







This Quick Reference Guide (QRG) reviews how to Complete OB Tasks in Capacity Management

Common Buttons & Icons

	Available Bed icon
	Occupied/Male Bed icon
	Occupied/Female Bed icon
	Transfer icon
	Menu icon
	Global Search button

Transfer a Mother

Request a Patient Transfer

➤ From the Bed Board gadget:

- STEP 1:** Click the bed cell for the patient you wish to transport.
- STEP 2:** Click the **Transfer** icon.
- STEP 3:** Click **Transfer Patient** . A Transfer Patient window displays.
- STEP 4:** Click the **Mode of Transport** drop-down arrow; then select the appropriate option.
- STEP 5:** Select the appropriate **Patient Attribute** checkboxes, if needed.
- STEP 6:** Enter any pertinent details for transporters in the **Transport Details** field, if needed.
- STEP 7:** Select the appropriate **Transport Details** checkboxes, if needed.
- STEP 8:** Click **OK**.

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

Add a Comment to a Transfer Request

➤ From the Transfer List gadget:

- STEP 1:** Within the appropriate row on the Transfer List, click the **Comment** field.
- STEP 2:** Type the appropriate comment; then press **[Enter]**.

From the Office of Clinical Informatics

CAP – Complete OB Tasks

March 1, 2022

Page 2 of 3

Reserve a Bed for a Patient

➤ From the Transfer List and Bed Board gadgets:

STEP 1: Within the Bed Board gadget, scroll right or left to locate the appropriate unit.

STEP 2: Within the appropriate unit on the Bed Board gadget, scroll down or up to locate an available bed.

STEP 3: Click-and-drag the patient's name from the Transfer List down to the cell for the bed you want to reserve. An Assign window displays.

STEP 4: Review and confirm the patient details and mode of transportation; then click **OK**.

NOTE: You can use the **Patient will return to current location? check box** to hold the patient's current bed, if they will return to that bed after their initial transfer.

The assigned bed displays with hash marks to indicate that it is reserved.

You can confirm that the correct patient reserved the bed by double-clicking the bed cell and viewing the **Reserved Patient** tab.

Complete a Transfer

➤ From the Transfer List gadget:

STEP 1: Hover over the appropriate row in the Transfer List.

STEP 2: Click the **Menu** icon to the left of the patient's name.

STEP 3: Click **Transfer** in the drop-down menu.

STEP 4: Click **Complete Transfer** in the sub-menu.

NOTE: When a transfer is complete, the patient falls off the Transfer List and displays in their new bed.

Verify a Newborn Encounter

➤ From the Patient List gadget:

STEP 1: Click **Global Search**. A Global Search Patient Parameters window displays.

STEP 2: Enter the newborn's name, medical record number, and/or financial identification number in the appropriate field.

STEP 3: Click **Search**.

STEP 4: Hover over the newborn's **Current Location** cell to view to where the newborn was registered.

STEP 5: Click the **Bed Board** tab.

STEP 6: Within the Bed Board gadget, scroll right or left to locate the appropriate unit.

STEP 7: Within the appropriate unit on the Bed Board gadget, scroll down or up to locate the appropriate bed.

STEP 8: Click the bed cell to which the newborn was listed as registered.

STEP 9: Verify that the correct newborn's information displays.