overflow

Bed: R1H1 Bed 2 (Adult)

 Only show beds for selected program

Unit: Skills R1 House 1
 Client Type: Adult

Room: R1 House 1 Room 2
 Comments:

Admission Type: Non-Crisis
 Admission Source:

Assignment Type:
 Reason:

Location: 54 Oak Dr.
 Billing Procedure: Residential


Clinician:
 Physician:

From

Program: Residential Region 1
 Unit: Skills R1 House 1
 Room: R1 House 1 Room 2
 Bed: R1H1 Bed 2
 Start Date/Time: 04/26/2018 12:00 AM


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 area	
<input type="text"/>	The Client Search button is grayed out (displayed as a gray box) on this screen because you cannot change a client that is associated with a bed at this point in the process.
Client ID	Client's ID from the client's registration information.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Initial Admit Date/Time	Date and time of the client's initial admission.
Action	Action you are taking for the client. It should display "Return From Leave" for this procedure.
Return Date and Time	Date the client returns from leave. Defaults to the current day's date and time. You cannot set a date in the past or the future.
Firm check box	This check box is disabled.
Non-Billable check box	Select this check box to identify that the admission is non-billable.
Hold Bed check box	Select this check box to indicate that you want to hold the selected bed for this action on the client's visit.

Field	Description
Program	Program the client is being returned to. Click the drop-down arrow to change the program.
Overflow	This check box is disabled.
Bed*	Bed the client is returning to. Click the drop-down arrow to change the bed selection.
 Bed Search button	Click this button to search for a bed. Refer to Search for a Bed for more information.
Only show beds for selected program	Select this check box to ensure that only beds available for this program are displayed.
Unit	Unit in which the client is admitted.
Client Type	Client's type.
Room	Room selected from the bed search.
Comments	Enter comments as needed for the return from leave. An unlimited number of characters is allowed.
Admission Type	Whether the admission type was Crisis or Non Crisis. This field is disabled.
Admission Source	Source of the admission. This field is disabled.
Assignment Type	The Assignment Type. Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Reason for the admission.
Location	Location of the facility.
Billing Procedure	Procedure code to use for billing for the services.
Clinician	Client's clinician.
Physician	Client's physician.
From area	
Program	Program to which the client is returning to after leave.
Unit	Unit to which the client is returning to after leave.
Room	Room to which the client is returning to after leave.
Bed	Bed to which the client is returning to after leave.
Start Date/Time	Date and time the client was admitted.

Census Management - Schedule Admission Screen 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 open the Client Search window.
Client ID	Client's ID from the client's registration information.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Initial Admit Date/Time	Client's first admission date and time, if there is one.
Action	Action you are taking for the client. For this procedure, it should display "Schedule Admission".
Scheduled Date	Select the date you expect to admit the client. Defaults to the current day's date.
Time	The current time. Enter a new time if desired. Include AM or PM.
Firm check box	This check box is disabled.
Non-Billable check box	Select this check box to identify the admission is non-billable.
Hold Bed check box	This check box is disabled.
Program	Program the client is enrolled in.
Overflow check box	This check box is disabled.
Bed	Bed you selected from the Bed Census list page for this admission.

Field	Description
 Information icon	Hover over the icon to display the following information: Current Bed Status Expected Discharge Date/Time Clients in Room Gender/Sex of Client in Bed Firm If a scheduled discharge is marked as "Firm" (via This check box), it will also display as "Scheduled Discharge C" on this Information Icon pop-up. Current Bed Status = Open or Scheduled Discharge Clients in Room = Displays other clients with a status of Admit or Scheduled Discharge who are currently admitted to a bed in that room. Gender/Sex of Client in Bed = This field is blank if the status of the bed is Open. If there is a client currently admitted to the bed with the status of Scheduled Discharge, the sex of that client is displayed. Firm = This field is either Yes or No based on the selection from the Scheduled Discharge screen.
 Bed Search button	Click this button to search for a different bed. Refer to Search for a Bed for more information.
Only show beds for selected program	Indicates that you want only beds that "belong" to the selected program to be displayed.
Unit	Unit in which the client is being scheduled for admission.
Client Type*	Type of client.
Room	Room selected from the bed search.
Comments	Enter comments as needed for the admission. An unlimited number of characters is allowed.
Admission Type*	Whether the admission is Crisis or Non Crisis.
Admission Source	Source of the admission. Select from the drop-down list.
Assignment Type	The Assignment Type. Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Reason for the admission.
Location	Location of the facility.
Billing Procedure	Procedure code to use for billing for the services.
Clinician	Client's clinician.
Physician	Client's physician.

Census Management - Schedule Bed Change Screen 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 area	
	The Client Search button is grayed out (displayed as a gray box) on this screen because you cannot change a client that is associated with a bed at this point in the process.
Client ID	Client's ID from the client's registration information.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Action	Action you are taking for the client.
Scheduled Date and Time	Select the date and time when you plan to move the client to a different bed.
Firm check box	This check box is disabled.
Non-Billable check box	Select this check box to indicate that the admission is non-billable.
Hold Bed check box	Select this check box to indicate that you want to hold the bed for the client. This check box is disabled.
Program	Program the client is admitted to.
Overflow	This check box is disabled.

Field	Description
Bed	Bed you are moving the client to. Click the drop-down arrow to change the bed selection.
 Bed Search button	Click this button to search for a bed. Refer to Search for a Bed for more information.
Only show beds for selected program	Indicates that when using the Bed Search button, only beds that belong to the selected program are displayed.
Unit	Unit to which the client is admitted.
Client Type	Client type.
Room	Room the client is currently occupying.
Comments	Enter comments as needed for the admission. An unlimited number of characters is allowed.
Admission Type	Admission type selected during admission.
Admission Source	Source of the admission selected when the client was admitted.
Assignment Type	The Assignment Type. Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Reason for the admission. If this information changes with the bed change, select a new option.
Location	Location of the facility. If this information changes with the bed change, select a new option.
Billing Procedure	Procedure code to use for billing for the services. If this information changes with the bed change, select a new option.
Clinician	Client's clinician.
Physician	Client's physician.
From area	
Program	Program the client is currently enrolled in.
Unit	Unit in which the client currently resides.
Room	Room in which the client currently resides.
Bed	Bed in which the client currently resides.
Start Date/Time	Date and time when the client was admitted to the current room.

Census Management - Schedule Discharge Screen Field Definitions

Census Management - Schedule Discharge
Save and Close

Activity

Seaman, Hayd...

DOB: 07/27/2003

Gender: Male

Initial Admit Date/Time: 12/15/2016 12:00 AM

Action: Schedule Discharge
Scheduled Date: 11/12/2019
Time: 12:00 AM
 Firm
 Non-Billable
 Hold Bed

Program: Residential Region 1
 Overflow

Bed: R1H2 Bed 2 (Adult)
Bed Search...
 Only show beds for selected program

Unit: Skills R1 House 2
Client Type: Adult

Room: R1 House 2 Room 2

Admission Type: Non-Crisis
Admission Source:

Assignment Type:
Reason:

Location: Bayside Hospital
Billing Procedure: Residential

Clinician:
Physician:

Comments:

From

Program: Residential Region 1


Unit: Skills R1 House 2

Room: R1 House 2 Room 2

Bed: R1H2 Bed 2

Start Date/Time: 03/13/2018 01:34 PM

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 area	
	The Client Search button is grayed out (displayed as a gray box) on this screen because you cannot change a client that is associated with a bed at this point in the process.
Client ID	Client's ID from the client's registration information. This field is not editable.
Client name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Initial Admit Date/Time	Client's initial admission date and time.
Action	Action you are taking for the client. For this procedure, "Schedule Discharge" should be displayed.
Scheduled Date	Date the client is being discharged. Defaults to today's date. Use the calendar icon to select a new date, if needed.
Time	Time the client is being discharged. Defaults to the current time. You can change the time, if needed.
Firm check box	Select this check box if the discharge date is firm (known). Do not select this check box if the discharge date is tentative.

Field	Description
Non-Billable check box	Select this check box if the activity is non-billable.
Hold Bed check box	This check box is disabled.
Program	Program the client is being discharged from. This field is disabled.
Overflow	This check box is disabled.
Bed	Bed the client is being discharged from. This field is disabled.
Bed Search	This field is disabled.
Only show beds for selected program	This check box is disabled.
Unit	Unit the client is being discharged from.
Client Type	Client type. This field is disabled.
Room	Room the client is currently occupying.
Discharge Type	Select the reason for the discharge.
Comments	Enter comments as needed for the discharge. An unlimited number of characters is allowed.
Admission Type	Whether the admission is Crisis or Non Crisis. This field is disabled.
Admission Source	Source of the admission. This field is disabled.
Assignment Type	The Assignment Type is a customizable set of categories that can be used by each organization as needed. This field is disabled.
Reason	Reason for the discharge.
Location	Location of the facility. This field is disabled.
Billing Procedure	Procedure code to use for billing for the services. This field is disabled.
Clinician	Clinician assigned to the client. This field is disabled.
Physician	Physician assigned to the client. This field is disabled.
From area	
Program	Program the client is being discharged from.
Unit	Unit the client is being discharged from.
Room	Room the client is being discharged from.
Bed	Bed the client is being discharged from.
Start Date/Time	Start Date and Time for the current activity being completed.

Census Management - Schedule On Leave Screen Field Definitions

Census Management - Schedule On Leave

Save and Close
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Activity

Smith, Berve...

DOB: 09/01/2001

Gender: Female

Initial Admit Date/Time: 09/02/2016 01:56 PM

Action: Schedule On Leave Scheduled Date: 11/13/2019 Time: 11:32 AM Firm Non-Billable Hold Bed

Program: Overflow

Bed: Only show beds for selected program

Unit: Bridge ATU Client Type:

Room: Female 1 Comments:

Admission Type: Admission Source:

Assignment Type: Reason:

Location: Billing Procedure:

Clinician: Physician:

Return from Leave

From

Program: Youth Residential


Unit: Bridge ATU

Room: Female 1

Bed: F1 - Bed 1







Start Date/Time: 10/29/2016 06:00 PM

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
	The Client Search button is grayed out (displayed as a gray box) on this screen because you cannot change a client that is associated with a bed at this point in the process.
Client ID	Client's ID from the client's registration information.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Initial Admit Date/Time	Date and time of the client's initial admission.
Action	Action you are taking for the client. It should display "Schedule On Leave" for this procedure.
Scheduled Date and Time	Date the client's leave begins. Defaults to the current day's date and time. Use the calendar icon to select a day in the future. Change the time if desired.
Firm check box	This check box is disabled.
Non-Billable check box	Select this check box to indicate that the admission is non-billable.


Field	Description
Hold Bed check box	Select this check box to indicate that you want to hold the bed for the client.
Program	Program the client is being admitted to. This field is disabled.
Overflow check box	This check box is disabled.
Bed	The bed the client is occupying. This field is disabled.
Bed Search	This field is disabled.
Only show beds for selected program	Select this check box to ensure that only beds available for this program are displayed.
Unit	Unit in which the client is currently admitted.
Client Type	Client type. This field is disabled.
Room	The room selected from the bed search.
Comments	Enter comments as needed for the schedule on leave. An unlimited number of characters is allowed.
Admission Type	Whether the admission is Crisis or Non Crisis. This field is disabled.
Admission Source	Source of the admission. This field is disabled.
Assignment Type	The Assignment Type. Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Reason for the leave.
Location	Location of the facility.
Billing Procedure	Procedure code to use for billing for the services.
Clinician	Client's clinician.
Physician	Client's physician.
Return from Leave check box	Select this check box when the client has returned from leave.
From	
Program	Program the client is being set on leave from.
Unit	Unit the client is being set on leave from.
Room	Room the client is being set on leave from.
Bed	Bed the client is being set on leave from
Start Date/Time	Date and time the client was admitted.

Census Management - Schedule Return From Leave Field Definitions

Census Management - Schedule Return From Leave
Save and Close      

Activity

 1578270 [Brown, Nicol...](#) DOB: 12/25/1970 Gender: Female Initial Admit Date/Time: 11/04/2016 12:00 AM

Action: Schedule Return From... Scheduled Date:  Time: Firm Non-Billable Hold Bed

Program: Overflow

Bed: Only show beds for selected program

Unit: Skills R1 House 1 Client Type:

Room: R1 House 1 Room 2 Comments:

Admission Type: Admission Source:

Assignment Type: Reason:

Location: Billing Procedure:

Clinician: Physician:

From

Program: Residential Region 1


Unit: Skills R1 House 1


Room: R1 House 1 Room 2

Bed: R1H1 Bed 2

Start Date/Time: 04/26/2018 12:00 AM

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 area	
	The Client Search button is grayed out (displayed as a gray box) on this screen because you cannot change a client that is associated with a bed at this point in the process.
Client ID	Client's ID from the client's registration information. This field cannot be edited.
Client name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Initial Admit Date/Time	Client's initial admission date and time.
Action	Action you are taking for the client. For this procedure, "Schedule Return From ..." should be displayed.
Scheduled Date	Date the client is being schedule to return from leave. Defaults to today's date. Use the calendar icon to select a new date, if needed.
Time	Time the client is being schedule to return from leave. Defaults to the current time. You can change the time, if needed.
Firm check box	This check box is disabled.

Field	Description
Non-Billable check box	Select this check box if the activity is non-billable.
Hold Bed check box	This check box is disabled.
Program	Select the program the client will be returned to.
Overflow	This check box is disabled.
Bed	Select the bed the client will be returned to.
 Bed Search button	Click this button to change the client's bed for when they return from leave. Refer to Search for a Bed for more information.
Only show beds for selected program check box	Select this check box to view only beds for the selected Return Program when you search for a bed.
Unit	Unit the client is being returned to.
Client Type	Client type. This field is not editable.
Room	Room the client is being returned to.
Comments	Enter comments as needed for the return. An unlimited number of characters is allowed.
Admission Type	Whether the admission is Crisis or Non Crisis. This field is not editable.
Admission Source	Source of the admission. This field is not editable.
Assignment Type	The Assignment Type is a customizable set of categories that can be used by each organization as needed.
Reason	Select the reason for the return.
Location	Select the location of the facility.
Billing Procedure	Select the procedure code to use for billing for the services.
Clinician	Select the clinician assigned to the client.
Physician	Select the physician assigned to the client.
From area	
Program	Program the client is being returned to.
Unit	Unit the client is being returned to.
Room	Room the client is being returned to.
Bed	Bed the client is being returned to.
Start Date/Time	Start Date and Time for the current activity being completed.

Census Management - Schedule Return From Leave Return Area 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	Action you are taking for the client. It should display "Schedule return from leave" for this procedure.
Scheduled Return Time	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	Program the client is currently admitted to. Use the drop-down arrow to change if needed.
Overflow	This check box is disabled.
Return Bed	Client's currently occupied bed. Change if needed.
Bed Search... Bed Search button	Click this button to change the client's bed for when they return from leave. Refer to Search for a Bed for more information.
Only show beds for selected program check box	Select this check box to view only beds for the selected Return Program when you search for a bed.
Return Unit	Unit to which the client will return from leave.
Return Room	Room to which the client will return from leave.
Assignment Type	The Assignment Type. Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Reason for the client's stay in the unit.
Comments	Enter comments as needed for this action. An unlimited number of characters is allowed.
Location	Location of the facility.
Billing Procedure	Procedure code used for billing for admission to the bed.

Census Management - Schedule Transfer Screen 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 area	
	The Client Search button is grayed out (displayed as a gray box) on this screen because you cannot change a client that is associated with a bed at this point in the process.
Client ID	Client's ID from the client's registration information. This field cannot be edited.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Initial Admit Date/Time	Client's initial admission date and time.
Action	Action you are taking for the client. For this procedure, "Schedule Transfer" should be displayed.
Scheduled Date	Date the client is being scheduled to transfer. Defaults to today's date. Use the calendar icon to select a new date, if needed.
Time	Time the client is being scheduled to transfer. Defaults to the current time. You can change the time, if needed.
Firm check box	This check box is disabled.

Field	Description
Non-Billable check box	Select this check box if the activity is non-billable.
Hold Bed check box	This check box is disabled.
Program	Select the program.
Overflow	This check box is disabled.
Bed	Select the bed.
 Bed Search button	Click this button to search for a bed. Refer to Search for a Bed for more information.
Only show beds for selected program check box	Select this check box to view only beds for the selected Return Program when you search for a bed.
Unit	Unit the client is currently in.
Client Type	Client type. This field is not editable.
Room	Room the client is currently in.
Comments	Enter comments as needed for the transfer. An unlimited number of characters is allowed.
Admission Type	Whether the admission is Crisis or Non Crisis. This field is not editable.
Admission Source	Source of the admission. This field is not editable.
Assignment Type	The Assignment Type is a customizable set of categories that can be used by each organization as needed.
Reason*	Select the reason for the transfer.
Location	Select the location of the facility.
Billing Procedure	Select the procedure code to use for billing for the services.
Clinician	Select the clinician assigned to the client.
Physician	Select the physician assigned to the client.
From area	
Program	Program the client is currently in.
Unit	Unit the client is currently in.
Room	Room the client is currently in.
Bed	Bed the client is currently in.
Start Date/Time	Start Date and Time for the current activity being completed.

Census Management - Swing Bed Screen Field Definitions

Census Management – Swing Bed

Save and Close
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Activity

Action: Swing Bed

Start Date: 📅 Time: End Date: 📅 Time:

Program:

Bed: 1101-B Leave Procedure:

Unit: Adult Inpatient Procedure:

Room: 1101 Location:

From

Bed: 1101-B Program: Youth Residential

Unit: Adult Inpatient Procedure: Residential Day

Room: 1101


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

Census Management - Transfer Screen 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 area	
	The Client Search button is grayed out (displayed as a gray box) on this screen because you cannot change a client that is associated with a bed at this point in the process.
Client ID	Client's ID from the client's registration information.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
DOB	Client's date of birth.
Gender	Client's gender.
Initial Admit Date/Time	Client's initial admit date and time for this visit.
Action	Action you are taking for the client. For this procedure, the Action should be Transfer.
Transfer Date	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*	Program the client is being transferred to. Click the drop-down arrow to change the program.
Overflow	This check box is disabled.
Bed	Bed the client is being transferred to. Click the drop-down arrow to change the bed selection.

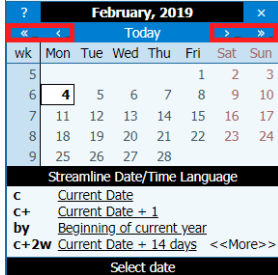
Field	Description
 Bed Search button	Click this button to find an open bed.
Only show beds for selected program	Whether you want only beds available for the selected program to be displayed when you complete a bed search.
Unit	Unit where the client is being transferred.
Client Type*	Client type. This field is not editable.
Room	Room selected from the bed search.
Comments	Enter comments as needed for the admission. An unlimited number of characters is allowed.
Admission Type	Displays whether the admission was Crisis or Non Crisis.
Admission Source	Source of the admission.
Assignment Type	The Assignment Type. Assignment type is a customizable set of categories that can be used by each organization as needed.
Reason	Reason for the transfer.
Location	Location of the facility.
Billing Procedure	Procedure code to use for billing for the bed service.
From area	
Program	Program the client was transferred from.
Unit	Unit the client was transferred from.
Room	Room the client was transferred from.
Bed	Bed the client was transferred from.
Start Date/Time	Date and time of the transfer.

Census Summary List Page Field Definitions

Census Summary (6)											
Supervision Hierarchy		Unit		All Units		Program		Youth Residential		Apply Filter	
Date Range		Custom		From Date		11/11/2019		To Date		11/12/2019	
			Monday, November 11, 2019				(Today) Tuesday, November 12, 2019				
<input checked="" type="radio"/> Unit View <input type="radio"/> Program View		Bed Cap.	Census	D/C's	Adm's	Avail	Bed Cap.	Census	D/C's	Adm's	Avail
Adult Inpatient		5	2			3	5	2			3
Bridge		2	1		1	1	2	1		1	1
Bridge ATU		3	1			1	3	1			1
Kingsboro ATC		5				5	5				5
Pheasant Hollow		19	3			14	19	3			14
Stutzman ATC		4				4	4				4
Total		38	7		1	28	38	7		1	28

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
Supervision Hierarchy button	Click this button to display the Select Supervision Hierarchy pop-up window. Click the applicable check box(es) and click the Save button. If you click the top level Organization check box, all Divisions and Programs are selected. Hover the cursor over the field next to the button and the hierarchy(ies) that you selected are displayed. Refer to the <i>Supervision Hierarchy User Guide</i> for more information.
Unit*	Select the applicable unit.
Program*	Select the applicable program.
Apply Filter button	Click this button to apply the filter settings and display the results.
Left and Right Arrow buttons	If you specify a date range that exceeds 4 days, the first four days of data is displayed and these buttons are enabled. Click the buttons to display data forward and backward in the date range.
Date Range*	Select the applicable date range. To see data for a value other than Today or 4 Days, select Custom and then enter the From Date and To Date. If you select Today or 4 Days, the From and To Date fields are automatically populated.

Field	Description
From Date*	<p>First date to display data for. Enter the date in the mm/dd/yyyy format or click the calendar icon to navigate through the calendar and select the date. Clicking the double caret (<< or >>) in the calendar navigates you backward or forward by one year. Clicking the single caret (< or >) navigates you backward or forward by one month. See areas outlined in red below. For pre-set dates, click the applicable hyperlink in the Streamline Date/Time Language section at the bottom of the pop-up calendar.</p> 
To Date*	<p>Last date to display data for. Enter the date in the mm/dd/yyyy format or use the calendar icon to select the date.</p>
Unit View radio button	<p>Select this radio button to display data for units.</p>
Program View radio button	<p>Select this radio button to display data for programs.</p>
Unit or Program	<p>Click the hyperlinked name of the unit or program to go to the Bedboard list page which is already filtered for the specified unit or program.</p>
Bed Cap.	<p>The total number of beds associated with the unit or program. Click the hyperlinked number to go to the Bedboard list page which is already filtered for the specified unit or program.</p>
Census	<p>The number of clients who have one of the current below statuses in beds associated to this unit or program:</p> <ul style="list-style-type: none"> • Admit • Occupied • Scheduled Discharge for this date • Scheduled Admission prior to the date in this column (client is scheduled for admission on 4/26, this bed should not reflect this status for this client on 4/26, but should include this status for client on 4/27 and future dates if both dates are visible on the list page) <p>Click the hyperlinked number to go to the Bedboard list page which is already filtered for the criteria.</p>
D/C's	<p>The number of clients who have the status of "Scheduled Discharge" in beds associated to this unit or program for the given date. Click the hyperlinked number to go to the Bedboard list page which is already filtered for the criteria "Unit", "Date", "Program" and the status of "Occupied" and "Scheduled Discharge".</p>

Field	Description
Adm's	<p>The number of clients who have the status of "Scheduled Admission" in beds associated to this unit or program for the given date.</p> <p>Click the hyperlinked number to go to the Bedboard list page which is already filtered for the criteria "Unit", "Date", "Program" and the status of "Scheduled Admission".</p>
Avail	<p>The calculated number of beds available based on the Total Number of beds that are listed with a status of Scheduled Discharge for this date and/or remain in an Open status.</p> <p>Click the hyperlinked number to go to the Bedboard list page. All beds with a status of Open are listed.</p> <p>Click the Calendar icon next to the hyperlinked number and the Census Management - Schedule Admission screen for the selected client is displayed. Refer to Census Management - Schedule Admission Screen Field Definitions for information about each field. Refer to Schedule Admission for information about scheduling an admission.</p>

Inpatient Activity Details Screen Activity Details Tab Field Definitions

The screenshot shows the 'Inpatient Activity Details' screen with the following fields and values:

- Client ID:** 1666220
- Client Name:** Seaman, Hayden
- Start Date and Time:** 03/13/2018 1:34 PM
- Status:** Occupied
- Disposition:** (empty)
- End Date and Time:** (empty)
- Action:** (empty dropdown)
- Arrival Date and Time:** (empty)
- Program:** Residential Region 1
- Bed:** R1H2 Bed 2
- Unit:** Skills R1 House 2
- Room:** R1 House 2 Room 2
- Assignment Type:** (empty dropdown)
- Reason:** (empty dropdown)
- Location:** Bayside Hos (empty dropdown)
- Billing Procedure:** Residential
- Clinician:** (empty dropdown)
- Physician:** (empty dropdown)
- Checkboxes:** Overflow (disabled), Firm (disabled), Hold Bed (checked), Non-Billable (checked)
- Comments:** (empty text area)

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
	This button is disabled.
Client ID	Client's ID number assigned when the client was registered. This field is not editable.
Client's Name	Client's last name, first name.
Start Date and Time*	Date and time of the scheduled admission.
Status	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 and Time	End date and time for the current action.
Action	Action you are taking on this client's visit. Click the drop-down arrow to choose the action.
Arrival Date and Time	Date and time the client arrived for the action shown in the Status field.
Program	Program the client is enrolled in.
Overflow check box	This check box is disabled.
Firm check box	This check box is disabled.
Hold Bed check box	Indicates that you want to hold the selected bed for this action on the client's visit.
Bed	Bed the client is occupying.
Bed Search button	Click this 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" check box.

Field	Description
Only show beds for selected program	Whether or not you want to only view the beds that are valid for the selected program.
Non-billable	The action is non-billable. This means no service will be created and billed for this action.
Unit	Unit where the bed is located.
Room	Room where the bed located.
Assignment Type	Select the assignment type for this action.
Reason	Select the reason for the action.
Comments	Enter comments about action. An unlimited number of characters is allowed.
Location*	Select the location of the bed.
Billing Procedure*	Select the billing procedure that identifies this action.
Clinician	Select the client's clinician.
Physician	Select the client's physician.

Inpatient Activity Details Screen Visit Tab Field Definitions

The screenshot shows the 'Inpatient Activity Details' window with the 'Visit' tab selected. The 'Visit Information' section contains various input fields for patient and visit data, including Visit ID (392), Client ID (166622), Client Name (Seaman, Hayden), Requested Date, Scheduled Date, Status (Admitted), Admit Date (12/15/2016), Admit Time (12:00 AM), Discharged Date, Discharge Time, and a 'Modify...' button. Other fields include Emergency Room Arrival/Departure dates and times, Client Type (Adult), DRG Code, Admit Decision Date/Time, Discharge Type, Admission Type (Non-Crisis), Admission Source, Bed Billing Procedure (Residential), and Leave Billing Procedure (Leave). The 'Activity' section below shows a table of visit activities with columns for Start Date, End Date, Status, Disposition, Bed, Program, and Comment.

Start Date	End Date	Status	Disposition	Bed	Program	Comment
12/15/2016 12:00 AM	10/11/2017 04:40 PM	Occupied	Went On Leave	R1H2 Bed 2-R...	Residential R...	
10/11/2017 04:40 PM	03/13/2018 01:34 PM	On Leave	Returned From Leave	R1H2 Bed 2-R...	Residential R...	
03/13/2018 01:34 PM	11/13/2019 10:00 AM	Occupied		R1H2 Bed 2-R...	Residential R...	

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 area	
Visit Id	Unique ID number assigned when the client was admitted for this visit.
Client	Client's ID.
Client Name	Client's name is displayed last name and first name. Click the hyperlinked name to display the Client Summary.
Requested Date	Date the admission was requested.
Scheduled Date	Date the admission was scheduled.
Status	Current status of the client.
Admit Date	Date the client was admitted for this visit.
Admit Time	Time the client was admitted for this visit.
Discharged Date	Date the client was discharged from the visit.
Discharge Time	Time the client was discharged from the visit.
Modify button	Click the Modify button to edit grayed out fields in the Visit Information section. Refer to Modify Visit Information for more information.
Emergency Room Arrival Date	Date the client arrived at the emergency room prior to this visit.
Emergency Room Arrival Time	Time the client arrived at the emergency room prior to this visit.
Client Type	Whether the client is Adult, Adolescent, or Child.
Emergency Room Departure Date	Date the client left the emergency room.
Emergency Room Departure Time	Time the client left the emergency room.
DRG Code	Related Group (DRG) code used to classify the services group.

Field	Description
Admit Decision Date	Date the decision was made to admit the client.
Admit Decision Time	Time the decision was made to admit the client.
Discharge Type	Reason for the discharge.
Admission Type	Whether the admission is Crisis or Non-Crisis.
Admission Source	Referral source for the admission.
Activity area	
Start Date	Beginning date for an action on this client's visit.
End Date	End date for an action on this client's visit.
Status	Status that defines the action taken on this client's visit.
Disposition	Status was changed. A new record line is displayed in the Activity section.
Bed	Bed the client was occupying when the action was initiated,
Program	Program the client is enrolled in for this action.
Comment	Any comments entered for this action for this client.

Inpatient Activity Details Screen 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	Date the client arrived at the emergency room prior to this visit.
Emergency Room Arrival Time	Time the client arrived at the emergency room prior to this visit.
Emergency Room Departure Date	Date the client left the emergency room.
Emergency Room Departure Time	Time the client left the emergency room.
Admit Decision Date	Date the decision was made to admit the client.
Admit Decision Time	Time the decision was made to admit the client.
Client Type	Whether the client is Adult, Adolescent or Child.
DRG Code	Diagnosis Related Group (DRG) code used to classify the services group.
Admission Type	Whether the admission is Crisis or Non-Crisis.
Admission Source	Referral source for the admission.

Field	Description
Bed Billing Procedure	Billing procedure for the specified bed.
Leave Billing Procedure	Billing procedure.

Swap Bed 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
Bed1	
Bed	The first client who wants to swap beds.
Client	The first client's name and client ID.
Unit	Unit where the occupied bed is located.
Room	Room where the occupied bed is located.
Bed2	
Date Time	The current day's date is displayed and cannot be changed. The current day's time is displayed and can be changed. Enter the time for the swap.
Bed2*	Type the bed number that is being swapped. The information is displayed in a drop-down of the field. Select the item in the drop-down, if it is the desired bed. If you select a bed and need to change it, click the eraser icon () to clear all the fields in the Bed2 section.
Client	Current occupant of the bed selected in the <i>Bed2</i> field.
Unit	Unit where the selected bed is located.
Room	Room where the selected bed is located.

Why Can't I Access This Screen?

You can only access screens/items that your user login has been granted access to. This is referred to as Permissions. Use the table below to find the screen/item you need access to and determine the Permission Types that are needed.

If you need additional Permission Types and you cannot access the Administration tab, contact your system administrator to have your Permissions changed.

If you have access to the Administration tab, follow the steps below to change Permissions:

1. Follow this path: **Administration** tab > **User/Role Setup** banner > **Role Definition** sub-banner.
The Role Definition screen is displayed. Refer to [Role Definition Screen Field Definitions](#) for information about each field.
2. In the Roles area, click the **radio button** next to the applicable role.
3. In the Default Permissions for Selected Role area, make the applicable selections in the drop-down fields and click the **Apply Filter** button.
The list of Permission Items and their status is displayed.
4. You can:
 - change Permissions for individual items by clicking the Deny or Grant button for each Permission Item, or
 - turn all Permissions on for all Items by clicking the Grant All button, or
 - turn all Permissions off by clicking the Deny All button.
5. Click the **Save** button in the tool bar when you are finished changing Permissions.
6. Click the **Exit** icon (✖) in the tool bar to return to the previous screen/page.

Permissions Needed


You Need Permission Type	Parent	Permission Item
Banners	Administration	Units/Rooms/Beds
Banners	Client	Client Summary
Banners	My Office	Bedboard
Banners	My Office	Census Summary
Banners	My Office	Inpatient/Residential
Screens	Administration	Bed Details
Screens	Administration	Room Details
Screens	Administration	Unit Details
Screens	Client	Client Search
Screens	My Office	Admit
Screens	My Office	Bed Census
Screens	My Office	Bed Change
Screens	My Office	Census Management
Banners	My Office	Census Management – Swing Bed
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 On Leave
Screens	My Office	Schedule Return From Leave
Screens	My Office	Schedule Transfer

Role Definition Screen Field Definitions

The screenshot shows the 'Role Definition' interface. It includes a 'Roles' list with radio buttons for roles like 'Admin/Reception/Intake', 'Administrator', 'Behavior Technician', etc. There are buttons for 'Export Staff Roles' and 'Add Role...'. A 'Permission Utilities' section offers actions like 'Copy permissions from one role to selected role...', 'Remove permissions from selected role...', and 'Grant complete access to selected role...'. At the bottom, there's a 'Default Permissions for Selected Role' section with dropdowns for 'Select Permission Type...', 'Select Parent...', and 'All', along with a 'Permission Item' field and 'Grant All'/'Deny All' buttons.

Your system may have been customized to require additional fields.

Field	Description	Required
Roles area		
Roles	All Roles defined in the system. A Role defines a collection of permissions to make it easier to assign permissions 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.	Yes
Export Staff Roles button	Click this button to export a list of all Roles defined in the system along with the names of the staff that are assigned to each Role.	----
Add Role button	Click this button to add a new Role to the system and assign permissions to the Role.	----
Default Permissions for Selected Role area		
	Click this box to maximize (or minimize) the number of entries that display in the list area of this section.	----
Select Permission Type	Select a Permission Type to view or modify for the selected Role.	Yes

Field	Description	Required
Select Parent	Select a Parent Type to view or modify for the selected Role.	No
All	Select the current Permission Types to view.	No
Permission Item text box	If a specific Permission Type is selected, you can enter the name or portion of the name of the Permission Item in this text box and click the Apply Filter button to display the Permission Item. This text box is not enabled if a specific Permission Type has not been selected.	----
 <eraser icon>	Click this icon to delete the text entered in the Permission Item text box.	----
Apply Filter button	Click this button to apply the filter settings and display the results.	----
Grant All button	Click this button to grant permissions on all Permission Items in the Permission Utilities section.	----
Deny All button	Click this button to deny permissions on all Permission Items in the Permission Utilities section.	----
Permission Utilities area		
Selected Role	This field displays if you have selected a Role in the Roles area.	----
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 permissions are copied from the Role you select in the Copy Permission from... drop-down list. However, if there are permissions already set up on the Selected Role, these permissions are not overridden.	----
Remove permissions from selected role...	Click the hyperlink to remove all permissions from the selected Role.	----
Grant complete access to the selected role...	Click the hyperlink to grant all permissions in the system to the selected Role.	----