# Bedboard User Guide

**Version 2**

**November 2019**

# Table of Contents

# 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?](#)



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 | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ⊙ Unit View ○ 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?



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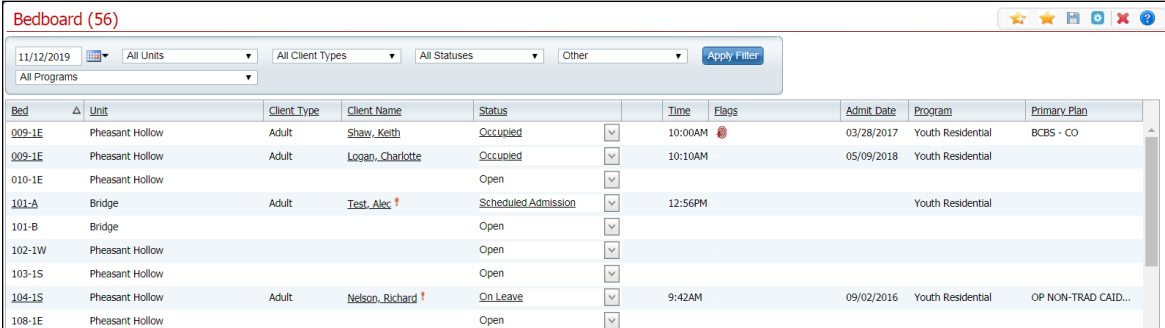
The client must be entered in the system and enrolled in a program before they can be scheduled for admission to a bed.

## 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?



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?

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

   The Census Management - Schedule Admission screen is displayed.



6. 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.

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

## Change 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?



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

3. 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?



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

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



5. Make changes to any fields on the screen. 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.

# 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?](#)



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

   for information about each field.



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?



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?

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?](#)



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.

8. 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.

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

# Change an Admission of 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?



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

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

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

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

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.
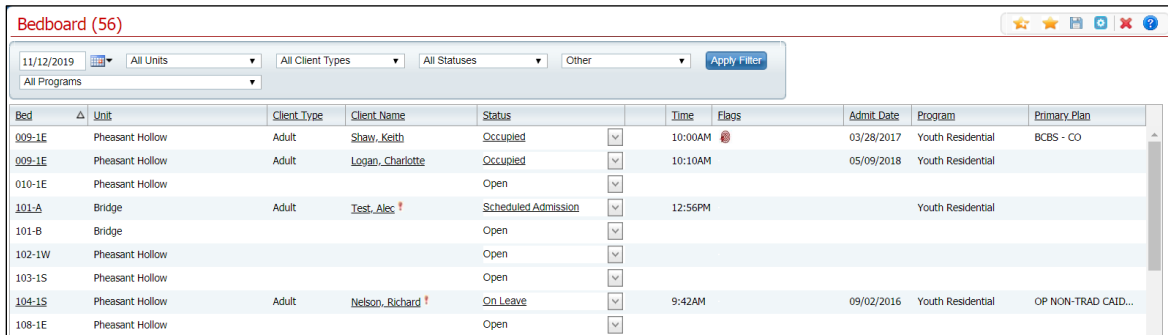
## Delete an Admission

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?](#)



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.
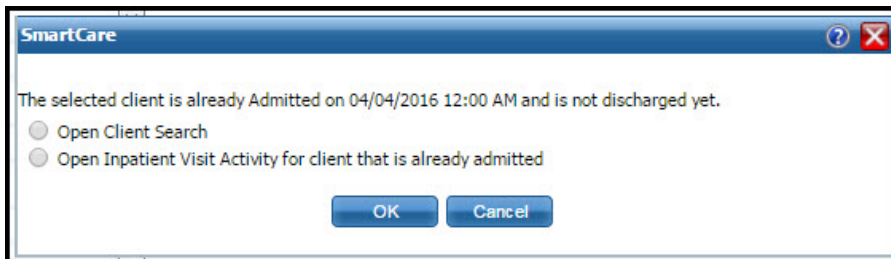


2. Look in the menu tabs above the screen to determine which client's account is open. Notice the red box outlining the client's tab in the figure below.

3. 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

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?



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

3. Find the **client** on the Bedboard list page.

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

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

The Census Management - Schedule Bed Change screen is displayed.

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?

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 screen is displayed with the Activity Details tab active.



5.  Verify the correct client information is displayed.

6.  Complete the changes you want to make on the Activity section 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:

  o [Bed Change](#)

  o [Schedule Transfer](#)

  o [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?



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.



5. Verify the correct client information is displayed.

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

   The Confirmation Message window is displayed.

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

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

8. 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
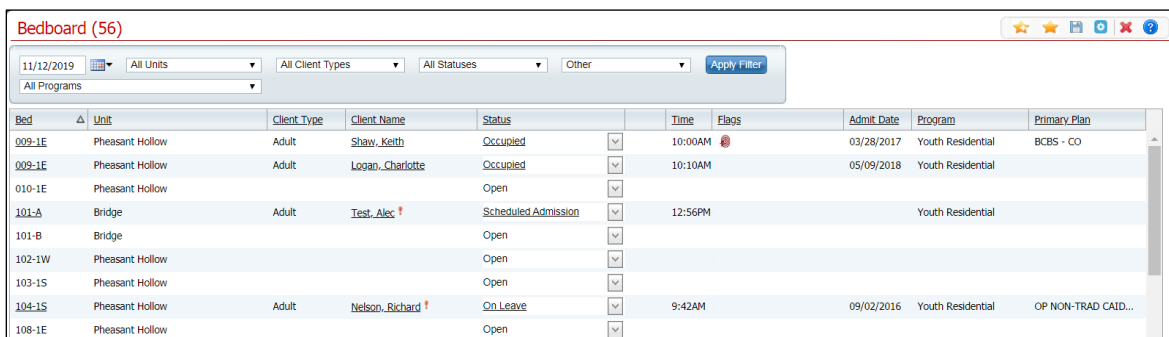
## Change a Bed Assignment

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

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?



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

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

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

   The Census Management - Bed Change screen is displayed.

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?

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.



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.

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.



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?



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.



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.
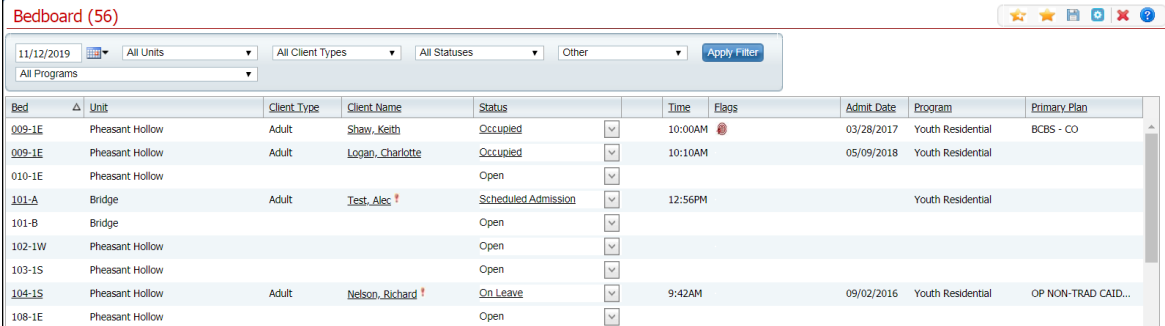
# Unblock a Bed

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?



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

   A Confirmation Message pop-up is displayed.
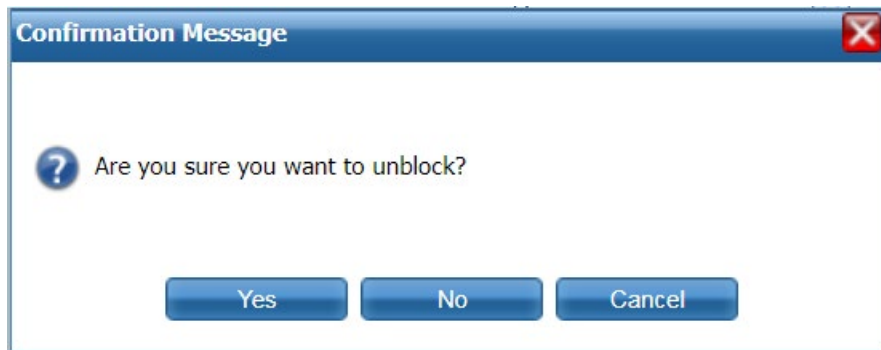


3. Click the **Yes** button and the Status of the bed changes to Open.

# 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:
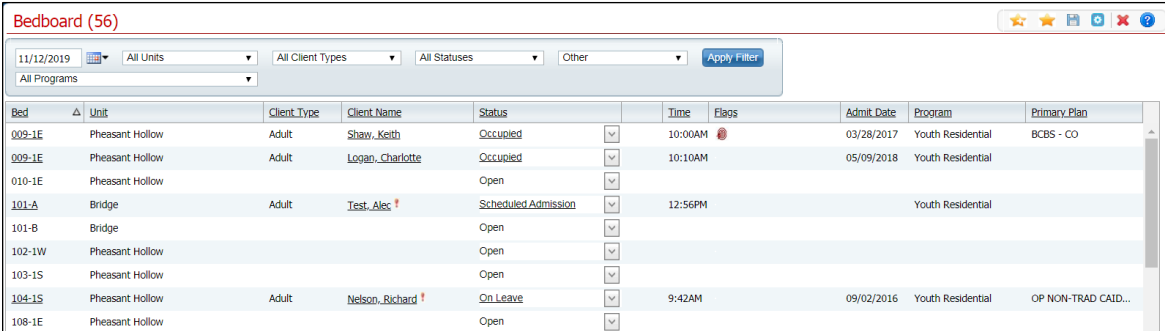
- Schedule a Discharge
- Change a Scheduled Discharge
- Delete a Scheduled Discharge

## 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?



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.

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?

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.



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.



   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.
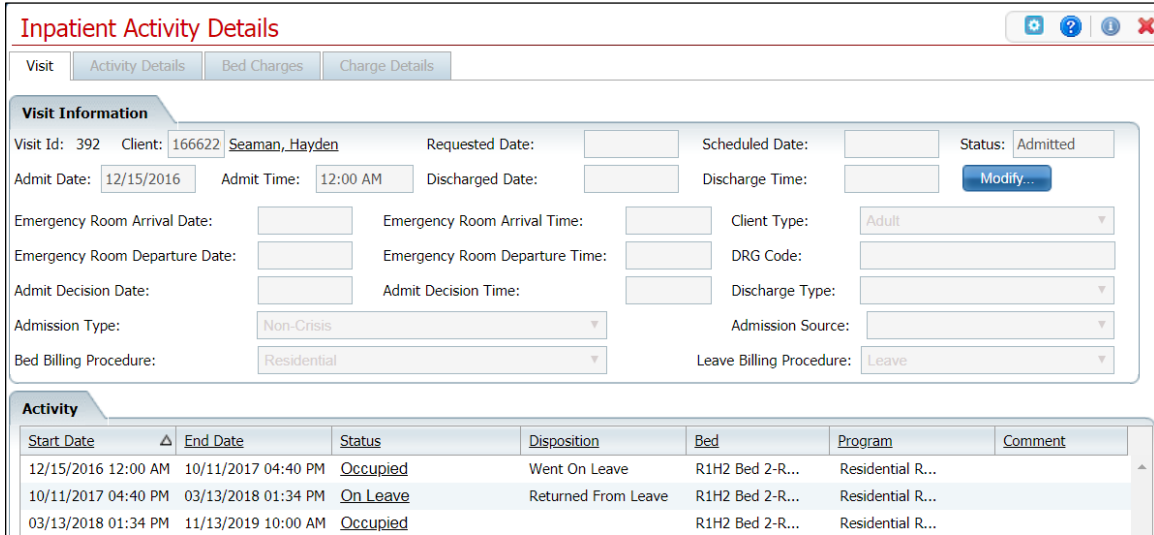
   Why Can't I Access This Screen?



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.



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.

7. 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.



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

   The Confirmation Message window is displayed.

9. Click the **Yes** button.

10. 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

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?

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

3. Find the **client** you want to discharge.

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

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

   The Census Management - Discharge screen is displayed.



5. 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**.

6. 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

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?



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

3. Find the **client** whose discharge you need to change.

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

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



   Notice that the Disposition is set to Discharged.

5. 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.

6. 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.

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?

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

3. Find the **client** whose discharge you want to delete.

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

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



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

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

   The Confirmation Message window is displayed.

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

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

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



9. 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?



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.

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?

   

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.

   

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.
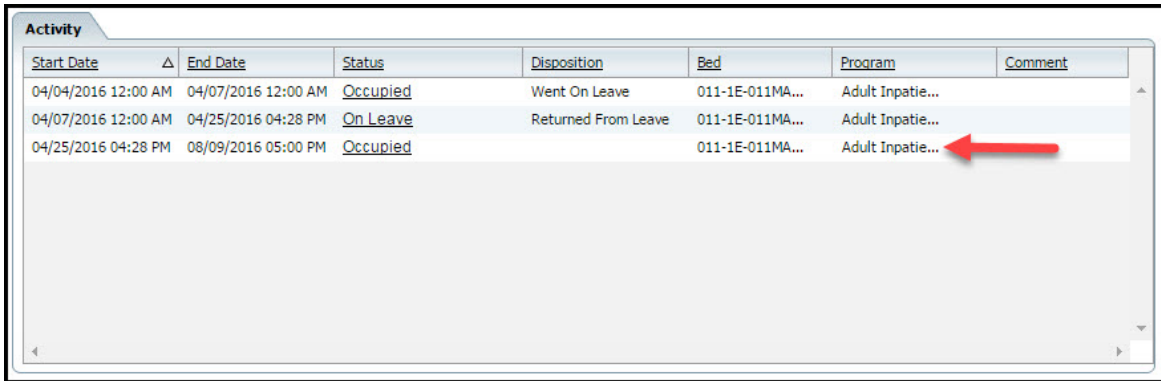
   Why Can't I Access This Screen?



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.

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.



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?](#)



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.

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.



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?



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.



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

   - Change the Start Date

   - Change or add one of the following Actions:

- o On Leave - The Census Management - On Leave screen is displayed. Start with step 5.
- o 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.
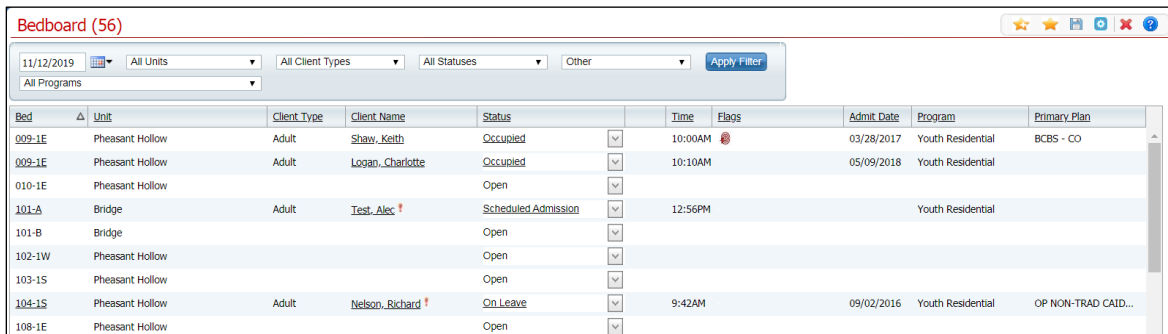
## Delete a Client's Scheduled On Leave Setting

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?



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?](#)



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.

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:

    o  Return from Leave

    o  Schedule Return from Leave

    o  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?



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?

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.  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

  - o Return from Leave

  - o Schedule Bed Change

  - o Schedule Transfer

  - o 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?

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

3.  Find the client who you want to change the scheduled return from leave.

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

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



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

    - Start date

    - Action to one of the following:

        o   Return from Leave - The Census Management - Return From Leave screen is displayed. Start with step 5.

        o   Schedule Bed Change - The Census Management - Schedule Bed Change screen is displayed. Start with step 5.

        o   Schedule Transfer - The Census Management - Schedule Transfer screen is displayed. Start with step 5.

        o   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.

6. 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.

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 | | | | | | |

Bedboard (56)
11/12/2019   All Units   All Client Types   All Statuses   Other   Apply Filter
All Programs

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

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

4. 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.



   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?



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.

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?

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.



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?



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.

5. 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.

6. 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.

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?



2. 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.
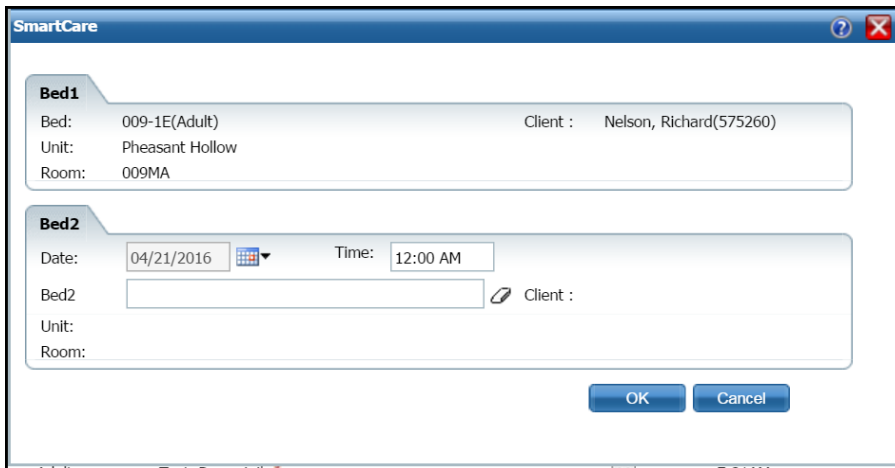


4. Complete the **Bed2** section with the information on the second client who wants to swap beds. Refer to Swap Bed Window Field Definitions for information about each field.

## 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?

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?



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?

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?



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?

2. Filter the list to display the correct Unit, Rooms, Beds and Programs.

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

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

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



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

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

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

7. Complete the remaining fields on the Census Management - Transfer page. Refer to Census Management - Transfer Screen Field Definitions for information about each field.

8. 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?

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 | • Bed Change - use this procedure.<br>• Transfer - use this procedure.<br>• On Leave - use this procedure.<br>• Discharge - use this procedure.<br>• Schedule Bed Change - use this procedure.<br>• Schedule Transfer - use this procedure.<br>• Schedule On Leave - use this procedure.<br>• Schedule Discharge - use this procedure.<br>• Swap Beds - use this procedure.<br>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. |
| On Leave | • Return from Leave - use this procedure.<br>• Schedule Return from Leave - use this procedure.<br>• Discharge - use this procedure. |
| Discharged | No actions are available. |
| Returned From Leave | No actions are available. |
| Scheduled Bed Change | • Bed Change - use this procedure. |
| Scheduled Transfer | • Transfer - use this procedure.<br>• Schedule Bed Change - use this procedure.<br>• Schedule On Leave - use this procedure. |
| Scheduled Discharge | • Discharge - use this procedure.<br>• Bed Change - use this procedure.<br>• Transfer - use this procedure.<br>• On Leave - use this procedure.<br>• Schedule Bed Change - use this procedure.<br>• Schedule Transfer - use this procedure.<br>• Schedule On Leave - use this procedure. |
| Scheduled Discharge C | • Discharge - use this procedure.<br>• Bed Change - use this procedure.<br>• Transfer - use this procedure.<br>• On Leave - use this procedure.<br>• Schedule Bed Change - use this procedure.<br>• Schedule Transfer - use this procedure.<br>• Schedule On Leave - use this procedure. |
| Blocked | • 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?



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?](#)



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.



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

| | |
|---|---|
| Scheduled Discharge C | • 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. |

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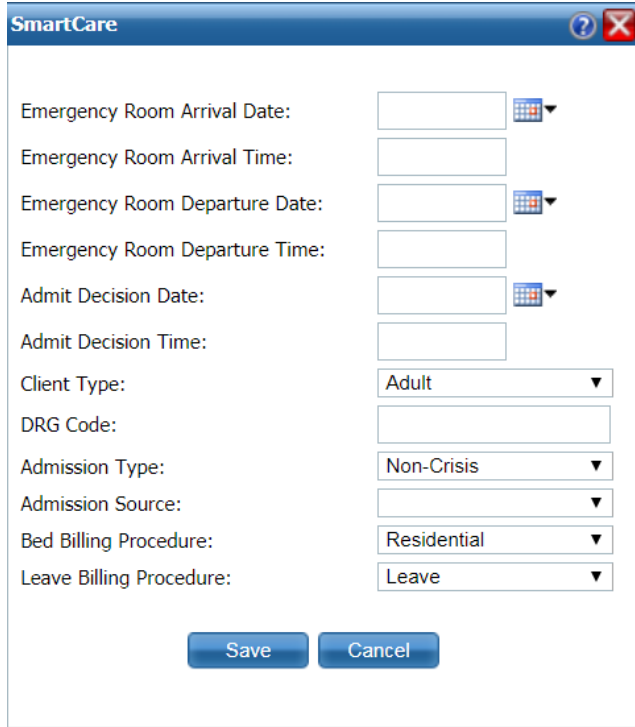
# Modify Visit Information

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.

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.



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



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* | Start date and time to block the bed.<br><br>Enter the date in the mm/dd/yyyy format or click the calendar icon to navigate through the calendar and select the date.<br><br>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.<br><br>For pre-set dates, click the applicable hyperlink in the Streamline Date/Time Language section at the bottom of the pop-up calendar.<br><br><br><br>Enter a time and include AM or PM. |
| End Date* and Time* | End date and time to block the bed.<br><br>Enter the date in the mm/dd/yyyy format or use the calendar icon to select the date.<br><br>Enter a time and include AM or PM. |
| 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



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... <br> 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



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... <br><br> 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



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.<br>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



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...<br><br>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



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.<br>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...** <br><br> 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.<br>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: <br><br> Current Bed Status <br> Expected Discharge Date/Time <br> Clients in Room <br> Gender/Sex of Client in Bed <br> Firm <br><br> 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. <br><br> Current Bed Status = Open or Scheduled Discharge <br><br> Clients in Room = Displays other clients with a status of Admit or Scheduled Discharge who are currently admitted to a bed in that room. <br><br> 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. <br><br> 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.<br>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... <br><br> 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



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.<br>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<br>check box | Select this check box if the discharge date is firm (known).<br>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



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



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...** <br><br>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 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...** <br> 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



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...** <br><br>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. |
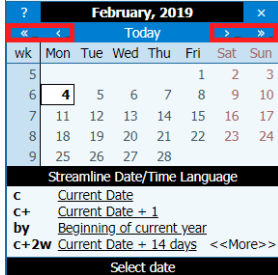
## Census Summary List Page Field Definitions



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 *Supervision Hierarchy User Guide* 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* | First date to display data for.<br><br>Enter the date in the mm/dd/yyyy format or click the calendar icon to navigate through the calendar and select the date.<br><br>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.<br><br>For pre-set dates, click the applicable hyperlink in the Streamline Date/Time Language section at the bottom of the pop-up calendar.<br><br> |
| To Date* | Last date to display data for.<br><br>Enter the date in the mm/dd/yyyy format or use the calendar icon to select the date. |
| Unit View radio button | Select this radio button to display data for units. |
| Program View radio button | Select this radio button to display data for programs. |
| Unit or Program | 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. |
| Bed Cap. | The total number of beds associated with the unit or program.<br><br>Click the hyperlinked number to go to the Bedboard list page which is already filtered for the specified unit or program. |
| Census | The number of clients who have one of the current below statuses in beds associated to this unit or program:<br><br>• Admit<br><br>• Occupied<br><br>• Scheduled Discharge for this date<br><br>• 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)<br><br>Click the hyperlinked number to go to the Bedboard list page which is already filtered for the criteria. |
| D/C's | The number of clients who have the status of "Scheduled Discharge" in beds associated to this unit or program for the given date.<br><br>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". |

| Field | Description |
|---|---|
| Adm's | The number of clients who have the status of "Scheduled Admission" 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 "Scheduled Admission". |
| Avail | 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. |
| | Click the hyperlinked number to go to the Bedboard list page. All beds with a status of Open are listed. |
| | 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. |

## Inpatient Activity Details Screen Activity Details Tab Field Definitions



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

| Field | Description |
|---|---|
| [---] | 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... 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



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. <br> 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 *Bed2* 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



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.<br>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. | ---- |