



Infor Care Workloads User Guide

Version 4.0.0.0

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Introduction

Infor is the world's leading provider of patient dependency and staff workload analysis solutions. Infor has created actionable business solutions aimed at improving quality patient care. By combining over 30 years of patient quality workload information with the respected GRASP® Methodology, over 800 hospitals worldwide have embraced the Infor solution as a standard operating practice.

Infor has developed the software application to enable swift data collection and accurate data analysis. It is a one-of-a-kind solution that not only supports the GRASP® Methodology but also incorporates it into a single easy-to-use solution.

This Guide has been designed to provide a quick introduction to Infor Care Workloads and then to explain all of the detailed functionality available. This Guide does not provide information on the setup or administration of Infor Care Workloads. For information on these tasks please see the **Infor Care Workloads Installation Guide** and **Infor Care Workloads Administrator Guide**. This Guide also does not explain the GRASP® Methodology nor the logic behind some of the tasks presented. For more information please see the **Infor Care Workloads Administrator Guide**.

This documentation is based upon **Infor Care Workloads Version 4.0.0.0**. Other versions may differ in look, feel, &/or functionality.

Browser Requirements & Customizations

Infor Care Workloads is a web based application that is viewed through a web browser. A variety of web browsers are available and Infor Care Workloads can be viewed through many of these including:

- Microsoft Internet Explorer
- Mozilla Firefox
- Google Chrome
- Apple Safari
- Opera

Each browser will render Infor Care Workloads slightly differently. Infor recommends the use of Microsoft Internet Explorer.

You may wish to customize the Text Size or the Zoom to enhance the readability of Infor Care Workloads. In Microsoft Internet Explorer both of these items can be found in the View drop down menu in the upper left toolbar. Alternately you will find the Zoom option under the Gear icon or in the bottom right hand corner of the browser window.

- To change the Text Size simply select the desired size from the list.
- To change the Zoom simply select the desired size or zoom percentage from the list.

Each browser offers different customizations. If you are not utilizing Microsoft Internet Explorer please see your System Administrator for help with Browser Customizations.

Getting Started – A Quick Overview

This section provides a quick overview of Access, Log In, and Scoring Workload. These basic functions are all that is needed to get started using Infor Care Workloads. For additional details and functionality please refer to the **Using Infor Care Workloads** section.

To launch Infor Care Workloads open a web browser and navigate to the URL for your facility. The web browser and address will vary by facility, please check with your administrator for this information.

To log in to Infor Care Workloads enter the User Name and Password provided by your Administrator and click Log In.

If this is the first time that you have logged on to Infor Care Workloads or your password has expired, then you will be immediately prompted to change your password. Please refer to the **Logging In** section for information on changing your password.

Once you have logged in your User Name is displayed in the upper right corner. If you step away from the computer and come back, you should check this to ensure that another user has not logged in while you were away.

When Infor Care Workloads is loaded you will be placed on the Patient Workload page showing Patients for the current Date & Shift in either your Default Unit or the last Unit that you worked on. You may need to change the Unit, Date, or Shift to list the correct Patients. Please refer to the **Parameter Selection** section for information on changing these parameters.

Patients without Workload scored will display in red in this list. To Score Workload double-click the row for the desired Patient and Instrument. The Score Workload page will open.

To Score Workload scroll through the list of Interventions and click on the checkbox next to those Interventions that are applicable. If you are unsure if the Intervention is applicable click the  (Information) icon to display that Intervention's Definition.

When ready click the Save button to close this page and return to the Patient Workload page. The patient's name will now display in black indicating that they have been scored. The **Workload Value** in hours will appear in the **Workload Value** column.

To logout of Infor Care Workloads click the Logout link in the upper right corner.

Using Infor Care Workloads

This section provides full details on the use of Infor Care Workloads. This section does not provide details about the GRASP® Methodology, but does refer to it when necessary. For details on the GRASP® Methodology please refer to the **Infor Care Workloads Administrator Guide**.

To launch Infor Care Workloads open a web browser and navigate to the URL for your facility. The web browser and address will vary by facility, please check with your administrator for this information.

Logging In

To log in to Infor Care Workloads enter the User Name and Password provided by your Administrator and click Log In.

In some cases the User Name and Password will be the same information used to access E-Mail and other Hospital Systems. This is often referred to as your **Active Directory (AD)** login. Please refer to that section for information regarding this process.

Setting Language at Login

If your Administrator has made additional languages available you may change your language by selecting it from the **Select Language** drop down box in the upper right corner of the Login screen.

Your selection will be immediately saved and applied as your Default Language when you complete the login process. Changing the Language will change the “hard” text on all pages to reflect that Language. Text entered into the application by the Administrator or other Users, such as Intervention Description & Unit Name, will not be translated.

If no additional Languages are available you will not see this option.

Changing Password on Initial Login

If this is the first time that you have logged on to Infor Care Workloads or your password has expired, then you will be immediately prompted to change your password. You will need to enter your Username and current Password before entering a New Password and confirming.

The New Password may need to meet requirements selected by your Administrator. If the New Password does not meet these requirements a warning message will be displayed indicating what requirement(s) was not met.

When you have successfully changed your password an alert will indicate the change and provide you with a **Click Here to Log In** link.

Active Directory Login

If an **Active Directory** (AD) system is implemented at your facility then your User Name and Password will be the same information used to access E-Mail and other Hospital Systems. You will know that this is enabled if you see an  (Active Directory) icon at the bottom of the login page.

Active Directory will still require you to enter your User Name and Password each time you access Infor Care Workloads. This is particularly important in a hospital environment where the PC is frequently logged in as a generic user.

After Logging In

Once you have logged in your User Name is displayed in the page header. If you step away from the computer and come back, you should check this to ensure that another user has not logged in while you were away.

If **Active Directory** Authentication (AD) is in use then you will additionally see an icon indicating the AD status. Hover your mouse cursor over either of these icons to view text about the login status.

Automated Timeout

To prevent misuse of Infor Care Workloads, and to ensure the security of your user account and your patients, Infor Care Workloads will automatically timeout after a period of inactivity. The length of this period is determined by your Administrator, but it is typically between 5 and 20 minutes. In order to keep your session active you will need to perform some activity that refreshes data from the server. This can be as simple as clicking on your browser's Refresh button or pressing the **F5** key.

Two (2) minutes prior to the timeout you will be presented with a warning.

- If you do not acknowledge the warning message before the two minutes elapse then you will be automatically logged out.
- If you do acknowledge the warning message but do not perform any activity then you will be automatically logged out.

If you are automatically logged out you will need to re-login and restart any tasks that you were working on.

Top Navigation

Top Navigation is available on all pages of Infor Care Workloads.

Top Navigation options are:

- Logout
- Help

Logout

To logout of Infor Care Workloads click the Logout link. You will be redirected to a page with a **Click Here to Log In** link. This will return you to the Login Page. If this link is not clicked after 30 seconds the page will automatically change to the Login page.

Help

Click on the **Help** link to access helpful information about Infor Care Workloads. This User Guide as well as additional Help options are available on this page.

The Phone Number and E-Mail Address will be set by your Administrator providing you with contact information for your facility. To return to the Patient Workload page click the Infor logo in the upper left corner.

Parameter Selection

All pages use the selected Unit, Date & Shift to determine what data is displayed on the page. The Patient Workload page also allows you select Caregiver options.

Selecting a Unit

When Infor Care Workloads is opened for the first time a Unit may not be selected, you may see the text **Click to Select Unit**. If a Unit is already selected you may click on it to select a different Unit.

When you click to change the Unit you will see a drop down box at the top.

The options in this drop down box are:

- Units – The standard view.
- Programs – An alternate view that groups like Instruments from various Units.

Normally this option is set to Units. You will also see + / -. These two links may be used to fully expand the Unit Tree or to completely collapse the Unit Tree.

The list of Units will be tailored to your Hospital. Your Administrator may choose to give you access to all Units or to only those Units that you will be working in. Your list of Units may vary from your coworkers list depending on the Units that your Administrator has given each of you access to.

Once you find the desired Unit click the Unit Name to select that Unit.

Selecting a Date

Each time you open Infor Care Workloads the Date will be set to the current Date. You may change the selected Date by clicking on the Date value and selecting a new Date from the calendar.

If the Unit that you are working in has been designated as a Prospective Unit by your Administrator the Date may automatically be pushed ahead by one day depending upon the time of day that you login. For example, if you login at 20:00 (8:00 PM) and the Unit is Prospective you may be expected to Score Workload on the Day shift for the following day. Infor Care Workloads will automatically change the Date to the next day and automatically set the Shift to Day when you login.

To maintain system performance and provide fast, reliable reporting Infor Care Workloads will archive data entered before a specified Date set by the System Administrator. If the Date that you want to select is displayed in gray then data for this Date has been archived and is no longer available within Infor Care Workloads.

To view data for archived Dates you will need to use the Infor Care Workloads Reports. For more information on Reports please see the **Reports** section.

Selecting a Shift

When Infor Care Workloads is opened or the Unit is changed the Shift will be automatically selected based upon the time of day. The Shift can be changed by clicking on the Shift Name. When the Shift selection is open you can hover over the available Shifts to see a Tool-Tip with the Date & Time range for that Shift.

If the Unit that you are working in has been designated as a Prospective Unit by your Administrator the Shift may automatically be pushed ahead by one Shift based on the time of day. The arrow buttons may be used to select the Previous and Next Shifts respectively.

If the currently selected Shift is the first Shift of the current Date and the Previous button is clicked then the selected Date will be changed to the previous day. Likewise if the currently selected Shift is the last Shift of the current Date and the Next button is clicked then the selected Date will be changed to the next day.

Selecting Caregiver Options

Caregiver Options are only available on the Patient Workload page. By default this setting will be **All Patients**.

The available options for Caregiver are:

- All Patients – displays all Patients regardless of the Caregiver assignment.
- My Patients – displays only those Patients assigned to the currently logged in User.
- Unassigned Patients – displays only those Patients with no Caregiver assignment.
- Caregiver's Patients – displays those Patients assigned to a selected Caregiver.

Workspace Navigation

The Infor Care Workloads Workspaces are:

- Workload
- Staffing
- Reports
- Patient Search
- Preferences

To navigate to any of these Workspaces click the respective link in the Navigation Bar.

Workload

The Workload Workspace has four (4) Sub-Workspaces:

- Patient Workload
- Non-Patient Workload
- Indirect Workload

- Questionnaires

To navigate to any of these Sub-Workspaces click the respective links in the Sub-Navigation Bar.

Patient Workload

The Patient Workload Workspace is where most users spend the majority of their time while working with Infor Care Workloads. In most facilities the list of Patients will be automatically populated by the Admit-Discharge-Transfer (ADT) System.

Patients whose names appear in black have workload scored for the specified Instrument on the selected Date and Shift. Patients whose names appear in red have not been scored.

The second (2nd) column displays applicable icons for each Patient. If an Alert(s) has been assigned to a Patient an  (alert) icon will be displayed.

To check what Alert(s) has been assigned click the down arrow to expand the Actions for that Patient and go to **View / Update** → **Alert Codes** or simply click on the  (alert) icon.

For more information on Alert Codes please refer to that section.

If the Patient has been Signed-Out a gray dot will be displayed. To Sign the Patient back in click the down arrow to expand the Actions for that Patient and go to **ADT Functions** → **Sign-In** or simply click the gray dot.

If this Action is not available your Administrator may have limited your access to this Action. This may be because the Sign-Out process is automated by the ADT System. Even if the Patient is Signed-Out you may be able to Score Workload for the Patient if your Administrator has made this option available.

If today is the Patient's Birthday then a  (birthday cake) icon will be displayed.

Paging and Filtering Patient Workload

Paging

To make the Patient Workload page easier to use the list of Patients is 'paged' so that only a set number of Patients are displayed in the list at any one time. By default 25 Patients are displayed on each Page. This value can be found at the bottom of the list of Patients. To change this value, simply type the desired numerical value into this box and press the Enter key. The currently selected page is underlined.

To change the selected page, simply click on the desired page number. If a Patient has been selected (for example, by Scoring Workload for that Patient) then the page will be automatically selected to display that Patient.

Filtering

While the Patient Search function can help to find a Patient throughout the hospital it is sometimes helpful to simply limit the displayed Patients using a Filter to quickly find a Patient. At the top of the list of Patients is a **Patient Filter** textbox.

To filter the list of Patients simply type all or part of the Patient's Name, Hospital Patient ID, or Encounter Number then press the Enter key. The results will only display Patients that contain the specified text. To clear the filter simply delete the text and press the Enter key.

Patient Workload Actions

To access the Patient Workload Actions for a selected Patient click the down arrow. When the Patient Actions menu is open you may minimize it by clicking the now up arrow. The currently selected Patient's Action menu will automatically collapse if you expand the Actions menu for a different Patient.

Score "[Instrument Name]"

The Score "[Instrument Name]" Patient Action group provides links to score Workload, Interrater Monitor (IRM), Percent of Care Delivered (PCD), and score Workload for a Group of Patients.

Workload

To Score Workload for a Patient you can either Double-Click the row for the Patient or click the link for **Score "[Instrument Name]" » Workload**. This will open the **Score Workload** page.

At the top of the Score Workload page the Patient's Name, selected Instrument, Date, and Shift will be displayed. If you have opened this page from the wrong Shift you may click the drop-down box and select the correct Shift.

Scoring

To include an Intervention in the score simply click the checkbox such that a checkmark appears. To remove an Intervention simply click the checkbox such that the checkmark no longer appears.

2Mandatory Interventions

Interventions displayed with a grayed out checkbox have been setup as Mandatory Interventions by the Administrator and cannot be unchecked. These Interventions will always be included when Workload is scored.

3Intervention Descriptions

If clarification on a particular Intervention is required simply click the  (information) icon. This will open the Intervention Description providing the complete definition of the Intervention. To close the Intervention Description simply click the  (close) icon.

4Count & Minutes Interventions

Interventions are sometimes presented as **Count** or **Minutes** Interventions because they are hard to estimate. Each of these types of Interventions will require the additional step of entering the Value. Count Interventions are highlighted in blue, whereas Minutes Interventions are highlighted in green.

An Intervention is often marked as a Count Intervention if we know how long the Intervention takes to complete, but the number of times that it is performed is variable. The default count value will be one (1) indicating that the Intervention was performed one (1) time. Enter the number of times that it was completed. This value may be updated later if needed.

An Intervention is marked as a Minutes Intervention when the time to complete the Intervention is not predictable. The default Minutes value will be one (1) indicating that the Intervention took one (1) minute to complete. Enter the number of minutes required to complete the Intervention. This value may be updated later if needed.

5 Mutually Exclusive Interventions

Some Interventions will utilize Infor Care Workloads' Mutually Exclusive capability. This prevents two (2) Interventions that might overlap in their definitions from being selected at the same time. For example, if the Assessment section of the Instrument includes:

- Shift/update assessment 1-3 active problems
&
- Shift/update assessment 4 or more active problems

We most likely only want to select one of these.

If "Shift/update assessment 1-3 active problems" is selected and you click "Shift/update assessment 4 or more active problems" an alert will be presented

Follow the instructions of the alert. Clicking **OK** will uncheck the currently selected Intervention. Clicking **Cancel** will leave the currently selected Intervention checked. In this example, clicking **OK** would uncheck "Shift/update assessment 1-3 active problems" and check "Shift/update assessment 4 or more active problems". Clicking **Cancel** would cancel the change leaving "Shift/update assessment 1-3 active problems" checked and "Shift/update assessment 4 or more active problems" unchecked.

6 Group Mutually Exclusive Interventions

Some Interventions will utilize Infor Care Workloads' Group Mutually Exclusive capability. This prevents a single Intervention from being selected when any of a selected group of Interventions is selected. This might be found when one Intervention is defined as a larger process that incorporates several other processes that are listed individually. If you click the parent Intervention and some or all of the child Interventions are currently selected you will be presented with an alert beginning with: **"[Parent Intervention]" is a Group Mutually Exclusive Parent of: ...**

Follow the instructions of the alert as needed. Clicking OK would uncheck any applicable Child Interventions and keep the Parent Intervention. Clicking Cancel would cancel the change and make no changes to the checked items.

If you click a child Intervention and the parent Intervention is currently selected you will be presented with an alert beginning with: **[Child Intervention]" is a Group Mutually Exclusive Child of: ...**

Follow the instructions of the alert as needed. Clicking OK would uncheck the Parent Intervention and keep the Child Intervention(s). Clicking Cancel would cancel the change leaving only the Parent Intervention checked.

7 Mutually Inclusive Interventions

Some Instruments will utilize Infor Care Workloads' Mutually Inclusive capability. This is frequently used to facilitate the selection of Levels or Protocols. If an Intervention has been designated as a Mutually Inclusive parent an up/down arrow will be displayed.

Checking a Mutually Inclusive parent will automatically check all of the Interventions that have been designated as Mutually Inclusive children of that parent. This allows you to simply click one Intervention but provides itemized data for later analysis. For example, the "Liver Transplant Protocol" might be made up of 15 Interventions, but you only have to click once.

When you check the Mutually Inclusive parent the children of that parent will be automatically checked and the Workload Value will be automatically calculated.

If you uncheck any of the child Interventions the Workload Value will be automatically recalculated to accommodate the change.

Clicking the up/down arrows allow the Mutually Inclusive children to be hidden or displayed respectively. This allows the length of the Instrument to be made shorter for quicker usage or for you to see all of the Interventions that have been automatically included.

8Statistics

Some Interventions will be marked as Statistics by the Administrator. These Interventions will have their Workload Values displayed in gray.

An Intervention that is marked as a Statistic will not have its Workload Value counted towards the Total Workload Value. However, these Interventions are important to the GRASP® Methodology and should not be overlooked.

9Variable Indirect Workload

Variable Indirect Workload may be automatically included by the Administrator. If so, it will be listed at the bottom of the list of Interventions.

For details on **Indirect Workload** please refer to that section.

When ready click the Save button to close this page and return to the Patient Workload page. The **Workload Value** in hours will appear in the **Workload Value** column. If another user has updated the Workload Value since you opened the **Score Workload** page you will be alerted.

Click OK to save your changes. Or click Cancel to return to the Score Workload page.

Interrater Monitor (IRM) Rater Mode

Using Interrater Monitors is a key to the GRASP® Methodology. IRMs ensure the reliability of Infor Instruments by providing a check and review process. Score **Interrater Monitor Rater Mode** is the first step in this two (2) step process. In this step a specially trained staff member enters the Workload for the Patient based on documentation. This will then be compared to the Workload entered by the Provider in step two (2) of this process, **Reason Mode**. The GRASP® Methodology requires a minimum of 10% of the average daily census per week to be evaluated using IRMs. The percent agreement between the Provider and Rater should be between 90% & 110%.

To Score Interrater Monitor Rater Mode for a Patient click the link for **Score "[Instrument Name]" » Interrater Monitor » Rater Mode**. Note that this option will not be available until the Score Workload process has been completed.

This will open the Score IRM Workload page. The process of scoring IRM Workload is exactly the same as scoring regular Patient Workload. Please refer to that section for details on this process.

When ready click the Save button to close this page and return to the Patient Workload page. The IRM Status will now show **Rater Scored** and **Reason Mode** will now be available.

Interrater Monitor (IRM) Reason Mode

Using Interrater Monitors is a key to the GRASP® Methodology. IRMs ensure the reliability of Infor Instruments by providing a check and review process. Score Interrater Monitor Reason Mode is the second step in this two (2) step process. In this step the Workload entered by the Provider and the Rater is compared and evaluated. This typically involves a face-to-face meeting of the two (2) persons involved. Any discrepancies are given a reason such as “Care Plan Differed” to explain why the Workload did not match. The GRASP® Methodology requires a minimum of 10% of the average daily census per week to be evaluated using IRMs. The percent agreement between the Provider and Rater should be between 90% & 110%.

To Score Interrater Monitor Reason Mode for a Patient click the link for **Score “[Instrument Name]” » Interrater Monitor » Reason Mode**. Note that this option will not be available until the Score Workload & Score Interrater Monitor Rater Mode process has been completed.

This will open the Score IRM Reasons page. Only the Interventions checked by either the Provider or the Rater will be displayed. Any discrepancies between the Provider and the Rater will be highlighted in red. These items will also display a drop down list in the **Disagreement Reason** column. Click this drop down list to select the appropriate reason for the discrepancy.

When ready click the Save button to close this page and return to the Patient Workload page. The IRM Status will now show **Completed** and the **IRM Score** will now show the percent agreement between the caregiver and the rater. If these columns are not visible, they can be added by going to Preferences. Please refer to this section on how to add columns.

Percent of Care Delivered

Using Percent of Care Delivered (PCD) is another way to evaluate the reliability of an Instrument provided by the GRASP® Methodology. PCD is a one step process that is simpler than IRMs, but does not always provide the face-to-face review of the IRMs. PCDs are frequently used for Retrospective Instruments where IRMs are frequently used for Prospective Instruments.

To Score Percent of Care Delivered for a Patient click the link for **Score “[Instrument Name]” » Percent of Care Delivered**. Note that this option will not be available until the Score Workload process has been completed.

This will open the Score Percent of Care Delivered page. All Interventions will be displayed. If the Intervention was checked by the Provider then a checkbox will appear in the Provider column. The Rater can enter the percentage of how much of that Intervention was completed in the PCD column. This might be more or less than 100%.

The Rater can then select a **Disagreement Reason** for why the Care Delivered was not 100%.

When ready click the Save button to close this page and return to the Patient Workload page. The PCD Status will now show Completed and the PCD Score will now show the Percent of Care

Delivered as entered by the Rater. If these columns are not visible, they can be added by going to Preferences. Please refer to this section on how to add columns.

Workload for Group of Patients

Score Workload for a Group of Patients provides a quick way to score workload that is the same for multiple patients. This is particularly useful for group sessions where a single Provider might provide services for a large number of patients.

To Score Workload for a Group of Patients click the link for **Score “[Instrument Name]” » Workload for a Group of Patients**.

This will open the Score Workload for Group of Patients wizard.

The first step of this wizard is to select the Date, Instrument, and Shift. These values will be defaulted to the currently selected Patient but can be changed if needed. When ready click Next to select the Patients.

Click the checkbox such that a checkmark appears for the Patients that you want to Score Workload. If you want to Score Workload for all of the Patients listed simply click the checkbox for “Select all Patients”.

When ready click the Finish button to open the Score Workload for Group of Patients page.

The process of scoring Workload for a Group of Patients is exactly the same as scoring regular Patient Workload. Please refer to that section for details on this process.

When ready click the “Save” button to close this page and return to the Patient Workload page. The **Workload Value** in hours will appear in the **Workload Value** column for each of the select Patient(s).

Caregiver

Caregiver assignment can be used to provide users with a way to filter the list of Patients to just those Patients that they are providing care for. Several reports also utilize the Caregiver assignment to show Continuity of Care. Caregiver assignment is made by Instrument allowing for multiple Caregivers to be assigned if the care required for the Patient includes multiple Disciplines. The Caregiver Patient Action group allows the user to Assign [a Caregiver for the] Selected Patient as well as for Group of Patients. The user can also view the Caregiver History for the selected Patient.

Please refer to the **Filtering** section for details on how a user can filter the list of Patients by Caregiver.

Caregiver assignment typically terminates at the end of the Shift on which the Caregiver was assigned. However, the Administrator may select to have this assignment Clear Once per Day or even to Never Clear. This might be found in Long Term Care Facilities or some Allied Health Disciplines. Please check with the Administrator if you have questions about this setting.

Assign Selected Patient

To Assign a Caregiver for the Selected Patient click on **Caregiver » Assign » Selected Patient**.

This will open the “Assign Caregiver » Selected Patient” page.

By default the list of Caregivers will only show those Caregivers that have access to the selected Instrument. However, a Caregiver that does not have access to the selected Instrument may be chosen by using the Show all Caregivers option.

To select a Caregiver click the drop down list and select the Caregiver from the list of available Caregivers.

When ready click the Save button to close this page and return to the Patient Workload page. The Caregiver assignment will now appear in the **Caregiver** column for the selected Patient.

2Assign Group of Patients

To Assign a Caregiver for a Group of Patients click on **Caregiver » Assign » Group of Patients**. This will open the Assign Caregiver » Group of Patients wizard.

The first step of this process is identical to the Assign a Caregiver for the Selected Patient process with the exception that you can make changes to the Date, Unit, and Shift. When ready click “Next” to select Patients.

Click the checkbox such that a checkmark appears for the Patients that you want to Assign a Caregiver. If you want to Assign a Caregiver for all of the Patients listed simply click the checkbox for “Select all patients”.

When ready click the Finish button to close this page and return to the Patient Workload page. The Caregiver assignment will now appear in the **Caregiver** column for the selected Patient(s).

3History

Caregiver History shows the details of what Caregiver has been assigned to the selected Patient during their visit. This is specific to the selected Instrument, if the Patient has more than one Instrument assigned then each Instrument will show a unique Caregiver History specific to that Instrument. To view the Caregiver History for a Patient click on **Caregiver » History**.

This will open the Caregiver History page for the selected Patient. This is a Read-Only page showing the full Caregiver History for the selected Patient.

Instruments

Instruments are the cornerstone of the GRASP® Methodology. An Instrument is a set of Interventions (or actions) that are commonly performed during daily practice. Ensuring that the proper Instrument is attached to the Patient is extremely important to ensure the Workload recorded matches the care provided. Multiple Instruments can be assigned to a single Patient Encounter allowing Infor Care Workloads to capture workload for the various Disciplines required to provide care for the Patient.

The Instruments Patient Action group allows the user to View / Update Active Instruments as well as Attach [an] Instrument to a Group of Patients.

1View / Update Active Instruments

To View / Update Active Instruments click on **Instruments » View / Update Active Instruments**. This will open the “View / Update Active Instruments” page for the currently selected Patient.

This page displays the Instrument Name as well as the Discipline for the Instrument, the Assigned Date & Time and also the Removed Date & Time. The Effective Start Date and Effective End Date are calculated using the Admit and Discharge Dates as well as the Transfer-In and Transfer-Out Dates. These values may differ from the Assigned Date & Time or Removed Date & Time Dates based on these dates.

To Edit an Instrument click on the  (edit) icon.

The Instrument as well as the Assigned Date & Time and also the Removed Date & Time may be modified. It is only recommended to change the Instrument if no Workload has been collected. This might happen if this Instrument is the default Instrument assigned to patients upon admission, but the actual workload differs. An example of this might be in a Mother/Baby Unit where the Hospital's Admit-Discharge-Transfer (ADT) System does not differentiate between the Mothers and the Babies. All patients might be assigned the "Mother" Instrument by default, but this needs to be changed for the "Babies".

The Removed Date & Time can be used to stop displaying the selected Instrument. This might be useful if the patient's condition has changed and a new Instrument is more appropriate. To completely remove an Instrument click the trashcan icon. You will be prompted prior to completing this action. This should only be done when no workload has been collected. To add a new Instrument click the plus sign icon.

Click the drop down list for Instrument to select the appropriate Instrument. Enter an Assigned Date & Time and Removed Date & Time as needed. If the selected Instrument is already attached you will be prompted that this will create duplicate entries. Even though duplicate entries might exist, only a single row will be displayed on the Patient Workload page for the Instrument. Click the  (Save) button to save the newly added Instrument.

When ready click Close to return to the Patient Workload page. Any changes will be immediately reflected.

2 Attach Instrument to a Group of Patients

To Attach Instruments to a Group of Patients click on **Instruments » Attach Instruments to a Group of Patients**.

This will open the Attach Instruments to a Group of Patients wizard.

The Assigned Date, Removed Date, and Instrument will default to the currently selected values, but you may change these as needed.

A note will be displayed at the bottom of the page indicating how many patients are available for the selected criteria. Any patients with the instrument already attached on the selected date and shift will not be available to attach the selected instrument.

If no patients match the selected criteria then a note will be displayed indicating this. This means that all patients on the unit already have the selected instrument for the desired date and shift.

Click Next to open the second step of the wizard, Select Patients.

Click the checkboxes such that a checkmark appears for the Patient(s) that you want to Assign the Instrument. Some Patients will be displayed in gray and will not be enabled; these Patients already have the selected Instrument assigned.

If you want to Assign the Instrument for all of the Patients listed simply click the checkbox for Select all Patients.

When ready click the Finish button to close this page and return to the Patient Workload page. The Instrument assignment will now appear for the selected Patient(s).

View / Update

The View / Update Patient Action group provides the ability to view &/or update:

- Alert Codes
- ADT History
- Patient Information
- Workload History

1Alert Codes

Alert Codes are used to highlight a Patient so that all users know of special needs or are warned of special issues. Such alerts might include a “Name Alert” if more than one (1) Patient on the Unit has the same name or “Choking” to indicate that the Patient is at risk of choking. When an Alert Code is assigned to a Patient an  (alert) icon will be displayed on the Patient Workload page.

To View & Update Alert Codes click on **View / Update » Alert Codes** or simply click on the  (alert) icon in the list of Patients. This will open the Alert Codes page.

To add a new Alert to a Patient click the checkbox such that a checkmark appears for the Alert(s) that you want to assign to the Patient. Previously assigned Alert(s) will already be checked.

When ready click the Save button to close this page and return to the Patient Workload page. The Alert Code assignment will now appear for the selected Patient.

If you want to clear or remove an Alert Code follow this same process and uncheck the assigned Alert Codes that are no longer applicable.

2ADT History

ADT History provides a Read-Only historical record of all Admit-Discharge-Transfer (ADT) transactions that have been processed for the selected Patient. This may not include simple updates performed by the ADT System (processed as ADT A08 Messages) that do not change the status of the Patient. This will include actions sent to Infor Care Workloads by the hospital’s ADT System as well as any ADT transactions completed exclusively within Infor Care Workloads. To View ADT History click on **View / Update » ADT History**.

This will open the “ADT History” page. This is a Read-Only page. When done click the Back to Previous Page link above the list to return to the Patient Workload page.

3Patient Information

The Patient Information page displays information about the Patient and the selected Encounter. This information may be updated if the Administrator provides you with the ability to do so, however

it is often updated within the hospital's HIS system. To View & Update Patient Information click on **View / Update » Patient Information**.

This will open the Patient Information page.

The Patient Information page has three (3) sections:

- Patient Information
- Visit Information
- Extended Information

Patient Information includes:

- Hospital ID
- First Name
- Middle Name
- Last Name
- Birth Date
- Gender
- Religion

Extreme care should be taken when changing the Hospital ID as this is the common identifier used by other systems throughout the hospital to identify the Patient.

Visit Information includes:

- Encounter Number
- Visit Number
- Room/Bed
- Admission Code
- Patient Type
- Patient Service
- Admit Date & Time
- Discharge Date & Time
- Transfer-In Date & Time
- Transfer-Out Date & Time

Extreme care should be taken when changing the Encounter Number as this is the common identifier used by other systems throughout the hospital to identify the Patient's Encounter. Care should also be exercised when modifying the Admit, Discharge, Transfer-In & Transfer-Out, Date & Time values. These values are provided by the hospital's ADT system.

Extended Information is typically blank, but can be used to display things such as the Attending Physician and Allergies. The Administrator can determine what information is presented in this section. This information is always Read-Only and is populated exclusively by the ADT system.

When ready click the Save button to close this page and return to the Patient Workload page. Any changes will be immediately reflected for the selected Patient.

4Workload History

Workload History provides a Read-Only historical record of all Workload transactions for the selected Patient. This includes Workload captured by all Instruments to provide a complete view of the Workload performed. To View Workload History click on **View / Update » Workload History**.

This will open the Workload History page.

This is a Read-Only page displaying:

- Unit
- Date
- Shift
- Instrument Name
- Encounter
- Workload Value
- Workload Date
- The User that entered the Workload.
- The Date that the Workload was entered.
- Interrater Reliability Monitor (IRM) Value
- The User that entered the IRM.
- The Date that the IRM was entered.
- Percent of Care Delivered (PCD) Value
- The User that entered the PCD.
- The Date that the PCD was entered.

When you are done click the Back to Previous Page link above the list to return to the Patient Workload page.

Delete

The Delete Patient Action group provides the ability to delete information from Infor Care Workloads. All Delete actions should be used with extreme caution.

1Workload Score

The Delete Workload Score Patient Action allows the user to delete an erroneously entered Workload Score. To Delete a Workload Score click on **Delete » Score » Workload**. This will open the Delete » Score » Workload confirmation page.

Validate that this is indeed the information that you want to delete and click Delete. This will return you to the Patient Workload page reflecting the deleted value.

2Interrater Monitor Score

The Delete Interrater Monitor Score Patient Action allows the user to delete an erroneously entered Interrater Monitor Score. To Delete an Interrater Monitor Score click on **Delete » Score » Interrater Monitor**. This will open the Delete » Score » Interrater Monitor confirmation page.

Validate that this is indeed the information that you want to delete and click Delete. This will return you to the Patient Workload page reflecting the deleted value.

3Percent of Care Delivered Score

The Delete Percent of Care Delivered Score Patient Action allows the user to delete an erroneously entered Percent of Care Delivered Score. To Delete a Percent of Care Delivered Score click on **Delete » Score » Percent of Care Delivered**. This will open the Delete » Score » Percent of Care Delivered confirmation page.

Validate that this is indeed the information that you want to delete and click Delete. This will return you to the Patient Workload page reflecting the deleted value.

4Destination

The Delete Destination Patient Action allows the user to delete an erroneously entered Destination. This action should be used with extreme caution. Infor recommends that all ADT actions be carried out by the ADT system. To Delete a Destination click on **Delete » Destination**. This will open the Delete » Destination confirmation page.

Validate that this is indeed the information that you want to delete and click Delete. This will return you to the Patient Workload page reflecting the deleted value.

5Encounter

The Delete Encounter Patient Action allows the user to delete an erroneously entered Encounter. This action should be used with extreme caution. Infor recommends that all ADT actions be carried out by the ADT system. To Delete an Encounter click on **Delete » Encounter**. This will open the Delete » Encounter confirmation page.

Validate that this is indeed the information that you want to delete and click Delete. This will return you to the Patient Workload page reflecting the deleted value.

6Patient

The Delete Patient Action allows the user to delete an erroneously entered Patient. This action should be used with extreme caution. Infor recommends that all ADT actions be carried out by the ADT system. To Delete a Patient click on **Delete » Patient**. This will open the Delete » Patient confirmation page.

Validate that this is indeed the information that you want to delete and click Delete. This will return you to the Patient Workload page reflecting the deleted value.

ADT Functions

Infor recommends that all Admit-Discharge-Transfer (ADT) functions be carried out by the hospital's ADT system. This ensures a consistent list of Patients between Infor Care Workloads and other applications at the hospital. However, Infor recognizes that not all hospitals have an ADT system and that there are times at which is necessary to perform an ADT action separate from the hospital's ADT system. Therefore Infor provides the ability to:

- Admit
- Discharge

- Transfer
- Swap Beds
- Sign-In / Sign-Out
- Merge Patients
- Merge Encounters
- Cancel Admit
- Cancel Discharge
- Cancel Transfer

1Admit

The Admit ADT Function can be used to add a new Patient to Infor Care Workloads or add a new Encounter for an existing Patient. This correlates to the HL7 A01 function, for more information on HL7 functions please see the **Infor Care Workloads HL7 Guide**. This function is not directly related to an existing Patient and so is not displayed in the ADT Functions Patient Action, but rather at the top of the Patient Workload page. To open the Admit Patient function click on Admit new Patient....

This will open the Admit New Patient wizard to the Patient Information page. Before proceeding you must enter the Patient ID. If the entered Patient ID matches an existing Patient ID then you will be prompted regarding updating the existing information.

Next enter the First Name, Middle Name (optional), Last Name, Birth Date, Gender, and Religion (optional) for the Patient.

When ready click Next to go to enter the Encounter Information page of the wizard.

Before proceeding you must enter the Encounter Number. If the entered Encounter Number matches an existing Encounter Number then you will be prompted regarding updating the existing information.

Then select the Unit and enter the Room/Bed (optional) for the Patient. The Admit Date & Time will automatically populate to the current Date & Time, however you may choose to change this. You may also choose to enter a Discharge Date & Time if appropriate.

When ready click Next to go the Admission Type and Code Selection page of the wizard. You may optionally enter a Visit Number here. You will also need to select an Admission Code, Patient Type, and Patient Service.

When ready click Next to go to the Instrument Selection page of the wizard. Select the appropriate Instrument for the Patient and click Finish when ready. This will return you to the Patient Workload page. If you have selected the current Unit and the current Date for the new Patient then they will be displayed on the Patient Workload page. However, if you have selected different parameters you may need to change the Unit, Date, &/or Shift to find the newly admitted Patient.

2Discharge

The Discharge ADT Function can be used to end a Patient's Encounter. This correlates to the HL7 A03 function, for more information on HL7 functions please see the **Infor Care Workloads HL7 Guide**. To open the Discharge function click on **ADT Functions » Discharge**.

This will open the Discharge Patient page.

By default the Discharge Date & Time will be set to the current Date & Time. You may change this if the Patient was previously discharged or if they will be discharged in the future. Click Save to perform the action and return to the Patient Workload page. The Patient will remain on the Patient Workload page until the end of the Shift which contains the selected Discharge Date & Time.

3Transfer

The Transfer ADT Function can be used to move a Patient's Encounter from the current Unit to another Unit. This correlates to the HL7 A02, A09 & A10 functions, for more information on HL7 functions please see the **Infor Care Workloads HL7 Guide**. To open the Transfer function click on **ADT Functions » Transfer**. This will open the Transfer Patient page.

Select the appropriate Unit, Room/Bed (optional), and Transfer-Out Date & Time. Select the Keep Patient Active on Current Unit if you want the Patient to be listed under both the current Unit and the new Unit. This is often used in situations such as when a Patient is transferred to X-Ray and is expected to return to the current Unit prior to the end of the current Shift.

Click Save to perform the action and return to the Patient Workload page. The Patient will remain on the current Patient Workload page until the end of the Shift which contains the selected Transfer-Out Date & Time. The Patient will be listed on the Patient Workload page for the new Unit starting on the Shift which contains the Transfer-Out Date & Time.

4Swap Beds

The Swap Beds ADT Function can be used as a double transfer to move one Patient's Encounter into the Room/Bed of an existing Patient and also to move the second Patient into the first Patient Encounter's Room/Bed. This correlates to the HL7 A17 function, for more information on HL7 functions please see the **Infor Care Workloads HL7 Guide**. To open the Swap Beds function click on **ADT Functions » Swap Beds**. This will open the Swap Beds page.

Select the Secondary Patient to participate in the bed swap as well as the Date & Time for the bed swap. Click Save to perform the action and return to the Patient Workload page. Each Patient will remain on the current Patient Workload page in the current Room/Bed until the end of the Shift which contains the selected Swap Beds Date & Time. The Patients will be listed on the Patient Workload page in the new Room/Bed starting on the Shift which contains the Swap Beds Date & Time.

5Sign-Out / Sign-In

The Sign-Out / Sign-In ADT Function can be used to place a Patient on a Leave-of-Absence. This is sometimes used on Mental Health or Long Term Care Units where Patients are allowed to leave the hospital with family members. This correlates to the HL7 A21 & A22 functions, for more information on HL7 functions please see the **Infor Care Workloads HL7 Guide**. To open the Sign-Out function click on **ADT Functions » Sign-Out**. This will open the Sign-Out Patient page.

The Sign-Out Date & Time will be automatically populated with the current Date & Time, however this may be modified as needed.

When ready click Save to perform the action and return to the Patient Workload page. The Patient Workload page will now display a gray dot for this Patient. To Sign the Patient back in click the down arrow expand the Actions for that Patient and go to **ADT Functions → Sign-In** or simply click the gray dot. This will open the Sign-In Patient page.

You may change the Sign-In Date & Time as needed. When ready click Save to perform the action and return to the Patient Workload page. The Patient Workload page will no longer display the gray dot for this Patient

6Merge Patients

The Merge Patients ADT Function may be necessary when a Patient is accidentally added to the system because the Hospital Patient ID was entered incorrectly or the Patient's name was misspelled. This correlates to the HL7 A18, A34, A36, & A40 functions, for more information on HL7 functions please see the **Infor Care Workloads HL7 Guide**. To open the Merge Patients function click on **ADT Functions » Merge Patients**. This will open the Merge Patients page.

Select the Secondary Patient to participate in the merge. Click Save to perform the action and return to the Patient Workload page. The update will be immediately reflected including all historical records. If the Encounter Numbers do not match then multiple records may still exist under the unique Encounter Numbers. If the Encounter Numbers do match then the Encounters will be merged as well. The same applies for Locations and Instruments. If the same Instrument is attached and both Instruments have workload collected then the Primary Instrument will be maintained and the Secondary Instrument will be abandoned.

7Merge Encounters

The Merge Encounters ADT Function may be necessary when a Patient's Encounter is accidentally added to the system because the Hospital Patient ID was entered incorrectly or the Patient's name was misspelled. This correlates to the HL7 A35 & A41 functions, for more information on HL7 functions please see the **Infor Care Workloads HL7 Guide**. To open the Merge Encounters function click on **ADT Functions » Merge Encounters**.

This will open the Merge Encounters page.

Select the Secondary Encounter to participate in the merge. Click Save to perform the action and return to the Patient Workload page. The update will be immediately reflected including all historical records. If the Locations do not match then multiple records may still exist under the unique Locations. The same applies for Instruments. If the same Instrument is attached and both Instruments have workload collected then the Primary Instrument will be maintained and the Secondary Instrument will be abandoned.

8Cancel Admit

The Cancel Admit ADT Function may be necessary when a Patient is accidentally admitted. This correlates to the HL7 A11 function, for more information on HL7 functions please see the **Infor Care Workloads HL7 Guide**. To open the Cancel Admit function click on **ADT Functions » Cancel » Admit**. This will open the Cancel Admit page.

Click Save to perform the action and return to the Patient Workload page. The update will be immediately reflected including all historical records.

9Cancel Discharge

The Cancel Discharge ADT Function may be necessary when a Patient is accidentally discharged or the discharge is processed too hastily and the Patient's condition changes. This correlates to the HL7 A13 function, for more information on HL7 functions please see the **Infor Care Workloads HL7**

Guide. To open the Cancel Discharge function click on **ADT Functions » Cancel » Discharge**. This will open the Cancel Discharge page.

Click Save to perform the action and return to the Patient Workload page. The update will be immediately reflected including all historical records.

10Cancel Transfer

The Cancel Transfer ADT Function may be necessary when a Patient is accidentally transferred. This correlates to the HL7 A12 function, for more information on HL7 functions please see the **Infor Care Workloads HL7 Guide**. To open the Cancel Transfer function click on **ADT Functions » Cancel » Transfer**. This will open the Cancel Transfer page.

Click Save to perform the action and return to the Patient Workload page. The update will be immediately reflected including all historical records.

Non-Patient Workload

Non-Patient Workload consists of Instruments with Interventions that capture work performed during the Shift that is not related to Patients. These are most frequently variable items such as:

- Phone Calls
- Special Projects
- Staff Meetings

that cannot be predicted as part of Indirect Workload. Non-Patient Workload is displayed in Staffing and is used to calculate Staffing according to the GRASP® Methodology.

You can select the applicable Unit, Date & Shift for the Non-Patient Workload data that you wish to view under the navigation bar. For information on how to make these selections refer to the **Parameter Selection** section. To access the Non-Patient Workload Actions for a selected Instrument click the down arrow. When the Non-Patient Workload Actions menu is open you may minimize it by clicking the up arrow.

Score

To Score Non-Patient Workload you can either click the Score link or simply double-click the row for the Instrument. This will pop-in the Score Non-Patient Workload page.

The process of scoring Non-Patient Workload is exactly the same as scoring Patient Workload. Please refer to that section for details on this process.

Delete

The Delete Action for a Non-Patient Workload Instrument will only be available when the selected Date & Shift match the Instrument's scored Date & Shift. When Delete is clicked a page will pop-in to the current page requesting confirmation of the action.

Click the Delete button to complete the Action or click the Cancel button to cancel the Action.

Indirect Workload

Indirect Workload consists of Interventions that support the care of the patient population, but are not directly applied to an individual patient. Indirect Workload varies by Day-of-Week as well as by Shift. This is a read-only view to show what Interventions are considered to be Indirect as well as to show the values that have been associated with those Interventions.

You can select the applicable Unit, Date & Shift for the Indirect Workload data that you wish to view under the navigation bar. For information on how to make these selections refer to the **Parameters Selection** section.

Above the Indirect Workload table you will see several values that have been set by your Administrator including:

- Census
- Days Per Week
- Variable Minutes (or Tenths of an Hour) Per Patient Per Day

The Census and Days Per Week are used to calculate the Indirect Workload values. The Variable Minutes (or Tenths of an Hour) Per Patient Per Day is calculated from the Indirect Workload table. The Variable Minutes (or Tenths of an Hour) Per Patient Per Day is further divided according Shift Percentages and applied to each Patient that is scored.

In the header of the table as well for each header within the table (bold rows) you will find total values for each of the value columns such as Standard Time and Minutes Per Day. In the Shift columns you will also see the percentage applied to the Shift.

Click the  (Information) icon to view the description of the individual Indirect Workload Intervention.

Indirect Workload Interventions may be Variable or Constant. Variable Interventions depend upon the Patient Census and the total value of the Indirect Workload will vary. Constant Interventions are independent of the Patient Census and only vary according to the Day-of-Week and Shift. Again, this is a read-only view to show what Interventions are considered to be Indirect as well as to show the values that have been associated with those Interventions.

Questionnaires

Questionnaires are used primarily during the Pilot or testing period for an Instrument to determine if the Instrument meets the needs of the Staff. It is very important that the Staff fill out the Questionnaires completely for EACH Shift during the Pilot period. Questionnaires may also be used at other times to help determine if the level of Staffing is appropriate when compared to the Workload. Questionnaires are an important part of the GRASP® Methodology. For more information on the GRASP® Methodology please refer to the **Infor Care Workloads Administrator Guide**.

You can select the applicable Unit, Date & Shift for the Questionnaire that you wish to view under the navigation bar. For information on how to make these selections refer to the **Parameters Selection** section.

You may also change the selected Questionnaire as more than one may exist. To change the selected Questionnaire click on the current Questionnaire name to show a list of the available

Questionnaires. Click on the desired Questionnaire and the page will refresh with information for the selected Questionnaire. Your Administrator may set the Questionnaire to be completed by you as an individual or as a team. You will need to request this information from your Administrator.

Questionnaires are completed anonymously. If you are filling out a Questionnaire as a team, other team members will see the answers that you entered but they will not see that you entered those answers. However, your Administrator will be able to see who answered which questions by running a Report. Please refer to the **Reports** section for more information.

Each Questionnaire consists of three (3) sections:

- Ranked Questions
- Free Text Questions
- Staffing

You should complete each section in order from top to bottom as required. If the Questionnaire has not been completed the incomplete section(s) will be highlighted in red and a note at the top of the screen will provide direction as to the task(s) necessary to complete the Questionnaire.

When the Questionnaire has been completed all three (3) headers will be displayed in green and a note at the top of the screen will indicate that “The results of this Questionnaire are valid”.

Questionnaires are intended to be completed during the current Shift. You may NEVER complete a Questionnaire for a Shift that occurs in the future. Your Administrator may also limit the number of Past Shifts that you may go back to complete a Questionnaire. When either of these conditions are met the selected Questionnaire will be displayed in Read-Only mode and a note will be displayed at the top of the screen.

Ranked Questions

Ranked Questions are used to get an overall picture of the level of Workload on the Shift. The questions generally align with the Elements defined in the Instrument. For more information on Instruments and Elements please refer to the **Infor Care Workloads Administrator Guide**.

Ranked Questions allow you to select one of five (5) choices:

- Inadequate / Work Left Undone
- Barely Adequate / Minimally Acceptable
- Adequate / Acceptable
- More Than Adequate / Time To Spare
- N/A (Not Applicable)

Select the appropriate answer by checking the box in that column. You may save your answer by clicking the  (save) icon for an individual row. Or by clicking the Save button at the bottom of the list of questions to save all answers at once.

You may clear an answer by clicking the  (clear) icon for an individual row. You may clear all answers by clicking the Clear Values button at the bottom of the section.

If any of the Ranked Questions are answered as “Inadequate / Work Left Undone” or “Barely Adequate / Minimally Acceptable” then you will be required to answer at least one (1) Free Text Question to provide an explanation as to why the Staffing was less than “Adequate / Acceptable”.

If any of the Ranked Questions are answered as “Inadequate / Work Left Undone”, “Barely Adequate / Minimally Acceptable” or “More Than Adequate / Time To Spare” then you will be required to fully complete the Staffing section of the Questionnaire to show what changes to Staffing would have enabled the Workload to be “Adequate / Acceptable”.

Free Text Questions

Free Text Questions allow you to explain why the level of Staffing was not “Adequate / Acceptable”. You are not required to complete this section unless at least one Ranked Question is answered as “Inadequate / Work Left Undone” or “Barely Adequate / Minimally Acceptable”.

Enter your answer by typing into the textbox. When one (1) question is complete you may click the  (save) icon to save your answer. You may also continue answering questions and save all answers by clicking the Save button at the bottom of the section.

You may clear an answer by clicking the  (clear) icon. You may clear all answers by clicking the Clear Values button at the bottom of the section.

Staffing

Staffing allows you to show what changes to Staffing would have enabled the Workload to be Adequate / Acceptable. You are not required to complete this section unless at least one (1) Ranked Question is answered as “Inadequate / Work Left Undone”, “Barely Adequate / Minimally Acceptable” or “More Than Adequate / Time To Spare”.

Enter Actual Hours or +/- Hours by typing a numerical value into the appropriate textbox. When one (1) “Skill” is complete you may click the  (save) icon to save your answer. You may also continue filling in values and save all by clicking the Save button at the bottom of the section.

You may clear an answer by clicking the  (clear) icon. You may clear all answers by clicking the Clear Values button at the bottom of the section.

If all Ranked Questions are answered Adequate / Acceptable then the +/- column of Staffing will not be applicable. This column will be displayed as Read-Only and any values entered into this column will not be used to calculate the Total Assessed Hours. However, you may still enter values in the Actual Hours column as needed.

Your Administrator may choose to have the “Actual Hours” populated automatically based on the values displayed in Staffing. If so you may see values entered into this field even though you did not enter these values. Please refer to the **Staffing** section for more information.

If Ranked Questions were answered as “More Than Adequate / Time To Spare” then the +/- Hours is expected to be negative because you have indicated that the Shift Staffing was more than Adequate. If the values entered into the +/- Hours column are not negative they will highlighted in blue.

If Ranked Questions were answered as “Inadequate / Work Left Undone” or “Barely Adequate / Minimally Acceptable” then the +/- Hours is expected to be positive because you have indicated that

the Shift Staffing was less than Adequate. If the values entered into the +/- Hours column are not positive they will be highlighted in blue.

Staffing

Staffing provides a summary of “Group” and “Skill” data disseminated from the entered Workload data and processed according to the GRASP® Methodology. Staffing data is broken down first by “Group” and then by “Skill”. The “Group” data relates closely to the total values entered in Workload. The “Skill” data is calculated using the “Group” data in conjunction with the “Standards” established by the Administrator. For more information on the GRASP® Methodology please refer to the **Infor Care Workloads Administrator Guide**.

You can select the applicable Unit, Date & Shift for the Staffing data that you wish to view under the navigation bar. For information on how to make these selections refer to the **Parameters Selection** section.

Above the Staffing table you will see several calculated values including:

- Actual Hours per Patient per Day (HPPD)
- Budgeted HPPD
- Required HPPD
- Utilization
- Occupancy

These calculated values provide a quick overview of the status of Staffing on the Shift.

Group Staffing

The top table in Staffing displays the Group Staffing. Click the  (Information) icon to view the standards set by the Administrator for a particular “Group”.

If Shared Instruments are available in the selected Unit then Instrument Unit & Shift will be displayed along with the Group Name.

Shared Groups are displayed in an alternate color such as blue. The Required Hours and Census for the Shared Groups are included in the Total data row at the bottom of the table. However, these values are NOT included in the Unit Total and are NOT used in calculating the Skill Staffing. The Shared data is reported back to the Instrument Unit and is used to calculate Skill Staffing in that Unit.

Your Administrator may allow you to update the data in the Required Hours and Census fields. This might be done when Workload is being collected Prospectively, to predict the care required, when the Admit-Discharge-Transfer (ADT) System does not populate the Patient List until patients are actually admitted. To enter a value simply click in the appropriate Textbox and type the numerical value then click the Save button. The screen will briefly turn gray while the data is updated. When a value has been entered the Last Modified Date and Last Modified By fields will be populated indicating who & when the data was entered.

Required Hours and Census values that do not display a value in the Last Modified Date and Last Modified By fields have been calculated from Workload. To remove a manually entered value you can either click in the Textbox and press the Delete key or click the  (Clear Values) icon to clear all of the values.

You may also enter values for all rows and then click the Save button below the table to save data one time for all rows. Likewise to clear data from all rows you may click the Clear Values button below the table.

Non-Patient Workload

Non-Patient Workload consists of Interventions that are not directly linked to Patients but require the Caregivers' time. An example of this type of Intervention is taking Telephone Calls. Non-Patient Workload is entered in the Non-Patient Workload Workspace and is displayed in Staffing under the Group Non-Patient Workload. The values displayed here are used in Skill Staffing to calculate the Required Hours for each Skill. For more information on Non-Patient Workload please refer that section.

Indirect Constant

Indirect Workload consists of Interventions that support the care of the patient population, but are not directly applied to an individual patient. Some of these Interventions are considered to be "Constant" meaning that they do not vary based on the Patient Census. The Indirect Constant group displays the value from Indirect Workload that has been marked as Constant. The value displayed here is used in the Skill Staffing to calculate the Required Hours for each Skill. For more information on Indirect Workload please refer to that section.

Skill Staffing

The lower table displays the Skill Staffing. Click the  (Information) icon to view the standards set by the Administrator for a particular Skill.

The  (Key) icon indicates that the Skill is an Infor Skill or that this Skill is Unit Producing. For more information on what this means please refer to the **Infor Care Workloads Administrator Guide**. The Infor Total at the bottom of the table is a summary of these values.

The Required Staff and Required Hours values are calculated from the information presented in the Group Staffing table following the Standards of the GRASP® Methodology. For more information please refer to the **Infor Care Workloads Administrator Guide**.

The Actual Hours values may be populated in one of three (3) ways:

- Manually entered on this page
- Standard Hours entered by the Administrator
- Imported from Scheduling, Staffing, or Payroll system

Your Administrator may allow you to update the data in the Actual Hours field. To enter a value click in the Textbox and type the numerical value then click the Save button. The screen will briefly turn gray while the data is updated. When a value has been entered the Last Modified Date and Last Modified By fields will be populated indicating who & when the data was entered.

To remove a manually entered value you can either click in the Textbox and press the Delete key or click the  (Delete) icon to clear all of the values.

You may also enter values for all rows and then click the Save button below the table to save data one time for all rows. Likewise to clear data from all rows you may click the Clear Values button below the table. Actual Hours values that do not display a value in the Last Modified Date and Last Modified By fields have been entered by the Administrator as Standard Hours.

Actual Hours values that are imported from a Scheduling, Staffing, or Payroll system will display in a similar manner to manually entered values. However, the Last Modified By user will often be listed as Administrator or another administrative user.

The Variance is the difference between the Actual Hours and the Required Hours. If the value is greater than zero (0) it will be displayed in green indicating that you have adequate Staffing for this Skill. If the value is less than zero (0) it will be displayed in red indicating that you have inadequate Staffing for this Skill. The Infor Total and Total rows at the bottom of the table also follow this logic indicating if you have adequate overall Staffing.

Your Administrator may choose to display the Budget and Actual Cost values. If so these values can help you to understand how much each Skill is budgeted for on the selected Shift as well as the cost for each Skill on the selected Shift.

Reports

Reports provide the ability to view and print current and historical data. Infor Care Workloads includes a number of built-in Reports that allow for data analysis according to the GRASP® Methodology.

The following tables list the built-in Infor Care Workloads Reports and provide a description of each report:

Staffing Reports		
Num.	Name	Description
110	Daily Staffing	Daily Staffing information as seen on the Staffing screen including a breakdown by Group & Skill for each Shift. Can be used in a Prospective setting to determine if planned Staffing requires adjustments on a particular Unit(s).
120	Daily Utilization	Daily breakdown by Unit & Shift of the Census, Required & Actual Hours, as well as Variance, Utilization, & Transfer Staff (Number needed or available). Can be used in a Prospective setting to determine if planned Staffing requires reallocation of Staff to different Unit(s).

130	Staffing Summary	Summarized Staffing information similar to that seen on the Staffing screen & the "Daily Staffing" Report including a breakdown by Group & Skill for each Shift over a period of time. Can be used to review whether a Unit(s) has an appropriate Skill Mix &/or Patient:Staff Ratio.
131	Shift Detail by Day of Month	Daily breakdown of the Census, Required & Actual Hours, as well as HPPDs, Variance, Utilization, & Transfer Staff (Number needed or available) typically run for a full month to show trending by Day-of-Month.
132	Shift Detail by Day of Week	Daily breakdown of the Census, Required & Actual Hours, as well as HPPDs, Variance, Utilization, & Transfer Staff (Number needed or available) to show trending by Day-of-Week.
133	Hours over Time	Displays a line graph of the Required, Budgeted, and Actual Hours over a period of time.
134	Hours by Day-of-Week	Displays a bar graph of Required, Budgeted and Actual Hours by Day-of-Week.
135	HPPDs over Time	Displays a line graph of the Required, Budgeted, and Actual Hours per Patient per Day over a period of time.
136	HPPDs by Day-of-Week	Displays a bar graph of Required, Budgeted and Actual Hours per Patient per Day by Day-of-Week.
137	Staffing over Time	Displays a line graph of each Skill's Required and Actual Hours over a period of Time.

Workload Reports

Num.	Name	Description
210	Patient Totals	Daily breakdown by Unit, Shift, & Instrument of the Required Workload for each Patient.
212	Patient Workload History	Complete listing of all Workload scored on a Patient including IRMs.
213	Workload History	Displays a line graph of the Workload for selected Patient(s) over a period of time.
222	Workload by Patient and Caregiver for Assignments	List of Caregivers with their respective Patient assignments and corresponding Workload including Percentage of Workload for the Shift. Can be used to ensure that Staffing assignments are equitable.
224	Continuity of Care	List of Patients with their respective Caregivers over a period of time.
226	Workload by Caregiver	List of Caregivers with Total Hours of Care and Census as assigned.

228	Workload by Provider	Collation of Required Hours and Census by Instrument for individual Providers (as scored).
230	Patient Intervention Detail	Displays those Interventions that were selected for each Patient by Date and Shift including individual Intervention Workload Values and the overall Workload Value.
231	Patients with Selected Interventions	Displays the Count and Total Workload Value for selected Interventions across Instruments including the Patients scored.
232	Intervention Workload over Time	Displays a line graph of the Workload for selected Interventions over a period of time. Each data point also shows the selected Count for the Intervention on that date.
240	Patients Out on Pass	Lists the Signed-Out/In Date & Time for Patients that have been out on pass including the duration of time that they were gone.
250	Missing Workload	Shows Patients that did not get Workload Scored for a particular Shift. Highlights those Patients that have a Workload Value applied from a previous Shift counting towards the Total Workload Value.
251	Compliance	Displays Compliance as Census (# of Patients Scored) divided by Patient Count along with Utilization and IRM information. Results can be returned as Daily Details, an Executive Summary, or a Unit Trend of data summed Monthly.
252	Compliance by Unit	Displays a bar graph of the Compliance as Census (# of Patients Scored) divided by Patient Count for the selected Units.
253	Compliance over Time	Displays a line graph of the Compliance as Census (# of Patients Scored) divided by Patient Count for a period of time. This report includes the Average value and $-3 * \text{Standard Deviation}$. Any values exceeding the Standard Deviation should be investigated.

Management Reports

Num.	Name	Description
310	Weekly Utilization	Shows a Weekly view of Census, Required & Actual Hours, Variance, Utilization (Required Hours / Actual Hours), and HPPDs for all Shifts.
311	Utilization by Unit	Displays a bar graph of the Utilization for the selected Units.
312	Utilization over Time	Displays a line graph of Utilization over a period of time including the Average and $\pm 3 * \text{Standard Deviation}$. Any values exceeding the Standard Deviations should be investigated.
313	Utilization by Day-of-Week	Displays a bar graph of Utilization by Day-of-Week.
315	Care Potentially	Shows a Weekly view of Census, Required & Actual Hours, Variance,

	Delivered	Potential Care (Actual Hours / Required Hours) and HPPDs for all Shifts.
320	Cumulative Intervention	Lists each Instrument's Interventions showing the individual Workload Value along with the count of Patients, Total Workload Value, Percent of Patients, & Percent of Workload for that Intervention. Can be used to identify Interventions that are rarely used and can be eliminated as well as to identify the impact and cost of proposed process improvements.
321	Cumulative Intervention Unit Trend	Lists the monthly Percent of Patients and Percent of Workload data from the Cumulative Intervention Report to identify trends in Intervention usage.
330	MIS Code Totals	Summarizes the Patient Care Required Hours including Statistics into MIS Categories as required by the Canadian Ministry of Health.
340	VANUC	VANUC (Volume, Actual Staffing, Nursing Workload, Utilization, Costs) displays Actual & Budgeted Patient Days, Actual, Required, & Budgeted Hours, Actual, Required, & Budgeted HPPDs along with Actual & Budgeted FTEs, Actual & Budgeted Cost, and IRM information. Can be run as an Executive Summary or as a Trend Report showing changes over a period of time by Month.
341	Variance over Time	Displays a line graph of Variance over a period of time including the Average and +/- 3 * Standard Deviation. Any values exceeding the Standard Deviations should be investigated.
350	Test "Pilot" Weekly Utilization	Shows a Weekly view of Census, Required, Actual & Assessed Hours, and Infor Utilization (Required Hours / Actual Hours) and Assessed Utilization (Assessed Hours / Actual Hours) for all Shifts as well as HPPDs as recorded during the "Pilot" for the Instrument.
355	Test "Pilot" Analysis	Summarizes the data from the Instrument "Pilot" to aide in the refinement process.
356	Questionnaire Detail	Summarizes Staffing Adequacy Questionnaire data to aide in the refinement process.
360	Downtime Workload Form	Provides a printed copy of the Instrument in the event that Infor Care Workloads is not available.
370	Unit Reference Manual	Provides a printed copy of the Unit Reference Manual including all information about the Unit setup and detailed analysis of the Instrument including Clinical & Infor math definitions for each Intervention including Normal Time and Frequency.
380	Indirect Analysis	Provides a printed copy of the Indirect Care Worksheet.
390	Instrument Definition	Provides a printed copy of the Instrument Interventions and how they were defined.

Quality Reports		
Num.	Name	Description
410	IRM Totals	Displays detailed Interrater Reliability Monitor (IRM) data indicating if each Unit met the threshold for Percent Agreement. The IRM score is calculated as (Total Number of Agreements) / (Total Number of Agreements + Disagreements).
420	IRM Totals By Provider	Displays detailed IRM data indicating if education on the Instrument is needed for an individual Provider.
430	IRM Totals By Rater & Provider	Displays detailed IRM data indicating if there is a significant difference between the Rater and Provider or between different Raters indicating where education is needed.
431	IRM Reasons for Review	Provides a printed copy of the completed IRM showing the reasons for review allowing the Rater to discuss the IRM with the Provider and determine if more education &/or review is necessary.
435	IRM Item Analysis	Displays a detailed analysis of each Workload Intervention and the number of IRM Agreements and Disagreements with the reason for the Disagreement. Can help to identify if specific Interventions &/or Disagreement Reasons are contributing disproportionately to inadequate IRM Scores.
440	PCD Totals	Displays detailed Percent of Care Delivered (PCD) data by Unit & Patient providing data as to the accuracy of the documentation. The PCD Score is calculated by adding together the Percents for each Intervention and Dividing by the Number of Interventions Scored.
441	PCD Item Analysis	Displays a detailed analysis of each Workload Intervention and the number of PCD Disagreements with the Reason for the Disagreement. Can help to identify if specific Interventions &/or Disagreement Reasons are contributing disproportionately to inadequate PCD Scores.
450	Quality	Displays detailed data for analysis of Quality Outcomes in comparison with Actual & Required HPPD and Utilization.
451	Patient Quality	Displays detailed data for analysis of Patient Quality Outcomes in comparison with Actual & Required HPPDs, Utilization, Workload Value, and IRM Value.
461	Quality Unit Trend	Displays Monthly detailed data for trending purposes and analysis of Quality Outcomes in comparison with Actual & Required HPPDs and Utilization.
462	Quality Executive Summary	Summarizes Quality data for a time period sub-totaled by Division for analysis of Quality Outcomes in comparison with Actual & Required HPPDs and Utilization.
490	Export National	Provides data to for submission to the Infor National Database.

 Database

Statistical Reports

Num.	Name	Description
510	Active Carryover	Displays New Referrals, Active Carryovers, and Active Service Recipients in compliance with Canadian MIS guidelines. Results can be returned as Monthly Details, Monthly Statistics, or Quarterly Statistics.
520	ADT over Time	Displays a stacked bar graph of of Admissions, Discharges, Transfers In, and Transfer Out over Time.
521	ADT by Day-of-Week	Displays a bar graph of of Admissions, Discharges, Transfers In, and Transfer Out by Day-of-Week for a period of time.
522	ADT by Hour-of-Day	Displays a bar graph of of Admissions, Discharges, Transfers In, and Transfer Out by Hour-of-Day for a period of time.

Administrative Reports

Num	Name	Description
.		
800	System Options	Lists all System Options.
810	User Management	Displays detailed User Information optionally including Security settings.
820	Security Profiles	Displays Security Profiles by Category and Class.
850	Program Definition	Displays Program information.

To run a Report click on the Report Name.

Infor Care Workloads utilizes a Data Warehouse to store and organize data for quick access. The Data Warehouse is populated on a regular schedule, typically once per day. The Data Warehouse may not include data entered on the current date. For those Reports that may require data entered on the current date an option exists to run the Report against the Transactional Database. It is generally recommend to run the Reports against the Data Warehouse whenever possible as these Reports will generate much more quickly than those run against the Transactional Database.

To change which database is used to generate the reports select the appropriate option from to drop down list. A note will be displayed below the selection indicating the effects of the current selection.

Some Reports also provide the option to run the Report organized by Unit or Program. To change this select the appropriate option from the drop down list. The Report Viewer page will display a list of parameters for the selected Report.

Each Parameter drop down list is populated based on the previously selected value(s). When selecting Parameters the page will perform a post-back to the server to populate the next Parameter. After making a selection it is recommended to click in the whitespace between Parameters before clicking the next Parameter to give Infor Care Workloads the opportunity to refresh data for the next Parameter. Once the appropriate Parameter selections have been made, click View Report.

Infor Care Workloads will store the selected parameters to expedite running future Reports. The next time that a Report is run all but the last Parameter will be automatically populated based on your previous selections. The last Parameter is not selected so that the Report is not automatically run when it is opened allowing you to review the selections. If you need to change a Parameter simply make the change and then click View Report again to refresh the Report data.

When a Report is viewed the following Toolbar will display below the Parameters.

This Toolbar can be used to:

- Change Page (if the Report has more than one Page)
- Change Zoom Level
- Find Text
- Export
- Refresh
- Print

If the Report has more than one Page use the Previous & Next icons to navigate the Pages. Note that the Report's pages will not align with the Printed pages as that is dependent on the individual printer. To change the Zoom Level click on the drop-down list and select the appropriate option.

To find text type the text into the box and click Find. If the text is not on the Report a dialog box will indicate this.

To export select the format and click Export. You will be prompted to Open or Save the file, click the appropriate button. If you choose to Save the file, select an appropriate location to save the file. To Refresh the data on the Report you can either re-click the "View Report" button or click the Refresh button. To print the report, click the Print button. This will open the "Print" dialog. Make the appropriate Printer selection and click "OK" to print the Report.

Note that the Print button may have been hidden by the Administrator. This functionality utilizes an Active-X control that may not be allowed to run by your I.T. department.

Scheduled Reports

Any Infor Care Workloads report may be scheduled to run on a repeated or one time basis. This may be very useful for reports that are run on a daily basis or large reports that require an extended amount of time to run. Scheduled reports can be output to a File Share or sent to users via E-Mail.

To schedule a report click the  (Schedule Report) icon on the right-hand side of the report list.

Or click the  (Schedule Report) icon in the top right hand corner of the report itself. This will open the Schedule Report page for the selected report

To access the list of currently Scheduled Reports click on Reports → Schedule Reports. This will open the list of currently Scheduled Reports. Note that the list of Scheduled Reports will include reports that have been scheduled by all users. Use caution when updating or deleting a Scheduled Report as the owner of the report may be using it for specific purposes.

To Update an existing Scheduled Report click on the  (update) icon. This will open the “Schedule Report” page for the selected report.

To remove an existing Schedule Report click on the ✕ (delete) icon. You will be prompted to confirm the action. Click “OK” to delete the Scheduled Report.

Add / Update Scheduled Report

Each Scheduled Report contains a Description that should be used to help uniquely identify the purpose of the report. If you have access to modify Scheduled Reports you will be able to modify reports that have been scheduled by all users. Use caution when modifying a Scheduled Report as the owner of the report may be using it for specific purposes.

Report Delivery Options

Scheduled Reports can be delivered to users via E-mail or can be saved to a Windows File Share. After selecting the appropriate Delivery type fill in the fields with the appropriate information.

E-Mail

Reports delivered via E-Mail require at least one recipient E-Mail address in the To field. The Cc and Bcc fields are both optional. More than one (1) address may be included in any of these fields by separating the addresses with a semi-colon (;).

The Reply-To field is optional and allows the E-Mail to appear to be from a user other than the System Administrator.

The Subject will be pre-filled with: @ReportName was executed at @ExecutionTime

The names “@ReportName” and “@ExecutionTime” are reserved keyword variables. “@ReportName” will automatically include the name of the report, while “@ExecutionTime” will automatically include the time that the report was executed.

Several formats are available for the Scheduled Reports.

Format Name	Description
XML file with report data	An Extensible Markup Language file commonly used to move data between disparate databases.
CSV (comma delimited)	A Comma Delimited file commonly used to move data between disparate databases.
TIFF file	An image file.
Acrobat (PDF) file	A Portable Document Format file commonly used to provide a

	printer friendly read-only view of the data.
Web Archive	An HTML file.
Excel	A Microsoft Excel file.

The Priority is the priority of the E-Mail to be sent, options include Normal, Low, & High. A High priority E-Mail may be seen as urgent by the recipient. The Comment is an additional, optional field that can be used to describe the Scheduled Report to other users.

2Windows File Share

Reports saved to a Windows File Share can be accessed by users with permission to that File Share. For more information please contact the local System Administrator.

The File Name is the name of the file to be saved. The UNC Path is the address of a File Share that can be used to save files. For more information on this please contact your local System Administrator.

Several formats are available for the Scheduled Reports.

Format Name	Description
XML file with report data	An Extensible Markup Language file commonly used to move data between disparate databases.
CSV (comma delimited)	A Comma Delimited file commonly used to move data between disparate databases.
TIFF file	An image file.
Acrobat (PDF) file	A Portable Document Format file commonly used to provide a printer friendly read-only view of the data.
Web page for IE 5.0 or later (.htm)	An HTML file designed specifically for users of Internet Explorer 5.0 or later.
Web page for most web browsers (.htm)	An HTML file designed to be rendered in most web browsers.
Web Archive	An HTML file.
Excel	A Microsoft Excel file.

The “Credentials used to access the file share” is the Active Directory login that the report will be saved by. This user must have Read & Write access to the “UNC Path”. For more information on this please contact your local System Administrator.

The “Overwrite options” include:

Option Name	Description
Overwrite an existing file with a newer version	Simply overwrites existing files. Use this option if the data in the report is only useful for a limited period of time.

Do not overwrite the file if a previous version exists	Report will not be saved if a file with the same name exists.
Increment file names as newer versions are added	Adds “_#” to the end of the file name creating a new file each time the Scheduled Report is run.

Subscription Processing Options

The Subscription Processing Options can be used to determine how frequently the Scheduled Report is run. A Scheduled Report can be run just once or it can be repeated by Hour, Day, Week, or Month.

The Start Time is used by all of the options as the time at which the report is run. Optionally the date for Stop this schedule... can be used to set an end date for the Scheduled Report.

- Scheduling a report to run by Hour provides a simple interval option of hour(s) and minute(s).
- Scheduling a report to run by Day provides the flexibility to run the report on specific days of the week, each weekday, or on a recurring schedule based on the number of days between each run of the report.
- Scheduling the report to run by Week allows the user to choose the days of the week and the number of weeks between each run of the report.
- Scheduling the report to run by Month allows the user to select the months that the report will run plus the week of the month & days of the week or the calendar days to run the report.

Report Parameter Values

If you have previously run the selected report the selected parameters will be automatically populated in this section. If not, you will have to manually select all of the parameters.

The parameters will vary by report. Some parameters are dependent upon the selection of the previous parameter. After all settings are complete click the “Save” button to save the data and schedule the report.

IDate Parameter Values

The Date values provide an option to Use Default Value. Checking this option will run the report for the previous day, week, or month as specified in the report. The following table lists each report and its associated Default Date values:

Num.	Report Name	Default Start Date	Default Stop Date
110	Daily Staffing	Today - 1	Today - 1
110	Daily Staffing (Transactional)	Today	Today
120	Daily Utilization	Today - 1	Today - 1
120	Daily Utilization (Transactional)	Today	Today
130	Staffing Summary	Today - 8	Today - 1
130	Staffing Summary (Transactional)	Today	Today

131	Shift Detail by Day of Month	1st Day of Previous Month	Last Day of Previous Month
132	Shift Detail by Day of Week	1st Day of Previous Month	Last Day of Previous Month
210	Patient Totals	Today - 1	Today - 1
212	Patient Workload History	Today - 8	Today - 1
212	Patient Workload History (Transactional)	Today	Today
222	Workload by Patient and Caregiver for Assignments	Today - 1	Today - 1
224	Continuity of Care	Today - 8	Today - 1
226	Workload by Caregiver	Today - 8	Today - 1
228	Workload by Provider	Today - 8	Today - 1
230	Patient Intervention Detail	Today - 1	Today - 1
230	Patient Intervention Detail (Transactional)	Today	Today
231	Patients with Selected Interventions	Today - 8	Today - 1
231	Patients with Selected Interventions (Transactional)	Today	Today
240	Patients Out on Pass	Today - 8	Today - 1
240	Patients Out on Pass (Transactional)	Today	Today
250	Missing Workload	Today - 8	Today - 1
250	Missing Workload (Transactional)	Today	Today
310	Weekly Utilization	1st Day of Previous Week	Last Day of Previous Week
315	Care Potentially Delivered	1st Day of Previous Week	Last Day of Previous Week
320	Cumulative Intervention	1st Day of Previous Month	Last Day of Previous Month
321	Cumulative Intervention Unit Trend	1st Day of 2 Months Previous	Last Day of Previous Month
330	MIS Code Totals	1st Day of Previous Month	Last Day of Previous Month
340	VANUC	1st Day of Previous Month	Last Day of Previous Month
350	Test "Pilot" Weekly Utilization	1st Day of Previous Week	Last Day of Previous Week

355	Test "Pilot" Analysis	1st Day of Previous Week	Last Day of Previous Week
356	Questionnaire Detail	1st Day of Previous Week	Last Day of Previous Week
370	Unit Reference Manual	N/A	N/A
380	Indirect Analysis	N/A	N/A
390	Instrument Definition	N/A	N/A
410	IRM Totals	1st Day of Previous Month	Last Day of Previous Month
420	IRM Totals By Provider	1st Day of Previous Month	Last Day of Previous Month
430	IRM Totals By Rater & Provider	1st Day of Previous Month	Last Day of Previous Month
431	IRM Reasons for Review	1st Day of Previous Month	Last Day of Previous Month
435	IRM Item Analysis	1st Day of Previous Month	Last Day of Previous Month
440	PCD Totals	1st Day of Previous Month	Last Day of Previous Month
441	PCD Item Analysis	1st Day of Previous Month	Last Day of Previous Month
450	Quality	1st Day of Previous Month	Last Day of Previous Month
451	Patient Quality	1st Day of Previous Month	Last Day of Previous Month
461	Quality Unit Trend	1st Day of 2 Months Previous	Last Day of Previous Month
462	Quality Executive Summary	1st Day of Previous Month	Last Day of Previous Month
490	Export National Database	N/A	N/A
800	System Options	N/A	N/A
810	User Management	N/A	N/A
820	Security Profiles	N/A	N/A
850	Program Definition	N/A	N/A

Once the Use Default Date checkbox is checked the Date value will change to the default value based on the current date.

Patient Search

Patient Search can be used to locate a Patient that is not displayed on the Patient Workload page as expected. It can also be used to find the history of a Patient as they have been Admitted, Transferred, Discharged, etc. The search can be filtered by such values as the Medical Record Number to quickly find the Patient. The data returned by the search will include such items as the Patient's Admit Date & Time and Unit.

To navigate to one of the Patients returned by the Search simply click the hyperlink for their Medical Record Number (Note that the terminology may be different for this column at your facility). This will return you to the Patient Workload page automatically changing the Unit and highlighting the selected Patient. If the Patient is not available in the Unit on the currently selected Date then the Date will be changed to the last Date that the Patient was available on the selected Unit.

Preferences

Click on Preferences to perform various setup tasks specific to your login. Preferences can be used to:

- Select Language
- Change Password
- [Select] Patient List Columns
- [Select] Patient List Sort Order
- [Display] Shared Instruments

Once changes have been made to Preferences click the Close button at the bottom of the page to refresh the browser with selected changes.

Select Language

If your Administrator has made additional languages available you may change your language by selecting it from the Select Language drop down box.

Your selection will be immediately saved once made. Changing the Language will change the “hard” text on all pages to reflect that Language. Text entered into the application, such as Intervention Description & Unit Name will not be translated.

Change Password

To Change your Password enter your User Name and current Password. Then enter a New Password.

The New Password may need to meet requirements selected by your Administrator. If the New Password does not meet these requirements a warning message will be displayed indicating what requirement(s) was not met. This option may not be available if Active Directory is enabled.

Patient List Columns

Patient List Columns can be used to change the displayed columns on the Patient Workload page. To add a column click the drop down box next to the column name and select the order in which you want it to be displayed. To remove a column click the drop down box and select the blank value.

To change the column order use the drop down boxes to select the order that you want the columns to be displayed in. It is possible to assign the same value to two (2) columns.

When this happens the first (1st) column selected will be assigned that value and be placed in that position. The second (2nd) column with the selected value will be placed in the next column and all subsequent columns will be shifted down by one.

To save your changes click the Save button at the bottom of this section.

Patient List Sort Order

You may choose to sort the Patient Workload page by up to three (3) columns.

You may also choose in which direction they are sorted, either Ascending or Descending alphabetically/numerically. Click the Save button at the bottom of this section to save your changes.

The sorted columns will be displayed with an arrow in the header indicating the sort direction. If more than one column is sorted then the Sort Order will be displayed after the arrow.

While on the Patient List page you may select a single Sort Column by clicking on the column header. For example, clicking on Caregiver would change the Sort Column to the Caregiver column.

Shared Instruments

Selecting the checkbox for Show Shared Instruments will display Instruments from other Units that are attached to Patients in the current Unit.

For many users it is important to know the full picture of the care being provided to the Patient. However, this may cause confusion. To simplify the display of the Patient, uncheck the checkbox for Show Shared Instruments in Preferences so that only the current Unit's Instrument(s) is displayed. In the above example this would only display the Orthopedics Instrument.