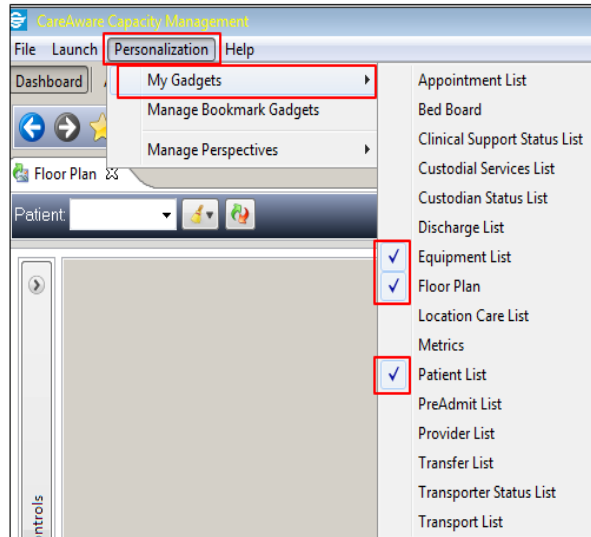
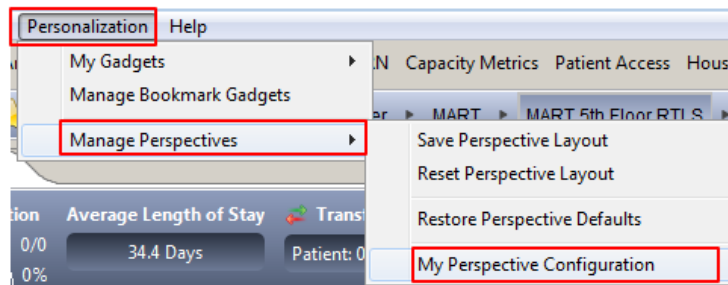


Preferences to Set in Capacity Management and RTLS

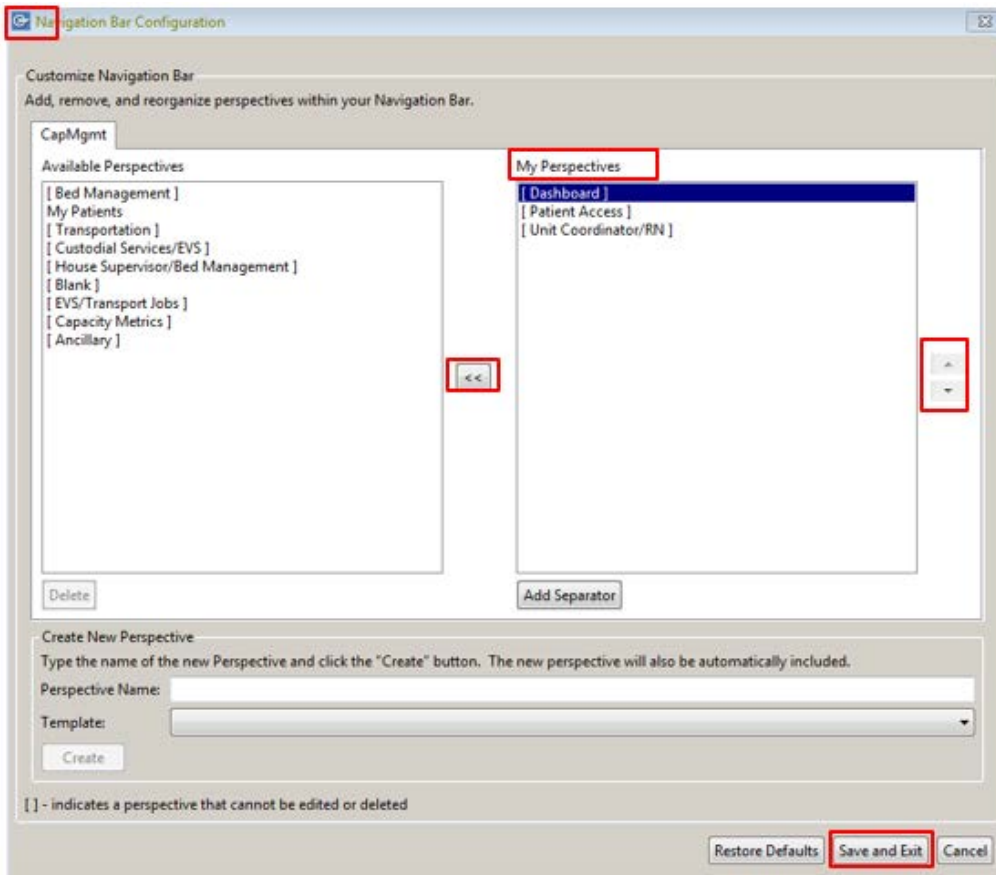
1. **Personalization** → **My Gadgets** → select **Equipment List, Floor Plan and Patient List**. (Some Admin may want 'Metrics'.)



2. **Personalization** → **My Perspective Configuration** → 'Dashboard' will default.



- Move the desired perspectives from the 'Available' pane to the 'My Perspectives' pane using the **arrows** in between, starting with **Dashboard** as the primary.
- Select and click the **back arrows** to remove ones you don't want.
- Use the **up & down arrows** to place in order of use.
- Click '**Save & Exit**' button when done.



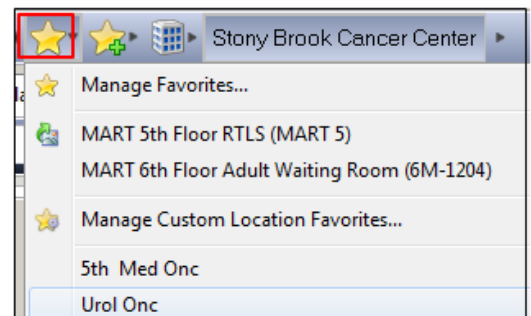
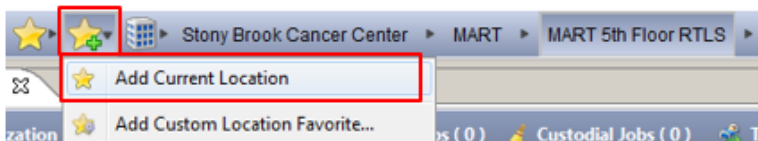
Since Capacity Management is utilized house-wide, other perspectives do not apply to the MART, ie, custodial services, bed management etc. You will see what is displayed in Prod and see if it applies to your needs.

- **Patient Access Reps:** can select the **Patient Access** list also, and put that as first in their listing
- **Unit Coordinator/RN:** Nurse Manager may prefer this view but it can pull in other hospital services.
- **Ancillary Staff:** may like to try this view to see if it meets their needs.

(Option to create a new custom perspective based on a specific template (lower pane) but this is not recommended for MART's limited use.)

3. Favorite Locations: if you want to view multiple locations without re-searching for them, you can save each one to a favorites list.

- **Add Locations to Favorites:** once you select **SB Cancer Center, MART, and a specific floor -**
 - Click on the **'Star with Green plus sign'**, select **'Add Current Location'**.
 - Next time you open, click on the plain **yellow Star** and your favorite locations will display; **select desired location from list.**

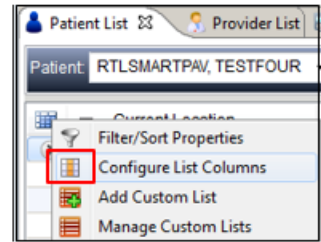
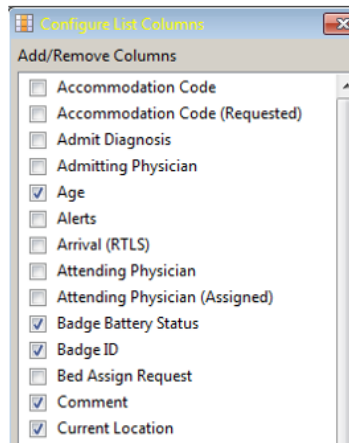


4. **Patient List Columns:** go to the lower pane click on **Dynamic Group** icon, select **'Configure List Columns'**

Select:

- Age
- Attending Physician
- Badge Battery Status
- Badge ID
- Comment
- Current location
- FIN (Optional)
- Gender
- LOS
- MRN
- Name
- RTLS Location

- Click **Close**.



- It click & drag column headers into desired position on toolbar for ease of workflow.

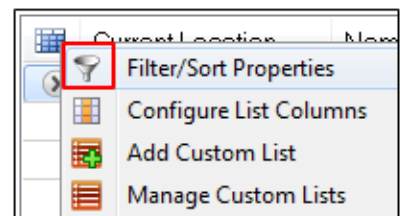
Recommended order:

- Current Location (Enc location, ie Med Onc)
- Name
- MRN,
- RTLS Location
- LOS
- Attending Physician
- Badge ID
- Battery Badge Status
- Age
- Gender
- FIN (optional)
- Comment

5. **Basic Filters:** Click any column header to filter display of Patient List, ie, **'Attending Physician'** – this will group all patients for each provider separately.

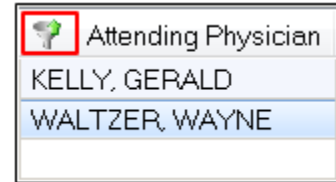
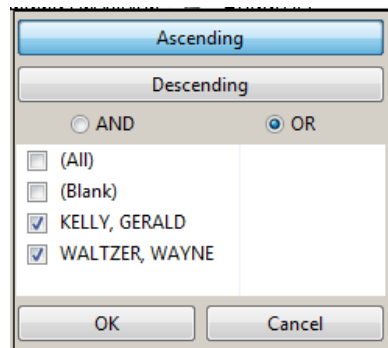
- **Current Location** column will group the list by the encounter locations, ie, Med Onc.
***NOTE:** if you click on Current Location, it will change your Floor Plan to that unit & list all patient in Med Onc
- Can click any **drop down arrow** next to a column header to filter/limit what displays/doesn't display in that column.

6. **Filter/Sort Properties:** click the **Dynamic Groups** icon and select **'Filter/Sort Properties'**



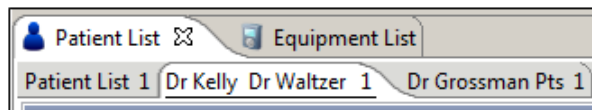
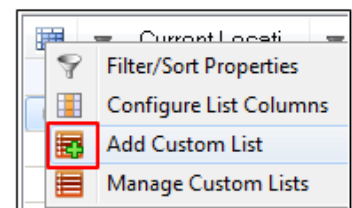
- A **drop down arrow** will appear next to each column header
- Can select **'Ascending'** or **'Descending'** view for that column

- Other inner selections are based on what is displaying that day, ie, All, Blank, Provider's Name etc depending which column you've selected.
- Click the **Check boxes** to display ONLY desired information, select **ascending or descending** order, click **OK**.
- Once you have filtered your view, a **'Funnel'** icon displays to show that it is a filtered view of what is available.



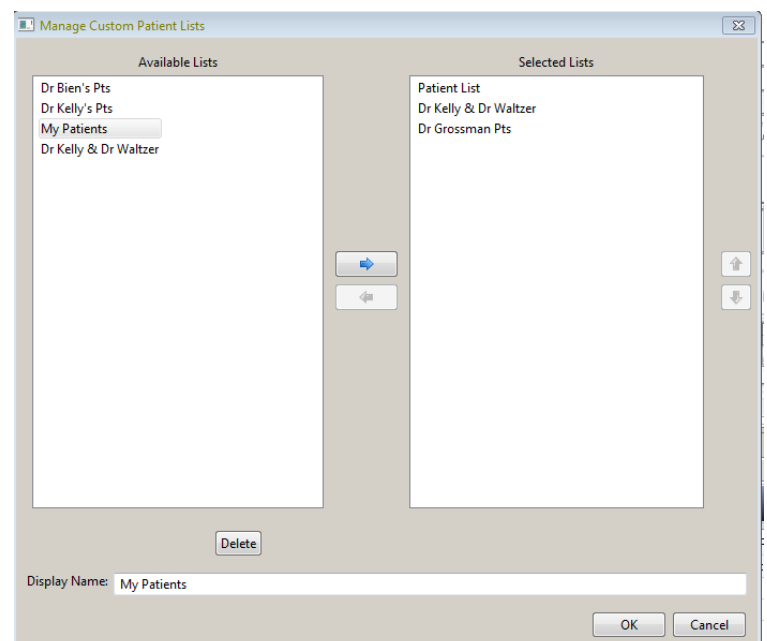
7. **Add a Custom List:** You can create custom lists based on available information such as lists for specific providers' patients, either single or multiple, pending your workflow needs. For example, if you work with Dr Choi and Dr Kelly's patient's on Mondays, create a list with those providers names and only those patients assigned to them will display for you.

- Click the Dynamic Group icon and select **'Add Custom List'**.
- Enter desired **Display Name**, ie, specific provider. **Click OK**.
- Additional tabs will display under the main Patient List tab. Click on desired custom list to view.



To change Custom Lists: click the Dynamic Group icon and click **'Manage Custom Lists'**

- Move Lists from Selected to Available panes (and back) by selecting and using arrows.
- **To Delete a list**, select it and it will display in lower pane, click **'Delete'** button.
- **Click OK** when done



TBD

8. Equipment List: same as above, click **Dynamic Group** Icon & select **Configure List Columns**

- Arrival (RTLS)
- Badge Battery Status
- Badge ID
- Comment
- Description
- Model Number
- Owning Location
- RTLS Location
- Serial Number

Click **Close**. Left click & Drag columns in desired order.

Recommend: RTLS Location, Description, Model #, Serial #, Owning Location, Arrival (RTLS), Badge ID, Badge Battery Status Comment

Options to Filter Patient List: click Dyn Group icon, select '**Filter/Sort Properties**'

This adds a sort up/down arrow to all column headers. Ie, Attending Physician. Can select 'All' or by specific Name(s) in list to separate according to physician.

LOS – filter with > Hrs or < Hrs.

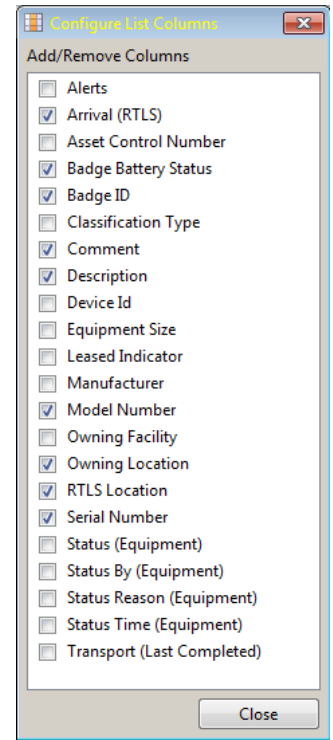
Once done, you can go back to Personalization, select Manage Perspectives and Save Perspective Layout, then Name your perspective ie Dr Bien's patients.

Does this on top by Dashboard

Maybe better to do a Manage Custom List. – select provider & filters etc in bottom, then click '**Add Custom List**', name it and it saves as additional list next to Patient List.

Click **Manage Custom Lists** to remove from Selected to Available or Delete

*Go back to **Filter /Sort Properties** and click on it to remove the ↑ & ↓ arrows on column headers & set prefs.



Available Lists

Dr Bien's Pts
Patient List
Dr Kelly's Pts

Selected Lists

My Patients
Dr Grossman Pts



Delete

Display Name:

OK

Cancel