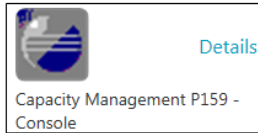# Capacity Management and RTLS

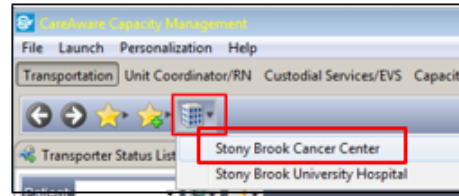Capacity Management and RTLS (Real Time Location Services) will track patients locations within the MART building. Upon arrival, the patient will be 'Assigned' an RTLS device tag that will display their locations on the 5th and 6th floor as they move throughout the various rooms and departments during their appointments. Patient Access Reps will have 3 stations on the 5th floor (for Physician Visits, Hospital Clinic & Lab) and 2 stations on the 6th floor (within the Infusion Unit & Peds).

- **Upon Arrival, Patient Access Rep** will **'Assign'** the RTLS device after arriving the patient for their appointment in EWS.
- **Upon Departure,** the **Check Out Desk Schedulers** will **'Unassign' the device** (Pt Access Rep can 'Unassign if needed.)
- **Ancillary Staff (Social Workers, Nutritionists & Financial staff)** can 'Unassign' the badge if the patient is in their office as their last appointment.
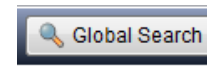
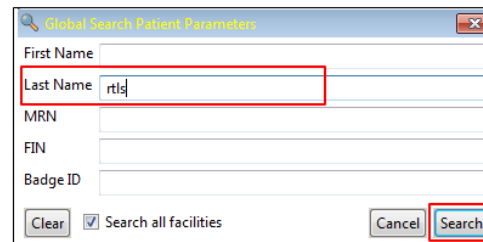1. Patient Access Rep opens the Capacity Management app & clicks '**Dashboard'** button upper toolbar.

2. Click **Hospital building icon** & select **'SB Cancer Center'.** Click arrow, select **MART 5th Floor RTLS** or **MART 6th floor RTL.**
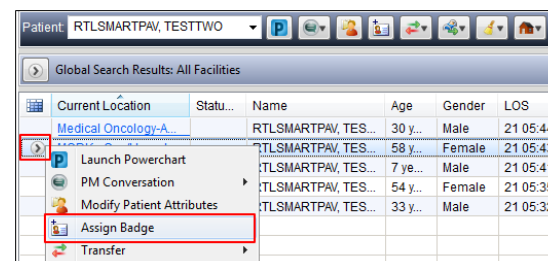
3. Patient List displays, click **Global Search** button lower right pane to search for patient's name.
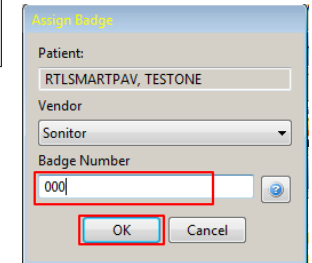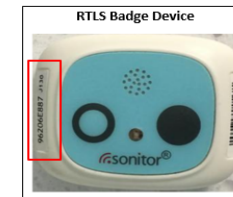
4. Enter **Patient's Last Name** or **MRN,** click **Search.** Name may auto-populate or select from list.

5. Go to the **1st column** to the left of 'Current Location', place the cursor & click **arrow** icon. Select **'Assign Badge'** from drop down.

6. Locate Badge # on the left side of device. In **Badge # box**, **enter the badge's ID numbers** manually or use the scanner, Click **OK.**
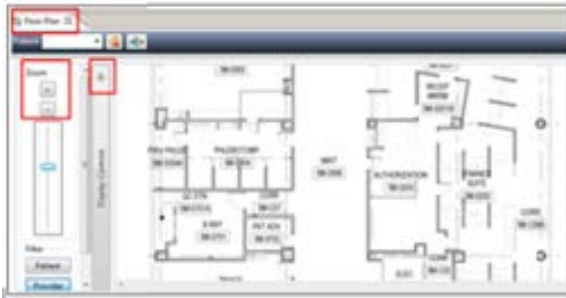
7. Patient will display on the **Floor Plan** with as a **Blue Icon**. Informational functions:
- 'Hover (icon) to discover': Name, badge #, location, provider, LOS, comments
- Single click name on Patient list to see red 'sonar' circles to pinpoint location on map
- **Double click** in the **'RTLS Location' column** in the Patient List to open the **Location History** window for that shows patient's movement for that day, ie, Waiting room, Lab, Radiology, etc
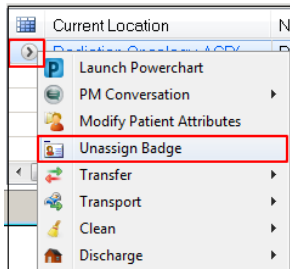- Comment column: free-text pertinent info

8. **Floor Plan:** Display/Controls to ↑ or↓zoom and filter for patient or equipment.

9. At the end of the patient's visit, the patient will go to the **Front/Check-Out Desk** for the **Depart Visit Summary**, any printed Reqs, and to return the badge. Clerk will go to Patient list, locate name, click **arrow** before it & select **'Unassign Badge'** from the dropdown & click **'Yes'** to the pop-up.

NOTE: If the patient has additional appts with **Ancillary** depts, ie, Social Work, Nutritionist, & Finance, those staff will be responsible to **'Unassign'** the badge & collect it.

10. If the patient leaves with the device, it will display near the exit door, after 4 hours of inactivity. Call patient & ask to return it at next visit. You **MUST** go in & 'Unassign' the badge.

11. To **Close Capacity Maqnagment,** go to 'F**ile'** upper left toolbar & select **Exit.**
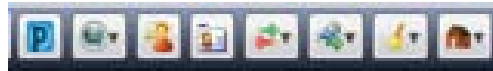

Setting Preferences: (see full prefs handout)

1. Click **Dashboard** upper toolbar, click **Hospital Building icon arrow,** select **SB Cancer Center**, click arrow select **MART**, click arrow **select MART 5th Floor RTLS** or **MART 6th Floor RTLS.**

2. To save 'Location' view to Favorites, click **Star with green +,** select **Add Current Location.** This will appear in the **Favorites Star** for easy access in future. Create additional ones for MART, 6thFloor RTLS.

3. To relocate **Dashboard** button & remove unnecessary ones, click '**Personalization'** on toolbar, select **Manage Perspective,** select **My Perspective Configuration**. Select & use arrows to move **'Dashboard'** to first position in 'My Perspecitve' box on right. Remove boards you do not use into the left box . Click **Save & Exit**. **Dashboard** button will be the first one on toolbar.

4. **List Properties**: click Dynamic Groups icon in Patient List, select 'Configure List Columns'. Check defaults: name, gender, current location, LOS, RTLS Location, Badge ID#, Badge Battery Status, MRN, FIN& Comment. Click **Close.**

5. **Toobar Icons:** PowerChart, PM Conversation, Assign/Unassign, Discharge.

STONY BROOK MEDICINE

Capacity Management and RTLS
in the **MART**

Quick Reference Guide

See your Unit Champion for additional help using *PowerChart* OR Call the HELP desk at 4-HELP (631-444-4357)