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Introduction

This guide is intended to be a resource for Application Administrators who support and maintain the tables and reports within Capacity Planner (CP).

This Admin Guide will provide step-by-step instructions to edit existing data elements, as well as adding new ones as your organization changes and grows. It will also offer some tips for troubleshooting common issues, along with those that require opening a Support ticket.

For information on the use of functions, please refer to the Capacity Planner User Guide. It is assumed that the users of this guide understand how the features and functions within Capacity Planner are used.

The terminology used and seen on screen shots may differ from your environment based on the keywords that were selected in the beginning of the implementation. Here are some of the terms that may be used interchangeably throughout this guide:

- Ward = Unit or Department
- Specialty = [Patient] Service Type
- Occupancy = Patient Census
- Theatre = Surgery or Operating Room

Capacity Planner Viewer – Admin Functions

This section documents the administration side of Capacity Planner (CP) Viewer. For explanations of the reports and dashboards please refer to the CP User Guide.

NAVIGATION

Use the icons in the toolbar at the top to navigate to each of the key areas of the application.

01 Hospital Wards Today

Additional Reports: [Daily Report](#) [Occupancy Matrix](#) [Status by Specialty](#)

Wednesday, 5 May 2021 10:45

General Inpatients	Medical	Surgical	Oncology	Cardiac	NICU	Women's Health	Paediatrics
Occupancy	41	139	41	34	43	28	Occupancy
Beds Open	51	135	39	45	0	25	Beds Open
Max Capacity	52	144	41	45	46	45	Max Capacity
Admissions	0	0	0	0	0	0	Admissions
Discharges	0	0	0	2	1	0	Discharges
Pts In	0	2	0	0	1	3	Pts In
Pts Out	0	0	0	2	2	0	Pts Out
ALOS (Days)	3.5	8.9	12.5	7.2	35.9	2.9	ALOS (Days)
Pts >21 Days	0	9	4	2	20	0	Pts >21 Days

Status By

Ward	Occ.	Beds Open	Ward Bed Plan
			340
			315
			290

Projection vs. Actual Occupancy

HELP

The question mark in the top navigation bar opens link to Help documentation in another browser window/tab.

Manuals and User Guides

Capacity Planner

User Guide

Release 8.2.0

April 2021

[Click here to download](#)

REPORTING

There are three different sections under the **Reporting** icon. These should be visible to all users. Outlined in the following pages are how each is configured and used.

01 Hospital Wards Today

Additional Reports: [Daily Report](#) [Occupancy Matrix](#) [Status](#)

Wednesday, 5 May 2021 10:45

General Inpatients	Medical	Surgical	Oncology	Cardiac	NICU	Women's Health
Occupancy: 255	Occupancy: 41	Occupancy: 139	Occupancy: 41	Occupancy: 34	Occupancy: 43	Occupancy: 28
Beds Open: 270	Beds Open: 51	Beds Open: 135	Beds Open: 39	Beds Open: 45	Beds Open: 0	Beds Open: 25
Max Capacity: 282	Max Capacity: 52	Max Capacity: 144	Max Capacity: 41	Max Capacity: 45	Max Capacity: 46	Max Capacity: 45
Admissions: 0	Admissions: 0	Admissions: 0	Admissions: 0	Admissions: 0	Admissions: 0	Admissions: 0
Discharges: 2	Discharges: 0	Discharges: 0	Discharges: 0	Discharges: 2	Discharges: 1	Discharges: 0
Pts In: 2	Pts In: 0	Pts In: 2	Pts In: 0	Pts In: 0	Pts In: 1	Pts In: 3
Pts Out: 2	Pts Out: 0	Pts Out: 0	Pts Out: 0	Pts Out: 2	Pts Out: 2	Pts Out: 0
ALOS (Days): 8.4	ALOS (Days): 3.5	ALOS (Days): 8.9	ALOS (Days): 12.5	ALOS (Days): 7.2	ALOS (Days): 35.9	ALOS (Days): 2.9
Pts >21 Days: 15	Pts >21 Days: 0	Pts >21 Days: 9	Pts >21 Days: 4	Pts >21 Days: 2	Pts >21 Days: 20	Pts >21 Days: 0

Status By: Ward Occ. Beds Ward 340

Projection vs. Actual Occupancy

REPORTS AND REPORT GROUPS

01 Hospital Wards Today

Additional Reports: [Daily Report](#) [Occupancy Matrix](#) [Status](#)

Wednesday, 5 May 2021 10:45

General Inpatients	Medical	Surgical	Oncology	Cardiac	NICU	Women's Health	Paediatrics
Occupancy: 255	Occupancy: 41	Occupancy: 139	Occupancy: 41	Occupancy: 34	Occupancy: 43	Occupancy: 28	Occupancy: 28
Beds Open: 270	Beds Open: 51	Beds Open: 135	Beds Open: 39	Beds Open: 45	Beds Open: 0	Beds Open: 25	Beds Open: 25
Max Capacity: 282	Max Capacity: 52	Max Capacity: 144	Max Capacity: 41	Max Capacity: 45	Max Capacity: 46	Max Capacity: 45	Max Capacity: 45
Admissions: 0	Admissions: 0	Admissions: 0	Admissions: 0	Admissions: 0	Admissions: 0	Admissions: 0	Admissions: 0
Discharges: 2	Discharges: 0	Discharges: 0	Discharges: 0	Discharges: 2	Discharges: 1	Discharges: 0	Discharges: 0
Pts In: 2	Pts In: 0	Pts In: 2	Pts In: 0	Pts In: 0	Pts In: 1	Pts In: 3	Pts In: 3
Pts Out: 2	Pts Out: 0	Pts Out: 0	Pts Out: 0	Pts Out: 2	Pts Out: 2	Pts Out: 0	Pts Out: 0
ALOS (Days): 8.4	ALOS (Days): 3.5	ALOS (Days): 8.9	ALOS (Days): 12.5	ALOS (Days): 7.2	ALOS (Days): 35.9	ALOS (Days): 2.9	ALOS (Days): 2.9
Pts >21 Days: 15	Pts >21 Days: 0	Pts >21 Days: 9	Pts >21 Days: 4	Pts >21 Days: 2	Pts >21 Days: 20	Pts >21 Days: 0	Pts >21 Days: 0

Reports can be set up in the **Report Groups** section for easy access. As Administrators, you can set up groups for others or users can create groups themselves. Users may have access to one or more groups.

To open this section, click **Reporting** on the toolbar at the top of the screen then **Report Groups**. To create a new Report Group or make changes to existing ones, click the **Back to Report Groups** link on the right.

Regional Report

Last Updated: Wed May 5, 2021 11:00 AM

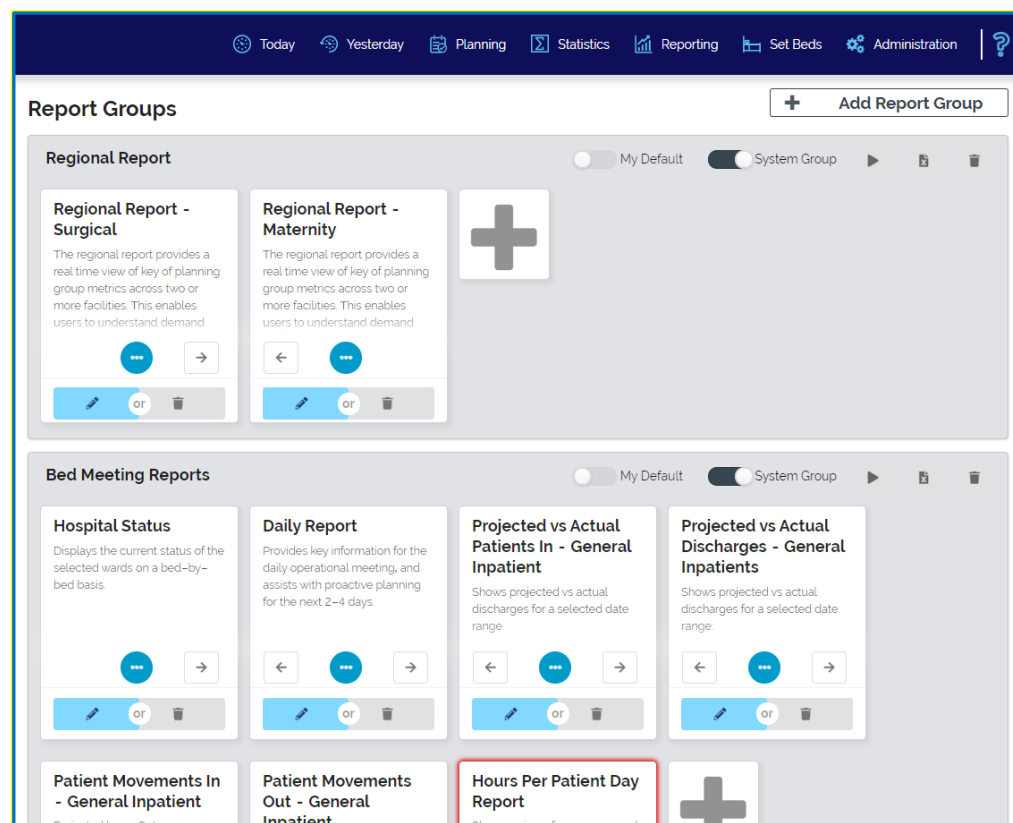
REGIONAL REPORT - SURGICAL REGIONAL REPORT - MATERNITY CONGESTION REPORT

	Capital General	Princess Mary Hospital
Occupancy	141	13
Beds Open	135	0
Admissions Today	1	0
Discharges Today	0	0
Transfers In Today	3	0

From here, you can:

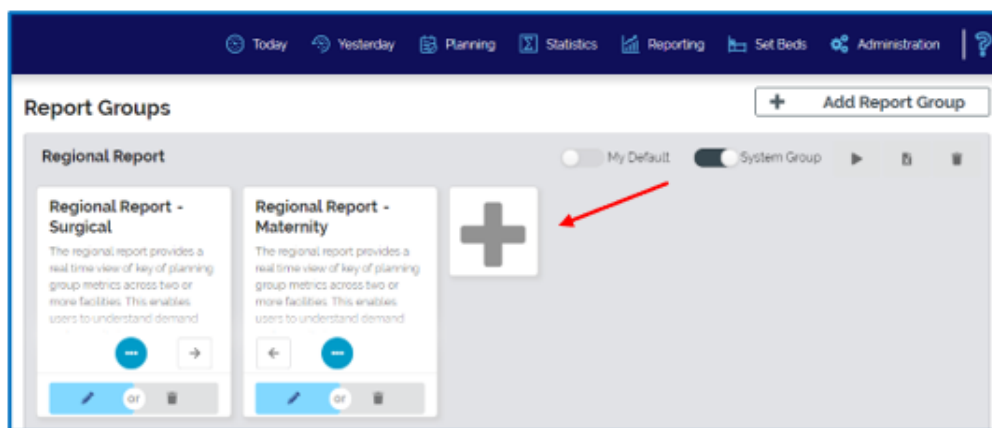
- view reports in a report group
- add a report to a report group
- set or edit report parameters for a report
- set a report group to be visible by everyone (System Group)
- set a report group to be your default (individual users)
- delete a report or a report group (Admins only)
- view a report group in tabs or as a list

REPORT GROUP EDITOR



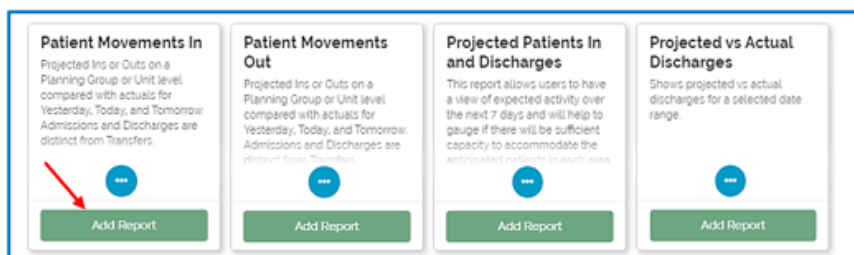
ADD A REPORT TO A GROUP

1. Click the large + icon. A new window displays all available reports.

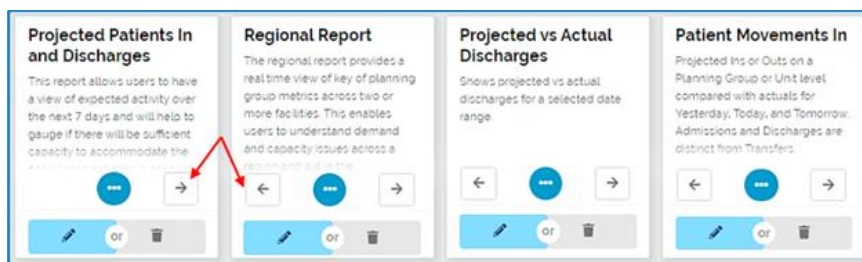


2. To see more information about any report, click the  icon.

3. Select a report from the list and click **Add Report**.

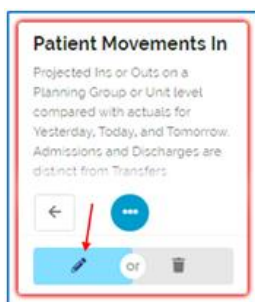


4. To move a report in the group, use the arrows.



EDIT A REPORT IN A GROUP

1. To edit or set report parameters for the currently selected report, click the pen icon:



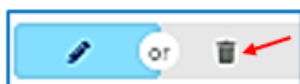
2. Each report has different parameters, but they all work best when hitting "Tab" on your keyboard after each entry.
3. Once you have entered your parameters, click **Save** to keep the changes or click **Cancel** to revert to the previous parameters.

Edit Report Parameters for Patient Movements In

Custom Name	Patient Movements In
Locations	GH - Medicine X
Show Chart	Yes
Show Detail	No

Save
Cancel

4. In any Projected vs Actual report parameters, enter "@today" to set "today" as your default start date so that the report will always show data for the current day, not the date you created the report.
5. To delete a report from a report group, click the bin icon.



MANAGE THE CURRENT REPORT GROUP

1. To run all reports in the current report group, click the arrow icon.



2. To export the current report group to an Excel spreadsheet, click the X file icon.
3. To delete the current report group, from your dashboard, click the bin icon.
4. Set My Default on the report group you wish to see run when you click **Report Groups** from the **Reporting** icon on the toolbar at the top of the screen.
5. Only one default report group can be set per user.

REPORT GROUP VIEWER

When a report group is run, it can be displayed either as a list of reports (scroll down to see each report) or a series of tabs across the screen. A user can select which view they prefer.

Regional Report
Last Updated: Wed May 5, 2021 11:00 AM

[Back to Report Groups](#)

	Capital General	Princess Mary Hospital
Occupancy	141	13
Beds Open	135	0
Admissions Today	1	0
Discharges Today	0	0
Transfers In Today	3	0
Transfers Out Today	0	0
Projected Patients In	52	3

SHOW IN TABS

Button to select Show in Tabs is shown in top right. Reports highlighted below, one report per tab, side by side.

Regional Report
Last Updated: Wed May 5, 2021 11:00 AM

[Back to Report Groups](#)

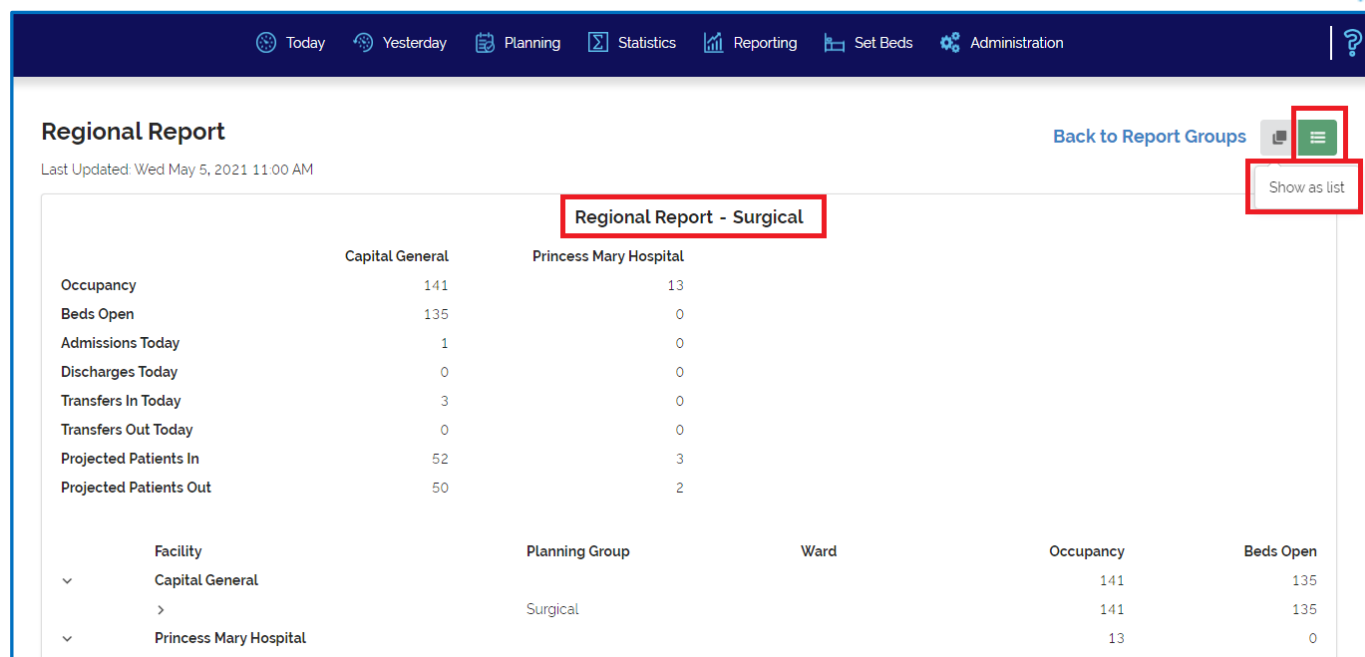
[Show in tabs](#)

	Capital General	Princess Mary Hospital
Occupancy	141	13
Beds Open	135	0
Admissions Today	1	0
Discharges Today	0	0
Transfers In Today	3	0
Transfers Out Today	0	0
Projected Patients In	52	3
Projected Patients Out	50	2

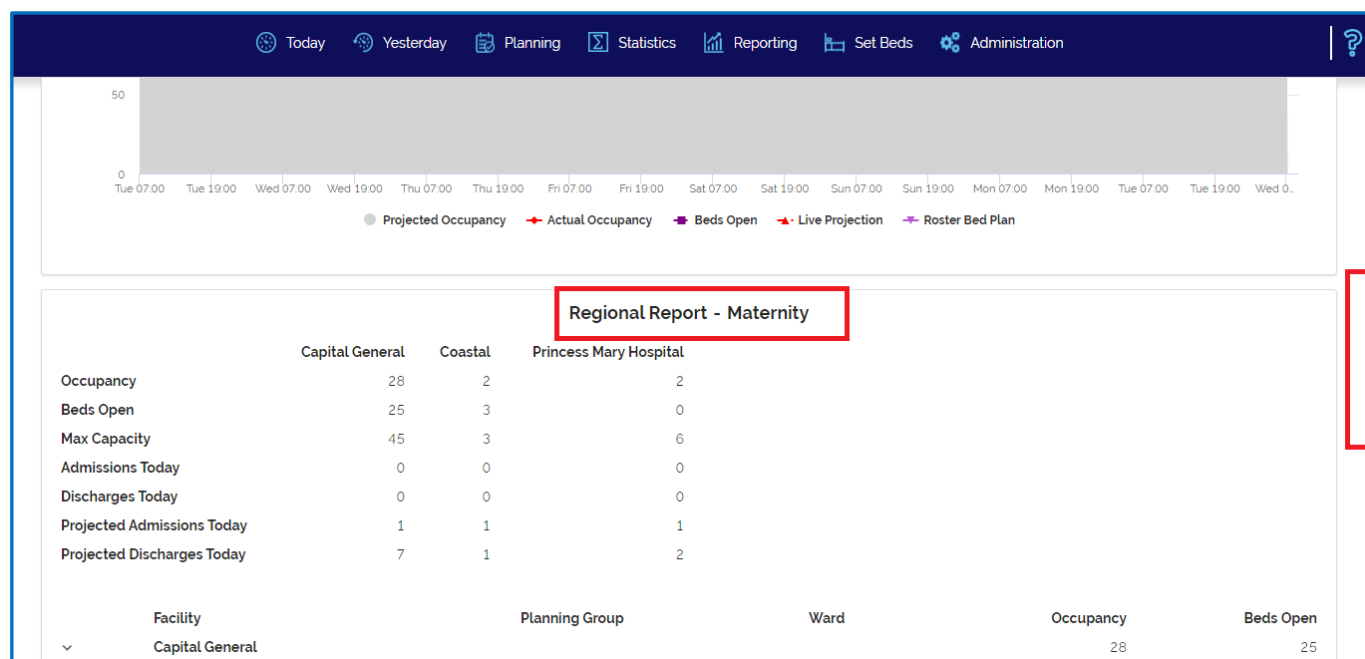
	Facility	Planning Group	Ward	Occupancy	Beds Open
▼	Capital General			141	135
>		Surgical		141	135
▼	Princess Mary Hospital			13	0

SHOW AS LIST

Button to select Show as List is shown in top right. Reports highlighted below, one below the other.



Use side scroll bar to move to the next report(s).



DASHBOARDS

The screenshot shows the '01 Hospital Wards Today' dashboard. The 'Reporting' menu is open, and 'Dashboards' is highlighted. The dashboard displays a table of metrics for various hospital wards.

General Inpatients	Medical	Surgical	Oncology	Cardiac	NICU	Women's Health	Paediatrics
Occupancy	41	139	41	34	43	28	Occupancy
Beds Open	51	135	39	45	0	25	Beds Open
Max Capacity	52	144	41	45	46	45	Max Capacity
Admissions	0	0	0	0	0	0	Admissions
Discharges	0	0	0	2	1	0	Discharges
Pts In	0	2	0	0	1	3	Pts In
Pts Out	0	0	0	2	2	0	Pts Out
ALOS (Days)	3.5	8.9	12.5	7.2	35.9	2.9	ALOS (Days)
Pts >21 Days	0	9	4	2	20	0	Pts >21 Days

Dashboards can be set up in the **Dashboards** section for easy access. As Administrators, you can set these up for others to view. To prevent users from inadvertently deleting a Dashboard, they will not be able to create their own.

To open this section, click **Reporting** on the toolbar at the top of the screen and then **Dashboards** from the dropdown.

From here you can:

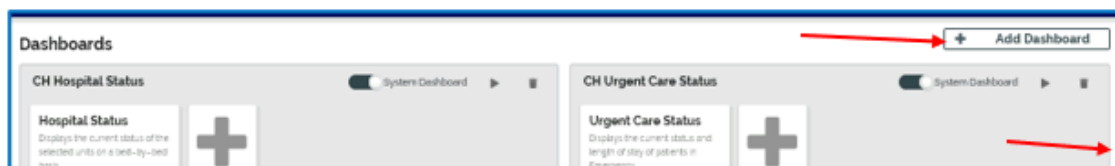
- add a dashboard
- add a report to a dashboard
- set report parameters
- remove a report from the dashboard
- view the dashboard

The screenshot shows the 'Dashboards' section. It contains two dashboard cards:

- Hospital Status**: Displays the current status of the selected wards on a bed-by-bed basis. It has a plus icon to add reports and a toggle for 'System Dashboard'.
- ED Status - Capital General**: Displays the current status and length of stay of patients in the ED. It also has a plus icon to add reports and a toggle for 'System Dashboard'.

ADD A DASHBOARD

1. To add a new dashboard, click **+ Add Dashboard**.
2. The screen will not change, so you will need to scroll to the bottom to see your new Dashboard.

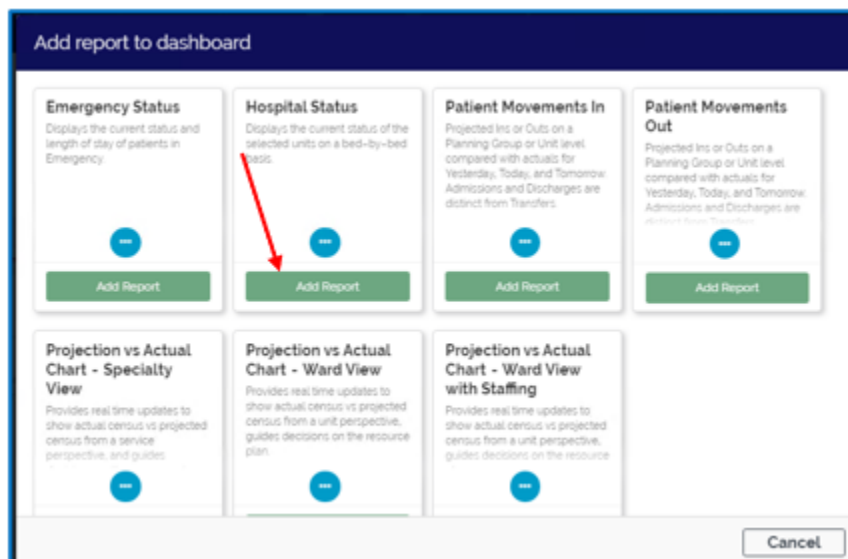


3. It is best to rename the new Dashboard by clicking the title (for example “New Dashboard 2” becomes “Christine’s Dashboard”).



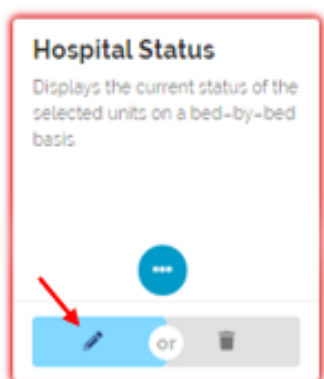
ADD A REPORT TO A DASHBOARD

1. To add a report to the dashboard, click the large + icon.
2. Choose a dashboard report from the choices and click **Add Report**.

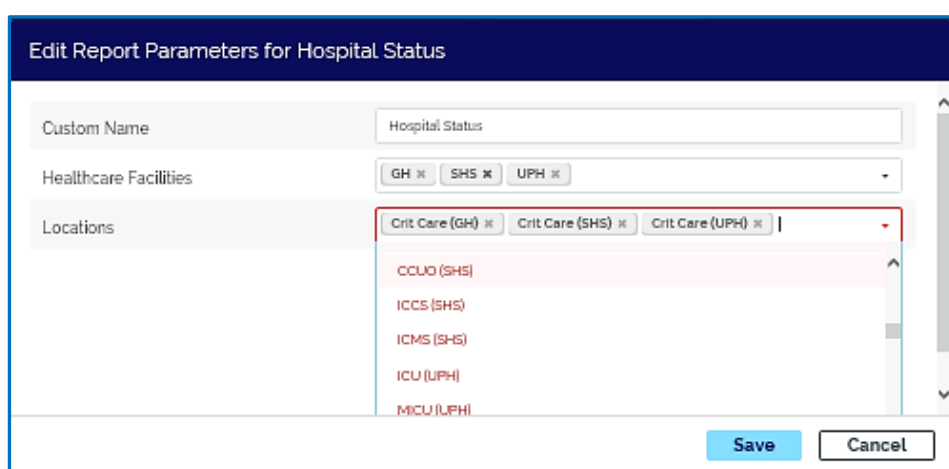


SET OR EDIT REPORT PARAMETERS

1. To set or edit report parameters, click the pen icon. An Edit Report Parameters window opens.

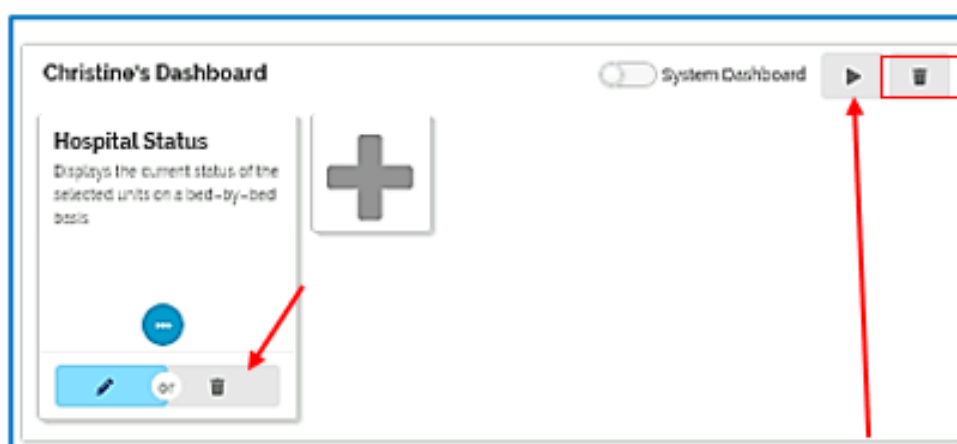


2. Like the reports for the Report Groups, each report has different parameters.



DELETE DASHBOARD OR REPORT FROM A DASHBOARD

1. To delete a report from the dashboard, click the bin icon on the individual report.
2. To delete an entire dashboard, click the bin icon at the top.



VIEW A DASHBOARD

1. To view the currently selected dashboard, click the arrow icon at the top right.

SET BEDS

Set Beds is where the number of beds open are defined for each ward. This was previously known as the “Beds Open Centre”.

From here you can:

- set or change the number of open beds
- set the beds open for wards in one or more planning group
- set start and end dates to beds open for more temporary changes

1. To start, click **Set Beds** from the top toolbar.
2. Select a Healthcare Facility from the drop-down list.
 - a. Note: The Beds Open page will default to the only Healthcare Facility if just a single Healthcare Facility exists.
3. Select one or more Planning Group(s) from the list displayed below the facility.
4. Select one or more wards from those displayed on the right.

Name	From	To	Clear End Date	Beds	Capacity
Cardiac 1	May/05/2021, 12:00	No End Date	Clear	37	37
Medical 3	May/05/2021, 12:00	No End Date	Clear	12	12

Capacity Planner Viewer – Admin Functions

5. Choose **From** date (if it should be different from the default of the current date and time).
 - a. Choose the date from calendar by clicking in the **From** field.
 - i. Use arrows to change month forward or backwards.
 - ii. Click the date from the calendar to select.
 - b. Choose the time by clicking **select time** at the bottom of the calendar.
 - c. Slide the bar up or down to select the time and then click **Ok** at the bottom.

Name	From	To	Clear End Date	Beds	Capacity
Cardiac 1	Apr/13/2021, 15:00	No End Date		37	37
Medical 3	Apr/13/2021, 15:00	No End Date		12	12
Cardiac 2	Apr/13/2021, 15:00	No End Date		8	8
Medical 6	Apr/13/2021, 15:00	No End Date		16	16

6. The **To** date can be left blank to indicate no end date.
7. Enter the number of beds open in the **Beds** field.

Name	From	To	Clear End Date	Beds	Capacity
Cardiac 1	Apr/13/2021, 15:00	No End Date	Clear	37	37
Medical 3	Apr/13/2021, 15:00	No End Date	Clear	12	12
Cardiac 2	Apr/13/2021, 15:00	No End Date	Clear	8	8
Medical 6	Apr/13/2021, 15:00	No End Date	Clear	16	16

8. The **Capacity** numbers represent the max capacity (physical beds). If an entry in the **Beds** field exceeds that Capacity, a message like this will display. To fix, just change the value so it does not exceed the Capacity.
 - a. Note: If the beds open truly should be higher but the Capacity is not set properly, the Max Capacity must be changed in **Application Setup** first (shown later in this document).

Clear End Date	Beds	Capacity
Clear	6	5
Clear	20	24

9. To confirm your changes, click **Save**.

10. To revert to the previous settings, click **Clear**.

ADMINISTRATION

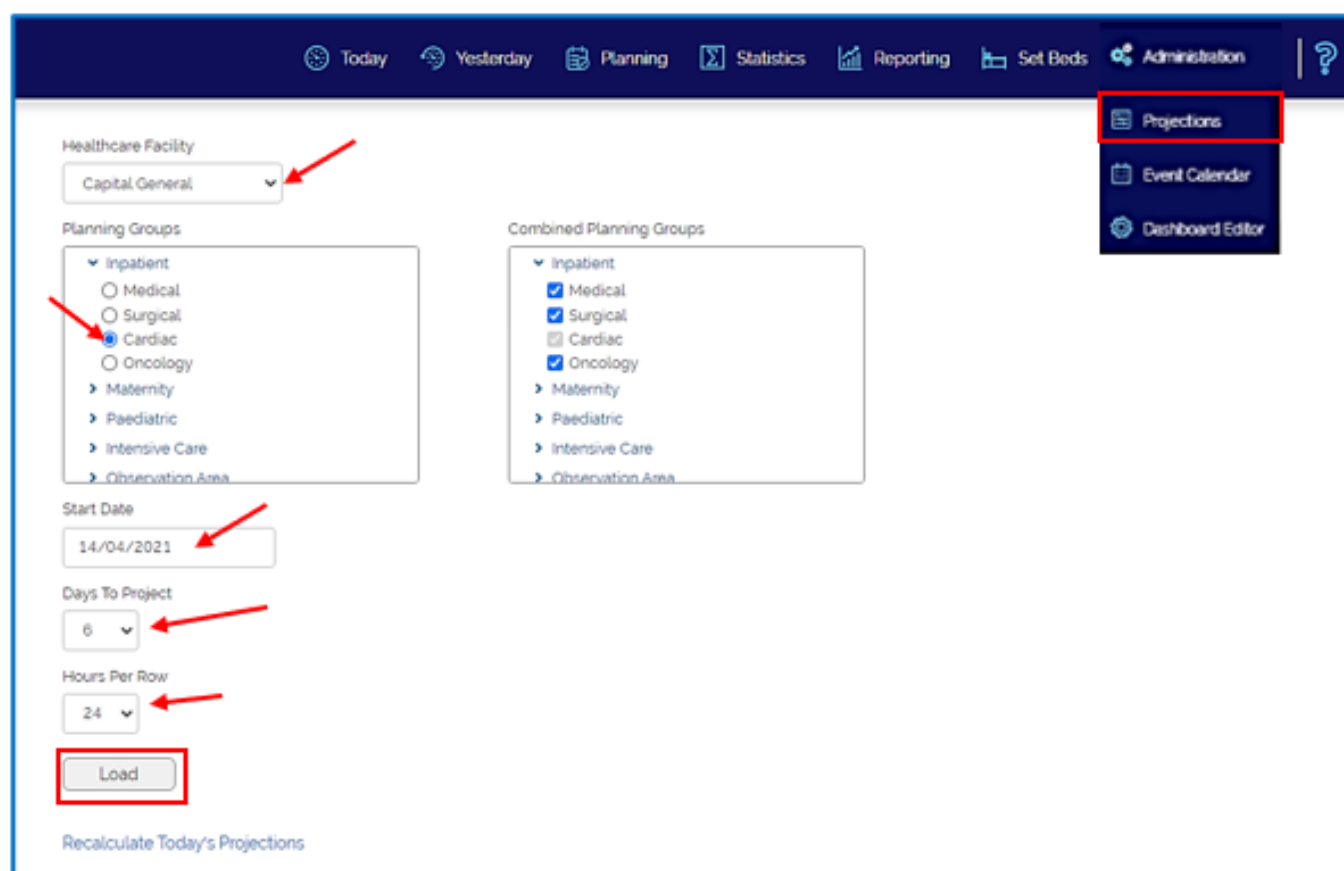


The multiple functions under the **Administration** icon (for those with the appropriate access) are each defined on the following pages.

PROJECTIONS

This function enables Admins to adjust and manage projections relating to the effects of unexpected peaks and troughs in demand, such as a major accident or weather event. Planned and recurring events are managed in the Event Calendar instead (see next section).

1. Select **Administration** from the top toolbar and then **Projections**.
2. Select the **Healthcare Facility** and **Planning Group**.



3. Choose the **Start Date**, any changes to **Days To Project**, **Hours Per Day** and click **Load**.

Capacity Planner Viewer – Admin Functions

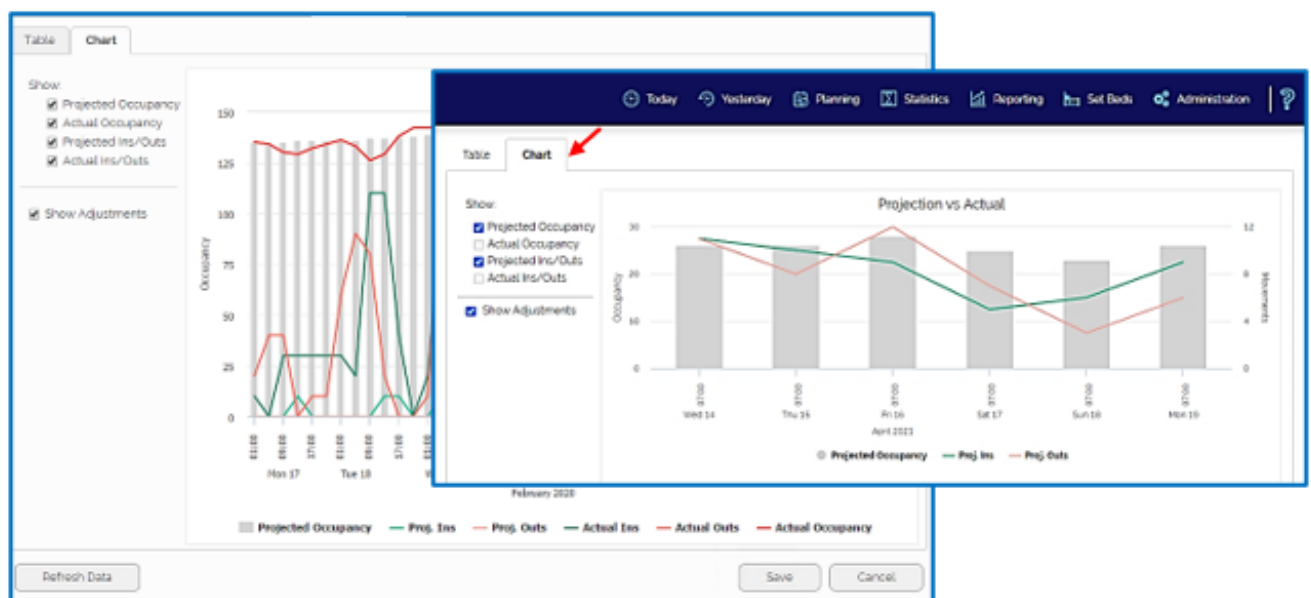
4. From here, you can increase or decrease the number of **Patients In** or **Patients Out**.
 - a. To increase the projected number of patients in or out for a group, enter the *additional* number of patients in the **Adjustments** field for that date/time.
 - b. To decrease the projected number of patients in or out for a group, enter the value as a negative number by adding a minus sign first (e.g., “-1.0”)
5. When finished, click **Save**.

Surgery Planning Group								Combined Planning Groups		
Time	Occupancy As At	Projected	Patients In Adjustments	Total	Projected	Patients Out Adjustments	Total	Occupancy As At	Patients In	Patients Out
17:00	137.7	0.9		0.9	0.1		0.1	559.8	2.3	0.3
Subtotals		2.3	0.0	2.3	0.2	0.0	0.2		9.8	1.4
Tuesday, 18 February 2020										
21:00	138.5	0.3		0.3	0.1		0.1	561.9	1.5	0.1
1:00	138.6	0.3		0.3	0.2		0.2	563.2	1.6	0.5
5:00	138.7	0.6		0.6	0.1		0.1	564.3	1.8	0.8
9:00	139.3	0.6		0.6	0.1		0.1	565.3	3.1	0.6
13:00	139.8	1.1	-1.0	0.1	0.0	1.0	1.0	567.8	2.5	1.3
17:00	138.9	0.3		0.3	0.0		0.0	569.0	1.6	0.1
Subtotals		3.2	-1.0	2.2	0.5	1.0	1.5		12.2	3.4
Wednesday, 19 February 2020										
21:00	139.2	0.1		0.1	0.0		0.0	570.6	0.9	0.1
1:00	139.3	0.4		0.4	0.1		0.1	571.4	1.7	0.2
5:00	139.7	0.9		0.9	0.3		0.3	572.9	2.2	0.9
9:00	140.3	1.6		1.6	0.1		0.1	574.2	2.9	0.7
13:00	141.8	0.5		0.5	0.2		0.2	576.5	2.7	1.3

Combined Planning Groups: Critical Care, Surgery, Medicine, Women's Health, Child Health, Child Adol MH, Mental Health, Rehab, Adult ED ...

Refresh Data Save Cancel

6. Click the **Chart** tab to view the changes in a chart format.
 - a. Note: Actual Occupancy and Actual Ins/Outs can only be viewed if including past dates.
 - b. Below are different views – one showing 4-hour increments and the other 24 hours.



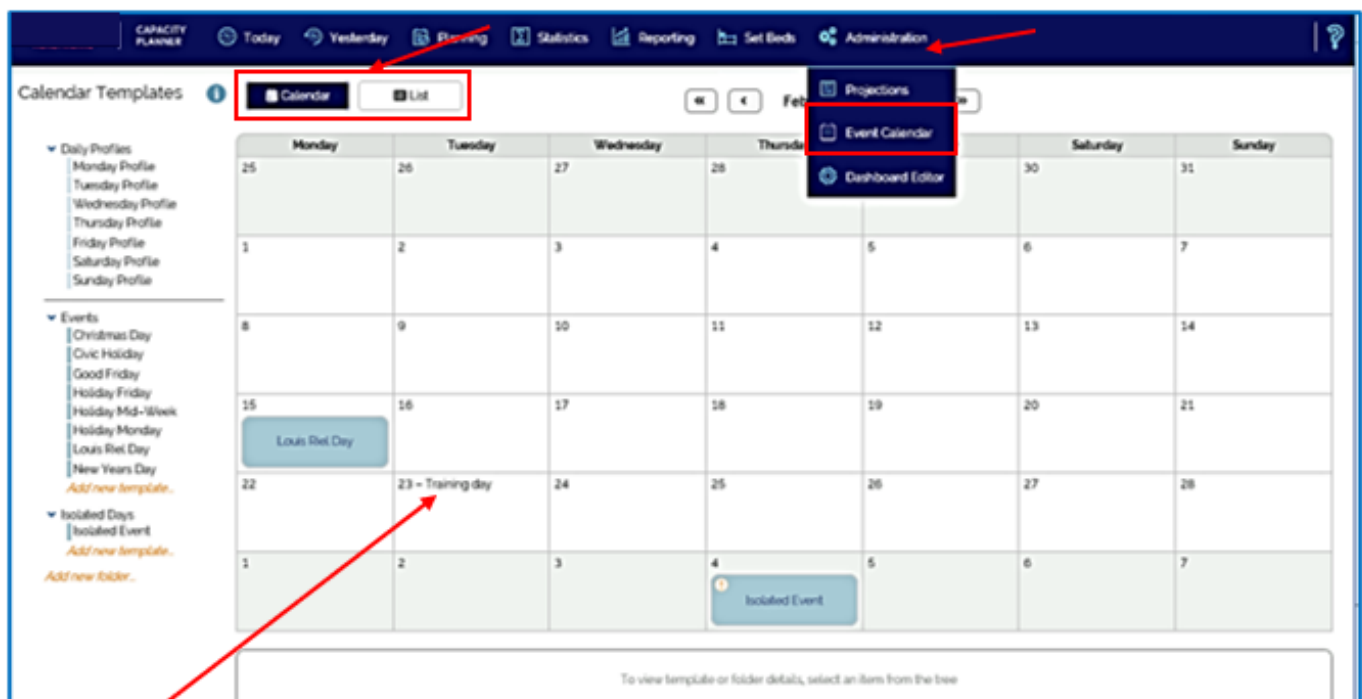
EVENT CALENDAR

The **Event Calendar** is a way to best utilize the history in Capacity Planner to mimic the patient volumes from a past event so they will impact Projections the next time the event takes place. This is an enterprise-wide tool, so anything other than an informational-only name or note on a day could impact Projections for that date across the organization.

The Event Calendar has the following multiple components:

- **Daily Profiles:** These allow you to change the Projections to match the typical patients in and out volumes on that day of week over the last 12 weeks.
- **Events:** These are recurring events like holidays that behave the same each year.
- **Isolated Days:** These are ways to remove all projected patients in or out for that date in the past, so they are not averaged into the Projections for the next 12 weeks. These can be single day anomalies that either greatly raise or greatly lower the number of patients in or out due to an unforeseen event. **Caution: These should never be entered for dates in the future!**

Click **Administration** from the top navigation bar and then choose **Event Calendar** from the dropdown. The Event Calendar can be displayed in either Calendar view (shown below) or List view.

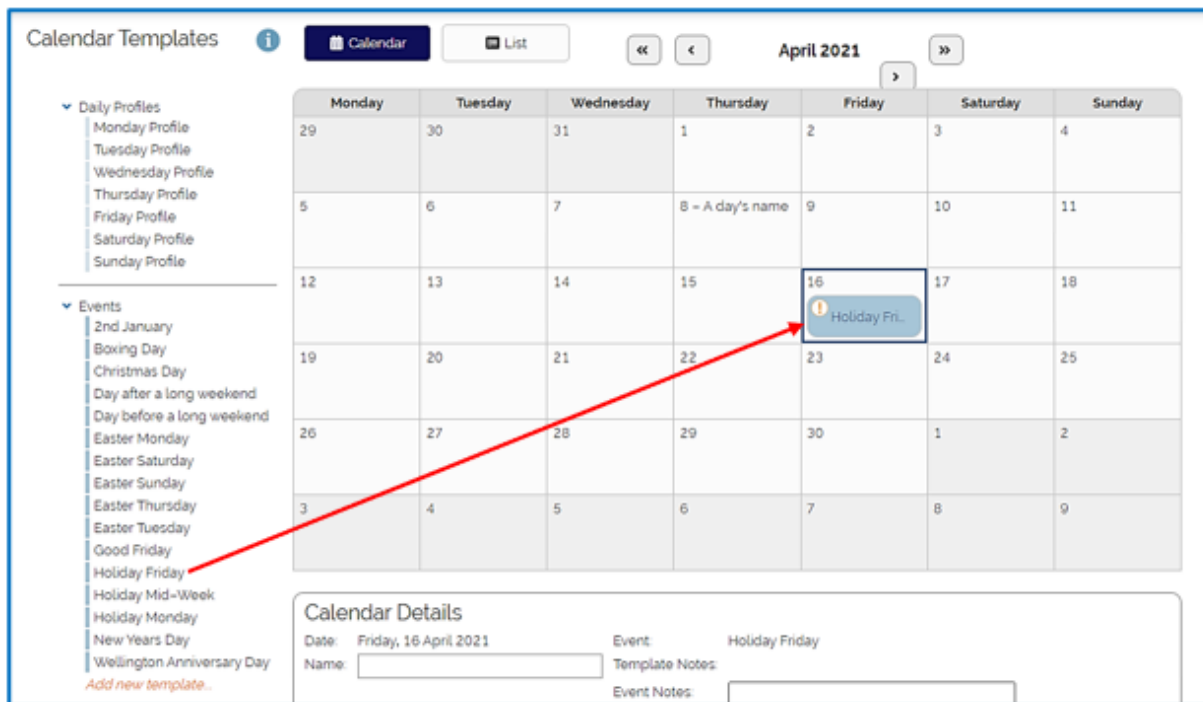


NAME A DAY (INFORMATIONAL ONLY)

- This can be used to make a note for future reference (e.g. start of a change to volumes or to note a Training Day as shown above) by single-clicking on the day and typing in the Name in the box below.
 - Note: This will not impact Projections unless it is repeated on another day.

ASSIGN AN EVENT TO A DAY

1. Predefined **Events** can be assigned to a day by just dragging the Event to the calendar and dropping it on the appropriate day.
2. Since this is the first occurrence of this Event, it displays with an asterisk. This is an indicator that you also need to add it to the last time this event happened so there is a reference.



3. Click the double-left arrow next to the month to go to the previous year. This gives the system a frame of reference and will use the previous year's volumes for this year's projected patients in and out.



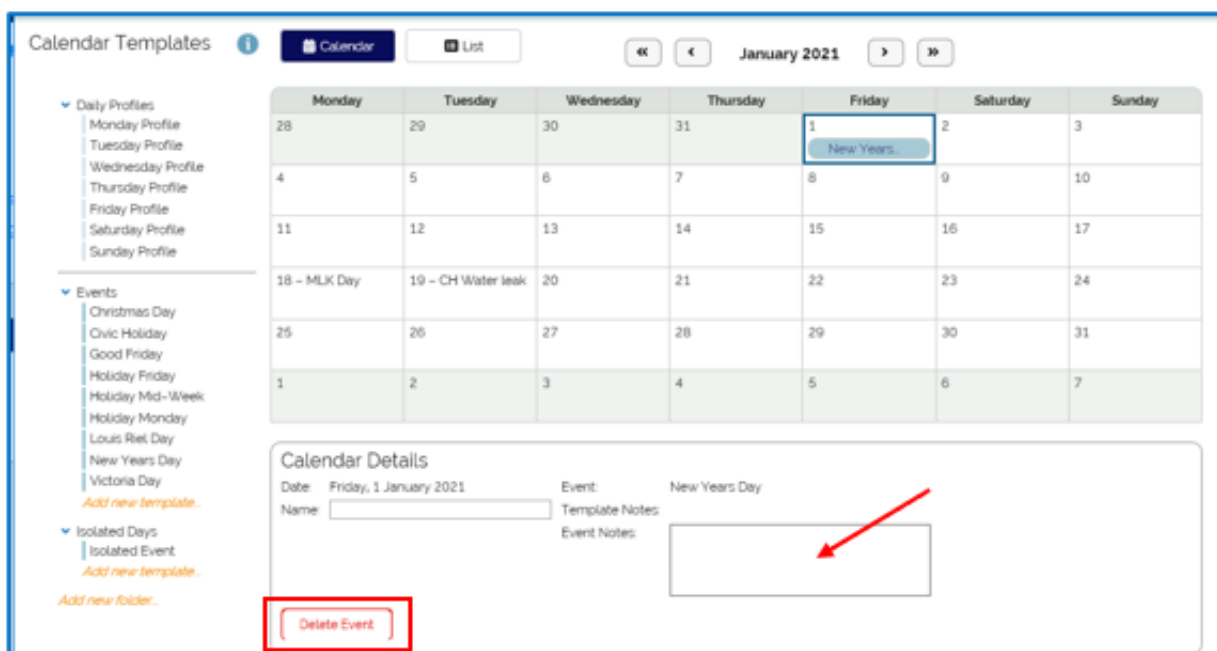
4. To add the same event to the following year, click the double-right arrow instead.
5. By adding this same event onto past year(s) and future year(s), only the first instance of the event will display the asterisk.

Tips:

- Be careful when placing Events onto the Event Calendar for holidays that change day of the week. For example, Christmas Day may that falls on a Wednesday may be quite different than one that falls on a Sunday.
 - For these, you may be better off determining which day of the week's volume best resembles this holiday and then place that corresponding Daily Profile onto the holiday date instead.
- Since the days surrounding holidays are also often impacted, you may want to consider adding Daily Profiles to the day(s) before and/or after a major holiday if it falls in the middle of the week.
 - Another option is to define specific holiday surrounding days like the Easter ones shown in the example above. This way, if these behave the same each year, they can easily be added to the calendar.
- If there are holidays that routinely fall on the same day but do not share the same patient volumes, it would be better to have them listed separately.

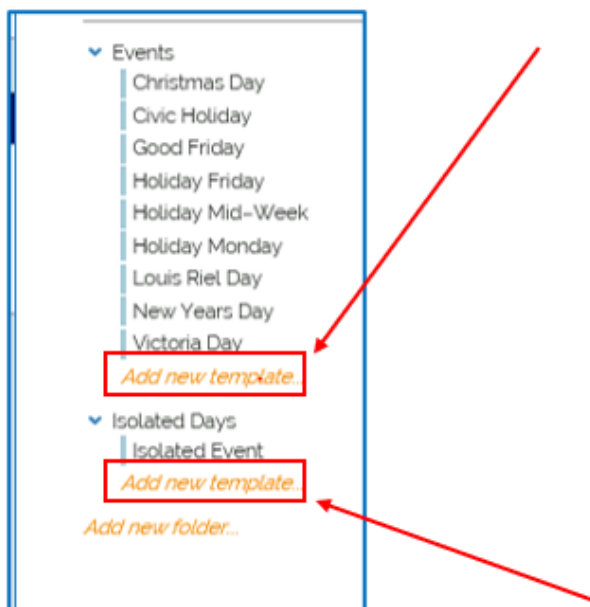
EDIT OR DELETE EVENT OR DAILY PROFILE

1. If an Event or Daily Profile has been added in error, it can be deleted by simply navigating to the date on the calendar and clicking **Delete Event**.
2. If it just needs to be edited (e.g., to add notes), just click in the **Event Notes** box to add more information.



ADD NEW TEMPLATE

1. To add a new template for a recurring event, simply click **Add new template** on the left under either **Events**.



2. To add a non-recurring event, click **Add new template** on the left under **Isolated Days**.

Capacity Planner Viewer – Admin Functions

- Then enter the name and any notes you may need to reference and click **OK**.

Add New Template

Name:

Notes:

OK

- Once created, you can then navigate to the appropriate date and drag the new Event onto the calendar.

Calendar Templates Calendar List May 2021

Daily Profiles

- Monday Profile
- Tuesday Profile
- Wednesday Profile
- Thursday Profile
- Friday Profile
- Saturday Profile
- Sunday Profile

Events

- Christmas Day
- Civic Holiday
- Good Friday
- Holiday Friday
- Holiday Mid-Week
- Holiday Monday
- Louis Riel Day
- New Years Day
- Victoria Day
- [Add new template...](#)

Isolated Days

- Isolated Event
- [Add new template...](#)
- [Add new folder...](#)

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24 Victoria Day	25	26	27	28	29	30
31	1	2	3	4	5	6

Calendar Details

Date: Monday, 24 May 2021 Event: Victoria Day

Name: Template Notes:

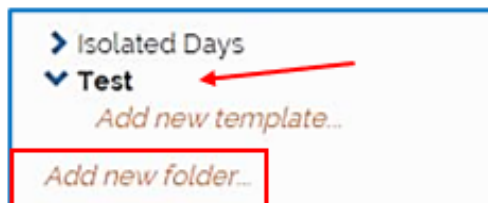
Event Notes:

[Delete Event](#)

- Do not forget to add the new Event to the previous 2 years as well.

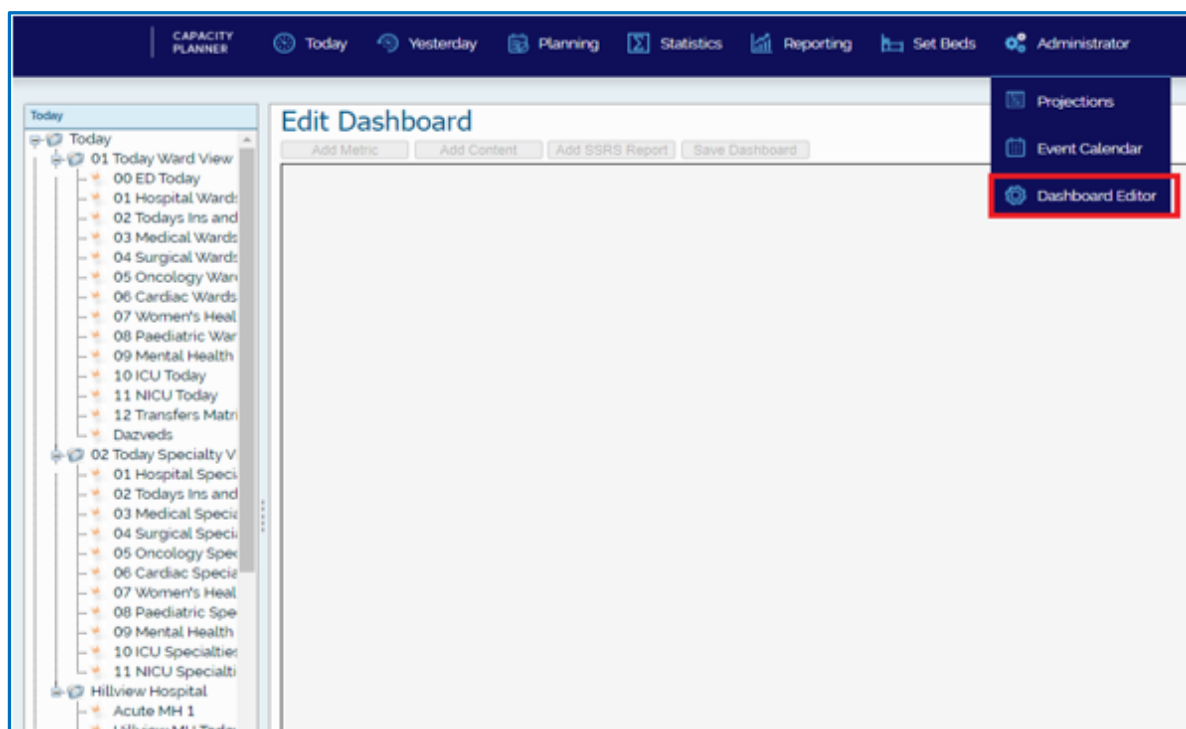
ADD NEW FOLDER

New folders can be added and named specific to the need. If adding a new folder, it will display under the 'Isolated Days' in the listing.



DASHBOARD EDITOR

Dashboard Editor is where changes to the Viewer dashboards are carried out.

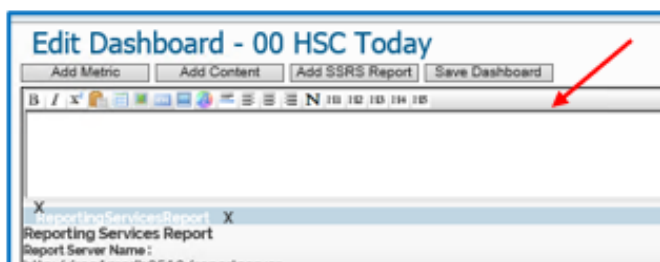


1. To open Dashboard Editor, click on **Administration** from the top navigation bar and select **Dashboard Editor** from the dropdown.
2. Select the dashboard from the listing on the left that is broken out into Today, Yesterday and Weekly (that displays as 'Planning' dashboards).
3. After selecting the dashboard to be edited, several changes can be made. Each is outlined on the following pages.

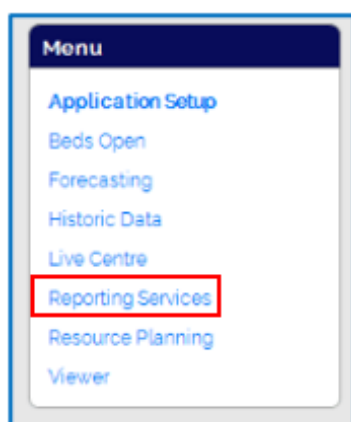


ADD A HYPERLINK

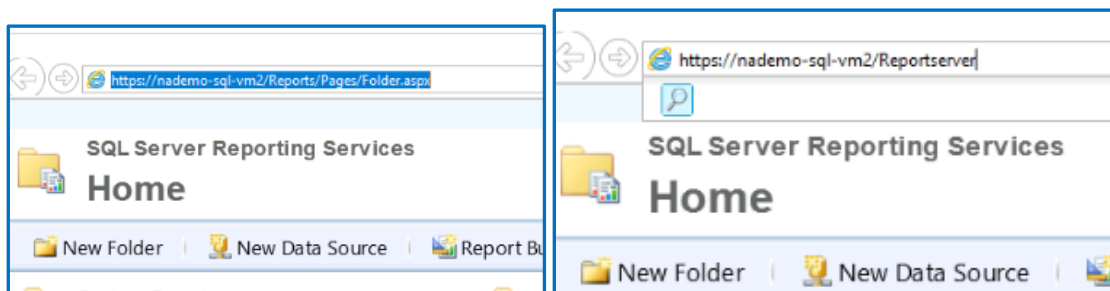
1. A new hyperlink can be added to a new or existing dashboard by clicking the **Add Content** button (unless this is already part of the dashboard).
2. You may need to resize or reposition the box to be located where you want it to display. To do this, just grab the blank portion of the box and dragging it to the desired location or expand it by pulling on the bottom right corner.



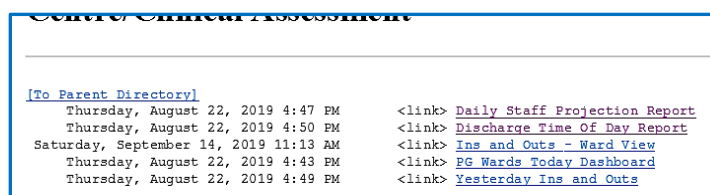
3. To get the hyperlink, follow these steps.
 - a. From the 'thick client', click the link to **Reporting Services** from the Menu.



- b. This will open the Report Manager. From here, click in the address bar and from the back of the address, delete all after the word "Reports" and type "erver" so that it reads "ReportServer" at the end of the address and click the Enter key.



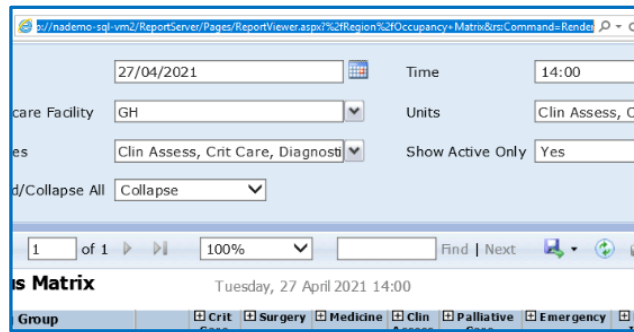
- c. From here, locate and open the folder that contains the report you want to add as a hyperlink.
 - i. Note, you may have to start with a Region or Facility named folder, and then Planning Group or other subfolder(s) before you get to your report.



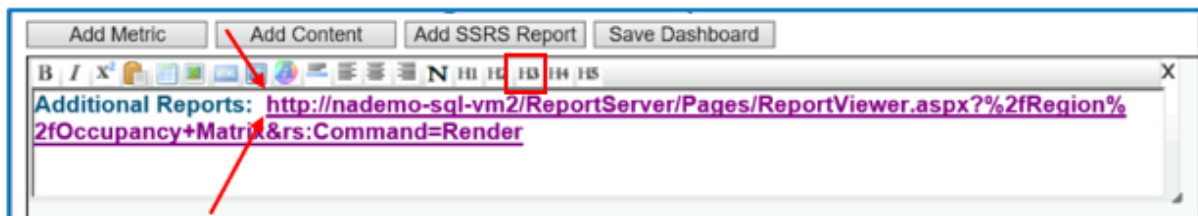
- d. Once you have the report located, select it so that it runs.

Capacity Planner Viewer – Admin Functions

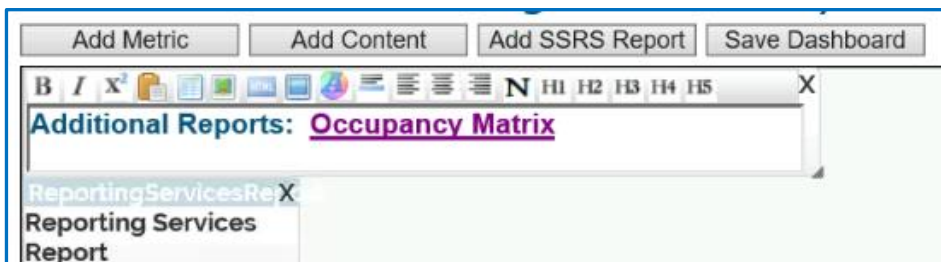
- e. Click in the address bar and copy the link.
- i. Ctrl + C or right-click and choose 'Copy'.



4. Next, go back to Dashboard Editor in the Viewer.
5. Click into that content box.
6. You may want to add an intro (e.g., "Additional Reports" first). To make it visible, you may want to first click "H3" (Heading 3) so it is sized to make it more visible.
7. Next, paste that hyperlink that was copied.



8. Put your cursor at the beginning of the hyperlink and delete (not backspace) all the text before the actual report name itself (shown above between the two arrows).
9. Next, use your arrow keys on the keyboard to get to the + sign right after the first word. Anyplace there are plus signs (+), replace them with a space by hitting the space bar and then Delete.
10. In the above example, the report name only has two words. At the end of the report name, continue to hit Delete until all the additional letters and symbols are removed.
11. The end result should look something like this.



12. Note: You do have the option of renaming the report if needed by adding the new name in the middle of the hyperlink itself and deleting all around it by using the arrows and delete key.
13. You may need to resize the box (by grabbing the bottom right corner).
14. Note, elements on the dashboard cannot overlap or an error message displays.
15. If more links are to be added, be sure to add spaces in between each so they can be easily clicked separately.

ADD SSRS REPORT

1. To add an SSRS report to display full screen, click the **Add SSRS Report** button.



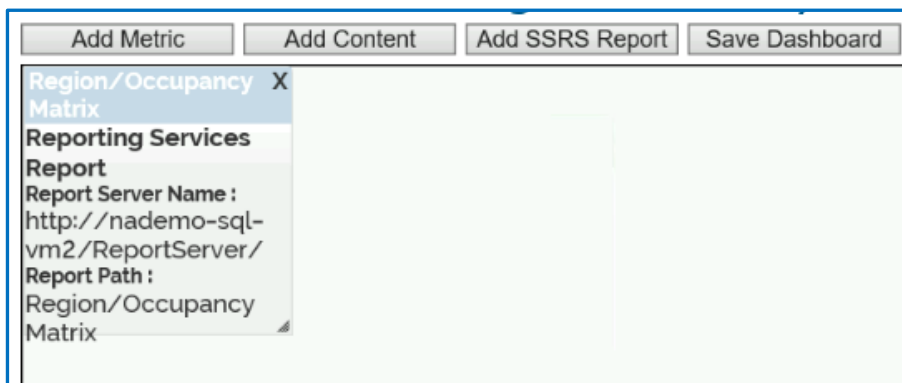
2. An **Add Capacity Planner content** box pops up.

A screenshot of a modal dialog box titled 'Add Capacity Planner content'. It has a close button (X) in the top right corner. The dialog contains two text input fields. The first field is labeled 'Please enter report server path e.g. http://{machinename}/reportserver'. The second field is labeled 'Please enter report path e.g. /CapPlan Standard Reports/Hospital Name/General Inpatient/Daily Report'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

3. In the first field, enter the beginning of the report address (through "Report Server").
4. In the second field, enter the location of the report (folder and report name). It should look something like this:

A screenshot of the 'Add Capacity Planner content' dialog box, similar to the previous one, but with example text entered into the fields. The first field contains 'http://nademo-sql-vm2/ReportServer/'. The second field contains 'Region/Occupancy Matrix'. A red arrow points to the first field. The 'Save' and 'Cancel' buttons at the bottom are highlighted with a red rectangular box.

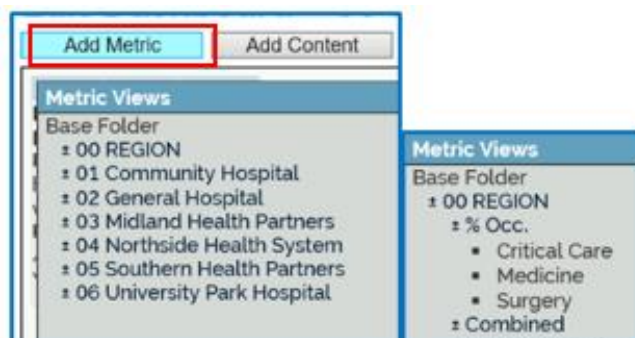
5. Click **Save**.
6. The report will automatically be placed in the top left corner of the screen. It only needs moved if you want to add something like a Content Box above it. There is no need to resize the box.



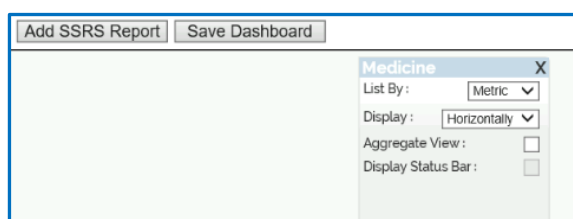
ADD METRIC VIEW

Metric Views can also be added to dashboards.

1. Click **Add Metric** and the box showing all the available Metric Views and their folders displays.



2. Expand the appropriate folder to show the Metric Views.
3. Drag and drop the Metric View onto the dashboard behind and then click the X to close the box that shows all the Metric Views.
4. A new box will display on the Dashboard.
5. You can change the direction of the display (Vertically vs. Horizontally) and resize or reposition the view if needed.



6. When all changes are made to this dashboard, click **Save Dashboard** button.
7. If any elements overlap, you will see a message like this. Just close the box and move the data elements around on the page so they do not overlap.



8. If placed correctly, the Status Message will show "Dash saved successfully".

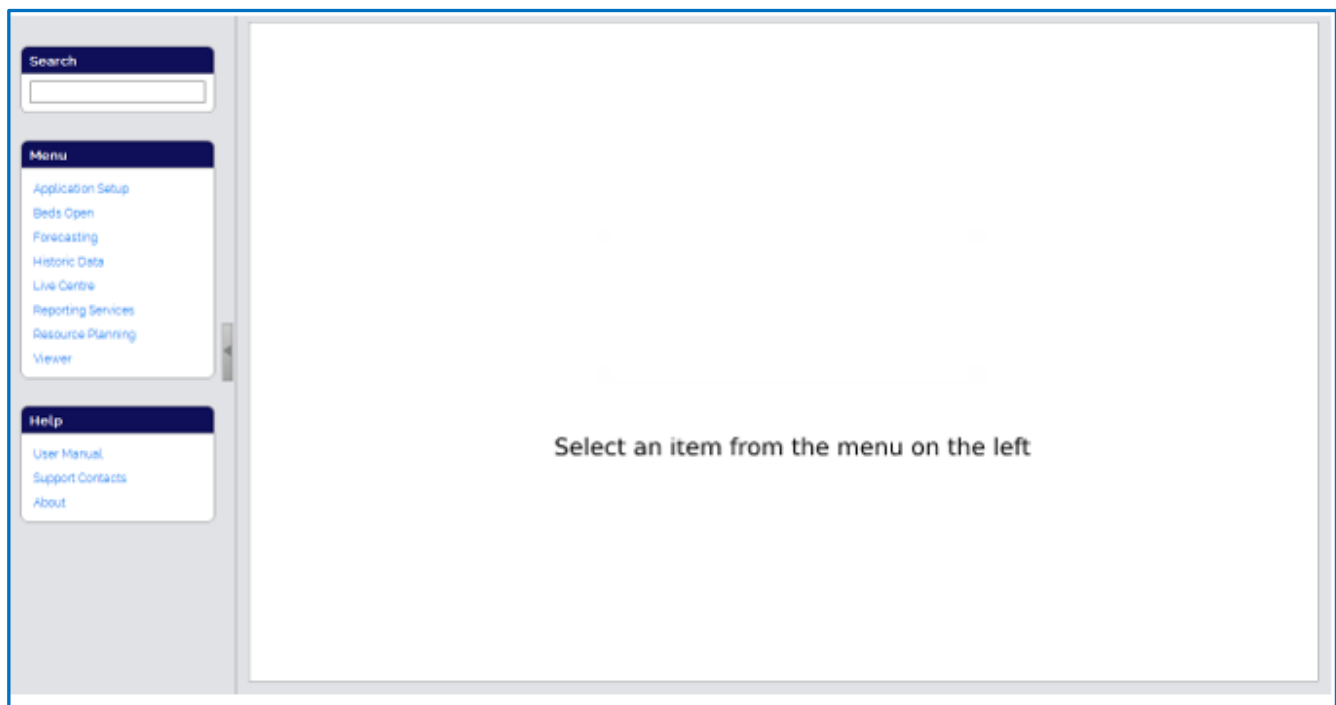


9. Next, view the Dashboard and make sure it displays as desired and all elements fit on the page appropriately.
10. The last step is to test the hyperlink and make sure it can be clicked and the correct report displays.

Capacity Planner (Thick Client)

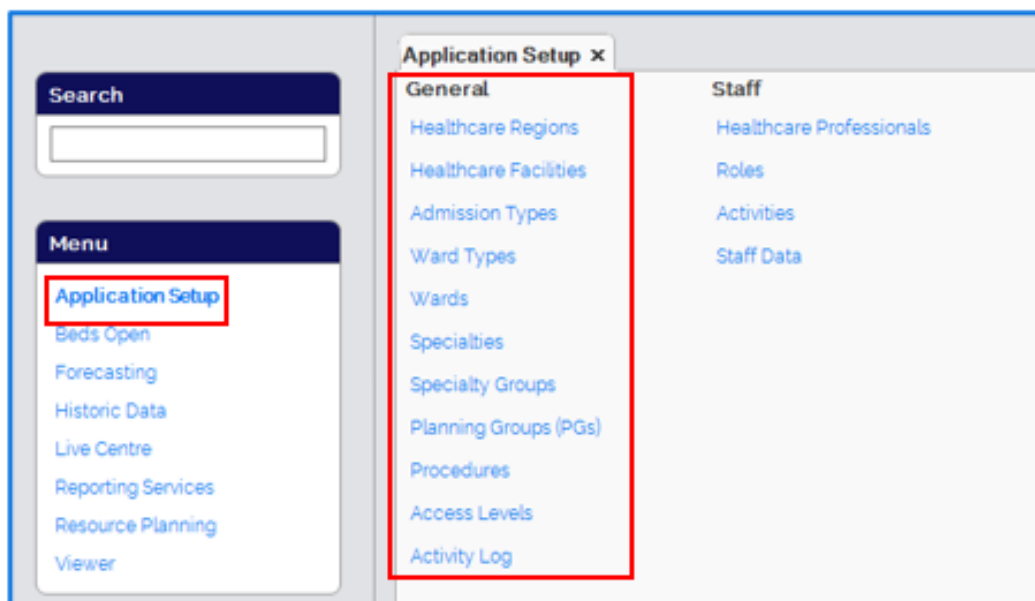


NAVIGATION

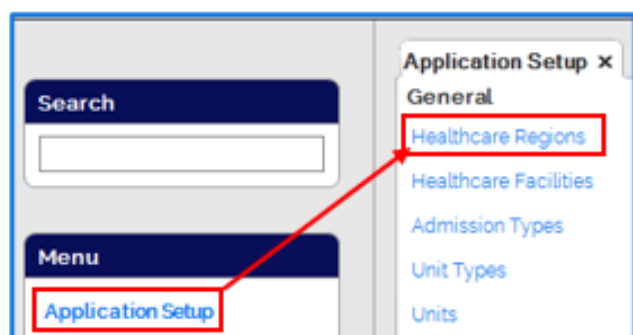


APPLICATION SETUP - GENERAL

Application Setup is the control room that drives Capacity Planner and is where Administrators can enter, maintain and adjust information.



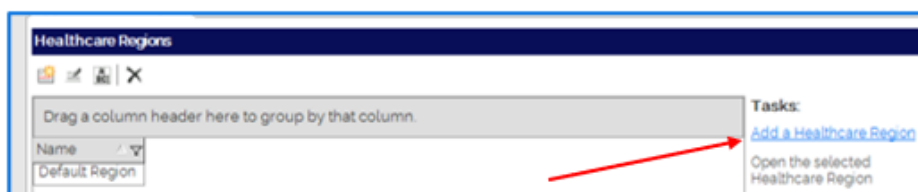
HEALTHCARE REGIONS



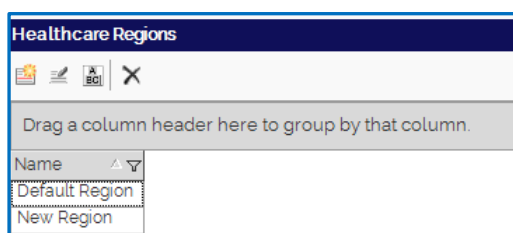
By default, there is a single Region already defined. The name of this region can easily be changed by double-clicking the "Default Region" and changing the name.

To add a new region:

1. Click **Add a Healthcare Region** to create another new region name.



2. Enter the name and click **Save** and **Close** and it will then display (alphanumerically) in the list. This is only necessary if multiple regions are needed to group facilities by regions.



HEALTHCARE FACILITIES

Each hospital or Healthcare Facility (HCF) needs to be defined. If there is only a single facility, it is likely there will only be a single entry. If there are multiple facilities, they can be added and attached to the appropriate Region. There is also an **Order Index** if the display should be anything other than alphabetic.

Application Setup x

Healthcare Facilities

Drag a column header here to group by that column.

Name ▲ ▼	Active ▼	LU HCF Code ▼	Region ▼	Order Index ▼
CH	True	HCF5	Default Region	5
GH	True	HCF6	Default Region	10
MHP	True	HCF7	Default Region	20
NHS	True	HCF8	Default Region	30
SHS	True	HCF4	Default Region	25
UPH	True	HCF2	Default Region	15

Tasks:

- [Add a Healthcare Facility](#)
- Open the selected Healthcare Facility
- Delete the selected Healthcare Facility
- [Refresh List](#)

1. Click **Add a Healthcare Facility** to add a new one.
2. Each of the fields should be addressed except for the two with default entries shown below. The only required field is the Name, but no information will be seen without also having the LU HCF Code defined.

Healthcare Facilities -

Name:

Settings

Active ☐

LU HCF Code

Region

Order Index

Healthcare Facilities

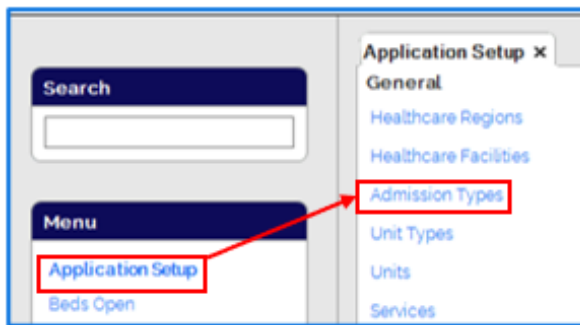
Drag a column header here to group by that column.

Name ▲ ▼	Active ▼	LU HCF Code ▼	Region ▼	Order Index ▼
CH	True	HCF5	Default Region	5
GH	True	HCF6	Default Region	10
MHP	True	HCF7	Default Region	20
NHS	True	HCF8	Default Region	30
SHS	True	HCF4	Default Region	25
UPH	True	HCF2	Default Region	15
zNew	False		New Region	0

Below are the data elements and recommended naming conventions.

- **Name:** Since the Name is what displays on many reports, it is best to use an abbreviation.
- **Active:** Facilities can be defined prior to becoming active if necessary; otherwise set to True by checking the box.
- **LU HCF Code:** This is the code that ties the registration system to Capacity Planner. If information has been received in Capacity Planner, any new facility codes would display in the dropdown. **Note:** If no code is selected, it can be added later. Once a code is selected and saved, it cannot be changed. Contact Support if a change or correction is needed.
- **Region:** "Default Region" will display unless another Region is defined and selected.
- **Order Index:** Set these with some space in between to make it easier to change the sort order if needed. If no changes are made, "0" will display and they sort alphanumerically (as seen above).

ADMISSION TYPES



Admission Types are defined to separate out patients coming into the hospital via Emergency or Urgent Care versus direct admit or transferred in from other facilities.

The two groupings of Admission Types will then be used for long-range planning. They may display with different names that are chosen for each instance of Capacity Planner (same for the entire enterprise). Here are some examples of those master Admission Types:

- Acute and Elective
- Unscheduled and Scheduled
- Emergency and Non-emergent

Admission Types must be defined for each facility using Capacity Planner – even if the choices are standard across the entire Region.

Note: The [master] Admission Type cannot be changed once saved. The entire entry would need to be deleted and recreated. This type of change must be done prior to productive use.

Application Setup x			
Admission Types			
Drag a column header here to group by that column.			
Name	LU Admission Type Code	Admission Type	Healthcare Facility
2 Emergent	2	Unscheduled	UPH
2 Emergent	2	Unscheduled	SHS
2 Emergent	2	Unscheduled	GH
2 Emergent	2	Unscheduled	CH
2 Emergent	2	Unscheduled	MHP
2 Emergent	2	Unscheduled	NHS
3 Urgent	3	Unscheduled	UPH
3 Urgent	3	Unscheduled	SHS
3 Urgent	3	Unscheduled	GH
3 Urgent	3	Unscheduled	MHP
3 Urgent	3	Unscheduled	CH
3 Urgent	3	Unscheduled	NHS
Elective / Scheduled	L	Scheduled	UPH
Elective / Scheduled	L	Scheduled	SHS
Elective / Scheduled	L	Scheduled	GH
Elective / Scheduled	L	Scheduled	CH
Elective / Scheduled	L	Scheduled	MHP
Elective / Scheduled	L	Scheduled	NHS
Newborn	N	Unscheduled	UPH
Newborn	N	Scheduled	SHS
Newborn	N	Scheduled	GH

Tasks:

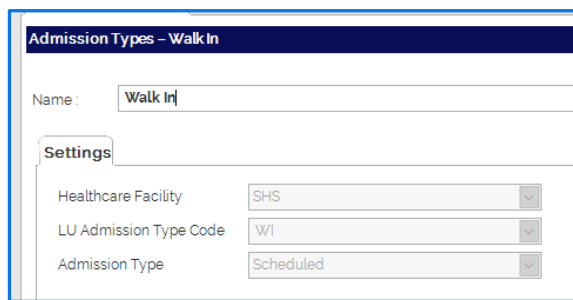
[Add an Admission Type](#)

Open the selected Admission Type

Delete the selected Admission Type

[Refresh List](#)

1. To add a new entry, click **Add an Admission Type**.
2. Enter the **Name**.
3. Choose the **Healthcare Facility** from the dropdown.
4. Choose the **LU Admission Type Code** from the dropdown. This is the code that ties back to the registration or ADT system.
5. Choose the [master] **Admission Type**.
6. Click **Save** and then **Close**.



Admission Types - Walk In

Name:

Settings

Healthcare Facility:

LU Admission Type Code:

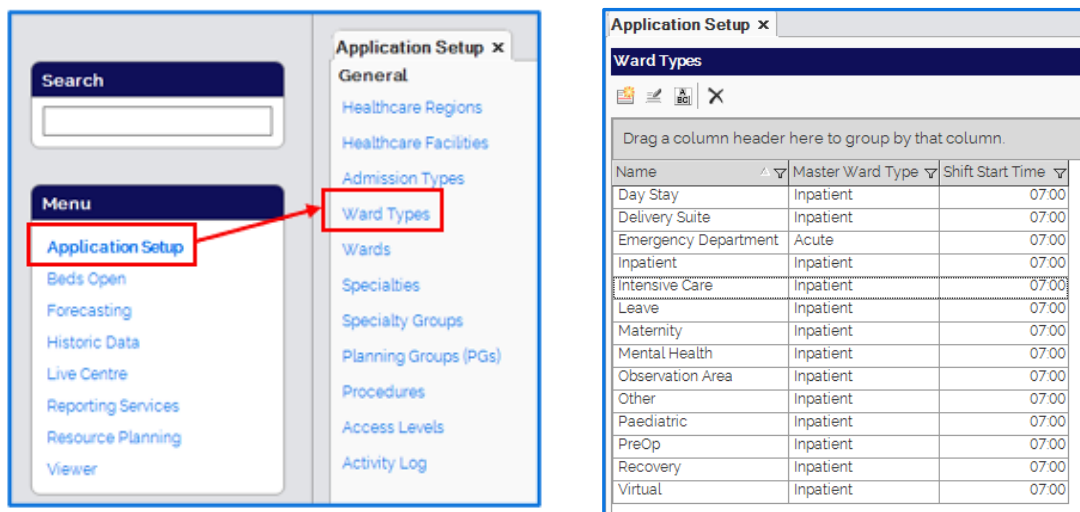
Admission Type:

Note: After saving, the only field that is editable is the Name. The rest is view only. So, if changes are needed, the entry needs to be deleted and recreated correctly. These changes should all be completed prior to productive use. If changes are needed after this time, contact Support prior to deleting any entries.

WARD TYPES

Ward Types are ways to group similar wards or Planning Groups. Each is tied to a **Master Ward Type**. These separate patient volumes in the areas and length of stay tied to each. The naming of these Master Ward Types may vary (e.g., Acute, and Inpatient; Emergency and Inpatient).

There will be several populated by default. **DO NOT DELETE** these! Instead, you can add new Ward Types as needed.



Application Setup x

General

- Healthcare Regions
- Healthcare Facilities
- Admission Types
- Ward Types**
- Wards
- Specialties
- Specialty Groups
- Planning Groups (PGs)
- Procedures
- Access Levels
- Activity Log

Application Setup x

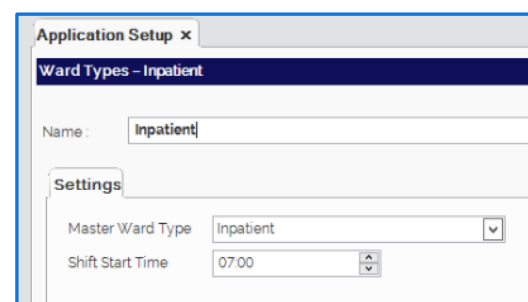
Ward Types

Drag a column header here to group by that column.

Name	Master Ward Type	Shift Start Time
Day Stay	Inpatient	07:00
Delivery Suite	Inpatient	07:00
Emergency Department	Acute	07:00
Inpatient	Inpatient	07:00
Intensive Care	Inpatient	07:00
Leave	Inpatient	07:00
Maternity	Inpatient	07:00
Mental Health	Inpatient	07:00
Observation Area	Inpatient	07:00
Other	Inpatient	07:00
Paediatric	Inpatient	07:00
PreOp	Inpatient	07:00
Recovery	Inpatient	07:00
Virtual	Inpatient	07:00

Each Ward and Planning Group needs to be assigned to one of these Ward Types and each Ward in a Planning Group needs to share the same Ward Type.

1. To add a new entry, click **Add an Ward Type**.
2. Enter the **Name**.
3. Choose the **Master Ward Type** from the dropdown.
4. If the first shift of the day varies from "0700", change in the **Shift Start Time** dropdown.
5. When finished, click **Save** and **Close**.



Application Setup x

Ward Types - Inpatient

Name:

Settings

Master Ward Type:

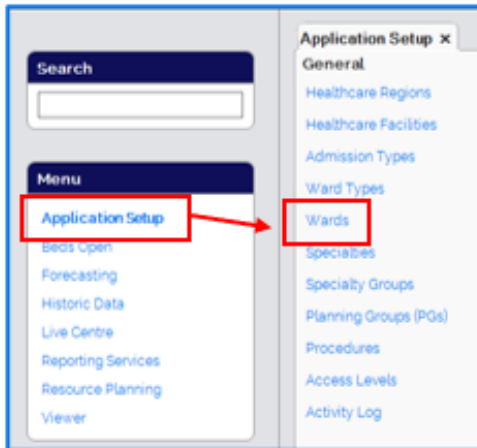
Shift Start Time:

Ward Type Tips:

- If Critical Care wards use some of the same Specialties as others like Medicine or Surgical areas, you may want to create a separate Ward Type for Critical Care. This will allow you to do Forecasting for all the Critical Care volumes instead of including Medicine Critical Care patient volumes in with all other Medicine volumes.
- If mistakes are made, it is better to just add a "z" at the beginning of the name so it would sort to the bottom and not be as visible. Deleting entries may cause issues after productive use.

WARDS

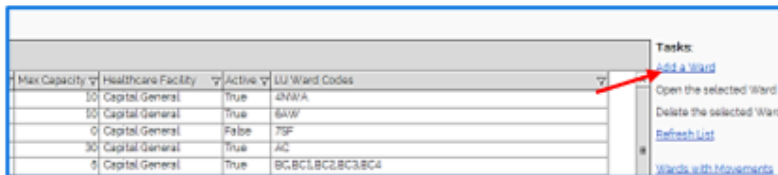
Wards should already be defined but can be edited as needed. This build has several fields, and each will be detailed on the following page.



Application Setup ×						
Wards						
Drag a column header here to group by that column.						
Name	Description	Ward Type	Max Capacity	Healthcare Facility	Active	LU Ward Codes
4 North Ward (Babies)	4 North Ward (Babies)	Virtual	10	Capital General	True	4NWA
6 Annex Ward		Inpatient	10	Capital General	True	6AW
7 South Flexi Ward	7 South Flexi Ward	Other	0	Capital General	False	7SF
AC	AC	Emergency Department	30	Capital General	True	AC
B Corridor	B Corridor	Emergency Department	5	Capital General	True	BC,BC1,BC2,BC3,BC4
B8	B8	Emergency Department	30	Capital General	True	B8
C Corridor	C Corridor	Emergency Department	1	Capital General	True	CC
CAMU		Inpatient	10	Capital General	True	CAM
Cardiac 1	Cardiac 1	Inpatient	37	Capital General	True	6SW
Cardiac 2	Cardiac 2	Inpatient	8	Capital General	True	IRW
CATT	CATT	Emergency Department	30	Capital General	True	CATT
CGH-Delivery Suite	CGH-Delivery Suite	Delivery Suite	17	Capital General	True	DLV
Children's Dayward	Children's Dayward	Day Stay	0	Capital General	True	CDW
Clinical Trials Unit	Clinical Trials Unit	Other	14	Capital General	True	CTR
CMU Treatment Room	CMU Treatment Room	Other	0	Capital General	False	CMU
Coastal Maternity	Coastal Maternity	Maternity	3	Coastal	True	PRM

ADD A WARD

1. To create a new Ward, click **Add a Ward** on the right.



2. Enter the **Name** to be displayed on reports. You may want to use more abbreviated names for better display.
3. The **Description** can be used to include the ward's full name or to track changes (e.g. "Closed Feb 2021").
4. Choose the **Ward Type** that matches the intended Planning Group.
5. Choose the **Healthcare Facility** from the drop down.
6. Enter the total number of physical beds in the **Maximum Capacity** field.
7. Make sure to check the box next to **Active**.

Application Setup ×

Wards – Medical 3

Name : Medical 3

Settings | Ward Roles | Roster Wards | Procedure Groups

Description : Medical 3

Ward Type : Inpatient

Healthcare Facility : Capital General

Maximum Capacity : 12

Active : ☒

LU Ward Code : Add

☐ SSU
☒ W03

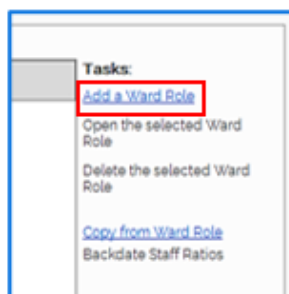
8. Choose the correct **LU Ward Code** that ties this ward to the registration or ADT system. There may be a need to include multiple LU Ward Codes (as shown in the screenshot below). **Note:** If this needs changed after saving, contact Support for assistance.
9. These are the required fields when creating a new ward. Additional fields for staffing are outlined on the following page.

WARD ROLES

ADD A WARD ROLE

For those including staffing in Capacity Planner, the following tabs need defined for each ward.

1. Open the **Ward Roles** tab for the ward and click **Add a Ward Role** on the right.



2. Choose the **Role** from the dropdown.
3. The **Staff Available** and **Budgeted HPPD** fields are optional (as they do not have any true impact on staffing).
 - a. **Tip:** Customers have used the Staff Available to reflect the Max Capacity to use as a reference when copying from one ward to another.
4. Choose either “Planned Bed Ratio” or “Patient Activity Ratio” in the **Staff Calculation Method** dropdown. **Note:** Using ‘Patient Activity Ratio’ provides more reporting opportunities.

SHIFTS

1. Next, open the **Shifts** tab.
2. Click **Add a Shift** on the right. [Add a Shift](#)
3. Enter either a **Name** for the shift or the start and stop times (e.g. “0730-1945”)
4. Enter the **Start Time** and **End Time** for the shift.
5. Be sure to enter the number of **Non-Productive Minutes** for more accurate reporting.

Name	Start Time	End Time	Non-Productive Minutes
D12	07:30	19:45	30
N12	19:30	07:45	30

6. Click **Save** and **Close** when finished.
7. Repeat these steps for each additional shift that staff with this role work.

PLANNED BED RATIOS

1. Click the **Planned Bed Ratios** tab to define the staffing ratios for this role.

Units - 3NIMED - NURSE

Name: NURSE

Settings Shifts **Planned Bed Ratios** Patient Activity Ratios

Drag a column header here to group by that column.

Beds Open From	Beds Open Up To	Weekday	07:30-19:45	19:30-07:45
0	0	All	0	0
1	6	All	2	3
7	10	All	3	3
11	15	All	3	4
15	17	All	4	5

Tasks:

- Add a Planned Bed Ratio**
- Open the selected Planned Bed Ratio
- Delete the selected Planned Bed Ratio

2. Be sure to include a row that shows **Beds Open From** and **Beds Open Up To** both as "0". This way, if there are no patients, the reports will reflect no staff are needed and the ward can be closed.
3. Click **Add a Planned Bed Ratio** on the right to add more levels. A separate entry is needed at any patient census level where the number of staff are different for any shift defined.

PATIENT ACTIVITY RATIOS

1. After all the Shifts and Planned Bed Ratios are defined, click the **Patient Activity Ratios** tab.
2. Click **Generate Patient Activity Ratios** on the right if any changes are made to the Planned Bed Ratios.
3. Two messages will display. Click **Yes** and **OK**.

Units - 3NIMED - NURSE

Name: NURSE

Settings Shifts Planned Bed Ratios **Patient Activity Ratios**

Drag a column header here to group by that column.

Name	Shift	Weekday	Start Time	Finish Time	Mins / Unscheduled Admission
Auto generated	D12	All	07:30	19:45	0.00
Auto generated	N12	All	19:30	07:45	0.00

Tasks:

- Add a Patient Activity Ratio**
- Open the selected Patient Activity Ratio
- Delete the selected Patient Activity Ratio
- Generate Patient Activity Ratios**

Delete existing Patient Activity Ratios

There are existing Patient Activity Ratios for this unit and role which will be deleted. Would you like to continue?

Yes No

Success

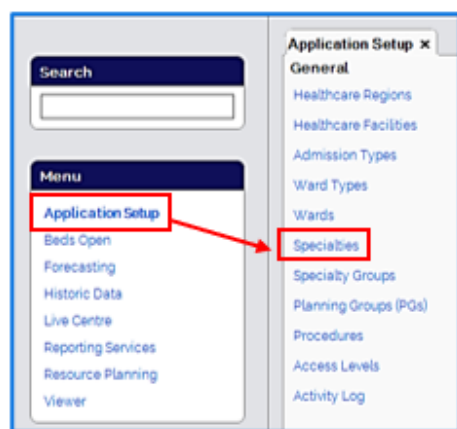
Patient Activity Ratios successfully generated from the selected Planned Bed Ratios.

OK

4. Repeat each of the steps above for each different role and be sure to click **Save** and **Close** on each page as you build to make sure not to lose any changes.

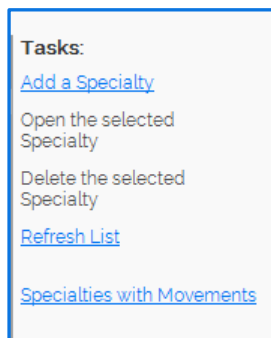
SPECIALTIES

Specialties are populated from patient assignments in the ADT or registration system. The codes for these will come into Capacity Planner automatically but need to be defined and then mapped to Specialty Groups and Planning Groups. These Specialties are used to display census and activity on reports.



Application Setup x			
Specialties			
Drag a column header here to group by that column.			
Name	Healthcare Facility	LU Specialty Codes	Replace projections with Theatre bookings
Anaesthesiology	Princess Mary Hospital	S05	☐
Anaesthesiology	Capital General	S05	☐
ATR Geniatric	Princess Mary Hospital	D01	☐
ATR Geniatric	Capital General	D01	☐
ATR Phys/Disability	Princess Mary Hospital	D41	☐
ATR Phys/Disability	Capital General	D41	☐
ATR Psychogeriatric	Capital General	D21	☐
ATR Psychogeriatric	Princess Mary Hospital	D21	☐
Card - Angiogram	Capital General	BS2	☐
Card - EP	Capital General	BE2	☐
Card - Pacing	Capital General	BE1	☐
Card - PCI	Capital General	BS1	☐
Card - PTCA	Capital General	BS1	☐
Cardio Aortic Stenosis	Capital General	BS4	☐

1. To add a new Specialty, click **Add a Specialty** on the right.



Specialties - Cardiology

Name :

Settings | Procedure Groups

Healthcare Facility:

Replace projections with Theatre bookings: ☐

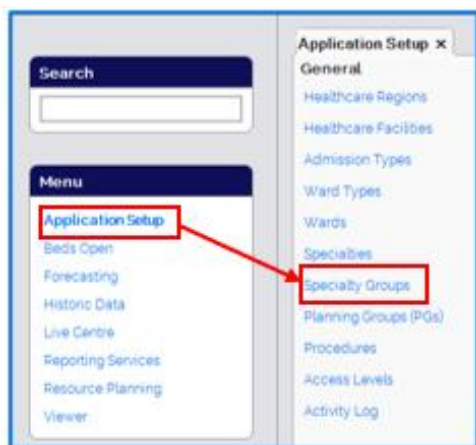
LU Specialty Code:

2. Enter the **Name** for the new Specialty.
3. Select the **Healthcare Facility** from the dropdown.
4. Check the appropriate **LU Specialty Code** (the code that identifies the specialty in the ADT system) and click **Save** and **Close** when finished.

SPECIALTY GROUPS

After a new Specialty is defined, it needs to be added to a Specialty Group. Specialty Groups allow streamlining report and Planning Group setup. Specialties should be grouped according to how patients are cared for in the hospital (e.g., Medicine patients go to the same units, cared for by the same nursing staff).

Specialty Groups often match Planning Groups, but there can be multiple Specialty Groups in a Planning Group if needed.



1. To add a new Specialty to an existing group, double-click the Specialty Group from the listing.

 A screenshot of the 'Specialty Groups' list in the 'Application Setup' window. The list has columns for Name, Healthcare Facility, and Order Index.

Name	Healthcare Facility	Order Index
Cardiac	Capital General	4
ICU	Capital General	5
Keneperu HOP	Princess Mary Hospital	11
Keneperu Surgical	Princess Mary Hospital	12
Maternity	Capital General	6
Medical	Capital General	1
Mental Health	Capital Mental Health	13
NICU	Capital General	7
Oncology	Capital General	3
Paediatrics	Capital General	8
Surgical	Capital General	2

2. Click the Specialties tab, select the new Specialty, and click **Save** when finished.
3. This is also where you can remove a specialty by unchecking the box next to the choice.

 A screenshot of the 'Specialty Groups - Cardiac' form in the 'Application Setup' window. The 'Name' field is set to 'Cardiac'. The 'Specialties' tab is selected, showing a list of specialties with checkboxes.

Specialty	Selected
Anaesthesiology	☐
ATR Geriatric	☐
ATR Phys./Disability	☐
ATR Psychogeriatric	☐
Card - Angiogram	☒
Card - EP	☐
Card - Pacing	☐
Card - PCI	☐
Card - PTCA	☒
Cardio Aortic Stenos	☐
Cardio Aortic Valve	☒
Cardio CABG	☒
Cardio Mitral Stenos	☒
Cardiology	☒
Cardiothoracic Surge	☒
Cardiothoracic Surgery	☒
Dental Surgery	☐

- To add a new Specialty Group, click **Add a Specialty Group** on the right.

Tasks:

[Add a Specialty Group](#)

Open the selected Specialty Group

Delete the selected Specialty Group

[Refresh List](#)

- Enter the **Name** and select the appropriate **Healthcare Facility** from the dropdown.

Application Setup x

Specialty Groups – Cardiac

Name :

Settings **Specialties**

Healthcare Facility ▼

Order Index ▼

- For each facility, the order Specialty Groups display on some reports is determined by the **Order Index**. Since new groups may be added at any time, it is recommended that they be spaced out with room to add new ones in between without having to change the order of other groups.

Note: Each specialty can be attached to only a single group for each facility.

PLANNING GROUPS (PGS)

Planning Groups are a way to group like-wards that may share patients and/or staff.

Search

Menu

- Application Setup**
- Beds Open
- Forecasting
- Historic Data
- Live Centre
- Reporting Services
- Resource Planning
- Viewer

Application Setup x

General

- Healthcare Regions
- Healthcare Facilities
- Admission Types
- Ward Types
- Wards
- Specialties
- Specialty Groups
- Planning Groups (PGs)**
- Procedures
- Access Levels
- Activity Log

- To create a new entry, click **Add a Planning Group (PG)** on the right.

Tasks:

[Add a Planning Group \(PG\)](#)

Open the selected Planning Group (PG)

Delete the selected Planning Group (PG)

[Refresh List](#)

- Enter the **Name** (abbreviation) and **Description** (can be a longer name). If appropriate, have the Name match that of the corresponding Specialty Group name.

3. Choose the **Ward Type** from the dropdown.

- a. **Note:** Emergency PGs must have a different Ward Type than inpatient ones.

4. Choose the **Healthcare Facility** from the dropdown.
5. Check the box for **Allow Elective Forecasting** for inpatient PGs with elective patients.
6. For PGs without any Beds Open defined (e.g. Assessment or Emergency PGs) that still need to be included in Projections, check the box for **Retain projections when Beds Open = 0**. **Note:** this is not used for most PGs.
7. Select the **Order Index** that should be used on reports. Leave space between entries.
8. Select the **Display Colour** that will represent this PG's Specialties on the Hospital Status report. **Note:** Each PG for a facility should be different colour.
9. The next step is to select the **Specialties** tab to assign the appropriate specialties for patients in the PG. To include all specialties in a group, just select the group (see "Cardiac" in the example below). **Note:** Each Specialty Group can be attached to only one PG with the same Ward Type. For example, if "Cardiac" is selected for this PG, it cannot also be attached to any other PGs with a Ward Type of "Inpatient" (like Medicine).

10. The last step before saving is to click the **Wards** tab so the appropriate wards are selected. Only those with the same Ward Type and not assigned to other PGs will display.

11. To make a change to an existing Planning Group, double-click the one to change and edit as needed.

Planning Groups (PGs)								
Drag a column header here to group by that column.								
Name	Description	Ward Type	Healthcare Facility	Over Resourced %	Under Resourced %	Allow Elective Forecasting	Retain projections when Beds Open	
Acute MH 1	Acute MH 1	Mental Health	Hillview Hospital	0%	0%	True	True	
Cardiac	Cardiac	Inpatient	Capital General	0%	0%	True	True	
Coastal Maternity	Coastal Maternity	Maternity	Coastal	0%	0%	True	True	
Delivery Suite	Delivery Suite	Delivery Suite	Capital General	0%	0%	True	True	
ED	ED	Emergency Department	Capital General	0%	0%	True	True	
ED Observation	ED Observation	Observation Area	Capital General	0%	0%	True	True	
Hillview Forensic	Hillview Forensic	Mental Health	Hillview Hospital	0%	0%	True	True	
HV Mental Health	Mental Health	Mental Health	Hillview Hospital	0%	0%	True	True	
ICU	ICU	Intensive Care	Capital General	0%	0%	True	True	
Medical	Medical	Inpatient	Capital General	0%	0%	True	True	
Mental Health	Mental Health	Mental Health	Capital Mental Health	0%	0%	True	True	
NICU	NICU	Intensive Care	Capital General	0%	0%	True	True	
Observation	Observation	Inpatient	Hillview Hospital	0%	0%	True	True	
Older Persons Psyc	Older Persons Psyc	Inpatient	Princess Mary Hospital	0%	0%	True	True	
Oncology	Oncology	Inpatient	Capital General	0%	0%	True	True	
Paediatrics	Paediatrics	Paediatric	Capital General	0%	0%	True	True	
PM Mental Health	PMH Mental Health	Inpatient	Princess Mary Hospital	0%	0%	True	True	
PM Surgical	Surgical	Inpatient	Princess Mary Hospital	0%	0%	True	True	
PMH Maternity	PMH Maternity	Maternity	Princess Mary Hospital	0%	0%	True	True	
SAU	SAU	Day Stay	Capital General	0%	0%	True	True	

PROCEDURES

No longer used.

ACCESS LEVELS

There are three pre-defined Access Levels that cover the main user groupings. Other entries can be added if needed (e.g., to limit access to other facilities). These each control which features are accessible by users.

The screenshot shows the 'Application Setup' window with a menu on the left and a list of options on the right. 'Access Levels' is highlighted in the right-hand list. A red arrow points from the 'Access Levels' option in the menu to the 'Access Levels' option in the right-hand list. Below this, a detailed view of the 'Access Levels' table is shown.

Name	Description
Administrator	The default administrator access level
Operator	The default operator access level
Planner	The default planner access level

1. To make changes to existing Access Levels, double-click the one to be changed.
2. To add new, click **Add an Access Level** on the right.

The screenshot shows the 'Tasks' panel on the left with the 'Add an Access Level' link highlighted. To the right is the 'Access Level' form.

Tasks:

- [Add an Access Level](#)
- Open the selected Access Level
- Delete the selected Access Level
- [Refresh List](#)

Access Level Form:

Name:

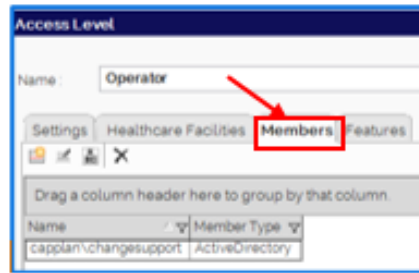
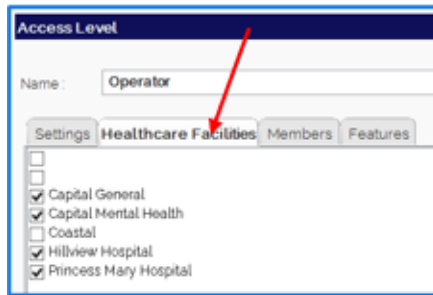
Settings: Healthcare Facilities | Members | Features

Description:

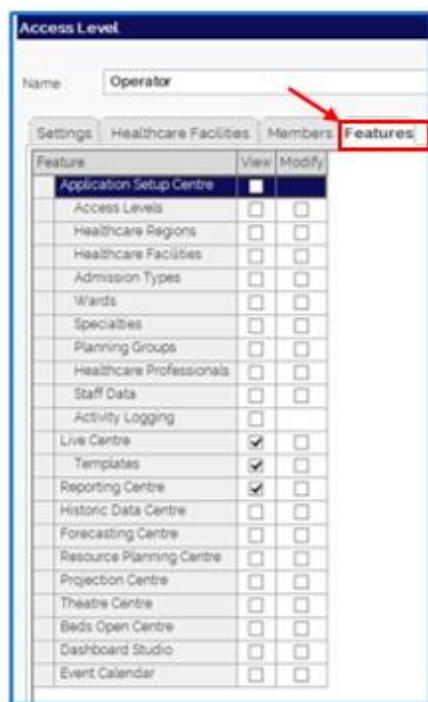
3. If creating new, you may want to enter a brief **Description** to identify the differences and the **Name** should reflect any facility restrictions if for a single facility.

Capacity Planner (Thick Client)

- Click the **Healthcare Facilities** tab to add or change the facilities included for access.



- Click the **Members** tab if needing to remove a group from an Access Level (rare). **Note:** This is generally all managed within Active Directory. The Name of the Access level is provided to those to map users to that Access Level and what displays on the Members tab are the Active Directory Group(s) linked to the Access Level.
- Next, click the **Features** tab to view or edit any permissions to features. There are two choices – ‘View’ or ‘Modify’.

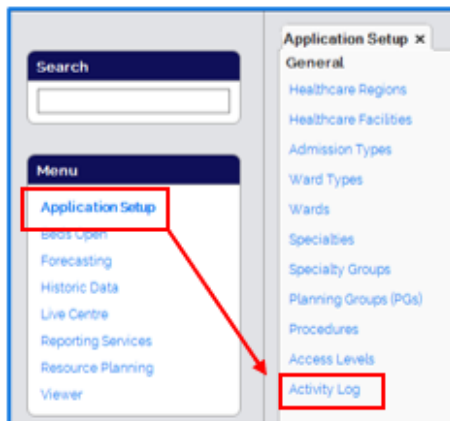


Cautions: One of the most impactful choices shown above is “Reporting Centre”. Here are some tips to help with this feature.

Setting	Impact
None	On Demand Reports are not even listed in the "Reporting" dropdown, and Report Groups and Dashboards cause an Error loading reports message.
View	Users can view Report Groups, Dashboards and On Demand Report, but cannot create or edit their own.
View and Modify	Users can view, edit, and even delete System Groups for both Report Groups and Dashboards -- not just those they created. A warning will display but will not prevent users from removing groups from view for others.

ACTIVITY LOG

The Activity Log is used to search for changes made to the build. The results of any search will display when a change was made, who made the change, where in the application it was made and, in some cases, it will also add more information as to the data that was changed.



Each column of the results can be filtered to limit the results a bit more.

Application Setup x

View an activity log of data items that have been added, changed or deleted within the Planner for a selected date range and specified item types.

Date Range: 04/13/2020 - 04/14/2021

Features:

- ☒ (Select All)
- ☒ Access Levels
- ☒ Activities
- ☒ Admission Types
- ☒ Application Settings
- ☒ Beds Open
- ☒ Care Paths
- ☒ Contracts
- ☒ Dashboard Templates
- ☒ Dashboards
- ☒ Data Exports
- ☒ Distributions
- ☒ Event Calendar
- ☒ Forecasting
- ☒ HCP Availability Cycles
- ☒ Healthcare Facilities
- ☒ Healthcare Professionals
- ☒ Healthcare Regions
- ☒ Historic Data
- ☒ Metric View Templates
- ☒ Metric Views

View Logs

Drag a column header here to group by that column.

Date Time	User	Application	Activity	Item Type	Healthcare Facility	Item Name	Data
05/03/2021 15:41	CAPPLAN\vnzcpuser	Planner	Update	Planning Groups	Capital General	Medical	Wards
05/03/2021 15:36	CAPPLAN\vnzcpuser	Planner	Update	Planning Groups	Capital General	Medical	Wards
05/03/2021 15:25	CAPPLAN\vnzcpuser	Planner	Delete	Planning Groups	Capital General	Other	
05/03/2021 15:05	CAPPLAN\vnzcpuser	Planner	Create	Planning Groups	Capital General	Other	
05/03/2021 15:04	CAPPLAN\vnzcpuser	Planner	Update	Planning Groups	Capital General	Medical	Wards
26/01/2021 12:03	CAPPLAN\vnzcpuser	Planner	Update	Forecasting	Capital General	Medical	Acute Part, R
28/01/2021 12:03	CAPPLAN\vnzcpuser	Planner	Update	Forecasting	Capital General	Medical	Elective Part,
13/01/2021 11:50	CAPPLAN\vnzcpuser	Planner	Delete	Healthcare Regions	N/A	My Region	
13/01/2021 11:49	CAPPLAN\vnzcpuser	Planner	Create	Healthcare Regions	N/A	My Region	
12/01/2021 15:16	CAPPLAN\vnzcpuser	Planner	Update	Specialties	Capital General	Card - Angiogram	
12/01/2021 15:16	CAPPLAN\vnzcpuser	Planner	Update	Specialties	Capital General	ATR Phys/Disability	
12/01/2021 15:16	CAPPLAN\vnzcpuser	Planner	Update	Specialties	Princess Mary Hospital	ATR Geriatric	
12/01/2021 15:16	CAPPLAN\vnzcpuser	Planner	Update	Specialties	Capital General	Card - Angiogram	
12/01/2021 15:16	CAPPLAN\vnzcpuser	Planner	Update	Specialties	Capital General	ATR Phys/Disability	
12/01/2021 15:16	CAPPLAN\vnzcpuser	Planner	Update	Specialties	Princess Mary Hospital	ATR Geriatric	
03/12/2020 14:05	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	Medical	Annual
03/12/2020 14:05	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	Oncology	Annual
03/12/2020 14:04	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Set)	Capital General	Medical 6	Roster
03/12/2020 14:04	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Set)	Capital General	Medical 5	Roster
03/12/2020 14:04	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Set)	Capital General	Medical 3	Roster
03/12/2020 14:04	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Set)	Capital General	MAPU	Roster
03/12/2020 13:57	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	ED	Annual
03/12/2020 13:57	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	Medical	Annual
03/12/2020 13:56	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	ED	Annual
03/12/2020 13:56	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	Medical	Annual
03/12/2020 13:56	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	Oncology	Annual
03/12/2020 12:44	CAPPLAN\vnzcpuser	Planner	Update	Forecasting	Capital General	Medical	Acute Part, A
03/12/2020 12:44	CAPPLAN\vnzcpuser	Planner	Update	Forecasting	Capital General	Medical	Elective Part,
03/12/2020 12:41	CAPPLAN\vnzcpuser	Planner	Update	Forecasting	Capital General	Medical	Acute Part, A
03/12/2020 12:41	CAPPLAN\vnzcpuser	Planner	Update	Forecasting	Capital General	Medical	Elective Part,
03/12/2020 12:30	CAPPLAN\vnzcpuser	Planner	Update	Forecasting	Capital General	Medical	Acute Part, A
03/12/2020 12:30	CAPPLAN\vnzcpuser	Planner	Update	Forecasting	Capital General	Medical	Elective Part,
03/12/2020 11:42	CAPPLAN\vnzcpuser	Planner	Update	Forecasting	Capital General	Medical	Acute Part, R
03/12/2020 11:42	CAPPLAN\vnzcpuser	Planner	Update	Forecasting	Capital General	Medical	Elective Part,
18/11/2020 22:02	CAPPLAN\vmcksup	Viewer	Update	Dashboards	N/A	\01 Today Ward View\01 Hospital Wards Today	Dashboard It
22/09/2020 11:32	CAPPLAN\vnzcpuser	Planner	Update	Wards	Capital General	6 Annex Ward	Ward Roles, f
08/09/2020 20:06	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	Medical	Roster
08/09/2020 20:05	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	Surgical	Roster
08/09/2020 19:38	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	Oncology	Roster
08/09/2020 19:37	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	Cardiac	Roster
08/09/2020 19:36	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	Surgical	Roster
08/09/2020 19:36	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Planned)	Capital General	Medical	Roster
08/09/2020 19:27	CAPPLAN\vnzcpuser	Planner	Update	Resource Planning (Beds Set)	Capital General	Maternity Ward	Annual

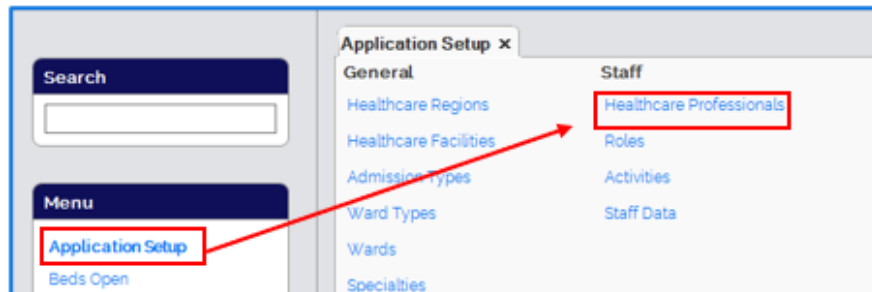
Close

APPLICATION SETUP – STAFF

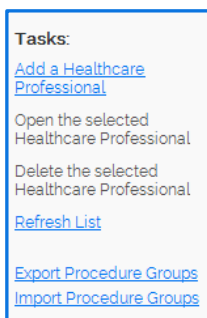
Under the **Staff** header are all the tables that control staffing resources.

HEALTHCARE PROFESSIONALS

The first one is **Healthcare Professionals** and should generally reflect Attending Physicians or practitioners responsible for a patient's care throughout their stay.



1. If displaying Healthcare Professionals (HCP) on Metric Views, these should be kept up to date. (Note: If not displaying HCP on Metric Views, no intervention is necessary.)
2. To add a new HCP, click **Add a Healthcare Professional** on the right.



3. From here, enter the **Surname** of the HCP. (**Note:** Recommend entering name that would display in a metric view, e.g., STEVENS, MARK A. This way, you have the ability to sort by HCP last names.)

4. The other fields that are required are **Healthcare Facility**, **LU HCP Code** (unique identifier in the ADT or registration system) and the **Active** checkbox. All other fields on this tab are optional.

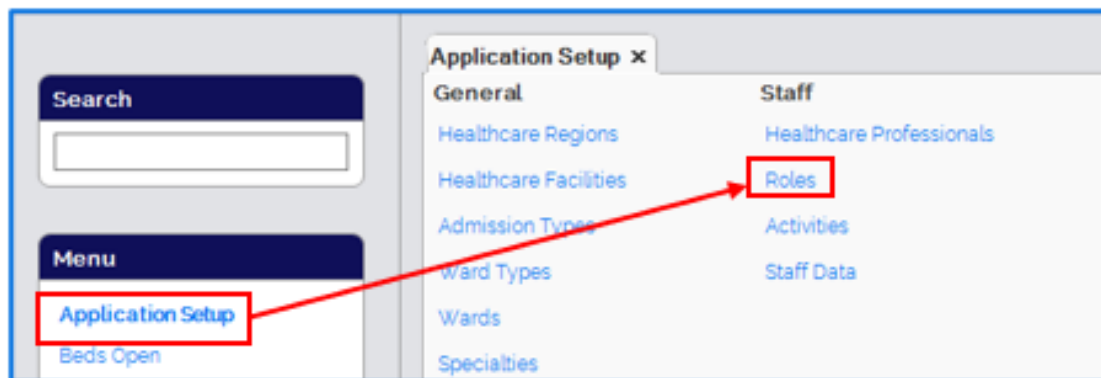
- Next, select the **Specialties** tab to select their primary specialty. Do not select multiples.

- Note:** If HCP has privileges at multiple facilities, they will need to be added for each one separately.
- Click **Save** and **Close** when finished.
- Below are a couple examples. The first shows recommended entries for those displaying HCP names in Metric Views. The second shows a listing just displaying their unique identifiers as the names.

Name	Title	Firstname	Initials	Gender	HCP Type	Healthcare Facility	LU HCP Code	Level	FTE	Availability Cycle	Active
Evan, Michael B.				Unknown	Clinicians	UPH	3		0.0		True
Evan, Michael B.				Unknown	Clinicians	SHS	4		0.0		True
Evan, Stephen				Unknown	Clinicians	MHP	5		0.0		True
Huang, P.				Unknown	Clinicians	NHS	6		0.0		True
Stevens, Mark A.				Unknown	Clinicians	CH	1		0.0		True
Williams, Mary R.				Unknown	Clinicians	GH	2		0.0		True

Name	Title	Firstname	Initials	Gender	HCP Type	Healthcare Facility	LU HCP Code	Level	FTE	Availability Cycle	Active
3634				Unknown	Clinicians	Capital General	3634		0.0		True
364				Unknown	Clinicians	Capital General	364		0.0		True
3645				Unknown	Clinicians	Capital General	3645		0.0		True
3651				Unknown	Clinicians	Princess Mary Hospital	3651		0.0		True
3651				Unknown	Clinicians	Capital General	3651		0.0		True
3657				Unknown	Clinicians	Capital General	3657		0.0		True
3665				Unknown	Clinicians	Hillview Hospital	3665		0.0		True
368				Unknown	Clinicians	Capital General	368		0.0		True
368				Unknown	Clinicians	Princess Mary Hospital	368		0.0		True
3682				Unknown	Clinicians	Princess Mary Hospital	3682		0.0		True
3682				Unknown	Clinicians	Capital General	3682		0.0		True
3688				Unknown	Clinicians	Capital Mental Health	3688		0.0		True
3771				Unknown	Clinicians	Capital Mental Health	3771		0.0		True
379				Unknown	Clinicians	Princess Mary Hospital	379		0.0		True
379				Unknown	Clinicians	Capital General	379		0.0		True
3882				Unknown	Clinicians	Coastal	3882		0.0		True
3882				Unknown	Clinicians	Capital General	3882		0.0		True
389				Unknown	Clinicians	Capital General	389		0.0		True
3897				Unknown	Clinicians	Capital General	3897		0.0		True
3899				Unknown	Clinicians	Princess Mary Hospital	3899		0.0		True

ROLES



The next table in the list under Staff is **Roles**. This is where each different Role is defined. This is an enterprise-wide table, so there should not be separate listings for each facility.

1. To create a new role, click **Add a Role** on the right.

Name	Hours Per Shift	Shifts Per Week	Shifts Annual Leave / Year	Shifts Study Leave / Year
CRN	12.00	0.00	0.00	0.00
HCA	8.00	5.00	0.00	0.00
LPN	8.00	0.00	0.00	0.00
NA	8.00	0.00	0.00	0.00
NC	12.00	0.00	0.00	0.00
NP	8.00	0.00	0.00	0.00
NURSE	12.00	4.00	0.00	0.00
PHY	8.00	0.00	0.00	0.00
RA	8.00	0.00	0.00	0.00
RPN	8.00	5.00	0.00	0.00
TA	8.00	0.00	0.00	0.00
UA	12.00	0.00	0.00	0.00
UC	8.00	5.00	0.00	0.00

Tasks:

- [Add a Role](#)
- Open the selected Role
- Delete the selected Role
- [Refresh List](#)

2. Next, enter the name or widely-known abbreviation for the role in the **Name** field.

Roles - NURSE

Name:

Settings | Roster Roles

Hours per Shift	12.00
Shifts per Week	0.00
Shifts of Annual Leave per Year	0.00
Shifts of Study Leave per Year	0.00
Shifts of Backlog Leave per Year	0.00
Shifts of Public Holidays per Year	0.00
Shifts of Sick Leave per Year	0.00
Shifts of Parental Leave per Year	0.00
Percent of Sick Leave Used	0

3. The only other field that needs to be addressed on this tab is the **Hours per Shift**. It does not need to be the same for all areas with this role, but it does need to be populated.
4. **Note:** If using ANSOS, it is best to have any nursing roles defined separately (instead of combining RN and LPN into a single role named 'NURSE'). Otherwise, the projected staff requirements may send over duplicate needs to ANSOS – same for both RN and LPN Skills.
5. Next, select the **Roster Roles** tab. This is where the individual role identifiers are added.

6. Click **Add a Roster Role** on the right.

Roles - NURSE

Name:

Settings **Roster Roles**

Drag a column header here to group by that column.

Name	Healthcare Facility
30000423	UPH
30000429	UPH
30000436	UPH
30000452	UPH
30003105	NHS
30003107	NHS
30003278	GH
30003401	CH
30003404	CH
30003638	MHP
30003643	MHP
30004836	SHS
30004840	SHS

Tasks:

- Add a Roster Role**
- Open the selected Roster Role
- Delete the selected Roster Role

7. Choose the **Healthcare Facility** from the dropdown.

Roles - NURSE

Name:

Settings

Healthcare Facility

LU Code

- CH
- GH
- MHP
- NHS
- SHS
- UPH

8. Next, choose the **LU Code** that links back to the staffing application. This may be known as a Job Code or for ANSOS, it is a combination of Division and Skill Code. **Note:** There may be multiple selections for each facility.

Roles - NURSE

Name:

Settings

Healthcare Facility

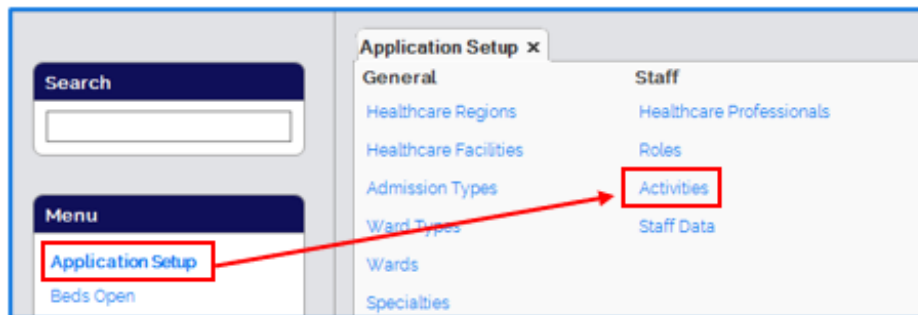
LU Code

- 30002402
- 30002663
- 30003225
- 30003228
- 30003231
- 30003244
- 30003275

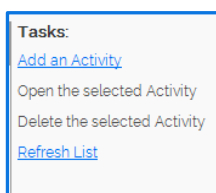
9. This is also an easy place to make changes to existing roles (e.g., add or remove a LU Code).
10. Click **Save** and **Close**. When finished and repeat for any additional roles.

ACTIVITIES

The next table under Staff is the Activities table. This is where both productive and non-productive activities are defined (e.g., Pay Code or Workshift Codes). Some entries will default in and can be utilized. Like the Roles table, these are enterprise-wide and do not need listed separately by facility.



1. For a new entry, click **Add an Activity** on the right.



2. Enter the **Name** of the activity and then add a **Description**.
3. If this is an activity that is scheduled, check the box for **Roster Activity**.
4. Next, choose a [master] **Activity Type** from the dropdown. Each Activity must fall under one of these types.

5. Then, check the box next to **Productive** if it should be counted in the scheduled times and displayed on reports.
Note: Do not check the box for things like Leave or Non-Work activities.

6. Next, select the **Roster Activities** tab on the right.

Tasks:

[Add a Roster Activity](#)

Open the selected Roster Activity

Delete the selected Roster Activity

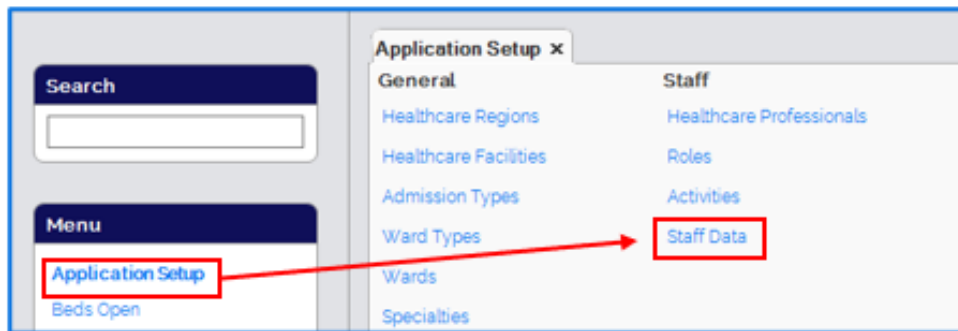
7. From here, select the **Healthcare Facility** from the dropdown.
8. Next, choose the **LU Code** that identifies this activity from the dropdown. There may be multiple choices for each activity defined. Each one will need to be added separately, but multiple choices can be selected.

9. Be sure to click **Save** and **Close** and then repeat for any additional codes.

Activities					
Drag a column header here to group by that column.					
Name	Description	Roster Activity	Activity Type	Productive	
Admin	Admin tasks	True	Non-Work	False	
Annual Leave	Full shift	True	Non-Work	False	
Available	Employee is available to work	True	Non-Work	False	
Bereavement Leave	Full shift	True	Non-Work	False	
Break	Lunch breaks, etc - within the working shift	True	Non-Work	False	
Clinical	Normal patient care	True	Patient Care Work	True	
Coordination	Management tasks	True	Non-Work	False	
Meeting	Meeting on site - during working shift	True	Non-Work	False	
Orientation	Support new staff	True	Non-Work	False	
OT	Scheduled as Overtime	True	Work	True	
Parental Leave	Full shift	True	Non-Work	False	
Patient Transfer	Transfer patient to other area/hospital	True	Work	True	
Sick Leave	Full shift	True	Non-Work	False	
Study Leave	Full shift	True	Non-Work	False	
Watch	1:1 patient watch	True	Patient Care Work	True	

STAFF DATA

Staff Data is an alternate location to map LU Codes for Roles, Activities or Cost Centres. It is also where Admins can troubleshoot build or staffing numbers on reports further.



VIEW STAFF ALLOCATIONS

The staffing information coming into Capacity Planner displays by default showing the last 4 weeks Actual data. This page can be sorted or filtered by any of the columns displayed.

- The **Date Range** can also be changed to look in the past or the future as needed.
- Select **Rostered** to see future scheduled information.
- Click **Extract Data** if any changes have been made to display the new date range.

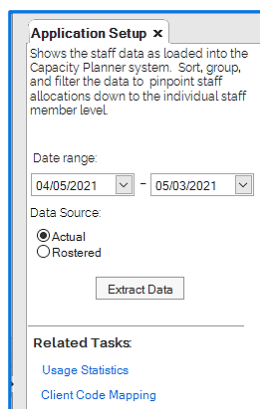
Application Setup x												
Shows the staff data as loaded into the Capacity Planner system. Sort, group, and filter the data to pinpoint staff allocations down to the individual staff member level.												
Drag a column header here to group by that column.												
Staff Count	Healthcare Facility	Unit	Role	Activity	CapPlan Unit	CapPlan Role	CapPlan Activity	Start	Duration	End		
1	GH	186	30003278		HPAL	NURSE	Clinical	2021/04/05 03:00	00:54	2021/04/05 03:54		
1	UPH	38	30000140		9NMH	UA	Clinical	2021/04/05 06:00	07:45	2021/04/05 14:15		
1	UPH	199	30000436		LDW/H	NURSE	Clinical	2021/04/05 06:30	07:45	2021/04/05 14:45		
1	UPH	29	30001247		7WCH	CRN	Clinical	2021/04/05 06:30	07:45	2021/04/05 14:45		
1	UPH	38	30000140		9NMH	UA	Clinical	2021/04/05 06:45	05:00	2021/04/05 11:45		
1	UPH	199	30000143		LDW/H	0	Clinical	2021/04/05 07:00	07:45	2021/04/05 15:15		
7	UPH	5	30000436		5ESUR	NURSE	Clinical	2021/04/05 07:00	11:37	2021/04/05 19:15		
1	UPH	10	30000423		5NSUR	NURSE	Clinical	2021/04/05 07:00	11:37	2021/04/05 19:15		
6	UPH	10	30000436		5NSUR	NURSE	Clinical	2021/04/05 07:00	11:37	2021/04/05 19:15		
5	UPH	11	30000436		5WSUR	NURSE	Clinical	2021/04/05 07:00	11:37	2021/04/05 19:15		
6	UPH	13	30000436		6ESUR	NURSE	Clinical	2021/04/05 07:00	11:37	2021/04/05 19:15		
6	UPH	14	30000436		6WSUR	NURSE	Clinical	2021/04/05 07:00	11:37	2021/04/05 19:15		
7	UPH	15	30000436		6SSUR	NURSE	Clinical	2021/04/05 07:00	11:37	2021/04/05 19:15		
1	UPH	17	30000436		6NSUR	NURSE	Clinical	2021/04/05 07:00	07:45	2021/04/05 15:15		
2	UPH	17	30000423		6NSUR	NURSE	Clinical	2021/04/05 07:00	11:37	2021/04/05 19:15		

- The first column may show "Staff Count" (see above) or if individual staff IDs are being sent, the first column would display as "Individual" (as shown below).

CLIENT CODE MAPPING

This section allows mapping Cost Centres, Roles and Activities using more of a 'drag-and-drop' method (multiples at one time).

1. Click **Client Code Mapping** on the left.



Capacity Planner (Thick Client)

- Choose the **Data Type** to be mapped (Activity, Role or Ward), choose the **Healthcare Facility** and then click **Show Mappings**.

Application Setup x

This page provides a mechanism for mapping the codes used in a client rostering system to the code used in Capacity Planner. Select the type of code to map (Activity, Role, or Unit) and then drag the client codes to and from the un-allocated list into the appropriate Capacity Planner code. Note that clicking 'Save' will save changes to all of the mapping types as a group.

Data Type:

☒ Activity
☐ Role
☐ Unit

Show Mappings

Healthcare Facility:

CH

Allocated Client Codes:

- Any unmapped codes display under “Unallocated Client Codes” on the right.
- To map any codes to a Data Type, select it, drag from Unallocated column, and drop it to where it should be mapped.
- Click the + sign to expand any of the Allocated Client Codes.

Application Setup x

This page provides a mechanism for mapping the codes used in a client rostering system to the code used in Capacity Planner. Select the type of code to map (Activity, Role, or Unit) and then drag the client codes to and from the un-allocated list into the appropriate Capacity Planner code. Note that clicking 'Save' will save changes to all of the mapping types as a group.

Data Type:

☒ Activity
☐ Role
☐ Unit

Show Mapping

Healthcare Facility:

HSC

Allocated Client Codes:

- [Admin]
 - Annual Leave
 - Available
 - Bereavement Leave
 - Break
 - Clinical
 - Coordination
 - Education
 - 1-1402
 - Meeting
 - 1-1405
 - Orientation
 - Parental Leave
 - Patient Transfer
 - Sick Leave
 - Study Leave
 - Watch

Unallocated Client Codes:

- 1-1150
- 1-1408
- 1-1409
- 1-2000GRTW
- 1-2000P20
- 1-2325P15
- 1-2354P19
- 1-2668P15
- 1-XN
- 2-1000
- 2-1025
- 2-1100
- 2-1150
- 2-1200
- 2-1205
- 2-1210
- 2-1230
- 2-1400
- 2-1402
- 2-1405
- 2-1408
- 2-1409
- 2-1410
- 2-1500
- 2-1502
- 2-1520

- The same process is used for Roles and Units.

Application Setup x

This page provides a mechanism for mapping the codes used in a client rostering system to the code used in Capacity Planner. Select the type of code to map (Activity, Role, or Unit) and then drag the client codes to and from the un-allocated list into the appropriate Capacity Planner code. Note that clicking 'Save' will save changes to all of the mapping types as a group.

Data Type:

☐ Activity
☒ Role
☐ Unit

Show Mappings

Healthcare Facility:

CH

Allocated Client Codes:

- [CRN]
 - HCA
 - LPN
 - NA
 - NC
 - NP
 - NURSE
 - 30003401
 - 30003404
 - PHY
 - RA
 - RPN
 - TA
 - UA
 - UC

Unallocated Client Codes:

- 30003575

7. Any unwanted codes can be removed the same way in reverse.
8. Drag from Allocated to Unallocated column.

Application Setup x

This page provides a mechanism for mapping the codes used in a client rostering system to the code used in Capacity Planner. Select the type of code to map (Activity, Role, or Unit) and then drag the client codes to and from the un-allocated list into the appropriate Capacity Planner code. Note that clicking 'Save' will save changes to all of the mapping types as a group.

Data Type:

☐ Activity
☐ Role
☒ Unit

Show Mappings

Healthcare Facility:

GH

Allocated Client Codes:

3ESUR

3NSUR

178

3SSUR

3WSUR

4NMED

176

4SMED

4WMED

CAU

Unallocated Client Codes

174

BEDS OPEN

Changes to the Beds Open can be made right in the Viewer, but they can also be set for shorter defined date ranges from within the Thick Client.

1. Click **Beds Open** from the Menu.
2. Select the **Healthcare Facility** from the dropdown.
3. Choose a **Ward Type** from the listing.
4. Choose one or more Wards from the listing.
5. Choose a starting date and time in the **From** section.
6. Choose the ending date and time in the **To** section.
7. Click **Save** when all changes are completed.
8. If the entry exceeds the Max Capacity, a message like this will display:

9. Click **Yes** to accept the incorrect value or **No** to cancel.

Differences between 'Set Beds' and 'Beds Open':

- Setting Beds Open here requires a beginning and an ending date/time.
- Ward choice is limited to only filter by Ward Type instead of Planning Group.
- There is no information about the Max Capacity in this view, so it is easier to exceed that value.
- Even if the value entered exceeds the Max Capacity, it can be saved. If this is done, the Max Capacity needs to quickly be corrected to accommodate this.

FORECASTING

Capacity Planner provides tools to create long-term plans using forecasts based on historical data and anticipated changes to trends or processes.

Access **Forecasting** from the Main Menu of the Capacity Planner application.

Forecasting x

Click a forecast and choose a task or double-click a forecast to open it.

Drag a column header here to group by that column.

Name	Description	Ward Type	Healthcare Facility
Acute MH 1	Acute MH 1	Mental Health	Hillview Hospital
Cardiac	Cardiac	Inpatient	Capital General
Coastal Maternity	Coastal Maternity	Maternity	Coastal
Delivery Suite	Delivery Suite	Delivery Suite	Capital General
ED	ED	Emergency Department	Capital General
ED Observation	ED Observation	Observation Area	Capital General
Hillview Forensic	Hillview Forensic	Mental Health	Hillview Hospital
HV Mental Health	Mental Health	Mental Health	Hillview Hospital
ICU	ICU	Intensive Care	Capital General
Medical	Medical	Inpatient	Capital General
Mental Health	Mental Health	Mental Health	Capital Mental Health
NICU	NICU	Intensive Care	Capital General
Observation	Observation	Inpatient	Hillview Hospital
Older Persons Psyc	Older Persons Psyc	Inpatient	Princess Mary Hospital
Oncology	Oncology	Inpatient	Capital General
Paediatrics	Paediatrics	Paediatric	Capital General
PM Mental Health	PMH Mental Health	Inpatient	Princess Mary Hospital
PM Surgical	Surgical	Inpatient	Princess Mary Hospital
PMH Maternity	PMH Maternity	Maternity	Princess Mary Hospital

Forecasting Tasks...

[Open the selected forecast](#)

Forecasts are done at **Planning Group** level. A Planning Group is a group of one or more specialties and units within a Ward Type, for example patients in a Medical specialty in a general inpatient bed. See **Ward Types** and **Planning Groups** in the **Application Setup – General** section above for more information on how these are defined.

All **Planning Groups** are listed in the **Forecasting Centre** though there are some you may choose not to forecast (like non-inpatient areas like Delivery Suite or Observation-type groups).

One of the main purposes of Forecasting demand is to be able to staff appropriately and proactively. The forecasted census flows through to Resource Planning, where we set the beds to accommodate the predicted demand. Then, we apply our staffing matrices (Planned Bed Ratios in Capacity Planner Ward build) to determine the staff required to care for the predicted demand.

OPEN FORECAST

To view or edit the forecasts for a Planning Group, double-click on one from the list or single-click and click **Open the selected forecast** at the bottom left of the screen.

Forecasting x

Click a forecast and choose a task or double-click a forecast to open it.

Drag a column header here to group by that column.

Name	Description	Ward Type	Healthcare Facility
PICU	PICU	Intensive Care	Children's Health Queensland
Medical	Medical	Inpatient	Children's Health Queensland
Surgical	Surgical	Inpatient	Children's Health Queensland
Cardiac	Cardiac	Inpatient	Children's Health Queensland
Oncology	Oncology	Inpatient	Children's Health Queensland
Respiratory and Sleep Unit	Respiratory and Sleep Unit	Day Stay	Children's Health Queensland
Medical Day Unit/Day Hospital	Medical Day Unit/Day Hospital	Day Stay	Children's Health Queensland
Oncology Day Unit	Oncology Day Unit	Day Stay	Children's Health Queensland
Rehab Day Unit	Rehabilitation Day Unit	Day Stay	Children's Health Queensland
4C - Day	4C - Day	Day Stay	Children's Health Queensland
EMERGV	Emergency Virtual Ward	Observation Area	Children's Health Queensland
Mental Health	Mental Health	Mental Health	Children's Health Queensland
HITH	HITH	Other	Children's Health Queensland
OTADV	OT Admission Virtual	Other	Children's Health Queensland
Surgical Admission Lounge	Surgical Admission Lounge	Other	Children's Health Queensland
ESSU	Emergency Short Stay	Other	Children's Health Queensland

Forecasting Tasks...

[Open the selected forecast](#)

PREVIEW FORECAST

From the Forecast Preview page, it's possible to view or edit an existing forecast or create a new forecast.

Reports x Forecasting x

Surgery

Date range: 17/05/2021 - 01/12/2021 ☐ Elective ☒ Acute ☐ Both

Preview Series:

- ☒ Annual
- ☒ Roster
- ☒ Operational
- ☒ This Year
- ☒ Last Year
- ☐ Beds Open

Time of Day: Average

[Apply changes](#)

Add to Forecast

- Select forecast source
- Forecast acute volume
- Set elective volume
- Make final adjustments
- Save range to forecast

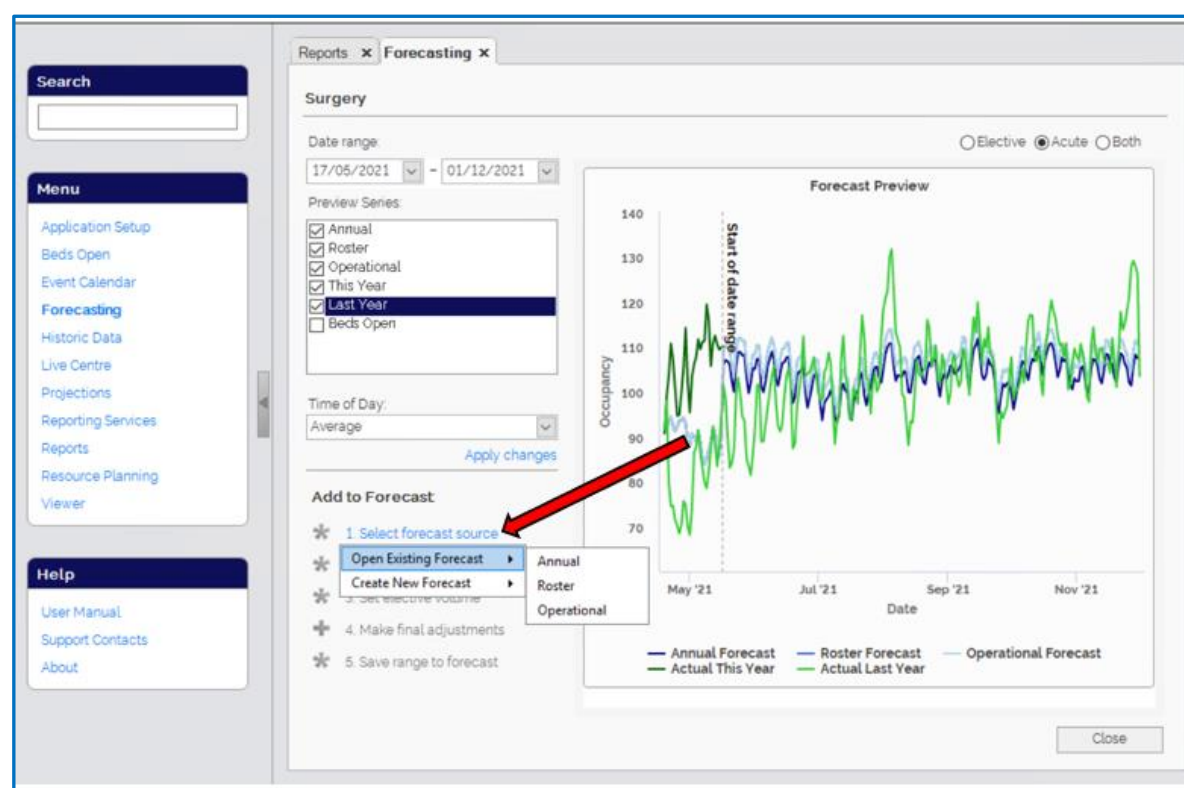
Forecast Preview

Close

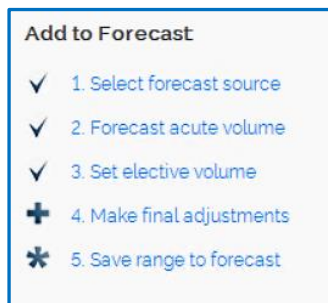
Previewing a Forecast:

- **Date range:** Set the start and end dates for the forecast you want to view, edit, or create.
- **Preview Series:** Select which chart series you want to display in the Preview Pane.
 - **Annual** – usually the first forecast created, the annual forecast often aligns with the budget period
 - **Roster** – usually a shorter-term forecast adjusted to reflect current trends. The roster forecast can be run to align with staffing roster periods.
 - **Operational** – a spare forecast series that can be used to model alternative scenarios
 - **This Year** – occupancy for the current 12 months up to the start date of the forecast
 - **Last Year** – occupancy for the corresponding period 12 months in the past
 - **Beds Open** – the number of beds recorded as open across the forecast period
- **Time of Day:** Average is the default and what Forecasting uses for calculations.
- To update the preview chart after any series have been changed click **Apply changes**.

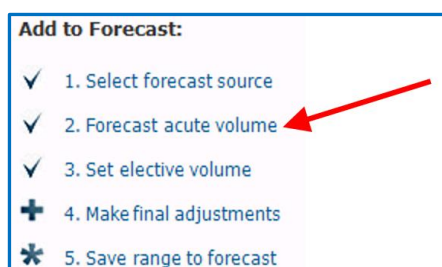
Editing an existing forecast or creating a new forecast:



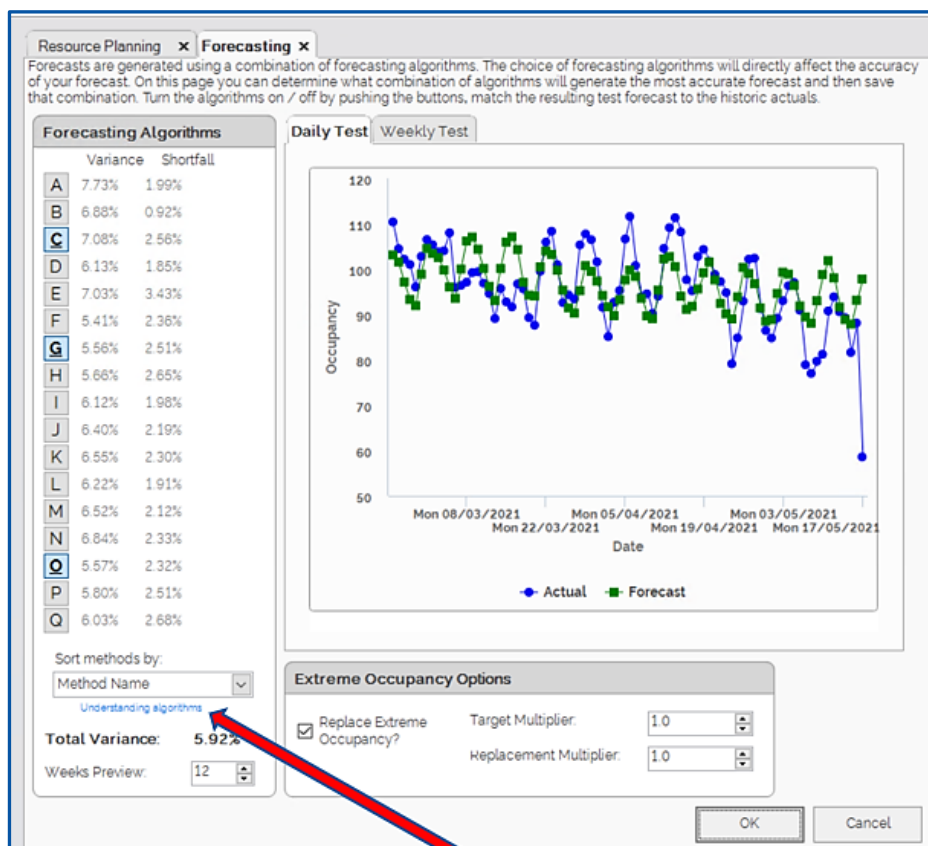
- From the **Add to Forecast** list, click **1. Select forecast source**.
- Forecasts already created for the period (Annual, Roster or Operational) show under **Open Existing Forecast** and can be selected. If there is no forecast for all or part of the date range set, the **Open Existing Forecast** option will not display any choices and the forecast will need to be created from the **Create New Forecast** option.
- Once a forecast source has been selected, the **Add to Forecast** options will activate.



FORECAST ACUTE VOLUME



The first step of creating an Acute forecast is to select the forecast methods to use. There are 17 methods A to Q.



The complete set of forecasting algorithms is displayed on the left-hand side of the window.

Tooltips describing the algorithm can also be viewed by hovering over the alpha buttons or clicking the **Understanding algorithms** link under the **Sort methods by** field. The forecast values (based on the selected algorithms) versus actuals, for the period leading up to the forecast date range, are shown on the right-hand side of the window.

Capacity Planner (Thick Client)

Because different algorithms may have been set in the past for different dates within the current date range, the default is based on the algorithms used for the last day within the forecast date range (where forecast values are defined).

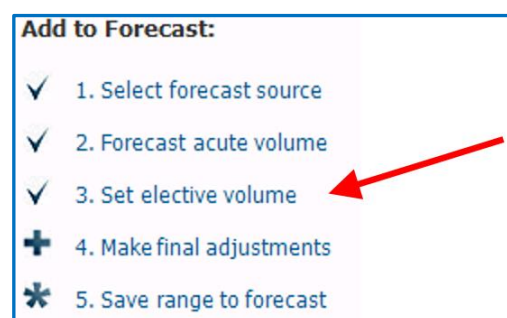
Other options in the forecasting screen are:

- **Weeks Preview:** Change to view forecast performance over a greater period (more than the default 12 weeks) and see how the mix of algorithms perform.
- **Extreme Occupancy Options:** Since many of the algorithms use a moving or rolling average, you can use this option to remove extreme values from these calculations that can easily skew the averages. You can use **Total Variance** on the bottom left as a test to see whether this is beneficial for your Planning Group, by clicking the **Replace Extreme Census** box and setting your **Target Multiplier** to 2 and your **Replacement Multiplier** to 1.

Once you are satisfied with the algorithm(s) chosen, click **OK** to move to the next step.

FORECAST ELECTIVE VOLUME

Select the Set elective volume option.



Capacity Planner can generate the elective volume part of your Forecast in one of several ways. You may elect to generate elective volume for some specialties using a Theatre Scenario (when available).

How would you like to generate Elective Volume?

Theatre Contribution

☐ Use a Theatre Scenario to simulate some Specialties' Volume

Refresh List

Remaining Contribution

☐ Don't generate any Elective Volume

☐ Generate Elective Volume that fills up this PG's capacity (Acute Volumes having already been added)

☐ Use Elective Volume from previous year

☒ Use Forecast methods to predict Volume [Choose Methods...](#)

There are four available options for generating an elective forecast under **Remaining Contribution**:

Don't generate any Elective Volume

- No elective forecast will be created (used for Emergency or other areas with no elective volumes)

Generate Elective Volume that fills up the PGs' capacity

- An elective forecast will automatically be generated that fills all available capacity in the home units/wards of the Planning Group.

Use Elective Volume from previous year

- The previous year's elective occupancy will be used. Used for specialties that have very small daily elective occupancy or little variance year-over-year.

Use Forecast methods to predict Volume

- Elective volumes can be predicted based on the same set of forecasting algorithms as used for forecasting acute volumes. Selecting this option enables **Choose Methods**. Using this option brings up the same forecast methods page used in the Forecast acute volume step.

*(Note: Some of the terms may vary from what is displayed (e.g., 'Scheduled' instead of 'Elective', etc.). Also, the displayed option **Use a Theatre [Surgery] Scenario** is no longer used in Capacity Planner.)*

MAKING MANUAL ADJUSTMENTS

Add to Forecast:

- ✓ 1. Select forecast source
- ✓ 2. Forecast acute volume
- ✓ 3. Set elective volume
- + 4. Make final adjustments
- * 5. Save range to forecast

The Make final adjustments screen provides three means of making adjustments:

THE PATIENT TURN & VOLUME TAB

The Patient Turn & Volume tab allows the user to enter expected high level assumptions for each specialty. Adjustments in the Patient Turn & Volume tab can be locked when used in conjunction with Timeline View adjustments. (See “Compensate for Manual Adjustment Volume” for more details.)

- **Patients In** - how many are expected / planned for the period and
- **Patient Turn** - how long, on average, patients are expected to stay in the specialty within the Ward Type

The difference between Patient Turn and Average Length of Stay:

Patient Turn = sum of the total occupancy over a specific period divided by the number of Patients In over the same period.

- Allows you to measure capacity for specialties that transfer patients to other specialties
- Less volatile when including long-stay patients
- Excludes portions of stay in other ward types, e.g., ICU

Average Length of Stay (ALOS) = sum of the length of stay (time between admission and discharge) for each patient discharged within a period divided by the number of patients discharged

- Allocated to specialty at time of discharge
- Volatile when including long-stay patients
- Includes other ward types e.g., ICU
- Length of Stay is still an important overall measure for hospitals.

Forecasting x

Adjust your final forecast data.

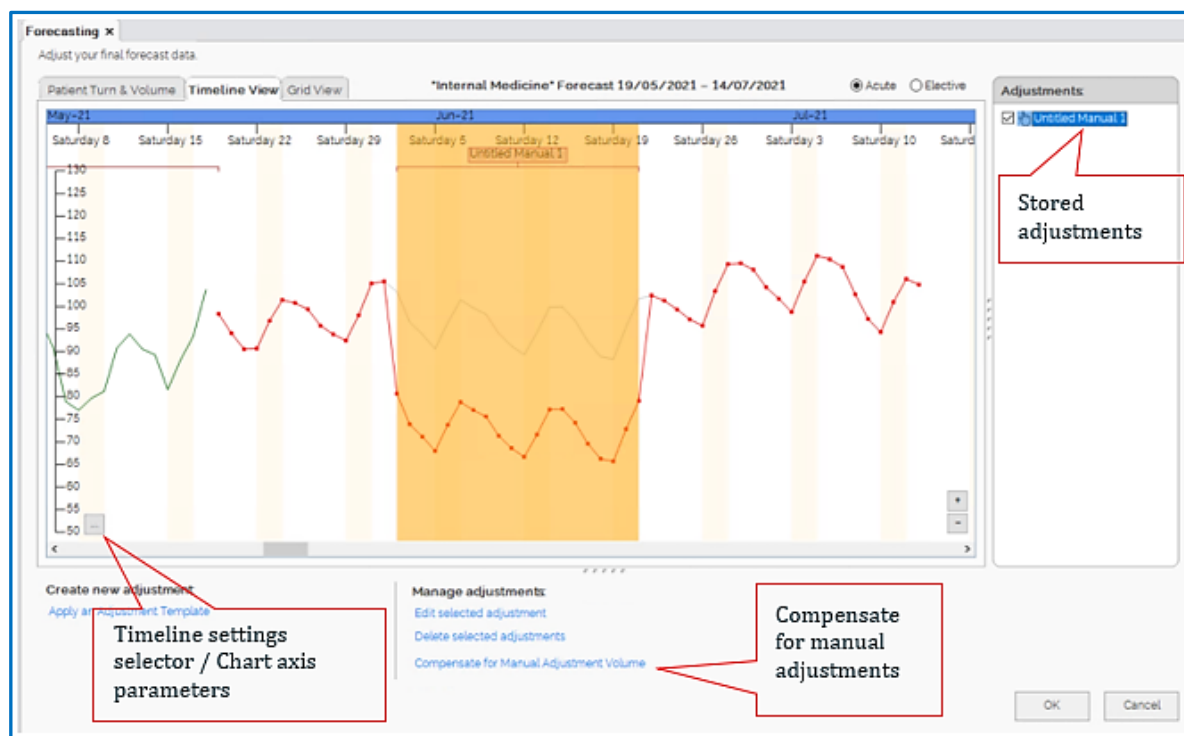
Patient Turn & Volume | Timeline View | Grid View

"Surgery" Forecast 01/07/2021 - 12/12/2021 ○ Acute ● Elective

Specialty	Occupancy		Patients In		Patient Turn In (Days)			Assumed		Final		
	Total 2 Years Back	Total Last Year	Total 2 Years Back	Total Last Year	2 Years Back	Last Year	Last 3 Months	Patient Tur	Patients In	Patient Tur	Patients In	Occupancy
Anaesthesiology	0	2	0	2	0.0	0.8	0.0	0.3	0	0.3	0	0
Burns Surgery	0	0	0	0	0.0	0.0	0.0	0.0	0	0.0	0	0
Dental Surgery	12	17	15	25	0.8	0.7	0.7	0.7	9	0.7	12	9
Dermatology	0	0	0	1	0.0	0.0	0.0	0.0	0	0.0	0	0
General Surgery	4028	4637	1387	1598	2.9	2.9	2.8	2.9	698	2.9	948	2721
Maxillofacial Surgery	275	190	99	93	2.8	2.0	2.0	2.3	43	2.3	59	134
Neurosurgery	1077	656	384	342	2.8	2.6	3.0	2.6	165	2.8	224	628
Ophthalmology	142	149	91	130	1.6	1.1	1.5	1.4	52	1.4	70	99
Otorhinolaryngology	679	663	352	391	1.9	1.7	2.1	1.9	172	1.9	234	449
Plastic Surgery Non..	688	912	248	316	2.8	2.9	3.6	3.1	134	3.1	182	559
Urology	903	1271	522	724	1.7	1.8	1.5	1.7	299	1.7	408	680
Grand Summaries	7,804	8,727	3,098	3,620	2.52	2.41	2.46	2.47	1,570	2.47	2,137	5,279

THE TIMELINE VIEW TAB

This allows data points to be dragged and dropped to the desired values.



Ranges can be chosen by selecting the start date from the top of the adjustment pane, holding the left mouse button down, and dragging across to the end date of the adjustment period. Data points within the selected range can then be selected and used to drag the series up or down.

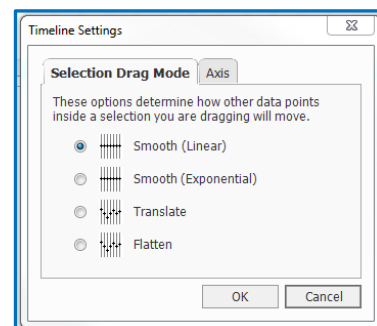
There are 4 options for choosing how the selected range will behave when dragged to a new position. Click on the small grey icon  at the bottom left corner of the adjustment pane to open the **Timeline Settings** selector.

Smooth (Linear) keeps the overall pattern of the original series with the series moving depending on whether it was selected from the start, middle or end.

Smooth (Exponential) the overall pattern of the original series distorts as the series is moved depending on whether it was selected from the start, middle or end.

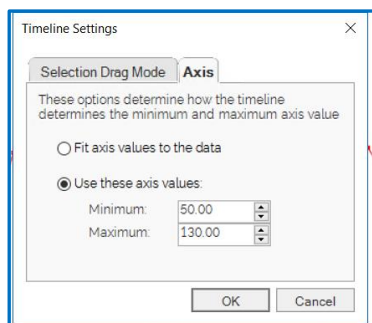
Translate moves the entire series up or down equally.

Flatten changes the selected range to a flat line. This option can be useful for flatten period of the forecast to zero.



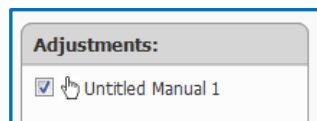
To maintain values entered in the Patient Turn and Volume pane while making Timeline View adjustments, click on **Compensate for Manual Adjustment Volume** once you have finished moving the timeline within a selection. This will adjust unchanged data points to compensate for the adjustments made and maintain the Patient Turn and Volume values.

Click on the small grey icon  at the bottom left corner of the adjustment pane to change the axis values of the Timeline View pane.



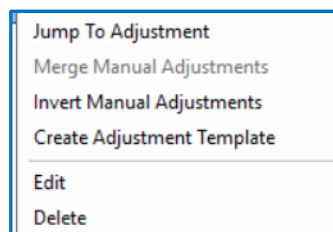
ADJUSTMENTS:

An 'Untitled Manual 1' box will appear in the Adjustments area on the right-hand side of the screen anytime an adjustment has been made.



Click the "Untitled Manual" adjustment to rename it something meaningful.

Right-click the manual Adjustment in the Adjustments area to display the pop-up menu below:



Jump to Adjustment displays an enlarged view of the adjustment.

If multiple adjustments are selected, they can be merged into a single adjustment using the **Merge Manual Adjustments** function. This can be helpful when multiple separate adjustments were made for a single purpose e.g., adjusting multiple days across the Christmas period.

Invert Manual Adjustment displays the adjustment in its inverted form.

Edit allows changes to existing adjustments.

Delete removes selected adjustments.

Create Adjustment Template creates a template based on the manual adjustment that can be reapplied. The template is given the same name as the manual adjustment but can be renamed and managed independently of the original manual adjustment. Templates are available to all Planning Group forecasts.

APPLY AN ADJUSTMENT TEMPLATE

Click **Apply an Adjustment Template** from the **Create new adjustment** list at bottom left of the window.

A list will appear showing all the available templates.



Drag and drop the selected template onto the chart making sure that the mouse is released over the first date where the template should be applied.

This creates a new adjustment.

Click the **Close** button to hide the list of Adjustment Templates.

THE GRID VIEW TAB

This displays data in a table format and allows daily adjustments to be typed into the Adjusted columns.

Forecasting x

Adjust your final forecast data.

Patient Turn & Volume Timeline View **Grid View** "Surgery" Forecast 01/07/2021 ~ 01/12/2021 ☐ Acute ☒ Elective

Date	Weekday	Original A...	Adjusted A...	Original Ele...	Adjusted Ele...	Acute Adjustm...	Elective Adjust...
01 Jul 21	Thursday	103.24	103.24	28.49	28.49		
02 Jul 21	Friday	97.32	97.32	26.27	26.27		
03 Jul 21	Saturday	93.73	93.73	24.28	24.28		
04 Jul 21	Sunday	97.71	97.71	20.45	20.45		
05 Jul 21	Monday	98.70	98.70	23.17	23.17		

On this tab, changes can be made to individual dates for both acute and elective patient volumes. This can be particularly helpful if volumes slip to reflect a fraction less than 1. These can display incorrectly on forecast reports, so they can be changed to a whole number on this tab.

To Convert a Manual Adjustment to an Adjustment Template:

Right-click on the manual adjustment and select Create Adjustment Template.

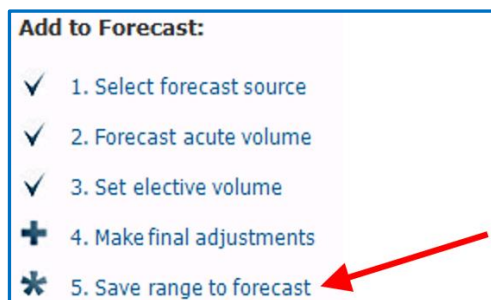
The manual adjustment is now saved as a template with the same name as the adjustment. The template is available to all Planning Group forecasts and can be renamed and managed independently of where the original manual adjustment was created (click the Apply an Adjustment Template link at the bottom of the Forecasting window to display the Adjustment Template Tasks list).

Click **OK** to return to the Forecast Preview screen.

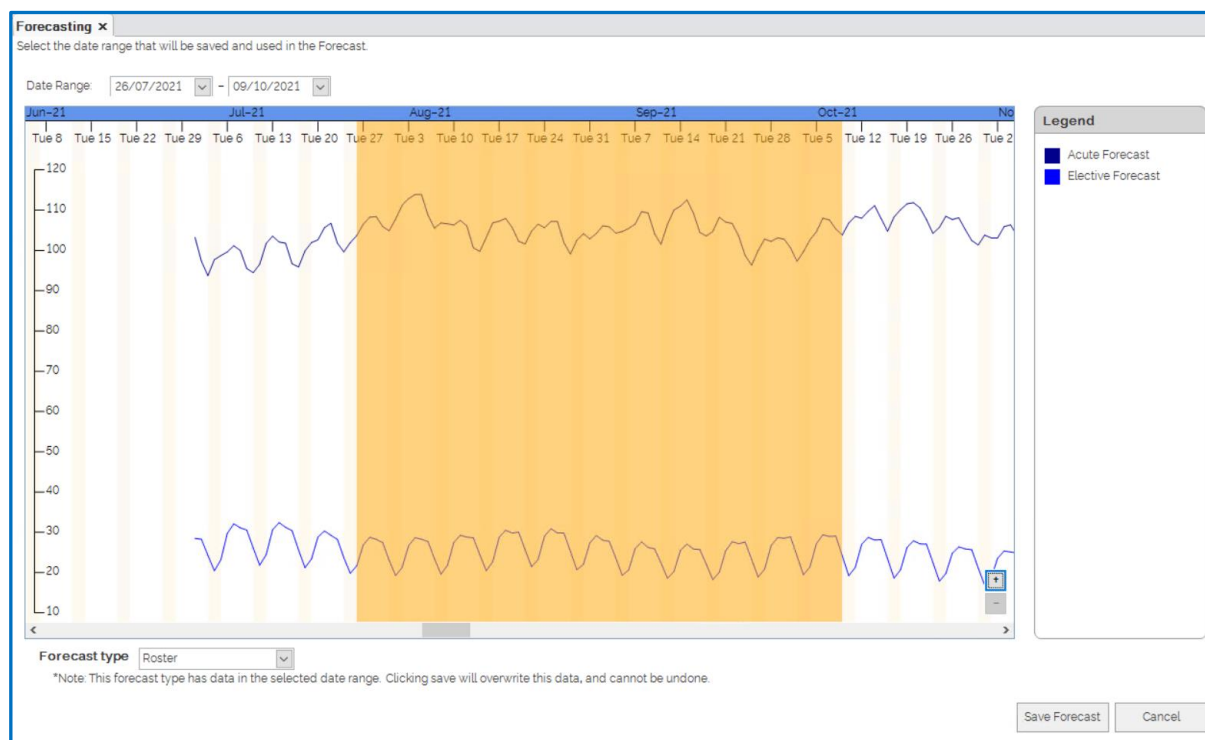
SAVE RANGE TO FORECAST

To Save a Forecast

Select **Save range to forecast**.



This displays a window where a sub-date range can be chosen within the current forecast date range and forecast type.



To save a smaller portion of the forecast, change the dates in the **Date Range** at the top or left-click and drag on the graph to highlight a date range.

Select the **Forecast Type** (see Forecast Types) from the drop-down box.

Clicking on **Save Forecast** will save the acute or emergency volume, elective volume, adjustments, and accompanying settings, for the specified forecast type for the specified date range. If a forecast has previously been saved against that forecast type, the new forecast will overwrite the old forecast for the specified sub-date range.

UNDERSTANDING FORECAST METHODS

- A Median**
Weekly and yearly patient data contains little variation and is stable in all aspects.
- B Average Weekday**
Patient numbers, by day of the week, is consistent with little seasonal or event driven patterns.
- C Weekday Last Year**
Daily patient numbers within a week contains little variation and is stable in all aspects.
- D Average Weekday Month**
Patient numbers year on year are reasonably stable. Daily patient numbers within a week contains little variation. Events and cycles happen at the same time each year.
- E Moving Median**
Daily and weekly patterns are stable with little daily variation. Over the course of a year patient numbers are increasing and decreasing.
- F Moving Four Week Weekday Percentage**
Patient numbers are subject to medium term cyclic fluctuations. The proportion of patient numbers each weekday is reasonably consistent, but overall patient numbers are increasing or decreasing over the course of the year.
- G Moving Two Week Weekday Percentage**
Patient numbers are subject to short term cyclic fluctuations. The proportion of patient numbers each weekday is reasonably consistent, but overall patient numbers are increasing or decreasing over the course of the year.
- H Moving One Week Weekday Percentage**
Daily and weekly patient numbers are highly variable. The overall patient numbers received year on year does not vary greatly.
- I Moving Two Year Four Week Weekday Percentage**
Patient numbers year on year are reasonably stable. Daily patient numbers within a week contains little variation. Events and cycles happen at the same time each year.
- J Moving Two Year Two Week Weekday Percentage**
Patient numbers year on year are subject to some volatility. Daily patient numbers within a week contains little variation. Events and cycles happen at the same time each year.
- K Moving Two Year One Week Weekday Percentage**
Patient numbers year on year are highly volatile. Daily patient numbers within a week contains little variation. Events and cycles happen at the same time each year.
- L Moving Two Year Four Week Rolling Weekday Percentage**
Daily patient volumes are consistent. Total weekly patient volumes have some variability and seasonal patterns are evident. Detects medium to short term changes in behaviour.
- M Moving Two Year Two Week Rolling Weekday Percentage**
Daily patient volumes are consistent. Total weekly patient volumes have noticeable variability and seasonal patterns are evident. Detects short term changes in behaviour.
- N Moving Two Year One Week Rolling Weekday Percentage**
Daily patient volumes are consistent. Total weekly patient volumes have significant variability and seasonal patterns are evident. Detects recent short term changes in behaviour.
- O Moving Four Week Rolling Weekday Percentage**
Daily patient volume patterns are consistent, but total weekly patient volumes have some variability. Detects medium term changes in behaviour.
- P Moving Two Week Rolling Weekday Percentage**
Daily patient volume patterns are consistent, but total weekly patient volumes have noticeable variability. Detects short term changes in behaviour.
- Q Moving One Week Rolling Weekday Percentage**
Daily patient volume patterns are consistent, but total weekly patient volumes have significant variability. Detects recent short term changes in behaviour.

HISTORIC DATA

From time to time, events can impact the historical data making it unsuitable for using when forecasting future occupancy. The impact of Covid-19 in 2020-21 is a good example. Historic Data can be used to adjust the data a forecast uses. Adjustments to Historic Data do not adjust the actual history, just the Data used by the forecasting algorithms. When viewing historical data in the Forecasting Centre the original history is displayed even after it has been adjusted.

Cleaning Historic Data

From the **Menu**, select **Historic Data**.

Historic Data x

Use this page to choose which historic data you want to edit.

Date range: 02/10/2021 - 05/05/2021

Healthcare Facility: Capital General

Planning Group: Cardiac Open

Menu

- Application Setup
- Beds Open
- Forecasting
- Historic Data**
- Live Centre
- Reporting Services
- Resource Planning
- Viewer

Help

- User Manual
- Support Contacts
- About

Select **Date Range**, **Healthcare Facility** and **Planning Group**.

Historic Data x

Use this page to choose which historic data you want to edit.

Date range: 01/01/2020 - 01/07/2020

Healthcare Facility: Waikato

Planning Group: Cardio Respiratory Services Open

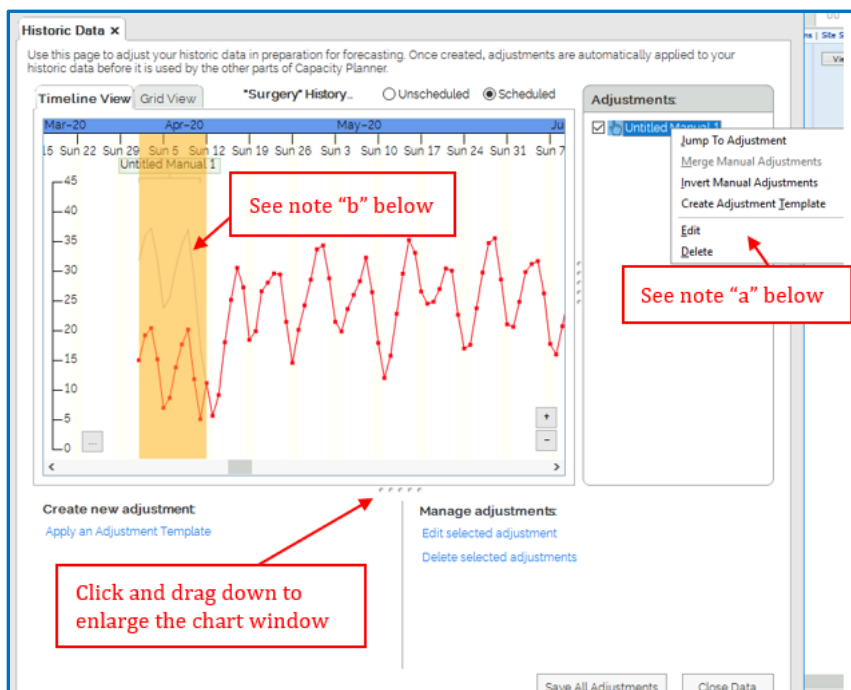
Click the **Open** button to view the chart. Adjustments are made in Historic Data the same way that manual adjustments are made to Forecasts.



Select the **Acute** or **Elective** radio button at the top right of the chart. They must be adjusted separately.

Adjust the historical data by any of the following methods:

- Dragging data points with the mouse
- Applying an Adjustment template
- Adjusting numbers directly in the grid view tab – this also creates a new adjustment template.



- Right-click the adjustment name to access this pop-up menu. Left-click the adjustment name twice to rename it.
- This is an area to which adjustments are made using drag and drop. The light grey line shows the original forecast data.

Click **Save All Adjustments** when done.

Caution: Adjusting historical data will impact all future forecasts and may impact existing forecasts if they are rerun.

CREATING AN ADJUSTMENT TEMPLATE

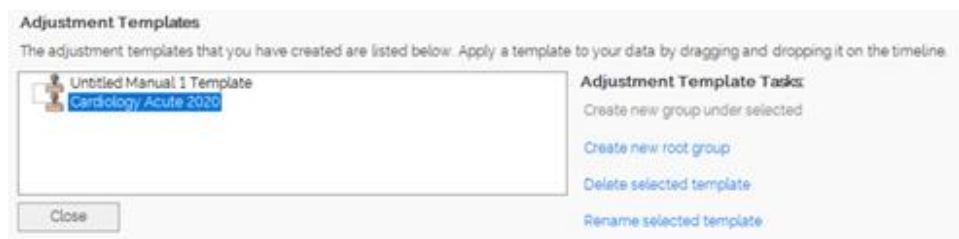
Make an adjustment using the methods outlined above.

Right click on the adjustment and select **Create Adjustment Template**



New templates show in Apply an Adjustment Template from the **Create new adjustment** at bottom left of the window.

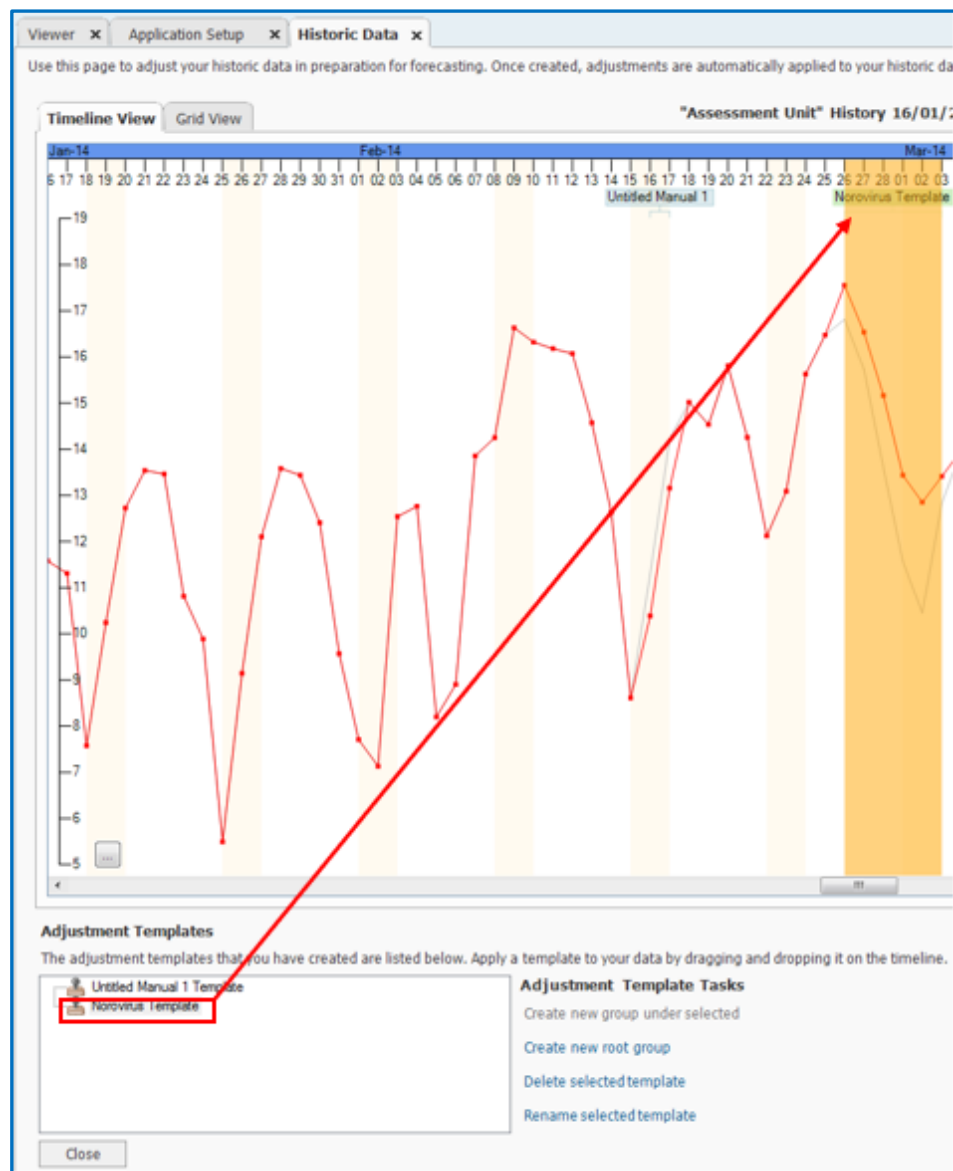
Name the Adjustment Template with a relevant name including the Planning Group name and Admission Type. Adjustment Templates can be selected and used for other Planning Groups.



APPLY AN ADJUSTMENT TEMPLATE

Click **Apply an Adjustment Template** from the **Create new adjustment** list at bottom left of the window.

A list will appear showing all the available templates.



Drag and drop the selected template onto the chart making sure that the mouse is released over the **first date** where the template should be applied.

This creates a new adjustment.

Click the **Close** button to hide the list of **Adjustment Templates**.

LIVE CENTRE

Live Centre is where Viewer Dashboard creation and access is established. Metric Views are also created and maintained in this location. The default view is Metric Views.

Live Centre x

Metric Views are used on the dashboard and can be viewed via the Capacity Planner Viewer statistics page. A new metric view can be created by selecting 'Add a metric view' from the task list. You can also edit existing metric views by double clicking on the metric view Name or selecting the metric view and clicking on the 'Open the selected metric view' task.

Metric Views

Base Folder

- Cardiac
- Delivery Suite
- ED
- ED Observation
- Hillview Acute Adolescent
- ICU
- Maternity
- Medical
- Mental Health
- NICU
- Oncology
- Paediatrics
- Surgical

Name	Type	Healthcare Facilities	Load Factor	Security
Cardiac	Folder		57548	
Delivery Suite	Folder		3540	
ED	Folder		13520	
ED Observation	Folder		39849	
Hillview Acute Adolescent	Folder		21023	
ICU	Folder		39639	
Maternity	Folder		41639	
Medical	Folder		60375	
Mental Health	Folder		43637	
NICU	Folder		39639	
Oncology	Folder		45636	
Paediatrics	Folder		45551	
Surgical	Folder		77182	

Manage Metric Views

- Add a new folder
- Add a new metric view
- Open the selected folder
- Open metrics viewer
- Set access for selected folder
- Generate metric view from template
- Manage metric view templates
- Save as template

Used Calculator Capacity

- All Metric Views: 88 %
- Selected Items: 10 %

METRIC VIEWS

Live Centre x

Metric Views are used on the dashboard and can be viewed via the Capacity Planner Viewer statistics page. A new metric view can be created by selecting 'Add a metric view' from the task list. You can also edit existing metric views by double clicking on the metric view Name or selecting the metric view and clicking on the 'Open the selected metric view' task.

Metric Views

Base Folder

- Cardiac
- Delivery Suite
- ED
- ED Observation
- Hillview Acute Adolescent
- ICU
- Maternity
- Medical
- Mental Health
- NICU
- Oncology
- Paediatrics
- Surgical

Name	Type	Healthcare Facilities	Load Factor	Security
Cardiac	Folder		57548	
Delivery Suite	Folder		3540	
ED	Folder		13520	
ED Observation	Folder		39849	
Hillview Acute Adolescent	Folder		21023	
ICU	Folder		39639	
Maternity	Folder		41639	
Medical	Folder		60375	
Mental Health	Folder		43637	
NICU	Folder		39639	
Oncology	Folder		45636	
Paediatrics	Folder		45551	
Surgical	Folder		77182	

Manage Metric Views

- Add a new folder
- Add a new metric view
- Open the selected folder
- Open metrics viewer
- Set access for selected folder
- Generate metric view from template
- Manage metric view templates
- Save as template

Used Calculator Capacity

- All Metric Views: 88 %
- Selected Items: 88 %

Capacity Planner (Thick Client)

1. To edit an existing Metric View, single-click the folder and double-click the Metric View to edit (or single-click and click **Open the selected** below).

Live Centre x

Metric Views are used on the dashboard and can be viewed via the Capacity Planner Viewer statistics page. A new metric view can be created by selecting 'Add a metric view' from the task list. You can also edit existing metric views by double clicking on the metric view Name or selecting the metric view and clicking on the 'Open the selected metric view' task.

Metric Views

Base Folder

- Cardiac
- Delivery Suite
- ED
- ED Observation
- Hillview Acute Adolescent
- ICU
- Medical**
- Neonatal
- Neonatal Intensive Care
- NICU
- Oncology
- Paediatrics
- Surgical

Name	Type	Healthcare Facilities	Load Factor	Security
MAPU	MetricView	Capital General	4550	Administrator, Planner, Operator, Mck_Con
Medical	MetricView	Capital General	45205	Administrator, Planner, Operator, Mck_Con
Medical 3	MetricView	Capital General	3540	Administrator, Planner, Operator, Mck_Con
Medical 5	MetricView	Capital General	3540	Administrator, Planner, Operator, Mck_Con
Medical 6	MetricView	Capital General	3540	Administrator, Planner, Operator, Mck_Con

Manage Metric Views

Add a new folder Add a new metric view Generate metric view from template

Open metrics viewer **Open the selected folder** Manage metric view templates

Set access for selected folder Rename the selected folder Save as template

Delete the selected folder

Used Calculator Capacity

All Metric Views: 88 %

Selected Items: 10 %

2. From here, you can change the **Name** if needed.
3. Otherwise, click the **Metric Groups** tab.

Live Centre x

Metric Views - GH Emergency Total LOS

Name: GH Emergency Total LOS

Settings | Metric Groups

Group Aggregate View: ☐ Metric

List By: Metric

Display in Ticker: ☐

4. From here, you can edit an existing Metric Group (by double-clicking an entry) or click **Add a Metric Group** to create a new one for this view.

Metric Views - GH Emergency Total LOS

Name: GH Emergency Total LOS

Settings | Metric Groups

Drag a column header here to group by that column.

Name	Source Type	Filter Source Type	List By	Source Sort B /	Order Index	Load Factor
Emergency End to End ALOS	Unit	None	Source	End to End ALOS	1	627

Tasks:

Add a Metric Group

Open the selected Metric Group

5. To change the source, click the **Sources** tab.

Metric Views - GH Emergency Total LOS - Emergency End to End ALOS

Name: Emergency End to End ALOS

Settings | **Sources** | Filter Sources | Metrics

Source Type: Unit

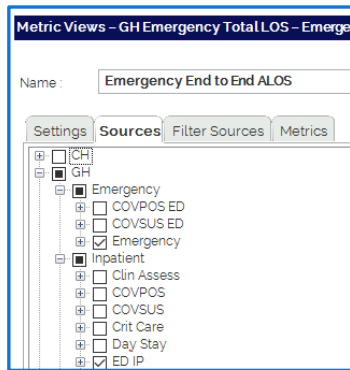
Filter Source Type: None

List By: Source

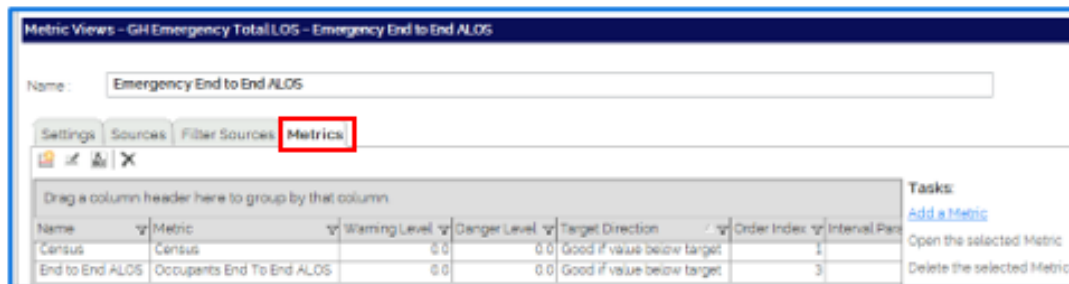
Source Sort By: End to End ALOS

Order Index: 1

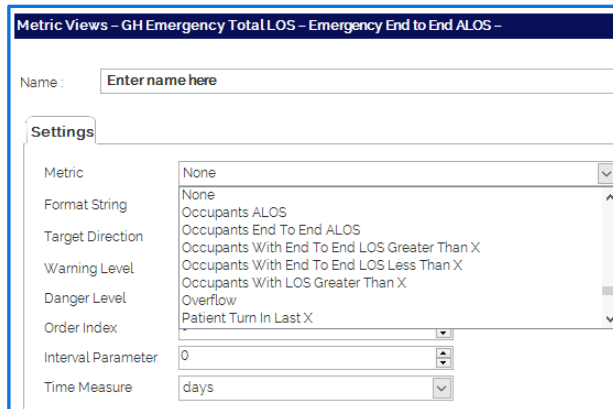
- Check new or uncheck any to be removed and click **Save** when finished.



- To make changes to the individual Metrics, click the **Metrics** tab.



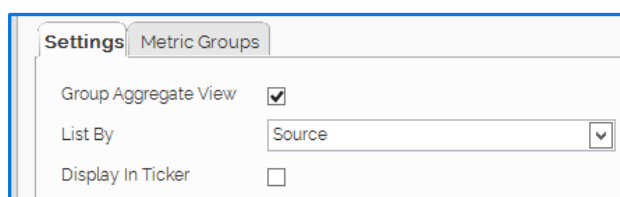
- If selecting an individual Metric to edit, you can change the **Warning Level** or **Danger Level**, change the sort order (**Order Index**).
- To add a new metric, click **Add a Metric** on the right.
- Enter the **Name** to display and choose a **Metric** from the dropdown. Those specific to individual patient-level data begin with "Encounter". The rest are summary-level metrics.



- Be sure to click **Save** when finished editing.

METRIC VIEW TIPS

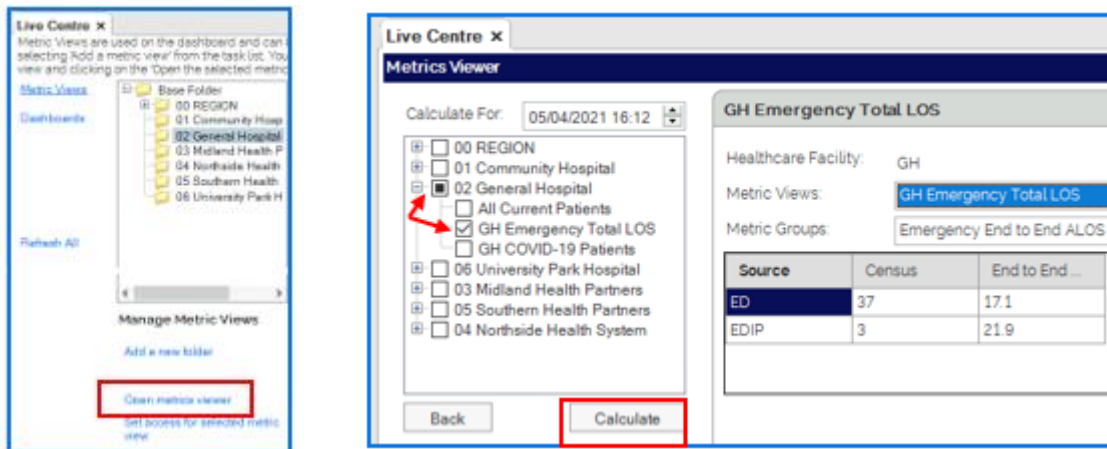
- On the "Settings" tab, the **Group Aggregate View** controls whether a metric view displays as a total value (checked) or separately (unchecked).
 - It should be checked for summary-level data.



- List By** controls whether the metric view is listed by Metric or Source.
 - For summary-level ones, choose "Source".

METRIC VIEWER

1. To view a Metric in Live Centre, click **Open metrics viewer** at the bottom.
2. From here, expand the site folder until the Metric Views are listed.
3. Check the box next to the one to be viewed and click **Calculate** at the bottom.

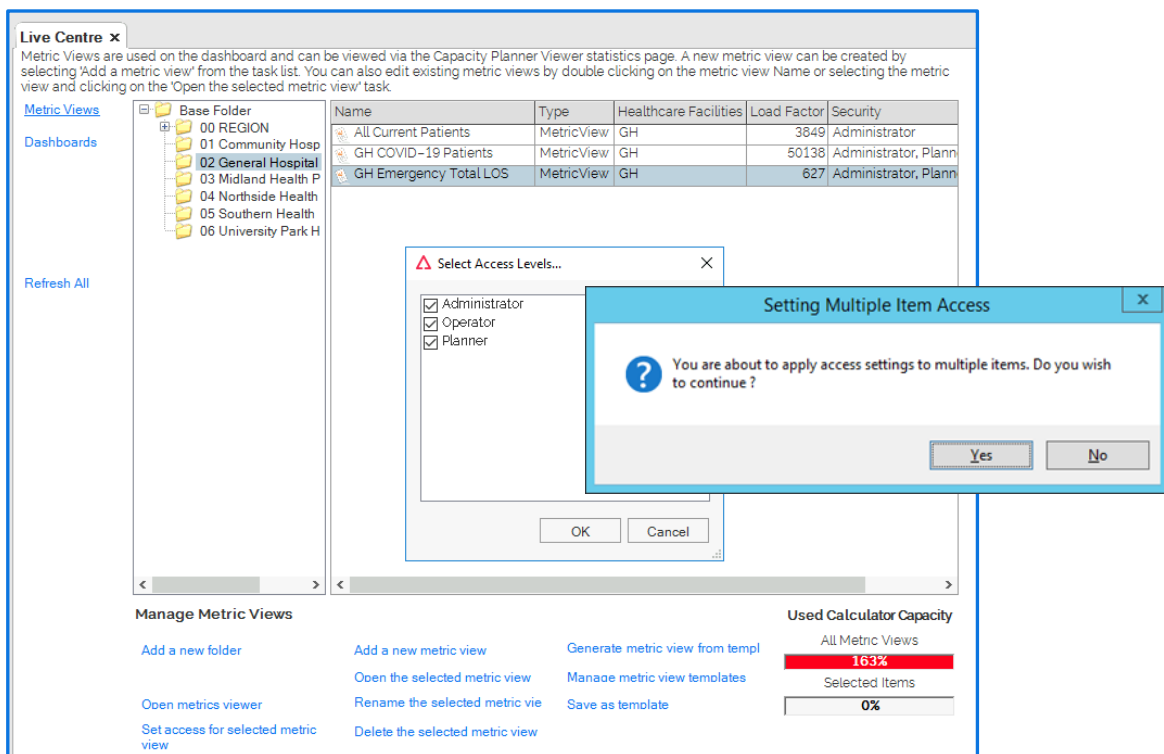


4. For longer Metric Views, you can sort by any of the columns by just clicking on the header.

METRIC VIEW ACCESS

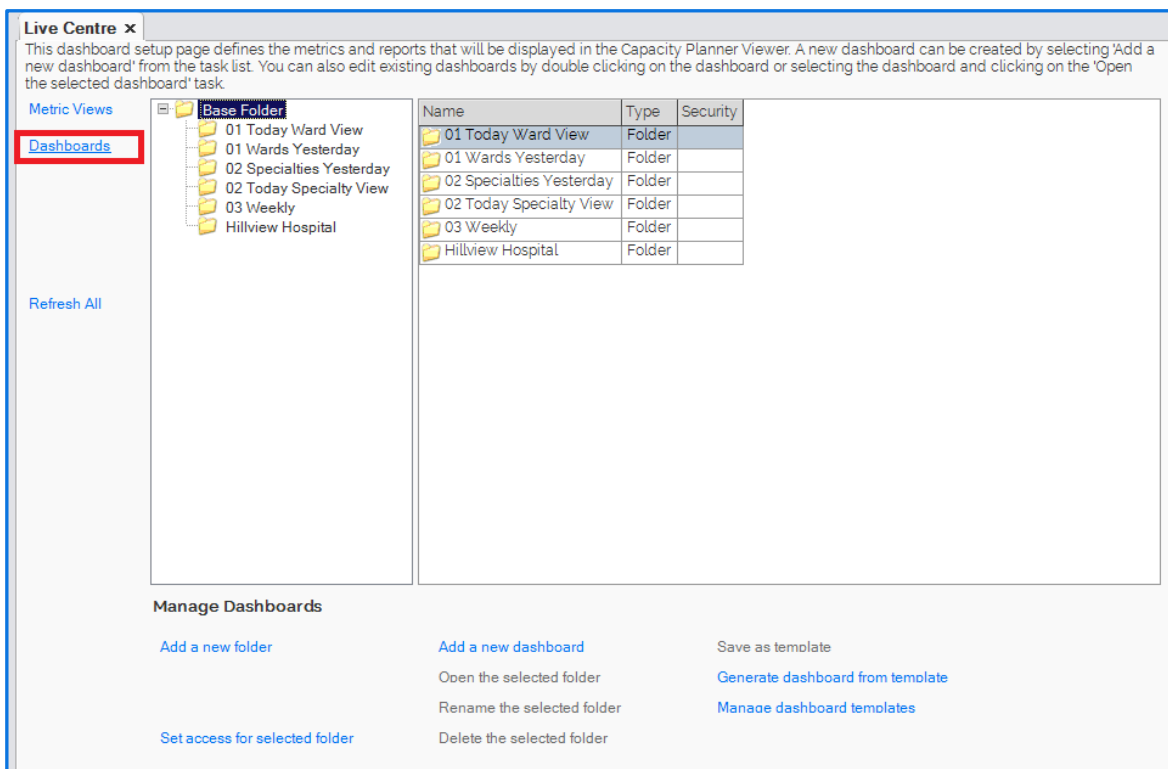
Each Metric View can have different Security defined, based on who should be able to view. encounter-level views may be more restricted than summary-level views.

1. To change Metric View access, single-click the Metric View to set or change and then click **Set access for selected metric view** at the bottom.
2. Select any Access Levels that should have access and click **OK**. Then click **Yes** on the pop-up box that confirms the change.

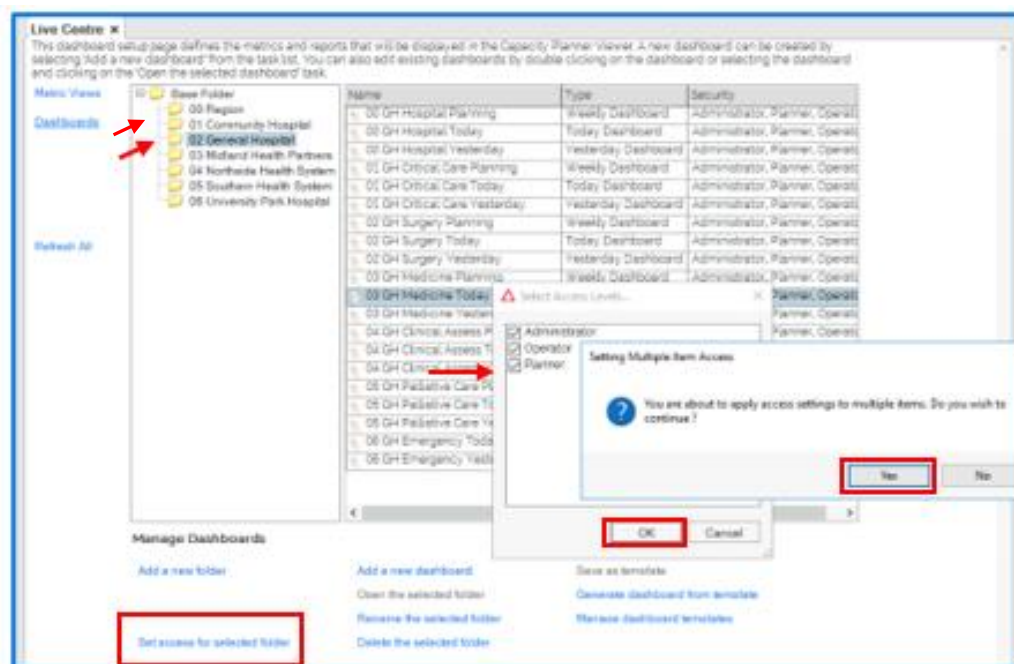


DASHBOARDS

This is where new Dashboard folders are created, change the name, or change the Security.



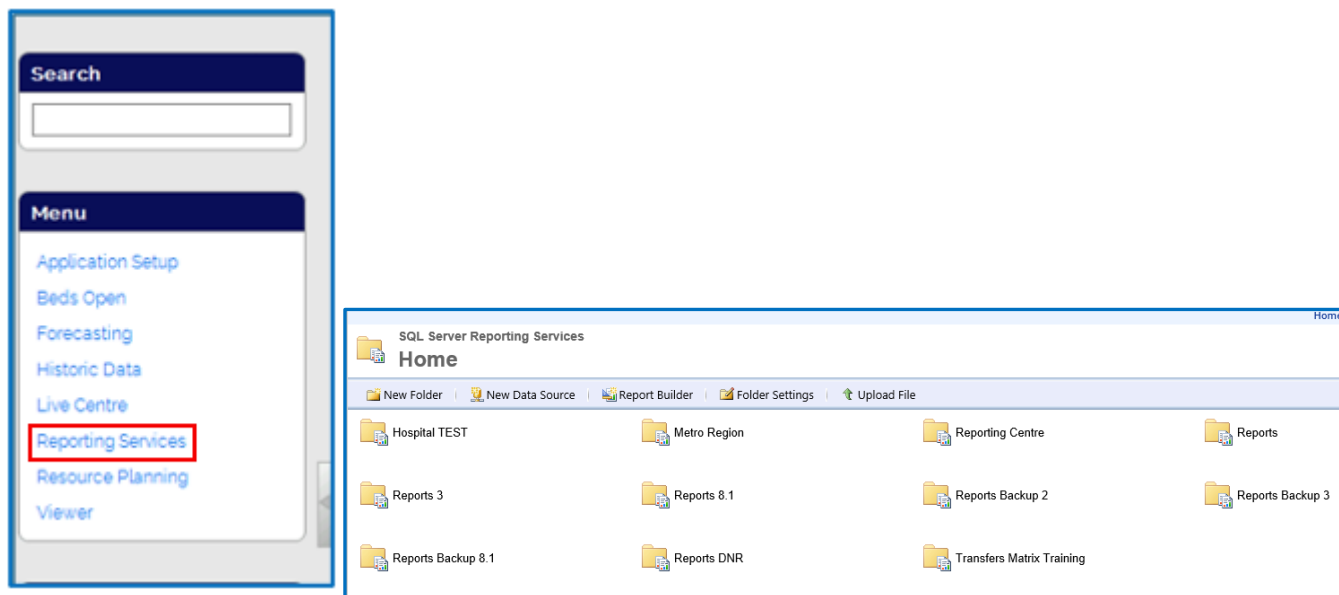
1. Click **Dashboards** to make any changes.
2. Click the facility folder to display the individual Dashboards created under that folder.
3. To change the name, single-click a Dashboard and click **Rename the selected folder** at the bottom.
4. To change the access (shown under "Security") to an individual Dashboard, single-click the Dashboard and click **Set access for selected folder** at the bottom. Just like the Metric Views, you can select or deselect any of the Access Levels as appropriate.



5. To set the security for an entire folder, select the folder on the left and then click **Set access for selected folder** and all the Dashboards in that folder will be granted the same access.

REPORTING SERVICES

This **Reporting Services** link from the Menu will open SQL Server Reporting Services (SSRS) using Internet Explorer. The majority of what is seen on the Viewer Dashboards are created and maintained here.

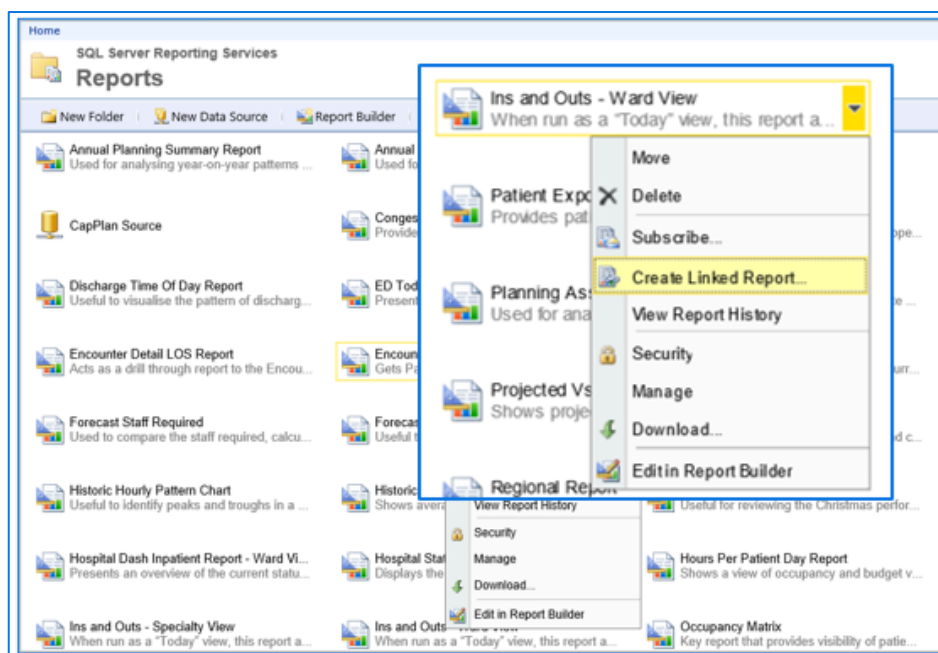


REPORT FOLDER STRUCTURE

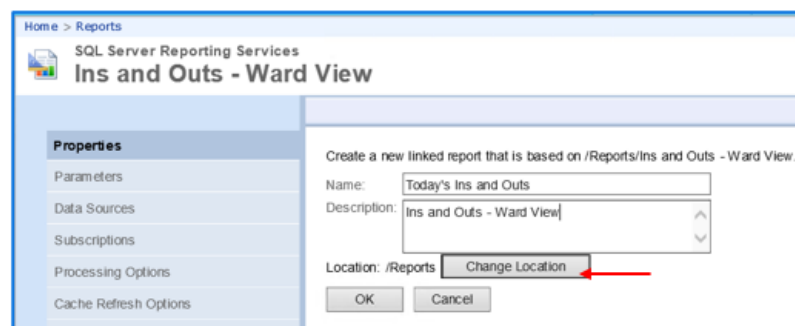
1. The “Reporting Centre” folder contains the base reports for the Web Portal reports. The “Reports” folder contains all the base SSRS reports. These are the source of the linked reports seen in the facility folders. Do not edit any of these.
 - **Note:** The Reports folder also has the “Parameter Values” report that lists all the parameters for each data element included in the reports.
2. Generally, each facility will have its own folder, but this may vary. There may also be separate folders by Region if multiple Regions exist in the same database. Here is an example of a multi-facility folder hierarchy:
 - Region 1
 - i. Facility 1
 1. Planning Group 1
 2. Planning Group 2
 - ii. Facility 2
 1. Planning Group 1
 2. Planning Group 2
 - Region 2

CREATE A LINKED REPORT

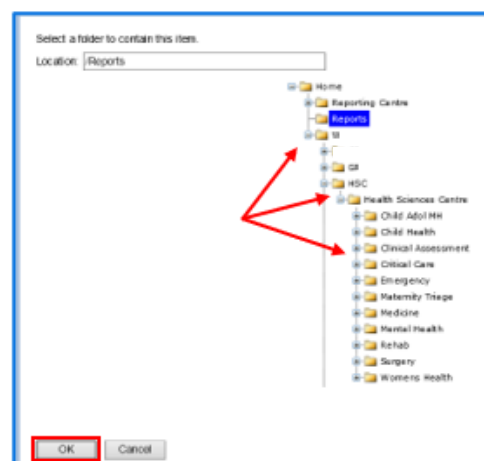
1. Open the **Reports** folder.
2. Locate the base report to use for the link and hover over the dropdown arrow.
3. Select **Create Linked Report** from the dropdown.



4. If any change is needed for the report name, change it in the **Name** field. Any other comments or notations can be made in the **Description** field (though neither is required).
5. Click **Change Location**.



6. Expand the higher level folders to locate the correct subfolder.
7. Single-click the destination folder and click **OK**.



8. Confirm the location and click **OK**.

Create a new linked report that is based on /Reports/Ins and Outs - Ward View.

Name:

Description:

Location: \HSC\Health Sciences Centre\Clinical Assessment

9. Click **Parameters**.

SQL Server Reporting Services
Ins and Outs - Ward View

Properties

Parameters

Subscriptions

Processing Options

Cache Refresh Options

Report History

Snapshot Options

Security

Modified Date: 9/14/2019 11:13 AM
Modified By:
Creation Date:
Created By:

Properties

Name:

Description:

☐ Hide in file view

Link to: /Reports/Ins and Outs - Ward View

10. Change any parameters as necessary and click **Apply**.
11. Refer to the “Parameter Values” report for the appropriate parameters for each report. Here are some examples of this report’s key pages (Ward Planning Group and Specialty Group).
- Note:** For the Specialty Groups, replace the “G” with an “S” when entering in the report parameters.
 - Where locations are included, an entire Planning Group can be selected by using the PG Parameter (e.g., P7, P6, and P33).

Home > Reports > Parameter Values

Healthcare Facility:

Ward Planning Group

Wards	Value
Hide Table	P-1
Health Sciences Centre	6
Child Health	W47
*Child Health	P7
GH4	26
GH5	27
OK3	28
OK5	29
OK53-WT1	33
OKC	30
PKUJ	31
PSUJ	32
Child/ Adol MH	W81
*Child Adol MH	P8
PR1NS	35
On Assess	W31
*On Assess	P33
OUJ	66
GB2	60
GB2	62
Optical Care	W57
*Optical Care	P2
DDJ	1
MCUJ	2
SICUJ	3

Specialty Group

Specialties	Value
Health Sciences Centre	6
Anaesthesia	G5
HSC Anaesthesia / Pain	G14
Cardiac Science	219
HSC Cardiac Sciences / Cardiology	183
HSC Cardiac Sciences / Diagnostics	G7
Child Adol MH	76
HSC Child Adol Psyc / Child Adol Psyc	G9
Child Health	275
HSC Child Health / Allergy	167
HSC Child Health / Anaesthesia	56
HSC Child Health / Bone Marrow Transpl	234
HSC Child Health / Cardiology	194
HSC Child Health / Child Development	14
HSC Child Health / Dentistry	266
HSC Child Health / Dermatology	89
HSC Child Health / Elm	64
Medicine	247
HSC Child Health / Endocrinology	136
HSC Child Health / Gastroenterology	
HSC Child Health / General Surgery	

Contents Page

[Service Planning Group](#)

[Service Group](#)

[Unit Planning Group](#)

[Staffing](#)

[Surgery](#)

[Miscellaneous](#)

[Start Times](#)

Capacity Planner (Thick Client)

12. Some parameters have defaults (e.g. “Today” and “Admissions/Discharges” in the example below). These have dropdowns with other choices.

Select the parameters that all users can change, and choose a default value for each.

Parameter Name	Data Type	Has Default	Default Value	Null	Hide	Prompt User	Display Text
SnapshotUsername	String	☒	ntdental/SVC-ResourceOp	☐	☒	☐	
NULLValue	String	☒		☒	☒	☐	
RunAs	String	☒	Today	☐	☒	☐	
DateToday	DateTime	☒	Override Default	☐	☒	☐	
DateYesterday	DateTime	☒	Override Default	☐	☒	☐	
StartDate	DateTime	☒	Override Default	☐	☒	☐	Start Date
StartTime	String	☒	00:00	☐	☐	☒	Start Time
ReportStartDateTime	DateTime	☒	Override Default	☐	☒	☐	
Today	DateTime	☒	Override Default	☐	☒	☐	
HealthcareFacility	String	☒	6	☐	☐	☒	Healthcare Facility
PlanningGroups	String	☒	P33	☐	☐	☒	Planning Groups
ProjectionType	String	☒	Admissions/Discharges	☐	☐	☒	Projection Type
OutsBeforeA	String	☒	11:00	☐	☐	☒	Outs Before (A)
OutsBeforeB	String	☒	14:00	☐	☐	☒	Outs Before (B)
ExpandCollapse	String	☒	Collapse	☐	☐	☒	Expand/Collapse All

Apply

13. The ones showing as **Override Default** should not be clicked or changed.

14. To enter multiple parameters, click “Enter” on the keyboard after each. There can be no extra spaces in between or after entries.

Select the parameters that all users can change, and choose a default value for each.

Parameter Name	Data Type	Has Default	Default Value
SnapshotUsername	String	☒	ntdental/SVC-ResourceOp
NULLValue	String	☒	
RunAs	String	☒	Today
DateToday	DateTime	☒	Override Default
DateYesterday	DateTime	☒	Override Default
StartDate	DateTime	☒	Override Default
StartTime	String	☒	00:00
ReportStartDateTime	DateTime	☒	Override Default
Today	DateTime	☒	Override Default
HealthcareFacility	String	☒	6
PlanningGroups	String	☒	P7, P8, P6, P9, P10, P
ProjectionType	String	☒	P7, P8, P9, P9
OutsBeforeA	String	☒	
OutsBeforeB	String	☒	
ExpandCollapse	String	☒	Collapse

Apply

SQL Server Reporting Services
PG Wards Today Dashboard

Properties

Parameters

Sub options

Processing Options

Cache History Options

Report History

Snapshot Options

Security

Always run this report with the most recent data.

Do not cache temporary copies of this report.

Cache a temporary copy of the report. Expires copy of report after a number of minutes: 30

Cache a temporary copy of the report. Expires copy of report on the following schedule:

Report specific schedule: Configure

At 8:00 a.m. every Mon of every week, starting 4/23/2021

Shared schedule: Daily

Every 1 hour(s) and 0 minute(s), starting 3/17/2019 at 2:00 a.m.

Render this report from a report snapshot.

Use the following schedule to create report snapshots:

Report specific schedule: Configure

At 8:00 a.m. every Mon of every week, starting 4/23/2021

Shared schedule: Daily

Every 1 hour(s) and 0 minute(s), starting 3/17/2019 at 2:00 a.m.

Create a report snapshot when you click the Apply button on this page.

Report Timeout

Use the system default setting.

Do not timeout report.

Limit report processing to the following number of seconds: 1800

Apply

15. When finished, click **Apply**.

16. Next, click **Processing Options**.

17. Select **Render this report from a report snapshot**.

18. Check **Create a report snapshot when you click the Apply button on this page** (to refresh report)

19. Click **Apply** to save changes.

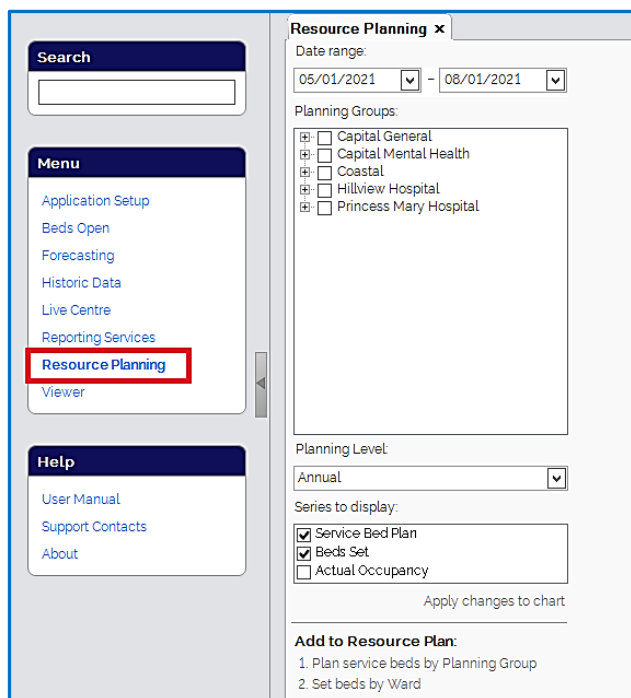
EDIT EXISTING REPORT

1. To edit an existing report, select the report from the correct subfolder and follow steps 9 through 19 above to update the report.

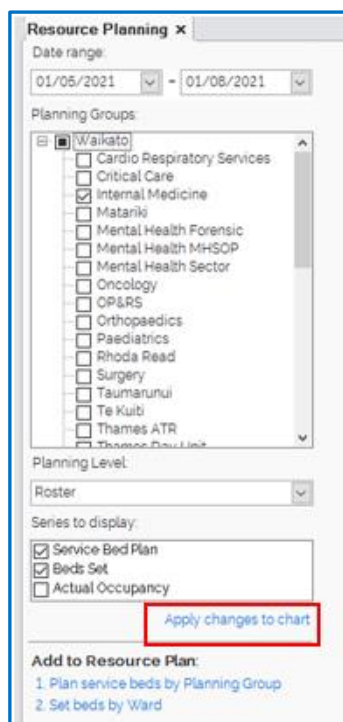
RESOURCE PLANNING

Resource Planning allows hospitals to plan beds from both a Specialty and Ward perspective. Planning Groups often have sufficient beds to accommodate their own patients and the Specialty and Ward plans contain the same number of beds. There can also be times when there is a mismatch between the forecast requirements and the Planning Group's ability to supply beds. In this case, separate bed plans can be made showing the number of beds allocated for the Specialty (Service Bed Plan) and a separate plan showing where the beds will be supplied (Roster Bed Plan).

1. Access **Resource Planning** from the main **Menu** of the Capacity Planner application.



2. From the Resource Planning menu, set the **Date Range**, **Planning Groups** and **Planning Level** then select **Apply changes to chart**.
3. Please note: Dashboard reports displaying Forecasts and Roster Bed Plans default to the 'Roster' Planning Level.
4. **Apply changes to chart** needs to be clicked to update charts and data following any parameter changes.



PLAN SERVICE BEDS BY PLANNING GROUP

Service beds are the number of beds allocated to the Planning Group's specialties - regardless of how many beds the PG supplies.

Bed granularity can be set in increments ranging from 15 minutes to multiple days. Service Bed Plans are most often set at a daily level unless there are regular bed closures, e.g., Surgical beds that close during the weekend.

Resource Planning x

Date range: 05/01/2021 - 08/01/2021

Planning Groups:

- ☐ Capital General
- ☐ Capital Mental Health
- ☐ Coastal
- ☐ Hillview Hospital
- ☐ Princess Mary Hospital

Planning Level: Annual

Series to display:

- ☒ Service Bed Plan
- ☒ Beds Set
- ☐ Actual Occupancy

Apply changes to chart

Add to Resource Plan:

1. Plan service beds by Planning Group
2. Set beds by Ward

Resource Planning x

Set beds by Ward (Roster)

Planning Group: Internal Medicine

From: 01/05/2021 00:00

To: 01/08/2021 00:00

At every: 1 days

0 hours

0 minutes

Apply

Planned Beds values can be typed in or copied and pasted using standard controls; ctrl+C (copy) and ctrl+V (paste).

Edited beds turn red until saved.

Resource Planning x

Planned Service Beds by Planning Group (Roster)

From: 01/05/2021 00:00

To: 01/08/2021 00:00

At every: 1 days

0 hours

0 minutes

Apply

Date	Combined PGs				Internal Medicine Capacity 120				
	Forecast Beds	Planned Beds	Planned - Forecast Difference	Beds Set	Set - Planned Difference	Forecast Beds	Planned Beds	Beds Set	Planned - Forecast Difference
Sat 01/05/2021 00:00	91	120	▲ 29	110	▼ -10	91	120	110	▲ 29
Sun 02/05/2021 00:00	96	120	▲ 24	110	▼ -10	96	120	110	▲ 24
Mon 03/05/2021 00:00	102	120	▲ 18	110	▼ -10	102	120	110	▲ 18
Tue 04/05/2021 00:00	99	120	▲ 21	110	▼ -10	99	120	110	▲ 21
Wed 05/05/2021 00:00	97	120	▲ 23	110	▼ -10	97	120	110	▲ 23
Thu 06/05/2021 00:00	92	120	▲ 28	110	▼ -10	92	120	110	▲ 28
Fri 07/05/2021 00:00	90	120	▲ 30	110	▼ -10	90	120	110	▲ 30
Sat 08/05/2021 00:00	89	120	▲ 31	110	▼ -10	89	120	110	▲ 31
Sun 09/05/2021 00:00	94	120	▲ 26	110	▼ -10	94	120	110	▲ 26
Mon 10/05/2021 00:00	100	120	▲ 20	110	▼ -10	100	120	110	▲ 20
Tue 11/05/2021 00:00	102	120	▲ 18	110	▼ -10	102	120	110	▲ 18
Wed 12/05/2021 00:00	98	120	▲ 22	110	▼ -10	98	120	110	▲ 22
Thu 13/05/2021 00:00	92	120	▲ 28	110	▼ -10	92	120	110	▲ 28
Fri 14/05/2021 00:00	89	120	▲ 31	110	▼ -10	89	120	110	▲ 31
Sat 15/05/2021 00:00	91	120	▲ 29	110	▼ -10	91	120	110	▲ 29
Sun 16/05/2021 00:00	95	120	▲ 25	110	▼ -10	95	120	110	▲ 25
Mon 17/05/2021 00:00	102	124	▲ 22	110	▼ -14	102	124	110	▲ 22
Tue 18/05/2021 00:00	101	124	▲ 23	110	▼ -14	101	124	110	▲ 23
Wed 19/05/2021 00:00	98	124	▲ 26	110	▼ -14	98	124	110	▲ 26
Thu 20/05/2021 00:00	93	124	▲ 31	110	▼ -14	93	124	110	▲ 31
Fri 21/05/2021 00:00	90	124	▲ 34	110	▼ -14	90	124	110	▲ 34
Sat 22/05/2021 00:00	91	124	▲ 33	110	▼ -14	91	124	110	▲ 33
Sun 23/05/2021 00:00	98	124	▲ 26	110	▼ -14	98	124	110	▲ 26
Mon 24/05/2021 00:00	103	124	▲ 21	110	▼ -14	103	124	110	▲ 21
Tue 25/05/2021 00:00	101	124	▲ 23	110	▼ -14	101	124	110	▲ 23
Wed 26/05/2021 00:00	99	124	▲ 25	110	▼ -14	99	124	110	▲ 25
Thu 27/05/2021 00:00	95	124	▲ 29	110	▼ -14	95	124	110	▲ 29
Fri 28/05/2021 00:00	95	124	▲ 29	110	▼ -14	95	124	110	▲ 29
Sat 29/05/2021 00:00	94	124	▲ 30	110	▼ -14	94	124	110	▲ 30
Sun 30/05/2021 00:00	99	124	▲ 25	110	▼ -14	99	124	110	▲ 25
Mon 31/05/2021 00:00	106	124	▲ 18	110	▼ -14	106	124	110	▲ 18

Revert to Generated

Key: Generated Saved Edited

Save Close

Set beds by ward allows the hospital to plan how many beds will be supplied by each Planning Group. Often the beds set will be primarily for the patients of the Planning Group but in times of high demand, e.g., winter beds from one Planning Group may be used for patients from another specialty.

Resource Planning x

Date range: 05/01/2021 - 06/01/2021

Planning Groups:

- ☐ Capital General
- ☐ Capital Mental Health
- ☐ Coastal
- ☐ Hillview Hospital
- ☐ Princess Mary Hospital

Planning Level: Annual

Series to display:

- ☒ Service Bed Plan
- ☒ Beds Set
- ☐ Actual Occupancy

Apply changes to chart

Add to Resource Plan:

1. Plan service beds by Planning Group
2. Set beds by Ward

Resource Planning x

Set beds by Ward (Roster)

Planning Group:

Internal Medicine

From: 01/05/2021 00:00

To: 01/08/2021 00:00

At every: 1 days

0 hours

0 minutes

Apply

Resource Planning x

Set beds by Ward (Roster)

Planning Group

Internal Medicine

From: 01/05/2021 00:00

To: 30/05/2021 00:00

At every: 1 days

0 hours

0 minutes

Apply

Combined Planning Groups

Planning Group: Internal Medicine

Capac.: 120

Drag a column header here to group by that column

	Internal Medicine PG				Combined PGs	Internal Medicine Wards - Beds Set				
Date	Forecast Beds	Planned Beds	Beds Set	Set - Planned Difference	Set - Planned Difference	WKA2 Capacity 26	WKA3 Capacity 26	WKA4 Capacity 26	WKAMU Capacity 26	WKM03 Capacity 16
Sat 01/05/2021 00:00	91	124	105	-19	-19	25	20	25	19	16
Sun 02/05/2021 00:00	96	124	105	-19	-19	25	20	25	19	16
Mon 03/05/2021 00:00	102	124	105	-19	-19	25	20	25	19	16
Tue 04/05/2021 00:00	99	124	105	-19	-19	25	20	25	19	16
Wed 05/05/2021 00:00	97	124	105	-19	-19	25	20	25	19	16
Thu 06/05/2021 00:00	92	124	105	-19	-19	25	20	25	19	16
Fri 07/05/2021 00:00	90	124	105	-19	-19	25	20	25	19	16
Sat 08/05/2021 00:00	89	124	105	-19	-19	25	20	25	19	16
Sun 09/05/2021 00:00	94	124	105	-19	-19	25	20	25	19	16
Mon 10/05/2021 00:00	100	124	110	-14	-14	25	25	25	19	16
Tue 11/05/2021 00:00	102	124	110	-14	-14	25	25	25	19	16
Wed 12/05/2021 00:00	98	124	110	-14	-14	25	25	25	19	16
Thu 13/05/2021 00:00	92	124	110	-14	-14	25	25	25	19	16
Fri 14/05/2021 00:00						25	25	25	19	16
Sat 15/05/2021 00:00						25	25	25	19	16
Sun 16/05/2021 00:00						25	25	25	19	16
Mon 17/05/2021 00:00						25	20	25	19	16
Tue 18/05/2021 00:00						25	20	25	19	16
Wed 19/05/2021 00:00						25	20	33	19	16
Thu 20/05/2021 00:00						25	20	25	19	16
Fri 21/05/2021 00:00						18	25	25	19	16
Sat 22/05/2021 00:00						16	25	25	19	16
Sun 23/05/2021 00:00						16	25	25	19	16
Mon 24/05/2021 00:00						16	25	25	19	16
Tue 25/05/2021 00:00						16	25	25	19	16
Wed 26/05/2021 00:00						16	25	25	19	16
Thu 27/05/2021 00:00						16	25	25	19	16
Fri 28/05/2021 00:00						16	25	25	19	16
Sat 29/05/2021 00:00						16	25	25	19	16

Maximum capacity exceeded

33 is greater than the maximum capacity of the ward (26)

OK

Key: Generated Saved Edited

Save

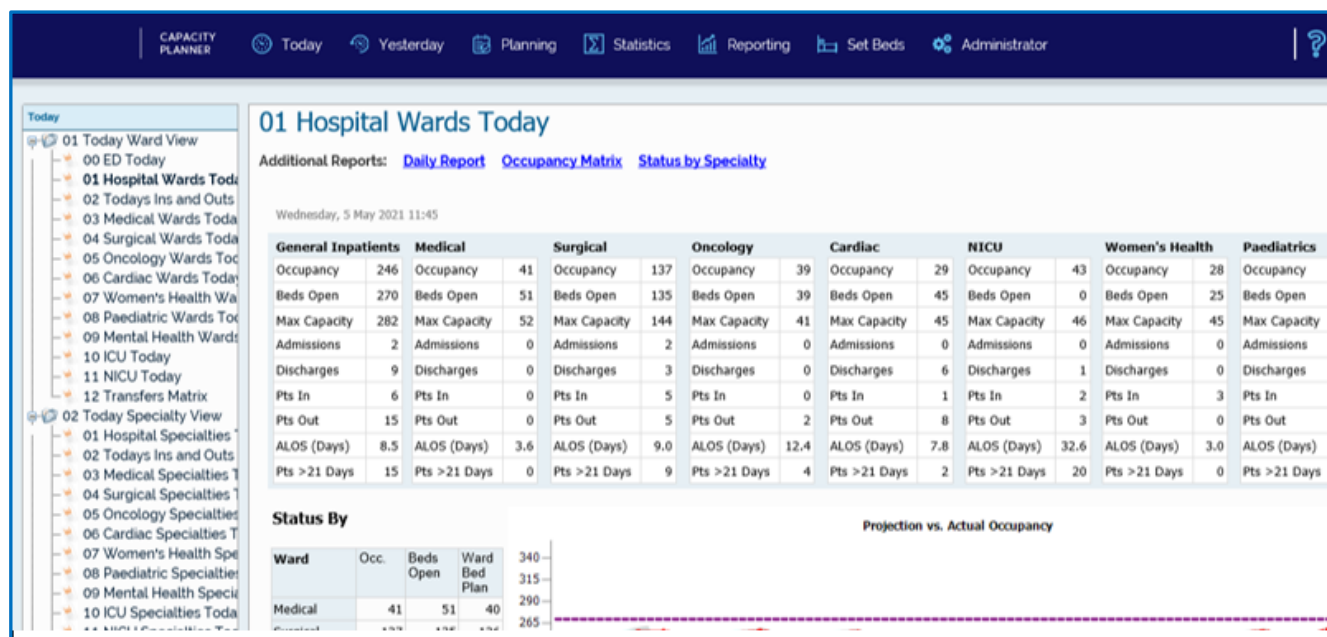
Cancel

Edited beds turn red until saved.

Maximum capacity is set individually for each Ward in Application Setup – Wards. Resource Planning needs to be closed and reopened to update any changes to maximum capacity. Click **Save** when finished.

VIEWER

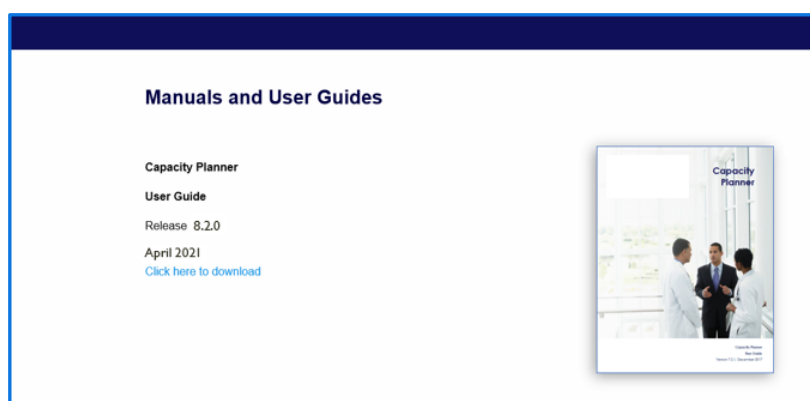
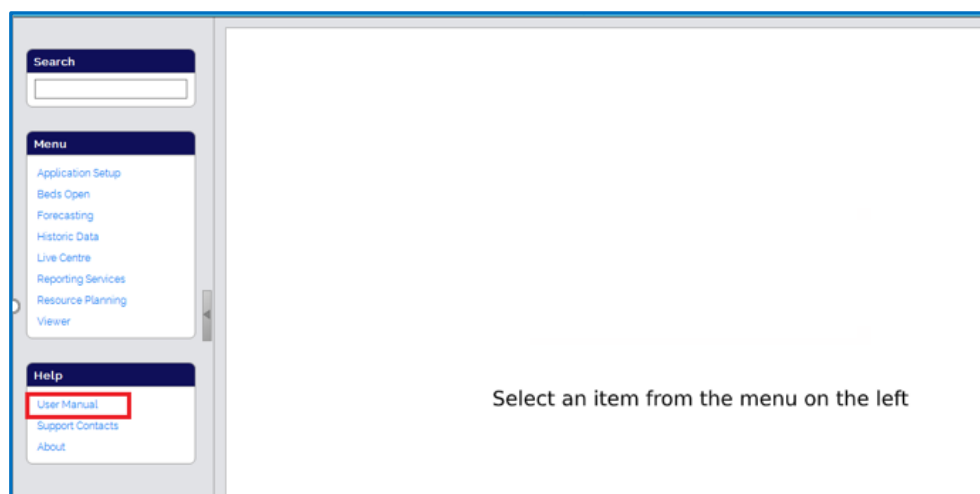
Opens Capacity Planner Viewer in an internet browser window.



For further information please refer to the Capacity Planner User Guide.

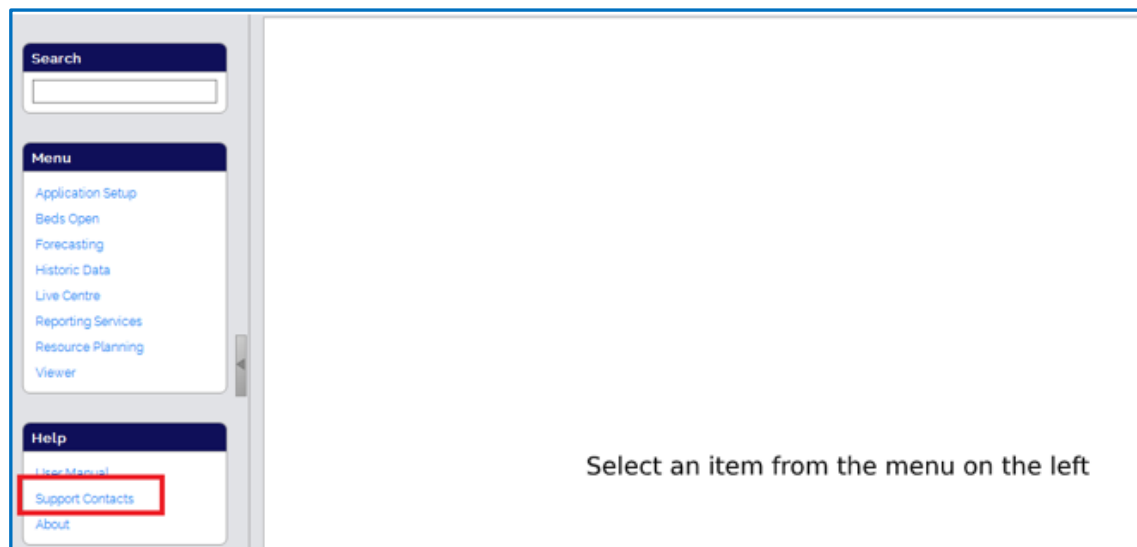
USER MANUAL

Opens a link to the user documentation in a browser window.



SUPPORT CONTACTS

Opens a link to the support contacts in a browser window.



ABOUT

If asked for the current version and you are unsure, click **About** under **Help**.

