



Infor Staffing Optimizer for Healthcare Administration Guide

Release 4.1.x

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About this guide

This guide provides conceptual and task information for the administration of Infor Staffing Optimizer for Healthcare.

Use this guide as a reference at your site. This guide shows you how to complete setup and maintenance tasks by using the Staffing Optimizer Administration Console.

Intended audience

This guide is for the administrators and project managers who are responsible for the configuration and maintenance of Infor Staffing Optimizer for Healthcare.

Prerequisite knowledge

To fully understand the information presented in this guide, you should understand the glossary terms and know how to perform these tasks:

- Log onto your workstation
- Start and log into the Staffing Optimizer Administration Console.
- Be familiar with your organization's skills, disciplines, units, programs, and instruments
- Understand the access needs of the Staffing Optimizer user base

Note: This guide provides hints for using common Windows user interface features or shortcuts. For more complete information about Windows, refer to your Windows user manuals.

Related documents

These documents provide additional or related information about Infor Staffing Optimizer for Healthcare and are on the Infor Xtreme Portal:

- *Infor Staffing Optimizer for Healthcare Installation Guide*
- *Infor Staffing Optimizer for Healthcare User Guide*
- *Infor Staffing Optimizer for Healthcare HL7 Interface Guide*
- *Infor Staffing Optimizer for Healthcare Available Hours Interface Guide*
- *Infor Staffing Optimizer for Healthcare Hardware and Software Recommendations*

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1: Getting started

This is an introduction to some key functions of Infor Staffing Optimizer for Healthcare.

Logging into the Staffing Optimizer Administration Console

- 1 Specify the URL of the Administration Console.
- 2 Specify your user name or email and password, and click **Login**.

Navigation

Changing text, numeric, and list values

To edit text and numeric value fields on the **General Options** page, click the value that you want to change and specify the new value. To return the value to its previous state, press Esc. To return the value to its default state, click **Reset**. When you have finished editing values, click **Save**.

To edit list values, double-click the value that you want to change, and select a new value. To return the value to its default state, click **Reset**. When you have finished editing values, click **Save**.

Buttons

These buttons are available on multiple menus in the Administration Console. You can place your mouse over the icon on the appropriate page to see the icon description.

Button	Description
	Save Depending on the page, reset to default or undo all changes
	Add

Button	Description
	Delete
	Preview selected item
	Import
	Export

Resetting or recovering your password

- 1 Specify the URL of the Administration Console.
- 2 Click **Reset forgotten password**.
- 3 Specify your email address and click **Reset password**. An email is sent to the address.
- 4 Click the link, or copy the URL into your browser.
- 5 Specify the new password in the **Password** and **Confirm New Password** fields, and click **Change Password**.

Chapter 2: System options

These system options define a wide variety of settings, codes, and other items that are used throughout Staffing Optimizer as pre-set values:

- General options
- Codes
- Patient services/patient types
- Disciplines, shifts, and skills

General options

The **General Options** page contains a predefined list of options, the values of which you can set to meet the needs of your organization.

Infor sets up your Staffing Optimizer system options at installation, but you may need to edit them as your organization grows or changes.

Internationalization

You can set the default localization settings, add languages, and provide translations of the terms and fields that are used throughout the application.

To internationalize Staffing Optimizer, set a default localization culture that includes settings for date, time and currency. Then assign a system language. The system language determines the language in which the user interface is presented. This includes onscreen text, buttons and controls, and email notifications in both the Administration Console and in Staffing Optimizer.

You can also create user defined languages, which can be used to specify terminology and translations used throughout Staffing Optimizer. For example, you can change the term "caregiver" to "nurse."

The default language, which applies to all users, can be a system language or a user defined language. For example, the base English can be used as a default language, or a user-defined version of English can be created and used in the Administration Console. Each Staffing Optimizer user can specify a language from the available options. For example, if English is the default language and a user defined English is an option, a user could choose user defined English.

Setting the default localization culture

Use this procedure to change the default localization culture and settings that control the ways that dates, times, and currency are displayed throughout the application.

- 1 Select **System Options > Internationalization**.
- 2 Specify this information:

Default localization culture
Specify the language/culture.

Date Format
Specify the format in which dates must be specified and in which they are displayed.

Time Format
Specify the format in which times must be specified and in which they are displayed.

First Day of Week
Specify the day of the week that marks the beginning of the week in the system.

Currency Symbol
Specify the symbol that identifies currency.

- 3 Click **Save**.

Setting default localization culture to default settings

- 1 Select **System Options > Internationalization**.
- 2 Select the **Default localization culture** to which you want to apply default settings.
- 3 Click **Reset**.
- 4 Click **Save**.

Adding languages

Use this procedure to add a language and provide translations of terms that are used in the Staffing Optimizer user interface.

- 1 Select **System Options > Internationalization**.
- 2 Click **English** (default).
- 3 Click **Add**.
- 4 Specify the name of the language, and click **OK**.

Changing the names of languages

- 1 Select **System Options > Internationalization**.
- 2 Click the language.
- 3 Click **Edit**.
- 4 Specify the name of the language, and click **OK**.

Deleting languages

- 1 Select **System Options > Internationalization**.
- 2 Click the language.
- 3 Click **Delete**.

Adding and editing translations of terms/fields

Use this procedure to add translations of terms that are used in the languages/localization cultures.

- 1 Select **System Options > Internationalization**.
- 2 Click the language whose fields you want to translate or edit. The translations are shown. The left column shows the term in English.
- 3 Click the empty space on the row of the term that you want to translate. If a translation exists, click it.
- 4 Specify the translation.
- 5 When you have finished adding and editing translations, click **Save**.

Codes

Infor sets up your Staffing Optimizer system options at installation, but you can edit or add these types of codes as your organization grows or changes:

Code	Description
MIS codes	The Canadian Ministry of Health maintains a standard set of Management Information Systems codes to classify caregiver information. MIS codes are applicable only to Canadian clients.
Alert codes	Use to create and maintain notifications that pertain to special care or medical situations that are assigned to patients.

Code	Description
PCD codes	Percent of Care Delivered as documented codes categorizes the differences in scoring a patient's care during a PCD audit. When projected levels of care fall short of or exceed 100%, a PCD code must be specified by a super-user or project manager to reconcile the difference in the level of prescribed care.
IRM codes	Interrater Monitor Codes reconcile the differences in the scoring of a patient between the caregiver and the rater. When scoring a patient in the Interrater/Reason Mode, you must specify IRM codes for each conflicting intervention. When a code is selected, it appears in the IRM Code column of the Interrater Monitor Code Selection dialog box in Staffing Optimizer.

Adding MIS codes

If required, use this procedure to specify the standard codes for correct identification and reporting for your organization.

- 1 Select **System Options > MIS Codes**.
- 2 Click **Add**.
- 3 Specify the numeric code, name, and description, and click **OK**.
- 4 When you have finished adding codes, click **Save**.

Editing MIS codes

Use this procedure to edit the code, name, and the description.

- 1 Select **System Options > MIS Codes**.
- 2 Click the numeric code, name, and description and specify values.
- 3 When you have finished editing codes, click **Save**.

Deleting MIS codes

Be careful when deleting MIS codes. The Staffing Optimizer Administration Console cannot restore deleted MIS codes.

- 1 Select **System Options > MIS Codes**.

- 2 Click **Delete**.
- 3 When you have finished deleting codes, click **Save**.

Adding alert codes

- 1 Select **System Options > Alert Codes**.
- 2 Click **Add**.
- 3 Specify the name and description, and click **OK**.
- 4 When you have finished adding codes, click **Save**.

Editing alert codes

- 1 Select **System Options > Alert Codes**.
- 2 Click the name and description, and specify values.
- 3 When you have finished editing codes, click **Save**.

Deleting alert codes

Be extremely careful when deleting Alert codes. The Staffing Optimizer Administration Console cannot restore deleted alert codes.

- 1 Select **System Options > Alert Codes**.
- 2 Locate the alert code, and click **Delete**.

Adding PCD codes

- 1 Select **System Options > PCD Codes**.
- 2 Click **Add New**.
- 3 Specify this information:

Description

Specify a description of the PCD code.

Add to Score

Select to make the code available for selection. The difference between prescribed and delivered care is not factored into the audit score.

Active

Select to make the code active in the **Percent of Care Code Selection** dialog box that is used to audit patient care.

- 4 Click **OK**.
- 5 When you have finished adding codes, click **Save**.

Editing PCD codes

- 1 Select **System Options > PCD Codes**.
- 2 Click the description to edit it, and clear or select the **Add to Score** and **Active** check boxes.
- 3 When you have finished editing the codes, click **Save**.

Deleting PCD codes

Be careful when deleting PCD codes. The Staffing Optimizer Administration Console cannot restore deleted PCD codes.

Note: The default PCD code cannot be deleted.

- 1 Select **System Options > PCD Codes**.
- 2 Locate the PCD code, and click **Delete**.
- 3 When you have finished deleting codes, click **Save**.

Adding IRM codes

- 1 Select **System Options > IRM Codes**.
- 2 Click **Add New**.
- 3 Specify this information:

Description

Specify a description of the IRM code.

Add to Score

Select to make the code available for selection. The difference between prescribed and delivered care is not factored into the audit score.

Active

Select to make the code active in the **Interrator Monitor Code Selection** dialog box that is used to audit patient care.

- 4 Click **OK**.
- 5 When you have finished adding codes, click **Save**.

Editing IRM codes

- 1 Select **System Options > IRM Codes**.
- 2 Click the description to edit it, and clear or select the **Add to Score** and **Active** check boxes.
- 3 When you have finished editing codes, click **Save**.

Deleting IRM codes

Be extremely careful when deleting IRM codes. They cannot be restore.

- 1 Select **System Options > IRM Codes**.
- 2 Locate the IRM code, and click **Delete**.
- 3 When you have finished deleting codes, click **Save**.

Patient services

Infor sets up your Staffing Optimizer system options at installation, but you can edit or add to your patient services as your organization grows or changes. The **Patient Services** page categorizes patients by the type of treatment they are to receive. Use this page to define patient services for all units.

Adding patient services

- 1 Select **System Options > Patient Services**.
- 2 Click **Add New**.
- 3 Specify the name, and click **Ok**.
- 4 When you have finished adding patient services, click **Save**.

Editing patient services

- 1 Select **System Options > Patient Services**.
- 2 Click the **Name** field to edit it.
- 3 When you have finished editing patient services, click **Save**.

Deleting patient services

- 1 Select **System Options > Patient Services**.
- 2 Locate the patient service, and click **Delete**.
- 3 When you have finished deleting patient services, click **Save**.

Patient types

The **Patient Types** page categorizes patients using a status identifier that is based on the type of expected required care. Use this page to define all of the patient types that are used throughout your organization.

Adding patient types

- 1 Select **System Options > Patient Types**.
- 2 Click **Add New**.
- 3 Specify this information:

Name

Specify the name of the patient type.

Auto-Discharge

Select so that patients of this type are automatically discharged according to **Auto-Discharge Type** and **Auto-Discharge Time**.

Auto-Discharge Type

Available when **Auto-Discharge** is selected. Designate patients of this type as discharged immediately upon admission or at a specific time of day. This setting is commonly used in emergency room admissions.

Auto-Discharge Time

Available when **Auto-Discharge** is selected and **Auto-Discharge Type** is set to **Selected Time**. Specify the time of day that the patient of this type is automatically discharged.

- 4 Click **OK**.
- 5 When you have finished adding patient types, click **Save**.

Editing patient types

- 1 Select **System Options > Patient Types**.
- 2 Click a field to edit it.
- 3 When you have finished editing patient types, click **Save**.

Deleting patient types

- 1 Select **System Options > Patient Types**.
- 2 Locate the patient type, and click **Delete**.
- 3 When you have finished deleting patient types, click **Save**.

Disciplines

A discipline is a broad job title category that incorporates a definable set of skills. You can create and manage disciplines that are used in Staffing Optimizer. The **Disciplines** page lists the available disciplines and the modification history, and it provides features that you can use to manage the disciplines list.

Disciplines are used in conjunction with shifts and jobs.

Adding disciplines

- 1 Select **System Options > Disciplines**.
- 2 Click **Add New**.
- 3 Specify the name of the discipline, and click **OK**.
- 4 When you have finished adding disciplines, click **Save**.

Editing disciplines

- 1 Select **System Options > Disciplines**.
- 2 Click the discipline name to edit it.
- 3 When you have finished editing disciplines, click **Save**.

Deleting disciplines

- 1 Select **System Options > Disciplines**.
- 2 Locate the discipline, and click **Delete**.
- 3 When you have finished deleting disciplines, click **Save**.

Shifts

A shift is a time period during which staff are on duty. You can define and manage the shifts that are available for use in Staffing Optimizer.

Shifts are used in conjunction with disciplines and jobs.

Adding shifts

- 1 Select **System Options > Shifts**.
- 2 Click **Add New**.
- 3 Specify this information:

Name

Specify the name of the shift.

Begin Time

Specify the time the shift begins.

End Time

Specify the time the shift ends.

Days

Select the days that are included in the shift.

- 4 When you have finished adding shifts, click **Save**.

Editing shifts

- 1 Select **System Options > Shifts**.
- 2 Click a field to edit it, and select or clear the day check boxes.
- 3 When you have finished editing shifts, click **Save**.

Deleting shifts

- 1 Select **System Options > Shifts**.
- 2 Locate the shift, and click **Delete**.

Jobs

A job is a skill or set of skills a caregiver can perform. Jobs are used in conjunction with disciplines and shifts.

Adding jobs

- 1 Select **System Options > Jobs**.
- 2 Click **Add New**.
- 3 Specify this information:

Name

Specify the name of the job.

Annual Hours

Specify the number of hours the job requires on an annual basis.

Unit Producing

Specify the user's job hours in patient care hours.

GNDB

Specify the user's job hours in the GRASP national database.

- 4 Click **OK**.
- 5 When you have finished adding jobs, click **Save**.

Editing jobs

- 1 Select **System Options > Jobs**.
- 2 Click a field to edit it.
- 3 When you have finished editing jobs, click **Save**.

Deleting jobs

- 1 Select **System Options > Jobs**.
- 2 Locate the job, and click **Delete**.
- 3 When you have finished deleting jobs, click **Save**.

Competencies

Competencies are skills, certifications, and competencies that a nurse can possess. After you have created a list of competencies, you can add them to individuals when making assignments.

Adding competencies

- 1 Select **System Options > Competencies**.
- 2 Click **Add New**.
- 3 Specify the name of the competency, select the type, and click **OK**.
- 4 When you have finished adding competencies, click **Save**.

Editing competencies

- 1 Select **System Options > Competencies**.
- 2 Click the **Name** or **Type** field of the competency to make changes.
- 3 After you have made your changes, click **Save**.

Deleting competencies

- 1 Select **System Options > Competencies**.
- 2 Select the competency to delete, and click **Delete**. Competencies assigned to an employee cannot be deleted.
- 3 Click **Save**.

Archive and data warehouse settings

Archive and data warehouse settings are used to specify the period of time over which the hospital retains data in its transactional database. You can view the timing of the most recent Extract/Transform/Load (ETL) job that moved data from the transactional database to the data warehouse.

Viewing archive and data warehouse settings

- 1 Select **System Options > Archive and Data Warehouse Settings**.

2 Review the information in these sections:

Extract/Transform/Load:

Last ETL Run Date

Earliest date of data that was moved during the most recent ETL.

Last ETL Start Date

Date on which the most recent ETL began.

Last ETL Stop Date

Date on which the most recent ETL finished.

Data Warehouse:

Start Date

Start date of the data in the data warehouse.

Stop Date

Most recent date of data in the data warehouse.

Data Archive: The data warehouse archive process makes use of the fact that all data is populated into the GRASP MISTroClef data warehouse and will not change. This process moves data out of the transactional database to improve the efficiency of this database.

Last Archive Date:

Last Archive Date

Most recent date on which the archive job ran successfully.

Setting the period of time that data is retained

Use this procedure to set the number of months that data of various types is retained in the system.

1 Select **System Options > Archive and Data Warehouse Settings**.**2** Specify this information in the Number of months to retain data section:**Daily collected data**

Specify the number of months to retain information that the nurse scores for the patient on a daily basis and the total workload hours that are required for the patient.

Visit Information

Specify the number of months to retain information regarding visits, including the visit number and visit dates.

Employee Information

Specify the number of months to retain information regarding the employee's user profile.

3 Click **Save**.

Security settings

Security settings can be set for Windows authentication and other areas of the application.

Setting security settings

1 Select **System Options > Security Settings**.

2 Specify this information:

Windows Authentication:

Enable Windows Authentication

Select to enable the user to log in with a network ID.

Try default authentication if LDAP fails

When selected, if the user's network ID fails, the system can authenticate the user with the user ID and password.

Default Domain Name

Specify the default domain name.

LDAP Authentication Path

Specify the lightweight directory accessory protocol authentication path.

Other Security Settings:

Display User ID in Logon Screen

When selected, the characters that the user specifies at login are displayed.

Maximum Login Attempts (enter a value between 1 and 5)

Specify the number of times that the user can fail the login process before they are locked out of the system.

Number of Days Before Password Expires (enter a value between 30 and 180)

Specify the number of days for which a password is valid.

Days to Warn User Password will Expire (enter a value between 0 and 7)

Specify the number of days before the date on which a user's password expires that the user receives a warning message.

Minimum UserID Length (enter a value between 3 and 20)

Specify the minimum number of characters allowed for a user's ID.

Maximum UserID Length (enter a value between 3 and 50)

Specify the maximum number of characters allowed for a user's ID.

Minimum Password Length (enter a value between 6 and 50)

Specify the minimum number of characters allowed for a user's password.

Maximum Password Length (enter a value between 6 and 50)

Specify the maximum number of characters allowed for a user's password.

Number of Past Passwords to Compare (enter a value between 0 and 50)

Specify the number of past passwords that the user is not allowed to use again when changing a password.

Check Password Against Lexicon Database

When selected, the new password is checked against this database to prohibit the use of common words in the password.

Password must meet Complexity Requirements

When selected, the new password is checked against the password requirements.

Force Unique Passwords

When selected, the user is prohibited from using any of the previous five passwords.

Login lock Duration in Minutes (enter a value between 0 and 120)

Specify the length of time that a user is locked out before the user can try to login again. In lieu of waiting, users can contact their administrators and request a self-service password reset.

- 3 Click **Save**.

Add-ins

Add-ins are interfaces that customers can purchase, such as the available hours import, the required hours export, and the workload documentation interface. You can view the add-ins that are being used in your implementation of Staffing Optimizer by selecting **System Options > Add-ins** on the Administration Console.

Integration service

The integration service between Staffing Optimizer and Workforce Management is made up of these parts:

- Representational State Transfer (REST) services (endpoints): Send and receive data to and from an external system, including Workforce Management, and Staffing Optimizer. They are idle and wait for a request. They can be accessed by other systems to communicate information such as staffing hours by skill.
- Scheduler service (Windows service): Runs integration tasks between Staffing Optimizer and Workforce Management and invokes the REST services at regular intervals. It is used to communicate with other systems, including Infor Workforce Management, to automatically send information such as required hours by skill.

Chapter 3: User management

You can use the Administration Console to manage user accounts, security profiles, and patient list profiles.

User accounts

Each administrative user and end user has a user account that includes properties. These properties determine the areas of Staffing Optimizer that the user can access and the functions that the user can perform.

First you add a user account, then you set extended account properties:

- Security options
- Units
- Disciplines
- Job title
- Security classification
- Patient list profiles

User accounts are sorted alphabetically by last name initially, but you can sort by any field in either ascending or descending order. Click the column heading by which you want to sort the user account list. Click the same column heading again to reverse the sort order.

Importing user accounts automatically

If you are using a Cloverleaf interface, user accounts can be automatically imported into Staffing Optimizer.

Cloverleaf will be configured during installation and an automated process will be created on the sending site to place the accounts file in the correct folder for Cloverleaf to grab. The folder is polled every 30 minutes and when a new file is detected, it is processed.

- 1 Create a .csv file that contains this information in this format:

```
LAST_NAME, FIRST_NAME, MIDDLE_INIT, USERNAME, EXTERNAL_USERNAME, EMP_ID, PASSWORD, PASSWORD_NEVER_EXPIRES, NO_UNIT_RESTRICTIONS, UNIT, PREFERRED_UNIT, DISCIPLINES, SKILLS
```

- 2 Put this file in the *import* folder at `Cloverleaf\cisn.n\integrator\ISOHsite\data\` where *n.n* is your Cloverleaf version number and *ISOHsite* is the name of your Staffing Optimizer site.

This table defines the information to be specified in the .csv file:

Seq	Name	Type	Length	Required	Valid values	Sample
1	STATUS	String		Yes	Add, Update, Delete	
2	LAST_NAME	String	50	Yes		Doe
3	FIRST_NAME	String	50	Yes		Jane
4	MIDDLE_INIT	String	2	No		A
5	USERNAME	String	100	Yes		JDOE2
6	EXTERNAL_USERNAME	String	100	No		
7	EMP_ID	Number	20	Yes		99999
8	PASSWORD	String		No		
9	PASSWORD_NEVER_EXPIRES	String		No	Yes, No	
10	NO_UNIT_RESTRICTIONS	String		No		
11	UNIT	String	50	Yes	Must map to existing unit	
12	PREFERRED_UNIT	String	50	No	Must map to existing unit	
13	DISCIPLINES	String	50	Yes	Must map to existing disciplines	Nursing
14	SKILL	String	50	Yes	Must map to existing skill	UC

Seq	Name	Type	Length	Required	Valid values	Sample
15	SECURITY_CATEGORY	String		No	Must map to existing Permission Category	
16	SECURITY_CLASS	String		No	Must map to existing Permission Class	
17	PHONE	String	50	Yes		111-222-3333
18	EMAIL	String	256	Yes		Jdoe2@hospital.org
19	SKILL_START	String		Yes	Must parse to a date	1/9/2017

Importing user accounts using the import wizard

Use the import wizard to add multiple users and their basic account settings to the system. Create a .csv file that contains this information in this format:

```
LAST_NAME, FIRST_NAME, MIDDLE_INIT, USERNAME, EXTERNAL_USERNAME, EMP_ID, PASSWORD, PASSWORD_NEVER_EXPIRES, NO_UNIT_RESTRICTIONS, UNIT, PREFERRED_UNIT, DISCIPLINES, SKILLS
```

After you have created the spreadsheet, use this procedure to import the file.

- 1 Select **Users > Accounts**.
- 2 Click the **Import** button that is displayed above the table headings.
- 3 Drag and drop the file or browse for the file and select it.
- 4 Click **Preview** to check the file for accuracy.
- 5 Click **Import** to import the file.

Searching user accounts

To search for a user account, select **Users > Accounts**, and specify a term in the **Search** field in the top right corner. You can search by terms such as name, username, job title, and discipline.

Adding user accounts

When an account is added, its status is set to active. After saving the account, you can change its status.

- 1 Select **Users > Accounts**.
- 2 Click **Add**.
- 3 Specify this information:

First Name

Specify the user's first name.

Last Name

Specify the user's last name.

E-Mail

Specify the user's email address.

User Name

Specify the employee's user name for sign in to Staffing Optimizer.

External Username

Specify the name used for single sign on.

Employee ID

Specify the employee's unique ID.

- 4 Click **OK**.
- 5 Click **Save**.

Editing user accounts

- 1 Select **Users > Accounts > Users>Accounts**.
- 2 Click a field, and specify a new value.
See [Changing user status](#) on page 30.
- 3 When you have finished editing accounts, click **Save**.

Changing user status

User status is used to control the user's ability to access and use Staffing Optimizer.

- 1 Select **Users > Accounts**.
- 2 Locate the account to update, and click **View details > Account Settings**.
- 3 Select the new status:

Active

The user account is active and may be used to log into and use Staffing Optimizer.

Inactive

The user account is available but cannot be used to log into Staffing Optimizer.

Locked

An active user account has been locked because the user exceeded the maximum number of incorrect password attempts.

Terminated

The user account refers to a former employee. The user account is available, but cannot be used to log into Staffing Optimizer.

Deleted

The user account has been deleted and is stored in the Staffing Optimizer database for reference purposes only.

- 4 When you have finished editing the status, click **Save**.

Deleting user accounts

As a part of the administrator's maintenance procedures, you should periodically delete user accounts that are no longer in use. When you set the **Status** of a user account to Deleted, the account is stored in the Staffing Optimizer database for reference purposes.

- 1 Select **Users > Accounts**.
- 2 Locate the user account and click **View detail > Account Settings**.
- 3 Click the **Status** setting, and select **Deleted**.
- 4 Click **Save**.

Unlocking user accounts

The default number of unsuccessful login attempts is three, although your system administrator can change this number. When a user's unsuccessful login attempts are greater than this number, the user's account is locked until an administrator unlocks it.

- 1 Select **Users > Accounts**.
- 2 Locate the locked account, and click **View detail > Account Settings**.
- 3 Click **Status**, and select a new option:

Active

The user account is active and may be used to log into and use Staffing Optimizer.

Inactive

The user account is available but cannot be used to log into Staffing Optimizer.

Terminated

The user account refers to a former employee. The user account is available, but cannot be used to log into Staffing Optimizer.

Deleted

The user account has been deleted and is stored in the Staffing Optimizer database for reference purposes only.

- 4 When you have finished editing the status, click **Save**.

Specifying a user's security options

Use this procedure to specify password settings and to reset a user's password.

- 1 Select **Users > Accounts**.
- 2 Locate the user account, and click **View details > Account Settings**.
- 3 Specify this information:

Password never expires

Select to set the account's password to work indefinitely. If the password is set to never expire, an important Staffing Optimizer security feature, which requires users to change their passwords periodically, is disabled.

Account has no Unit restrictions

Select to give the user access to all units.

Change Password

Click to change the password.

Expire Password

Click to set the user's password expiration date and time to the current date and time. The user must set a new password at the next login.

- 4 Click **Save**.

Specifying a user's units

Use this procedure to select the units to which the user has access for viewing and scoring patient workload.

- 1 Select **Users > Accounts**.
- 2 Locate the user account, and click **View details > Units**.
- 3 Select or clear unit check boxes.
- 4 Click **Save**.

Specifying a user's security disciplines

A discipline is an area of the hospital to which a user belongs, such as nursing, respiratory, or physical therapy. Use this procedure to assign a discipline to a user.

- 1 Select **Users > Accounts**.
- 2 Locate the user account, and click **View details > Disciplines**.
- 3 Select or deselect disciplines.
- 4 Click **Save**.

Specifying a user's job title

- 1 Select **Users > Accounts**.
- 2 Find the user account and click **View details > Account Settings**.
- 3 In the **Job Title** field, select a new title.
- 4 Click **Save**.

Specifying a user's security classification

The permissions list shows the permissions that are assigned to the individual user for each Staffing Optimizer feature. You do not normally need to modify individual permissions. Permissions are typically assigned to categories and classes of user.

See [Security profiles](#) on page 34.

See your system administrator for more information on security category/class designations and the permissions each grants to user accounts.

- 1 Select **Users > Security Profiles**.
- 2 Specify this information:

Category

Select a category of users. Use the buttons to edit or add a new category, reset permission fields, or delete a category. A category with related data cannot be deleted.

Class

Select a class for the category.

Workspaces

Select a workspace.

- 3 Select one of these permission settings for each workspace feature:
 - **No Access:** The user has no access.
 - **Full Access:** The user has read/write access.
 - **Read Only:** The user has read-only access.

- 4 Click **Save**.

Specifying a user's patient list profiles

Patient list profiles determine the columns of data that are displayed on the **Patient Workload** page. These can be customized to meet the needs of the different categories and classes. For example, some users may need to see transfer in and out dates, and some may not.

- 1 Select **Users > Accounts**.
- 2 Locate the user account, and click **View details > Patient List Profile**.
- 3 Select a profile group and a profile, or reset them to the default settings.
- 4 Click **Save**.

Forcing password changes

Use this procedure to expire a user's password so the user must set a new password at the next login.

- 1 Select **Users > Accounts**.
- 2 Locate the user account, and click **View details > Account Settings**.
- 3 If necessary, clear the **Password Never Expires** check box.
- 4 Click **Save**. The **Password Expires** field now indicates that the password will expire and have to be reset the "Next time user logs in."

Security profiles

Security profiles are used to control user access to areas and functions of Staffing Optimizer. A security profile consists of a security category and its member class or classes to which users belong. A security category defines a broad set of permissions that apply in whole or in part to the class or classes that are members of the category.

A security class is a subgroup of a security category that inherits all of the security settings of its parent category by default. You can modify the permissions available to each class. Users are assigned a category and class. Users who are members of a given security class have all of the permissions that are defined for that class. You can also set custom permissions for a selected user, regardless of the assigned security class.

Editing security profile permissions

- 1 Select **Users > Security Profiles**.

- 2 Select a category and class.
- 3 Select a workspace.
- 4 Locate the name of the profile, and in the **Permission** column, select the new permission:

No Access

User has no access.

Full Access

User has read and write access.

Read-Only

User has read-only access.

- 5 Click **Save**.

Patient list profiles

A patient list profile consists of a list of column names that correspond to the columns that are available for display on the Workload workspace for a given category of employee. You can use patient list profiles to restrict certain information to specific categories of employees. You can define as many patient list profiles as necessary.

The new preferences profile category contains all of the default Workload workspace column settings. Any preferences profiles that you add inherit their default column settings from their parent profile.

You can add patient list profiles, change the name of a patient list profile, and specify the columns that each profile contains.

Adding patient list profiles

- 1 Select **Users > Patient List Profiles**.
- 2 Click the profile category to which you want to add the profile, and click **Add New**.
- 3 Specify the name, and click **OK**.
- 4 Click **Save**.

Editing columns in patient list profiles

- 1 Select **Users > Patient List Profiles**.
- 2 Click the profile.
- 3 Click and drag columns from the Available Columns list to the Added Columns list. To remove a column from a profile, drag it from the Added Columns list to the Available Columns list.
- 4 Click **Save**.

Editing patient list profile names

- 1 Select **Users > Patient List Profiles**.
- 2 Click name of the profile that you want to edit.
- 3 Click **Edit**.
- 4 Specify the new name, and click **OK**.
- 5 Click **Save**.

Deleting patient list profiles

Be careful when deleting security profiles. The Staffing Optimizer Administration Console cannot restore deleted security profiles.

- 1 Select **Users > Patient List Profiles**.
- 2 Click the name of profile that you want to delete.
- 3 Click **Delete**.
- 4 Click **Save**.

Chapter 4: Unit management

A unit is a hospital department, such as a neurology unit or an intensive care unit. In Staffing Optimizer, a unit is part of a division, and a division is part of a location. Both location and division are used to organize units. You can set the unit's start date and stop date, or you can set the unit to have no stop date.

Infor sets up your locations, divisions, and units at installation, but you can add new items as your organization changes or grows.

Adding locations

Locations are used to organize divisions. Typically, a location identifies the physical location of a hospital.

- 1 Select **Units > Unit Time Sets**.
- 2 Select **All locations > Add new location**.
- 3 Specify the name of the location.
- 4 Click **OK**.

Editing location names

- 1 Select **Units > Unit Time Sets**.
- 2 Click the location, and click **Edit**.
- 3 Specify the new name.
- 4 Click **OK**.

Adding divisions

- 1 Select **Units > Unit Time Sets**.

- 2 Click the location, and click **Add new division**.
- 3 Specify the name of the new division.
- 4 Click **OK**.

Editing the division name

- 1 Select **Units > Unit Time Sets**.
- 2 Click the division, and click **Edit**.
- 3 Specify the name.
- 4 Click **OK**.

Adding units

- 1 Select **Units > Unit Time Sets**.
- 2 Click the division and click **Add new division**.
- 3 Specify the name of the unit.
- 4 Click **OK**.

Editing unit names

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit, and click **Edit**.
- 3 Click **OK**.

Adding unit time sets

A time set defines the start and stop dates that indicate a unit's availability in Staffing Optimizer. For example, the start and end dates for a time set could coincide with a fiscal quarter. If a unit is not currently in use, you can add a time set to make it available for use. A time set can be copied from the unit or from another unit.

Use this procedure to add a unit time set. After you have added it, configure its settings.

- 1 Select **Units > Unit Time Sets**.
- 2 Click a unit.

- 3 In the Time Set section, click **Add New**.
- 4 Specify this information:
 - Start Date**
Select the date on which the unit will be available to users.
 - Stop Date**
Select the last day the unit can be used.
- 5 Click **Next**.
- 6 To copy a time set, select the unit and time set that you want to copy. If you do not want to copy a time set, clear the **Copy from existing** check box.
- 7 Click **Next**.
- 8 Select a budget set and indirect worksheet. If they do not exist, clear the selections.
- 9 Click **Finish**.

Adding beds

Use this procedure to manually add beds to a unit.

Note: Beds do not have to be added manually if they are automatically built from the ADT interfaces as messages are processed.

- 1 Select **Units > Beds**.
- 2 Select the Location, Division, and Unit.
- 3 Click **Add New**.
- 4 Specify the Name, Description, and Sort Order for the new bed, and click **OK**.
- 5 Click **Save**.

Chapter 5: Unit time sets

After you have added a time set, configure settings for unit definition, shifts, patient types, jobs, standards, and budgets.

Configuring unit definitions

Use this procedure to specify characteristics that determine unit behavior.

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the unit time set, and click **View details > General Settings > Unit Definition**.
- 4 Specify this information:

Start Date

Specify the unit start date.

Stop Date

Specify the unit stop date.

Description

Specify a brief description of the unit.

GNDB Number

Specify the Grasp National Comparative Database (GNDB) number that is assigned to the facility by the corporate office.

MIS Code

Specify the Canadian MIS code that identifies the unit.

Available Beds

Specify the number of beds that are available in the unit.

Licensed Beds

Specify the number of beds that are licensed in the unit.

Fatigue/Delay Factor

Specify the fatigue and delay factor, as a percentage, that is used to calculate the tenths value for each intervention.

Clear Caregiver

Specify the frequency at which caregiver assignments on the Workload workspace are cleared.

Time to Clear Caregiver

If the **Clear Caregiver** setting is set to **Each Shift** or **Once Per Day**, specify the time of day the caregiver is cleared.

- 5 Select the desired options:

Prospective

On the **Workload Workspace Patient Workload** page, this setting determines the default shift when starting Staffing Optimizer. When False, the shift is loaded automatically in progress at the current date and time, as indicated by the workstation date and time. When True, Staffing Optimizer automatically loads the next shift; that is, the shift that follows the one in progress at the current date and time, as indicated by the workstation date and time.

The Cumulative Intervention Reports (320 and 321) also evaluate this setting. When True, the values returned in the reports are divided by the number of shifts. When False, the full values are returned.

Sign-Out Acuity

When selected, a caregiver can score a patient who is out on pass. When not selected, a caregiver cannot score a workload on a patient who is out on pass.

Display Workload Value

When selected, the workload value for each intervention is displayed on the Workload Instruments.

Show Prior Shift WLV's

When selected, the scored interventions from the previous shift are shown in subsequent shifts. The user can remove or add interventions.

Show Cost on Staffing Screen

When selected, monetary costs are shown on the Staffing workspace.

Prefill PCD with 100%

When selected, **Percent of Care Delivered as Documented (PCD)** values are set to 100 percent. In this case, the user should change what was not documented as given 100%. When not selected, an Interrater must specify each PCD value based on chart documentation.

Visible on User Interface

When selected, the unit is visible on the **Patient Workload** view and the **Staffing** view. The user can clear this selection while changes are being made, if they want the unit available only until after the changes are complete.

- 6 Click **Save**.

Adding and configuring shifts

Use this procedure to add and configure shifts that are assigned to the unit.

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > General Settings > Shifts**.
- 4 Click **Add New**.

5 Specify this information:**Name**

Specify the name of the shift.

Description

Specify a short description of the shift.

First

Select if the shift is the first shift of the day.

Begin Time

Specify the time of day that the shift begins.

End Time

Specify the time of day that the shift ends.

Weekdays

Select the days of the week on which the shift occurs.

FTE

Specify the total full-time equivalent hours for the shift in hours and tenths of an hour.

6 Click **Save**.

Deleting shifts

A shift can be deleted only if the shift has not yet been used to collect data.

- 1** Select **Units > Unit Time Sets**.
- 2** Click the unit.
- 3** Locate the time set, and click the **View details > General Settings > Shifts**.
- 4** Click **Delete**.

Configuring patient types

Use this procedure to add and configure the patient types that are assigned to a unit.

- 1** Select **Units > Unit Time Sets**.
- 2** Click the unit.
- 3** Locate the time set, and click the **View details > General Settings > Patient Types**.
- 4** Click **Add New**.
- 5** Specify this information:

Name

Specify the name of the patient type.

Default

Select to have this patient type chosen automatically during the manual admission process.

Auto-Discharge

Select to have patients of this type automatically designated as discharged based on **Auto-Discharge Type** and **Time**.

Auto-Discharge Type

Available when Auto-Discharge is enabled. When selected, patients of this type are designated as discharged immediately upon admission or at a specific time of day. This setting is commonly used in emergency room admissions.

Auto-Discharge Time

Available when Auto-Discharge is enabled and Auto-Discharge Type is set to "Time." Specify the time of day that the patient of this type is automatically discharged.

- 6 Click **Save**.

Configuring groups

Use this procedure to add and configure the patient groups that are assigned to a unit.

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > General Settings > Groups**.
- 4 Click **Add New**.
- 5 Specify this information:

Name

Specify the name of the patient group.

Census Code

Specify the method by which the daily census is computed:

Average Shift is calculated by all patients who have scored workloads for a 24-hour period divided by the number of shifts in a day.

Simple Count is the number of patients who had workload counts for that shift. Used mainly when patients are in for short stay.

- 6 Click **Save**.

Configuring jobs

Use this procedure to add and configure the jobs that are assigned to a unit.

- 1 Select **Units > Unit Time Sets**.

- 2 Click the unit.
- 3 Locate the time set, and click **View details > General Settings > Jobs**.
- 4 Click **Add New**.
- 5 Specify this information:

Name

Specify the name of the job.

Annual Hours

Specify the number of hours that the job requires on an annual basis.

GNDB

Select to include the user's job hours in the GRASP National Database (GNDB).

Unit Producing

Select to include the user's job hours in the GRASP patient care hours.

RN Job

Select to include the job in the skill set of a registered nurse.

- 6 Click **Save**.

Shift jobs

Shift jobs define the number of positions that will be available for assignments when making patient assignments. You can configure shift jobs for each job that is available on the unit.

Configuring shift jobs

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Shift Jobs**.
- 4 Select a shift.
- 5 Click **Add New**, and specify this information:

Name

Select a job.

Count

Specify the number of available positions for the specified job and shift.

- 6 Click **Save**.
- 7 To change a numeric value, click it and specify the new value.
- 8 When you have finished configuring the jobs, click **OK**.

Chapter 6: Shift standards

Shift standards define the standard hours and percentage of each 24-hour week day that is projected to be spent on the associated patient group. Shift standards are listed for all seven days of the week and can be adjusted accordingly for shift differences on selected days. Shift standards can be edited and cloned.

You can configure these types of standards:

- **Skill percent:** The percentage of the total patient care that is attributed to the skill. The sum of all combined jobs must equal 100%.
- **Minimum hours:** A standard number of hours that is required for the job each shift or day. Applicable only for non-GRASP jobs.
- **Standard hours:** The normally acceptable number of hours that the job is staffed for each date or shift. Used only when the user does not have an available hours import.

Configuring standards

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Standards**.
- 4 Locate the shift, and click **Edit**.
- 5 To change a numeric value, click it, and specify the new value.
- 6 When you have finished configuring the standards, click **OK**.

Cloning shift standards

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Standards**.
- 4 Locate the shift, and click the clone icon.
- 5 Select the standard to be cloned.
- 6 Select the details to include in the cloned standard.

7 Click **Ok**.

Chapter 7: Budget

A budget set is a date range that applies to a specific unit and budget fiscal period. Using budget sets, you can keep a historical record of all cost models that your organization has used in the past. You can apply a budget set to each unit individually using the **Pay Rate** and **Budgets** pages. Budget information includes budgeted patient days and hours and costs for each job code, and serves as the basis for the information in the Budgeted Hours Per Patient Day (HPPD).

When you add a budget or when you want to edit a budget, you can configure the settings for these elements:

- **Groups** - Number of patient days that are budgeted for a group. If you have only one total set of budgeted patient days, include them in the first group.
- **Jobs** - Annual budgeted hours and the percentage of the total budget that each shifts represents for each job.
- **Pay Rates** - Average pay rate and the weekend premium, when appropriate, for each job.

Adding budgets

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Budgets**.
- 4 Click **Add New**.
- 5 Specify this information:

Start Date

Specify the start date of the budget.

Stop Date

Specify the stop date for the budget. If left blank, a stop date is automatically specified.

Benefit Percent

Specify the percentage of hourly cost that is added to cover benefits.

- 6 Click **OK**.

Configuring groups in budgets

When you add or edit a budget, you can configure the settings for patient groups.

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Budgets**.
- 4 Locate the budget, and click **Edit**.
- 5 Locate the group, and click the **Patient Days** field. Specify the number of patient days that are budgeted for the group. If you have only one total budgeted patient day, specify it in the first group.
- 6 Click **Save**.

Configuring jobs in budgets

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Budgets**.
- 4 Locate the budget, and click **Edit**.
- 5 Locate the job, and specify this information:
 - Hours**
Specify the number of hours that the job requires on an annual basis.
 - Cost**
Specify the minimal hourly cost that is required to cover benefits.
- 6 Click **Save**.

Adding and configuring budget pay rates

Use this procedure to define and manage pay rates that are associated with each job. These pay rates can be used to build accurate cost models and reports.

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Budgets**.
- 4 Locate the budget, and click **Edit**. The Pay Rates section shows information for the available jobs and the available shifts that have been entered previously.
- 5 Click the **Weekend Premium** field to specify the percentage of the Average Pay Rate that is paid as the weekend premium.
- 6 To modify the pay rate, locate the job, and click **Edit**.

- 7 Click the **Pay Rate** field, and specify an hourly rate. To add a pay rate, click **Add New**, and specify the average rate paid for this job including any shift differentials that apply.
- 8 Click **OK**.

Indirect analysis

An indirect analysis is a list of activities that staff perform that are not associated with patient care, such as cleaning, checking supplies, and attending meetings. Indirect analysis worksheets are attached to patient care instruments and set as Pre X so they are automatically counted into the patient's workload when the workload is scored.

Active	The active/inactive status of the worksheet.
Time Set	The worksheet's beginning and end dates.
Worksheet	The names of the indirect worksheets that are available on the selected unit.
Display Headers	When selected, the indirect care worksheet headings are displayed with subtotals.
Pre X	When selected, the Indirect Care value per patient is automatically added into the total workload score for the patient each shift.
Auto Select	When selected, the Indirect Care Workload value is applied automatically when a patient is admitted. This can save time for the staff and ensure that the intervention is always applied to each patient to which the instrument is attached.
24 Hour	When selected, worksheet data is collected on a 24-hour basis. The 24-hour value is then allocated based on the shift distribution of the workload instrument.

Adding and editing indirect analysis worksheets

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Indirect Analysis**.
- 4 To edit an existing worksheet, click the fields and specify new information. To add a new worksheet, click **Add New**, and specify this information:

Name

Specify the name of the worksheet.

Census

Specify the daily average census for the unit.

Days

Specify the number of days per week that the indirect activities are valid.

MIS Code

If applicable, specify the Canadian MIS code that identifies the unit.

Start Date

Specify the date that the worksheet is available for use.

Stop Date

Specify the date that the available worksheet is no longer available for use.

Active

When selected, the worksheet is available for use.

Shifts

Specify the shifts that are assigned to the worksheet.

- 5 Click **Save**.

Copying indirect analysis worksheets

To save time creating worksheets that share features, use this procedure to copy a worksheet, rename it, and edit the copy.

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Indirect Analysis**.
- 4 Highlight the worksheet that you want to copy by selecting it.
- 5 Click **Copy**, and specify the **Location, Division, Unit, Unit Time Set**, and **Worksheet**.
- 6 Click **OK**.
- 7 Click **Save**.

Adding activities to indirect analysis worksheets

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Indirect Analysis**.
- 4 Click the **Edit** button that is associated with the worksheet that you want to change.
- 5 Click **Activities**, and click **Add New** to create a folder, or click an existing folder in which to add the new activity and skip this step.
- 6 Specify this information:

Name

Specify the name of the activity.

MIS Code

Select the Canadian MIS code that identifies the instrument.

Score

When selected, the Indirect Intervention grouping may be included in the list of interventions for which workload may be scored as specified in **Instrument Time Sets > Indirect Analysis** when **Display Headers** is selected.

Pre X

When selected, the indirect care value per patient is automatically added to the total workload score for the patient for each shift.

Auto-Select

When selected, the indirect care workload value is applied automatically when a patient is admitted. This can save time for the staff and ensure that the intervention is always applied to each patient to which the instrument is attached.

- 7 Click **Save**.
- 8 Click the folder name, and click **Add New**
- 9 Specify the activity name, and click **OK**.
- 10 Specify this information:

Description

Specify a description of the activity.

Line Type

Specify the method by which the activity is counted:

Variable - The activity is counted for every patient that is scored.

Constant - The activity is counted for the unit's workload on a daily basis, regardless of the number of patients that are scored.

Days of the week

Select the days on which the activity is available.

Standard Time

Specify the normal time that the activity takes to perform plus the fatigue and delay.

Minutes PPD

The standard time for the activity is multiplied by the frequency and divided by the average census for the unit.

Minutes Per Day

The total 24 hour value. Standard time is multiplied by frequency for a 24 hour period.

Frequency

Frequency by shift, week, month or year.

- 11 Click **Save**.

Deleting indirect analysis worksheets

Take care when deleting worksheets. The Staffing Optimizer Administration Console cannot restore deleted worksheets. An indirect worksheet cannot be deleted after it has been used to collect data.

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Indirect Analysis**.
- 4 Click the worksheet that you want to delete, and click **Delete**.

Importing indirect analysis worksheets

To save time creating worksheets that share features, you can import a worksheet then rename and edit the copy.

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Indirect Analysis**.
- 4 Click **Import**.
- 5 Drag and drop a file, or browse to select it.
- 6 Click **OK**.
- 7 Click **Import**.

Exporting indirect analysis worksheets

You can export a worksheet to an XML file and can then edit that XML file and import it.

- 1 Select **Units > Unit Time Sets**.
- 2 Click the unit.
- 3 Locate the time set, and click **View details > Indirect Analysis**.
- 4 Click the worksheet that you want to export.
- 5 Click **Export**.

Chapter 8: Questionnaires

Questionnaires are used to collect feedback from staff and use the feedback to assess and refine instruments. Questionnaires contain ranked questions, and they can also include free text questions.

A ranked question is a question whose response is represented as a series of values that range from high to low. The user selects the check box that corresponds to the appropriate value.

A free text question is a question that a manager creates. Its response is represented as a text box into which the user can specify a response. Free text questions can also explain the cause of a problem that is identified in a ranked question. Create one or more free text questions to provide caregivers space to elaborate on an Inadequate or Barely Adequate response to a ranked question.

Adding questionnaires

- 1 Select **Units > Questionnaires**.
- 2 Select a unit.
- 3 Click **Add New**.
- 4 Specify this information:

Questionnaire

Specify the name of the questionnaire.

Start Date

Specify the date on which the questionnaire becomes available.

Stop Date

Specify the date on which the questionnaire is no longer available.

Past Shifts

Specify the number of shifts before the current shift during which users can enter questionnaire data. A value of zero (0) indicates that data cannot be entered before the current shift starts.

Collect By User

When selected, the results of the questionnaire are collected for each individual user instead of all users as a group. This information is available on report 356.

Inherit Actual Hours

When selected, the Actual Hours values on the **Staffing** subpage are derived with values from the staffing workspace for the unit, date, and shift.

Active

When selected, the questionnaire is available.

- 5 Click **OK**.

Adding questions

- 1 Select **Units > Questionnaires**.
- 2 Select a unit.
- 3 Select a questionnaire.
- 4 Click **Ranked Questions** or **Free Text Questions**.
- 5 Click **Add New**.
- 6 Specify this information:

Description

Specify the full text of the question.

Question Sequence Order

Specify the order of the question in the questionnaire.

Active

Select to indicate that the question is available for use in Staffing Optimizer. If the box is clear, the question is stored in the database but is not available for use until it is activated.

- 7 Click **OK**.
- 8 When you have finished adding questions, click **Save**.

Editing questions

- 1 Select **Units > Questionnaires**.
- 2 Select a unit.
- 3 Select a questionnaire.
- 4 Click **Ranked Questions** or **Free Text Questions**.
- 5 Click a field and edit it.
- 6 Click **Save**.

Deleting questions

- 1 Select **Units > Questionnaires**.

- 2 Select a unit.
- 3 Select a questionnaire.
- 4 Locate the question to delete, and click **Delete**.

Deleting questionnaires

Be careful when deleting questionnaires. The Staffing Optimizer Administration Console cannot restore deleted questionnaires. You cannot delete a questionnaire after it has been used to collect data.

- 1 Select **Units > Questionnaires**.
- 2 Select a unit.
- 3 Locate the questionnaire, and click **Delete**.

Exporting questionnaires

- 1 Select **Units > Questionnaires**.
- 2 Select a unit.
- 3 Select a questionnaire.
- 4 Click **Export**.

Importing questionnaires

- 1 Select **Units > Questionnaires**.
- 2 Select a unit.
- 3 Select a questionnaire.
- 4 Click **Import**.
- 5 Drag and drop the file, or browse to select a file.
- 6 Click **OK**.

Copying questionnaires

You can create a copy of a questionnaire that can be used in another unit.

- 1 Select **Units > Questionnaires**.

- 2 Select a unit.
- 3 Select a questionnaire.
- 4 Click **Copy**.
- 5 Specify this information:

Location

Specify the location of the unit to which the questionnaire is being copied.

Division

Specify the division of the unit to which the questionnaire is being copied.

Unit

Specify the unit to which the questionnaire is being copied.

Questionnaire

Specify the questionnaire that is being copied.

Copy Questions too?

Select to have the survey questions copied.

- 6 Click **OK**.

Chapter 9: Beds

Active beds on a Unit are populated via the organization's ADT feed. Beds are populated into the Beds Administration page on a first-in basis and will need to be properly sorted.

If the Organization uses the Proximity feature, the beds will need to be organized based on the units' floor layout in order to properly generate the Bed Proximity table discussed in the next chapter so that more efficient assignments are made.

The sort order will need to be updated any time a bed is added or removed from a unit.

Sorting Beds

- 1 Go to Administration.
- 2 Select **Units > Beds**.
- 3 Select **Location > Division > Unit**.
- 4 **Click** on the row of the bed to be sorted.
- 5 **Drag and drop** the bed into a new row for the proper sort order.

	* Name	Description	* Sort Order	Last Modified	Last Modified By
	340-340-01		1	12/28/2017	HL7User
	340-340-02		2	04/05/2018	HL7User

Chapter 10: Bed Proximity

Bed Proximity is the sum of contributing factors, such as physical distance, and fatigue and delay factors that affect how long it will take a caregiver to get from Room A to Room B.

The Bed Proximity administration page allows the Unit's beds to be assigned a proximity value that will aid in the rendering of efficient patient assignments. The values assigned to an intersection of beds are either (1) Efficient, (2) Acceptable, or (3) Unacceptable.

Best practice would be to set the proximity values based on how assignments are currently made on the Unit. The patient assignment process then takes into the account the values set here on this page and through fine tuning of the proximity values, better proximal assignments may be achieved.

Bed Proximity

- 1 Select **Units > Bed Proximity**.
- 2 Select **Location > Division > Unit**.
- 3 **Complete** the proximity grid.
 - a. **Enter** a value of 1, 2 or 3.
 - b. **Click** save.
 - c. **Any or All** of the grid may be completed at one time*.
- 4 **Update** the values if a unit's layout changes.

You may Save changes, Undo all changes, and navigate to the Tune Auto Assignments page from the tool bar.



* Note that if a bed does not contain a value for Proximity, it will not be considered in the Auto Assignments process feature.

Chapter 11: Tune Auto Assignments

The Tune Auto Assignments page allows the Organization to look at the real-time effectiveness of the Proximity and Continuity of Care values set for several different levels of the Organization, down to the Unit level.

Bed Proximity is the sum of contributing factors such as physical distance, fatigue and delay factors that affect how long it will take a caregiver to get from Room A to Room B.

The Continuity of Care value considers the patient's caregiver assignment history and will attempt to match the caregiver to a patient previously assigned to them.

By selecting a certain set of data from a Location, Division, Unit and/or a specific Shift, the Proximity and Continuity values can be modified to show how a change might affect future assignments. There are five data points to help achieve the desired results.

The Global preferences set for the Organization are visible on this page. Each Division and Unit can have individual values set that differ from the Organization or any other Division or Unit.

Tuning Auto Assignments

- 1 Select **Units > Tune Auto Assignments**.
- 2 Select a **Location**.
- 3 Select a **Division** (if desired).
- 4 Select a **Unit** (if desired).
- 5 Select a **Shift** (if desired).
- 6 Select a **Start** and **Stop Date**.
- 7 Click **Run**.

Location is the only requirement in the Location > Division > Unit criteria. Tuning may be done in any level of detail on this page.

Your data will be displayed in a tabular format below the search filter criteria. After analyzing the results, the Proximity and Continuity values displayed at the far right of the search results may be changed and saved. Re-run your search criteria and view the new results. Continue until the desired results are reached.

Division	Unit		Sum of adjusted proximities	Continuity Rate	Unacceptable bed parings	Average workload	Max workload difference	Continuity	Proximity	
MedSurg	UDMC MEDICAL UNIT	+	58.125	8.25 / 10.875	2.75	3.5284	1.106	Very high ▼	Medium ▼	

Note: making changes to a given Division or Unit does not affect the Organization preferences, only the Division or Unit selected from the search filter criteria.

Sum of Adjusted Proximities: This statistic gives a good measure for the quality of the outcome for the single shift about the bed proximity. The lower the number is that is present means a higher quality outcome has been achieved.

Continuity Rate: This statistic displayed how many assignments were achieved wherein a patient is assigned to a caregiver who has already provided care to them.

Unacceptable Bed Pairings: This statistic will show, based on the proximity value set, how many assignments fall into an Unacceptable range.

Average Workload: This statistic shows the average patient workload assigned across the caregivers on a given shift.

Max Workload Difference: This statistic displays the difference between the highest and lowest patient workload assigned to a caregiver on a given shift.

Chapter 12: Export and import units

Infor sets up your divisions and units at installation, but you may need to add a new division or unit as your organization changes or grows. Exporting and importing units from XML files lets you copy or move a unit without changing any unit settings. When you create a new unit, it is helpful to copy or move a unit without changing any unit settings. You can export an existing similar unit and then import it into a new unit, and update the new unit as necessary.

Exporting units

When you export a unit, the file is downloaded to your computer.

- 1 Select **Units > Time Sets**.
- 2 Select a unit.
- 3 Click **Export**. The export file is saved in the `Downloads` folder.

Importing units

- 1 Select **Units > Time Sets**.
- 2 Click **Import**.
- 3 Browse for and select the file.
- 4 Click **Next**.
- 5 Specify the **Start Date**.
- 6 Select an Indirect Worksheet, and click **Next**.
- 7 Select a Budget Set, and click **Finish**.

Chapter 13: Instrument management

An instrument is a defined set of health care tasks, interventions, and protocols. Instruments are the basic building blocks of Staffing Optimizer primary functions of workload management, staffing, and budgeting. An instrument describes the care that is given to a patient in a unit. It consists of activities, called interventions, that a patient being treated during a shift in a unit might require. Instruments are assigned to patients by patient type.

Instruments are used to collect workflow data. An estimate of the time required to perform an intervention is assigned a workflow value.

The instrument management workspace provides the tools to define instruments and make them available to the appropriate units.

Selecting unit instruments

- 1 Select **Units > Unit Instruments**.
- 2 Select the box that is associated with the instrument that you want to activate on the selected unit.
- 3 Click the corresponding space in the Start Date column and add a date.
- 4 Optionally, click the corresponding space in the Stop Date column and add a date.
- 5 Click **Save**.

Adding instruments

After you add an instrument to the system, access it from the list of instruments, configure it, and activate it.

- 1 Select **Instruments > Instrument Time Sets**.
- 2 Select the unit to which you want to add the instrument, and click **Add new instrument**.
- 3 Specify the instrument name, and click **OK**.
- 4 Click the new instrument, and click **New Instrument Time Set**.
- 5 Specify the start date for the instrument, and click **Next**.

- 6 To copy an existing instrument, select the division, unit, and instrument, select the time set, and click **Next**. To add a new instrument, just click **Next**.
- 7 If the instrument is not for patient activities, select **Non Patient Instrument**. If the instrument is a patient instrument, select the group to which the instrument applies.
- 8 Click **Finish**.
The instrument must now be configured and activated.

Configuring instruments

- 1 Select **Instruments > Instrument Time Sets**.
- 2 Select the instrument.
- 3 Select **View details > General Settings**.
- 4 Specify this information:

Start Date

Specify the date on which the instrument begins.

Stop Date

Specify the date on which the instrument ends. Leave blank if no stop date is desired.

Description

Specify a brief description of the service that is provided on the instrument.

MIS Code

Specify the Canadian MIS code that identifies the instrument.

Adjustment Percent

Specify the percentage by which the workload is adjusted to account for unpredictable activities.

Instrument Length

Specify the length of time that you predict the workload requires or the length of time that the workload was scored retrospectively.

Share Type

Indicate whether the instrument can be shared with other units. When sharing instruments is applied, you can attach the instruments manually or automatically through the HL7 interface from multiple disciplines to a patient in a single location. This is normally the room and bed where the patient is physically located. Using shared instruments eliminates the need to transfer patients manually into the other applicable disciplines, keeping all patient information in a single patient list.

Instrument Type

Specify whether the instrument's interventions are for patient activities or for non-patient activities.

Discipline

Select the discipline that is associated with the instrument.

Clear Check Marks

Specify the frequency at which the instrument's scored interventions are cleared. **Inherit From Clear WLV** means the setting is equal to the **Clear WLV** setting.

Clear WLV

Specify the frequency at which Staffing Optimizer hours are automatically cleared.

Never: The workload pulls forward from the last scored shift to each future shift until the user scores the patient again.

Each Shift: Clear the workload hours every shift. If the user does not score the workload for the patient on each shift, the patient's workload will be zero.

•**Once per Day:** Hours are cleared daily.

Clear Time

If you selected **Once Per Day** in the **Clear WLV** option, you must set the time of day that the check marks are cleared.

Future Days to Allow Scoring

Specify the number of days into the future that caregivers can pre-score a workload.

Past Shifts to Allow Scoring

Specify the number of shifts in the past that caregivers can retroactively score a workload.

Auto-Hide Inclusive Children

When this option is selected, and mutually inclusive interventions are defined for use on the instrument, the child interventions are hidden when the instrument is viewed.

Visible on User Interface

When this option is selected, the instrument is visible to the users within the patient workload web application. Clear it while you work on the instrument.

5 Click **Save**.

Exporting and importing instruments

Infor sets up your instruments at installation, but you may need to rearrange your instruments to reflect changes in your organization. Use export and import to rearrange your instruments without changing any instrument settings. After testing instrument updates in the test environment, you can export the instruments out of the test system and import them into your production system.

Exporting instruments

When you export an instrument, the file is downloaded to your computer.

- 1 Select **Instruments > Instrument Time Sets**.
- 2 Select the instrument.
- 3 Click **Export Files**.

Importing instruments

- 1 Select **Instruments > Instrument Time Sets**.
- 2 Select the instrument.
- 3 Click **Import**.
- 4 Browse and select a file. Click **Next**.
- 5 Select a start date and a stop date, and click **Next**.
- 6 Select a group, and click **Finish**.

Instrument interventions

An intervention represents one activity that can be scored for either direct patient care activities or non-patient care activities. Interventions are created in the intervention library. You can add any of these interventions to an instrument.

Interventions that are already a part of the selected instrument are not added again.

Adding interventions to instruments

- 1 Select **Instruments > Instrument Time Sets**.
- 2 Locate the time set, and select **View details > Attach and Order Interventions**.
- 3 Drag the desired interventions from the Unattached Intervention column to the Attached Interventions In Order column. You can drag and drop the interventions to reorder them.
- 4 Click **Save**.

Arranging interventions

After the interventions have been added, you can re-arrange them by dragging and dropping them in the list. If you drag and drop an intervention into a different element, it updates the **Element** field on the intervention.

Removing interventions from instruments

Interventions should be removed before using the instrument. If data has already been scored using the instrument, do not remove the intervention.

- 1 Select **Instruments > Instrument Time Sets**.
- 2 Select the unit.

- 3 Locate the time set, and select **View details > Edit Interventions**.
- 4 Select the unit type, element, and intervention.
- 5 Click **Delete**. You may have to scroll down to see the button.

Exclusion and inclusion codes

The **Intervention Relationships** page provides lists for Mutually Exclusive, Group Exclusions and Mutually Inclusive groups.

- **Mutually Exclusive Code:** Allows the user to select like interventions and make them mutually exclusive from each other when scoring workload. For example, you can make toileting activities exclusive so that only one out of the group can be selected.
- **Group Exclusive Code:** Makes a single intervention exclusive within a group of interventions. The relationship between interventions in an exclusion group is patient/child – if you select the parent intervention in the Staffing Optimizer workload workspace, you cannot select any of the child interventions. Likewise, if you select one or more of the child interventions, you cannot select the parent intervention.
- **Mutually Inclusive Code:** Establishes a parent/child relationship among a group of related interventions. If you select the parent intervention in the Staffing Optimizer workload workspace, all of the child interventions are automatically selected. If you do not select the parent intervention, you can select any of the child interventions independently.

Configuring and activating patient types

Use this procedure to define and manage the patient types that are assigned to instruments.

- 1 Select **Instruments > Instrument Time Sets**.
- 2 Select an instrument.
- 3 Locate a time set, and select **View details > Patient Types**.
- 4 Specify this information:

Active

Select to make the patient type active.

Unit Patient Type

Select to indicate that patients that are assigned this patient type will automatically be assigned the selected instrument.

Auto-Remove

When selected, when another instrument is assigned to the patient, the first instrument ends automatically.

- 5 Click **Save**.

Intervention library

The intervention library contains the interventions that are used in the instruments. You can add, modify and delete interventions in the library.

Using intervention library filters

Filters can be used to search for specific interventions or groups of interventions that are based on one or more characteristics, such as name and workload value. You can also click **Advanced Search** to set other filters or to clear filters.

- 1 Select **Instruments > Intervention Library**.
- 2 Specify a value (letters or numbers, depending on the filter type) or select an option from the menu, if available.
- 3 After specifying filter values, press Enter, or click **Advanced Search** to search for an intervention or to clear filters.

Adding interventions to the library

- 1 Select **Instruments > . Intervention Library**
- 2 InterventionClick **Add New**.
- 3 Specify this information:

Name

Specify the name of the intervention.

Intervention Type

Select an intervention type:

Count: The time associated with the intervention is for one time and the user specifies the actual frequency that is expected when scoring workload.

Minutes: The user specifies the total minutes that the intervention requires at the time workload is being scored.

•**SelectOnly:** Pre-determined time and frequency. The user can only select the intervention.

Description

Specify a description of the intervention.

Normal Time

Specify the number of minutes that the intervention typically requires to complete.

Frequency

Specify the number of times per day that the intervention is performed.

Unit Type

Specify the unit type to which the intervention applies.

Element

Specify the element to which the intervention applies.

MIS Code

Specify the Canadian MIS code that identifies the intervention.

Alert Code

Specify the alert notification that is assigned to the intervention. An alert icon is displayed in the patient list.

Fatigue & Delay Factor

Select to indicate that the fatigue delay factor that is defined for the unit is applied to the intervention.

Percent Adjustment

Select to indicate that the percentage adjustment that is defined for the instrument is applied to the intervention.

Pre-selected (Mandatory)

Select to indicate that the intervention is automatically selected in the Workloads workspace.

Auto-Select

Select to indicate that the intervention is automatically selected when a patient is admitted. This can save time for the staff and ensure that the intervention is always applied to every patient to which the instrument is attached.

Composite

Select to indicate that the intervention is made up of several small activities that are routinely required to complete the intervention, such as IV care.

Statistic

Select to collect additional information such as number of phone calls or time spent with family members that accounts for hours in the day but may not have a workload value associated with it.

- 4 Click **Save**.

Editing interventions in the intervention library

- 1 Select **Instruments > Intervention Library**.
- 2 Specify filter values, and press Enter, or click **Advanced Search** to select filters to search for an intervention.
- 3 Locate the intervention, and click **Edit**.
- 4 Change the settings, and click **Save**.

Deleting interventions from the intervention library

Be extremely careful when deleting interventions. Deleted interventions cannot be restored. Interventions that already have data collected with them cannot be deleted.

- 1 Select **Instruments > Intervention Library**.

- 2 Specify filter values, and press Enter, or click **Advanced Search** to select filters to search for an intervention.
- 3 Locate the intervention, and click **Delete**.

Unit types

You can add and manage unit types, which are used to further define instruments.

Adding unit types

- 1 Select **Instruments > Unit Types**
- 2 Click **Add New**.
- 3 Specify the name of the unit type.
- 4 Click **Save**.

Editing unit types

- 1 Select **Instruments > Unit Types**
- 2 Click the unit type name, and specify a new name.
- 3 Click **Save**.

Deleting unit types

Be careful when deleting unit types. Deleted unit types cannot be restored.

- 1 Select **Instruments > Unit Types**
- 2 Locate the unit type, and click **Delete**.

Elements

Elements, which you can add, edit, or delete, are created for specific groups of patient care activities. They can be activities of daily living, respiratory activities, etc.

Adding elements

- 1 Select **Instruments > Elements**.
- 2 Click **Add New**.
- 3 Specify the name of the element.
- 4 Click **Save**.

Editing elements

- 1 Select **Instruments > Elements**.
- 2 Click the name of the element.
- 3 Specify the name of the element.
- 4 Click **Save**.

Deleting elements

Be extremely careful when deleting elements. Deleted elements cannot be restored.

- 1 Select **Instruments > Elements**.
- 2 Locate the element, and click **Delete**.

Glossary

budget set

Date range that applies to a specific unit or budget fiscal period.

discipline

A broad job title category that incorporates a definable set of skills. Used to organize jobs.

division

A grouping of units.

fatigue and delay factor

Based on the layout of the unit, location of supplies, and so on, this is the calculated percentage of time that it takes, for example, to walk a long hall to get supplies or fatigue at the end of the day.

group

A collection of patients based on a common characteristic. Similar to patient types in that they can be defined by the kinds of care that patients require.

indirect analysis

A list of supplementary activities that staff perform for the patient's care such as cleaning, checking supplies, and attending meetings. Used in the calculation of unit workloads.

indirect worksheet

List of interventions that are done in support of the patient instead of directly to the patient.

instrument

A defined set of health care tasks, interventions, and protocols that characterize the care that is given to a patient.

intervention

An activity that a patient being treated during a shift in a unit might require.

job

A skill or set of skills a caregiver can perform. Includes the title of a position and the number of hours it requires annually. Used in conjunction with disciplines and shifts.

location

The physical location of a hospital or floor. A location is used to organize divisions.

non-patient instrument

An instrument that is used to track indirect analysis activities.

patient type

The type of patient based on the type of expected required care. For example, a patient type could be created for patients who require emergency care. You can add and configure the patient types that are assigned to a unit. A patient can be assigned only one patient type at a time, but a patient may be assigned different patient types over the course of care.

program

Collection of units, instruments, and disciplines that define a category of care that a facility provides.

shift

A time period during which staff are on duty.

unit

A department in a hospital, such as a neurology unit or an intensive care unit.

unit definition

Characteristics that determine unit behavior.