

This Quick Reference Guide (QRG) reviews how to complete Ad Hoc Requests in Capacity Management.

Common Buttons & Icons

	Transport icon
	Ellipses icon
	Expand icon
	Broom icon
	Job drop-down arrow (Menu icon)

Request an Adhoc Transport

➤ From the Bed Board gadget:

STEP 1: Click the bed cell for the patient you wish to transport.

STEP 2: Click the **Transport** icon.

STEP 3: Click **Request Adhoc Transport** . A Create Adhoc Patient Transport Request window displays.

STEP 4: Click the To **Ellipses** icon. A Location Selection window displays.

STEP 5: Use the **Expand** icons to drill-down and select the appropriate location.

NOTE: You can also select a location from the **Recent Searches** tab or use the **Location** field to search for a location.

STEP 6: Click **OK**. You return to the Create Adhoc Patient Transport Request window.

NOTE: Notify the bed manager or nursing manager to change the request priority, if the patient's transport request is urgent. Do not do so in this window.

STEP 7: Use the **Up** and **Down Arrows** to request additional transporters, if needed.

STEP 8: Click the Mode of Transport drop-down arrow; then select the appropriate option.

STEP 9: Select the appropriate **Patient Attribute** checkboxes, if needed.

STEP 10: Enter any pertinent details for transporters in the **Transport Details** field, if needed.

STEP 11: Select the appropriate **Transport Details** checkboxes, if needed.

STEP 12: Click **OK**.

NOTE: You can view the transport request on the **Transport List** gadget.

Request an Adhoc Clean

➤ From the Custodial Services List gadget:

STEP 1: Click the **Broom** icon.

STEP 2: Click **Request Adhoc Clean** . A Create Adhoc Custodial Services Request window displays.

STEP 3: Click the Location **Ellipses** icon. A Location Selection window displays.

STEP 4: Use the **Expand** icons to drill-down and select the appropriate location.

NOTE: You can also select a location from the **Recent Searches** tab or use the **Location** field to search for a location.

STEP 5: Click **OK**. You return to the Create Adhoc Custodial Services Request window.

NOTE: Notify the bed manager or nursing manager to change the request priority, if the request is urgent. Do not do so in this window.

STEP 6: Use the **Up and Down Arrows** to request additional custodians, if warranted.

STEP 7: Enter the details for the job in the **Adhoc Job Details** field.

STEP 8: Click **OK**

NOTE: You can view the cleaning request on the **Custodial Services List** gadget.

Cancel an Adhoc Clean

➤ From the Custodial Services List gadget:

STEP 1: Hover over the row for the job you wish to cancel.

STEP 2: Click the Job drop-down arrow (also known as the **Menu** icon); then click Clean.

STEP 3: Click **Cancel Clean** . A Cleaning Cancel Reason window displays.

STEP 4: Select a reason for cancellation.

STEP 5: Click **OK**.

NOTE: The cleaning request falls off the **Custodial Services List** gadget.