CREDIBLE
Behavioral Health Software

Facility Whiteboard

Contents

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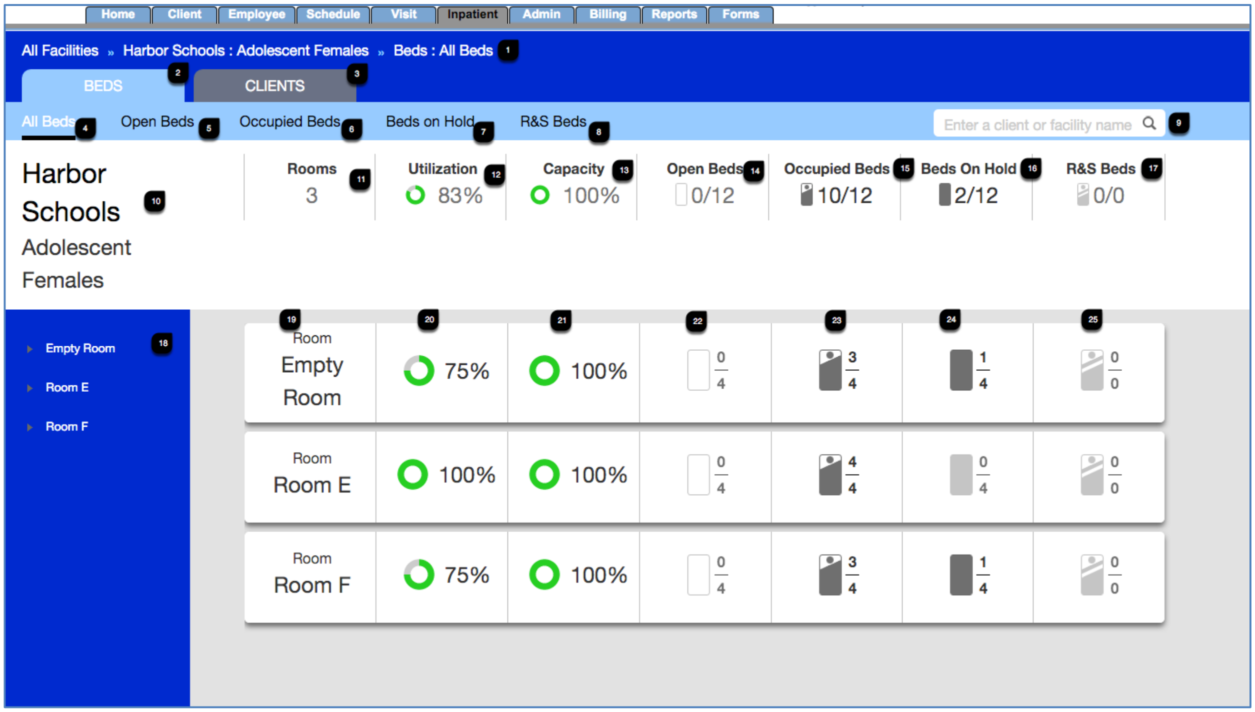
Landing Page Anatomy

1. **Facility Search**: When the user enters the name of a facility in this **Search As You Type** (SAYT) field, the facilities displayed in the facility category will be limited to those facilities whose names contain the entered characters.
2. **Totals Compression Icon:** When this icon is clicked, the **Totals** category will be hidden. If the **Totals** category is hidden, then the **compression icon** will change to an **expansion icon.** When the **expansion icon** is clicked, the **Totals** category will be displayed.
3. **Total Room:** This displays the total number of rooms in all facilities within the system.
4. **Utilization:** This displays the total utilization for all facilities within your Domain. This is calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
5. **Capacity:** This displays the total capacity for all facilities within your Domain. This is calculated as: ((total number of OCCUPIED beds + total number of ON HOLD beds) / total number of beds) * 100, rounded to the nearest whole percent.
6. **Open Beds:** This displays the total number of OPEN beds over the total number of beds in all facilities within your Domain.
7. **Occupied Beds:** This displays the total number of OCCUPIED beds over the total number of beds in all facilities within your Domain.
8. **Beds On Hold:** This displays the total number of ON HOLD beds over the total number of beds in all facilities within your Domain.
9. **R&S Beds:** This displays the total number of OCCUPIED R&S beds (over the total number of R&S beds), in all facilities, within the domain.
10. **Facility:** This column displays the name of the facility.
11. **Rooms:** This column displays the total number of rooms within the facility.

12. **Utilization:** This displays the total utilization for the facility. The calculation used to identify this percentage is: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
13. **Capacity:** This displays the total capacity of the facility. The calculation used to identify this percentage is: ((total number of OCCUPIED beds + total number of ON HOLD beds) / total number of beds) * 100, rounded to the nearest whole percent.
14. **Open Beds:** This displays the total number of OPEN beds over the total number of beds within the facility.
15. **Occupied Beds:** This displays the total number of OCCUPIED beds over the total number of beds within the facility.
16. **Beds On Hold:** This displays the total number of ON HOLD beds over the total number of beds within the facility.
17. **R&S Beds:** This displays the total number of OCCUPIED R&S beds over the total number of R&S beds within the facility.
18. **Wing Expansion Icon:** This icon will only be present in if the facility has designated wings. When this icon is clicked, the facility line will expand vertically. The same calculations will be displayed, but now at the wing level. In addition to displaying the wing level data, clicking this icon will replace it with the **Wing Compression Icon**. Clicking this icon will hide the wing data.

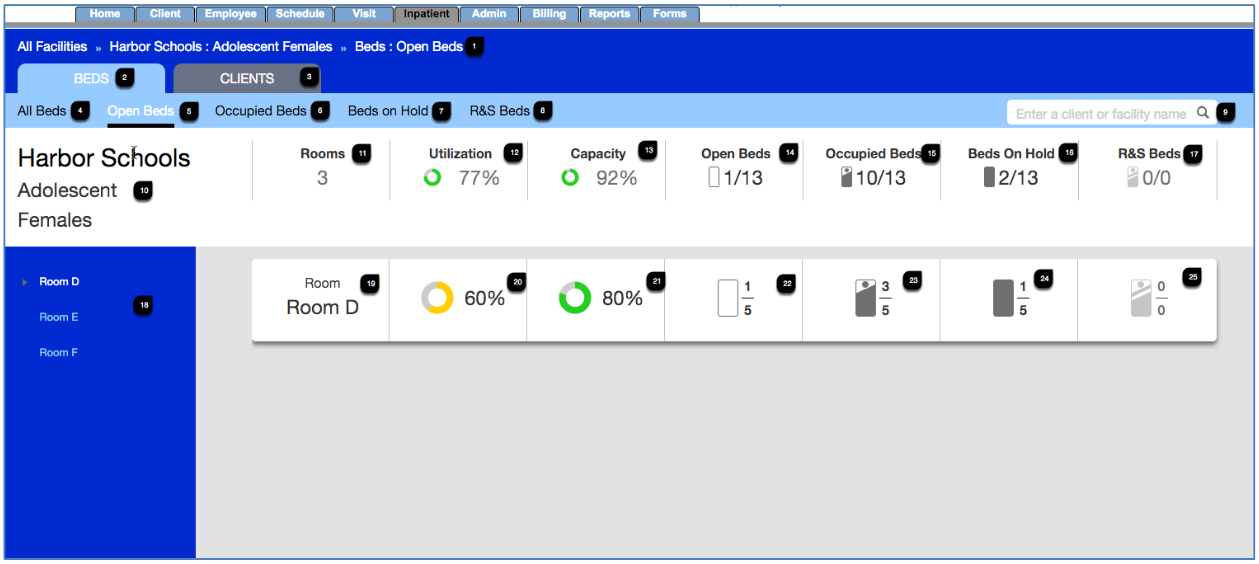
BEDS > All Beds Page Anatomy



1. **Navigation Breadcrumbs:** This path displays the steps the user followed to get to the current page, allowing them to retrace their steps.
2. **BEDS:** This tab allows the user to view Bed Board-related information and engage in Bed Board workflows.
3. **CLIENTS:** This tab allows the user to view client-related information and engage in client workflows.
4. **All Beds:** When this link is clicked, the user is taken to the **CLIENTS > All Clients** page.
5. **Open Beds:** This link takes the user to the **CLIENTS > Open Beds** page.
6. **Occupied Beds:** After clicking this link, the user is directed to the **CLIENTS > Occupied Beds** page.
7. **Beds on Hold:** When this link is clicked, the user is taken to the **CLIENTS > Beds On Hold** page.
8. **R&S Beds:** On clicking this link is clicked, the user goes to the **CLIENTS > R&S Beds** page.
9. **Client Search:** When a user begins entering characters into this SAYT field, a dropdown displays clients whose name (or ID) contains the characters entered. When the user clicks one of the clients displayed, they are brought to the client's overview page. Note: This search functionality is present on **every** page within the Facility Whiteboard.
10. **Facility/Wing:** This label displays the name of the facility or wing that currently being viewed.
11. **Room (Facility/Wing Census Bar):** This column indicates the total number of beds within the Facility/Wing.
12. **Utilization (Facility/Wing Census Bar):** This column displays the total Utilization for the Facility or Wing. This is calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.

13. **Capacity (Facility/Wing Census Bar):** This column indicated the total Capacity of the Facility/Wing. This is calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
14. **Open Beds (Facility/Wing Census Bar):** This displays the total number of OPEN beds over the total number of beds within the facility/wing.
15. **Occupied Beds (Facility/Wing Census Bar):** This shows the total number of OCCUPIED beds over the total number of beds within the facility/wing.
16. **Beds On Hold (Facility/Wing Census Bar):** This indicates the total number of ON HOLD beds over the total number of beds within the facility/wing.
17. **R&S Beds (Facility/Wing Census Bar):** This displays the total number of OCCUPIED R&S beds over the total number of R&S beds within the facility/wing.
18. **Room Navbar:** This navigation bar displays the name of every room in facility/wing. When the room name is clicked, the user will be navigated to the **Room Drill Down page**.
19. **Room:** This column displays the Room's name.
20. **Utilization:** This column shows the total Utilization for the room, calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
21. **Capacity:** This column indicates the total Capacity for the room. The calculation used to identify this percentage is: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
22. **Open Beds:** This displays the total number of OPEN beds over the total number of beds within the room.
23. **Occupied Beds:** This shows the total number of OCCUPIED beds over the total number of beds within the room.
24. **Beds On Hold:** This indicates the total number of ON HOLD beds over the total number of beds within the room.
25. **R&S Beds:** This displays the total number of OCCUPIED R&S beds over the total number of R&S beds within the room.

BEDS > Open Beds Page Anatomy



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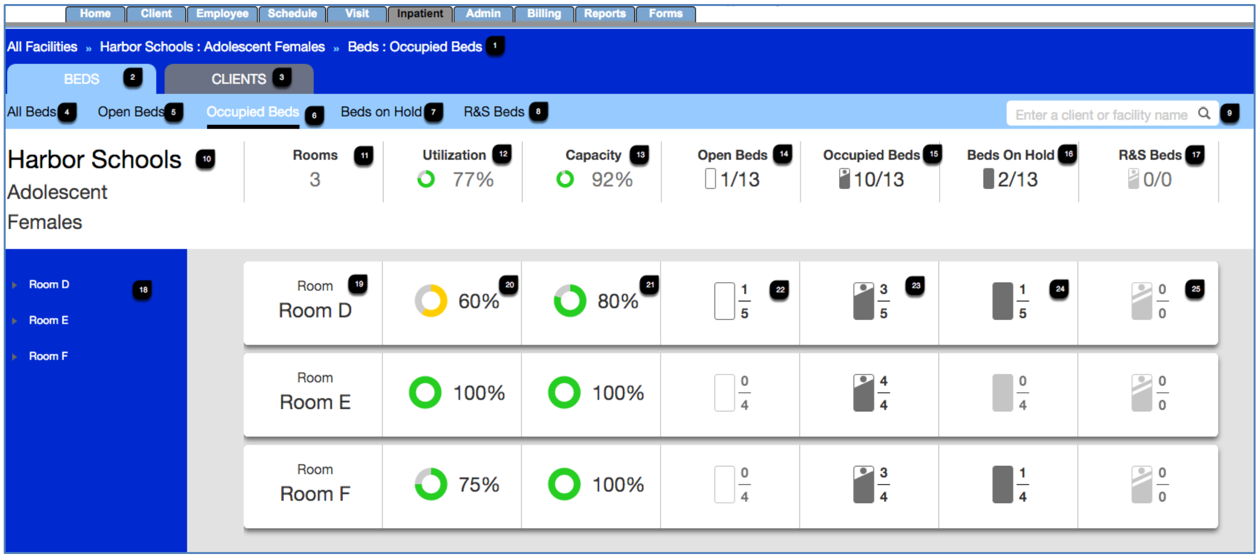
4. **All Beds:** When this link is clicked, the user is taken to the **CLIENTS > All Clients** page.
5. **Open Beds:** This link takes the user to the **CLIENTS > Open Beds** page.
6. **Occupied Beds:** After clicking this link, the user is directed to the **CLIENTS > Occupied Beds** page.
7. **Beds on Hold:** When this link is clicked, the user is taken to the **CLIENTS > Beds On Hold** page.
8. **R&S Beds:** On clicking this link is clicked, the user goes to the **CLIENTS > R&S Beds** page.
9. **Client Search:** When a user begins entering characters into this SAYT field, a dropdown displays clients whose name (or ID) contains the characters entered. When the user clicks one of the clients displayed, they are brought to the client's overview page. Note: This search functionality is present on **every** page within the Facility Whiteboard.
10. **Facility/Wing:** This label displays the name of the facility or wing that currently being viewed.
11. **Room (Facility/Wing Census Bar):** This column indicates the total number of beds within the Facility/Wing.
12. **Utilization (Facility/Wing Census Bar):** This column displays the total Utilization for the Facility or Wing. This is calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
13. **Capacity (Facility/Wing Census Bar):** This column indicated the total Capacity of the Facility/Wing. This is calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
14. **Open Beds (Facility/Wing Census Bar):** This displays the total number of OPEN beds over the total number of beds within the facility/wing.

15. **Occupied Beds (Facility/Wing Census Bar):** This shows the total number of OCCUPIED beds over the total number of beds within the facility/wing.
16. **Beds On Hold (Facility/Wing Census Bar):** This indicates the total number of ON HOLD beds over the total number of beds within the facility/wing.
17. **R&S Beds (Facility/Wing Census Bar):** This displays the total number of OCCUPIED R&S beds over the total number of R&S beds within the facility/wing.
18. **Room Navbar:** This navigation bar displays the name of every room in facility/wing. When the room name is clicked, the user will be navigated to the **Room Drill Down page**.
19. **Room:** This column displays the name of the Room.
20. **Utilization:** This column displays the total Utilization for the room. The calculation used to identify this percentage is: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
21. **Capacity:** This column shows the total Capacity for the room, calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
22. **Open Beds:** This indicates the total number of OPEN beds over the total number of beds within the room.
23. **Occupied Beds:** This displays the total number of OCCUPIED beds over the total number of beds within the room.
24. **Beds On Hold:** This shows the total number of ON HOLD beds over the total number of beds within the room.
25. **R&S Beds**: This indicates the total number of OCCUPIED R&S beds over the total number of R&S beds within the room.

BEDS > Occupied Beds Page Anatomy



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4. **All Beds:** When this link is clicked, the user is taken to the **CLIENTS > All Clients** page.
5. **Open Beds:** This link takes the user to the **CLIENTS > Open Beds** page.
6. **Occupied Beds:** After clicking this link, the user is directed to the **CLIENTS > Occupied Beds** page.
7. **Beds on Hold:** When this link is clicked, the user is taken to the **CLIENTS > Beds On Hold** page.
8. **R&S Beds:** On clicking this link is clicked, the user goes to the **CLIENTS > R&S Beds** page.
9. **Client Search:** When a user begins entering characters into this SAYT field, a dropdown displays clients whose name (or ID) contains the characters entered. When the user clicks one of the clients displayed, they are brought to the client's overview page. Note: This search functionality is present on **every** page within the Facility Whiteboard.
10. **Facility/Wing:** This label displays the name of the facility or wing that currently being viewed.
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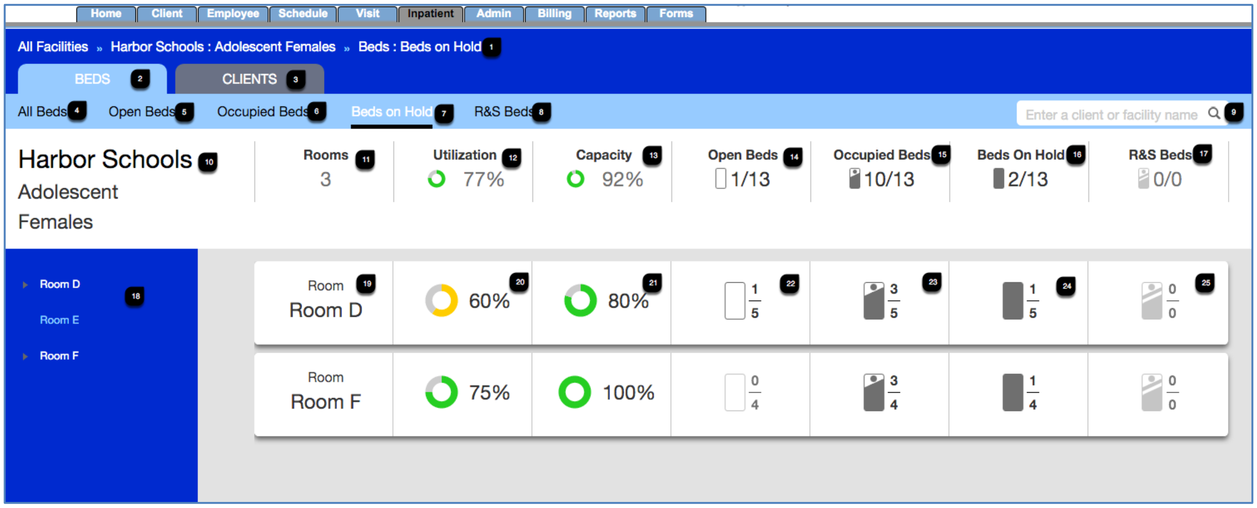
12. **Utilization (Facility/Wing Census Bar):** This column displays the total Utilization for the Facility or Wing. This is calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
13. **Capacity (Facility/Wing Census Bar):** This column indicated the total Capacity of the Facility/Wing. This is calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
14. **Open Beds (Facility/Wing Census Bar):** This displays the total number of OPEN beds over the total number of beds within the facility/wing.
15. **Occupied Beds (Facility/Wing Census Bar):** This shows the total number of OCCUPIED beds over the total number of beds within the facility/wing.

16. **Beds On Hold (Facility/Wing Census Bar):** This indicates the total number of ON HOLD beds over the total number of beds within the facility/wing.
17. **R&S Beds (Facility/Wing Census Bar):** This displays the total number of OCCUPIED R&S beds over the total number of R&S beds within the facility/wing.
18. **Room Navbar:** This navigation bar displays the name of every room in facility/wing. When the room name is clicked, the user will be navigated to the **Room Drill Down page**.
19. **Room:** This column displays the name of the Room.
20. **Utilization:** This column displays the total Utilization for the room, calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
21. **Capacity:** This column displays the total Capacity for the room. The calculation used to identify this percentage is: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
22. **Open Beds:** This displays the total number of OPEN beds over the total number of beds in the room.
23. **Occupied Beds:** This shows the total number of OCCUPIED beds over the total number of beds within the room.
24. **Beds On Hold:** This indicates the total number of ON HOLD beds over the total number of beds within the room.
25. **R&S Beds:** This displays the total number of OCCUPIED R&S beds over the total number of R&S beds within the room.

BEDS > Beds On Hold Page Anatomy



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5. **Open Beds:** This link takes the user to the **CLIENTS > Open Beds** page.
6. **Occupied Beds:** After clicking this link, the user is directed to the **CLIENTS > Occupied Beds** page.
7. **Beds on Hold:** When this link is clicked, the user is taken to the **CLIENTS > Beds On Hold** page.
8. **R&S Beds:** On clicking this link is clicked, the user goes to the **CLIENTS > R&S Beds** page.
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14. **Open Beds (Facility/Wing Census Bar):** This displays the total number of OPEN beds over the total number of beds within the facility/wing.

15. **Occupied Beds (Facility/Wing Census Bar):** This shows the total number of OCCUPIED beds over the total number of beds within the facility/wing.
16. **Beds On Hold (Facility/Wing Census Bar):** This indicates the total number of ON HOLD beds over the total number of beds within the facility/wing.
17. **R&S Beds (Facility/Wing Census Bar):** This displays the total number of OCCUPIED R&S beds over the total number of R&S beds within the facility/wing.
18. **Room Navbar:** This navigation bar displays the name of every room in facility/wing. When the room name is clicked, the user will be navigated to the **Room Drill Down page**.
19. **Room:** This column displays the name of the Room.
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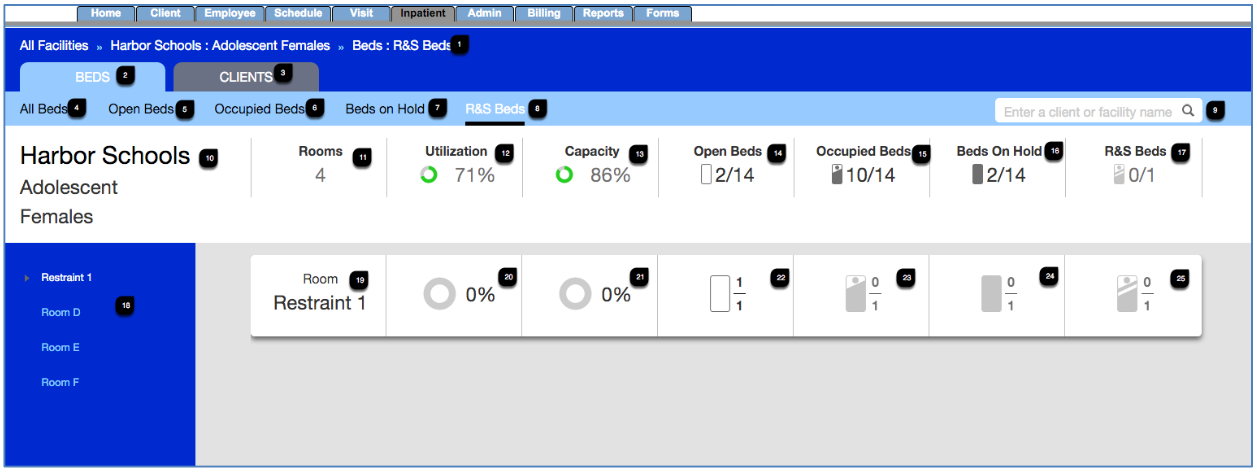
24. **Beds On Hold:** This indicates the total number of ON HOLD beds over the total number of beds within the room.
25. **R&S Beds:** This displays the total number of OCCUPIED R&S beds over the total number of R&S beds within the room.

BEDS > R&S Beds Page Anatomy



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5. **Open Beds:** This link takes the user to the **CLIENTS > Open Beds** page.
6. **Occupied Beds:** After clicking this link, the user is directed to the **CLIENTS > Occupied Beds** page.
7. **Beds on Hold:** When this link is clicked, the user is taken to the **CLIENTS > Beds On Hold** page.
8. **R&S Beds:** On clicking this link is clicked, the user goes to the **CLIENTS > R&S Beds** page.
9. **Client Search:** When a user begins entering characters into this SAYT field, a dropdown displays clients whose name (or ID) contains the characters entered. When the user clicks one of the clients displayed, they are brought to the client's overview page. Note: This search functionality is present on **every** page within the Facility Whiteboard.
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14. **Open Beds (Facility/Wing Census Bar):** This displays the total number of OPEN beds over the total number of beds within the facility/wing.
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16. **Beds On Hold (Facility/Wing Census Bar):** This indicates the total number of ON HOLD beds over the total number of beds within the facility/wing.

17. **R&S Beds (Facility/Wing Census Bar):** This displays the total number of OCCUPIED R&S beds over the total number of R&S beds within the facility/wing.
18. **Room Navbar:** This navigation bar displays the name of every room in facility/wing. When the room name is clicked, the user will be navigated to the **Room Drill Down page**.
19. **Room:** This column displays the name of the Room.
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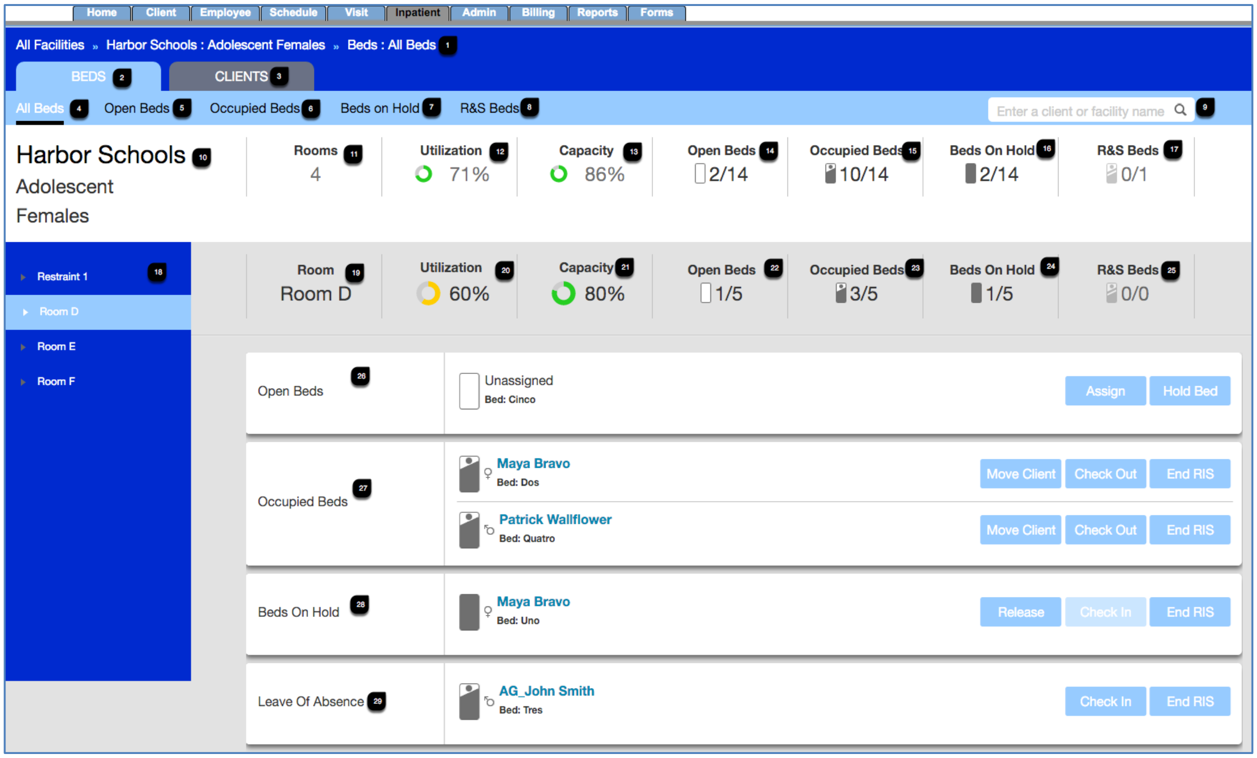
BEDS > Room Drill Down Page Anatomy



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5. **Open Beds:** This link takes the user to the **CLIENTS > Open Beds** page.
6. **Occupied Beds:** After clicking this link, the user is directed to the **CLIENTS > Occupied Beds** page.
7. **Beds on Hold:** When this link is clicked, the user is taken to the **CLIENTS > Beds On Hold** page.
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23. **Occupied Beds:** This shows the total number of OCCUPIED beds over the total number of beds within the room.
24. **Beds On Hold:** This indicates the total number of ON HOLD beds over the total number of beds within the room.
25. **R&S Beds:** This displays the total number of OCCUPIED R&S beds over the total number of R&S beds within the room.
26. **Open Beds Row:** This row displays all open beds in the room. Each bed displayed has **Assign** and **Hold Bed** action buttons. Please note: to see these buttons, the user's Profile Code must have *Security Matrix: ClientBedBoardAssign* checked.
27. **Occupied Beds Row:** This row shows all occupied beds in the room. Each bed displayed has **Move Client**, **Check Out**, and **End RIS** buttons. Please note: to see the *Move Client* and *Check Out* buttons, the user's Profile Code must have *Security Matrix: ClientBedBoardAssign* checked. To see the *End RIS* button, the user's Profile Code must have *Security Matrix: RISArchive* checked.
28. **Beds On Hold:** This row displays beds that are currently on hold for clients. Each bed displayed has **Release**, **Check In**, and **End RIS** buttons. Please note: to see the *Release* and *Check In* buttons, the user's Profile Code must have *Security Matrix: ClientBedBoardAssign* checked, while to see the *End RIS* button, the user's Profile Code must have *Security Matirx: RISArchive* checked. However, if the client is actively assigned to another bed, the *Check In* button will be disabled.
29. **Leave Of Absence:** This row shows beds for clients who are currently on a leave of absence. Each bed displayed has **Check In** and **End RIS** buttons. To see the *Check In* button, the user's Profile Code must have *Security Matrix: ClientBedBoardAssign* checked. To see the *End RIS* button, the user's Profile Code must have *Security Matrix: RISArchive* checked.

Bed Board Workflows

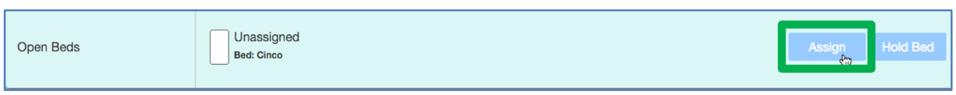
Assign Bed

Assign Bed	
Use	Assign a client to a bed
Required Security Matrix Rights	InpatientModule; ClientBedBoardAssign
Partner Configs	Use the Inpatient Module

Steps to Complete Workflow

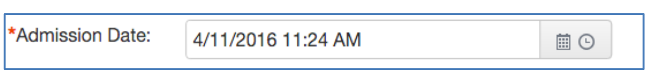
1. Navigate to Inpatient Tab.
2. Click the name of the desired facility.
    - Alternately, drill down to Wing, and click on the name of the desired Wing.
3. On the Room navbar, click on the desired room name.

4. Click the **Assign** button.

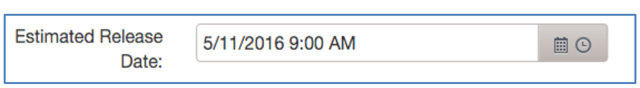


5. Select a client from the SAYT Client Field.

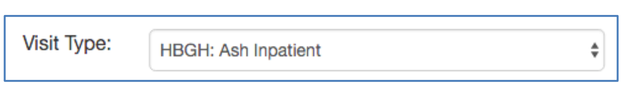
6. Modify the Admission Date, if need be. Please note that this defaults to the current date/time stamp.



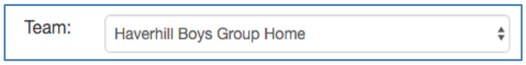
7. Enter an Estimated Release Date (optional).



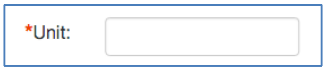
8. Select a Visit Type to associate with the Bed Board interval (optional).



9. Select a Team to associate with the Bed Board interval (optional).



10. Select a Flex Unit or Flex Rate (conditionally optional).



NOTE: The Flex Unit and Flex Rate fields are conditionally required, based off of the Flex Type specified in the selected Visit Type. If no Visit Type is selected, both the Flex Rate and Flex Units fields will be available for population; however, only one of the fields can be populated for the interval. In this scenario, neither the Flex Units nor Flex Rate fields are required. If the selected Visit Type has *Visit Type: Flex Type = Rate*, then only the Flex Rate field will be displayed; it will become a required field. If the selected Visit Type has *Visit Type: Flex Type = Unit*, then the only the Flex Unit field will be displayed; it will become a required field.

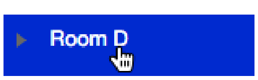
11. Click the **Assign Bed** button to complete the *Assign Bed* workflow. Should you decide not to assign the specific bed to the client, click the **Cancel** button. This will end the workflow.

Hold Bed

Hold Bed	
Use	Place a bed on hold for a client
Required Security Matrix Rights	InpatientModule; ClientBedBoardAssign
Partner Configs	Use the Inpatient Module

Steps to Complete Workflow

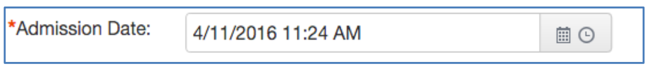
1. Navigate to Inpatient Tab.
2. Click the name of the desired facility.
    - Alternately, drill down to Wing, and click on the name of the desired Wing.
3. On the Room navbar, click on the desired room name.



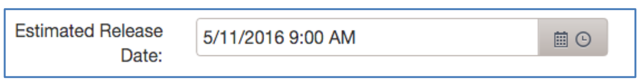
4. Click the **Hold Bed** button.

5. Select a client from the SAYT Client field.

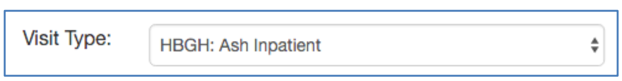
6. Modify the Admission Date, if need be. Please note that this defaults to the current date/time stamp.



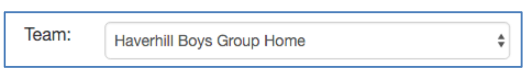
7. Enter an Estimated Release Date (optional).



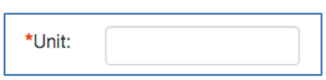
8. Select a Visit Type to associate with the Bed Board interval (optional).



9. Select a Team to associate with the Bed Board interval (optional).

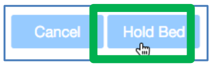


10. Select a Flex Unit or Flex Rate (conditionally optional).



NOTE: The Flex Unit and Flex Rate fields are conditionally required, based off of the Flex Type specified in the selected Visit Type. If no Visit Type is selected, both the Flex Rate and Flex Units fields will be available for population; however, only one of the fields can be populated for the interval. In this scenario, neither the Flex Units nor Flex Rate fields are required. If the selected Visit Type has *Visit Type: Flex Type = Rate*, then only the Flex Rate field will be displayed; it will become a required field. If the selected Visit Type has *Visit Type: Flex Type = Unit*, then the only the Flex Unit field will be displayed; it will become a required field.

11. Click the **Hold Bed** button to complete the *Hold Bed* workflow. If you decide not to assign the specific bed to the client, click the **Cancel** button; this will exit the workflow.



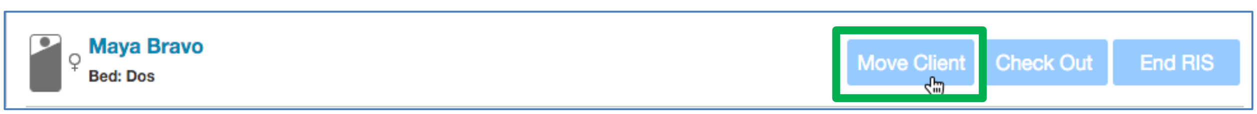
Move Client

Move Client	
Use	Move a client to another bed
Required Security Matrix Rights	InpatientModule; ClientBedBoardAssign
Partner Configs	Use the Inpatient Module

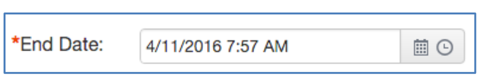
Steps to Complete Workflow

1. Navigate to Inpatient Tab.
2. Click the name of the desired facility.
   - Alternately, drill down to Wing, and click on the name of the desired Wing.
3. On the Room navbar, click on the desired room name.

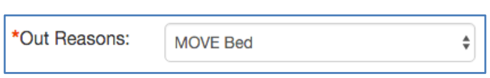
4. Click the **Move Client** button.



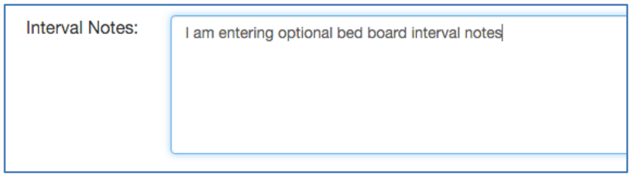
5. Update the End Date/Time if necessary. (Note that the End Date defaults to the current date/time stamp).



6. Select the desired Out Reason from the dropdown.

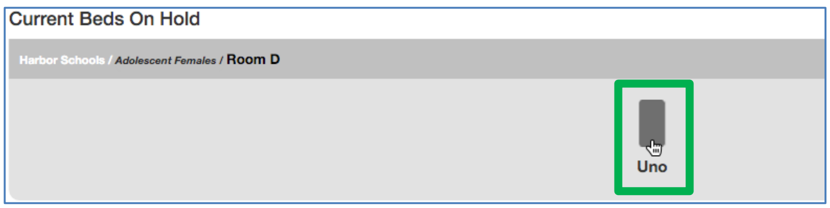


7. Enter Bed Board Interval Notes (optional).

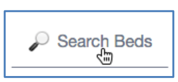


8. Click the **Continue** button to continue with the workflow. Alternately, if you decide not to complete the workflow, you can click the **Cancel** button.

9. If the client has a bed on hold, and you want to move the client to that bed, click on the specific bed.

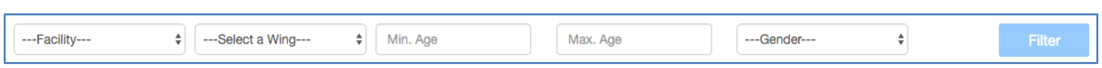


- Alternatively, if the client has a bed on hold, but you want to move the client to a different bed, click the **Search Beds** button.



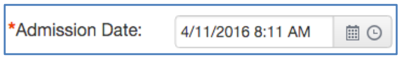
- If the client does not have a bed on hold, you will be navigated to the Bed Search card, just as you are when you click the **Search Beds** button.

10. Select the desired filter criteria, and then click the **Filter** button.

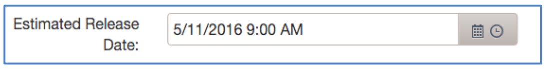


11. Click on the specific bed to select it.

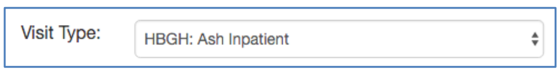
12. Update the Admission Date/Time stamp if needed. (Note: The Admission Date/Time stamp defaults to one minute later than the checkout time of the bed that the client was just checked out of.)



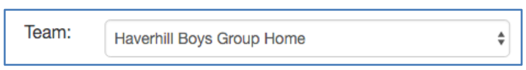
13. Enter an Estimated Release Date (optional).



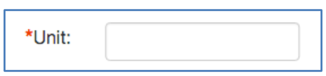
14. Select a Visit Type to associate with the Bed Board interval (optional).



15. Select a Team to associate with the Bed Board interval (optional).

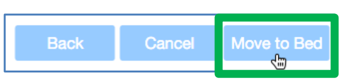


16. Select a Flex Unit or Flex Rate (conditionally optional).



NOTE: The Flex Unit and Flex Rate fields are conditionally required, based off of the Flex Type specified in the selected Visit Type. If no Visit Type is selected, both the Flex Rate and Flex Units fields will be available for population; however, only one of the fields can be populated for the interval. In this scenario, neither the Flex Units nor Flex Rate fields are required. If the selected Visit Type has *Visit Type: Flex Type = Rate*, then only the Flex Rate field will be displayed; it will become a required field. If the selected Visit Type has *Visit Type: Flex Type = Unit*, then the only the Flex Unit field will be displayed; it will become a required field.

17. Click the **Move to Bed** button to complete the *Move Client* workflow. Alternatively, if you decide that you want to move the client to a different bed, you can click the **Back** button. If you decide that you don't want to move the client at all, click the **Cancel** button, and you will exit the workflow.



Check Out

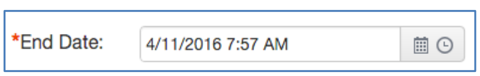
Check Out	
Use	Check client out of bed to either place on LOA days, or release the bed into the available pool.
Required Security Matrix Rights	InpatientModule; ClientBedBoardAssign
Partner Configs	Use the Inpatient Module

Steps to Complete Workflow

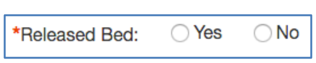
1. Navigate to Inpatient tab.
2. Click the name of the desired facility.
    - Alternately, drill down to Wing, and click on the name of the desired Wing.
3. On the Room navbar, click on the desired room name.

4. Click the **Check Out** button.

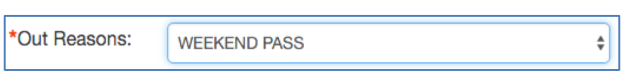
5. Update the End Date/Time if necessary. (Note that the End Date defaults to the current date/time stamp).



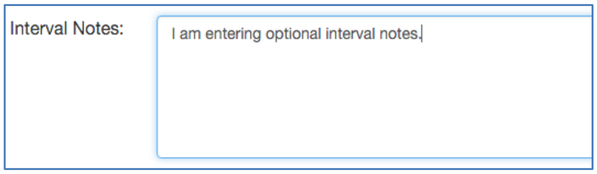
6. Select whether or not you want to release the bed. Please note: if you set **Released Bed** to *Yes* then the bed will be placed back into the pool of available beds, and the client will no longer be actively assigned to a bed. If you select *No* the client will be placed on LOA days.



7. Select the appropriate **Out Reason** from the list.



8. Enter interval notes (optional).



9. Click the **Check Out** button to check the client out of the bed. If you click the **Cancel** button, you will exit the workflow.

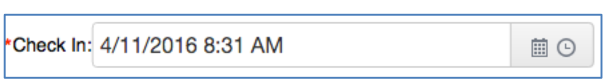
Check In

Check In	
Use	Check a client back into a bed when they are returning from LOA days, or check a client into a bed that is currently on hold for them (provided that the client isn't actively assigned to another bed).
Required Security Matrix Rights	InpatientModule; ClientBedBoardAssign
Partner Configs	Use the Inpatient Module

Steps to Complete Workflow

1. Navigate to Inpatient tab.
2. Click the name of the desired facility.
   - Alternately, drill down to Wing, and click on the name of the desired Wing.
3. On the Room navbar, click on the desired room name.

4. Click the **Check In** button.
5. Update the **Check In Date/Time** if needed (Note: the Check In date/time defaults to the current date/time.)



6. Click the **Check In** button. Clicking the **Cancel** button exits the workflow.

Release Bed

Release Bed	
Use	Release a bed that is currently on hold back into the pool of open beds.
Required Security Matrix Rights	InpatientModule; ClientBedBoardAssign
Partner Configs	Use the Inpatient Module

Steps to Complete Workflow

1. Navigate to Inpatient tab.
2. Click the name of the desired facility.
   - Alternately, drill down to Wing, and click on the name of the desired Wing.
3. On the Room navbar, click on the desired room name.

4. Click the **Release** button.

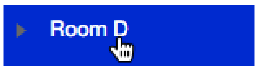
5. On the confirmation card, click the **Release** button to release the bed and complete the workflow. Should you decide that you do not want to release the bed, click the Cancel button to exit the workflow.

End RIS

End RIS	
Use	End / Archive the active residential / inpatient stay
Required Security Matrix Rights	InpatientModule; RISArchive
Partner Configs	Use the Inpatient Module

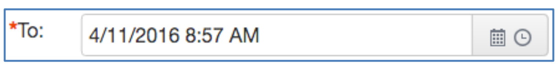
Steps to Complete Workflow

1. Navigate to Inpatient tab.
2. Click the name of the desired facility.
   - Alternately, drill down to Wing, and click on the name of the desired Wing.
3. On the Room navbar, click on the desired room name.

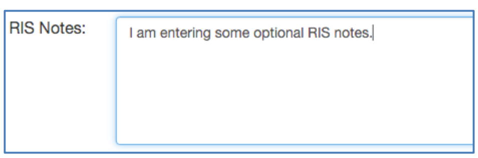


4. Click the **End RIS** button.

5. Update the **To** date/time stamp if necessary. (Note: The **To** date/time stamp defaults to the current date/time.)

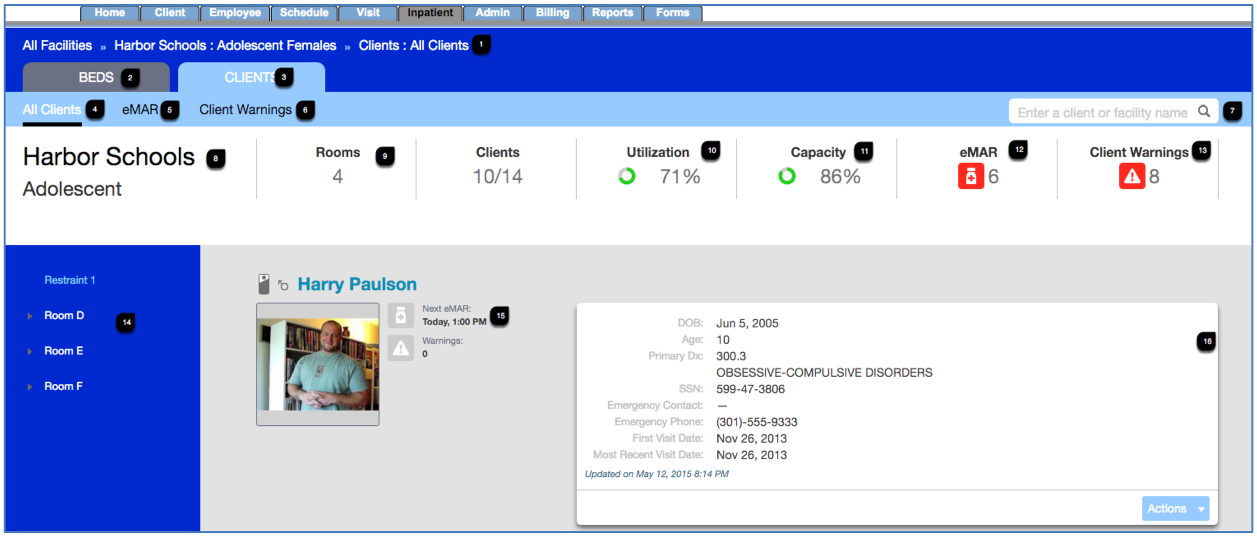


6. Enter **RIS Notes** (optional).



7. Click the **End RIS** button to complete the workflow. Alternatively, if you decide that you don't want to end or archive the client's RIS, you can click the **Cancel** button, exiting the workflow.

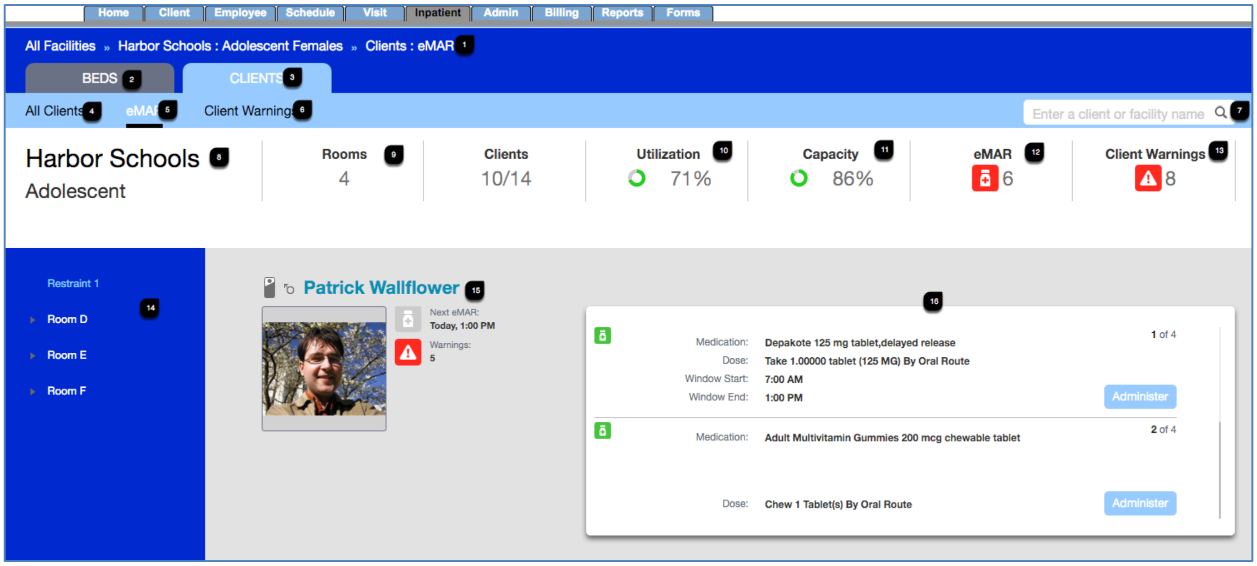
CLIENTS > All Clients Page Anatomy



1. **Navigation Breadcrumbs:** These breadcrumbs allow the user to traverse back through the path they took to arrive at the current page.
2. **BEDS Tab:** This allows the user to view Bed Board-related information and engage in Bed Board workflows.
3. **CLIENTS Tab:** This allows the user to view client-related information and engage in client workflows.
4. **All Clients:** When the user clicks on this link they are directed to the **All Clients** page.
5. **eMAR:** On clicking this link, the user is taken to the **eMAR** page.
6. **Client Warnings:** When this link is clicked the **Client Warnings** page is displayed.
7. **Client Search:** When a user starts to enter characters into this SAYT field, a dropdown appears which is populated by clients whose name (or ID) contains the characters entered. On clicking one of the clients displayed, they are brought to the client's overview page. (Note: this search functionality is present on *every* page within the Facility Whiteboard.)
8. **Facility/Wing:** This label displays the name of the facility/wing that the user is currently viewing.
9. **Rooms (Client Census Bar):** This column displays the number of rooms that are in the facility/wing.
10. **Utilization (Client Census Bar):** This column shows the total Utilization for the Facility/Wing. The calculation used to identify this percentage is: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
11. **Capacity (Client Census Bar):** This column indicates the total Capacity for the Facility/Wing. This is calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
12. **eMAR (Client Census Bar):** This column displays the number of medications that are currently able to be administered. The icon color — green, yellow, red — indicates the level of soonest-ending administration window. The color is updated based on the rule of thirds. For the first third of the eMAR Administration Window, the icon is green. In the middle third of the eMAR Administration window, the icon is yellow. For the final third of the eMAR Administration Window, the icon is red.
13. **Client Warnings:** This column shows the number of warnings that are present in the facility/wing. The color of the Client Warnings icon correlates to the most severe warning present in the wing/facility.

14. **Room Navbar:** This navbar displays a list of all rooms in the facility. Clicking on the room name will re-direct the user to that specific room's drill down page. When clicked, the expansion icon will display a list of all clients that are currently assigned to the room, or have beds in that room on hold. Clicking a client's name will bring the user to that client's overview page.
15. **Client Snapshot:** This category displays the type of bed and bed status of the client's current assignment, as well as their gender, name, photo (if available), next eMAR Administration, and the count of their warnings.
16. **Client Card:** The client card contains important client demographic related data, as well as calls to action to engage in the various client-related workflows.

CLIENTS > eMAR Page Anatomy



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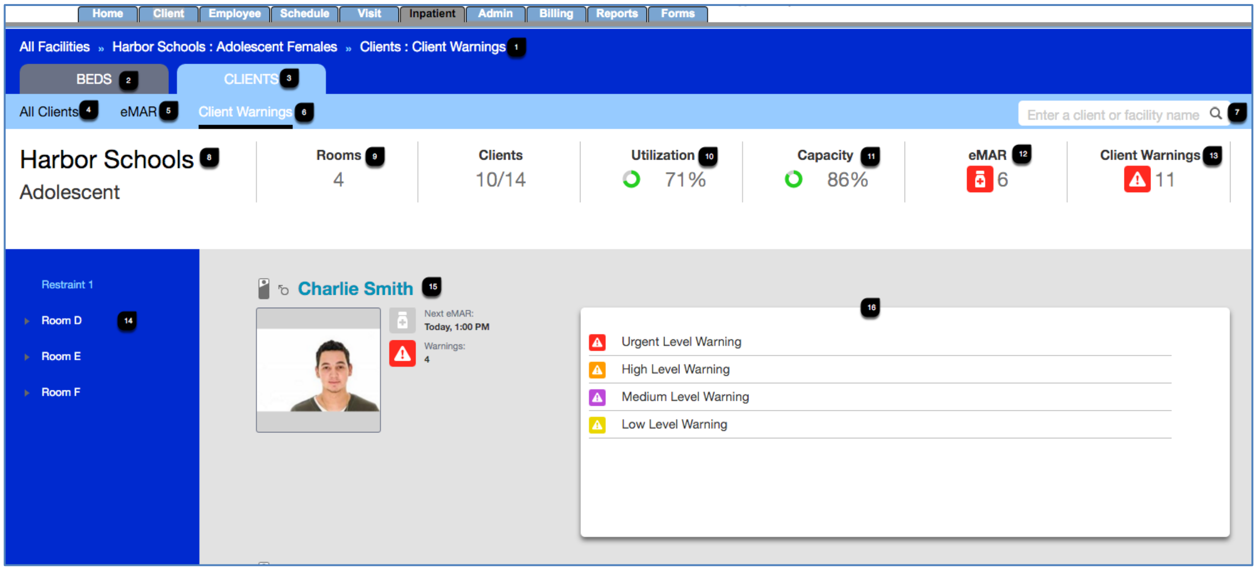
4. **All Clients:** When the user clicks on this link they are directed to the **All Clients** page.
5. **eMAR:** On clicking this link, the user is taken to the **eMAR** page.
6. **Client Warnings:** When this link is clicked the **Client Warnings** page is displayed.
7. **Client Search:** When a user starts to enter characters into this SAYT field, a dropdown appears which is populated by clients whose name (or ID) contains the characters entered. On clicking one of the clients displayed, they are brought to the client's overview page. (Note: this search functionality is present on *every* page within the Facility Whiteboard.)
8. **Facility/Wing:** This label displays the name of the facility/wing that the user is currently viewing.
9. **Rooms (Client Census Bar):** This column displays the number of rooms that are in the facility/wing.
10. **Utilization (Client Census Bar):** This column shows the total Utilization for the Facility/Wing. The calculation used to identify this percentage is: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
11. **Capacity (Client Census Bar):** This column indicates the total Capacity for the Facility/Wing. This is calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
12. **eMAR (Client Census Bar):** This column displays the number of medications that are currently able to be administered. The icon color — green, yellow, red — indicates the level of soonest-ending administration window. The color is updated based on the rule of thirds. For the first third of the eMAR Administration Window, the icon is green. In the middle third of the eMAR Administration window, the icon is yellow. For the final third of the eMAR Administration Window, the icon is red.
13. **Client Warnings:** This column shows the number of warnings that are present in the facility/wing. The color of the Client Warnings icon correlates to the most severe warning present in the wing/facility.

14. **Room Navbar:** This navbar displays a list of all rooms in the facility. Clicking on the room name will re-direct the user to that specific room's drill down page. When clicked, the expansion icon will display a list of all clients that are currently assigned to the room, or have beds in that room on hold. Clicking a client's name will bring the user to that client's overview page.
15. **Client Snapshot:** This category displays the type of bed and bed status of the client's current assignment, as well as their gender, name, photo (if available), next eMAR Administration, and the count of their warnings.
16. **eMAR Card:** The eMAR card displays all medications that are currently able to be administered, based on their eMAR Administration Window. Medications are ordered within the card in the following manner:
    - STAT medications first
    - PRN medications second
    - All additional medications are listed based on their administration time, putting the medications with the nearest administration windows first.

CLIENTS > Client Warnings Page Anatomy



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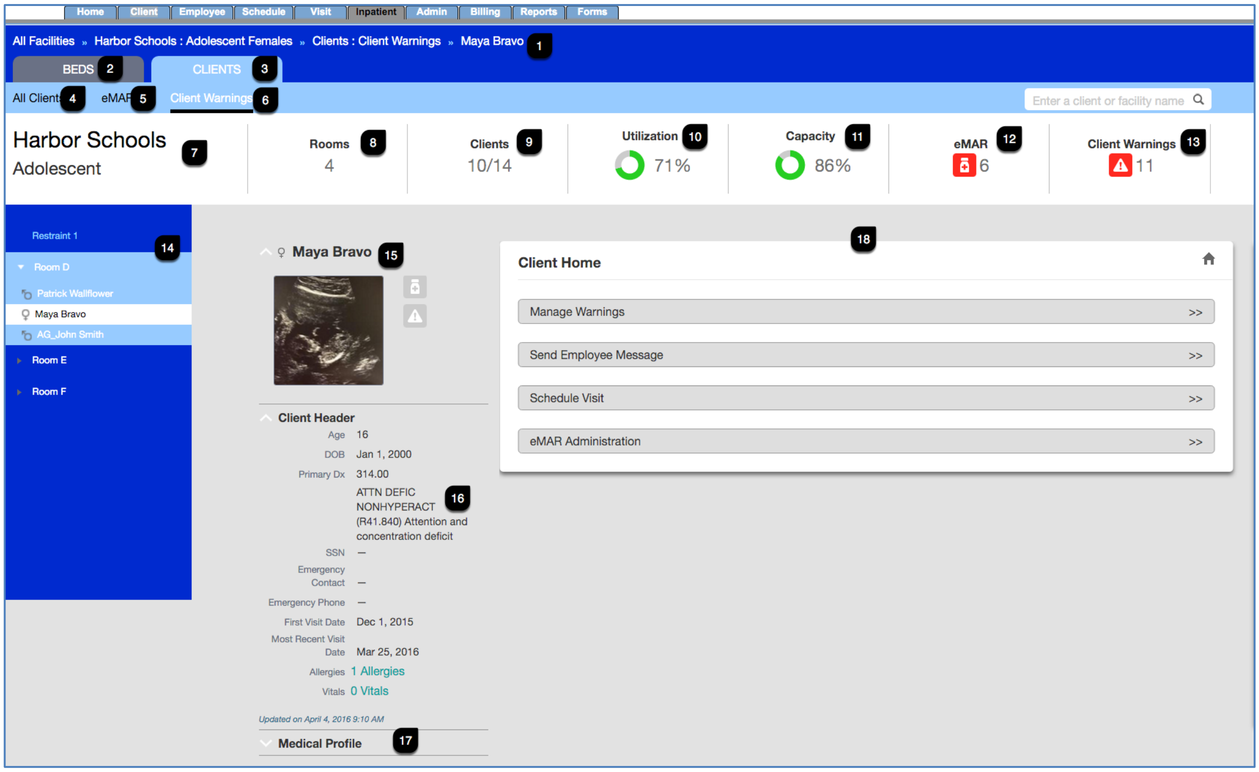
4. **All Clients:** When the user clicks on this link they are directed to the **All Clients** page.
5. **eMAR:** On clicking this link, the user is taken to the **eMAR** page.
6. **Client Warnings:** When this link is clicked the **Client Warnings** page is displayed.
7. **Client Search:** When a user starts to enter characters into this SAYT field, a dropdown appears which is populated by clients whose name (or ID) contains the characters entered. On clicking one of the clients displayed, they are brought to the client's overview page. (Note: this search functionality is present on *every* page within the Facility Whiteboard.)
8. **Facility/Wing:** This label displays the name of the facility/wing that the user is currently viewing.
9. **Rooms (Client Census Bar):** This column displays the number of rooms that are in the facility/wing.
10. **Utilization (Client Census Bar):** This column shows the total Utilization for the Facility/Wing. The calculation used to identify this percentage is: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
11. **Capacity (Client Census Bar):** This column indicates the total Capacity for the Facility/Wing. This is calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
12. **eMAR (Client Census Bar):** This column displays the number of medications that are currently able to be administered. The icon color — green, yellow, red — indicates the level of soonest-ending administration window. The color is updated based on the rule of thirds. For the first third of the eMAR Administration Window, the icon is green. In the middle third of the eMAR Administration window, the icon is yellow. For the final third of the eMAR Administration Window, the icon is red.

13. **Client Warnings:** This column shows the number of warnings that are present in the facility/wing. The color of the Client Warnings icon correlates to the most severe warning present in the wing/facility.
14. **Room Navbar:** This navbar displays a list of all rooms in the facility. Clicking on the room name will re-direct the user to that specific room's drill down page. When clicked, the expansion icon will display a list of all clients that are currently assigned to the room, or have beds in that room on hold. Clicking a client's name will bring the user to that client's overview page.
15. **Client Snapshot:** This category displays the type of bed and bed status of the client's current assignment, as well as their gender, name, photo (if available), next eMAR Administration, and the count of their warnings.
16. **Client Warnings Card:** This card displays all of the client's active warnings. The warnings are ordered by severity, with the most severe warnings first in the list.

CLIENTS > Client Overview Page Anatomy



1. **Navigation Breadcrumbs:** These breadcrumbs allow the user to traverse back through the path they took to arrive at the current page.
2. **BEDS Tab:** This allows the user to view Bed Board-related information and engage in Bed Board workflows.
3. **CLIENTS Tab:** This allows the user to view client-related information and engage in client workflows.
4. **All Clients:** When the user clicks on this link they are directed to the **All Clients** page.
5. **eMAR:** On clicking this link, the user is taken to the **eMAR** page.
6. **Client Warnings:** When this link is clicked the **Client Warnings** page is displayed.
7. **Client Search:** When a user starts to enter characters into this SAYT field, a dropdown appears which is populated by clients whose name (or ID) contains the characters entered. On clicking one of the clients displayed, they are brought to the client's overview page. (Note: this search functionality is present on *every* page within the Facility Whiteboard.)
8. **Facility/Wing:** This label displays the name of the facility/wing that the user is currently viewing.
9. **Rooms (Client Census Bar):** This column displays the number of rooms that are in the facility/wing.
10. **Utilization (Client Census Bar):** This column shows the total Utilization for the Facility/Wing. The calculation used to identify this percentage is: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.
11. **Capacity (Client Census Bar):** This column indicates the total Capacity for the Facility/Wing. This is calculated as: (total number of OCCUPIED beds / total number of beds) * 100, rounded to the nearest whole percent.

12. **eMAR (Client Census Bar):** This column displays the number of medications that are currently able to be administered. The icon color — green, yellow, red — indicates the level of soonest-ending administration window. The color is updated based on the rule of thirds. For the first third of the eMAR Administration Window, the icon is green. In the middle third of the eMAR Administration window, the icon is yellow. For the final third of the eMAR Administration Window, the icon is red.
13. **Client Warnings:** This column shows the number of warnings that are present in the facility/wing. The color of the Client Warnings icon correlates to the most severe warning present in the wing/facility.
14. **Room Navbar:** This navbar displays a list of all rooms in the facility. Clicking on the room name will re-direct the user to that specific room's drill down page. When clicked, the expansion icon will display a list of all clients that are currently assigned to the room, or have beds in that room on hold. Clicking a client's name will bring the user to that client's overview page.
15. **Client Snapshot:** This category indicates the type of bed and bed status of the client's current assignment, as well as their gender, name, photo (if available), next eMAR Administration, and the Client Warning icon that correlates to their most severe warning.
16. **Client Header:** This category displays critical client demographic data, a count of the client's current allergies, and vitals. If the **Allergies** link or **Vitals** link is clicked, a popup containing allergy or vitals data will be displayed.
17. **Medical Profile:** This category shows the standard medical profile data that is present above the *Check In Notes* in *Client Navbar > Medical Profile*.
18. **Client Home:** This card contains buttons that users click on to initiate client-related workflows.

Client Workflows

View Client Warnings

View Client Warnings	
Use	View all of the client's warnings (including historical warnings) in a grid format that displays all fields related to warnings.
Required Security Matrix Rights	InpatientModule; ClientWarningView
Partner Configs	Use the Inpatient Module

Steps to Complete Workflow

1. Navigate to the Inpatient tab.
2. Navigate to the desired facility/wing.
3. Navigate to the desired client's overview page.
4. Click on the **Manage Warnings** button.

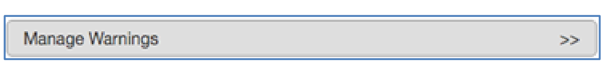
5. You will then be brought to the **Client Warnings** card.

Add Client Warnings

Add Client Warnings	
Use	Add new warnings for the specific client
Required Security Matrix Rights	InpatientModule; ClientWarningView; ClientWarningAdd
Partner Configs	Use the Inpatient Module

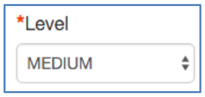
Steps to Complete Workflow

1. Navigate to the Inpatient tab.
2. Navigate to the desired facility/wing.
3. Navigate to the desired client's overview page.
4. Click on the **Manage Warnings** button.

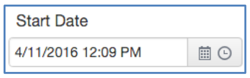


5. You will then be brought to the **Client Warnings** card.

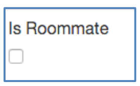
6. Select the appropriate Level.



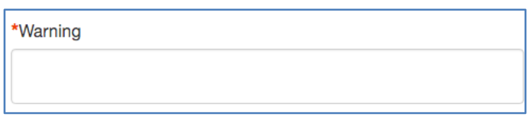
7. Update the **Start Date** if needed or desired. (Note: When the Client Warnings card loads, this field is populated with the current date/time stamp.



8. Specify whether or not the warning is a Roommate warning. Only those warnings that are set as Roommate warnings will be displayed in the Bed Board worfklows.



9. Enter the text of the Warning.



10. Click the **Add Warning** button to save the warning.

11. Note: If at any time you wish to return to the **Client Home** card, click the house icon in the top-right corner of the card.

Edit Client Warnings

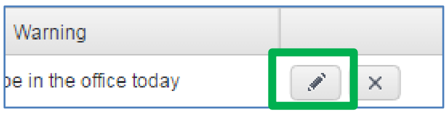
Edit Client Warnings	
Use	Add new warnings for the specific client
Required Security Matrix Rights	InpatientModule; ClientWarningUpdate; ClientWarningAdd
Partner Configs	Use the Inpatient Module

Steps to Complete Workflow

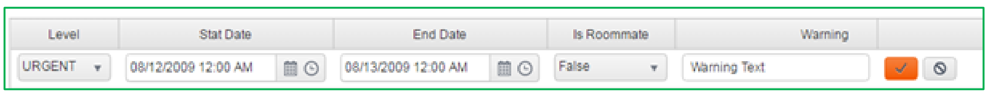
1. Navigate to the Inpatient tab.

2. Navigate to the desired facility/wing.
3. Navigate to the desired client's overview page.
4. Click on the **Manage Warnings** button.

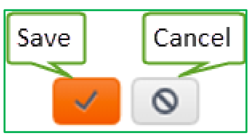
5. Click the **Edit** button for the desired Warning.



6. All fields of the warning are now editable.



7. Click the **Save** button (indicated by the checkmark) to save the changes. To discard the changes, click the Cancel button to exit the workflow.



8. Note: If at any time you wish to return to the **Client Home** card, click the house icon in the top-right corner of the card.

Delete Client Warnings

Edit Client Warnings	
Use	Add new warnings for the specific client
Required Security Matrix Rights	InpatientModule; ClientWarningDelete; ClientWarningAdd
Partner Configs	Use the Inpatient Module

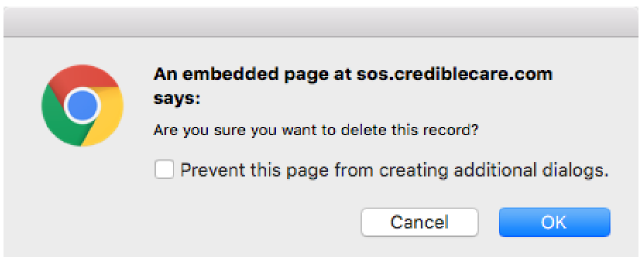
Steps to Complete Workflow

1. Navigate to the Inpatient tab.
2. Navigate to the desired facility/wing.
3. Navigate to the desired client's overview page.

4. Click on the **Manage Warnings** button.

5. Click the **Delete** button for the appropriate Warning.

6. A confirmation warning will be displayed. To delete the Warning, click **OK**. Otherwise, click cancel.



Send Employee Message

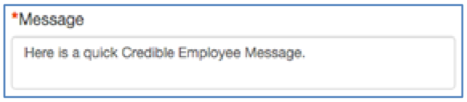
Send Employee Message	
Use	Send a message to another employee via Credible Employee Messaging
Required Security Matrix Rights	InpatientModule; SendEmpMessage
Partner Configs	Use the Inpatient Module

Steps to Complete Workflow

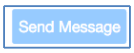
1. Navigate to the Inpatient tab.
2. Navigate to the desired facility/wing.
3. Navigate to the desired client's overview page.
4. Click on **Send Employee Message**.

5. Select the employee you wish to send the message to. Note: Only Employees with *Employee Config: Credible Employee Messaging* checked will be available in the list.

6. Enter the message.



7. Click the **Send Message** button to send the message.



8. Note: If at any time you wish to return to the **Client Home** card, click the house icon in the top-right corner of the card.

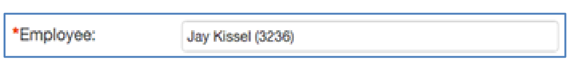
Schedule Visit

Schedule Visit	
Use	Schedule a visit for a client or employee
Required Security Matrix Rights	InpatientModule; PlannerAdd; PlannerAddOther (needed if the user needs to have the ability to schedule visits for other employees)
Partner Configs	Use the Inpatient Module

Steps to Complete Workflow

1. Navigate to the Inpatient tab.
2. Navigate to the desired facility/wing.
3. Navigate to the desired client's overview page.
4. Click the **Schedule Visit** button.

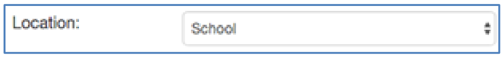
5. Enter the name or ID of the employee you want to schedule a visit for.



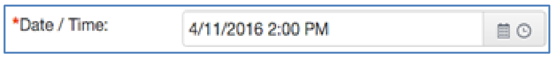
- NOTE: If you have *Security Matirx: PlannerAdd*, but not *Security Matrix: PlannerAddOther*, you will not be able to select an employee. Instead, your name will be displayed in a static label, and you will only be able to schedule a visit for yourself.

6. Select a Visit Type from the **Visit Type** dropdown.

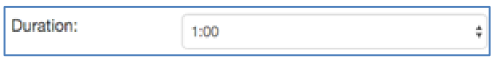
7. Select a Location from the **Location** dropdown (optional).



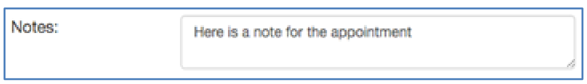
8. Select a date and time from the **Date/Time** picker.



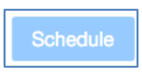
9. Select a duration from the **Duration** dropdown.



10. Enter a note for the appointment (optional).



11. Click the **Schedule** button to save the appointment.



eMAR Administration

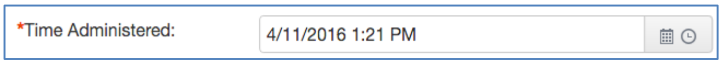
Administer Medications	
Use	Administer medications to a specific client
Required Security Matrix Rights	InpatientModule; eMAR; eMARAdministerMeds
Partner Configs	Use the Inpatient Module

Steps to Complete Workflow

1. Navigate to the Inpatient tab.
2. Navigate to the desired facility/wing.
3. Navigate to the desired client's overview page.
4. Click the **eMAR Administration** button.

5. Click the **Administer** button for the desired medication.

6. Update the **Time Administered** field if needed. (Note: this field defaults to the current date/time.)

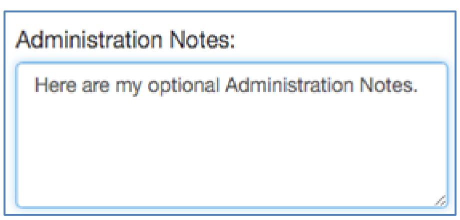


7. Select the appropriate **Administration Result** from the dropdown.

- Note: When an *eMAR Administration Response* has *eMAR Setup: Treat as Taken* unchecked, then when that result is selected from the dropdown the user can optionally enter a **Refusal Reason**. However, if *Treat as Taken* is checked, then the **Refusal Reason** field will not be displayed.

8. Enter the quantity administered.

9. Enter any **Administration Notes** (optional).



10. Click the **Administer** button to record the eMAR Administration. If the user decides not to administer the medication, you can either click the **Cancel** button or the **Home** icon.

Configurations

Color Scheme

The color scheme of the Facility Whiteboard can be controlled via *Partner Config: Facility White Board: Lo-Light Color* and *Partner Config: Facility White Board Hi-Light Color*.