

HealthStream™



Capacity Planner

User Guide

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Introduction

The purpose of this document is to provide detailed information for Capacity Planner (CP) in the following areas:

- How to access CP
- How CP is configured and what this means (i.e. Planning Groups and Service Types)
- What the dashboards display
- Which reports are available on demand and how to read them
- What statistics can be displayed
- Utilizing the Help function

This document serves as a training and information document for using CP and is based on standard operating procedures.

Your CP might be configured slightly differently than the screenshots that are added to this document, but the concepts and how to read the dashboards and reports will share the same principles.

BRIEF OVERVIEW OF CP AND HOW IT WORKS

The main CP dashboards and reports provide global visibility of the hospital status which can also be viewed in more detail at Planning Group or unit level.

CP provides information on what happened yesterday, and accurately projects patient activity (Patients In/Out) and occupancy for the next 24 – 72 hours. This information can be used to understand constraints and plan and manage the hospital proactively. It should inform, and support hospital decision making and monitor actual activity against projected activity.

There is no data entry required. The data in CP comes directly from the registration system (aka ADT system). When a transaction is made in the ADT system, the information is reflected in CP. The main dashboard screens are updated regularly with reports scheduled to run daily or as appropriate.

The patient management or registration system will be required to send information in real time, so CP reflects the current status of the hospital.

You cannot 'break' CP. There is no data entry, and people with operational user access have no ability to change or delete anything. This means you can navigate around the program and get familiar with the available information without any worry.

How To Use Capacity Planner

This section explains how each group of users would be expected to use the reports and dashboards in Capacity Planner.

EXECUTIVE MANAGEMENT

CEO, COO, CNO, CMO, CFO

CP helps you to:

- Understand at a glance the hospital status, including where the bottlenecks are, what is coming and what changes are required to increase capacity to meet the demand.
- Manage pandemic bed planning and staff allocation needs to accommodate unprecedented decreases and increases in volumes.
- Assure the staff schedules are based on anticipated workload that stays within budget guideline.

What to look at:

- Use the “Today” dashboards to see the state of the hospital against both short-term strategic plans and current beds open. There are views from both unit and service perspective, allowing you to see not only where issues exist, but which services are triggering them.
- See the response made to variances to plan, where additional beds have been opened or beds have been reduced.
- See the projected occupancy for the next 1-6 days. Projections can provide advanced warning of potential capacity issues allowing early intervention
- Use the “Yesterday” dashboards to review yesterday’s performance. Were there missed opportunities in discharge time of day?
- Long term plans can be made using the Capacity Planner forecasting tools. The “Planning” dashboards provide charts and metrics showing how the hospital is tracking against plans made.
- Emergency dashboards show whether patients are moving freely to Inpatient beds and whether Emergency wait times targets are being met.
- Staffing can be viewed on PG Today dashboards, along with other reports throughout CP to compare staff scheduled to what is required based on both short-term and long-term expected patient volumes.

Places to look:

- Hospital and PG Today Dashboards and linked reports
- ED Today Dashboard
- Yesterday Dashboards
- Planning Dashboards
- Reporting – On Demand Reports and Dashboards

NURSING MANAGEMENT

CNO, Nursing Directors, Nurse Managers

CP helps you to:

- Easily see current and projected occupancy and plan for an increase or decrease in demand for staffing.
- Review actual and projected demand for beds in the last 24 hours and work out the cause of any issues.
- Check the average length of patient stay at a glance to see if it meets the accepted targets.
- See how many patients are currently in ED or projected to arrive over the next day or week and plan staffing levels to cope with the number of admissions expected.
- Identify outliers and off-service patients so you can implement a push/pull strategy to relocate them if appropriate.

- Understand projected staffing requirements as compared to patient demand on day of care and up to 7 days in advance.
- Visualize projected staffing against your roster and projected patient demand.

What to look at:

- See current occupancy and capacity at individual unit and program levels
- The Hospital Status dashboard and Census Matrix report provide views of how many patients are currently in each unit and which specialties they are in, providing easy identification of off-service patients.
- Recalculating every day based on the morning's starting occupancy, Projections provide a view of where the hospital occupancy will be for the next 1 – 6 days. Projections calculate using normal behavior of patients in and out for each day of week. Projections can provide early warning of capacity issues, allowing intervention before issues arise.
- Projections are generated from both a unit and service perspective, allowing managers to see where capacity issues may occur, and which services are exceeding capacity.
- PG Today dashboards show the current and projected demand by Planning Group.
- Yesterday dashboards show how the hospital got to its current position by comparing projected levels of activity with what actually happened over the last 24 hours.
- There are user-configurable views available through the Web Portal pages.

Places to look:

- PG's Today dashboards
- ED Today Dashboard
- Yesterday Dashboards
- Reporting – On Demand reports and dashboards

SERVICE MANAGEMENT

Service Directors

CP helps you to:

- Monitor the discharge time of day to make sure it meets the targets set to meet key performance indicators (KPIs), it's not the most important thing for service managers to do.
- Help make decisions concerning outliers and off-service patients so Managers can implement a push/pull strategy to relocate them if appropriate
- Facilitate and formulate long-range planning decisions for the Service
- Long-term plans can be made using the Capacity Planner forecasting tools. Inputs of the number of patients expected and the time they are expected to spend in each service allows plans to include changes in expected demand or service changes.
- The "Planner" dashboards provide charts and metrics showing how the hospital is tracking against plans made.
- Service-based reports allow you to see in real-time how your service is tracking against plans.
- Service-based projections allow you to see how your service is likely to track over the coming 1-6 days, allowing for early intervention before problems arise.
- Length of stay by service can be monitored.

Places to look:

- PG Today Dashboards
- Planning Dashboards
- Yesterday Dashboards
- Reporting – On Demand reports and dashboards

UNIT MANAGEMENT

CP helps you to:

- Easily see current and projected occupancy for the unit and plan for an increase or decrease in demand for staffing and beds
- Review activity in the last 24 hours to see if discharges, discharge times or other targets were met and look for opportunities for improvement
- View the average length of patient stay to see if it meets the accepted key performance indicators (KPIs)
- See how many patients are currently in ED waiting for inpatient beds in their area(s) and plan staffing levels to cope with the number of admissions expected
- Understand projected staffing requirements as compared to patient demand on day of care and up to 7 days in advance
- Visualize projected staffing against your roster and projected patient demand.

What to look at:

- Individual unit metrics are displayed on PG Today dashboards showing metrics such as occupancy and length of stay.
- Linked staffing reports on the Hospital Today or PG Today Dashboards

Places to look

- PG's Today dashboards and linked reports
- Reporting – On Demand reports and dashboards (See On Demand Report section for examples.)

ED/ER MANAGEMENT

Emergency Managers, Emergency Directors

CP helps you to:

- Understand and visualize the projected activity in the unit for the next few hours and days, enabling you to adequately plan resources to match projected demand.
- On day of care, easily identify how many patients are waiting to be seen and how long they have been waiting.
- Determine whether planned staffing levels need to be adjusted based on occupancy projections for the next four to eight hours and 7 days in advance.
- Easily identify where beds are available within the hospital to help facilitate moving patients admitted in ED.
- Monitor wait times to make sure patients are being seen within safe time frames.

What to look for:

- ED Today dashboards provide real-time metrics on key ED KPI's such as patient wait times and time spent in the Emergency Department.
- ED Today dashboards also shows admitting services ready to be moved to inpatient beds.
- ED Yesterday dashboards show the previous day's ED presentations and discharges
- Hospital Status dashboards give the Emergency Department a view of the rest of the hospital and potential bottlenecks.
- The Hospital Status dashboard shows the locations of unoccupied beds.

Places to look

- ED Today dashboard
- ED Yesterday dashboard
- Hospital Status dashboard
- Reporting – On Demand reports and dashboards

PATIENT FLOW

Patient or Bed Placement Director, Clinical Coordinator

CP helps you to:

- Identify current and projected capacity across the hospital so you can proactively plan days in advance.
- Move to a proactive planned approach and away from reactive bed management.
- Provide data and reports for business intelligence and strategic reporting.
- Monitor admissions vs discharges to avoid capacity issues.
- Facilitate ALC (Alternate Level of Care) patient movements
- Check whether key performance indicators (KPIs) are being met (e.g., discharge times, average length of stay and Emergency wait times).

Places to look

- Hospital Today dashboard and linked Census Matrix report
- ED Today dashboard
- Hospital Status dashboard
- Projected Patients In and Discharges report

Capacity Planner Viewer

NAVIGATION



HELP

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

TODAY

The Today Dashboards provide views of the current state, along with projections for the next 6 days. The default view when clicking **Today** will be different for each customer. For multi-facility customers, it may reflect a regional view. If a single facility, then the Hospital Today Dashboard is the default view.



Here is an example of what can be included on a Region Today Dashboard. It reflects some key metrics for patient volumes across the entire region.

00 Region Today

Regional Occupancy Current Status

Critical Care	% Occ.	Medicine	% Occ.	Surgery	% Occ.
GH	50%	CH	90%	CH	66%
SHS	89%	GH	84%	GH	84%
UPH	89%	MHP	89%	MHP	89%
Combined	84%	NHS	95%	NHS	95%
		SHS	55%	SHS	55%
		UPH	86%	UPH	86%
		Combined	84%	Combined	82%

Regional Emergency/Urgent Care Status

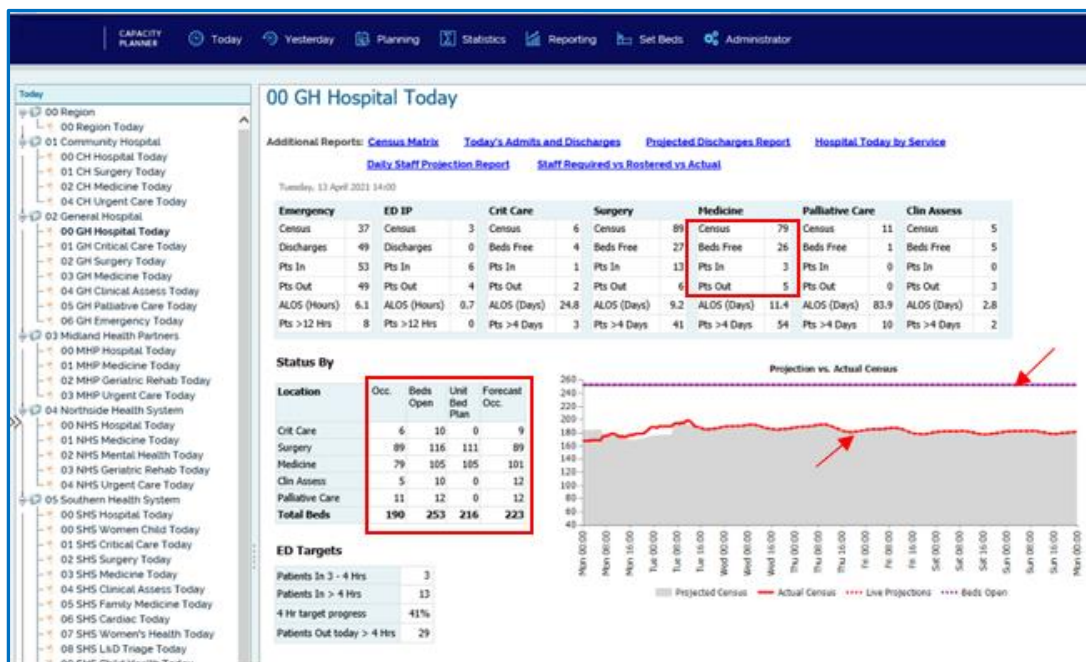
Emergency-Urgent Care	Census	LOS
CH	32	4.6
GH	24	9.9
MHP	21	3.7
NHS	45	6.5
SHS	40	6.5
UPH	83	8.3

HOSPITAL TODAY

This dashboard gives global information about the hospital’s current status. It provides a summary view of the hospital, and visibility of how individual services are contributing to the overall picture.

This dashboard displays:

- **Census** by Planning Group – current number of patients in beds
- **Live Projections** – updated projections with every dashboard refresh as changes are received
- **Beds Open** – the number of beds in a Planning Group that are staffed and can be used for a patient
- **Beds Free** – How many beds are available (Beds open – less Beds free)
- **Pts In** – This includes admissions and transfers into a Planning Group from another location in the hospital
- **Pts Out** – This includes discharges and transfers out of a Planning Group
- Does the hospital have too few/adequate/excessive capacity (beds planned/open) based on the expected demand?
 - The **Unit Bed Plan** reflects the original bed plan.
 - The **Beds Open** or dotted purple line reflects the actual beds open, including any changes to the plan.
 - The **Forecast Occ** shows the budgeted long-range bed plan.



CENSUS MATRIX

This report is set as a link from the Hospital Today dashboard and shows current occupancy by unit and service.

The Census Matrix is a key report, popular for review in the daily planning meeting and used throughout the day by the Bed Managers. It provides visibility of:

- The number and service of patients by Planning Group, to individual unit level.
- The number of patients by Service Group, to individual service level.
- Visibility of number and location of ‘off-service’ patients.

Census Matrix Wednesday, 12 May 2021 14:00

Planning Group	Unit	Service Totals	Units under their Planning Groups															
			CICU Care				Surgery				Medicine				Cardiac			
			CCUO (SHS)	ICCS (SHS)	ICMS (SHS)	SESUR	SNSUR	SSSUR	SWSUR	3SMED	4EMED	4SMED	4WMED	2ECA	2NCA	2SCA	2WCA	
Beds Open			8	14	14	5	20	24	20	24	30	10	34	4	32	33	16	
Census			5	11	10	3	16	22	26	23	25	7	28	8	30	19	8	
Surgery																		
	SHS Surgery / A Service	7						4	3									
	SHS Surgery / Acute Care Surgery	29			2	1	2	11	13									
	SHS Surgery / B Service	7						2	5									
	SHS Surgery / Otolaryngology	3				1			2									
	SHS Surgery / Plastic	2							2									
	SHS Surgery / Urology	7						6	1									
	SHS Surgery / Vascular	9				1		8										
Medicine																		
	SHS Internal Med / A Service	21			1			2		15		4	16					
	SHS Internal Med / B Service	23			3					21	3							
	SHS Internal Med / C Service	22			1													
	SHS Internal Med / General	2			2													
	SHS Internal Med / Nephrology Renal Hypertension	4								4								
	SHS Internal Med / Non-Teaching Other	21						3		6	4		12					
	SHS Internal Med / Oncology	2								2								
	SHS Internal Med / Respiratory	1			1													
Cardiac																		
	SHS Cardiac Science / Cardiac Cath Lab	27															19	
	SHS Cardiac Science / Cardiology B Service	1																
	SHS Cardiac Science / Cardiology C Service	2																
	SHS Cardiac Science / CIE Care Cardiology	8																
	SHS Cardiac Science / Defibrillation	16																
	SHS Cardiac Science / Electrophysiology	13			1													
	SHS Cardiac Science / Pacedriver	6			2													
	SHS Cardiac Science / Transcath	9																
Women's Health																		
	SHS Gynecology / General	14																
	SHS Obstetrics / General	35																
Child Health																		
	SHS Pediatrics / Neonatology	25																
Mental Health																		
	SHS Psychiatry / Adult General	32																
Emergency																		
	SHS Emergency / General	43																

In addition to showing patients located within their home Planning Group, CP also displays where there are patients who are considered ‘off-service’ or not currently in their home units. In the above screenshot, the following is displayed.

- All the patients in the Medicine and Cardiac units were placed appropriately in their home units (shown in blue background).
- There are 5 Medicine patients in Surgery units that are considered off-service patients (outlined in orange above).
- The current total census is displayed for each unit to show where there are available beds to place any off-service patients in their appropriate units.
- Units like 3SMED and 2NCA are both shown as over-capacity (more patients than beds opened).
- Therefore, this report can easily display possible opportunities to relocate off-service patients, as well as identifying which units may be over-capacity and require more resources.

Using the Report

Use this report to:

- see at a glance where patients are located
- understand current occupancy and capacity

Understanding the Report

This report updates regularly. The date and time when the information report was last updated is displayed at the top of the screen. It does not update when opened in a new tab.

Rows show the patients in each service, and the columns show where they are located. Locations are grouped by planning group.

Beds Open is the number of beds available for use in each unit. **Census** is the number of beds actually occupied in each unit at the time of the report.

Planning

Bed and Nurse Managers can check this report throughout the day to monitor where patients are located and identify whether moving patients will help manage capacity.

STATUS BY SERVICE

Status by Service provides a Planning Group and service view of occupancy, activity trends and LOS/long-stay patient trends.

This is a key report reviewed by Planning Groups daily to monitor trends and identify potential risk factors early.

Status By Specialty												
Summary Report of Patients Currently in Hospital per Specialty												
Date: Friday, October 18, 2019, 06:45												
Specialty	Occupancy	Current Patients ALOS	Current Patients > 10 Days	Admissions Last 24 Hours	Transfers In Last 24 Hours	Discharges Last 24 Hours	Transfers Out Last 24 Hours	Admissions Last 7 Days	Transfers In Last 7 Days	Discharges Last 7 Days	Transfers Out Last 7 Days	ALOS Patients Discharged Last 7 Days
Cardiac	37	4.9	5	11	6	5	6	53	25	41	34	3.1
Card - Angiogram	10	2.3	0	4	0	0	0	15	5	13	7	2.8
Card - PTCA	2	1.0	0	0	2	0	0	0	2	1	1	1.3
Cardio Aortic Valve	2	9.8	1	0	0	0	1	2	1	0	2	0.0
Cardio CABG	4	6.2	1	1	2	0	1	3	5	0	7	0.0
Cardio Mitral Stenosis	0	0.0	0	0	0	0	0	0	0	0	0	0.0
Cardiology	12	3.4	1	4	3	4	4	27	5	22	10	2.8
Cardiothoracic Surgery	5	12.9	2	1	0	0	1	4	5	1	5	4.2
Thoracic Surgery	2	3.7	0	1	0	1	0	2	3	4	3	6.2
Medical	90	6.1	16	17	5	19	6	133	31	119	49	4.0
Gastroenterology	1	0.6	0	1	1	2	0	3	5	9	2	5.9
General Medicine	80	5.7	15	15	3	16	6	123	21	101	45	3.6
Immunology	0	0.0	0	0	0	0	0	0	0	0	0	0.0
Medical Withdrawal	1	3.6	0	0	0	0	0	1	0	0	1	0.0
Respiratory Medicine	8	11.1	1	1	1	1	0	6	6	9	2	7.2
Surgical	129	4.2	15	38	33	43	23	190	156	256	87	2.5
Ear Nose Throat	3	4.2	0	2	0	2	1	12	9	18	4	1.6
General Surgery	48	3.6	3	14	16	17	11	83	56	89	36	2.1
Gyn BS Other	6	1.4	0	1	6	6	1	4	22	21	3	1.8
Gynaecology	3	1.2	0	2	0	3	1	17	4	17	4	1.2
Neurology	9	3.8	1	2	1	2	1	9	5	8	3	2.9
Neurosurgery	10	8.1	3	2	0	1	0	10	1	9	7	3.3
Ophthalmology	4	2.0	0	1	5	2	2	7	19	17	7	0.7
Orthopaedics	31	4.9	5	8	3	2	6	32	22	36	19	3.8
Urology	5	3.0	1	3	1	4	0	8	11	20	2	2.3
Vascular Surgery	10	5.5	2	3	2	4	1	8	10	21	5	5.9
Total	256	5.0	36	66	44	67	35	376	212	416	170	3.0

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Report Generated: 10/18/2019 07:31 AM

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Occupancy As At 06:45 Last 7 Days								
	Sat 12 Oct	Sun 13 Oct	Mon 14 Oct	Tue 15 Oct	Wed 16 Oct	Thu 17 Oct	Fri 18 Oct	
Cardiac	37	36	35	37	35	31	37	
Card - Angiogram	14	12	6	7	8	6	10	
Card - PTCA	0	0	0	0	0	0	2	
Cardio Aortic Valve	1	1	2	3	2	3	2	
Cardio CABG	3	3	5	4	1	2	4	
Cardio Mitral Stenosis	0	0	0	0	0	0	0	
Cardiology	10	11	12	14	15	13	12	
Cardiothoracic Surgery	4	4	5	5	6	5	5	
Thoracic Surgery	5	5	5	4	3	2	2	
Medical	100	97	100	96	91	93	90	
Gastroenterology	3	3	3	3	0	1	1	
General Medicine	89	86	88	86	84	84	80	
Immunology	0	0	0	0	0	0	0	
Medical Withdrawal	1	1	1	1	1	1	1	
Respiratory Medicine	7	7	8	6	6	7	8	
Surgical	124	110	107	126	126	124	129	
Ear Nose Throat	3	3	5	7	9	4	3	
General Surgery	32	31	35	39	41	46	48	
Gyn BS Other	7	4	2	5	4	6	6	
Gynaecology	3	1	2	8	5	5	3	
Neurology	7	6	7	7	6	9	9	
Neurosurgery	13	11	10	10	8	9	10	
Ophthalmology	2	0	1	4	3	2	4	
Orthopaedics	33	31	27	27	27	28	31	
Urology	6	6	3	6	8	5	5	
Vascular Surgery	18	17	15	13	15	10	10	

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Report Generated: 10/18/2019 07:31 AM

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Using the Report

This is an important report for planners and patient flow analysts who need to see the data in detail.

Use this report to see patient activity for different services on one screen. This report can help to identify trends and manage issues as (or before) they arise.

Understanding the Report

This report updates as it is run on demand.

This report shows data for the last 24 hours and the last seven days.

Page One

The first page of the report gives a detailed breakdown of occupancy and related metrics for each service.

Page Two

The table on the second page shows the day-by-day change in occupancy at the same time over the last seven days for each service.

To view this table, use the navigation menu at the top of the report to view the second page.

Planning

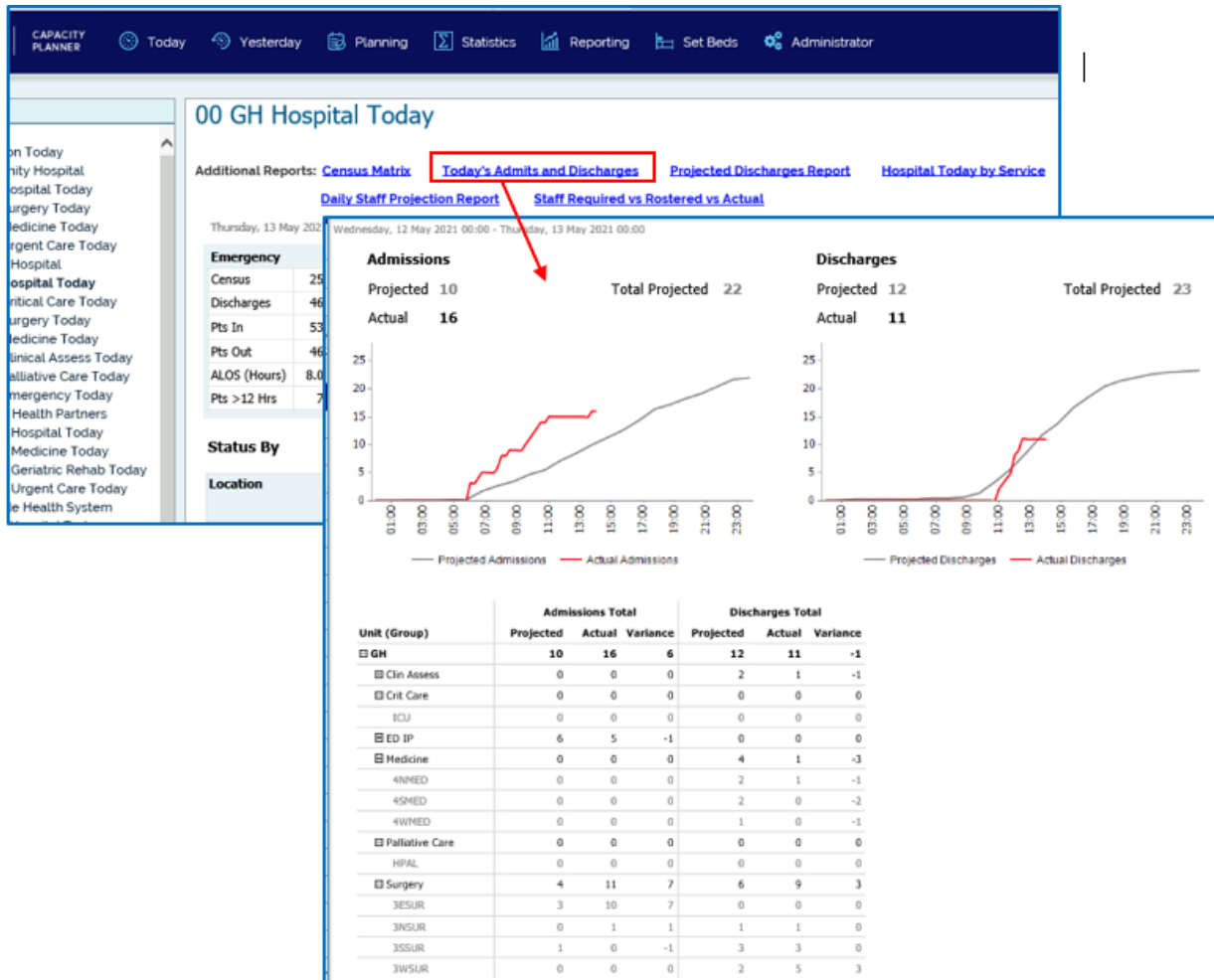
Planners and patient flow analysts can use this report at the daily planning meeting to monitor trends and help identify the cause of any capacity issues.

TODAY'S INS AND OUTS

This report is set as a link on the Hospital Today dashboard (named "Today's Admits and Discharges") and provides a cumulative view of patient activity for the day (usually set to reflect since midnight).

The graphs show Inpatient activity – projected and actual Admissions and Discharges.

The table shows the same information by Planning Group and individual units.



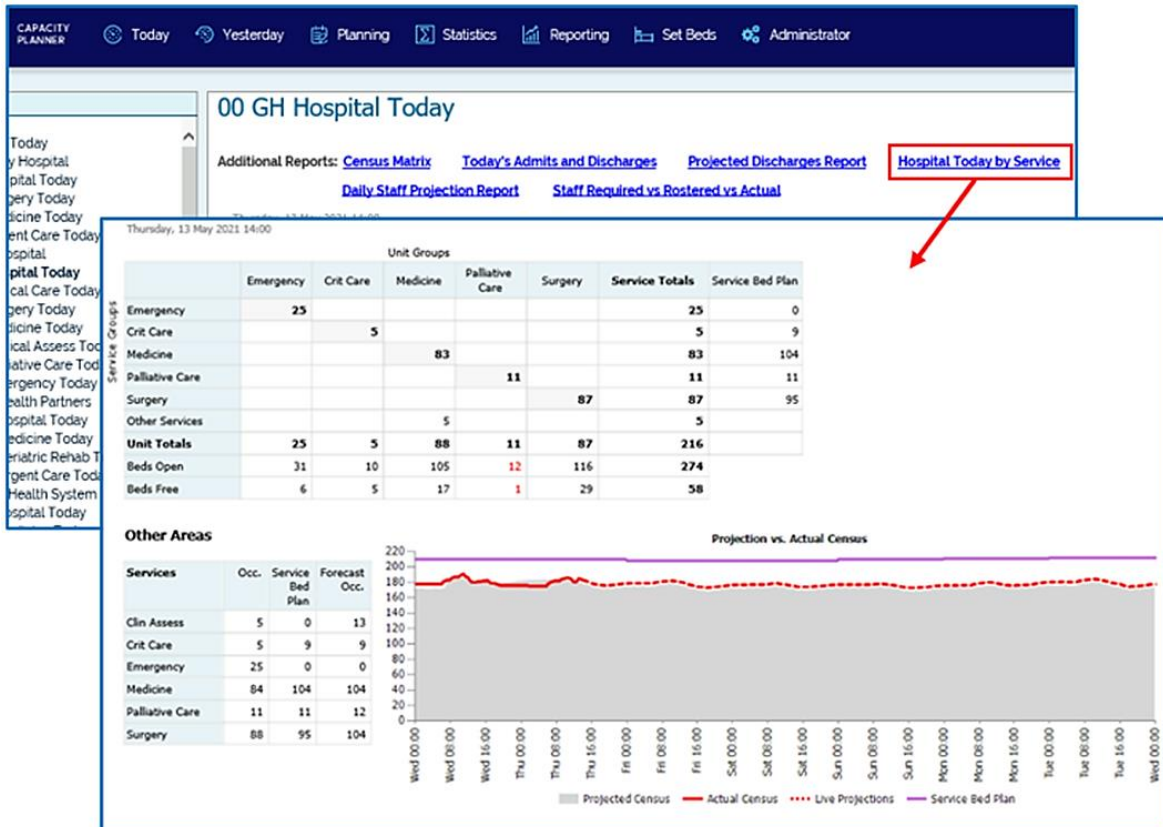
HOSPITAL TODAY BY SERVICE

This report is built as a link from the Hospital Today dashboard and displays global information about the hospital's occupancy status and bed capacity across Planning Groups. This can be compared from both a unit and service perspective. It also shows a Projection vs Actual Chart, comparing current occupancy against today's projection and projected occupancy for the coming six days.

The PG Specialties Dashboard report can give the status by each service in the Planning Group, this includes current occupancy and ALOS, projected activity and actual activity for today and tomorrow. This can be run on demand if needing to see the LOS for Orthopedic Surgery vs. General Surgery, as an example.

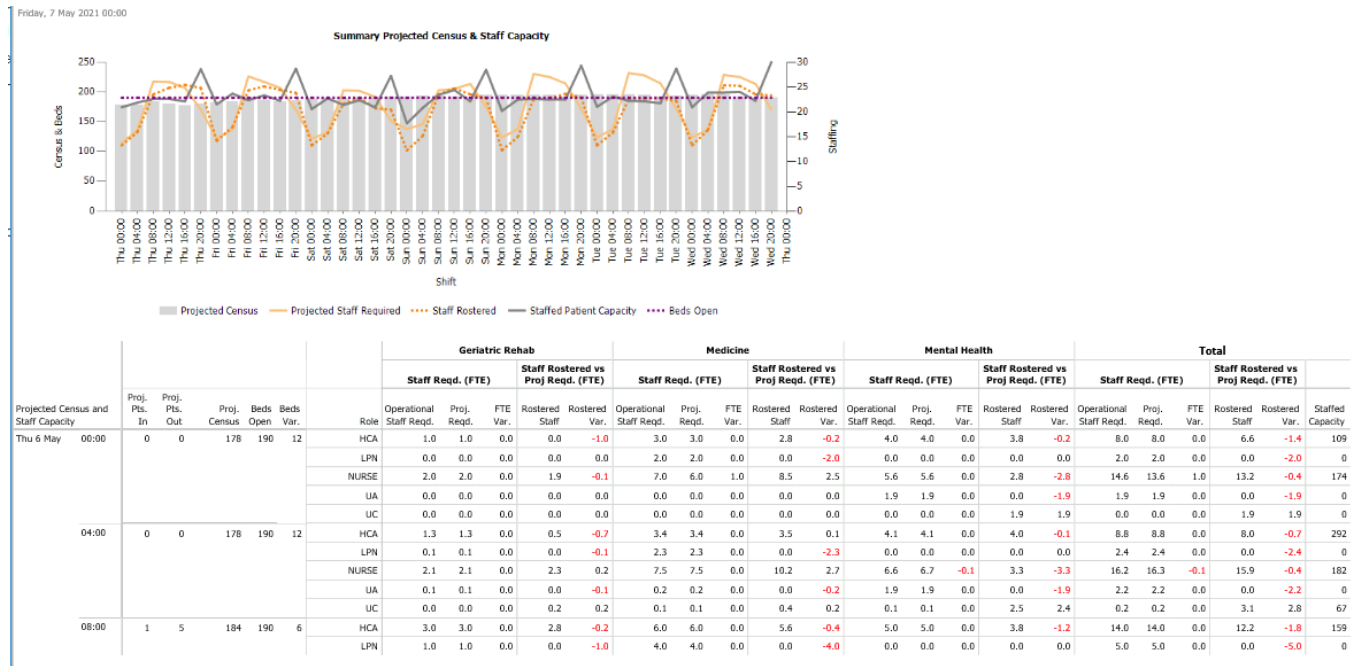
What you're looking for:

- Current occupancy
- Off-service patients
- Grey area on the main chart and the projected occupancy for the next six days
- How the hospital is tracking against the projections:
 - Solid red line on the chart is the actual occupancy over the past 24 hours.
 - Dashed red line on the chart reflects any changes to projections based on today's volumes.
 - Are Live Projections different from the grey area projections?
- Bed capacity (Service Bed Plan's purple line)



Daily Staff Projection Report

This report is built as a link on both the Hospital Today (Summary level) and PG Today dashboards (PG and Unit levels). It supports safe staffing by displaying the number of scheduled staff on shift compared to a projected number of staff required, as well as bed capacity compared to projected occupancy. It can be used by Directors and Service Managers to see how staffing looks across the hospital for the next several days. Refer to the "On Demand Reports" section for more details on interpreting this report.



STAFF REQUIRED VS ROSTERED VS ACTUAL

Used to view staff rostered (scheduled) and actuals compared to the projected staff requirement based on projected census. See more details under "On Demand Reports".

- Separate levels for entire hospital, Planning Groups, and units by role
- Roles on separate pages – each with their own chart



SBH1-3		SBH4-7		Total	
Rostered Var.	Actual Var.	Staff Req.	Rostered Var.	Actual Var.	Staff Req.
1.1	1.1	1.4	0.4	0.4	6.0
1.2	1.2	1.6	0.4	0.4	6.6
2.2	2.2	1.5	0.4	0.4	8.1
1.3	1.3	1.5	0.5	0.5	8.5
1.2	1.2	1.4	0.4	0.4	8.2
1.2	1.2	1.5	0.4	0.4	8.4
1.1	1.1	1.5	0.4	0.4	6.1
1.1	-0.9	1.6	0.4	-1.6	6.6
0.3	-1.6	1.5	0.4	-1.5	8.1

PLANNING GROUP TODAY

These dashboards provide a more detailed view of the same information separated out by Planning Group. They include more detailed unit-level metrics.

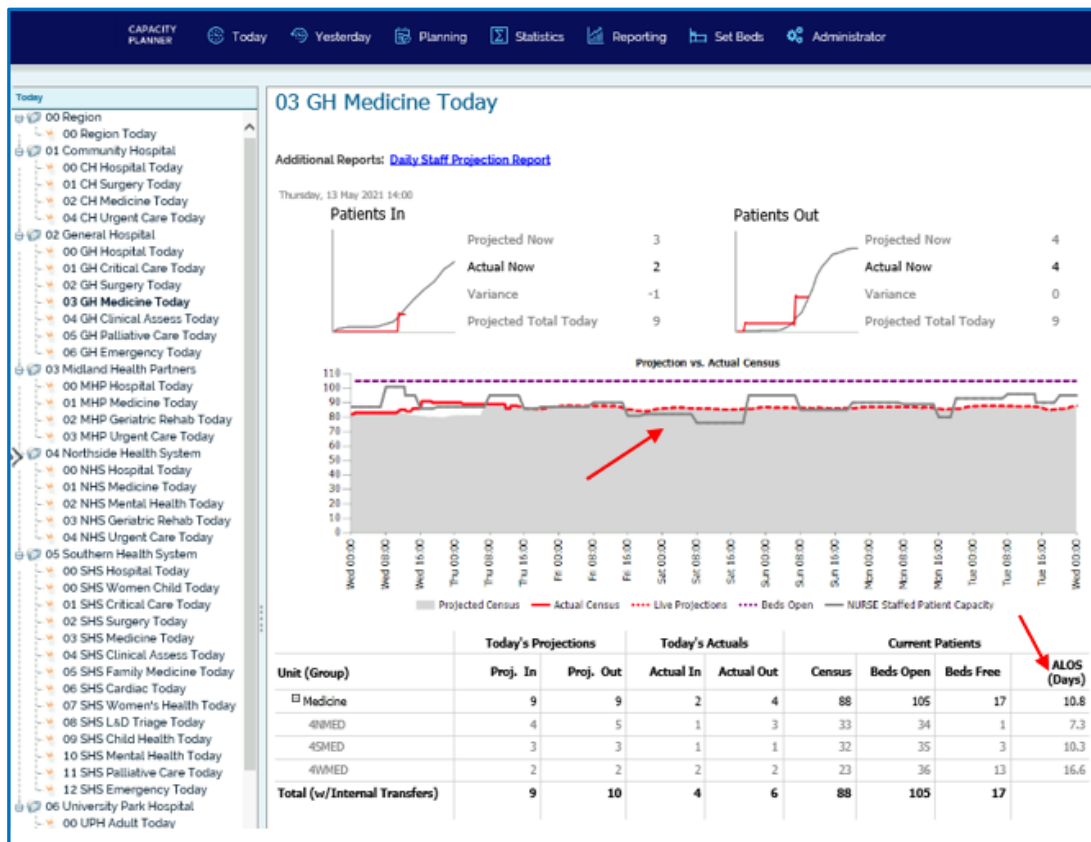
The Nurse Managers and Charge Nurses will find this particularly useful for their area.

The graphs at the top of the dashboard include -

- **Patients In** – includes admissions and transfers into this Planning Group from another location in the hospital
- **Patients Out** – includes discharges and transfers out of this Planning Group to another location in the hospital
- **Staffed Patient Capacity** – shows the number of patients that can be cared for by the scheduled [nursing] staff

The table at the bottom of the dashboard includes:

- Projected and actual Patients In and Patients Out
- Current census, beds open, beds free and ALOS for each unit

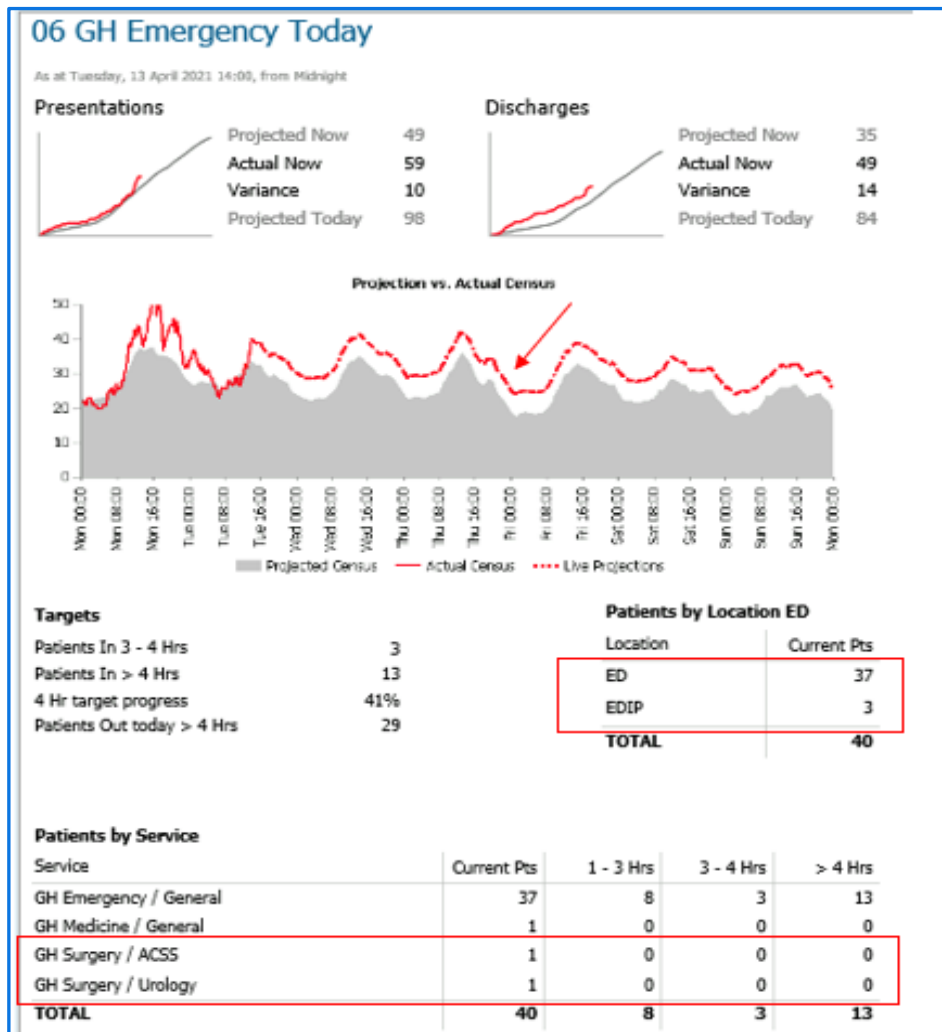


EMERGENCY TODAY

The Emergency Today dashboard provides key status information and KPIs for the Emergency Department(s), as well as projected vs. actual occupancy over the coming days. It allows users to monitor and analyze Emergency performance and proactively plan for the days ahead.

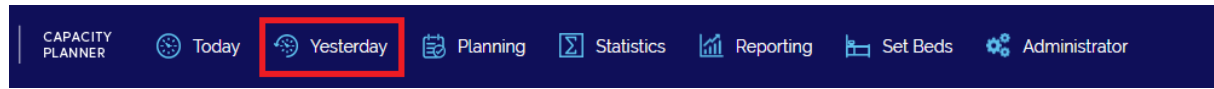
This dashboard displays:

- **Presentations and Discharges** – projected Patients In and Out of Emergency for the 24-hour period midnight-to- midnight
- **Projection vs. Actual Census** chart shows hour-by-hour projected occupancy for the next six days
- **Targets** – displays the number of patients in the ED between 3-4 hours and >4
- **Patients by Location ED** – Current ED occupancy by location (locations included in the 4-hour target)
- **Patients by Service** – current occupancy by service and time in the department or time since admission for those awaiting inpatient beds



YESTERDAY

The Yesterday dashboards display activity for the previous 24 hours (midnight-to-midnight) and update each morning. The default for these would be similar to the Today dashboards and display either a regional or hospital-level view of the previous day's admissions and discharges.



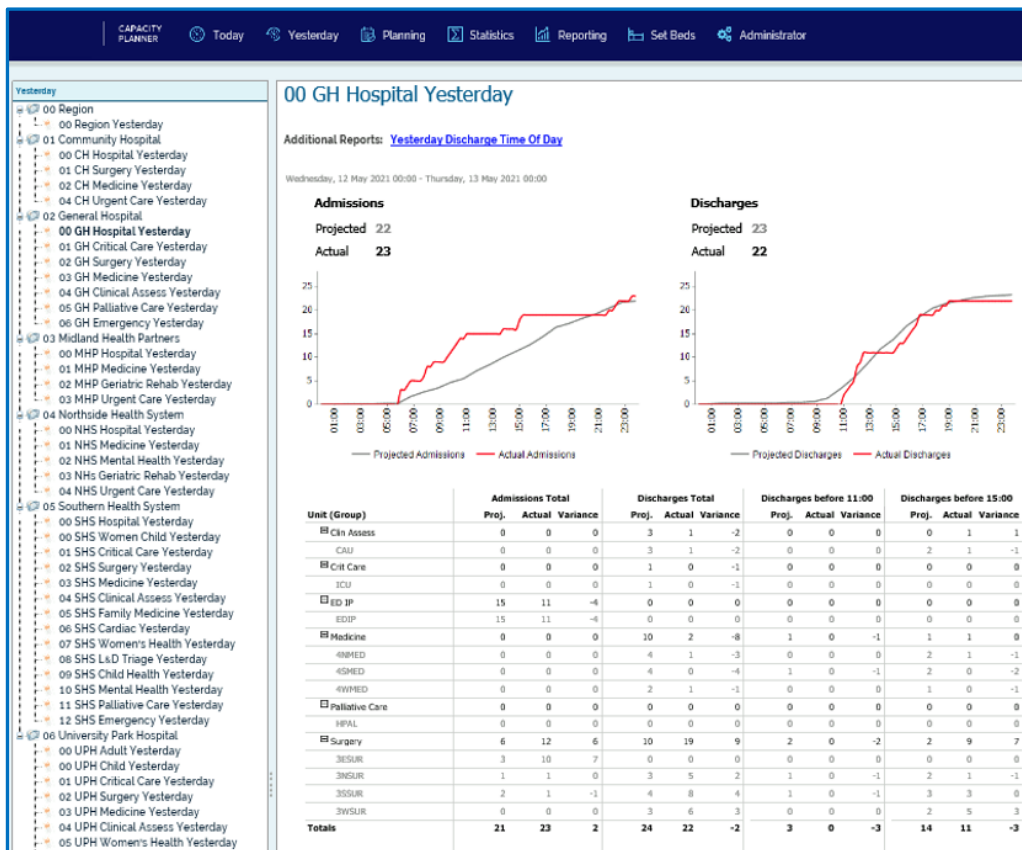
HOSPITAL YESTERDAY

The report provides an hourly view of patient activity at Unit level for yesterday.

The projections are based on 'normal' activity (i.e. Admissions and Discharges). If the hospital's occupancy is significantly different from what was projected/expected, this information helps to understand what caused the variation.

What you're looking for:

- Is current occupancy where it was projected to be?
 - If not, what changed?
- Admissions or Discharges?
 - What unit(s) had a significant variance?



TRANSFERS MATRIX

This report provides information on external and internal transfers within a healthcare facility for the previous day (midnight-to-midnight). It shows where patients have been admitted to and, in the case of internal movements, shows where they have come from and moved to. This report is useful to view and track patient transfers. It is built as a link on the Hospital Yesterday Dashboard.

What you're looking for:

- Direct admissions
- Transfers from external locations (e.g. ED hold areas, Day Surgery, etc.)
- Transfers from internal areas (e.g. patients being transferred from a medical unit to a surgical unit)

00 SHS Hospital Yesterday

Additional Reports: **Yesterday Transfers** Discharge Time Of Day Yesterday Discharge Time of Day

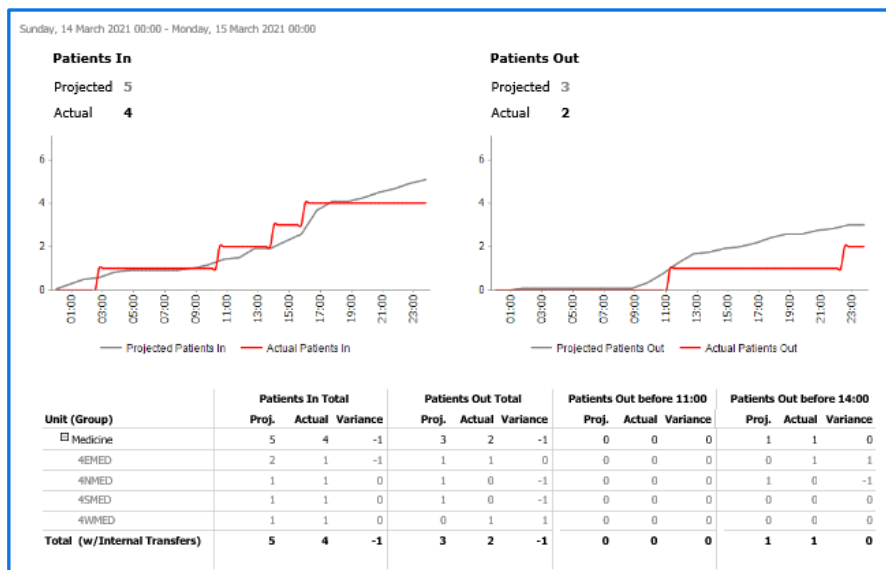
Wednesday, 12 May 2021 00:00 - Thursday, 13 May 2021 00:00

Yesterday Transfers Matrix - PG Detail
Wednesday, 12 May 2021 00:00 - Wednesday, 12 May 2021 23:59

	2ECA	2NCA	2SCA	2WCA	3EFM	3SMED	4EMED	4SMED	4WMED	5ESUR	5NSUR	5SSUR	5WSUR	6NMH	6SPAL	CAU	CCUO (SHS)	ICCS (SHS)	ICMS (SHS)	Planning Group Total	
Direct Admissions	19	2	0	0	1	0	0	0	0	0	0	3	1	9	1	1	0	3	0	0	40
Transfers from External Locations:																					
Day Stay	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other Areas	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total External Patients In	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transfers from Internal Locations:																					
ED IP	0	7	0	0	5	0	1	1	3	0	1	0	0	0	0	1	2	0	1	22	
Cardiac	0	2	1	9	0	0	0	0	0	0	0	0	0	0	0	0	0	1	3	0	
Clin Assess	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Crit Care	0	3	5	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Family Medicine	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Medicine	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	
3SMED	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	
4EMED	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
4SMED	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
4WMED	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Mental Health	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Palliative Care	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Surgery	0	0	0	0	0	0	0	0	0	4	3	2	1	0	0	0	0	0	0	0	
Total Internal Patients In	0	12	6	10	6	1	1	1	3	4	4	2	1	0	0	1	3	3	2	22	
Total Patients In	19	14	6	10	7	1	1	1	3	4	4	7	3	10	1	1	1	6	3	2	62

PLANNING GROUP YESTERDAY

The PG Yesterday Dashboards primarily reflect the Patients In and Patients Out for the PG and individual units. It also displays the time patients left the units – using the target times set.



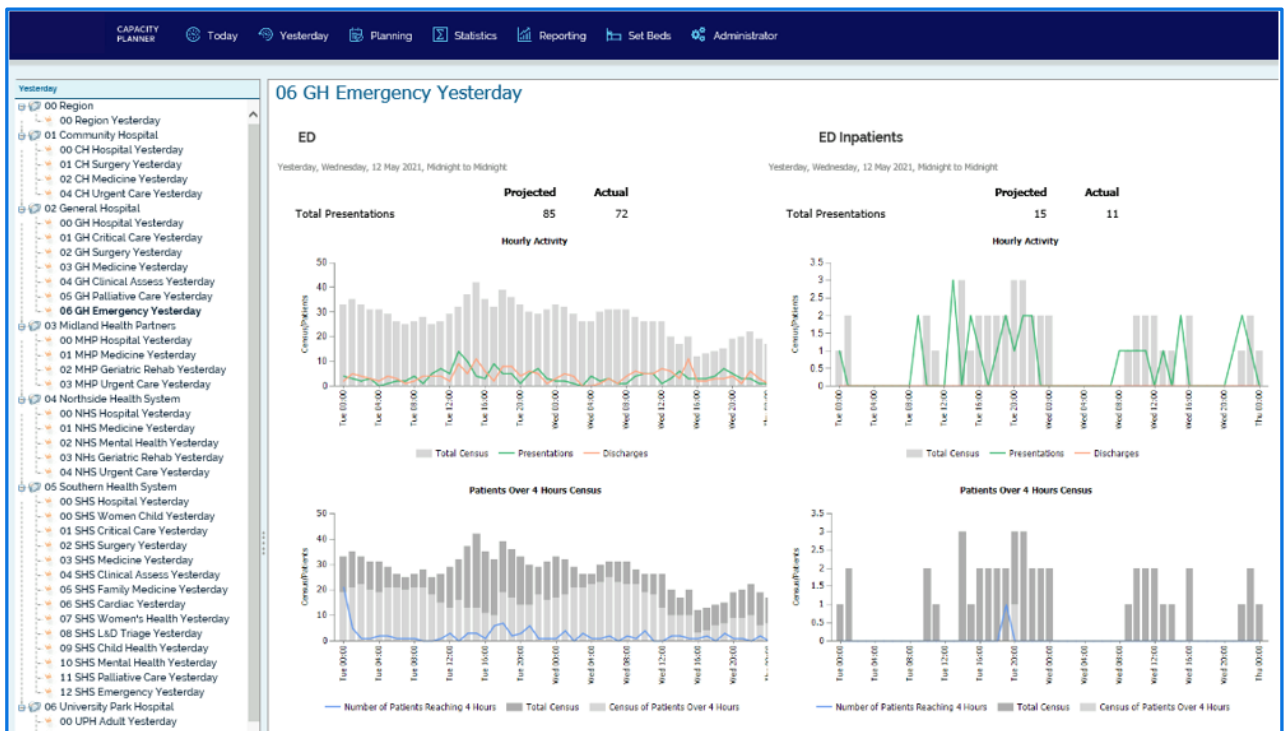
EMERGENCY YESTERDAY

The Emergency Yesterday dashboard provides key KPI's for the Emergency Department over the last 24 hours, from midnight to midnight. This report is used to view the number of patients who presented, hourly occupancy and movements over a 48-hour period and the impact on the department of patients with LOS > 4 hours. This report may be used to establish if there is a trend in times when patients aren't being discharged (for example it could be staffing levels need to be reviewed, certain times of the day etc.).

This same report is shown for both the 'treat-and-release' patients (shown below as "ED") and the patients admitted while in Emergency and waiting for beds (shown below as "ED Inpatients").

This dashboard displays:

- Total presentations – projected vs actual
- Hourly Activity chart – displays hour by hour occupancy and the impact of presentation and discharge rate on occupancy.
- Patients Over 4 Hours Census chart – displays the same hour-by-hour occupancy and the impact of patients who breach the 4-hour target on occupancy.



PLANNING

These are the dashboards that provide information for more long-range planning. Like the Today and Yesterday dashboards, there will be a default dashboard based on whether there is one facility, or a regional view is used.

The Planning Dashboards show how the forecast has tracked in the previous 28 days and how the next 56 days is expected to track. If there has been any unusual activity in the last 28 days, there may be a capacity issue flow that can impact the next 56 days that should be monitored or corrected in advance.

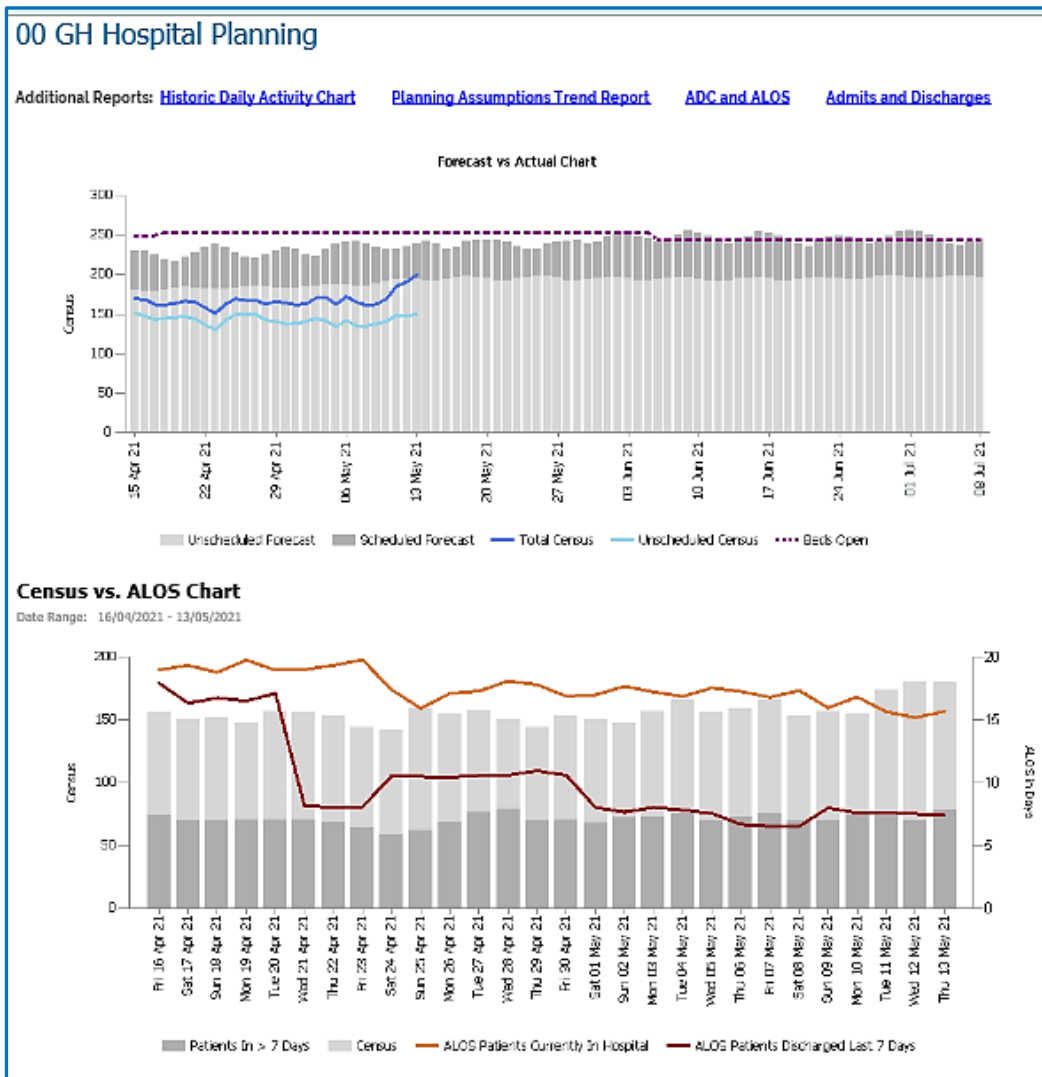


HOSPITAL PLANNING

The Hospital-level Planning dashboards include both displayed reports and linked reports that can look both backwards and into the future.

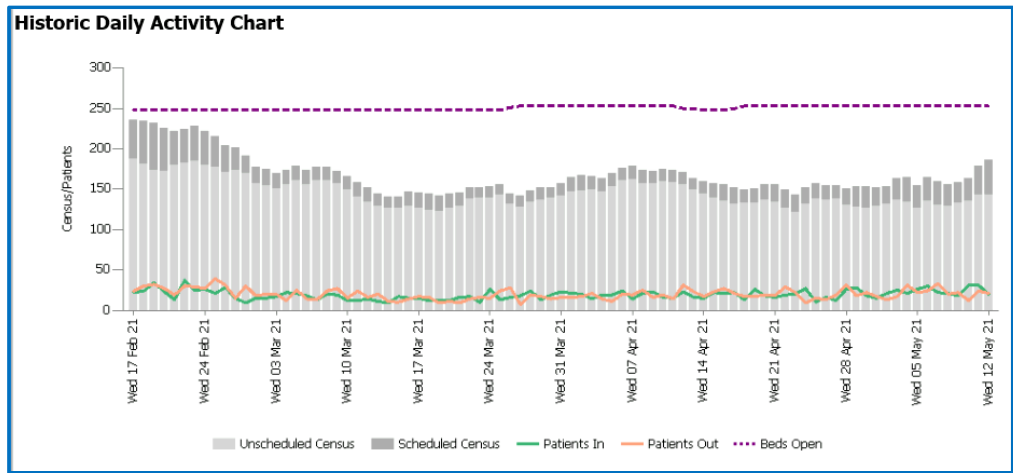
What you're looking for:

- On the Forecast vs Actual Chart, see how the actual census tracks to what was planned (usually based on the budget)
 - Was there something that impacted the volumes over the last 28 days that will continue (e.g. pandemic)?
- On the Census vs. ALOS Chart, see trends in patient discharges
 - Were the patients discharged in the past 7 days within the LOS targets set?



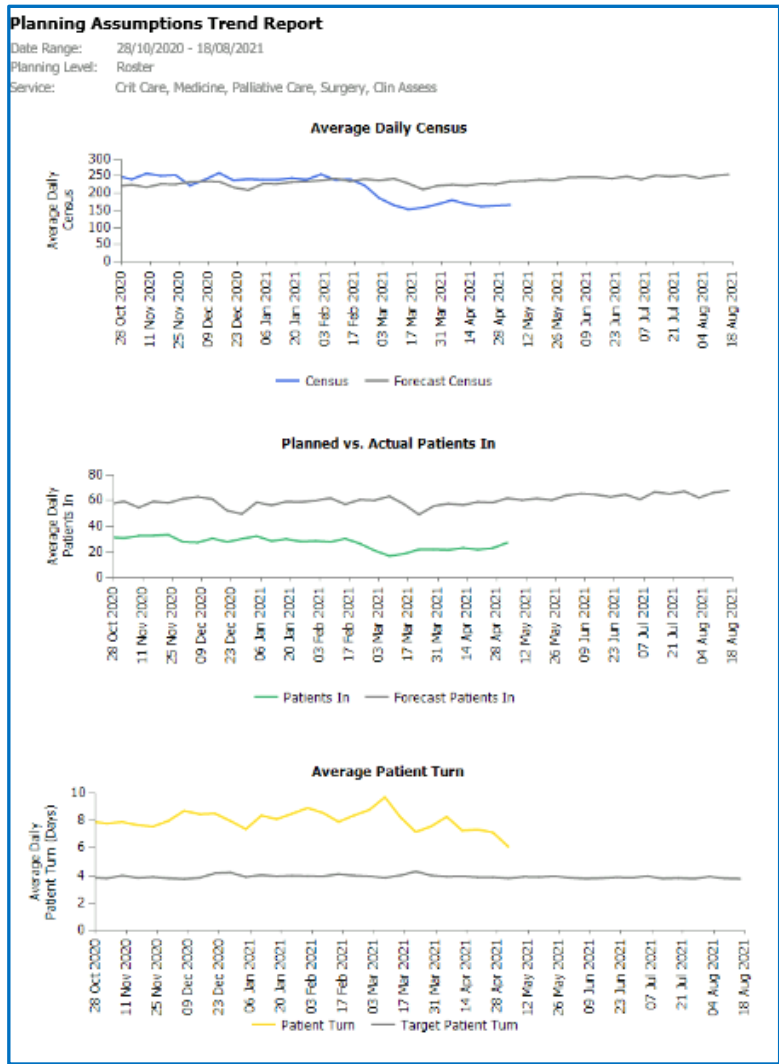
HISTORIC DAILY ACTIVITY CHART

This report gives a summary of average daily occupancy, patients in and patients out for the last 12 weeks.



PLANNING ASSUMPTIONS TREND REPORT

This report gives information about past trends in occupancy, patient activity and patient turn and then compares them to the forecast.

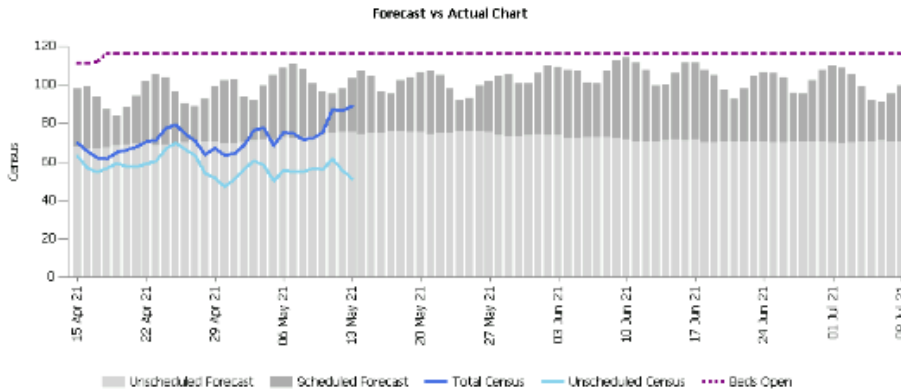


PLANNING GROUP PLANNING

These are similar to the Hospital Planning Dashboards, but only reflect a single Planning Group. At this level, it is easier to see if there are variances for the group.

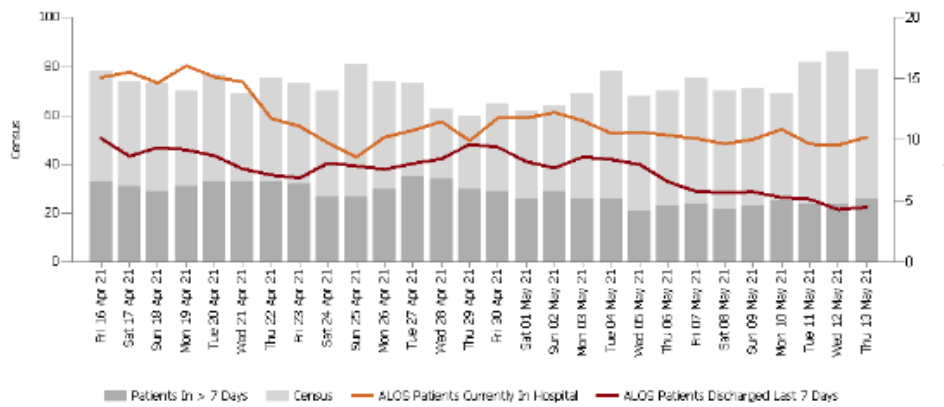
02 GH Surgery Planning

Additional Reports: [Historic Daily Activity Chart](#) [Planning Assumptions Trend Report](#)



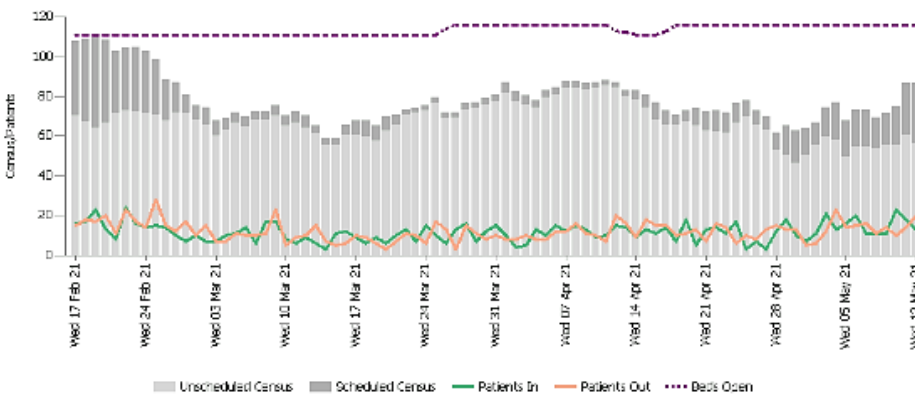
Census vs. ALOS Chart

Date Range: 16/04/2021 - 13/05/2021

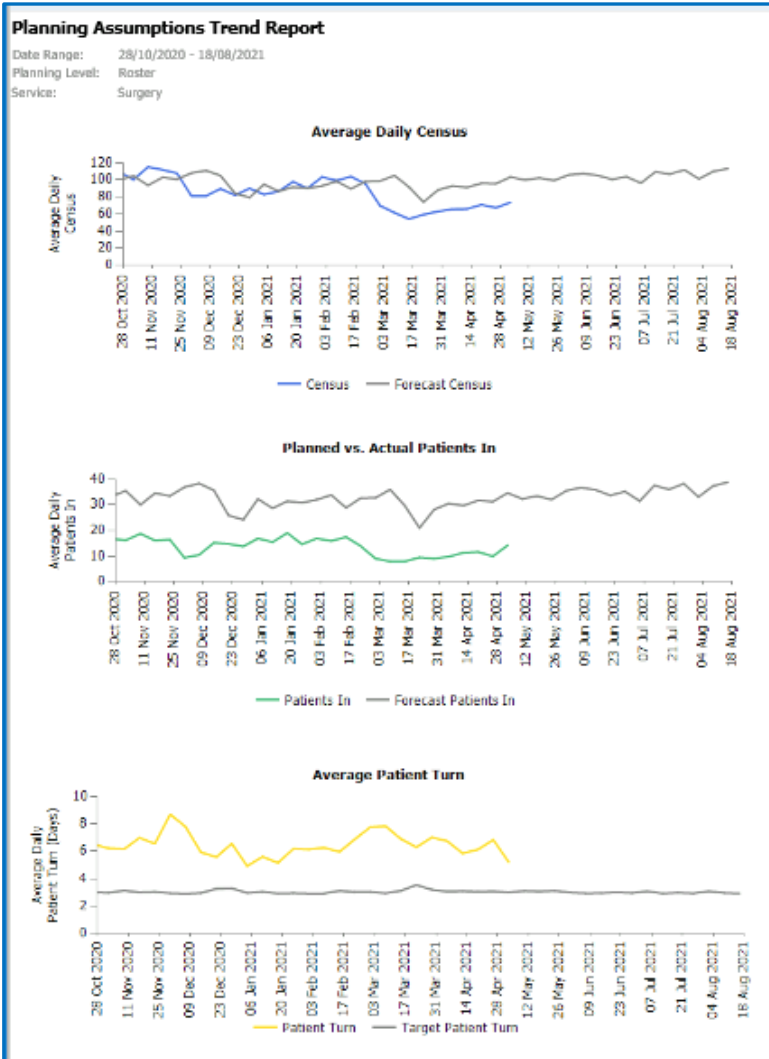


HISTORIC DAILY ACTIVITY CHART

Historic Daily Activity Chart



PLANNING ASSUMPTIONS TREND REPORT



STATISTICS

Statistics are views of summary or encounter-level data that is not available elsewhere. The access to view encounter-level data can be controlled by the security set by the Admins who create them.



Below are a couple examples of Statistics.

- The first one shows end-to-end length of stay for Emergency patients.

Statistics
Last Updated : Friday 05/14/2021 10:57

GH Emergency Total LOS

Emergency End to End ALOS

Ward	Census	End to End ALOS ▲
EDIP	1	13.2
ED	32	18.4
Total	33	18.2

- This example shows encounter-level data that may be limited to only Admins due to including individual patient encounter-level information. This type of view can be utilized for troubleshooting or to monitor patient LOS by physician.

Statistics
Last Updated : Friday 05/14/2021 11:12

All Current Patients

Current Patients

Encounter	Unit Name	Unit ID	Patient ID	Current Service	Patient LOS (Days)	HCP ▼
734664	3NSUR	178	436286	GH Surgery / Orthopedics	8.6	Smith, Melinda
735012	3NSUR	178	454656	GH Surgery / Orthopedics	8.0	Smith, Melinda
738864	3WSUR	175	564969	GH Surgery / Orthopedics	4.0	Smith, Melinda
734746	3NSUR	178	467419	GH Surgery / Orthopedics	8.7	Smith, Melinda
734966	3NSUR	178	562912	GH Surgery / Orthopedics	8.4	Smith, Melinda
741661	4WMED	181	445376	GH Medicine / General	1.0	Grant, Robert F.
733802	4NMED	176	445093	GH Medicine / General	9.1	Grant, Robert F.
737519	4NMED	176	564272	GH Medicine / General	5.1	Grant, Robert F.
742040	4NMED	176	566648	GH Medicine / General	0.5	Grant, Robert F.
739892	4NMED	176	505855	GH Medicine / General	2.7	Grant, Robert F.
741585	4NMED	176	446843	GH Medicine / General	0.6	Grant, Robert F.
738381	4NMED	176	465805	GH Medicine / General	4.5	Grant, Robert F.
738448	4NMED	176	564759	GH Medicine / General	4.0	Grant, Robert F.
738224	4NMED	176	564631	GH Medicine / General	4.6	Grant, Robert F.
739790	4NMED	176	565450	GH Medicine / General	2.8	Grant, Robert F.
727115	4NMED	176	558713	GH Medicine / General	15.9	Grant, Robert F.
730511	4SMED	177	453037	GH Medicine / General	12.7	Elliott, Carolina

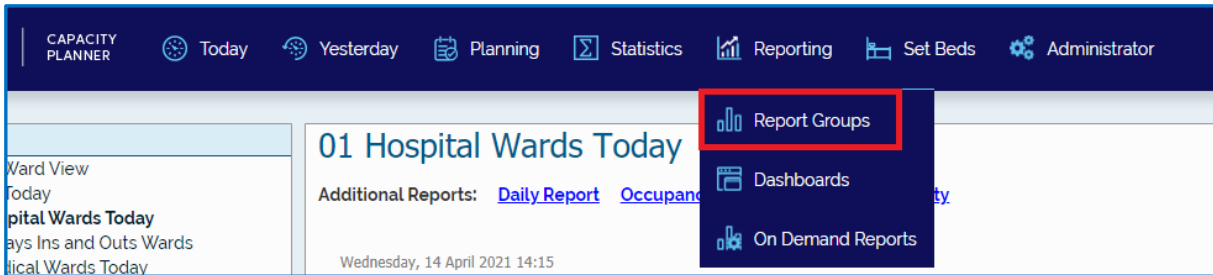
REPORTING



REPORT GROUPS

Reports provide information at a point in time or over a specified time period. All users can run reports to compare and review performance and to view future plans.

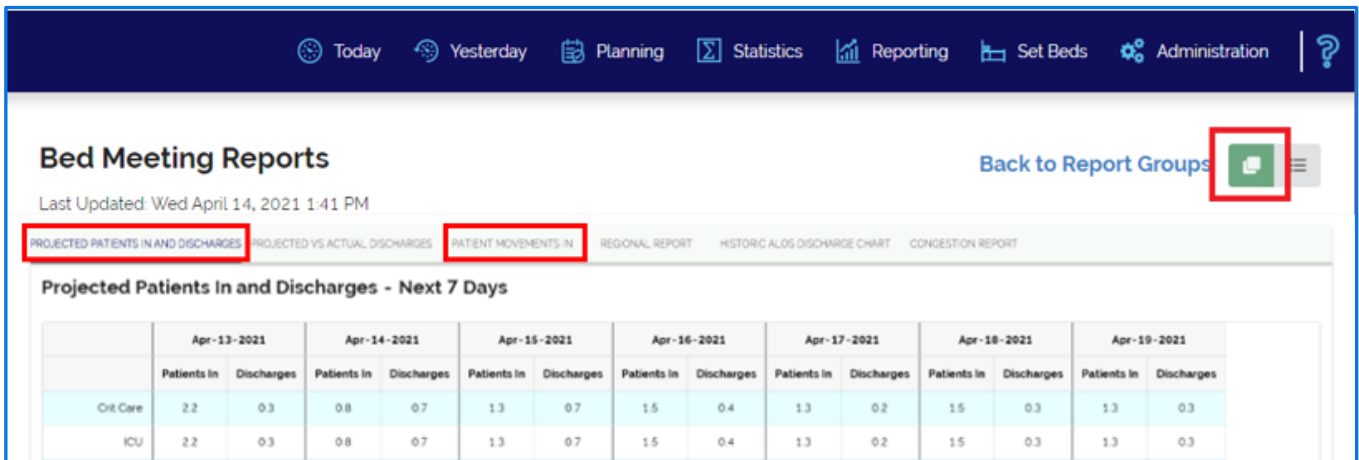
Reports give detailed information for planning groups, units, and services. They cover what happened yesterday and give accurate projections of patient activity and expected occupancy into the future. Report Groups may be created for all users or individual users may be able to create their own (based on access level).



When you run the reports, you have two views to choose from – “Show in Tabs” or “Show as List”. The report content is exactly the same with either choice but is displayed differently. If choosing to use to show as a list instead of the default of tabs, the default changes for that user.

SHOW IN TABS

This button is selected by default to show in tabs. Reports display one per tab, side by side.



SHOW AS LIST

Button to select Show as List shown in top right. Reports display one below the other and navigation is by using the scroll bar on the right.



INDIVIDUAL REPORTS

The following reports are available for use in Report Groups . Those with an asterisk (*) are most-commonly used.

CONGESTION REPORT

Provides a view of hospital congestion data across multiple facilities. It may give an insight into how busy healthcare facilities are and if they will be able to manage demand.

Configuration

Edit Report Parameters for Congestion Report

Custom Name

Planning Groups

Start Time

Red Threshold

Green Threshold

Good Colour

OK Colour

Bad Colour

Report

PROJECTED PATIENTS IN AND DISCHARGES PROJECTED VS ACTUAL DISCHARGES PATIENT MOVEMENTS IN REGIONAL REPORT HISTORIC ALLOS DISCHARGE CHART CONGESTION REPORT DAILY REPORT																			
Today: Friday 05/14/2021 00:00																			
Site	Yesterday's Avg. Occ	Beds Open	Max Capacity (Funded + OCP)	Bed Hd Cap.	Yesterday (Avg.)			Census Today at 00:00			Projected Today at 00:00			Projected Tomorrow at 00:00			Projected Next Day at 00:00		
					CR - Funded	CR - Max Cap.	CR - Bed Hd Cap.	CR - Funded	CR - Max Cap.	CR - Bed Hd Cap.	CR - Funded	CR - Max Cap.	CR - Bed Hd Cap.	CR - Funded	CR - Max Cap.	CR - Bed Hd Cap.	CR - Funded	CR - Max Cap.	CR - Bed Hd Cap.
> CH	54.89	74	94		0.74	0.58		0.74	0.59		0.76	0.6		0.75	0.59		0.7	0.55	
∨ GH	83.64	116	133		0.72	0.63		0.74	0.65		0.69	0.6		0.75	0.65		0.75	0.66	
3WSUR	21.14	35	48																
3NSUR	28.79	40	41																
3SSUR	30.08	36	38																
3ESUR	3.62	5	6																
> SHS	68.8	69	80		1	0.86		0.97	0.84		1	0.86		1.04	0.89		0.98	0.85	
> UPH	168.62	192	204		0.88	0.83		0.9	0.84		0.88	0.83		0.86	0.81		0.86	0.81	

DAILY REPORT

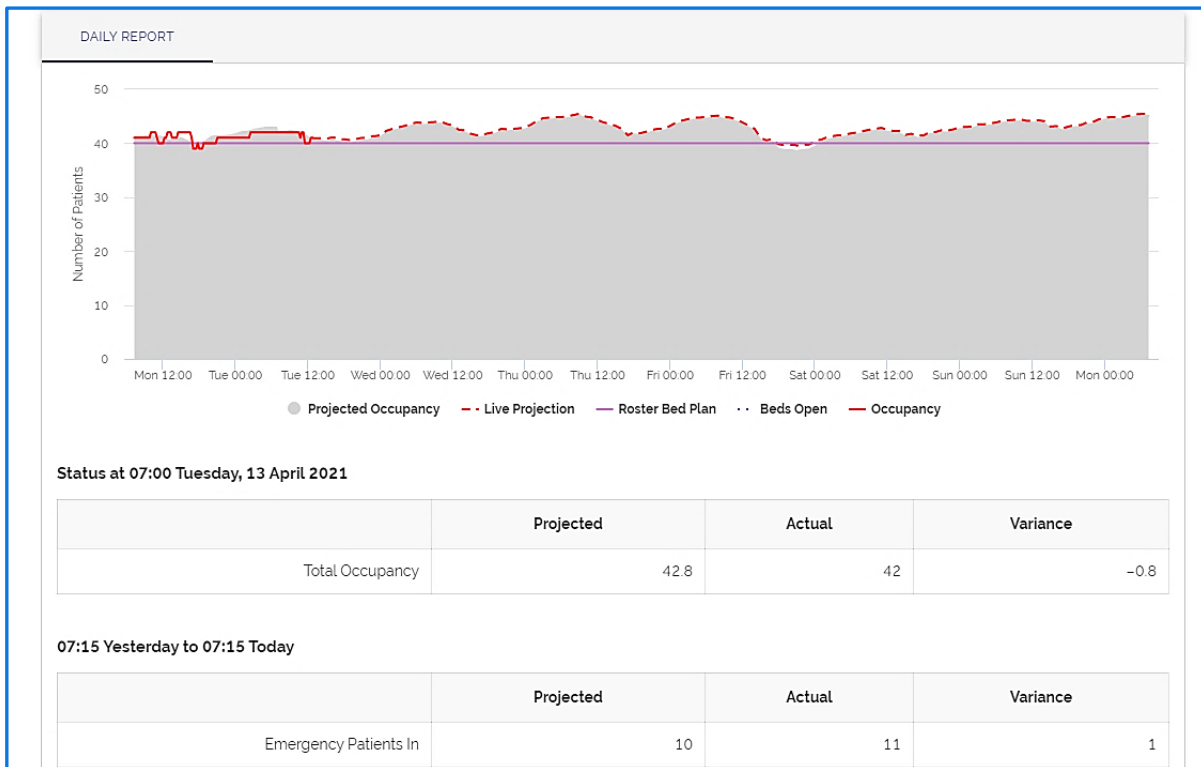
Provides key information for the daily operational meeting and assists with proactive planning for the next 2-4 days.

Configuration

Edit Report Parameters for Daily Report

Custom Name	<input type="text" value="Daily Report"/>
Start Time	<input type="text" value="07:00"/>
Review Time	<input type="text" value="15:00"/>
Healthcare Facility	<input type="text" value="Capital General"/>
Summary PGs	<input type="text" value="Medical"/>
Days To Project	<input type="text" value="6"/>
Min Axis Value Summary Chart	<input type="text" value="0"/>
Max Axis Value Summary Chart	<input type="text" value="50"/>

Report



07:15 Yesterday to 07:15 Today

	Projected	Actual	Variance
Emergency Patients In	10	11	1
Booked Patients In	0	0	0
Total Patients In	10	11	1
Total Patients Out	0	10	2

07:15 Today to 07:15 Tomorrow

	Actual Occupancy	Projected Patients In - Emergency	Projected Patients In - Booked	Projected Patients In - Combined	Projected Patients Out - Combined	Beds Open	Beds Free
Tuesday	42	13	0	13	12	51	9

Today's Projected Occupancy at 15:00 and projected Patient Activity from 07:15 to 15:00

	Projected Occupancy	Projected Patients In - Emergency	Projected Patients In - Booked	Projected Patients In - Combined	Projected Patients Out - Combined	Beds Open	Beds Free
Tuesday	40.3	4	0	4	0	51	11

Projected Activity for the Next 5 Days

	Projected Occupancy	Projected Patients In - Emergency	Projected Patients In - Booked	Projected Patients In - Combined	Projected Patients Out - Combined	Beds Open	Beds Free
Wed 07:15	43	14	0	14	14	51	8
Thu 07:15	45	15	0	15	15	51	6
Fri 07:15	45	12	0	12	15	51	6
Sat 07:15	42	9	0	9	7	51	9
Sun 07:15	44	7	0	7	6	51	7

DAILY REPORT WITH STAFFING

Provides key information for the daily operational meeting and assists with proactive planning for the next 2-4 days. This is just like the Daily Report, except it allows displaying a staffing line on the chart.

Configuration

Edit Report Parameters for Daily Report with Staffing

Custom Name

Start Time

Review Time

Healthcare Facility

Summary PGs

Days To Project

Roles

Required Ratio

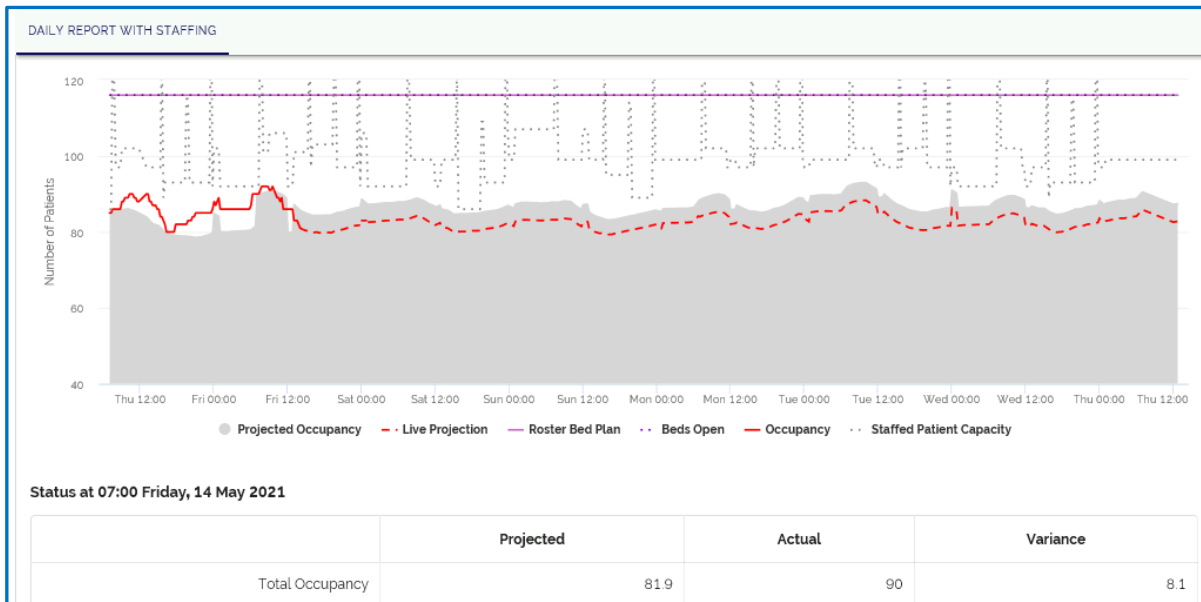
Ratio Type

Show Staff Based On

Min Axis Value Summary Chart

Max Axis Value Summary Chart

Report



EMERGENCY STATUS

This report shows the current status of patients in the Emergency Department (ED) and associated targets.

Configuration

While it can be included in Report Groups, it is generally viewed as a Dashboard report. Refer to the “Dashboards” section for details.

FORECAST STAFF REQUIRED*

Used to compare the staff required, calculated using ratios, against scheduled staff for long-range planning. It automatically defaults to the next full month but can be changed to reflect other date ranges. There are a few cautions with this report, since it is very large.

Configuration

- **Start Date/End Date:** Recommend not having date range exceed a total of 30-45 days to prevent timing out
- **Locations:** Best not to include too many locations (1-2 works best)
- **Table Roles:** Can include many roles to display in the table but recommend using RN or NURSE for the Chart role
- **Display Level:** Only choose “Summary” if selecting multiple locations and include just “Unit Detail” if wanting to display for a single unit

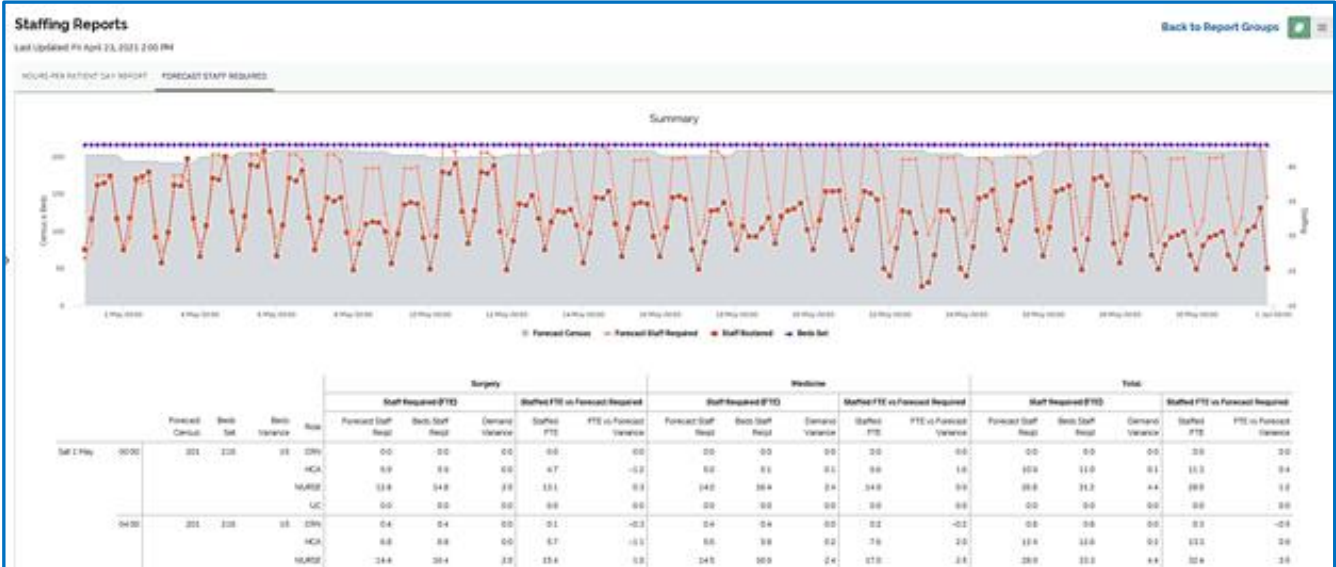
Edit Report Parameters for Forecast Staff Required

Start Date	<input type="text" value="2021-05-01"/>
End Date	<input type="text" value="2021-05-31"/>
Healthcare Facility	<input type="text" value="GH"/>
Locations	<input type="text" value="Medicine x Surgery x"/>
Start Time	<input type="text" value="00:00"/>
Shift Length	<input type="text" value="04:00"/>
Table Roles	<input type="text" value="CRN x HCA x NURSE x UC x"/>
Chart Role	<input type="text" value="NURSE"/>
Beds Planning Level	<input type="text" value="Roster"/>
Forecast Planning Level	<input type="text" value="Annual"/>
Show Staff Based On	<input type="text" value="Roster"/>
Display Level	<input type="text" value="Summary x Group Detail x Unit Detail x"/>
Display Beds Set	<input type="text" value="Yes"/>
Display Chart	<input type="text" value="Yes"/>
Display Table	<input type="text" value="Yes"/>

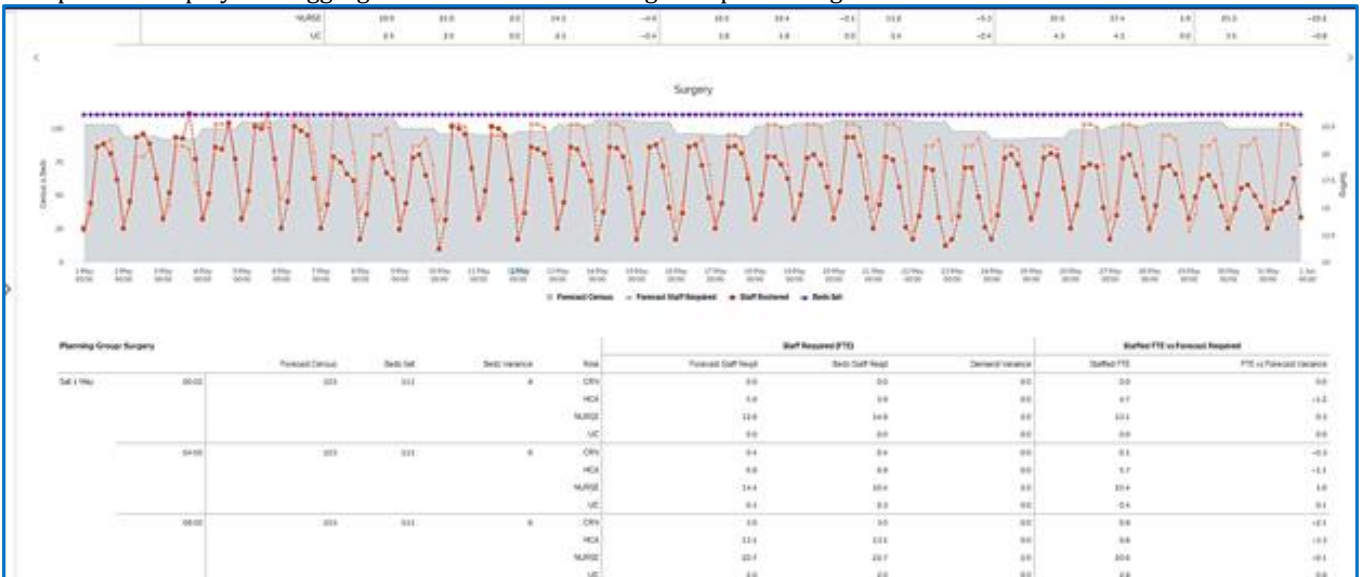
Report

Below are examples of all three display levels (Summary, Group Detail and Unit Detail) in the order they would display when all three are selected.

Summary Level allows viewing multiple groups and a total



Group Detail displays the aggregated view of the Planning Group’s staffing.



Unit Detail shows individual unit-level staffing data.



HISTORIC ALOS DISCHARGE CHART*

A view of the number of discharges and corresponding ALOS of those discharges over time. This can be used for monitoring if ALOS is changing over a period of time, which may feed into the planning process.

Configuration

This can be configured using Planning Groups or Services/Units. Both options are displayed below.

Edit Report Parameters for Historic ALOS Discharge Chart

Custom Name: Historic ALOS Discharge Chart

Start Date: 2021-01-18

End Date: 2021-04-12

Healthcare Facility: GH ✕

Filter By: Planning Groups

Planning Groups: Medicine ✕

Units: Not Applicable ✕

Services: Not Applicable ✕

Monthly Or Weekly: Weekly

ALOS In Hours or Days: Days

Show Actuals: This Year's ✕

Show Table: Yes

Edit Report Parameters for Historic ALOS Discharge Chart

Custom Name: Historic ALOS Discharge Chart

Start Date: 2021-01-18

End Date: 2021-04-12

Healthcare Facility: GH ✕

Filter By: Units/Services

Planning Groups: Not Applicable ✕

Units: 4NMED ✕ 4SMED ✕ 4WMED ✕

Services: Medicine ✕ Oncology ✕ Surgery ✕

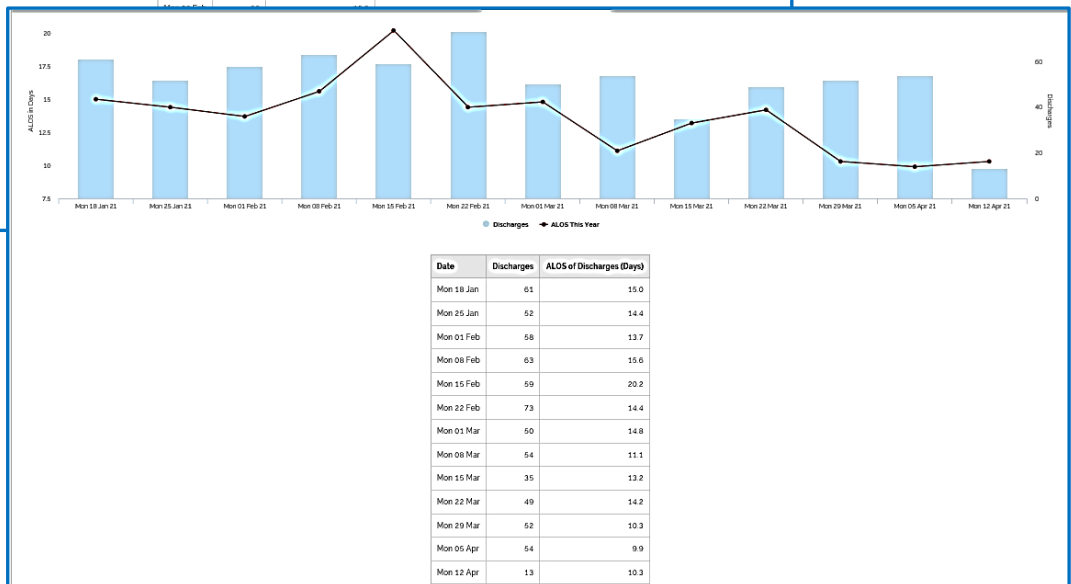
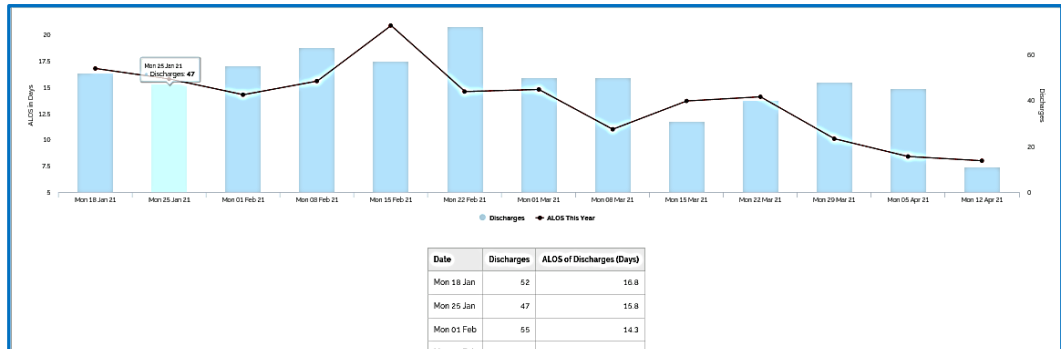
Monthly Or Weekly: Weekly

ALOS In Hours or Days: Days

Show Actuals: This Year's ✕

Show Table: Yes

Report



HOSPITAL STATUS

Displays the current status on a bed-by-bed basis. This report shows current occupancy by unit and planning group as a stacked column bar graph. To view this information in more detail as a table, see the Census Matrix.

Note, While this report can be added to a Report Group, it is generally recommended to display it as a Dashboard report instead. Refer to the “Dashboard” section for details.

HOURS PER PATIENT DAY REPORT*

Shows a view of occupancy and budget vs actual and rostered hours per patient day. Provides an at a glance view of HPPD with details available for any particular day.

Configuration

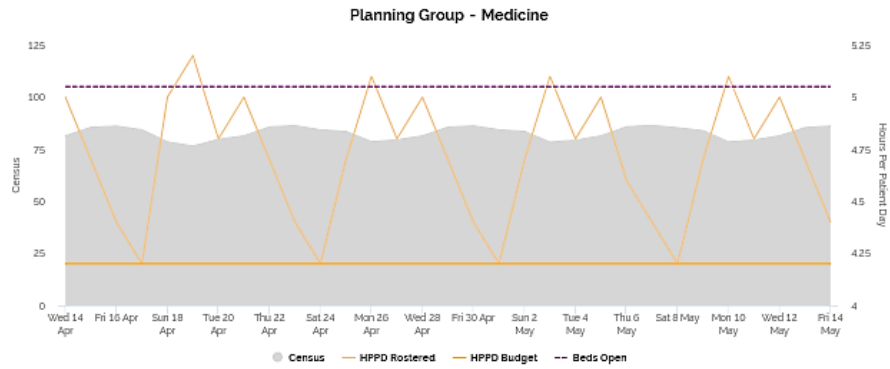
- **Start Date/End Date:** It will default to display the last 12 weeks. If changing it from this default, keep the date range small (e.g. 30-45 days)
- **Locations:** Only choose 1-2 groups or individual units
- **Roles:** If selecting more than one, they will be aggregated in the chart.

Edit Report Parameters for Hours Per Patient Day Report 1

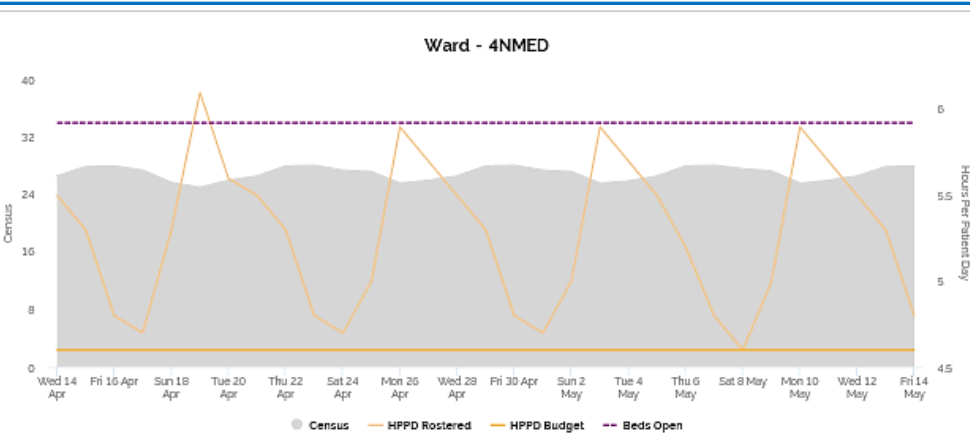
Custom Name	<input type="text" value="Hours Per Patient Day Report 1"/>
Start Date	<input type="text" value="2021-02-16"/>
EndDate	<input type="text" value="2021-05-13"/>
Healthcare Facility	<input type="text" value="GH"/>
Locations	<input type="text" value="Medicine x"/>
Roles	<input type="text" value="NURSE x"/>
Show Staff Based On	<input type="text" value="Rostered"/>
Census & Beds Open Calculation	<input type="text" value="Daily Average"/>
Display Max Capacity	<input type="text" value="No"/>
Display Beds Open	<input type="text" value="Yes"/>
Display PG Grand Total Summary	<input type="text" value="No"/>
Display PG Summary	<input type="text" value="Yes"/>
Display Unit Detail	<input type="text" value="Yes"/>
Display Table	<input type="text" value="Yes"/>

Report

Start Date Wed 04/14/2021
 End Date Fri 05/14/2021
 Planning Groups Medicine
 Roles RN



Date	Census	Max Capacity	Beds Open	Role	HPPD Rostered	HPPD Budget
Wed 14 Apr	81	111	105	NURSE	5.0	4.2
Thu 15 Apr	86	111	105	NURSE	4.7	4.2
Fri 16 Apr	86	111	105	NURSE	4.4	4.2
Sat 17 Apr	84	111	105	NURSE	4.2	4.2
Sun 18 Apr	79	111	105	NURSE	5.0	4.2
Mon 19 Apr	77	111	105	NURSE	5.2	4.2
Tue 20 Apr	80	111	105	NURSE	4.8	4.2
Wed 21 Apr	81	111	105	NURSE	5.0	4.2
Thu 22 Apr	86	111	105	NURSE	4.7	4.2



Date	Census	Max Capacity	Beds Open	Role	HPPD Rostered	HPPD Budget
Wed 14 Apr	27	36	34	NURSE	5.5	4.6
Thu 15 Apr	28	36	34	NURSE	5.3	4.6
Fri 16 Apr	28	36	34	NURSE	4.8	4.6
Sat 17 Apr	27	36	34	NURSE	4.7	4.6
Sun 18 Apr	26	36	34	NURSE	5.3	4.6
Mon 19 Apr	25	36	34	NURSE	6.1	4.6
Tue 20 Apr	26	36	34	NURSE	5.6	4.6
Wed 21 Apr	27	36	34	NURSE	5.5	4.6
Thu 22 Apr	28	36	34	NURSE	5.3	4.6
Fri 23 Apr	28	36	34	NURSE	4.8	4.6
Sat 24 Apr	27	36	34	NURSE	4.7	4.6
Sun 25 Apr	27	36	34	NURSE	5.0	4.6
Mon 26 Apr	26	36	34	NURSE	5.9	4.6
Tue 27 Apr	26	36	34	NURSE	5.7	4.6
Wed 28 Apr	27	36	34	NURSE	5.5	4.6

PATIENT MOVEMENTS IN*

Patients Ins at a Planning Group or unit level compared with actuals for Yesterday, Today, and Tomorrow.

This report shows actual and projected movement of patients, i.e., the numbers admitted, or transferred into a planning group.

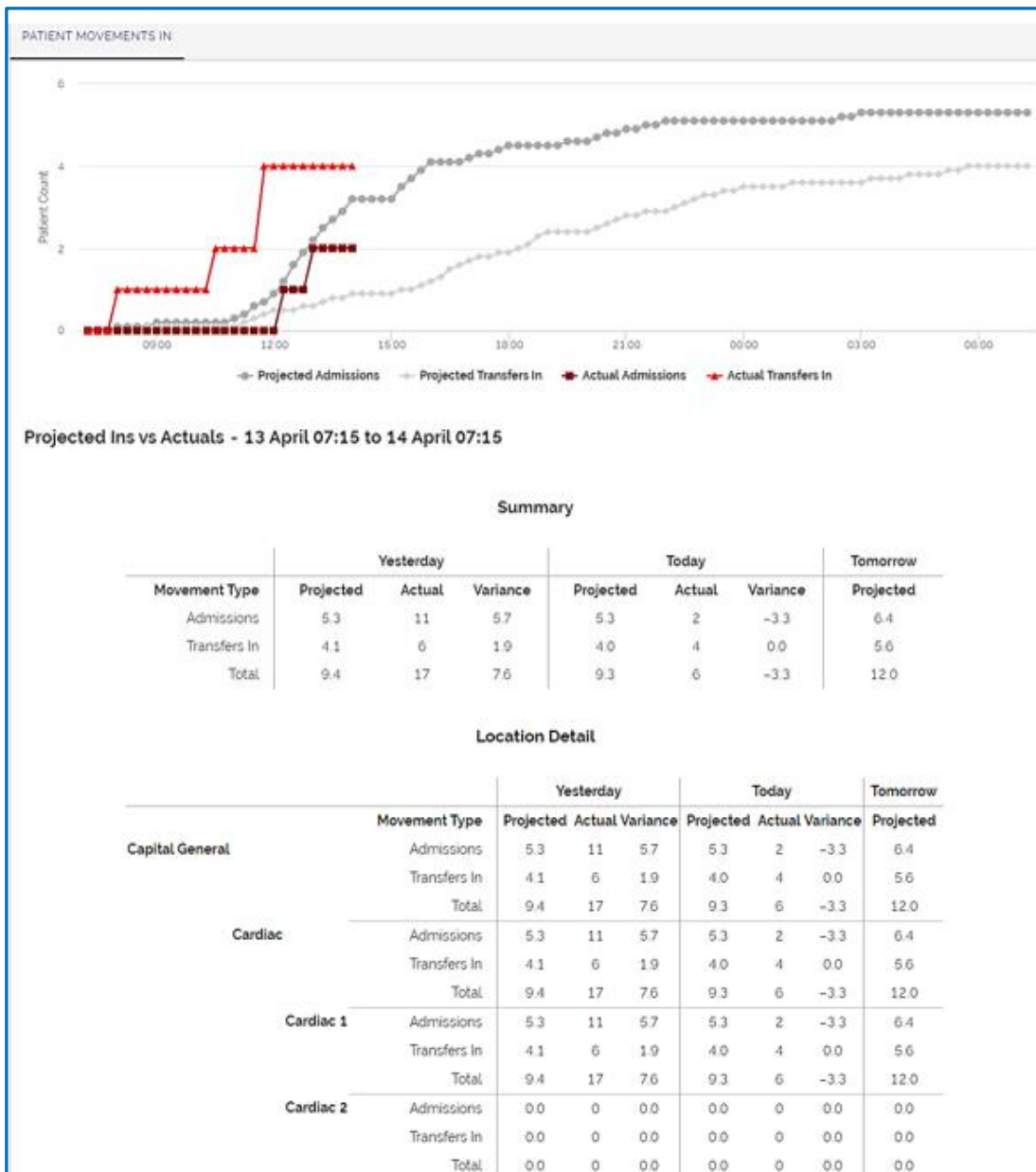
Increase understanding of patient movements by separating the Admissions from the Transfers In

Configuration

Edit Report Parameters for Patient Movements In

Custom Name	<input type="text" value="Patient Movements In"/>
Locations	<input type="button" value="Cardiac x"/>
Show Chart	<input type="text" value="Yes"/>
Show Detail	<input type="text" value="Yes"/>

Report



PATIENT MOVEMENTS OUT*

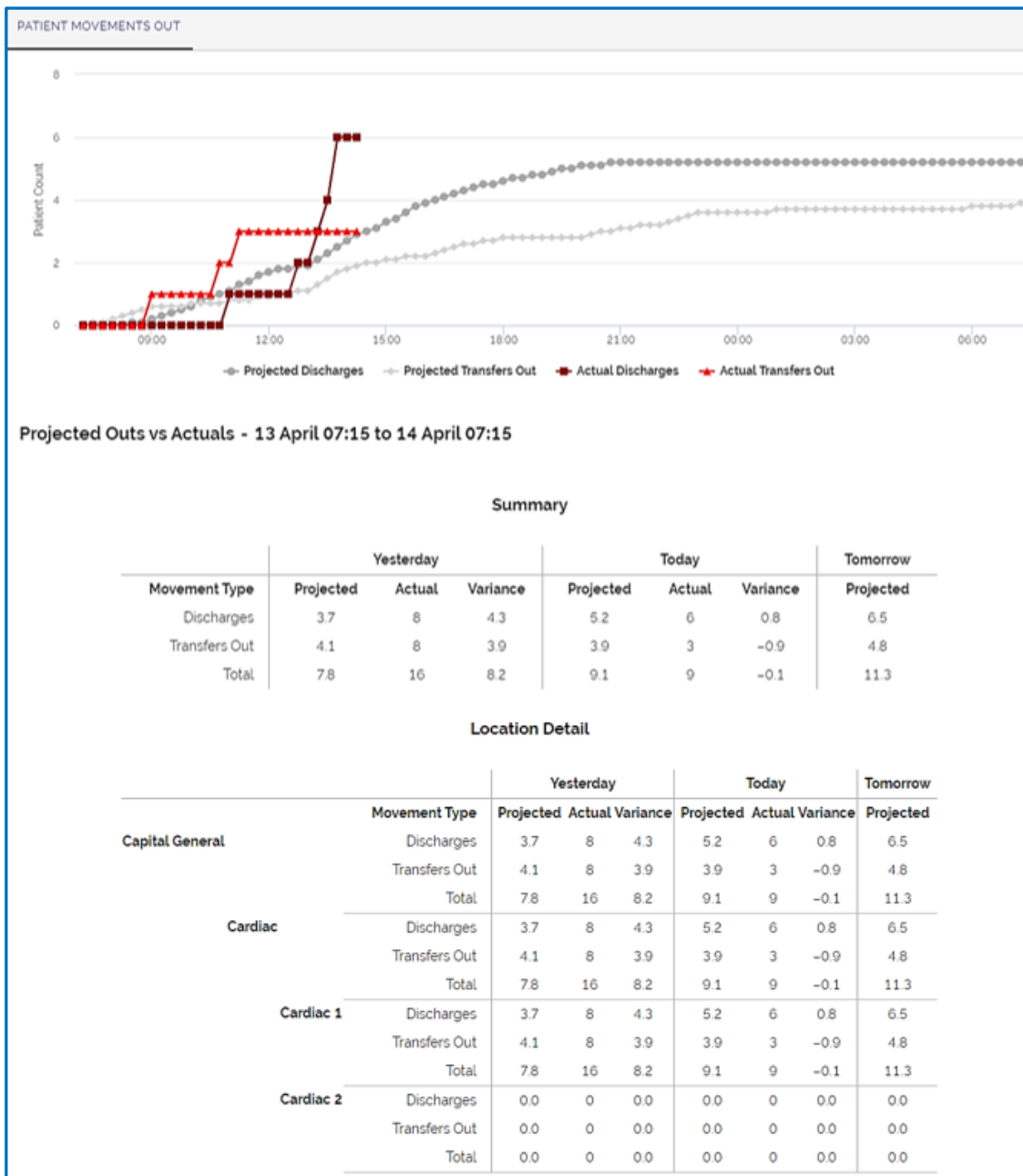
Patients Out of a Planning Group or unit compared with actuals for Yesterday, Today, and Tomorrow.

Configuration

Edit Report Parameters for Patient Movements Out

Custom Name	Patient Movements Out
Locations	Cardiac x
Show Chart	Yes
Show Detail	Yes

Report



PROJECTED PATIENTS IN AND DISCHARGES*

This report allows users to have a view of expected activity over the next 7 days and will help to gauge if there will be sufficient capacity to accommodate the anticipated patients in each area. It also includes the movements from the last 7 days to help identify trends or issues by displaying the cumulative variances. It can also include Emergency locations.

Configuration

Edit Report Parameters for Projected Patients In and Discharges

Custom Name

Inpatient Planning Groups

Acute Planning Groups

Start Date

Start Time

Days Back

Days Forward

Decimal Places for Projection

Negative Variance Colour

Non-Negative Variance Colour

Report

Last Updated: Tue April 13, 2021 2:00 PM

PROJECTED PATIENTS IN AND DISCHARGES

Projected Patients In and Discharges - Next 7 Days

	Apr-13-2021		Apr-14-2021		Apr-15-2021		Apr-16-2021		Apr-17-2021	
	Patients In	Discharges	Patients In	Discharges	Patients In	Discharges	Patients In	Discharges	Patients In	Discharges
Cardiac	9.3	5.2	11.9	6.5	10.2	5.4	9.9	7.8	6.8	6.3
Cardiac 1	9.3	5.2	11.9	6.5	10.2	5.4	9.9	7.8	6.8	6.3
Cardiac 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Inpatient	9.3	5.2	11.9	6.5	10.2	5.4	9.9	7.8	6.8	6.3

Projected Patients In and Discharges - Last 7 Days

	Apr-06-2021				Apr-07-2021				Apr-08-2021				Apr-09-2021				Patie
	Patients In		Discharges		Patients In		Discharges		Patients In		Discharges		Patients In		Discharges		
	Proj.	Act.	Proj.	Act.	Proj.	Act.	Proj.	Act.	Proj.	Act.	Proj.	Act.	Proj.	Act.			
Cardiac	8.5	11	4.7	5	10.6	19	5.6	9	9.1	13	4.5	9	8.2	20	6.2	18	5.8
Cardiac 1	8.5	11	4.7	5	10.6	19	5.6	9	9.1	13	4.5	9	8.2	20	6.2	18	5.8
Cardiac 2	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Daily Variance	2.5		0.3		8.4		3.4		3.9		4.5		11.8		11.8		6
Cumulative Variance	2.5		0.3		10.9		3.6		14.8		8.1		26.6		19.9		3;
Total Inpatient	8.5	11	4.7	5	10.6	19	5.6	9	9.1	13	4.5	9	8.2	20	6.2	18	5.8
Daily Variance	2.5		0.3		8.4		3.4		3.9		4.5		11.8		11.8		6
Cumulative Variance	2.5		0.3		10.9		3.6		14.8		8.1		26.6		19.9		3;

PROJECTED VS ACTUAL DISCHARGES

This report displays a bar graph showing the difference between projected and actual discharges over the previous seven days and projected discharges over the next six days.

Configuration

Edit Report Parameters for Projected vs Actual Discharges

Custom Name

Healthcare Facility

Locations

Start Date

Start Time

Days Back

Days Forward

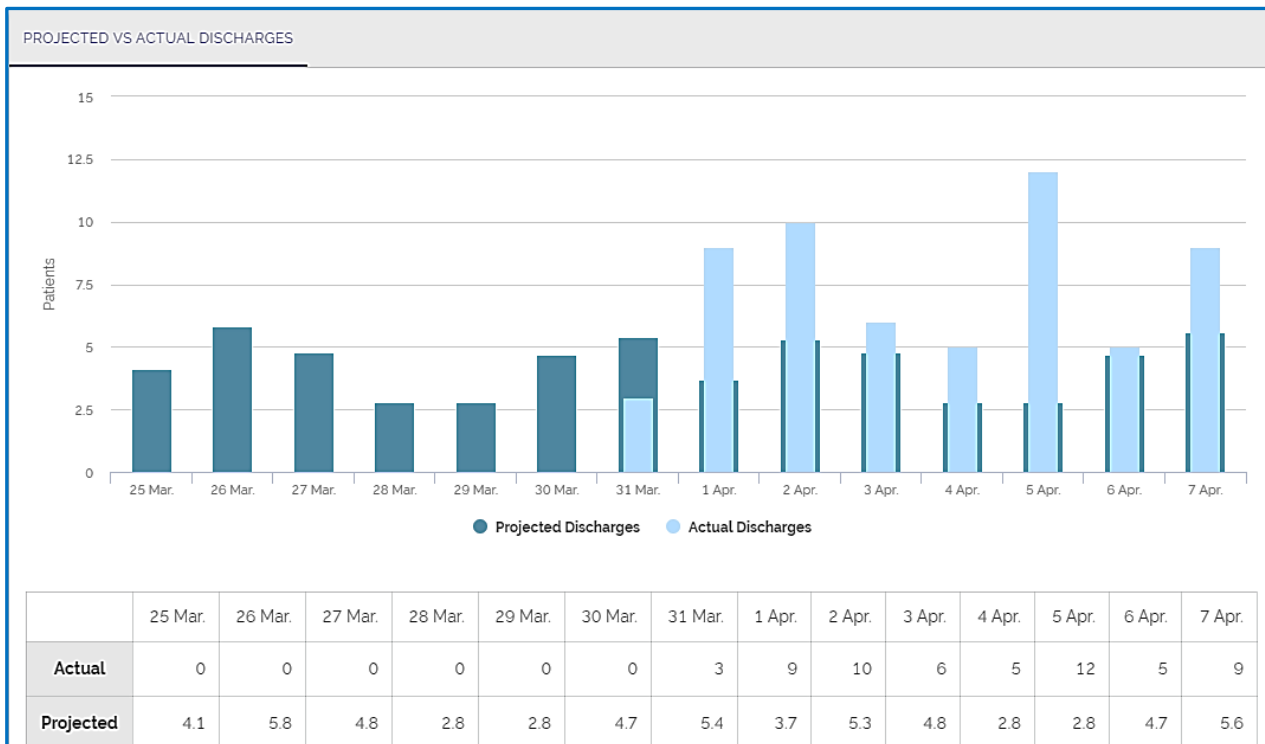
Display Table

Decimal Places for Projection

Projected Colour

Actual Colour

Report



PROJECTED VS ACTUAL PATIENTS IN

This report displays a bar graph showing the difference between actual and projected patients in (combination of admissions and transfers in) over the previous seven days and projected patients in over the next six days.

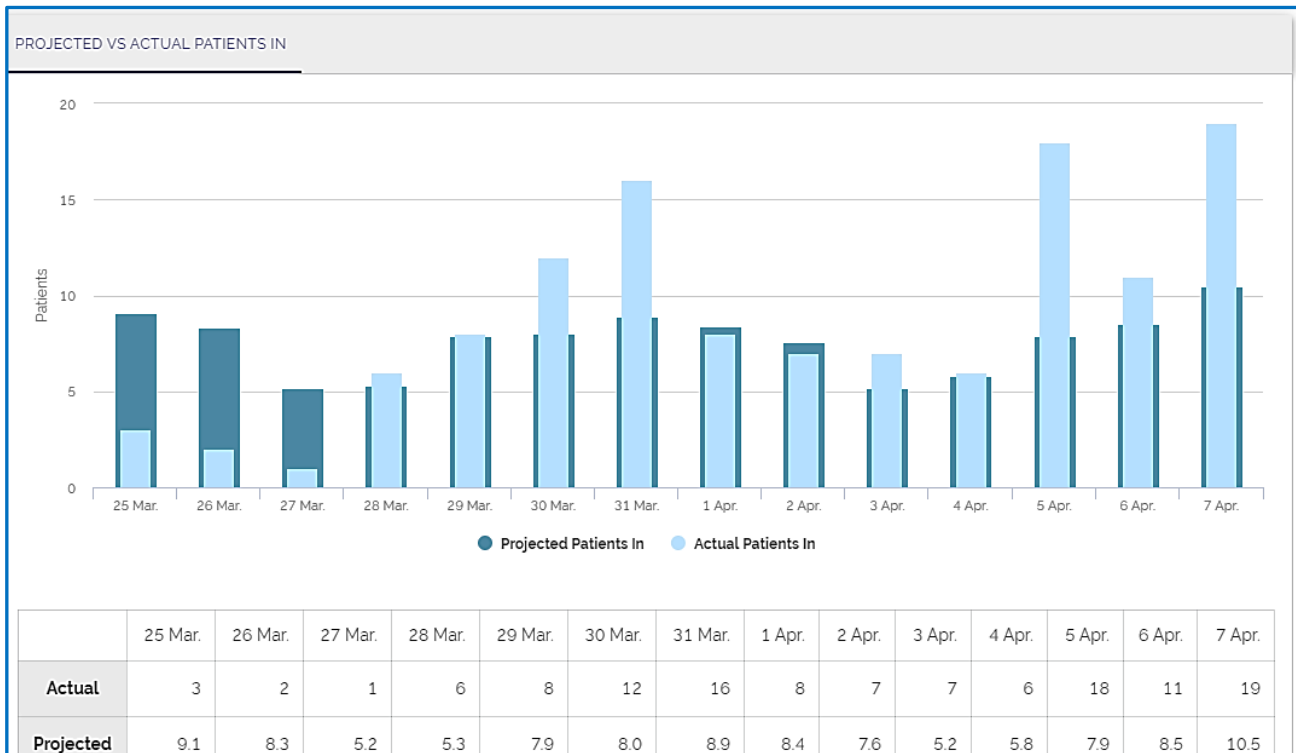
Configuration

Edit Report Parameters for Projected vs Actual Patients In

Custom Name	Projected vs Actual Patients In
Healthcare Facility	Capital General
Locations	Cardiac
Start Date	2021-04-01
Start Time	07:00
Days Back	7
Days Forward	6
Display Table	Yes
Decimal Places for Projection	1
Projected Colour	dark sky blue
Actual Colour	light sky blue

Save
Cancel

Report



PROJECTION VS ACTUAL CHART - SPECIALTY VIEW

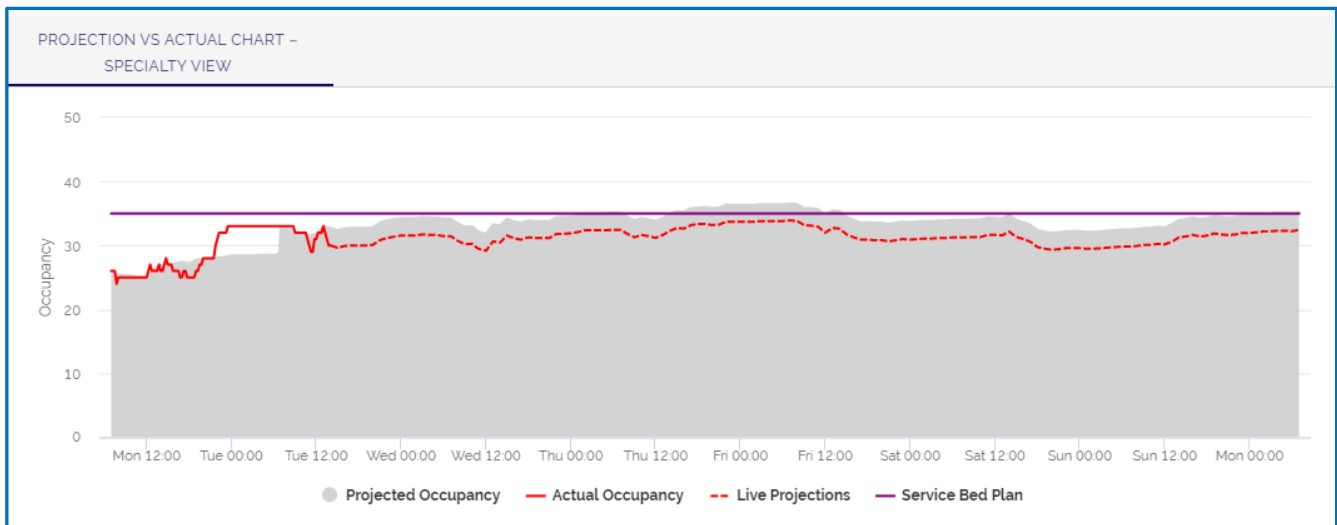
Provides real-time updates to show actual occupancy vs projected occupancy from a service type perspective, and guides decisions on the resource plan.

Configuration

Edit Report Parameters for Projection vs Actual Chart – Specialty View

Custom Name	<input type="text" value="Projection vs Actual Chart – Specialty View"/>
Start Date	<input type="text" value="2021-04-13"/>
Start Time	<input type="text" value="07:00"/>
Healthcare Facility	<input type="text" value="Capital General"/>
Planning Groups	<input type="text" value="Cardiac"/>
Days To Project	<input type="text" value="6"/>
Minimum Axis Value	<input type="text" value="0"/>
Maximum Axis Value	<input type="text" value="50"/>

Report



PROJECTION VS ACTUAL CHART - WARD VIEW

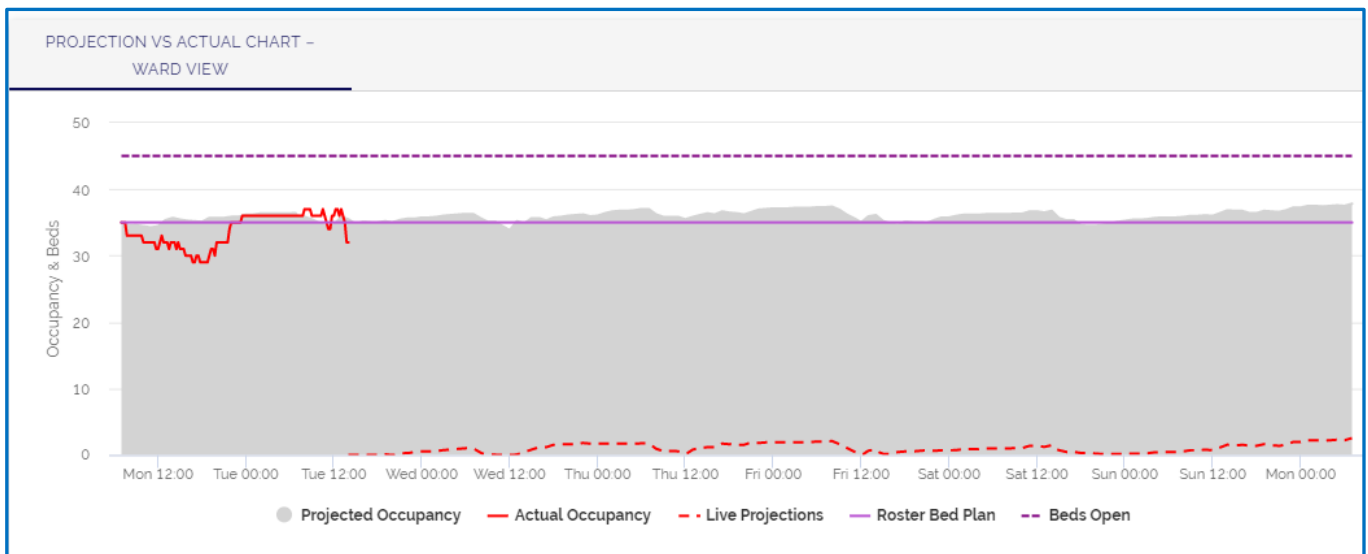
Provides real-time updates to show actual occupancy vs projected occupancy from a unit perspective, guides decisions on the resource planning.

Configuration

Edit Report Parameters for Projection vs Actual Chart – Ward View

Custom Name	<input type="text" value="Projection vs Actual Chart – Ward View"/>
Start Date	<input type="text" value="2021-04-13"/>
Start Time	<input type="text" value="07:00"/>
Healthcare Facility	<input type="text" value="Capital General"/>
Planning Groups	<input type="text" value="Cardiac"/>
Days To Project	<input type="text" value="6"/>
Minimum Axis Value	<input type="text" value="0"/>
Maximum Axis Value	<input type="text" value="50"/>

Report



PROJECTION VS ACTUAL CHART - WARD VIEW WITH STAFFING

Provides real-time updates to show actual occupancy vs projected occupancy from a unit perspective, guides decisions on the resource plan.

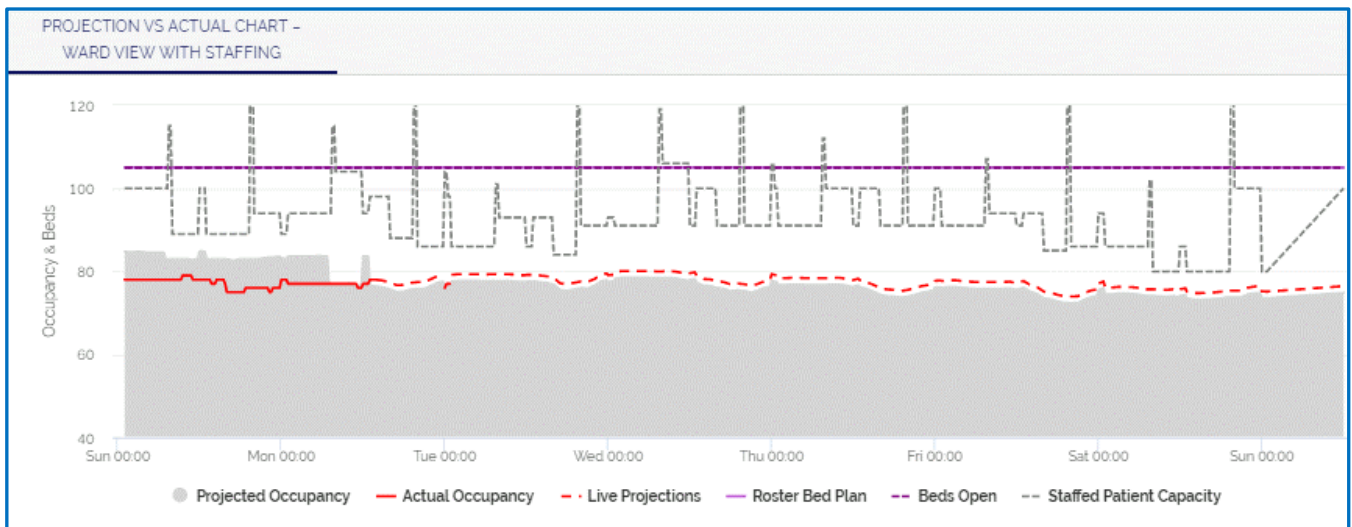
Note: This same view is already part of the PG Today Dashboards as part of the standard dashboard configuration, but the staffing line displays differently in this format.

Configuration

Edit Report Parameters for Projection vs Actual Chart – Ward View with Staffing

Custom Name	<input type="text" value="Projection vs Actual Chart - Ward View with Staffing"/>
Start Date	<input type="text" value="2021-05-14"/>
Start Time	<input type="text" value="00:00"/>
Healthcare Facility	<input type="text" value="GH ✕"/>
Planning Groups	<input type="text" value="Medicine ✕"/>
Days To Project	<input type="text" value="6"/>
Roles	<input type="text" value="NURSE ✕"/>
Required Ratio	<input type="text" value="PAR"/>
Ratio Type	<input type="text" value="Projected Census"/>
Show Staff Based On	<input type="text" value="Rostered"/>
Minimum Axis Value	<input type="text" value="50"/>
Maximum Axis Value	<input type="text" value="150"/>

Report



REGIONAL REPORT*

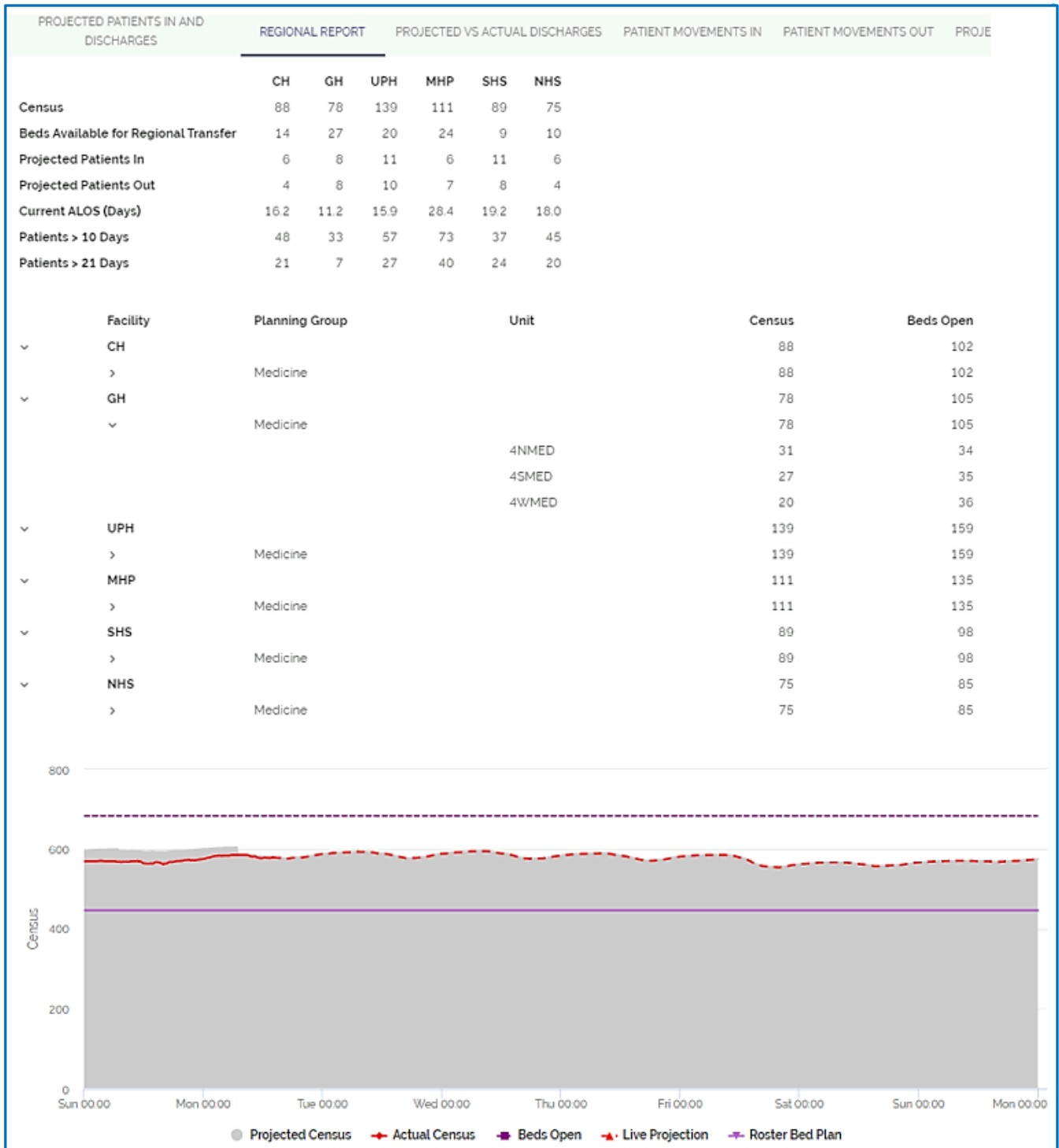
The regional report provides a real-time view of key of planning group metrics across two or more facilities. This enables users to understand demand and capacity issues across a region and aid in the management of any bottlenecks.

Configuration

Edit Report Parameters for Regional Report

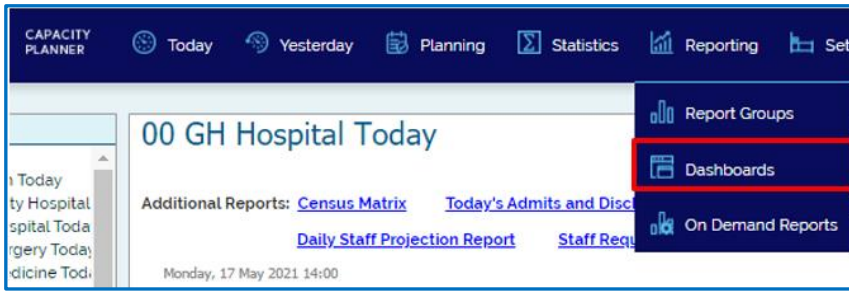
Custom Name	<input type="text" value="Regional Report"/>
Locations	<input type="button" value="Medical x"/> <input type="button" value="Surgical x"/> <input type="button" value="Capital Mental Health x"/> <input type="button" value="Coastal x"/> ▼
Start Time	<input type="text" value="07:00"/> ▼
Metrics	<input type="button" value="Occupancy x"/> ▼
Days To Project	<input type="text" value="7"/> ▼
Display Live Projections	<input type="text" value="Yes"/> ▼
Display Beds Open	<input type="text" value="Yes"/> ▼
Display Roster Bed Plan	<input type="text" value="Yes"/> ▼
Display Metric Table	<input type="text" value="Yes"/> ▼
Display Bar Chart	<input type="text" value="Yes"/> ▼
Display Occupancy Table	<input type="text" value="Yes"/> ▼
Roles	<input type="text" value="Not Applicable"/> ▼
Staff On	<input type="text" value="Rostered"/> ▼

Report



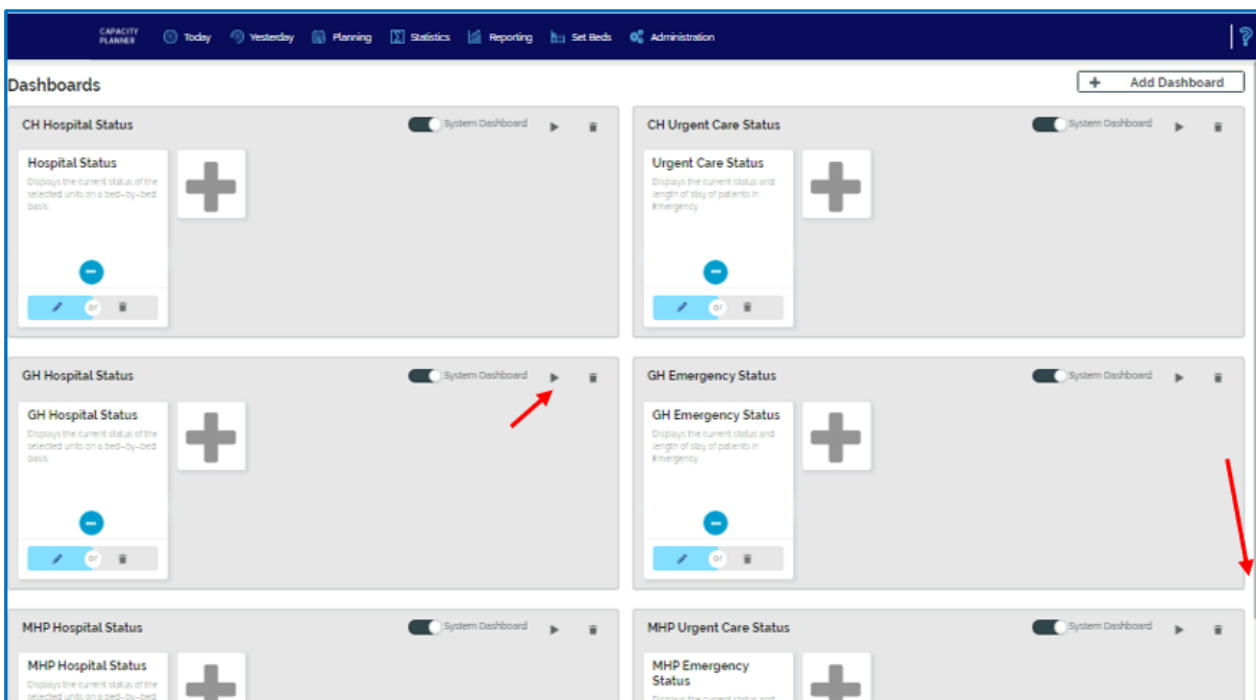
DASHBOARDS

Dashboard reports provide day-to-day information for your hospital or facility.

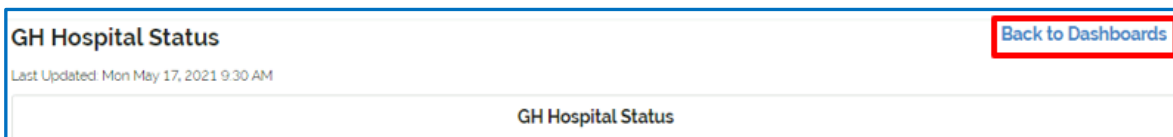


DASHBOARD NAVIGATION

When first selecting **Dashboards** from the Reporting dropdown, there may be several displayed. Locate the one to be viewed by using the vertical scroll bar on the right and click the arrow to view the dashboard.



To return to the list and choose a different Dashboard, click the **Back to Dashboards** link on the right.



INDIVIDUAL DASHBOARDS

The following dashboard reports are available for configuration and use . Those with an asterisk (*) are most commonly used.

EMERGENCY STATUS*

Displays the current status and length of stay of patients in Acute.

Configuration

Edit Report Parameters for UPH Emergency Status

Custom Name

Healthcare Facility

Units

Adult ED IP ✕
Adult Emergency ✕
Child ED IP ✕

Child Emergency ✕
L&D Triage ✕

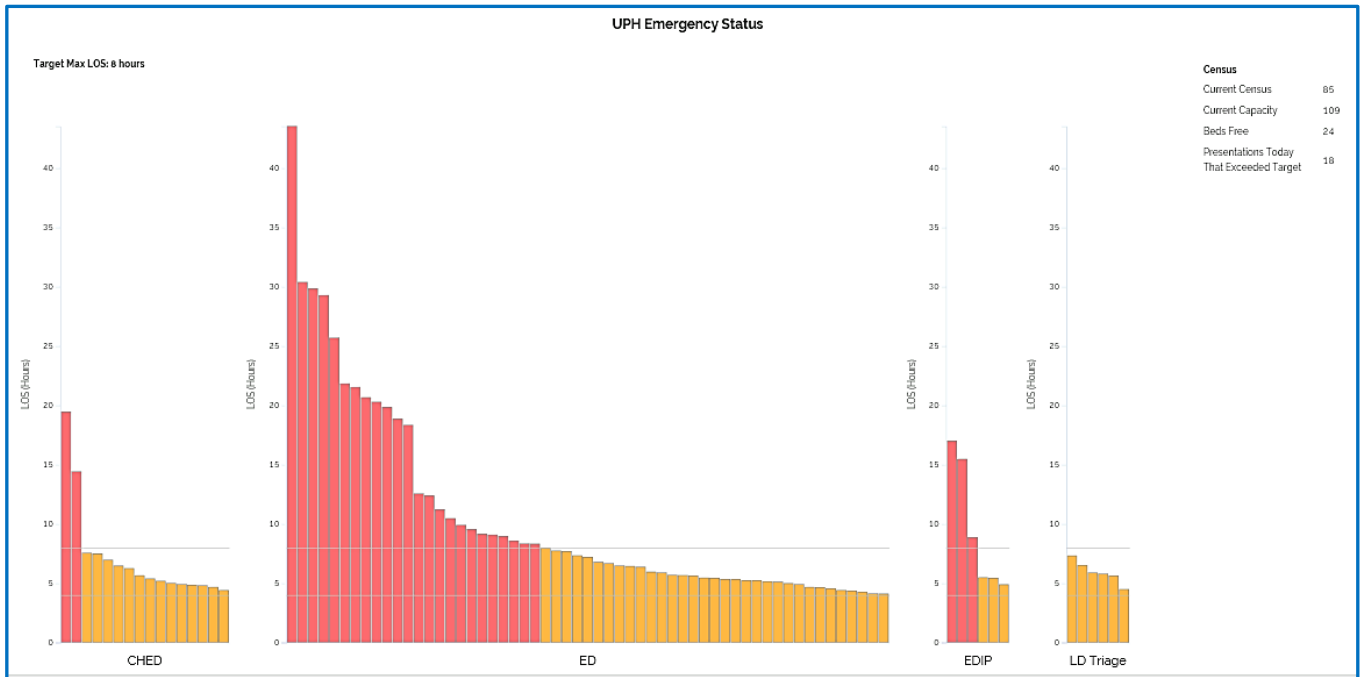
Calculate On

Red Threshold

Amber Threshold

Display Triage Types

Dashboard



HOSPITAL STATUS*

Displays the current status of the selected units on a bed-by-bed basis. It enables users to quickly see any off-service patients by using the color of the PGs' attached Service Types and those of the patients in each bed. The blocks in each column represent a bed in that unit.

Configuration

This report can include all active Locations (including Emergency) or be defined to show a more regional view (e.g. for all Critical Care or Emergency beds across a region).

Edit Report Parameters for Hospital Status

Custom Name:

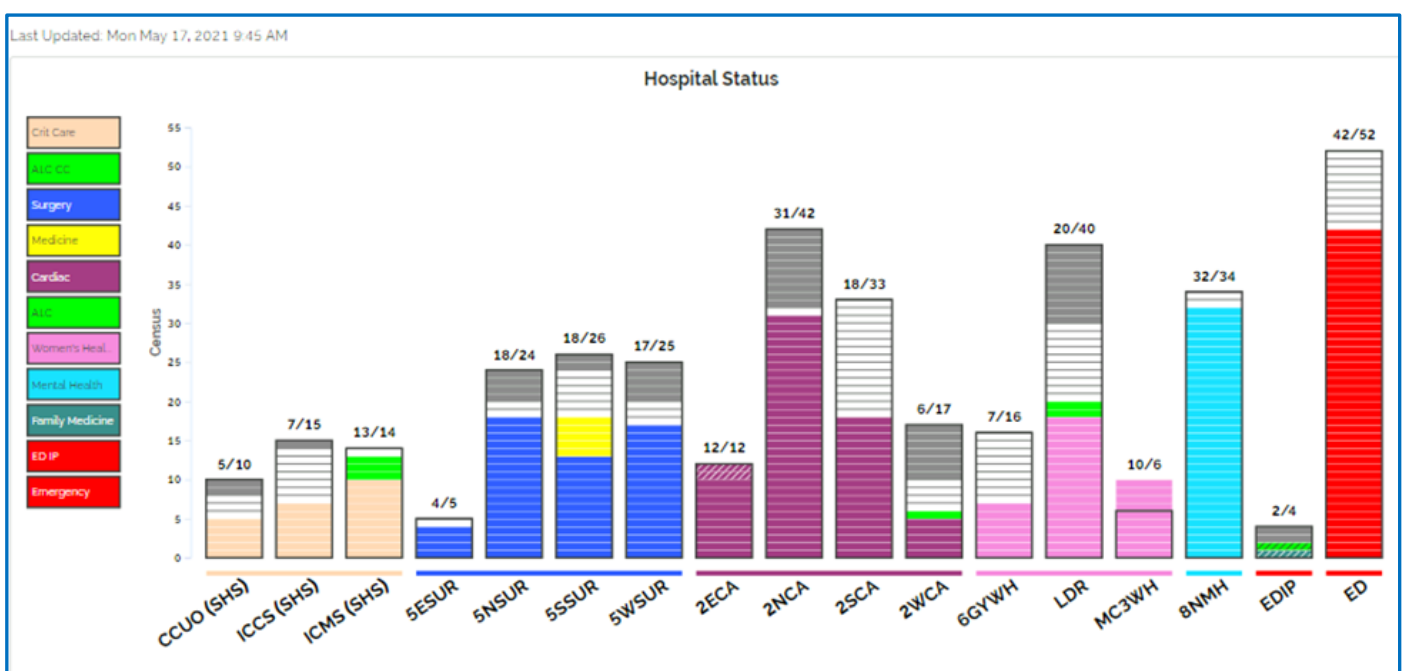
Healthcare Facilities:

Locations:

Dashboard

The first number at the top of the column is the number of patients and the second is the number of physical beds in that unit. MC3WH shows the census exceeds the physical beds. This is usually an indication that patients in the unit have yet to be discharged in the registration system.

- The white boxes are empty beds ready to take patients.
- The dark gray boxes are the closed beds.
- The other colors reflect the patients' services, and to which group they are associated. This allows spotting any off-service patients more easily.
- The colored boxes with diagonal lines represent patients in closed beds.



PATIENT MOVEMENTS IN AND PATIENT MOVEMENTS OUT

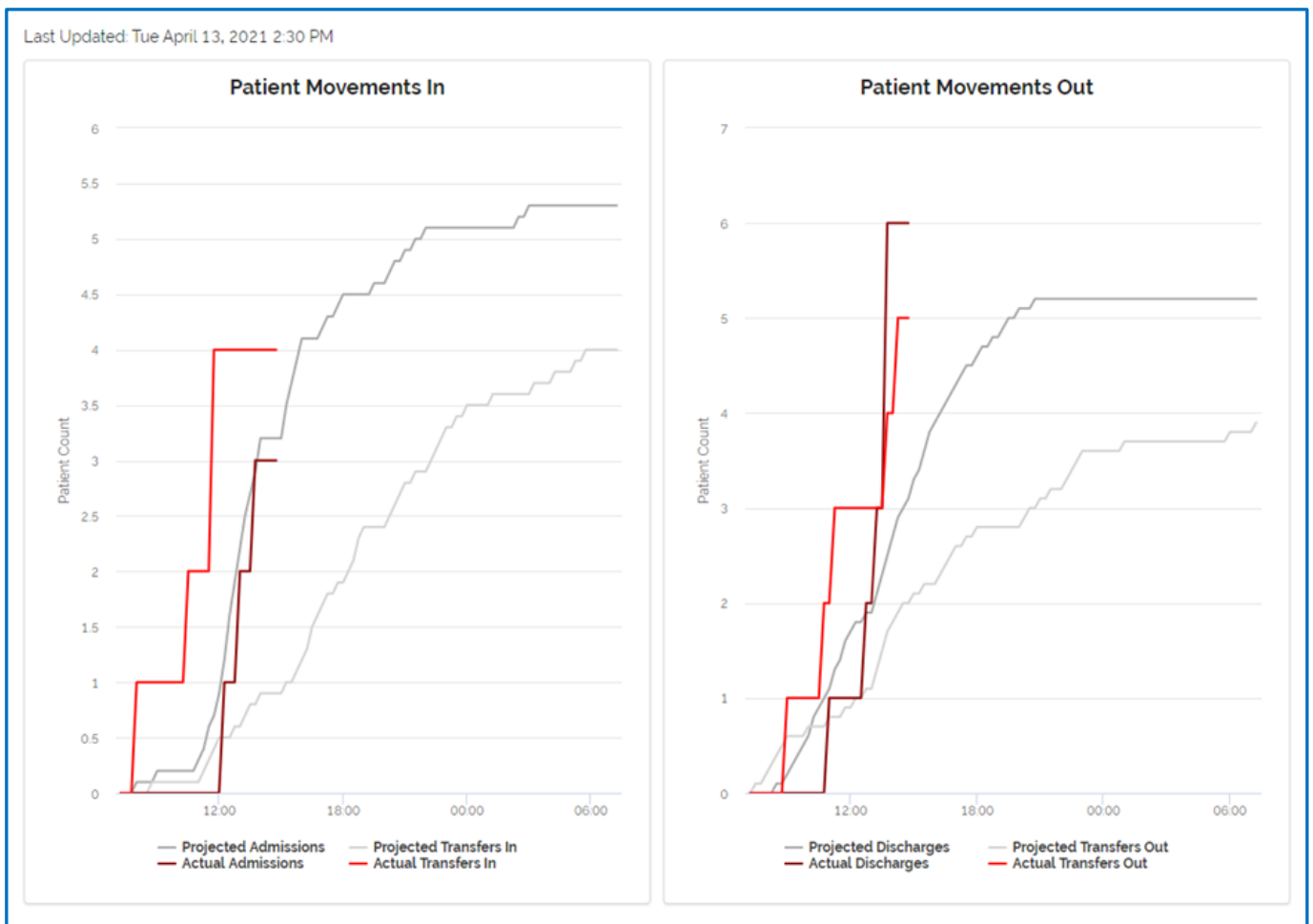
These reports can be run at either a Planning Group or unit level. They each display actuals for Yesterday, and projections for Today, and Tomorrow. Admissions and Discharges are distinct from Transfers. The difference between this report run in Report Groups vs Dashboards is that it will only display the chart and not show the detail. In Dashboards, you can also display these side-by-side.

Configuration

Edit Report Parameters for Patient Movements Out

Custom Name	<input type="text" value="Patient Movements Out"/>
Locations	<input type="text" value="Medicine (GH) ✕"/>
Show Chart	<input type="text" value="Yes"/>
Show Detail	<input type="text" value="No"/>

Dashboard



PROJECTION VS ACTUAL CHART - SPECIALTY VIEW

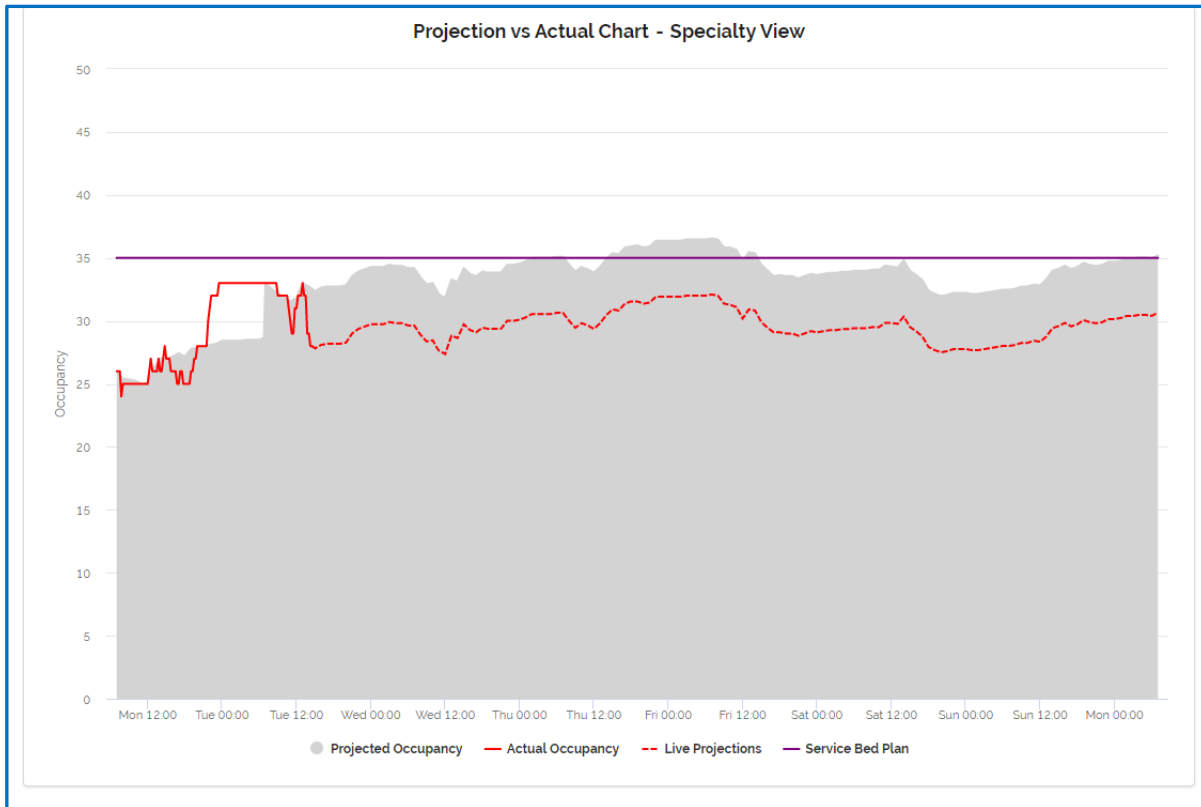
Provides real-time updates to show actual occupancy vs projected occupancy from a service type perspective, and guides decisions on the resource plan.

Configuration

Edit Report Parameters for Projection vs Actual Chart – Specialty View

Custom Name	<input type="text" value="Projection vs Actual Chart – Specialty View"/>
Start Date	<input type="text" value="2021-04-13"/>
Start Time	<input type="text" value="07:00"/>
Healthcare Facility	<input type="text" value="Capital General"/>
Planning Groups	<input type="text" value="Cardiac"/>
Days To Project	<input type="text" value="6"/>
Minimum Axis Value	<input type="text" value="0"/>
Maximum Axis Value	<input type="text" value="50"/>

Dashboard



PROJECTION VS ACTUAL CHART - WARD VIEW

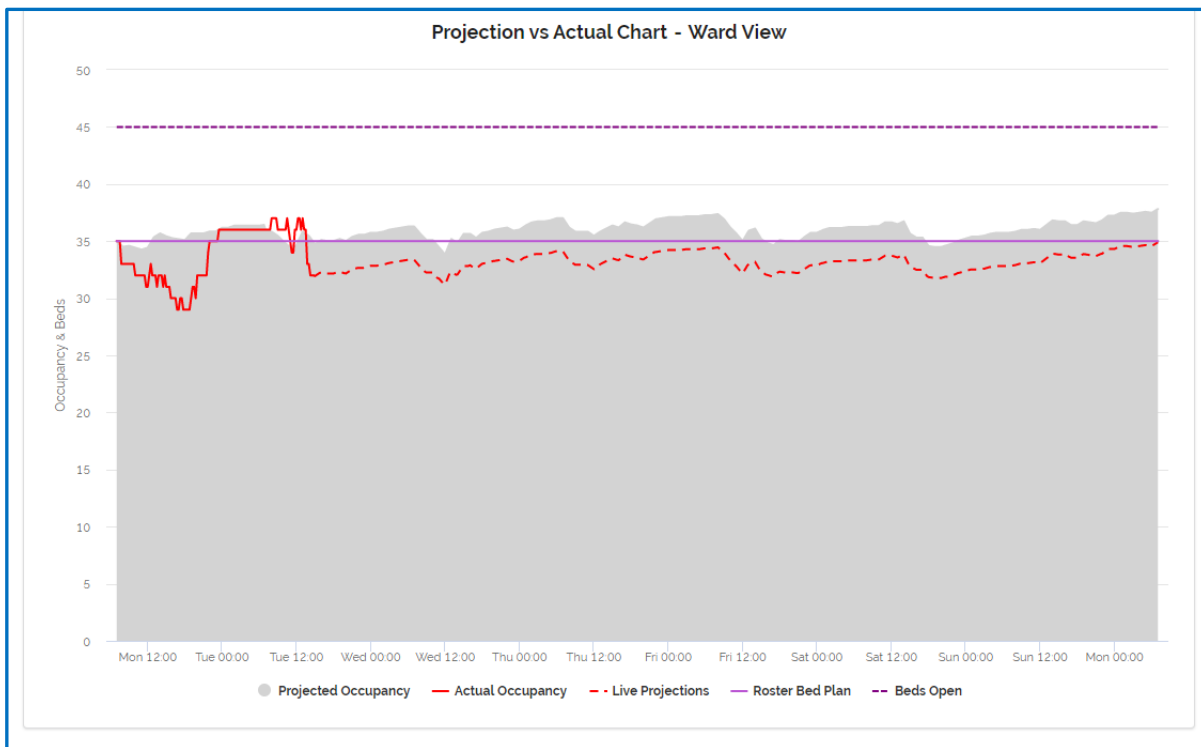
Provides real-time updates to show actual occupancy vs projected occupancy from a location perspective, guides decisions on the resource plan.

Configuration

Edit Report Parameters for Projection vs Actual Chart – Ward View

Custom Name	<input type="text" value="Projection vs Actual Chart – Ward View"/>
Start Date	<input type="text" value="2021-04-13"/>
Start Time	<input type="text" value="07:00"/>
Healthcare Facility	<input type="text" value="Capital General"/>
Planning Groups	<input type="text" value="Cardiac"/>
Days To Project	<input type="text" value="6"/>
Minimum Axis Value	<input type="text" value="0"/>
Maximum Axis Value	<input type="text" value="50"/>

Dashboard



PROJECTION VS ACTUAL CHART - WARD VIEW WITH STAFFING

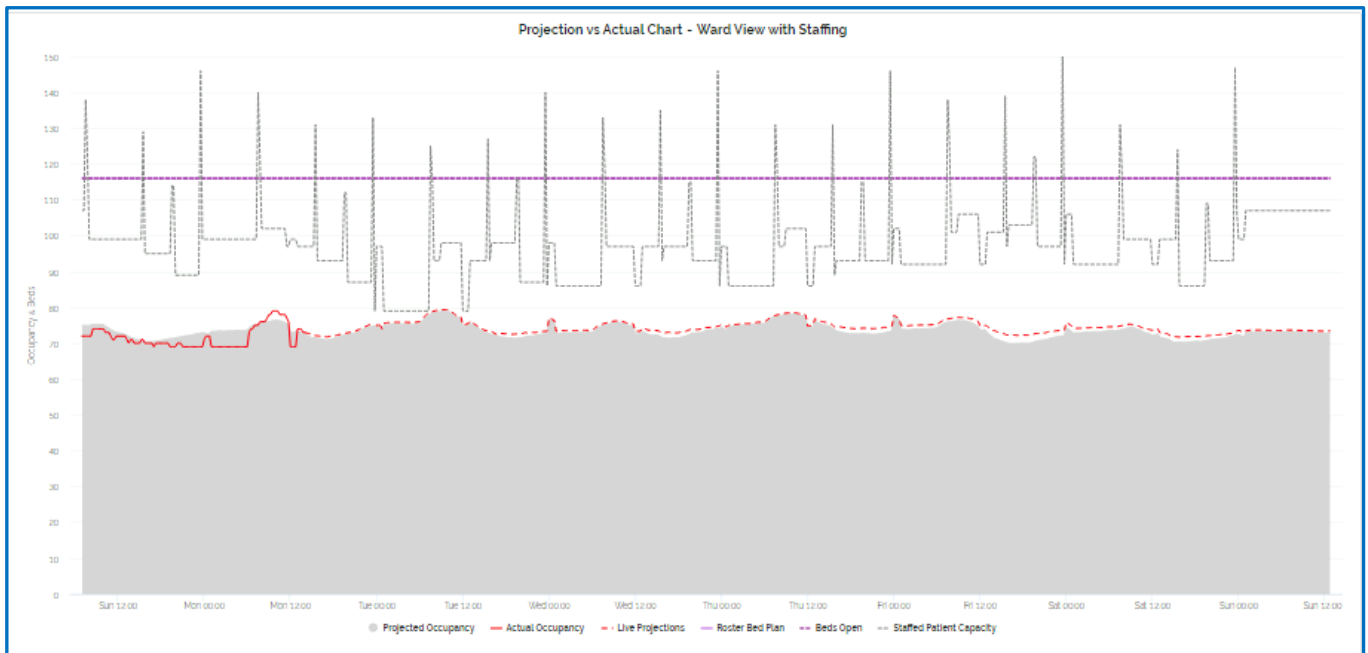
Provides real-time updates to show actual occupancy vs projected occupancy from a unit perspective, guides decisions on the resource plan.

Configuration

Edit Report Parameters for Projection vs Actual Chart – Ward View with Staffing

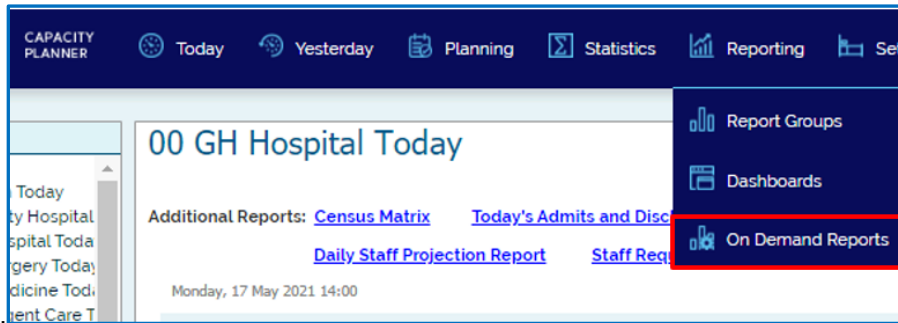
Custom Name	<input type="text" value="Projection vs Actual Chart - Ward View with Staffing"/>
Start Date	<input type="text" value="2021-04-13"/>
Start Time	<input type="text" value="07:00"/>
Healthcare Facility	<input type="text" value="Capital General"/>
Planning Groups	<input type="text" value="Cardiac"/>
Days To Project	<input type="text" value="6"/>
Roles	<input type="text" value="Nurse"/>
Required Ratio	<input type="text" value="PAR"/>
Ratio Type	<input type="text" value="Occupancy"/>
Show Staff Based On	<input type="text" value="Rostered"/>
Minimum Axis Value	<input type="text" value="0"/>
Maximum Axis Value	<input type="text" value="50"/>

Dashboard



ON DEMAND REPORTS

Reports can be run on demand by selecting **On Demand Reports** from the **Reporting** dropdown. They can be defined each time as needed.



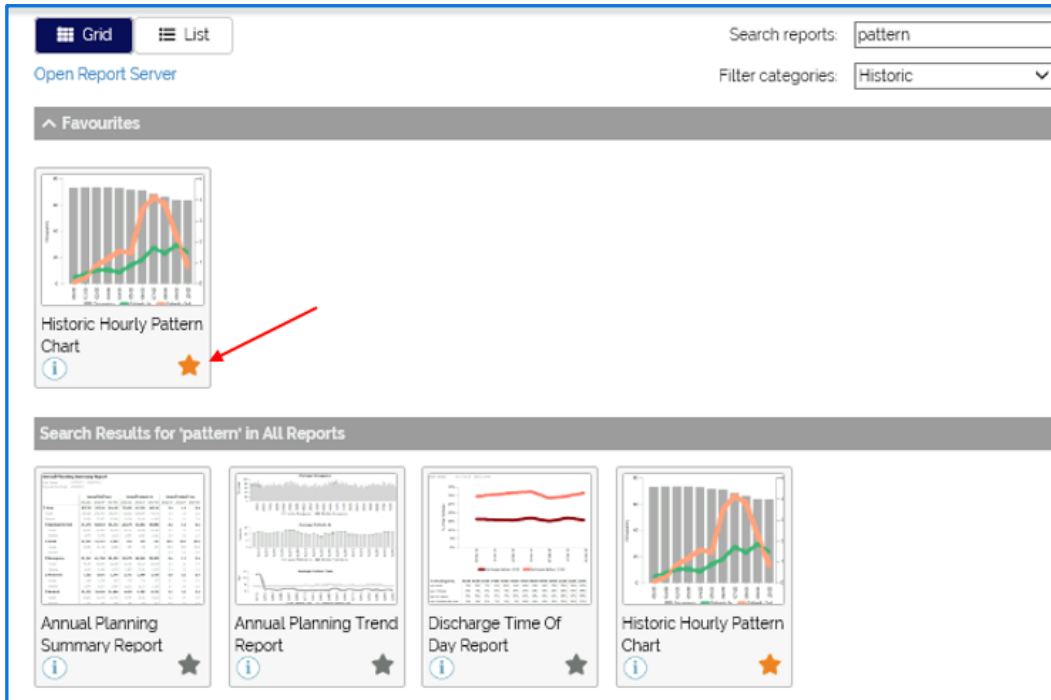
SEARCH AND FILTER

Enter key words in **Search reports** field to quickly locate the desired report. Choose a category from the **Filter categories** dropdown to view like reports together for ease of selection. This example shows filtering all the reports by just those that reflect "Historic" information. From there, it is further limited by only those referencing a "pattern" and the list got even smaller.



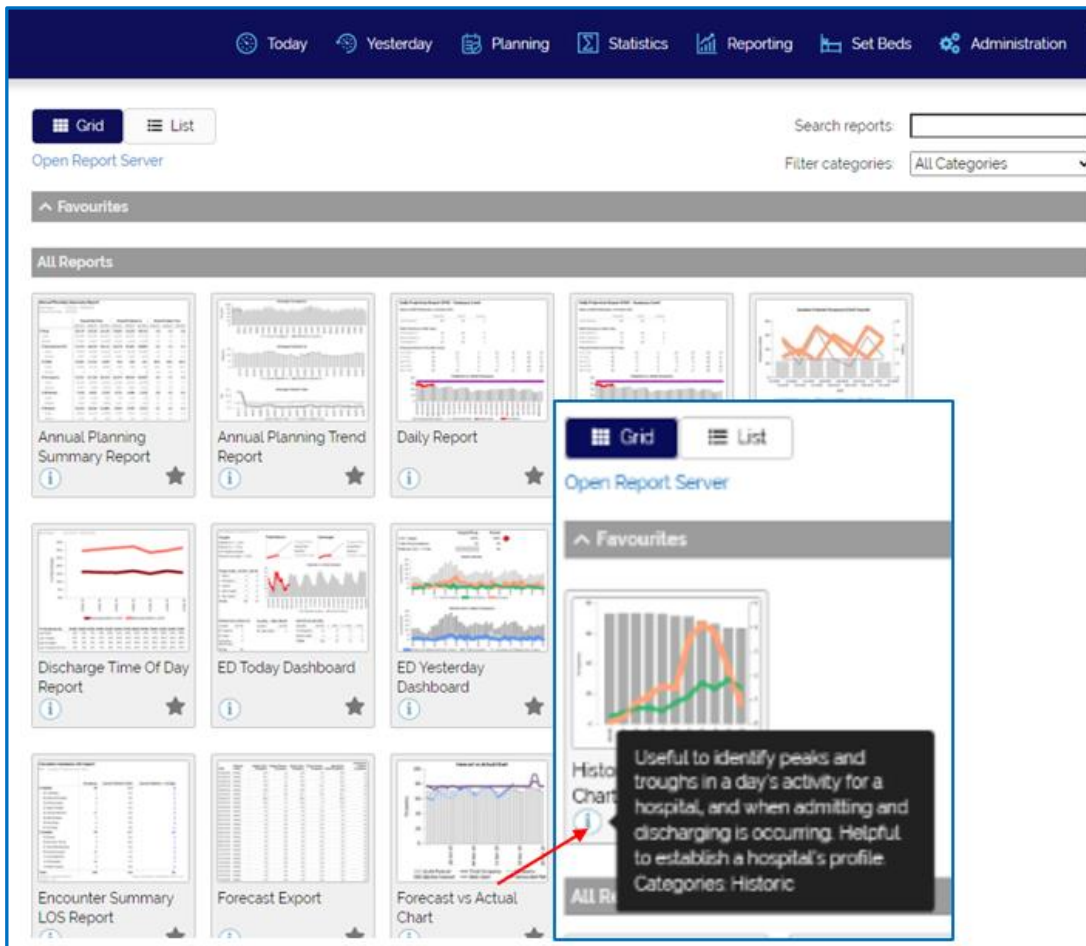
FAVORITES

After locating a report to be run again in the future, click the star to move the report into the **Favorites** section. To remove it, just click the gold star and it will be moved back under **All Reports**.



VIEW AS GRID

The report listing can be viewed in two ways. By default, it will display as a grid (see below). Report descriptions are visible by hovering over the “i” symbol.



VIEW AS LIST

The alternate view is the **List** view. This view displays the **Description** and **Categories** associated with each of the reports.

🕒 Today
🕒 Yesterday
📅 Planning
📊 Statistics
📈 Reporting
🏠 Set Beds
⚙️ Administration
?

☰ Grid

☰ List

Search reports:

Open Report Server
Filter categories: All Categories ▼

	Name	Description	Categories
^ Favourites			
All Reports			
	★ Annual Planning Summary Report	Used for analysing year-on-year patterns in a tabular format as part of the annual planning process.	Historic
	★ Annual Planning Trend Report	Used for analysing year-on-year patterns in a chart format as part of the annual planning process.	Historic
	★ Daily Report	Provides key information for the daily operational meeting, and assists with proactive planning for the next 2-4 days.	Projections, Staffing
	★ Daily Report with Staffing	Provides key information for the daily operational meeting, and assists with proactive planning for the next 2-4 days.	Projections, Staffing
	★ Daily Staff Projection Report	Used to monitor staff rostered against the projected staff requirement (calculated from projected occupancy) and the available beds against bed capacity.	Projections, Staffing
	★ Discharge Time Of Day Report	Useful to visualise the pattern of discharges throughout the day as part of managing patient flow. Patients can't be admitted until others have been discharged.	Historic
	★ ED Today Dashboard	Presents key, real time status and KPIs on the Acute Department, allowing hospitals to monitor their performance against targets and manage the	Acute, LOS, Projections

INDIVIDUAL REPORTS

The following pages include examples of each of the on demand reports. Those with an asterisk (*) are most-commonly used.

ANNUAL PLANNING SUMMARY REPORT

Description

Used for analyzing year-over-year patterns in a tabular format as part of the annual planning process.

Configuration

Choose one or multiple Planning Groups. Match the **Planning Level** to that used in Forecasting (generally Annual). Recommending setting **Expand/Collapse All** to “Collapse”.

How To Use

View changes by comparing **Bed Days**, **Patients In** or **Patient Turn** to previous 2 years of historical data.

Example:

Home > Reporting Centre > Annual Planning Summary Report

Start Date: 1/07/2018 | End Date: 30/06/2021
 Forecast Start Date: 1/04/2021 | Healthcare Facility: Capital General
 Planning Groups: Cardiac | Planning Level: Annual
 Show Growth: No | Expand/Collapse All: Collapse

Annual Planning Summary Report
 Date Range: 1/07/2018 - 30/06/2021
 Forecast Start Date: 1/04/2021

Specialty Name	Bed Days			Patients In			Patient Turn		
	2018/19	2019/20	2020/21	2018/19	2019/20	2020/21	2018/19	2019/20	2020/21
Capital General	13,090	10,223	6,486	4,302	3,228	2,168	3.0	3.2	3.0
Acute	9,597	7,322	4,665	2,909	2,254	1,493	3.3	3.2	3.1
Elective	3,493	2,901	1,822	1,393	974	675	2.5	3.0	2.7
Cardiac	13,090	10,223	6,486	4,302	3,228	2,168	3.0	3.2	3.0
Acute	9,597	7,322	4,665	2,909	2,254	1,493	3.3	3.2	3.1
Elective	3,493	2,901	1,822	1,393	974	675	2.5	3.0	2.7

Capacity Planner™
Version 8.2.0-00 | Report Generated: 21/04/2021 09:57 a.m.

ANNUAL PLANNING TREND REPORT

Description

Used for analyzing year-on-year patterns in a chart format as part of the annual planning process.

Configuration

Recommend choosing a single Service Group.

Home > Reporting Centre > Annual Planning Trend Report

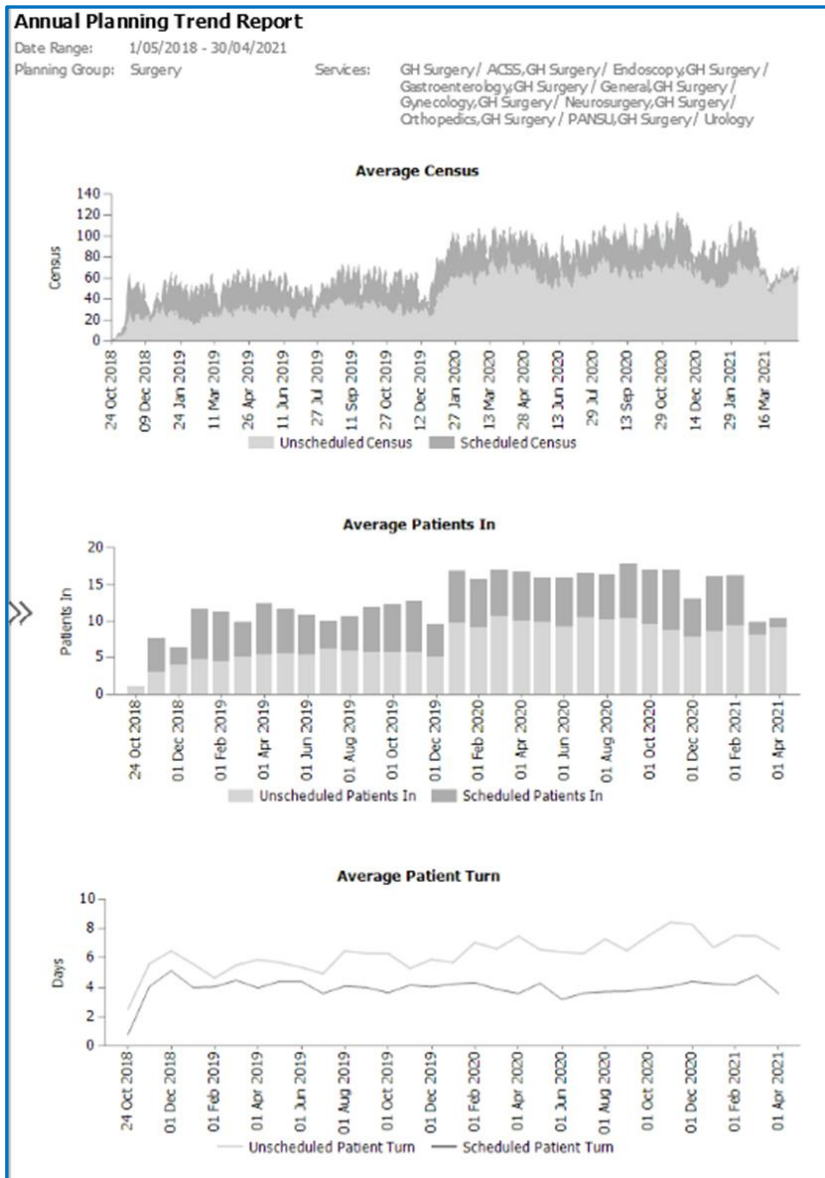
Start Date: 1/05/2018 | End Date: 30/04/2021
 Healthcare Facility: GH | Services: Surgery
 Admission Type: Unscheduled, Scheduled | Granularity: Monthly

Annual Planning Trend Report

How To Use

This is similar to the Annual Planning Summary Report, but in graphical form.

Example



DAILY REPORT AND DAILY REPORT WITH STAFFING

Description

Provides key information for the daily operational meeting and assists with proactive planning for the next 2-4 days.

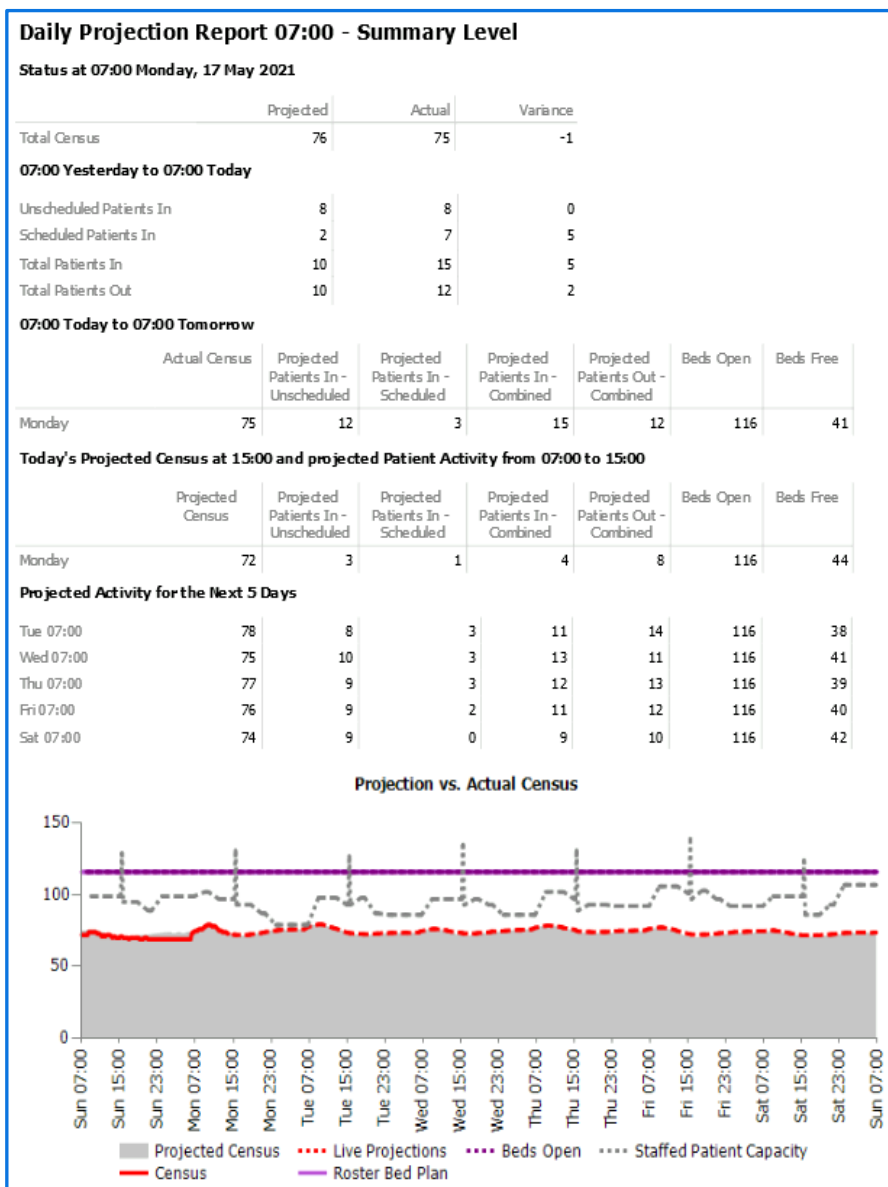
Can be run with or without staffing data.

Configuration

Home > Reporting Centre > Daily Report

Start Time	07:00	Review Time	15:00
Healthcare Facility	GH	Summary PGs	Surgery
Detail PGS	Surgery	Days To Project	6
Show Live Projections	Yes	Show Staff Capacity	Yes
Roles	NURSE	Required Ratio	PAR
Ratio Type	Projected Census	Show Staff Based On	Rostered
Min Axis Value Summary Chart	0	Max Axis Value Summary Chart	150
Axis Interval Summary Chart	50	Min Axis Value PG Charts	0

Example



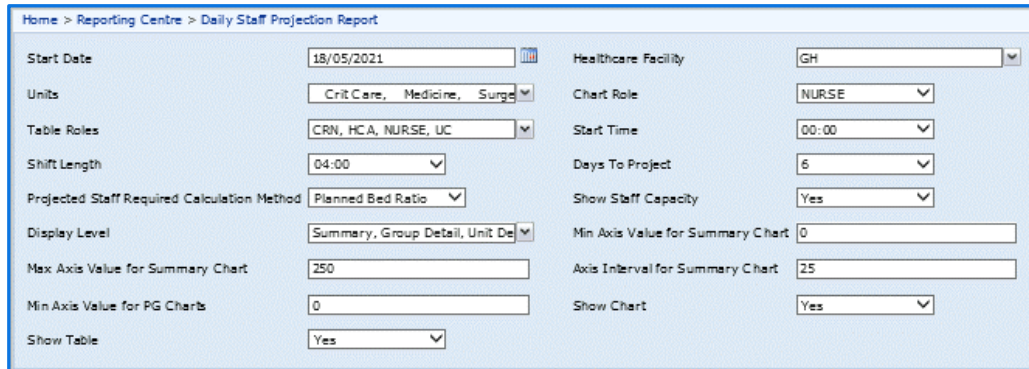
DAILY STAFF PROJECTION REPORT

Description

Used to monitor staff rostered (scheduled) against the projected staff requirement (calculated from projected occupancy) and the available beds against bed capacity to make any staffing adjustments in advance. Note: This report is set as a link on both the Hospital Today (Summary/PG/Unit Levels) and PG Today Dashboards (PG/Unit Levels).

Configuration

To view multiple locations in the hospital, set the **Display Level** to include "Summary". To view a single Planning Group or Unit, choose those to include those levels. Make sure the **Max Axis Value for Summary Chart** is set to exceed the maximum number of beds. Set the **Axis Interval...** to a value that matches the Max Axis value. Since only one role can be displayed in the charts, choose the Nurse or RN for the **Chart Role**. Any other roles can be added to the **Table Roles** choices.



Home > Reporting Centre > Daily Staff Projection Report

Start Date	18/05/2021	Healthcare Facility	GH
Units	Crit Care, Medicine, Surg	Chart Role	NURSE
Table Roles	CRN, HCA, NURSE, UC	Start Time	00:00
Shift Length	04:00	Days To Project	6
Projected Staff Required Calculation Method	Planned Bed Ratio	Show Staff Capacity	Yes
Display Level	Summary, Group Detail, Unit De	Min Axis Value for Summary Chart	0
Max Axis Value for Summary Chart	250	Axis Interval for Summary Chart	25
Min Axis Value for PG Charts	0	Show Chart	Yes
Show Table	Yes		

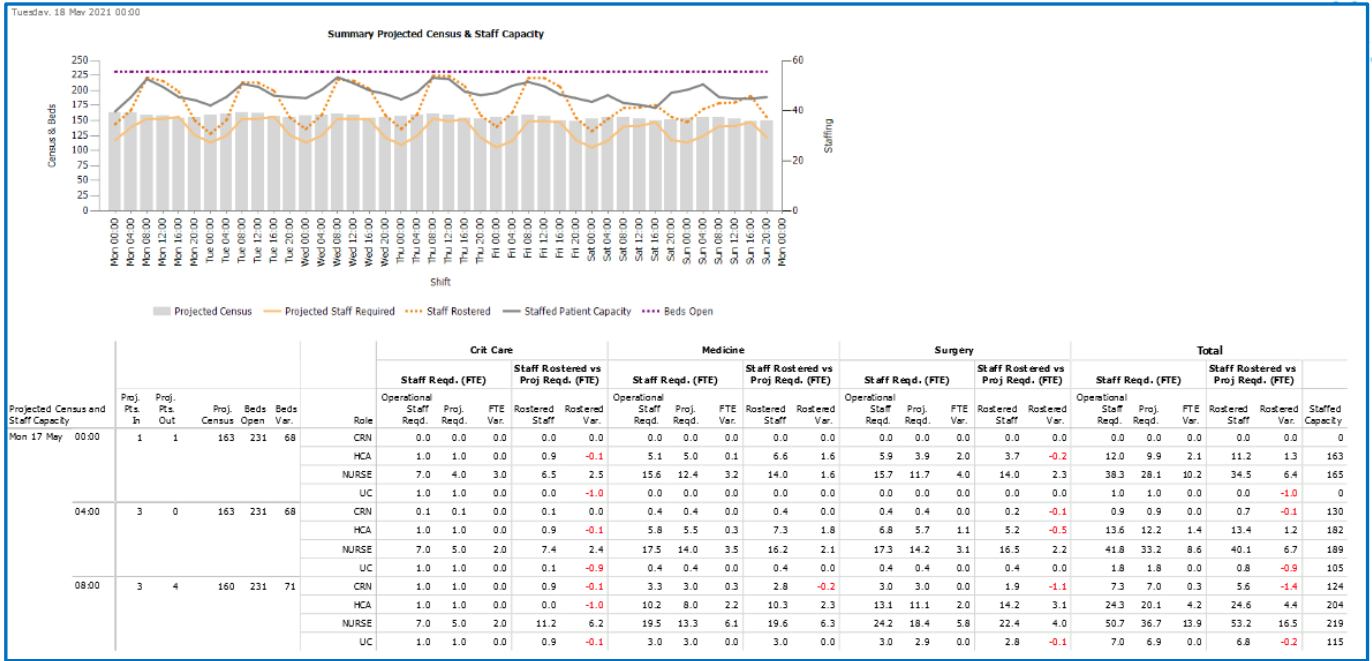
How To Use

View this report at least at the start and end of the week to make sure there is adequate staffing through the end of the week and then into the start of the following week. View the Summary level to get an overall picture of the hospital's staffing. Use the Planning Group level to make sure there are appropriate staffing levels across the group. Use the Unit level to check individual unit staffing.

Here is a list of the terms and their meanings from this report. Proj. Pts. In and Proj. Pts. Out: The number of patients expected to come into or leave from the location for the timeframe (admits or transfers or discharges)

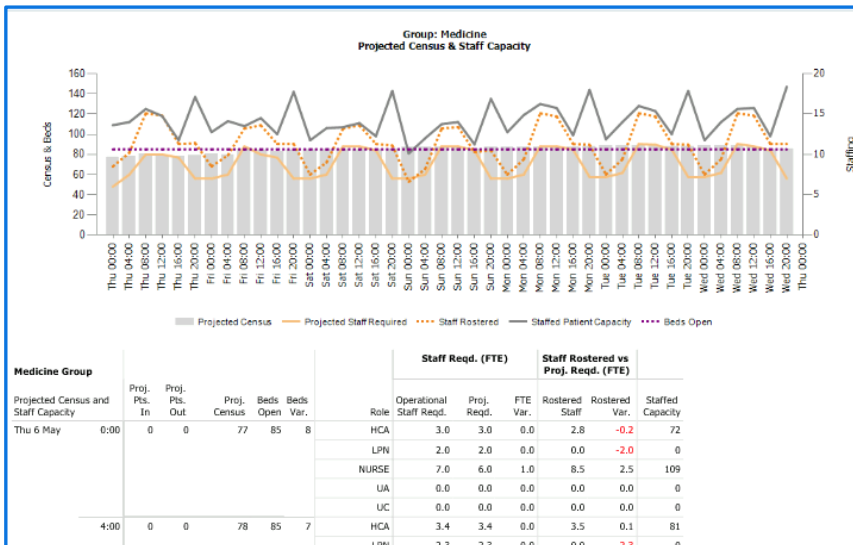
- **Proj. Census:** The number of patients projected during that time frame - based on the last 12 weeks of activity
- **Beds Open:** The number of beds planned to be staffed (e.g. budgeted or funded beds)
- **Beds Var.:** The difference between Beds Open and the projected census
- **Operational Staff Reqd.:** The number of staff required to care for patients if full to budgeted/funded capacity
- **Proj. Reqd.:** The number of staff required to care for the *projected* number of patients
- **FTE Var.:** The difference between Operational Staff Reqd. and Projected Reqd.
- **Rostered Staff:** The number of each role scheduled for that time frame (showing 1 decimal point to reflect only productive portion of FTE)
- **Staffed Capacity:** The number of patients that can be cared for by the number of staff scheduled

Summary View Example



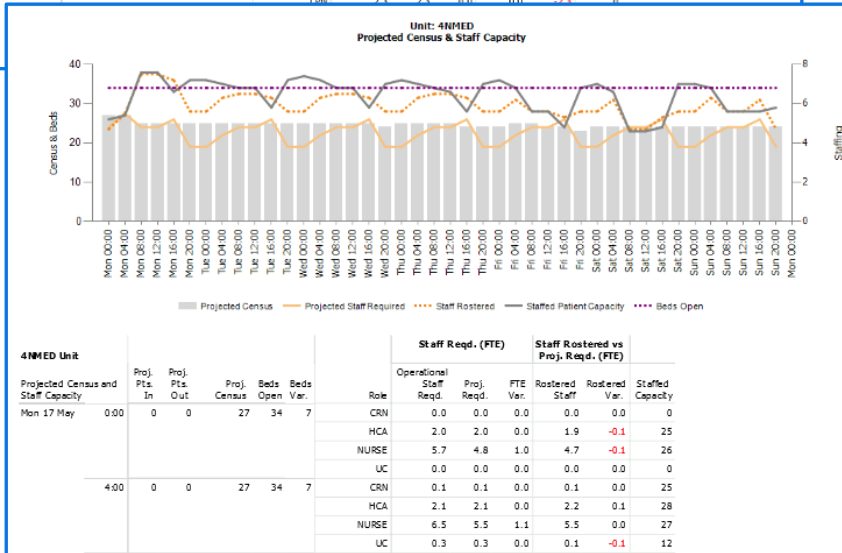
Group View Example

This would be used by Service Managers to be sure the service is staffed appropriately across the hospital. This view is included on both the Hospital and PG level version.



Unit View Example

This would be used by Unit Managers to check staffing for their individual unit.



DISCHARGE TIME OF DAY REPORT*

Description

Useful to visualize the pattern of discharges for the last several weeks and compare the same day to that day last week, last month, last quarter and last year as part of managing patient flow. Patients can't be admitted until others have been discharged, so this identifies either worrisome trends or progress as changes to workflow are made.

It helps identify patterns in discharges across a period and is used to monitor patient flow against targets.

Note: This report is often added to the Yesterday Dashboards for easy reference.

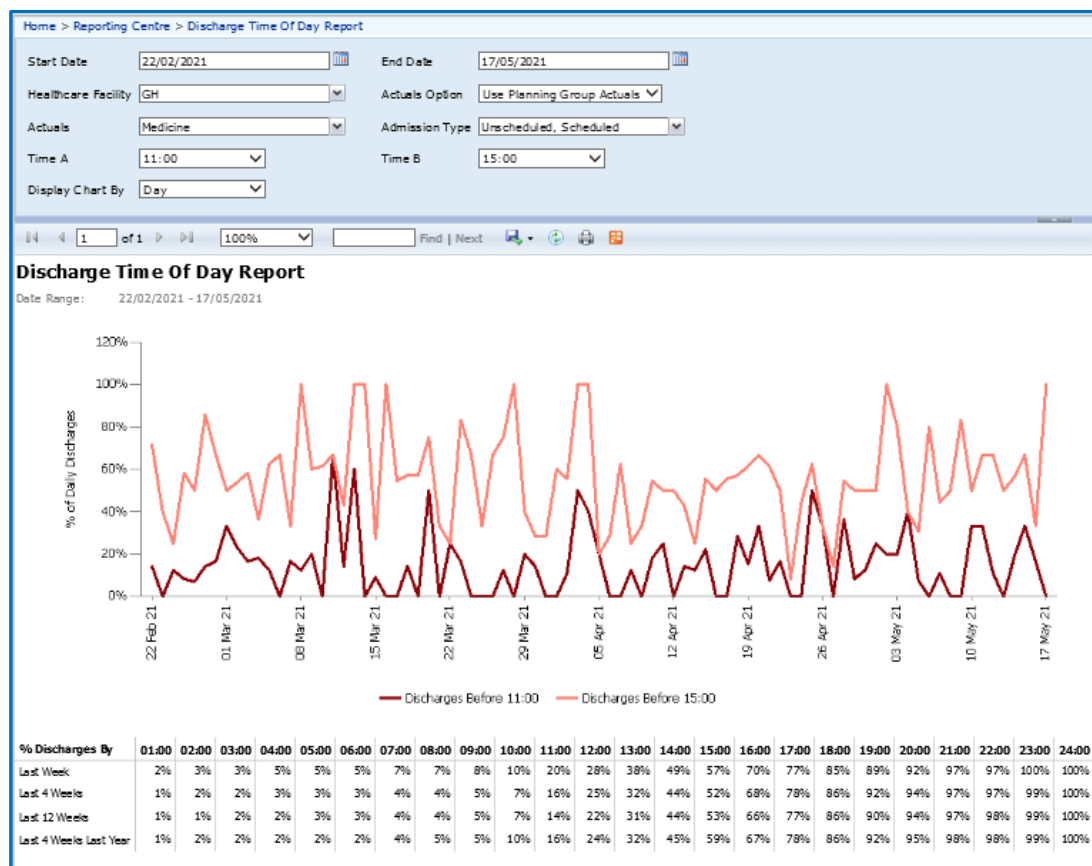
Configuration

There is no breakdown if choosing multiple areas, so select either a single Planning Group or Unit. Select the target discharge times in the **Time A** and **Time B** fields.

How To Use

Compare % of all discharges by hour of the day to the previous week, month, quarter, and year to monitor improvement. The goal is to move the % earlier in the day to prevent bottlenecks later.

Example



ED TODAY DASHBOARD

This report is a standard part of the Today Dashboards. See above under "Today" section.

ED YESTERDAY DASHBOARD

This report is a standard part of the Yesterday Dashboards. See above under "Yesterday" section.

ENCOUNTER DETAIL LOS REPORT

Description

Acts as a drill-through report to the Encounter Summary LOS Report, displaying the detail of the patients contributing to the LOS of a unit/service. This report is useful to determine which patients may be further managed to resolve LOS issues in a unit/service. This report may be limited by user Access Level, since it can display encounter-level information.

Provides details of patients contributing to the LOS of a service and helps manage LOS issues in a service

Configuration

Choose the Unit Type (e.g. Critical Care, Inpatient, Emergency) and then the Services to filter on the encounters to display. Note that Patient Name and Gender are not generally even sent to Capacity Planner, so they will be blank or show 'Unknown'.

How To Use

Use to troubleshoot issues when LOS appears to be unusually high in an area. It may indicate a patient who was not discharged in the registration system.

Example

The screenshot shows the 'Encounter Detail LOS Report' interface. At the top, there are several filter fields: Date (17/05/2021), Time (14:00), Healthcare Facility (GH), Unit Type (Inpatient), Services (Medicine), Admission Type (Scheduled, Unscheduled), Patients In > X (4), and Specify Patients In > X In (Days). A 'Show Patient Detail' dropdown is set to 'Yes'. Below the filters is a table with the following data:

Encounter ID	Patient ID	Patient Name	Gender	Current PG	Current Unit	Current Service	Current HCP	Admission Date	LOS
520628	456766		Unknown	Medicine	4WMED	GH Medicine / General	No Discharging HCP available	25/12/2020 12:44 a.m.	143
702482	545489		Unknown	Medicine	4SMED	GH Medicine / General	Elliott, Carolina	4/04/2021 1:22 p.m.	43
702920	545748		Unknown	Medicine	4WMED	GH Medicine / General	Brennan, Ralph	5/04/2021 10:13 a.m.	42
703761	479656		Unknown	Medicine	4SMED	GH Medicine / General	Elliott, Carolina	6/04/2021 11:10 a.m.	41
717305	545738		Unknown	Medicine	4SMED	GH Medicine / General	Elliott, Carolina	23/04/2021 10:23 a.m.	24
717555	482940		Unknown	Medicine	4WMED	GH Medicine / General	Brennan, Ralph	23/04/2021 3:17 p.m.	24
718917	460327		Unknown	Medicine	4WMED	GH Medicine / General	No Discharging HCP available	25/04/2021 1:14 a.m.	22
719945	506083		Unknown	Medicine	4NMED	GH Medicine / General	Unknown	26/04/2021 3:30 p.m.	21

ENCOUNTER EXPORT

Description

Gets Patient Encounters dependent on date range chosen.

Configuration

Be sure to select all Services to be sure to capture all the encounters needed. Use the Units field to limit the locations of those encounters. Choose to show those admitted, in hospital or discharged within the date range.

How To Use

In addition to basic Admission and Discharge information, this report also includes the “End To End LOS (Days)”. This represents their entire encounter length of stay – from presentation in Emergency until discharge or current date/time.

Examples

Home > Reporting Centre > Encounter Export Home | My Subscriptions | Site Settings | Help

Start Date: 25/03/2021 End Date: 21/04/2021 View Report

Healthcare Facility: Capital General Specialties: Cardiac

Wards: Cardiac Healthcare Professional: - Capital General, - Capital Gener

Encounter Lookup: Admission within Date Range

LU Encounter ID	Patient Code	First Name	Last Name	Age	Date Of Birth	Gender	Acute or Elective	Admitting Acute Ward	Admitting Acute Specialty	Discharging Acute Ward	Discharging Acute Specialty	Acute Admission Date	Acute Discharge Date
31255577	407A0F3A40C1E38D90E9DA92866286			84	1/01/1937	Unknown	Acute						
31255569	37F8243937586BD44E70C1E6402388			71	1/01/1950	Unknown	Acute						
31149138	A46C7F4A0288FA72C61BB3A1F20845			77	1/01/1944	Unknown	Elective						
31254936	2EF2DC57F916694B4CD75831A70CED			67	1/01/1954	Unknown	Acute						
31254816	5198938871DB562E0662BDD1841E3E			68	1/01/1953	Unknown	Acute						
31251998	5CF49E5474009978AC365E351356C			79	1/01/1942	Unknown	Elective						
31254427	A0F9FF5D9B459BEE924BFE65EA6FF2			48	1/01/1973	Unknown	Acute						
31252295	B55A76A3866700DD0321A788F18E16			82	1/01/1939	Unknown	Acute						
31252321	9D90347C9EE9AA053771E87C0CEC56			76	1/01/1945	Unknown	Acute						
31082671	CE09DFFC8C3E784EB1F2156E788CD9			56	1/01/1965	Unknown	Elective						

Home > Reporting Centre > Encounter Export Home | My Subscriptions | Site Settings | Help

Start Date: 20/04/2021 End Date: 17/05/2021 View Report

Healthcare Facility: GH Services: Clin Assess, GH Medicine / C

Units: Medicine Healthcare Professional: - GH, - GH, - GH, - GH, - GH

Encounter Lookup: Admission within Date Range

Admitting Inpatient Service	Admitting HCP Code	Discharging Inpatient Unit	Discharging Inpatient Service	Discharging HCP Code	Expected Admission Date	Inpatient Admission Date	Expected Discharge Date	Inpatient Discharge Date	Inpatient LOS (Days)	End To End Admission Date	End To End Discharge Date	End To End LOS (Days)
GH Medicine / General	12397	4NMED	GH Medicine / General			17/05/2021 12:00 p.m.			0.08	17/05/2021 12:00 p.m.		0.08
GH Medicine / General	3215	4WMED	GH Medicine / General			12/05/2021 10:54 p.m.			4.63	12/05/2021 10:54 p.m.		4.63
GH Medicine / General	4055	4NMED	GH Medicine / General			12/05/2021 5:44 p.m.			4.84	12/05/2021 5:44 p.m.		4.84
GH Medicine / General	1567	4WMED	GH Medicine / General			11/05/2021 7:14 p.m.			5.78	11/05/2021 7:14 p.m.		5.78
GH Medicine / General	4594	45MED	GH Medicine / General	4594		23/04/2021 12:37 p.m.		28/04/2021 10:35 a.m.	4.92	23/04/2021 12:37 p.m.	28/04/2021 10:35 a.m.	4.92

ENCOUNTER SUMMARY LOS REPORT

Description

Displays the Census, ALOS and Current Patients greater than X Days of a selected Services. This report is useful to determine if LOS is becoming an issue for a Service.

Configuration

Choose the target LOS in the **Patients In > X** field. If running for Emergency, change the **Specify Patients In > X In** to “Hours”.

How To Use

Use to identify specific Service issues with LOS (e.g. ALC or COVID patients).

Example

Home > Reporting Centre > Encounter Summary LOS Report

Healthcare Facility: GH | Unit Type: Inpatient
 Services: Medicine | Admission Type: Scheduled, Unscheduled
 Patients In > X: 4 | Specify Patients In > X In: Days
 Expand/Collapse All: Expand

1 of 1 | 100% | Find | Next

Encounter Summary LOS Report
 Date: Monday, 17 May 2021 14:00

	Census	Current Patients ALOS	Current Patients > 4 Days
<input type="checkbox"/> Medicine	74	11.4	48
GH Medicine / Blood Transfusions	0	0.0	0
GH Medicine / General	74	11.4	48
GH Medicine / Respiratory	0	0.0	0
Total	74	11.4	48

FORECAST EXPORT

Description

Gets Forecast Occupancy for a given range by Planning Group. This report is useful after annual planning has been completed.

Configuration

Can select multiple Planning Groups and they will display alphabetically for each date.

How To Use

Can show to Program or Service Directors/Managers to make sure they look appropriate – even if just for periods around seasonal or other events.

Example

Date	Planning Group	Roster Unscheduled Census	Roster Scheduled Census
19/04/2021	Medicine	92.5	6.7
19/04/2021	Surgery	68.4	15.5
20/04/2021	Medicine	93.1	6.7
20/04/2021	Surgery	69.1	19.0
21/04/2021	Medicine	92.6	6.7
21/04/2021	Surgery	69.3	25.0
22/04/2021	Medicine	91.7	7.2
22/04/2021	Surgery	69.2	32.1
23/04/2021	Medicine	91.5	7.7
23/04/2021	Surgery	68.2	37.1
24/04/2021	Medicine	91.1	7.7
24/04/2021	Surgery	68.7	34.9
25/04/2021	Medicine	92.1	7.7
25/04/2021	Surgery	69.1	27.3
26/04/2021	Medicine	92.7	7.1

FORECAST VS ACTUAL CHART

This report is a standard part of the Planning Dashboards. See example above under “Planning” section. The only reason to use in this section is to choose a different date range.

HISTORIC DAILY ACTIVITY CHART

Description

Useful to identify historic trends in patient activity, and to analyze specific time periods or special event activity, and the impacts of movements in and out on occupancy.

Patient occupancy at unit, service, planning group or hospital level.

Identify trends in patient activity, specific time or special event activity and impact of movement.

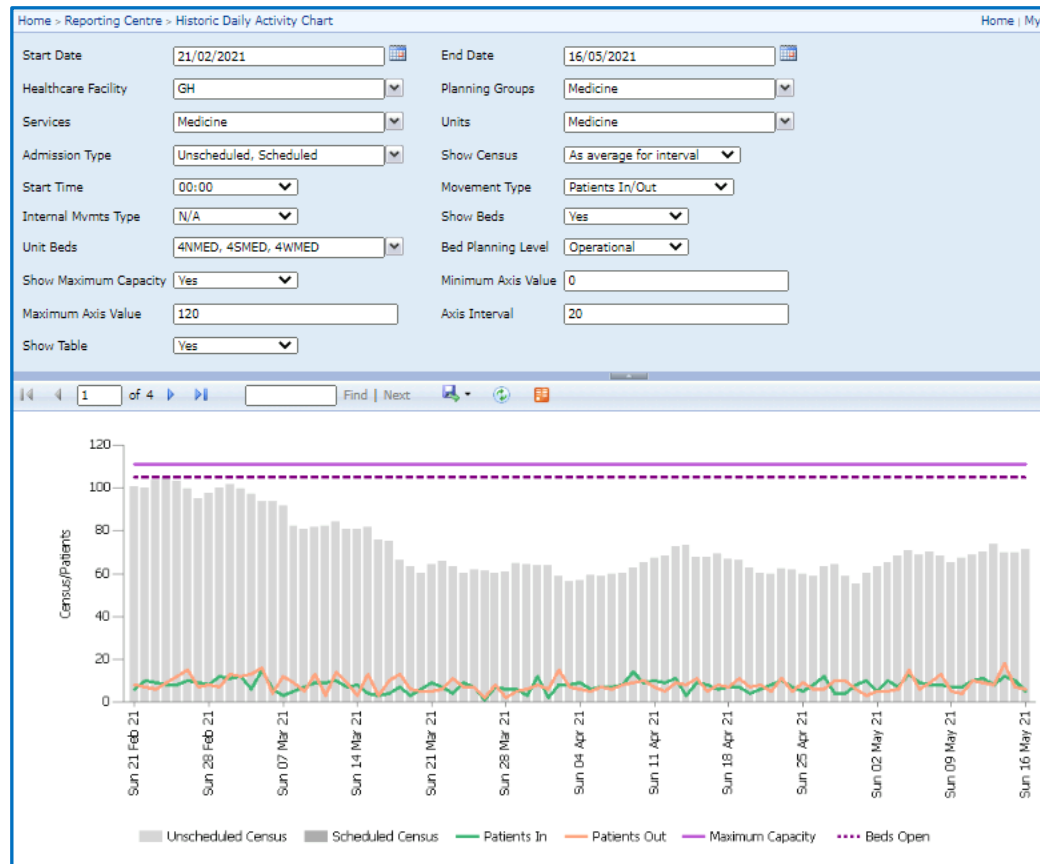
Configuration

Set **Show Table** to “Yes” to get exportable details. See examples of both first and second pages below.

How To Use

Choose different combinations if needing to see activity for a specific Service and time frame.

Example



Date	Unscheduled Census	Scheduled Census	Patients In	Patients Out	Beds Open	Maximum Capacity
Sun 21/02/2021	100	0	6	8	105	111
Mon 22/02/2021	100	0	10	7	105	111
Tue 23/02/2021	104	0	9	6	105	111
Wed 24/02/2021	105	0	8	9	105	111
Thu 25/02/2021	103	0	8	12	105	111
Fri 26/02/2021	100	0	10	15	105	111
Sat 27/02/2021	95	0	9	7	105	111
Sun 28/02/2021	98	0	8	8	105	111
Mon 01/03/2021	100	0	12	7	105	111
Tue 02/03/2021	102	0	11	13	105	111
Wed 03/03/2021	99	0	12	12	105	111
Thu 04/03/2021	97	0	6	13	105	111
Fri 05/03/2021	94	0	15	16	105	111
Sat 06/03/2021	94	0	6	4	105	111
Sun 07/03/2021	92	0	3	12	105	111
Mon 08/03/2021	82	0	5	9	105	111
Tue 09/03/2021	81	0	7	5	105	111

HISTORIC HOURLY PATTERN CHART

Description

Useful to identify peaks and troughs in a day's activity for a hospital, and when admitting and discharging is occurring. Helpful to establish a hospital's profile and staffing needs.

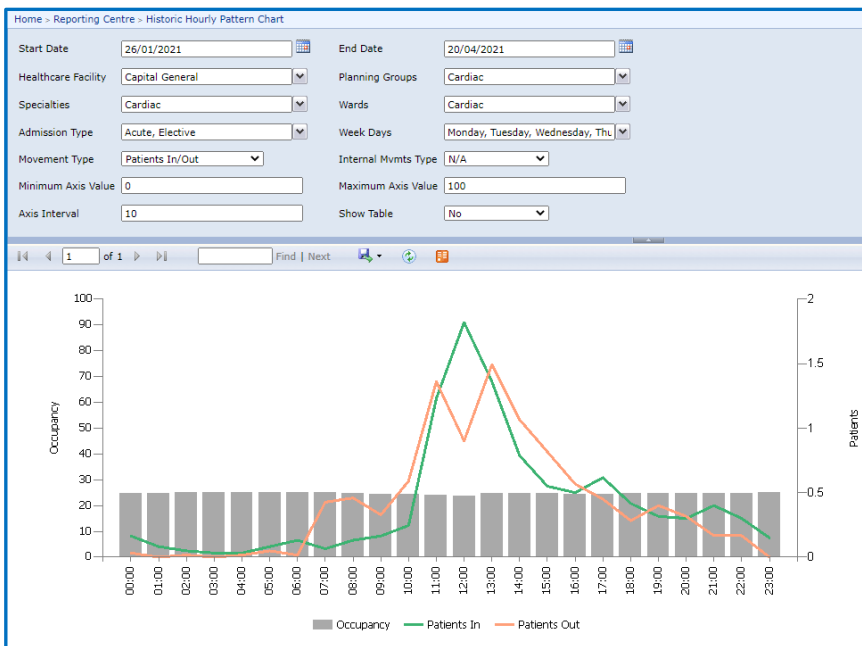
Configuration

This report can be run for a single Unit or an entire Planning Group. The Movement Type choices are Patients In/Out, Admissions/Discharges, External Transfers In/Out or Internal Transfers.

How To Use

If run separately (as in the examples below), the difference between inner-hospital transfers (Patients In or Out) and direct admits or discharges can be seen. In this example, the Patients In and Patients Out columns displaying larger values than Admissions and Discharges indicates some of the movements were transfers to and from other Planning Groups.

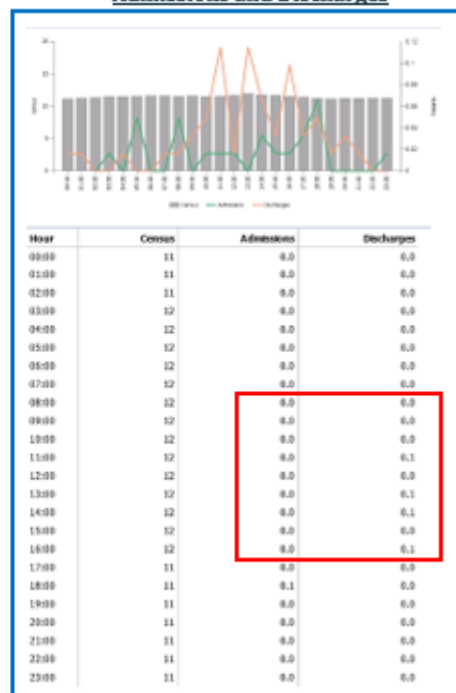
Examples



Patients In and Out



Admissions and Discharges



HISTORIC WEEKDAY PATTERN CHART*

Description

Shows average occupancy as well as the maximum and minimum values and patient movements by day of the week over a specified time period. This is useful in identifying any trends in occupancy and patient movements for an average week.

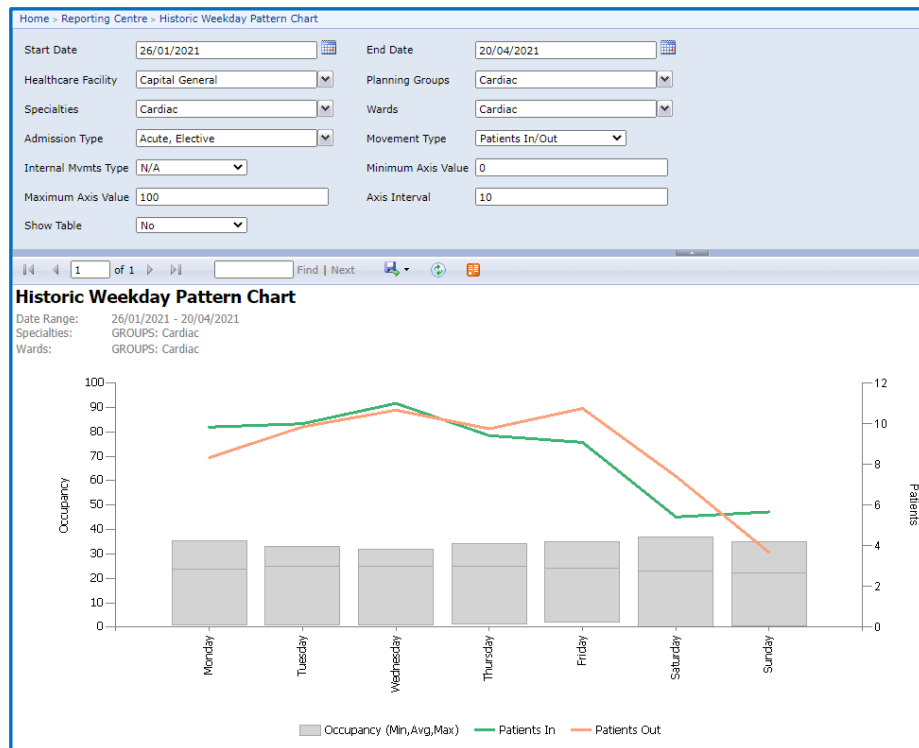
Configuration

Choices are to include Patients In/Out, Admissions/Discharges, External Transfers In/Out or Internal Transfers.

How To Use

Use this report to see if staffing needs can be changed based on variances in patient volumes by day of the week. It can also provide information about patient movements to make sure there are adequate patient transport staff available on days with high patient movement volumes (including transfers).

Example



HISTORIC XMAS ANALYSIS REPORT

Description

Useful for reviewing the Christmas performance and to analyze variance between the forecast and actual activity of the period, daily occupancy vs previous years actuals and bed day utilization vs previous years. It can also be used to compare other seasons across years to view the activity around other holidays.

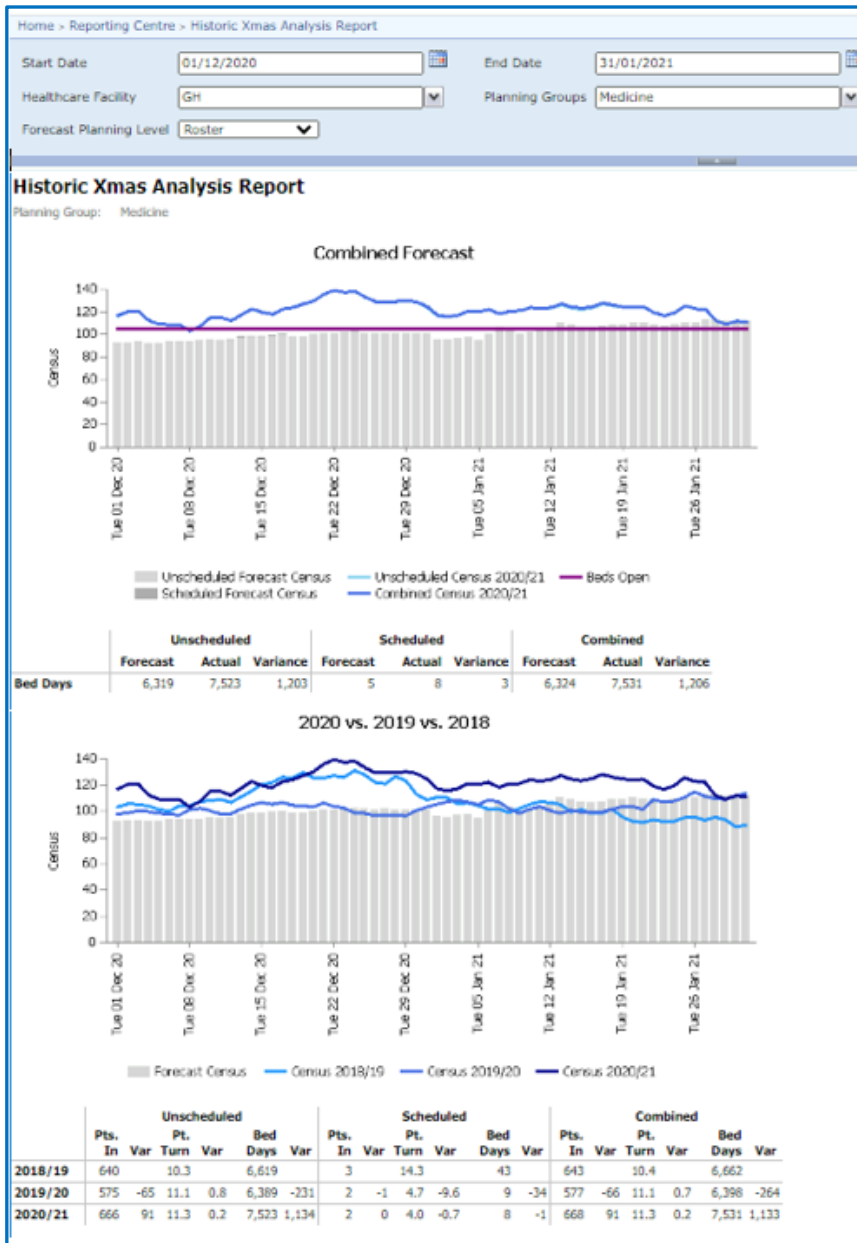
Configuration

Can choose one Planning Group or all inpatient groups to see how the days around holidays are impacted.

How To Use

View specific dates and their volumes on the 2nd and 3rd pages and use this information to plan for the coming holidays and make sure the Event Calendar is set appropriately.

Example



2 of 3 Find | Next

Date	Unscheduled Forecast Census	Unscheduled Actual Census	Scheduled Forecast Census	Scheduled Actual Census	Combined Forecast Census	Combined Actual Census	Variance	% Forecast Variance
Tue 01 Dec 2020	92.6	116.3	0.0	0.6	92.6	116.9	24.3	26.2%
Wed 02 Dec 2020	93.1	120.4	0.0	0.0	93.1	120.4	27.3	29.3%
Thu 03 Dec 2020	93.5	121.0	0.0	0.0	93.5	121.0	27.5	29.4%
Fri 04 Dec 2020	92.4	112.5	0.0	0.0	92.4	112.5	20.1	21.8%
Sat 05 Dec 2020	92.4	109.3	0.0	0.0	92.4	109.3	16.9	18.3%
Sun 06 Dec 2020	94.0	109.0	0.0	0.0	94.0	109.0	15.0	16.0%
Mon 07 Dec 2020	94.1	108.9	0.0	0.0	94.1	108.9	14.8	15.8%
Tue 08 Dec 2020	94.0	103.4	0.0	0.0	94.0	103.4	9.4	10.0%
Wed 09 Dec 2020	94.4	107.4	0.0	0.0	94.4	107.4	13.1	13.9%
Thu 10 Dec 2020	95.3	115.1	0.0	0.0	95.3	115.1	19.9	20.8%
Fri 11 Dec 2020	94.9	115.3	0.0	0.0	94.9	115.3	20.3	21.4%
Sat 12 Dec 2020	95.4	112.2	0.5	0.0	95.9	112.2	16.4	17.1%
Sun 13 Dec 2020	97.0	117.6	1.0	0.0	98.0	117.6	19.6	19.9%
Mon 14 Dec 2020	97.5	122.7	1.0	0.0	98.5	122.7	24.2	24.6%
Tue 15 Dec 2020	97.8	119.8	1.0	0.0	98.8	119.8	20.9	21.2%

HOSPITAL DASH INPATIENT REPORT - SPECIALTY VIEW

This report is part of the standard dashboard configuration. Refer to the “Today” section above for more information.

HOSPITAL DASH INPATIENT REPORT - WARD VIEW

This report is part of the standard dashboard configuration. Refer to the “Today” section for more information.

INPATIENT SUMMARY REPORT

Description

Provides key information from demand, supply, and planning perspectives to monitor performance and proactively plan to manage hospitals on a monthly basis.

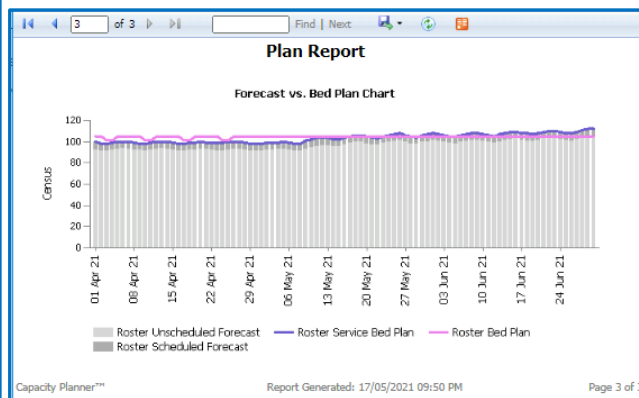
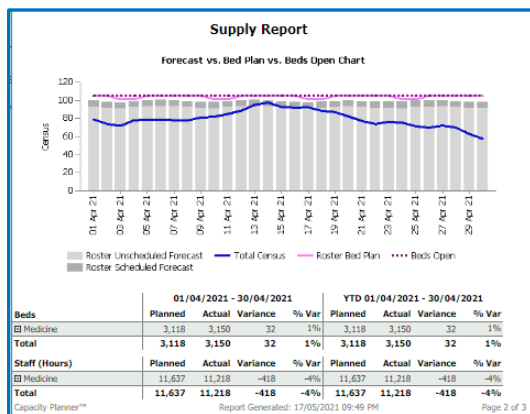
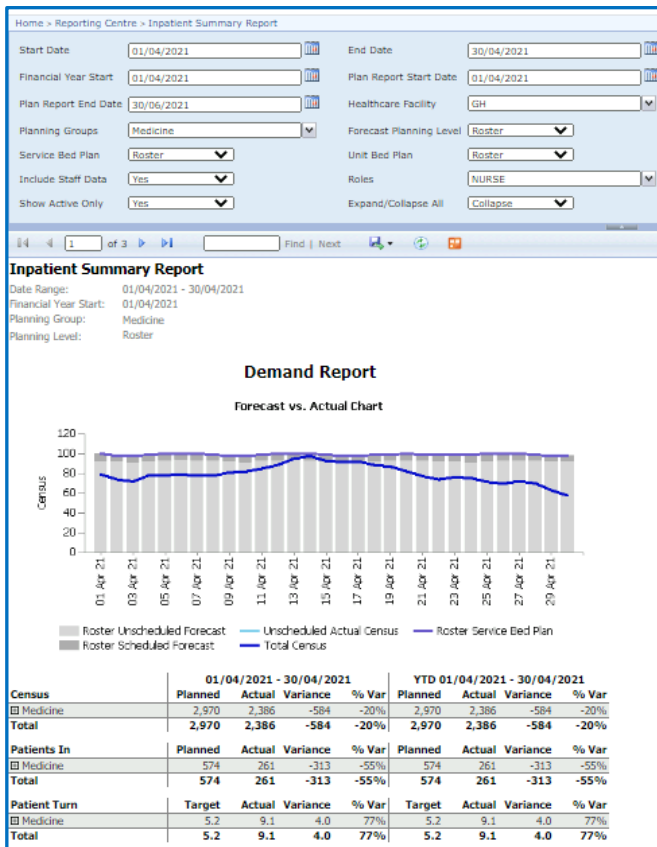
Configuration

Set Forecast Type as “Roster”.

How To Use

The first page uses long-range Forecast data to display the current Forecast and separates out the displays for Census, Patients In and Patient Turn.

Examples



INS AND OUTS - SPECIALTY VIEW

Description

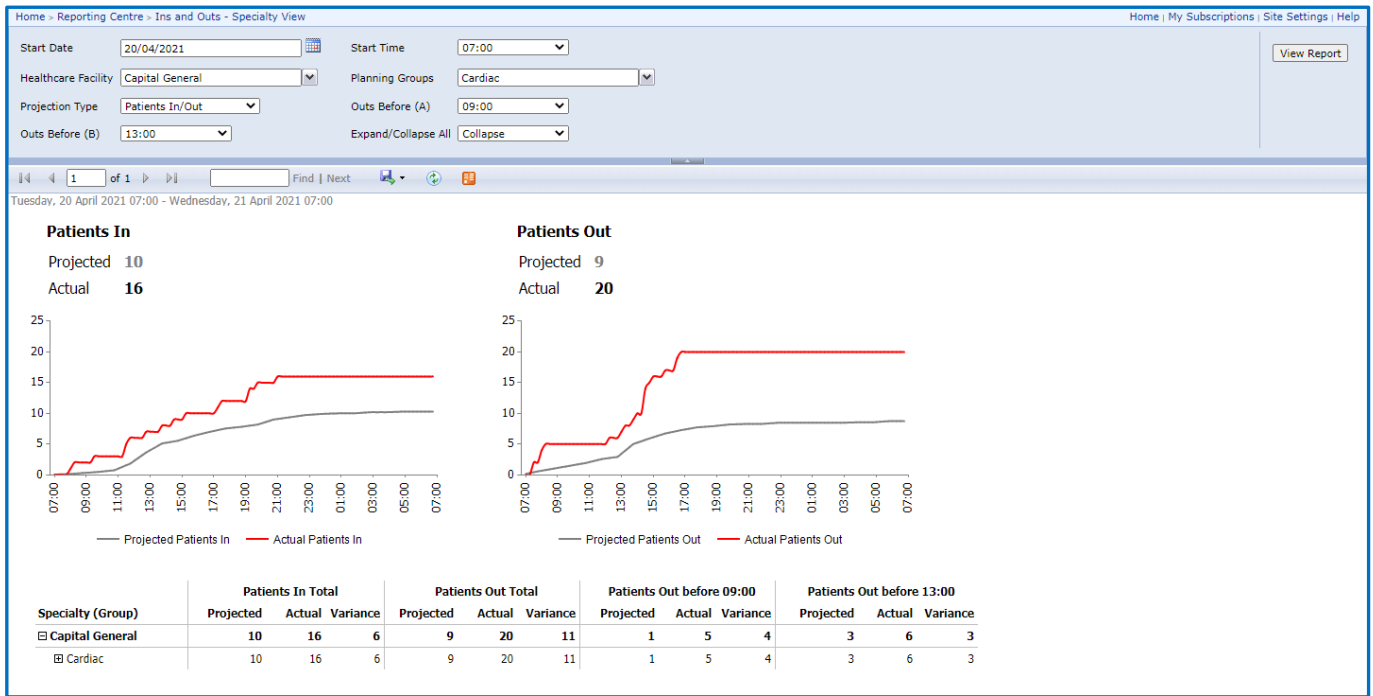
When run as a “Today” view, this report assists to understand hospital activity from a service type perspective against what is expected and to determine the levels of activity that may be expected over the next few hours. The “Yesterday” view assists to identify the causes of variance between actual and projected occupancy yesterday.

Configuration

Can choose to display either Patients In/Out or Admissions/Discharges.

Set the **Outs Before (A)** and **Outs Before (B)** to match your discharge target times.

Example



INS AND OUTS - WARD VIEW

This report is part of the standard dashboard configuration. Refer to either “Today” or “Yesterday” sections above for examples and details

OCCUPANCY MATRIX

This report is part of the standard dashboard configuration. Refer to “Today” section above for example and details (as “Census Matrix”).

OCCUPANCY SUMMARY MATRIX

Description

Key report that provides visibility of patient placements throughout the hospital by unit and service grouping for a defined time period of multiple days. Can be used on a weekly basis for patient management.

Configuration

Include all Inpatient groups and services. Can set for a date range.

How To Use

Use to monitor patient placement trends. See Average Daily Census, Total Bed Days, Admissions or Discharges.

Example

Ward	Specialty Total	Medical			Cardiac	
		HAPU	Medical	Medical	Cardiac 1	Cardiac 2
Beds Open		23	12	16	37	8
Bed Days	70	24	13	34		
Medical						
Gastroenterology	0	0	0	0		
General Medicine	40	24	13	0	3	
Immunology						
Medical Withdrawal						
Respiratory Medicine	0		0			
Cardiac						
Card - Angiogram	0			0		
Card - PTCA						
Cardio Aortic Valve	2			2		
Cardio CABG	3			3		
Cardio Mitral Stenosis	1			1		
Cardiology	16			16		
Cardiothoracic Surgery	3			3		
Thoracic Surgery	4			4		

OCCUPANCY VS ALOS CHART

Description

Used for monitoring trends in average length of stay (ALOS) and managing length of stay (LOS).

View length of stay and occupancy at unit, service, planning group or hospital level.

How To Use

Monitor trends in length of stay and occupancy.

Example

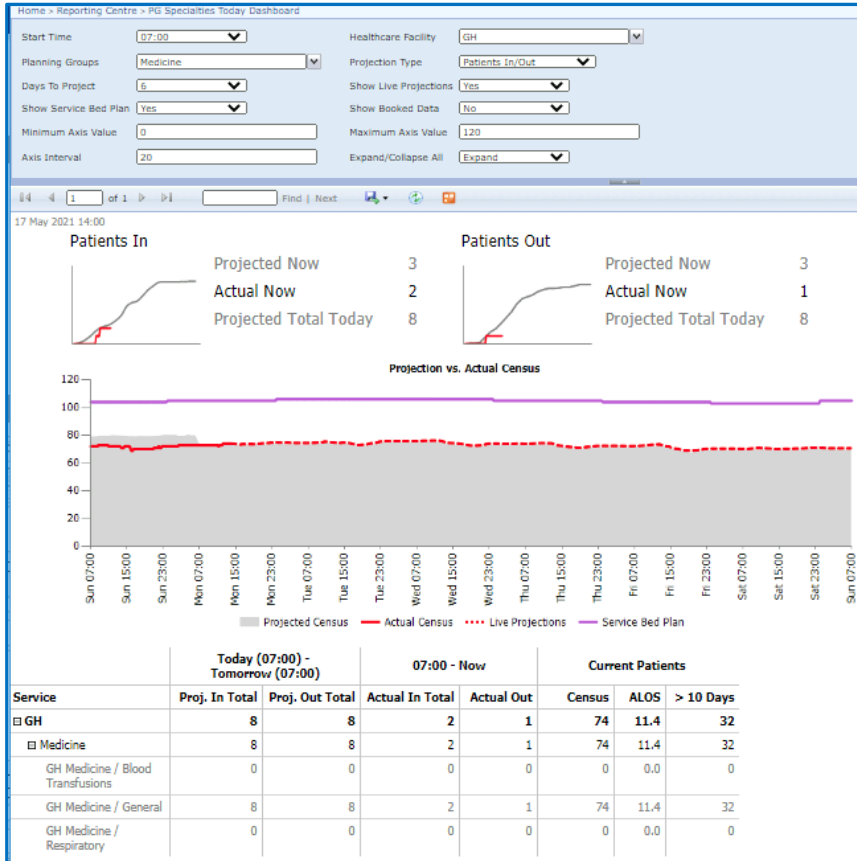


PG SPECIALTIES TODAY DASHBOARD

Description

Presents a cumulative and progressive view of Patients In and Out activity compared with projected activity for a Planning Group from a service type perspective. Can be used to determine which services may be driving discrepancies between resource and demand.

Example



PG WARDS TODAY DASHBOARD

This report is part of the standard dashboard configuration. Refer to the “Today” section for more information.

PATIENT EXPORT DETAIL

Description

Provides patient data (occupancy/patient movements/beds open) for a given date range and user-defined unit/service grouping. The use of this report may be limited due to patient-level

Configuration

The measures are aggregated at daily or hourly grains and are available as an “as at” value or an “interval average” value. Can also include internal unit transfers.

How To Use

This is especially helpful to see the number of transfers in or out within the same Planning Group (e.g. for Women’s Health).

Example

Home - Reporting Centre - Patient Export Detail

Start Date: 01/05/2021 End Date: 17/05/2021
 Healthcare Facility: SHS Units: Women's Health
 Services: Women's Health Aggregate: None
 Start Time: 00:00 Interval: 24:00
 Show Census: As Average for Interval Movement Type: Patients In/Out, Internal Transfers
 Internal Mvmts Type: Unit Internal Transfers

Date	Services	Units	Unscheduled Census	Scheduled Census	Total Census	Unscheduled Internal Transfers In	Scheduled Internal Transfers In	Unscheduled Internal Transfers Out	Scheduled Internal Transfers Out	Unscheduled Patients In	Scheduled Patients In	Unscheduled Patients Out	Scheduled Patients Out	Beds Open
01/05/2021 00:00	SHS Gynecology / General	6GYWH	3.76458	3.48958	7.25416	0	0	0	0	2	0	1	1	16
01/05/2021 00:00	SHS Gynecology / General	LDR	0.00000	0.00000	0.00000	0	0	0	0	0	0	0	0	40
01/05/2021 00:00	SHS Obstetrics / General	6GYWH	0.09236	0.00000	0.09236	1	0	1	0	0	0	0	0	16
01/05/2021 00:00	SHS Obstetrics / General	LDR	24.51181	7.73264	32.24445	10	4	0	0	0	1	18	8	40
01/05/2021 00:00	SHS Obstetrics / General	LDTRIP	0.23542	0.00000	0.23542	1	0	1	0	0	0	0	0	0
01/05/2021 00:00	SHS Obstetrics / General	MC3WH	4.97778	2.80694	7.78472	2	0	12	4	10	6	1	1	6
02/05/2021 00:00	SHS Gynecology / General	6GYWH	2.95278	3.00000	5.95278	0	0	0	0	0	0	3	0	16
02/05/2021 00:00	SHS Gynecology / General	LDR	0.00000	0.00000	0.00000	0	0	0	0	0	0	0	0	30
02/05/2021 00:00	SHS Obstetrics / General	LDR	18.90833	9.52500	28.43333	8	8	0	0	0	1	11	3	30

PATIENT EXPORT PG

Description

Provides patient data (occupancy/patient movements/unit or service beds) for a date range and planning group(s).

Configuration

There are several choices for the data elements to include (see below). They can all be included or excluded as needed.

How To Use

Use to monitor Internal and/or External Transfers and other patient movements for the Planning Group(s) selected.

Example

Date	Planning Group	Acute Occupancy	Elective Occupancy	Total Occupancy	Acute Admissions	Elective Admissions	Acute Internal Transfers In	Elective Internal Transfers In	Acute External Transfers In	Elective External Transfers In	Acute Internal Transfers Out	Elective Internal Transfers Out	Acute External Transfers Out	Elective External Transfers Out	Acute Discharges	Elective Discharges	Acute Patients In	Elective Patients In
20/04/2021 12:00 a.m.	Cardiac	24.25	8.93	33.18	9	2	0	1	3	2	0	1	4	3	9	4	12	
21/04/2021 12:00 a.m.	Cardiac	24.32	7.96	32.28	0	1	0	0	0	0	0	0	1	2	0	0	0	

PLANNING ASSUMPTIONS TREND REPORT

This report is part of the standard dashboard configuration. Refer to the “Planning” section for more information.

PLANNING ASSUMPTIONS VS. ACTUAL REPORT

Description

Key report used to review and analyze activity and occupancy against forecast assumptions as part of the planning process for the medium term.

Configuration

Can set to Expand or Collapse All contents (see examples below). If choosing to Collapse, the group(s) can still be expanded.

How To Use

Review as part of the Forecasting process to determine if changes are needed to correct a variance due to unexpected patient activity.

Examples Expanded and Collapsed

	Bed Days			Patients In			Patient Turn		
	Forecast	Actual	Variance	Forecast	Actual	Variance	Target	Actual	Variance
<input checked="" type="checkbox"/> Cardiac	0	751	751	0	265	265	0.0	2.8	2.8
Acute	0	559	559	0	187	187	0.0	3.0	3.0
Elective	0	191	191	0	78	78	0.0	2.5	2.5
<input checked="" type="checkbox"/> Card - Angiogram	0	9	9	0	5	5	0.0	1.8	1.8
Acute	0	8	8	0	4	4	0.0	2.1	2.1
Elective	0	1	1	0	1	1	0.0	0.0	0.0
<input checked="" type="checkbox"/> Card - PTCA	0	4	4	0	0	0	0.0	0.0	0.0
Acute	0	4	4	0	0	0	0.0	0.0	0.0
<input checked="" type="checkbox"/> Cardio Aortic Valve	0	26	26	0	0	0	0.0	0.0	0.0
Acute	0	26	26	0	0	0	0.0	0.0	0.0
<input checked="" type="checkbox"/> Cardio CABG	0	75	75	0	0	0	0.0	0.0	0.0
Acute	0	36	36	0	0	0	0.0	0.0	0.0
Elective	0	39	39	0	0	0	0.0	0.0	0.0
<input checked="" type="checkbox"/> Cardio Mitral Stenosis	0	10	10	0	0	0	0.0	0.0	0.0
Acute	0	0	0	0	0	0	0.0	0.0	0.0
Elective	0	10	10	0	0	0	0.0	0.0	0.0
<input checked="" type="checkbox"/> Cardiology	0	400	400	0	0	0	0.0	0.0	0.0
Acute	0	404	404	0	0	0	0.0	0.0	0.0
Elective	0	26	26	0	0	0	0.0	0.0	0.0
<input checked="" type="checkbox"/> Cardiothoracic Surgery	0	97	97	0	0	0	0.0	0.0	0.0
Acute	0	71	71	0	0	0	0.0	0.0	0.0
Elective	0	25	25	0	0	0	0.0	0.0	0.0
<input checked="" type="checkbox"/> Thoracic Surgery	0	99	99	0	0	0	0.0	0.0	0.0
Acute	0	36	36	0	0	0	0.0	0.0	0.0
Elective	0	64	64	0	0	0	0.0	0.0	0.0
Total	0	751	751	0	265	265	0.0	2.8	2.8

	Bed Days			Patients In			Patient Turn		
	Forecast	Actual	Variance	Forecast	Actual	Variance	Target	Actual	Variance
<input checked="" type="checkbox"/> Cardiac	0	751	751	0	265	265	0.0	2.8	2.8
<input checked="" type="checkbox"/> Medicine	2,808	1,981	-827	543	236	-307	5.2	8.4	3.2
<input checked="" type="checkbox"/> Surgery	2,778	1,952	-826	914	335	-579	3.0	5.8	2.8
Total	5,586	3,933	-1,653	1,457	571	-886	3.8	6.9	3.1

PROJECTED DISCHARGES REPORT

Description

Table showing the actual discharges yesterday compared to the projected today, along with the projected discharges for the rest of the week.

Configuration

Choose to expand or collapse as needed.

How To Use

Weekly patient management

Example

Home > Reporting Centre > Projected Discharges Report

Start Date: 21/04/2021 Start Time: 07:00
 Healthcare Facility: Capital General Wards: Cardiac
 Projection Type: Discharges Days To Project: 6
 Include In Report: Max Capacity, Beds Open, Yesterd Expand/Collapse All: Expand

1 of 1 Find | Next

	Yesterday and Today							Projected Discharges Next 6 Days					
	Max Capacity	Beds Open	Yesterday's Projected Occupancy for 07:00 Today	Todays Actual 07:00 Occupancy	Actual Admissions 07:00 Yesterday to 07:00 Today	Projected Discharges 07:00 Yesterday to 07:00 Today	Actual Discharges 07:00 Yesterday to 07:00 Today	Wed 07:00 Thu 07:00	Thu 07:00 Fri 07:00	Fri 07:00 Sat 07:00	Sat 07:00 Sun 07:00	Sun 07:00 Mon 07:00	Mon 07:00 Tue 07:00
Capital General	45	45	35	35	9	6	14	7	6	9	7	4	5
Inpatient	45	45	35	35	9	6	14	7	6	9	7	4	5
<input type="checkbox"/> Cardiac	45	45	35	35	9	6	14	7	6	9	7	4	5
Cardiac 1	37	37	35	35	9	6	14	7	6	9	7	4	5
Cardiac 2	8	8	0	0	0	0	0	0	0	0	0	0	0
Total	45	45	35	35	9	6	14	7	6	9	7	4	5

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PROJECTED INS AND OUTS

Description

This report is similar to Patient Movements In and Patient Movements Out in the Report Groups. It displays Projected Ins or Outs on a Planning Group level compared with actuals for Yesterday, Today, and Tomorrow. Admissions and Discharges are distinct from Transfers.

Configuration

Choose whether to display patients in or patients out – only one choice at a time.

How To Use

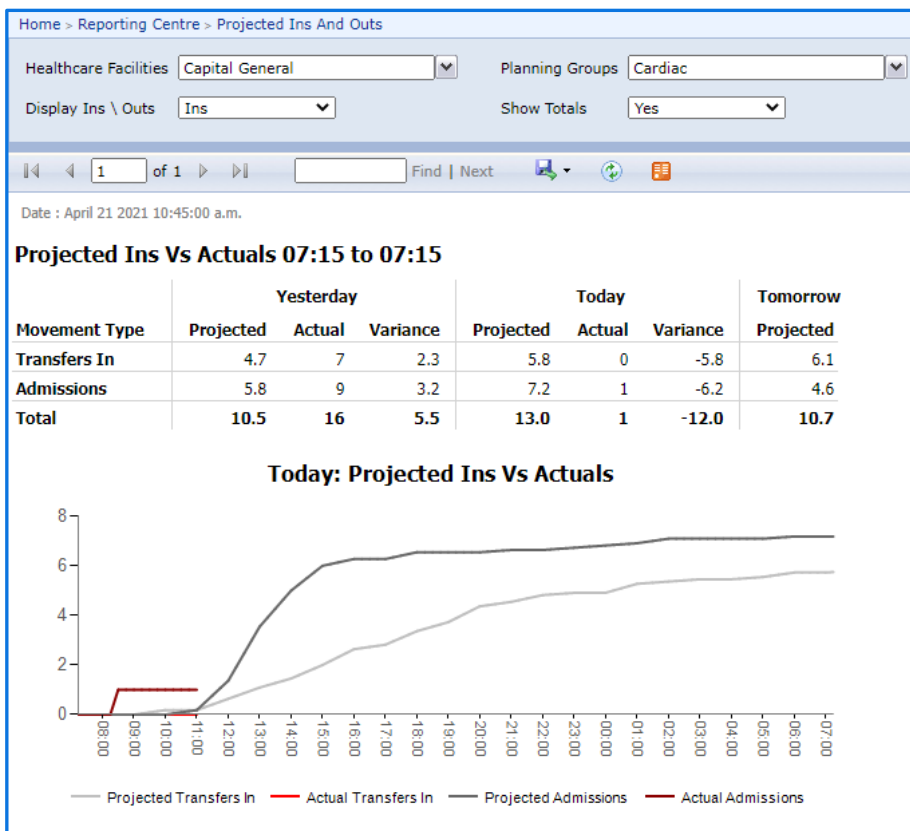
Compare actual and projected patient movements in (transfers in and admissions)

Provides information to support adequate capacity creation according to projections

Comparison of actual and projected patient movements out (transfers out and discharges)

Provides information to support adequate capacity creation according to projections

Example



PROJECTION EXPORT

Description

Provides either unit or unit projection data (occupancy/patient movements) for a given date, number of days to project and planning group or unit selection.

Configuration

Choose to display by Planning Group or Unit in the **Detail Level** dropdown. If choosing Unit, then each of the units within the Planning Group will display in a separate row for each date. Can also choose to show no movement types and see only the occupancy.

How To Use

Can be used to get projected census for each date

Examples

Home > Reporting Centre > Projection Export

Start Date: 21/04/2021 | Projection View: Ward
 Detail Level: Planning Group | Healthcare Facility: Capital General
 Planning Group Detail: Cardiac | Start Time: 07:00
 Interval: 24:00 | Days To Project: 6
 Movement Type: Admissions/Discharges, Patients In

Date	Planning Group	Acute Occupancy	Elective Occupancy	Total Occupancy	Acute Admissions	Elective Admissions	Acute External Transfers In	Elective External Transfers In	Acute External Transfers Out	Elective External Transfers Out	Acute Discharges	Elective Discharges	Acute Patients In	Elective Patients In	Acute Patients Out	Elective Patients Out
21/04/2021 7:00 a.m.	Cardiac	25	10	35	4.4	2.8	3.4	2.4	2.5	2.5	5.5	1.6	7.7	5.2	8	4.1
22/04/2021 7:00 a.m.	Cardiac	24.7	11.1	35.8	3	1.6	3.3	2.8	2.5	2.6	4.7	1.4	6.3	4.5	7.2	4
23/04/2021 7:00 a.m.	Cardiac	23.8	11.5	35.4	4.5	0.3	4	2	2.1	1.2	6.1	2.5	8.4	2.3	8.2	3.7
24/04/2021 7:00 a.m.	Cardiac	24.1	10.1	34.2	1.8	0	4.4	0.7	1	0	5.5	1.4	6.2	0.7	6.5	1.4
25/04/2021 7:00 a.m.	Cardiac	23.8	9.5	33.3	2.3	1.9	2.6	0.7	1.2	0.4	2.4	1.4	4.9	2.6	3.6	1.8
26/04/2021 7:00 a.m.	Cardiac	25.2	10.2	35.4	4.7	1.4	2.6	2	2.4	2.5	3.6	1.6	7.3	3.4	6	4.1

Home > Reporting Centre > Projection Export

Start Date: 18/05/2021 | Projection View: Unit
 Detail Level: Unit | Healthcare Facility: GH
 Planning Group Detail: Medicine | Start Time: 00:00
 Interval: 24:00 | Days To Project: 6
 Movement Type: None

Date	Planning Group	Unit	Unscheduled Census	Scheduled Census	Total Census
18/05/2021 00:00	Medicine	4NMED	25.1	0	25.1
18/05/2021 00:00	Medicine	4SMED	25.9	0	25.9
18/05/2021 00:00	Medicine	4WMED	26.6	0	26.6
19/05/2021 00:00	Medicine	4NMED	26.3	0	26.3
19/05/2021 00:00	Medicine	4SMED	27.1	0	27.1
19/05/2021 00:00	Medicine	4WMED	27.8	0	27.8
20/05/2021 00:00	Medicine	4NMED	25.8	0	25.8
20/05/2021 00:00	Medicine	4SMED	26.5	0	26.5
20/05/2021 00:00	Medicine	4WMED	27.3	0	27.3

PROJECTION VS ACTUAL CHART - SPECIALTY VIEW

Description

Provides real-time updates to show actual occupancy vs projected occupancy from a service type perspective, and guides decisions on the resource plan.

Configuration

Choose to Show Table (on subsequent pages) if wanting to export to Excel.

How To Use

Use if wanting to view projections by service regardless of location.

Example



Date Time	Projected Census	Actual Census / Live Projections	Service Bed Plan
17/05/2021 07:00	73.0	73.0	105.0
17/05/2021 07:15	73.0	73.0	105.0
17/05/2021 07:30	73.0	73.0	105.0
17/05/2021 07:45	73.0	73.0	105.0
17/05/2021 08:00	73.0	73.0	105.0
17/05/2021 08:15	73.1	73.0	105.0
17/05/2021 08:30	73.1	73.0	105.0
17/05/2021 08:45	73.2	73.0	105.0
17/05/2021 09:00	73.3	73.0	105.0
17/05/2021 09:15	73.3	73.0	105.0
17/05/2021 09:30	73.4	73.0	105.0
17/05/2021 09:45	73.5	73.0	105.0
17/05/2021 10:00	73.6	73.0	105.0
17/05/2021 10:15	73.6	73.0	105.0
17/05/2021 10:30	73.6	73.0	105.0
17/05/2021 10:45	73.6	73.0	105.0
17/05/2021 11:00	73.6	73.0	105.0

PROJECTION VS ACTUAL CHART - WARD VIEW

This report is part of the standard dashboard configuration on the Hospital and PG Today Dashboards. Refer to the "Today" section for more information.

PROJECTION VS ACTUAL CHART - WARD VIEW WITH STAFFING

This report is the same as the previous report.

SPECIAL EVENT ANALYSIS*

Description

This report is similar to the Historic Xmas Analysis Report. It is useful for special event planning and to analyze year-by-year variance of occupancy.

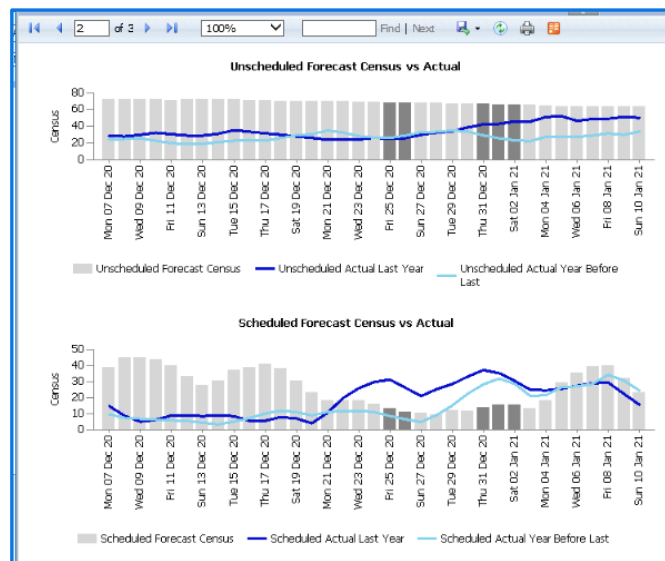
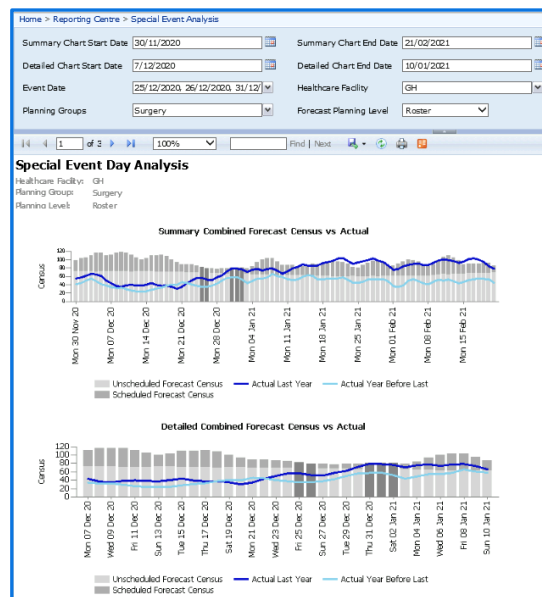
Configuration

The Christmas Eve and Christmas Day, along with New Year's Day and the day after are automatically selected. Choose other dates within the range as needed from the **Event Date** dropdown. Recommend choosing facility and Planning Group(s) and leave the rest of the defaults as is. To review other holidays, change the **Summary Chart Start and End Dates**. Any dates selected will display dark gray in the charts.

How To Use

Use this report to compare current year's Forecast and previous years' actuals for the selected date range and event dates. Each page shows different views, the last of which shows side-by-side views to compare current year to the previous two years.

Examples



Forecast This Year			Actual Last Year			Actual Year Before Last					
Roster	Unschedule	Roster	Roster	Unschedule	Scheduled	Total	Unschedule	Scheduled	Total		
Schedule	d Forecast	Schedule	Total	d Census	Census	Census	d Census	Census	Census		
Mon 07 Dec 20	73	39	111	Mon 09 Dec 19	29	15	44	Mon 10 Dec 18	25	10	34
Tue 08 Dec 20	72	45	117	Tue 10 Dec 19	28	9	37	Tue 11 Dec 18	25	8	33
Wed 09 Dec 20	72	45	117	Wed 11 Dec 19	30	5	35	Wed 12 Dec 18	26	7	33
Thu 10 Dec 20	72	44	116	Thu 12 Dec 19	33	6	39	Thu 13 Dec 18	23	6	29
Fri 11 Dec 20	71	40	111	Fri 13 Dec 19	31	9	40	Fri 14 Dec 18	20	6	26
Sat 12 Dec 20	72	33	105	Sat 14 Dec 19	29	9	38	Sat 15 Dec 18	19	6	24
Sun 13 Dec 20	73	27	100	Sun 15 Dec 19	29	9	38	Sun 16 Dec 18	19	5	24
Mon 14 Dec 20	72	30	103	Mon 16 Dec 19	31	9	41	Mon 17 Dec 18	21	3	25
Tue 15 Dec 20	72	37	109	Tue 17 Dec 19	36	9	44	Tue 18 Dec 18	23	5	28
Wed 16 Dec 20	71	39	110	Wed 18 Dec 19	34	6	39	Wed 19 Dec 18	24	7	31
Thu 17 Dec 20	71	41	111	Thu 19 Dec 19	32	6	37	Thu 20 Dec 18	23	10	33
Fri 18 Dec 20	70	38	108	Fri 20 Dec 19	30	8	38	Fri 21 Dec 18	26	12	38
Sat 19 Dec 20	70	30	101	Sat 21 Dec 19	28	7	35	Sat 22 Dec 18	29	11	41
Sun 20 Dec 20	70	23	94	Sun 22 Dec 19	26	4	31	Sun 23 Dec 18	31	9	40
Mon 21 Dec 20	70	18	88	Mon 23 Dec 19	24	11	35	Mon 24 Dec 18	35	11	46
Tue 22 Dec 20	70	18	88	Tue 24 Dec 19	24	20	44	Tue 25 Dec 18	33	12	45
Wed 23 Dec 20	69	19	88	Wed 25 Dec 19	25	26	50	Wed 26 Dec 18	28	12	40
Thu 24 Dec 20	69	16	85	Thu 26 Dec 19	27	30	56	Thu 27 Dec 18	27	11	38
Fri 25 Dec 20	68	14	82	Fri 27 Dec 19	25	31	57	Fri 28 Dec 18	26	9	35
Sat 26 Dec 20	68	11	79	Sat 28 Dec 19	26	26	52	Sat 29 Dec 18	29	7	36
Sun 27 Dec 20	68	10	79	Sun 29 Dec 19	30	21	51	Sun 30 Dec 18	33	5	38
Mon 28 Dec 20	68	10	77	Mon 30 Dec 19	33	25	58	Mon 31 Dec 18	34	9	43
Tue 29 Dec 20	67	12	79	Tue 31 Dec 19	34	28	63	Tue 01 Jan 19	35	15	50
Wed 30 Dec 20	67	12	79	Wed 01 Jan 20	39	33	72	Wed 02 Jan 19	34	23	56
Thu 31 Dec 20	66	14	81	Thu 02 Jan 20	42	37	80	Thu 03 Jan 19	29	28	58
Fri 01 Jan 21	65	16	81	Fri 03 Jan 20	43	35	78	Fri 04 Jan 19	26	32	58
Sat 02 Jan 21	65	15	81	Sat 04 Jan 20	46	30	76	Sat 05 Jan 19	23	29	52
Sun 03 Jan 21	65	13	78	Sun 05 Jan 20	46	25	71	Sun 06 Jan 19	23	21	44

STAFF EXPORT

Description

Provides Actual and Rostered Staff On per hour for a given date range and can display multiple roles for the selected Unit(s).

Configuration

If set to aggregate Units and Roles (1st example), either display in the report. If set to 'No', both will display, and an entire Planning Group can be selected, while still viewing individual Units (2nd example).

How To Use

Use to view differences between staff who were scheduled versus actual staffing to identify unplanned or unscheduled staffing.

Examples

Aggregated

Date Time	Actual Staff On	Rostered Staff On
5/1/2018 7:00 AM	10.30	0.88
5/1/2018 11:00 AM	7.67	0.00
5/1/2018 3:00 PM	7.29	0.00
5/1/2018 7:00 PM	6.57	8.00
5/1/2018 11:00 PM	21.17	8.00
5/2/2018 3:00 AM	26.99	8.00
5/2/2018 7:00 AM	11.26	1.00
5/2/2018 11:00 AM	6.02	0.00
5/2/2018 3:00 PM	6.06	0.00
5/2/2018 7:00 PM	4.51	8.00
5/2/2018 11:00 PM	15.73	8.00
5/3/2018 3:00 AM	20.19	8.00
5/3/2018 7:00 AM	10.62	1.00
5/3/2018 11:00 AM	6.71	0.00
5/3/2018 3:00 PM	6.50	0.00
5/3/2018 7:00 PM	6.70	7.00
5/3/2018 11:00 PM	12.71	7.00
5/4/2018 3:00 AM	15.54	7.00
5/4/2018 7:00 AM	8.87	0.88
5/4/2018 11:00 AM	7.91	0.00
5/4/2018 3:00 PM	8.63	0.00
5/4/2018 7:00 PM	8.03	7.00

Not Aggregated

Date Time	Unit	Role	Actual Staff On	Rostered Staff On
5/1/2018 7:00 AM	1S ICU	RN	5.79	0.75
	CVICU	RN	10.30	0.88
	MICU	RN	6.05	0.75
	SICU	RN	8.31	0.88
5/1/2018 11:00 AM	1S ICU	RN	4.79	0.00
	CVICU	RN	7.67	0.00
	MICU	RN	5.76	0.00
	SICU	RN	6.73	0.00
5/1/2018 3:00 PM	1S ICU	RN	5.07	0.00
	CVICU	RN	7.29	0.00
	MICU	RN	6.13	0.00
	SICU	RN	6.99	0.00
5/1/2018 7:00 PM	1S ICU	RN	2.22	5.00
	CVICU	RN	6.57	8.00
	MICU	RN	4.36	5.00
	SICU	RN	3.30	7.00
5/1/2018 11:00 PM	1S ICU	RN	3.32	5.00
	CVICU	RN	21.17	8.00
	MICU	RN	15.27	6.00
	SICU	RN	23.39	7.00
5/2/2018 3:00 AM	1S ICU	RN	4.21	5.00
	CVICU	RN	26.99	8.00
	MICU	RN	19.17	6.00
	SICU	RN	30.47	7.00

STAFF REQUIRED VS ROSTERED VS ACTUAL*

Description

Used to identify staffing gaps between rostered, actual, and planned staffing requirements for multiple roles. It can also show both Rostered and Actuals if running for date in the past. This example shows both with the PAR Required Ratio and displaying Projected Occupancy. (Note: This report is based on staffing to full capacity.)

Each page will display a different Role for the Planning Group and show all Units in the Planning Group on the same page. This may be a hyperlink on the Hospital Today Dashboards.

Configuration

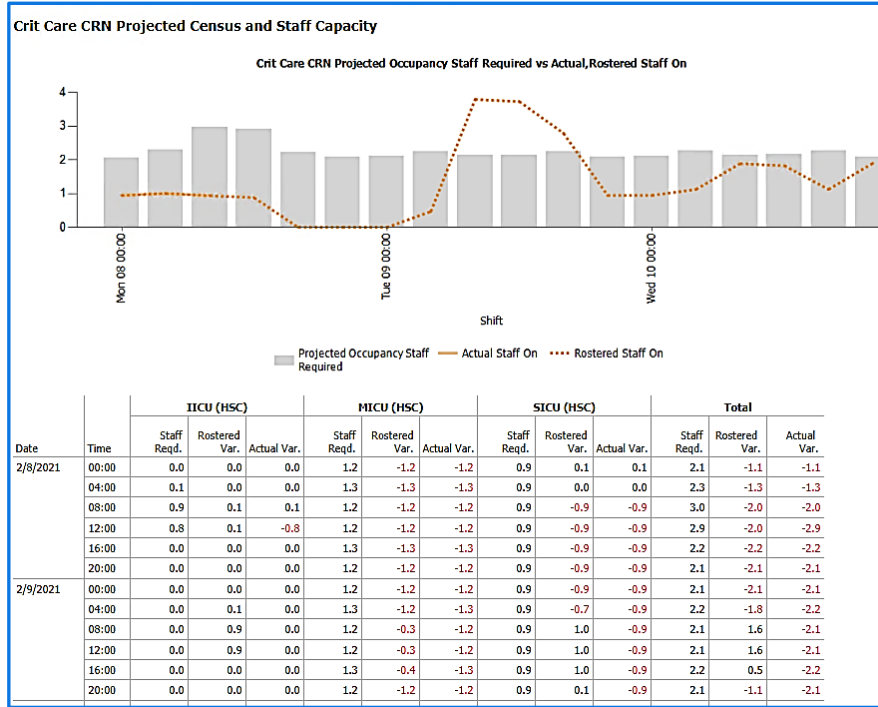
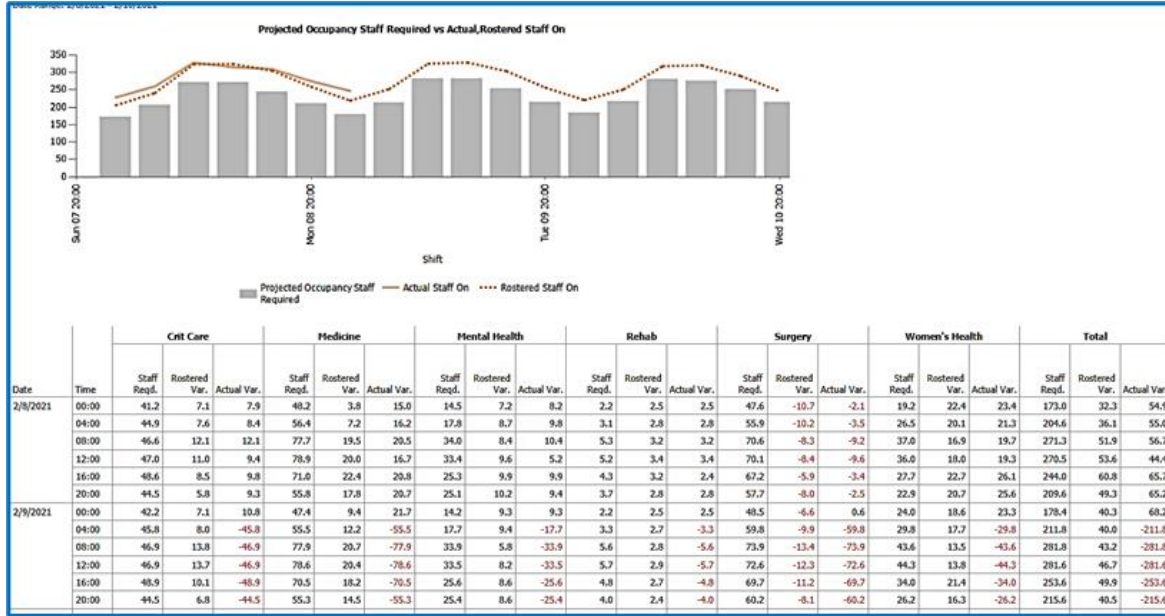
By default, it can include all Inpatient Units and Roles and is set to display the Projection and Actual Variances. These represent the difference between the staff required and those scheduled.

The way the report is defined, the date range can easily be changed (to display further in the past or a few more days in the future). The start time and shift length can also be changed, along with the selections of Planning Group and Roles.

How To Use

View each different role by unit to assure there are no staffing shortages or overages.

Examples



STATUS BY SPECIALTY

This report is part of the standard dashboard configuration. Refer to the "Today" section for more information (shown as "Status by Service").

STATUS BY WARD

Description

A detailed view of unit information over the last 24 hours and the last 7 days to review activity trends, LOS, and long-stay patients. It can be reviewed by Unit Managers daily to monitor trends and identify potential risks.

Configuration

Recommend expanding to view the details

How To Use

Use to track trends and volumes over the last 7 days.

Example

Home - Reporting Centre - Status By Ward

Report Date: 21/04/2021 Start Time: 11:30
 Healthcare Facility: Capital General Wards: Cardiac
 Admission Type: Acute, Elective Expand/Collapse All: Expand

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Status By Ward
 Summary Report of Patients Currently in Hospital per Ward
 Date: Wednesday, 21 April 2021, 11:30

Ward	Occupancy	Current Patients ALOS	Current Patients > 10 Days	Admissions Last 24 Hours	Transfers In Last 24 Hours	Discharges Last 24 Hours	Transfers Out Last 24 Hours	Admissions Last 7 Days	Transfers In Last 7 Days	Discharges Last 7 Days	Transfers Out Last 7 Days	ALOS Patients Discharged Last 7 Days	Beds Open
⊖ Inpatient	34	5.5	4	12	7	15	7	50	42	59	33	3.8	45
⊖ Cardiac	34	5.5	4	12	7	15	7	50	42	59	33	3.8	45
Cardiac 1	34	5.5	4	12	7	15	7	50	42	59	33	3.8	37
Cardiac 2	0	0.0	0	0	0	0	0	0	0	0	0	0.0	8
Total	34	5.5	4	12	7	15	7	50	42	59	33	3.8	45

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Census As At 14:00 Last 7 Days

Planning Group Name	Wed 10 Mar	Thu 11 Mar	Fri 12 Mar	Sat 13 Mar	Sun 14 Mar	Mon 15 Mar	Tue 16 Mar
⊖ Inpatient	67	75	69	67	71	73	89
⊖ Surgery	67	75	69	67	71	73	89
3ESUR	2	4	3	0	0	6	4
3NSUR	27	32	26	28	31	31	37
3SSUR	28	30	28	28	31	28	33
3WSUR	10	9	12	11	9	8	15

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TRANSFERS MATRIX - PG DETAIL

Description

Provides a detailed view of transfers, external and internal, within units in a planning group for a specific day.

Configuration

This is a very complicated report and can be configured multiple ways. Here are some tips.

Date: Choose the previous date to see yesterday's transfers.

Planning Groups: Include all inpatient PGs.

Transfers from External: Include any non-inpatient units (like ED inpatient or Day Stay).

Transfers From Internal Areas: Choose individual inpatient Units to display without having to expand manually.

Transfer From Inpatient PGs: Include any assessment PGs.

How To Use

View where patients who transferred into each unit originated.

Example

Home > Reporting Centre > Transfers Matrix - PG Detail

Date: 18/05/2021 Start Time: 07:00
 Healthcare Facility: GH Planning Groups: Crit Care, Medicine, Palliative Care
 Transfers From External: EDIP Transfers From Internal Areas: ICU, 4NMED, 4SMED, 4WMED
 Transfers From Inpatient PGs: Clin Assess

1 of 1 100% Find | Next

Transfers Matrix - PG Detail
 Tuesday, 18 May 2021 07:00 - Wednesday, 19 May 2021 06:59

	3ESUR	3NSUR	3SSUR	3WSUR	4NMED	4SMED	4WMED	HPAL	ICU	Planning Group Total
Direct Admissions	5	1	0	0	0	0	0	0	0	6
External Transfers from External Locations:										
EDIP	0	0	1	0	0	1	0	0	0	2
Other Areas	0	1	0	0	0	0	0	0	0	1
Total External Patients In	0	1	1	0	0	1	0	0	0	3
Internal Transfers from Internal Locations:										
3ESUR	0	0	1	4	0	0	0	0	0	5
3NSUR	0	0	0	0	0	0	0	0	0	0
3SSUR	0	0	0	0	0	0	0	0	0	0
3WSUR	0	0	0	0	0	0	0	0	0	0
4NMED	0	0	0	0	0	0	0	0	1	1
4SMED	0	0	0	0	0	0	0	0	0	0
4WMED	0	0	0	0	0	0	0	0	0	0
HPAL	0	0	0	0	0	0	0	0	0	0
ICU	0	0	0	0	0	0	1	0	0	1
Inter PG Transfers:										
Clin Assess	0	0	0	0	0	0	0	0	0	0
Total Internal Patients In	0	0	1	4	0	0	1	0	1	2
Total Patients In	5	2	2	4	0	1	1	0	1	11

TRANSFERS MATRIX - PG SUMMARY

Description

Provides a detailed view of transfers, external and internal, within planning groups for a specific day.

Breaks down external and internal transfers, admissions, and discharges within a planning group for a specific day.

Analyze patient movement trends.

Configuration

The report can be created using any Healthcare Facility (HCF), and user specified location entities. It can also be run for a user specified date and time. Transfers are read from left to right – rows indicate the transfer’s origin columns indicate the transfer’s destination. The report can be run on demand and can also be published in any format e.g. PDF, Excel, or Word.

How To Use

This report is useful to view and track patient transfers. It includes direct admissions, transfers from Day Stay and transfers from external locations (e.g. ED hold areas, Day of Surgery, etc.). This report also displays transfers from internal areas (e.g. a patient being transferred from a medical unit to a surgical unit).

Example

	Inpatient Planning Groups				General Inpatient Beds	Other Planning Groups					Total New Patients	
	AT&R	Medical	Surgical	Assessment Unit		ICU / HDU	Maternity	Paediatric	Peri-Operative	SCBU		
Direct Admissions	2	16	9		27	12	1	10	9	37	0	96
External Transfers												
☐ Transfers from External Locations:												
Assessment Unit	0	2	0		2	0	0	0	0	0	0	2
Other Areas	0	3	0		3	0	0	0	0	0	1	4
Total External Patients In	0	5	0		5	0	0	0	0	0	1	6
											102	
☐ Transfers from Internal Locations:												
ICU / HDU	0	0	2		2	0	0	0	0	0	0	0
Maternity	0	0	0		0	0	0	0	0	0	0	0
Paediatric	0	0	0		0	0	0	0	0	0	0	0
Peri-Operative	0	0	13		13	0	0	0	0	0	0	0
SCBU	0	0	0		0	0	0	0	0	0	0	0
Inter PG Transfers:												
AT&R	0	0	0		0	0	0	0	0	0	0	0
Medical	0	0	0		0	0	0	0	0	0	0	0
Surgical	0	0	0		0	0	0	0	0	0	0	0
Total Internal Patients In	0	0	15		15	0	0	0	0	0	0	0
Total Patients In	2	21	24		47	12	1	10	9	37	1	

FAQ's

This section includes the questions for all users and IT administrators.

HOW DO I LOG ONTO CP?

This will be outlined at the beginning of the Activation and provided in the training documentation. It will vary between clients.

After the Activation stage, contact your helpdesk for log on and access information specific to you.

HOW DO I CHANGE MY PASSWORD IF I CAN'T REMEMBER IT?

Passwords are not controlled within CP.

Contact your helpdesk and request your password to be reset.

HOW DO I SET UP A NEW USER IN CP?

This will need to be managed via your internal helpdesk as a new user request must be authorized by the appropriate team.

HOW DO I CHANGE SOMEONE'S ACCESS IN CP?

This will need to be managed via your internal helpdesk as a change of access request must be authorized by the appropriate team.

HOW DO I KNOW IF THE DATA FEEDS ARE NOT GOING THROUGH TO CP?

An email trigger has been set up in CP which will send emails to the relevant people on both the client site and the vendor helpdesk to advise that a feed has been missed and at what time the last one came through.

You will also see that the red actuals line on the Projected vs Actual Occupancy dashboard has flat lined.

The team who receives these emails has been determined by your project team as part of the implementation of CP.

HOW DO I READ THE TODAY DASHBOARDS?

This will be the first dashboard which will appear when you log onto CP. It gives information about the hospital's current status. It provides a summary view of the hospital, and visibility of how individual services are contributing to the overall picture.

WHY DO MY DASHBOARDS KEEP FLASHING OFF AND ON WHEN THE SCREEN IS LEFT OPEN?

Your dashboards refresh every 3 minutes to ensure that the information that is displayed is accurate to current time as possible.

Messages are being sent through to CP from the registration system that provide the information on the dashboards.

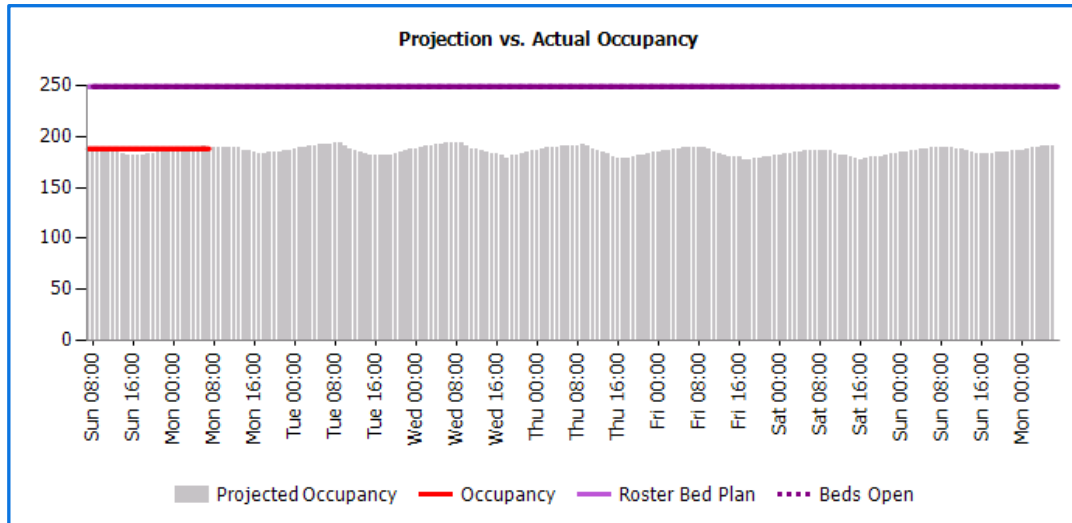
WHY DOES MY ROSTER BED PLAN NOT MATCH HOW MANY BEDS I HAVE IN MY UNIT?

The Roster Bed Plan is the bed plan decided during Annual Planning and will closely align to the budget for each service, not necessarily matching the number of beds in an individual unit.

Other ways to record bed numbers in CP are maximum capacity for each unit (total number of physical beds) and the number of beds that are 'open' (staffed and can take a patient).

WHAT HAPPENS WHEN THE WORM (ACTUAL CENSUS) HAS FLAT-LINED?

When the 'worm' (red occupancy or Actual Census line) has gone completely flat, this means that there is an issue with CP.



This is most likely because there has been no new data to update the data warehouse and can be caused by one of the following:

- The HL7 feed has stopped (HL7 integration)
- There was a data error during the importing process
- Discuss with your helpdesk (as this may have already been logged or they will already be aware of the situation).

Helpdesk will email Once internal processes have been checked, the Helpdesk will contact and provide detailed information to the HealthStream team to get this resolved as quickly as possible.

HOW DOES CP CALCULATE THE PROJECTIONS IN THE DASHBOARDS?

CP has been loaded with up to 4 years' worth of historical data from your Registration or ADT System which (using analytics in the background) can determine trends for day of the week, time of the year, and public holidays etc.

The previous 12 weeks of activity (admission, transfers, and discharges) in particular are used to calculate the projections for the next 7 days.

WHY DOES MY PROJECTIONS VS ACTUALS CHART ON TODAY DASHBOARDS HAVE A HUGE INCREASE OR DECREASE IN PROJECTIONS AT 7AM SOME DAYS?

This is due to the re-projection for the day. At 7.00am (or another time if configured differently), the projections recalibrate to match actual occupancy. If the actual occupancy on the previous day did not follow the projections for the day (i.e. more admissions, not enough discharges, etc.) the projections readjust to account for this as it will impact the next 7 days occupancy.

This will be evident in the yesterday's dashboards and will display where the differences were in projected information vs actual information for the day.

WHY DO MY ADMISSIONS NOT MATCH THE ADMISSIONS I HAVE FROM MY PATIENT MANAGEMENT OR ADT SYSTEM FOR TODAY?

This can vary between hospitals and it does depend on how admissions are entered.

A common reason for this could be transfers to IP units from Emergency are shown as a transfer to the IP unit, not an admission; however, all occupancy is shown on the dashboards.

WHAT IS THE DIFFERENCE BETWEEN AN ADMISSION AND A PATIENT IN?

Each patient journey has only one admission, the first inpatient bed the patient is allocated to (e.g. ICU or medical unit). "Patients In" is a combination of admissions and transfers around the hospital (e.g. ICU to Inpatient or a medical unit to a surgical unit, etc.)

WHAT IS A PLANNING GROUP?

A Planning Group is a logical grouping of units and services (e.g., Oncology and General Medicine in medical units) that may share patients and/or staff.

To illustrate this, the Census Matrix below shows the Planning Groups and their units outlined in purple across the top. The appropriate Service Types for each of these groupings are also grouped and then attached to the Planning Groups. These are outlined in pink on the left.

Below is an example of how the Planning Groups (PG) are structured:

Census Matrix		Units under their Planning Groups														
Planning Group	Service Totals	Crit Care				Surgery				Medicine				Cardiac		
		CCUO (SHS)	ICCS (SHS)	ICMS (SHS)	5ESUR	5NSUR	5SSUR	5WSUR	3SMED	4EMED	4SMED	4WMED	2ECA	2NCA	2SCA	2WCA
Units		8	14	14	5	20	24	20	24	30	10	34	4	32	33	16
Beds Open		5	11	10	3	16	22	26	23	25	7	28	8	30	19	8
Census																
Surgery																
SHS Surgery / A Service	7						4	3								
SHS Surgery / Acute Care Surgery	29			2	1	2	11	13								
SHS Surgery / B Service	7						2	5								
SHS Surgery / Otolaryngology	3				1			2								
SHS Surgery / Plastic	2							2								
SHS Surgery / Urology	7							2								
SHS Surgery / Vascular	9				1		6	1								
Medicine																
SHS Internal Med / A Service	21			1												
SHS Internal Med / B Service	23			3												
SHS Internal Med / C Service	22			1												
SHS Internal Med / General	2			2												
SHS Internal Med / Nephrology Renal Hypertension	4															
SHS Internal Med / Non-Teaching Other	21															
SHS Internal Med / Oncology	2															
SHS Internal Med / Respiratory	1			1												
Cardiac																
SHS Cardiac Science / Cardiac Cath Lab	27			8												
SHS Cardiac Science / Cardiology B Service	1															
SHS Cardiac Science / Cardiology C Service	2															
SHS Cardiac Science / Crit Care Cardiology	8															
SHS Cardiac Science / Defibrillation	16			1												
SHS Cardiac Science / Electrophysiology	13			2												
SHS Cardiac Science / Pacemaker	6															
SHS Cardiac Science / Transplant	9		5													
Women's Health																
SHS Gynecology / General	14															
SHS Obstetrics / General	35															
Child Health																
SHS Pediatrics / Neonatology	25															
Mental Health																
SHS Psychiatry / Adult General	32															
Emergency																
SHS Emergency / General	43															

CP displays patients who are not currently located on a unit within their Planning Group (as outlined in orange in the screenshot above).

This identifies outliers and allows visibility around exactly where patients are. This assists with identifying patients that would benefit from moving them back to their home unit, thus increasing staff efficiency and patient safety.

Planning Groups have been set up as determined by your project team with executive input.

WHAT DO I DO IF CP AND THE REGISTRATION SYSTEM INFORMATION DON'T MATCH?

CP is driven from the patient data which has been entered into the Patient Management System. Sometimes mismatches can occur due to time lapses, and this will correct itself once the data has refreshed in the next cycle.

If the mismatches are occurring persistently and don't appear to be related to a time lapse issue, contact your helpdesk. If this needs to be escalated further, then the helpdesk will need to contact HealthStream with as much information as possible to help identify the cause of the problem.

HOW DO I FIND OUT WHICH PATIENTS THE DASHBOARD CENSUS NUMBERS ARE REFERRING TO?

The Statistics tab will provide a breakdown of the patients by unit. The encounter number and patient ID are on this tab and you can then use this to look up the patient in your Patient Management or ADT System.

CAN'T FIND YOUR ANSWER?

For all further queries, contact your Application Administrators or your Helpdesk.

Standard Data Definitions

ADMISSIONS

Number of patients admitted during the specified time frame. This does not include ED presentations but does include patients admitted from Emergency.

The first inpatient location of a journey is the admission, a journey can only have one admission. If patients are in Emergency at the time of their admission, the admission will be attributed to Emergency.

Also see Patients In. The true number of patient movements into a Planning Group is represented by:

Patients In = Admissions + External Transfers In (not those between units in the same Planning Group)

ADMISSION TYPES

An Admission Type defines the kind of admission applicable for a patient when arriving at a hospital.

These could include:

- Elective
- Acute Admission
- Emergency visit
- Trauma

Capacity Planner aggregates these types into Acute (those unplanned patients coming through Emergency) or Elective admissions (including scheduled surgery patients and direct admits) only. Since CP only includes inpatient and Emergency areas, Admission Types for Outpatients and Observation Patients are excluded.

ANNUAL FORECAST

This is typically set once a year to work out the budget requirements - the annual settings will then fall through as default settings for the roster bed plan.

AVERAGE LENGTH OF STAY (ALOS)

Total length of stay from admission (date/time) to current date/time divided by the number of patients in the selected group.

ALOS is usually measured in days.

The ALOS can vary hugely when long-stay patients are discharged in the specific time frame (e.g. a 300-day patient was discharged last week - this will increase the ALOS for that week significantly).

When managing the hospital in the short term, ALOS reporting could lead to flawed decisions, e.g. when hospital is in gridlock it would be better to discharge 4 short-stay patients than 1 long-stay patient; the latter would bring i the current ALOS down significantly but only free up 1 bed.

BEDS OPEN

The number of beds available and staffed to take a patient.

Nursing managers or directors will have the best coordinated view of:

- Phased closure of beds per unit, in line with the unit schedules – e.g. for a specific unit closing 4 beds at a time (= 1 nurse)
- Services the individual unit can provide
- Opportunity to staff of closed units to work for other PG units.

Per unit, the staffing application will have a standard staffing ratio per number of beds open (e.g. for the AM shift, a nurse can look after 4 patients; so, if there are 28 beds open, 7 nurses for the AM shift are needed).

BEDS SET

Beds Set defines the beds planned to be open for the selected units. These plans can be set at Annual, Roster and/or Operational level. The operational beds are similar to the beds managed in the 'Beds Open' section of the application.

DASHBOARDS

Dashboards provide a snapshot of the current hospital status.

DASHBOARD EDITOR

The Dashboard Editor is a graphical editor where you design your dashboard. The design surface allows you to drag and drop, resize, and reposition your dashboard items depending on your audience.

You must have the appropriate access levels to open the Dashboard Editor.

DISCHARGES

Number of patients discharged from the hospital during the specified time frame. This includes discharges to another healthcare facility in the same region.

EXTERNAL TRANSFERS IN/OUT

The number of patients who have moved in to/out of a Planning Group to/from another Planning Group during the time period.

FORECAST

Forecasts are long-range planning and include a combination of the acute demand, plus the anticipated future elective volume. The acute forecasts use algorithms which are based on historic patterns, growth values, and changes in Length of Stay.

Elective volumes can be derived from a mix of budget, expected changes to scheduled surgical volumes and/or last year's actual census.

FORECAST TYPES

There are 3 forecast types used in CP which are:

1. Annual - this is where forecasts are created based on the set budget or funded beds for a defined period of time
2. Roster - this is where a forecast is created based on the required staffing needs for a defined period
3. Operational - this is where a forecast is created based on the day-to-day running of the hospital

HEALTHCARE FACILITY

A healthcare facility is a hospital. Hospital types may vary but they are all defined as a healthcare facility.

HEALTHCARE PROFESSIONALS

These are those who would be listed as "Attending" [physician] for any patient encounters in the healthcare facility. Other clinicians need not be included.

INTERNAL TRANSFERS IN/OUT

The number of patients who have moved between units in the same Planning Group during the time period.

LENGTH OF STAY (LOS)

This is defined as Discharge time & date minus admission time & date.

It is measured in days.

LENGTH OF STAY OF PATIENTS IN

This is defined as the length of stay of patients currently in the hospital.

MAXIMUM CAPACITY

The physical bed capacity of a unit.

OCCUPANCY [CENSUS]

Census is determined by the number of patients currently admitted to the hospital.

For Forecasting, Occupancy = Patients In * Patient Turn.

OUTLIER [OFF SERVICE]

Outliers (also known as Overflow or Off Service Patients) are classified as patients who are in a Planning Group unit that is of the same Unit Type but not of their own Planning Group. When patients are located in other (outlier) units, this often increases their Length of Stay.

PATIENT ACTIVITY

Patient events which trigger workload. This can include admissions, transfers, changes to attending physician or service type, and discharges or deaths.

PATIENT TURN

Patient Turn is calculated by taking the census over a specific time period and dividing it by the number of Patients In over the same time period.

Patient Turn provides the average time that it takes a patient to pass through a service or group of units.

- Census = 50 patients
- Patients In = 10 patients
- Patient Turn: $50 / 10 = 5$ days

PATIENTS IN

Patients In = Admissions + External Transfers In

For Forecasting, this represents the true patient demand for a Service.

PATIENTS OUT

Patients Out = Discharges + External Transfers Out.

PLANNED BEDS

This is the number of beds allocated to the Planning Group in the bed plan. This value can exceed the unit capacity of the PG (displayed in the column header), since it is purely a service-based plan and some of the patients may be placed outside of the units in the Planning Group. If the Planned Beds exceed the PG's capacity, then other PGs' units must be opened (using the "Set Beds by Unit" screen) to accommodate the excess.

PLANNING

This consists of four key planning levels:

STRATEGIC PLANNING

- Projects focused on long-term scenario planning (e.g. determining bed requirements and taking into account growth impacts of demographics, primary care initiatives, technical enhancements, etc.)
- One-off projects, looking 3-5 years forward

ANNUAL PLANNING

- Annual planning process, commencing 3-8 months before the new budget year
- Agree on total budget, assumptions around ALOS and growth figures, and determine base resources funded per unit or service

OPERATIONAL PLANNING - ONGOING

- Refine Annual forecast with trends (growth/ALOS), staff planning, refine special event planning (including public holidays and community support, etc.), high-level elective planning, and finalizing annual leave plans
- Looking 3-8 weeks forward

REAL-TIME MANAGEMENT

- Daily (2-3 times daily) review of current state and projections, combining current status and projections for the next few shifts
- Allocation of float pool staff, agency staff, granting spot leaves, finalizing elective plans, etc.

PLANNING GROUP

A Planning Group is a logical grouping of units and services that may share patients and/or staffing. They are used to project workload and plan resources.

RESOURCE PLANNING LEVEL

This defines the level at which the resources are required:

ANNUAL PLAN

Typically set once a year to work out the budget requirements - the budget settings will then fall through as default settings for the roster plan.

ROSTER PLAN

Updates staffing requirements in line with the staff scheduling cycle (e.g. 4 weekly - 8 weeks in advance). If the actual census is diverging from the Annual forecast, analyze what is driving this (number of patients or ALOS and for which services?) and subsequently understand if this trend is expected to continue or will it be curbed with clinical management. If the forecast is adjusted, this will flow through on the bed requirements, bed plans are updated accordingly for the staff scheduling [roster] period.

OPERATIONAL PLAN

We recommend reviewing the forecast for the next 1-4 weeks on a weekly basis. Based on the latest trends, if the actual census is likely to deviate from the roster forecast, you can adjust the resource requirements accordingly and run a gap analysis between staff required and staff scheduled. Even though schedules will already have been set, this will allow the nursing managers to review their options (e.g. swap study leave, allocate additional leave, book casual staff, cancel electives, etc.).

The default operational forecast and resource plans will fall through from the roster plans (so you can adjust from here if required).

PROJECTIONS

Predicted hourly occupancy for the next 1 – 6 days derived from the previous 12 weeks of activity for that day of the week.

SERVICES OR SPECIALTIES

Services or Specialties refer to the particular areas of hospital care.

These can include:

- Neurology
- Mental Health
- Oncology
- Emergency
- Surgery

SERVICE OR SPECIALTY GROUPS

Service groups provide CP with the ability to group services together and mirror their organizational structure. Service Groups allow users to select multiple services (of the group) at one time when generating reports.

For example, a Service Group maybe Medicine, and within that group will sit various services such as:

- Internal Medicine
- Oncology
- Respiratory Medicine

STAFFED PATIENT CAPACITY

This variable is unit related – describing how many patients a unit can accommodate at a specific time. Medium to long-term, this is driven by the forecast. Short-term, this can be adjusted to reflect the current patient or staff mix.

ROLE TYPES

The roles within CP define the roles of the individuals within the healthcare facility.

These can include:

- Nurses
- Doctors
- Technicians
- Clerks
- Administrators

UNIT TYPE

A Unit Type is a way of grouping different types of units and Planning Groups within a healthcare facility. This makes it easier to identify the off-service patients on some of the reports (like the Hospital Status Report). It will also help with Forecasting, since by separating out Critical Care units, the Medicine patients within Critical Care will be planned for separately from those in general Medicine units. Here are some example Unit Types:

- Inpatient
- Emergency
- Critical Care

UNITS

All locations within the hospital are listed under 'Units', including the Inpatient or Emergency Department units. Generally, outpatient and procedural areas are not included within Capacity Planner.