



# Capacity Management *eRecord* Pocket Guide



# #LetsGetDigital

This guide is designed to help you get the most out of the **paperlite** system through quick reference guides for common tasks in **eRecord**

Use this handy checklist to help you on your first day using CapMan:

- ☐ Set up my *views and preferences*
- ☐ How to transfer an inpatient from one ward to another
- ☐ Theatre Patient—Theatre ready attribute
- ☐ How to request a porter for the movement of inpatients
- ☐ How to reserve a bed for an elective patient

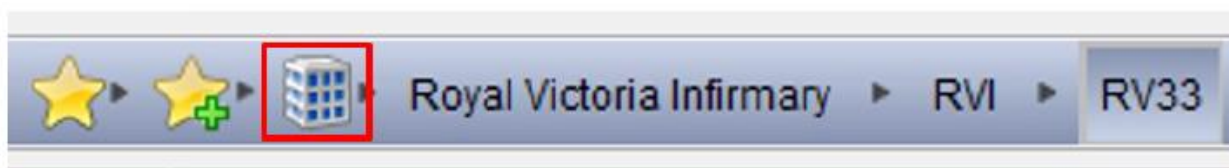
If you need any help with any of these take a look at the Paperlite website <http://paperlite> or call the service desk on 21000.

# How to access CapMan

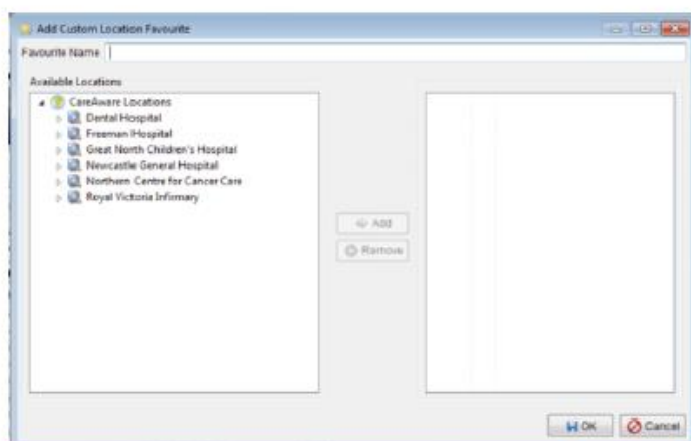
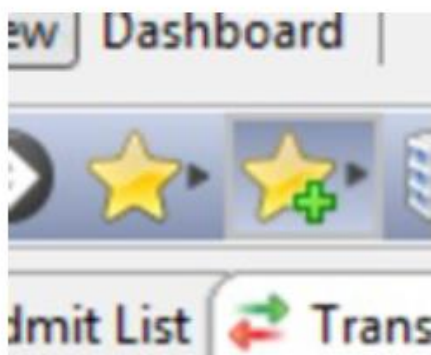
The CapMan icon will be available through the Trust Intranet > eRecord > Login > CapMgmt and through PowerChart

## Configuring your views and favourites

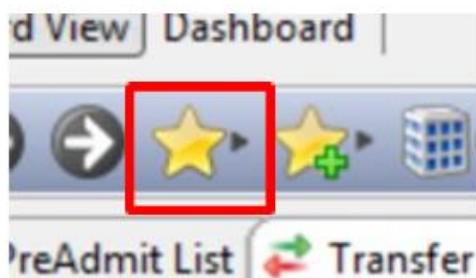
Set your location – at the top of the screen, select the Hospital icon. Pick your ward or location from the list.



It is possible to view multiple bed boards by customising your view. Next to the Hospital icon (step one) select 'add location favourite', name your favourite and select the wards you wish to see. Select 'OK'



Click the first gold star, and select your favourite from the list using the name you gave it in the previous steps.



The Bed Board now shows your two wards set as favourites.



**Setting and filtering lists** – jobs, tasks and activities in CapMan are controlled and tracked by using lists.

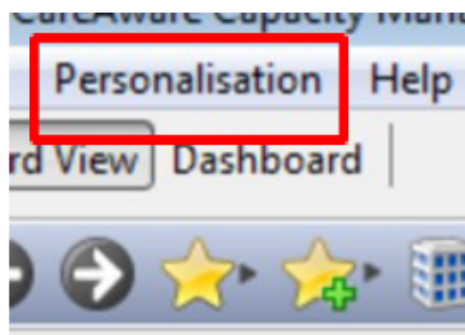
- **Transfer List** : *patients waiting to be moved to another location, and patients on TCI list.*

- Transport List: *list of Porter/Orderly jobs*
- Equipment List: *used to request equipment*
- Pre-admit List : *non-elective patients*
- Patient List: *list of all admitted patients.*

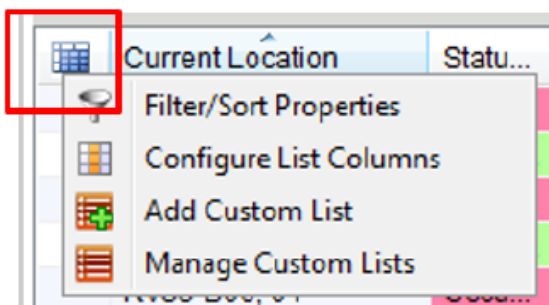
If you require one of these lists, follow the steps below:

Select 'Personalisation' at the top left of the screen.

Select 'My Gadgets' and ensure that the relevant lists have a tick next to them.



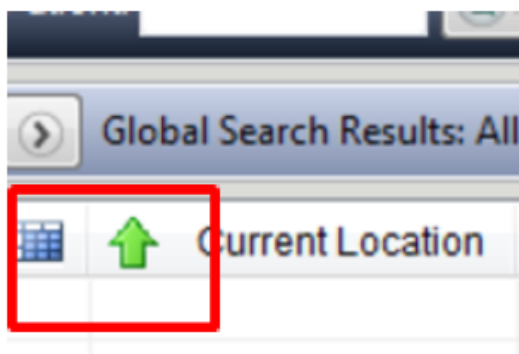
**Filtering lists** – This is helpful if you only wish to see patients who are in your ward, or porter requests for your area.



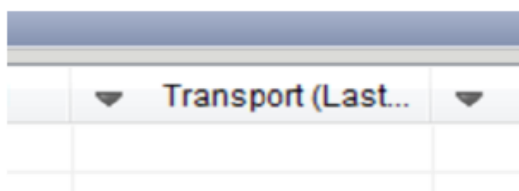
Select the Blue and White grid icon (this is in the corner of each list) and then select Filter/Sort Properties.



A green arrow will appear in one of the top columns to show that filtering is set:

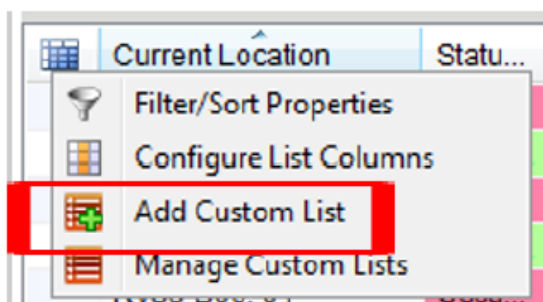


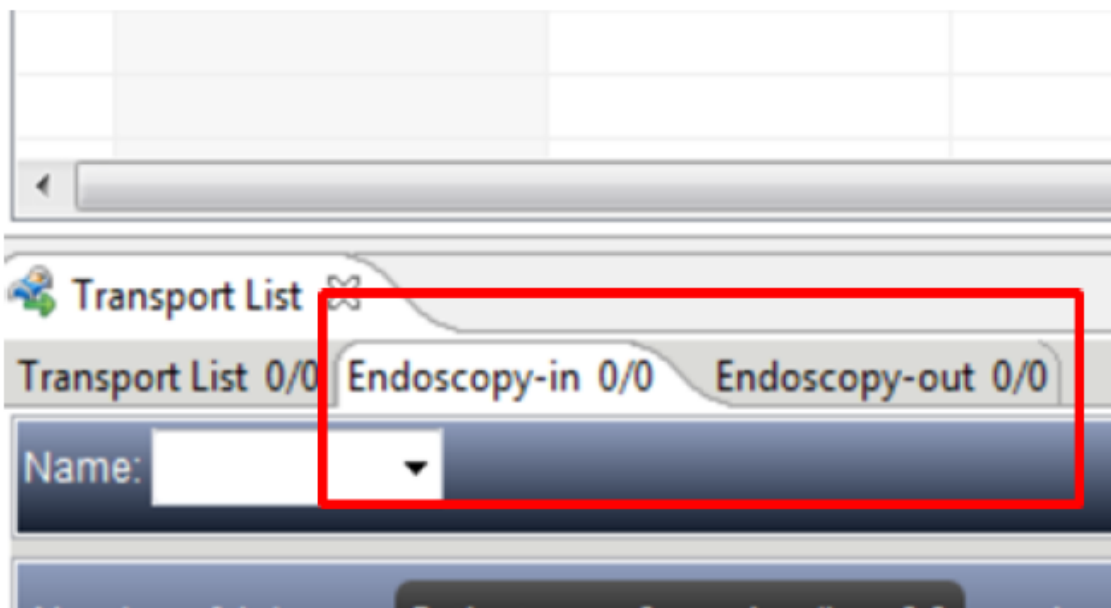
Click the column that you want to filter



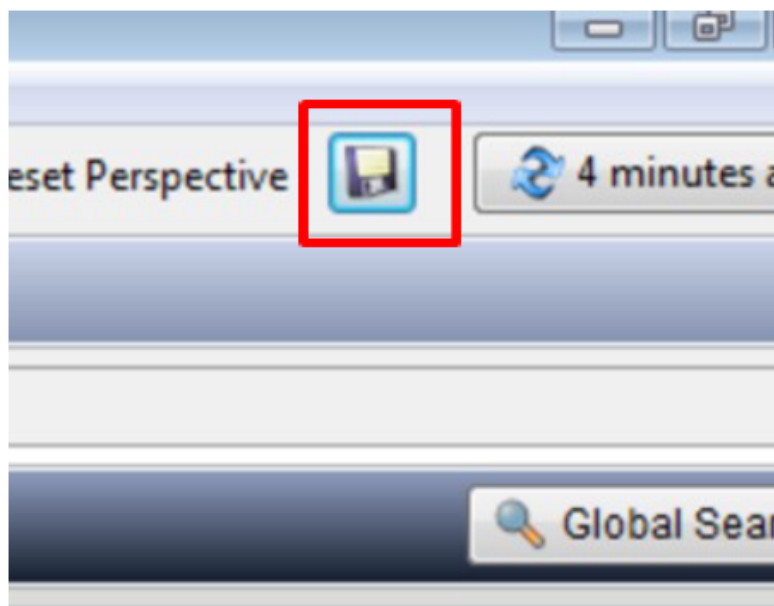
In the pop-up box, select change the settings to show what you wish to see. It is possible to have multiple lists with different filters.

Locate the list you wish to filter click on the Blue and White grid icon, 'Add Custom List' and name this 'yourlocationname-in' (e.g., Radiology-in).





Once you are happy with your views and configuration, save it by clicking on the icon below.



## Transfer patient between wards

In CapMan select the patient to be transferred in the Patient List view.

Click on the arrow in the first column.

Bed Board Patient List

Patient: FHHCMBR, FUZMH

Current Location	Status (Bed)	Name	Age
GNCH02-B01, 02	Occupied	FHHCMBR, FUZMH	4 months 1
GNCH02-B01, 03	Occupied	ZCKKEHHA, FHYSE	6 months 4
GNCH02-B01, 04	Occupied	FRNEZ, TMNFABF	12 months
GNCH02-B01, 05	Occupied	GDETESTCYCLE7, SC10JR	9 years

Click on Transfer, then click Transfer Patient.

GNCH02-B01, 04	Occupied	FRNEZ, TMNFABF
<div> <div> <div></div> <div> <div></div> <div> <div>Launch Powerchart</div> <div>PM Conversation</div> <div>Modify Patient Attributes</div> <div>Transfer</div> <div>Transport</div> <div>Clean</div> <div>Discharge</div> </div> </div> </div> </div>	Occupied	FHHCMBR, FUZMH
	Occupied	JSUBCK, GHFAXCK
	Occupied	GDETESTCYCLE5, SC18JR
	Occupied	PSHOSKBCK, TSHEA-QFA
GNCH02-HA, 09		
GNCH02-C23, 01		
GNCH02-C11, 01		
GNCH02-C10, 01		

+

Transfer Patient

Cancel Transfer

Dispatch Transport When Bed Is Available

Modify Transfer

Unreserve Destination

Return Patient To Held Location

Release Hold on Location

Complete Transfer



Transfer Patient box opens.

The screenshot shows the 'Transfer Patient' form. The top section is a blue header with patient information: **FHHCMBR, FUZMH**, **Male**, **4 months 1 week**, and **Birth Date: 10/09/19**. Below this, the form is divided into sections. The 'Request Time' section has a date dropdown set to '19/09/2019' and a time spinner set to '12:54:25'. The 'Mode of Transport' section has a dropdown menu currently set to 'Trolley'. Below these are 'Patient Attributes' with checkboxes for 'Acuity Score 0', 'Acuity Score 1a', 'Acuity Score 1c', and 'Acuity Score 3'. The bottom of the form shows 'Acuity Score 0' and 'Acuity Score 1'.

Request Time: the current date and time is automatically populated. Click on the *hour:minutes:seconds* and use the up/down arrow to select the required time.

Click on Mode of Transport to select correct means of transport

This screenshot shows the 'Transfer Patient' form with the 'Mode of Transport' dropdown menu open. The menu lists several options: 'Bariatric Bed', 'Bariatric Wheelchair', 'Bed', 'Cot' (which is highlighted in blue), 'Isolette', 'Toddler Cot', 'Trolley', 'Walking', and 'Wheelchair'. The 'Request Time' section remains the same as in the previous screenshot. The 'Patient Attributes' section shows checkboxes for 'Acuity Score 0', 'Acuity Score 1a', 'Acuity Score 1c', and 'Acuity Score 3'.

## Patient Attributes: add/amend patient attributes

19/09/2019 12:54:25 Cot

**Patient Attributes**

<input type="checkbox"/> Acuity Score 0	<input type="checkbox"/> Acuity Score 1
<input type="checkbox"/> Acuity Score 1a	<input type="checkbox"/> Acuity Score 1b
<input type="checkbox"/> Acuity Score 1c	<input checked="" type="checkbox"/> Acuity Score 2
<input type="checkbox"/> Acuity Score 3	<input type="checkbox"/> Bariatric

**Transport Details**

Transport Details: you should type any other information you wish to communicate in this box.

Click the check box to indicate equipment/staff to accompany the patient

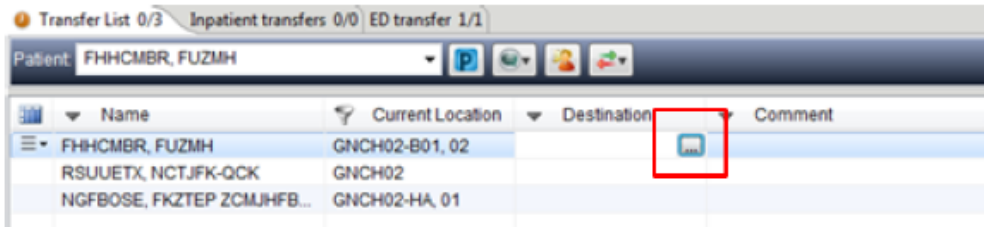
**Transport Details**

Ensure large cuddly toy accompanies patient

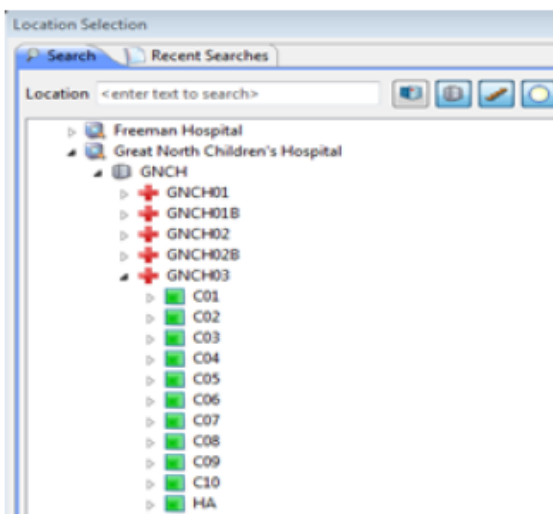
<input type="checkbox"/> IV Pole	<input type="checkbox"/> Monitor	<input checked="" type="checkbox"/> Nurse Accompaniment	<input type="checkbox"/> Oxygen	<input type="checkbox"/> Personal effects
<input type="checkbox"/> See Ward Clerk				

Patient is now on the Transfer List.

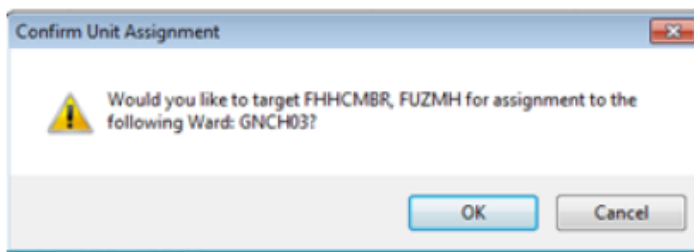
Select patient and in the destination column click the bottom right hand corner to display the ellipsis symbol.



Select the location from the location list.



Confirm Unit Assignment box appears and Click OK.



In the Transfer List the destination has now been populated.

Transfer List 0/3   Inpatient transfers 0/0   ED transfer 1/1

Patient: FHHCMBR, FUZMH

Name	Current Location	Destination	Col
FHHCMBR, FUZMH	GNCH02-B01, 02	<a href="#">GNCH03</a>	
RSUUETX, NCTJFK-QCK	GNCH02		
NGFBOSE, FKZTEP ZCMJHFB	GNCH02-HA, 01		

In Bed Board View the receiving ward identifies a suitable bed space - in this instance we will allocate the patient to C01, 01.

*You can use the Available filter to display only beds that are ready to receive patients.*

Transfer List 0/3   Inpatient transfers 0/0   ED transfer 1/1

Patient: FHHCMBR, FUZMH

Name	Current Location	Destination
FHHCMBR, FUZMH	<a href="#">GNCH02-B01, 02</a>	GNCH03
RSUUETX, NCTJFK-QCK	<a href="#">GNCH02</a>	
NGFBOSE, FKZTEP ZCMJHFB...	<a href="#">GNCH02-HA, 01</a>	

Bed Board   Patient List

Favourites   Available 11   Occupied 8   Dirty 1   Cleaning 0   Blocked 0   Out of 0

Patient:

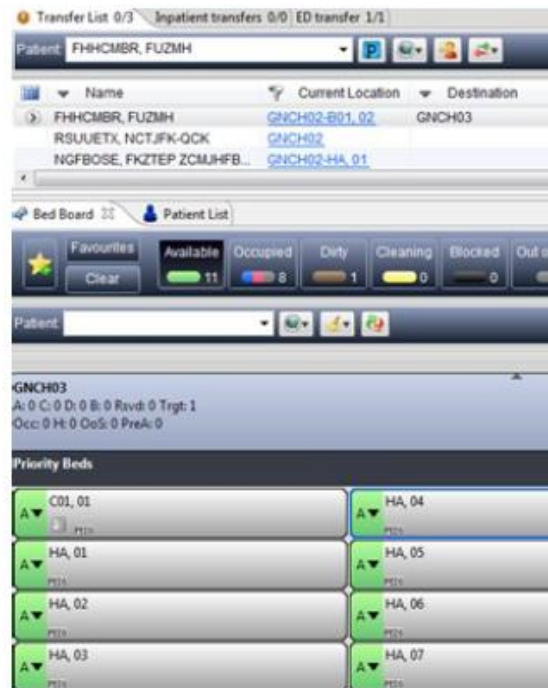
GNCH03  
A: 0 C: 0 D: 0 B: 0 Rvd: 0 Trgt: 1  
Occ: 0 H: 0 OoS: 0 PreA: 0

Priority Beds

A C01, 01 PEDO	A HA, 04 PEDO
A HA, 01 PEDO	A HA, 05 PEDO
A HA, 02 PEDO	A HA, 06 PEDO
A HA, 03 PEDO	A HA, 07 PEDO

In the Transfer List, highlight the patient and 'drag and drop' them into the bed space.

*'Drag and drop' - when the patient's name is highlighted, hold down the left mouse key, move the mouse to the required bed space and release.*

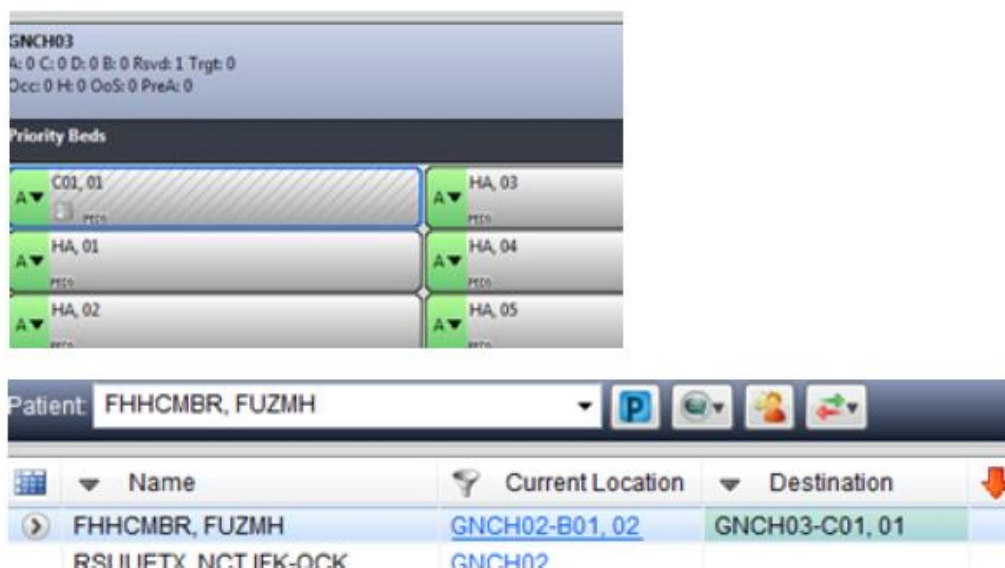


Assign box appears, Transfer reason: click on downward arrow and select reason from drop-down list. Click OK to complete bed reservation.





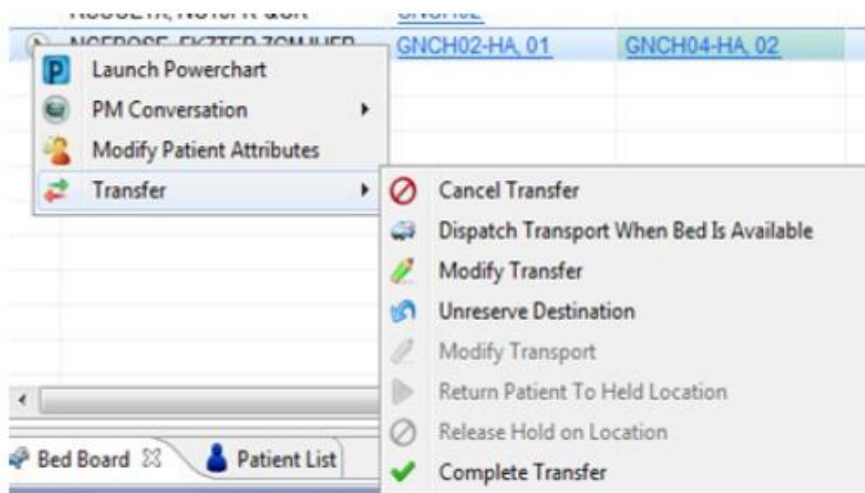
The diagonal lines indicate a reserved bed space.



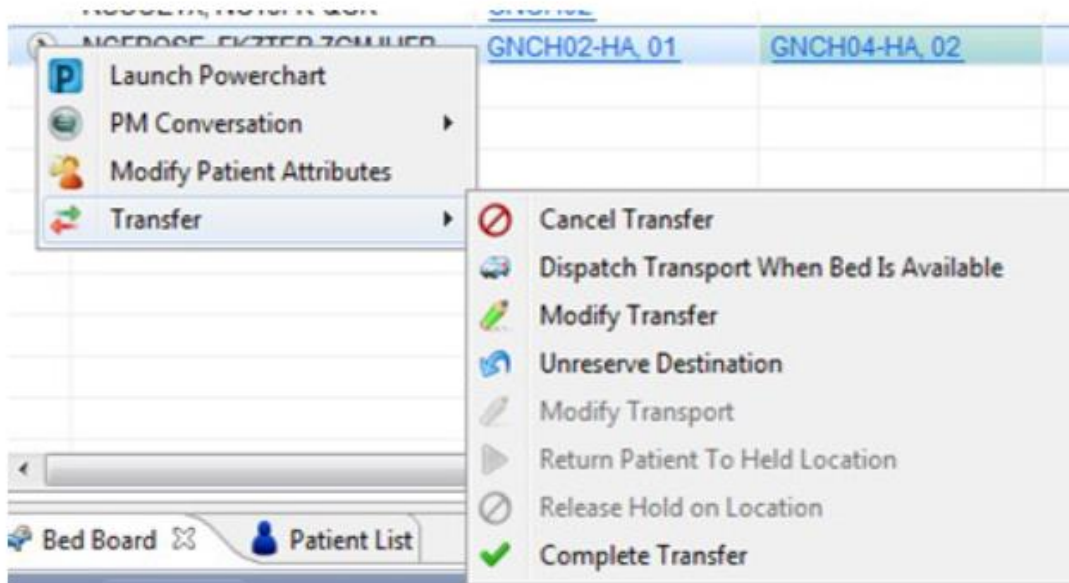
In Transfer List, the destination has been updated to reflect bed space.

If Porter Transport is required, either the departing or receiving ward can request porter transport. In Transfer List highlight the patient and Click on the arrow in the first column.

Click  
'Transfer'  
then click  
'Dispatch  
Transport  
When Bed is  
Available'  
(any calls  
made currently  
between sending  
and receiving ward  
to  
continue as required).



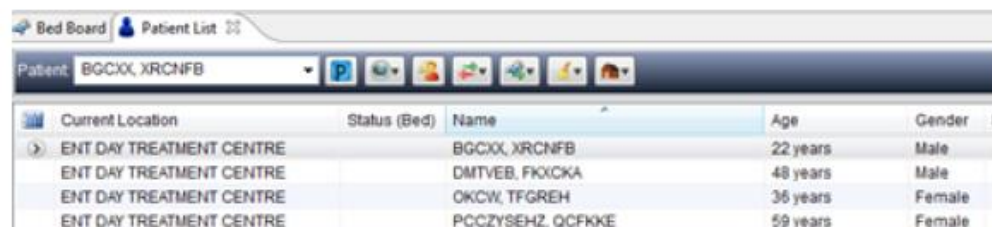
If a patient walks or a porter is not required, the receiving ward can complete the transfer by clicking 'Transfer' followed by 'Complete Transfer'.



This will switch the bed status from reserved to occupied.

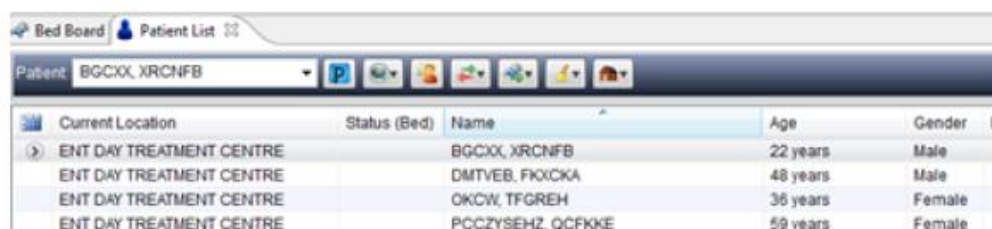
## Theatres Patient – Theatre Ready Icon

In Cap Man 'Patient List' highlight the patient.



Current Location	Status (Bed)	Name	Age	Gender
ENT DAY TREATMENT CENTRE		BGCXX, XRCNFB	22 years	Male
ENT DAY TREATMENT CENTRE		DMTVEB, FKXCKA	48 years	Male
ENT DAY TREATMENT CENTRE		OKCW, TFGREH	36 years	Female
ENT DAY TREATMENT CENTRE		PCCZYSEHZ, QCFKKE	59 years	Female

Click on the 'patient attribute icon'



Current Location	Status (Bed)	Name	Age	Gender
ENT DAY TREATMENT CENTRE		BGCXX, XRCNFB	22 years	Male
ENT DAY TREATMENT CENTRE		DMTVEB, FKXCKA	48 years	Male
ENT DAY TREATMENT CENTRE		OKCW, TFGREH	36 years	Female
ENT DAY TREATMENT CENTRE		PCCZYSEHZ, QCFKKE	59 years	Female

The Modify Patient Attribute box is opened, scroll down the list and check the Theatre Ready box and click OK.



**ABDULLAI, BABY** Female 19 days Birth Date: 03/10/2019 MRN: 90069893 FPN: 10505345

NHS Number: Current Location: RV33-B06, 01 COT 01 Attending Clinician: Hearn, Richard

Diagnosis: Last Known Location:

**Patient Attributes**

- ☐ Acuity Score 0
- ☐ Acuity Score 1b
- ☐ Acuity Score 3
- ☐ Cubicle
- ☐ Frailty Score - Mild
- ☐ Group B Strep
- ☐ Isolation bed
- ☐ MDT fit - Awaiting return to nursing care home
- ☐ Monitoring
- ☐ Patient Off Ward - Approved Release
- ☐ Pregnancy - Loss of 1 twin
- ☐ SANDS
- ☐ Visually Impaired
- ☐ Acuity Score 1
- ☐ Acuity Score 1c
- ☐ Bariatric
- ☐ DoLS
- ☐ Frailty Score - Moderate
- ☐ Hearing Impaired
- ☐ Learning Difficulties
- ☐ MDT fit - Developed complication
- ☐ Negative Pressure Room
- ☐ Patient Off Ward - Location Unknown
- ☐ Prisoner
- ☐ Suicide Precautions
- ☐ Walking Today
- ☐ Acuity Score 1a
- ☐ Acuity Score 2
- ☐ Cognitive Impairment
- ☐ Enhanced Nursing Observations
- ☐ Frailty Score - Severe
- ☐ High Fall Risk
- ☐ Low Bed
- ☐ Medically fit for discharge
- ☐ Not MDT Fit - Occupational Therapy
- ☐ Positive Pressure Room
- ☐ Safeguarding Precautions
- ☒ Theatre Ready
- ☐ Ward Closed (Isolation)


OK Cancel

In Patient List, the Theatre Ready icon now appears under Patient Attributes.



Bed Board Patient List

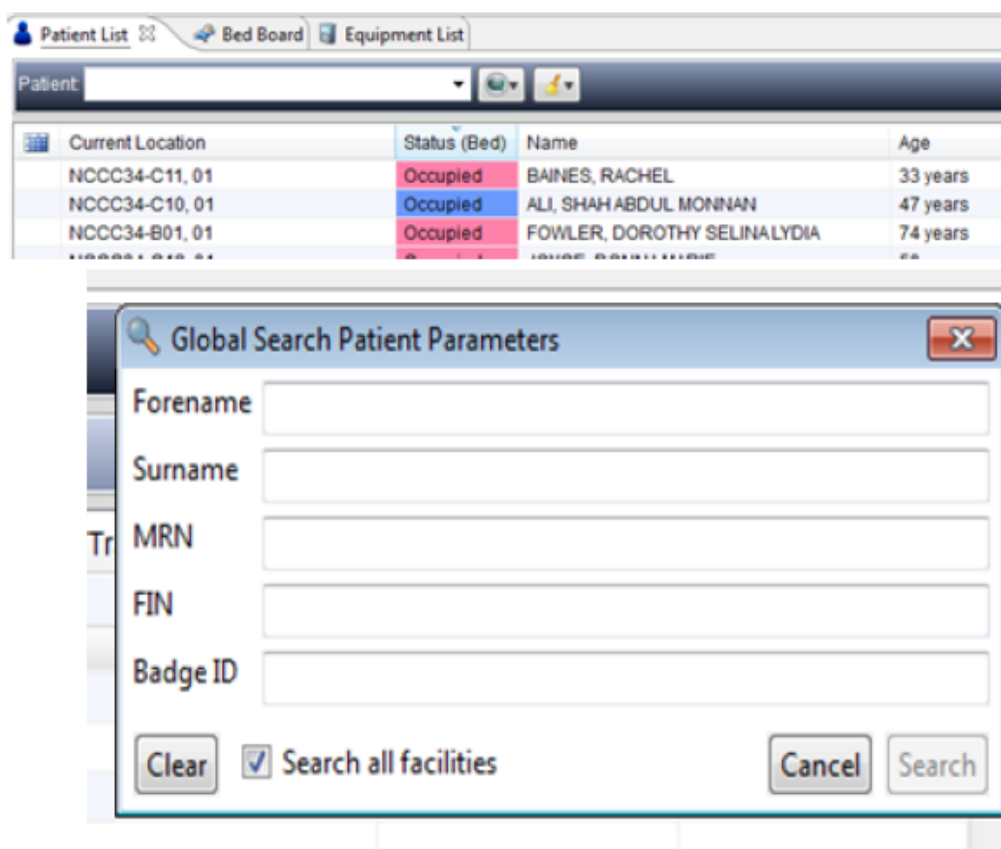
Patient: BGQIX, KRQNF


Current Location	Status (Bed)	Name	Age	Gender	LOS	FN	Patient Attributes	MRP
ENT DAY TREATMENT CENTRE		BGQIX, KRQNF	22 years	Male		10173237		919
ENT DAY TREATMENT CENTRE		DMYVB, POICKA	48 years	Male		9901224		914
ENT DAY TREATMENT CENTRE		OKQV, TFGREH	36 years	Female		9733987		106
ENT DAY TREATMENT CENTRE		PCQZYSEHZ, QCFKKE	58 years	Female		9998109		138

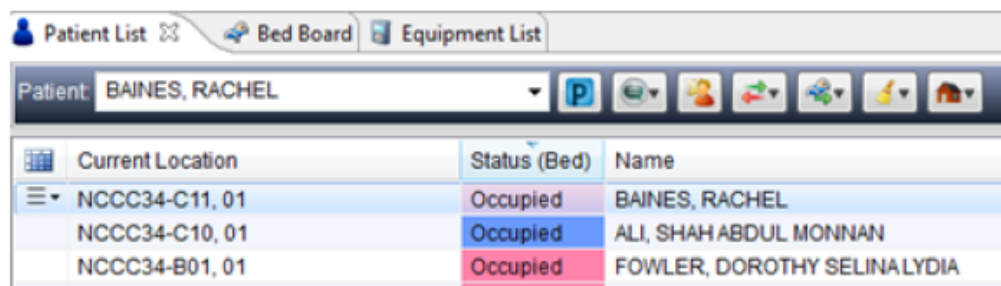
The theatre reception staff will order porter transport for the patient when theatres are ready to receive the patient.



Highlight the patient in the Ward's Patient List tab or use the global search function in the patient list.




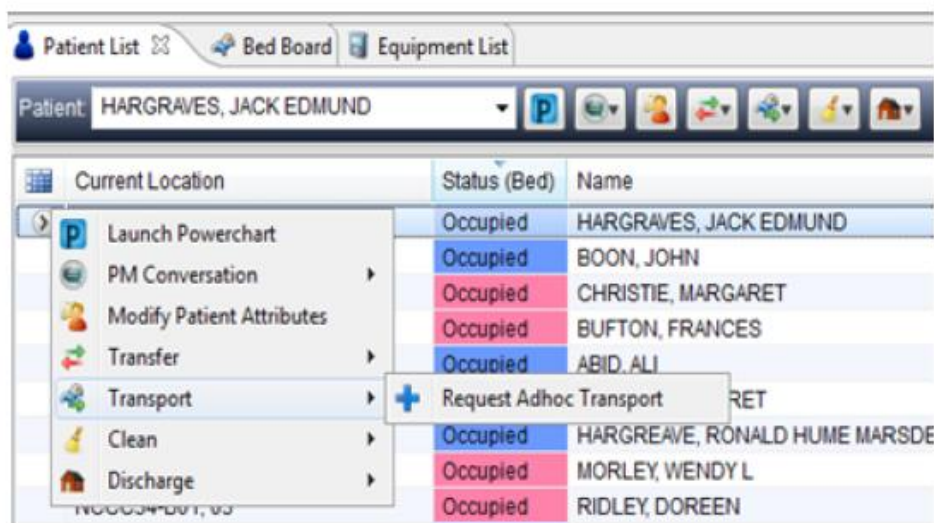
Highlight the patient click on the ellipsis  in the first column.





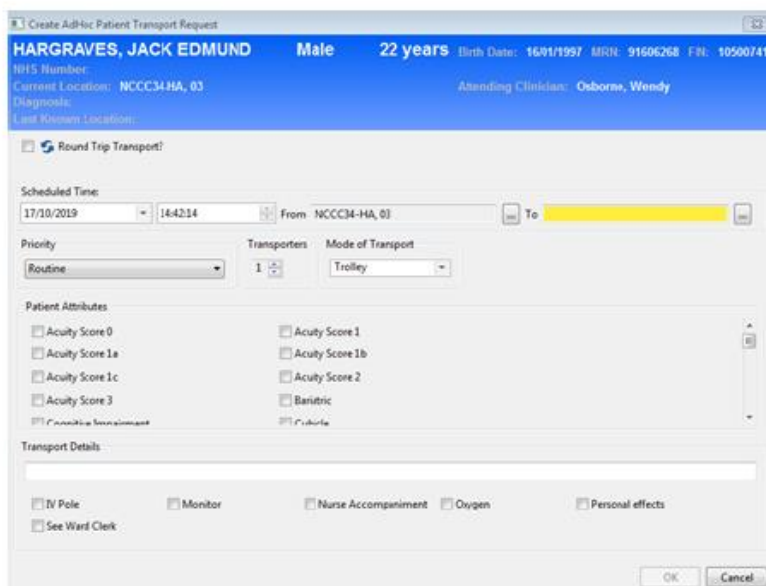
Click Transport, click 'Request Adhoc Transport'

You can use the transport icon  on the patient



Create AdHoc Patient Transport Request box appears.

Click 'Round Trip Transport' if the patient is returning to current location



**Create AdHoc Patient Transport Request**

**HARGRAVES, JACK EDMUND** Male 22 years Birth Date: 16/01/1997 MRN: 91606268 FN: 10500741

NHS Number: NCCC34-HA, 03 Attending Clinician: Osborne, Wendy

Diagnosis: I not Known Location:

☒ Round Trip Transport?

Scheduled Time: 17/10/2019 14:21:14 From: NCCC34-HA, 03 To: [Yellow Box]

Priority: Routine Transporters: 1 Mode of Transport: Trolley

Patient Attributes:

☐ Acuity Score 0 ☐ Acuity Score 1 ☐ Acuity Score 1a ☐ Acuity Score 1b ☐ Acuity Score 2 ☐ Acuity Score 3 ☐ Bariatric

Transport Details:

☐ IV Pole ☐ Monitor ☐ Nurse Accompaniment ☐ Oxygen ☐ Personal effects

☐ See Ward Clerk

OK Cancel

From box: is automatically populated with the ward and bed space.

To box: click on the ellipsis



to bring up Location List.

Create AdHoc Patient Transport Request

**HARGRAVES, JACK EDMUND** Male 22 years Birth Date: 16/01/1997 MRN: 91606268 FIN: 10500741

IBIS Number:

Current Location: NCCC34-HA, 03 Attending Clinician: Osborne, Wendy

Diagnosis:

Last Known Location:

☐ Round Trip Transport?

Scheduled Time: 17/10/2019 14:42:14 From: NCCC34-HA, 03 To: [Yellow Box]

Priority: Routine Transporters: 1 Mode of Transport: Trolley

Patient Attributes

☐ Acuity Score 0 ☐ Acuity Score 1

☐ Acuity Score 1a ☐ Acuity Score 1b

☐ Acuity Score 1c ☐ Acuity Score 2

☐ Acuity Score 3 ☐ Bariatric

☐ Connecting to transport ☐ Vehicle

Transport Details

☐ IV Pole ☐ Monitor ☐ Nurse Accompaniment ☐ Oxygen ☐ Personal effects

☐ See Ward Clerk

OK Cancel

Click on the site then ward and click OK.

*Your location will be in Recent Searches once you have selected your Site and Ward once.*

Select the required Mode of Transport.

**Create AdHoc Patient Transport Request**

**HARGRAVES, JACK EDMUND** Male 22 years Birth Date: 16/01/1997  
 NHS Number: MRN: 91606268 FIN: 10500741  
 Current Location: NCCC34-HA, 03 Attending Clinician: Osborne, Wendy  
 Diagnosis:  
 Last Known Location:

☐ Round Trip Transport?

Scheduled Time: 17/10/2019 15:02:01 From NCCC34-HA, 03

Priority: Routine Transporters: 1 Mode of Transport: Wheelchair

Patient Attributes

<input type="checkbox"/> Acuity Score 0	<input type="checkbox"/> Acuity Score 1
<input type="checkbox"/> Acuity Score 1a	<input type="checkbox"/> Acuity Score 1b
<input type="checkbox"/> Acuity Score 1c	<input type="checkbox"/> Acuity Score 2
<input type="checkbox"/> Acuity Score 3	<input type="checkbox"/> Acuity Score 3
<input type="checkbox"/> Continence Incontinent	<input type="checkbox"/> Bariatric
	<input type="checkbox"/> Crib/Bed

Transport Details

Transport Details: type in any information you wish to communicate to the porters Check tick boxes accordingly. Click OK.

**Create AdHoc Patient Transport Request**

**HARGRAVES, JACK EDMUND** Male 22 years Birth Date: 16/01/1997 MRN: 91606268 FIN: 10500741  
 NHS Number: MRN: 91606268 FIN: 10500741  
 Current Location: NCCC34-HA, 03 Attending Clinician: Osborne, Wendy  
 Diagnosis:  
 Last Known Location:

☐ Round Trip Transport?

Scheduled Time: 17/10/2019 15:02:01 From NCCC34-HA, 03 To FH01

Priority: Routine Transporters: 1 Mode of Transport: Wheelchair

Patient Attributes

<input type="checkbox"/> Acuity Score 0	<input type="checkbox"/> Acuity Score 1
<input type="checkbox"/> Acuity Score 1a	<input type="checkbox"/> Acuity Score 1b
<input type="checkbox"/> Acuity Score 1c	<input type="checkbox"/> Acuity Score 2
<input type="checkbox"/> Acuity Score 3	<input type="checkbox"/> Acuity Score 3
<input type="checkbox"/> Continence Incontinent	<input type="checkbox"/> Bariatric
	<input type="checkbox"/> Crib/Bed

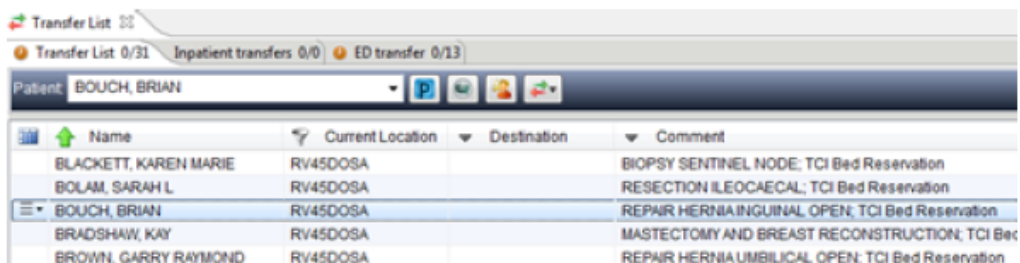
Transport Details

☐ IV Pole ☐ Monitor ☐ Nurse Accompaniment ☐ Oxygen ☐ Personal effects

☐ See Ward Clerk

OK Cancel

In CapMan in the Transfer List tab highlight the patient.

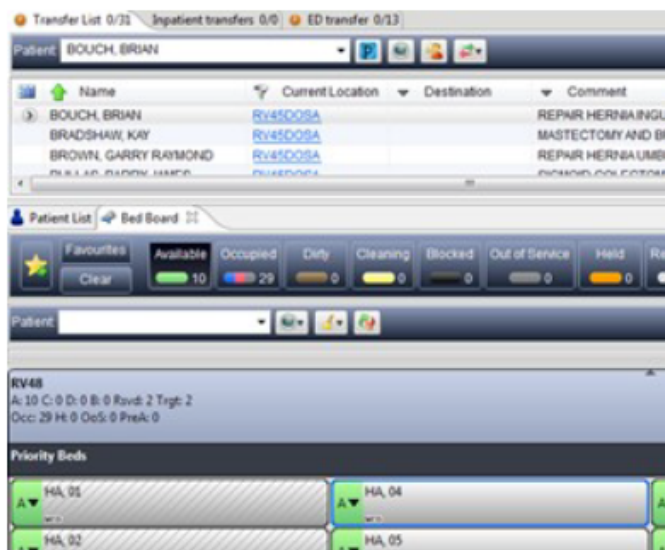


Name	Current Location	Destination	Comment
BLACKETT, KAREN MARIE	RV45DOSA		BIOPSY SENTINEL NODE; TCI Bed Reservation
BOLAM, SARAH L	RV45DOSA		RESECTION ILEOCAECAL; TCI Bed Reservation
BOUCH, BRIAN	RV45DOSA		REPAIR HERNIAINGUINAL OPEN; TCI Bed Reservation
BRADSHAW, KAY	RV45DOSA		MASTECTOMY AND BREAST RECONSTRUCTION; TCI Bed Reservation
BROWN, GARRY RAYMOND	RV45DOSA		REPAIR HERNIAUMBILICAL OPEN; TCI Bed Reservation

In Bed Board View, Bed Manager identifies the appropriate ward and bed.

*You can use the Available filter to display only beds that are ready to receive patients.*

In the Transfer List, highlight the patient and 'drag and drop' them into the bed space, or target them to the ward.



Name	Current Location	Destination	Comment
BOUCH, BRIAN	RV45DOSA		REPAIR HERNIAINGUINAL OPEN; TCI Bed Reservation
BRADSHAW, KAY	RV45DOSA		MASTECTOMY AND BREAST RECONSTRUCTION; TCI Bed Reservation
BROWN, GARRY RAYMOND	RV45DOSA		REPAIR HERNIAUMBILICAL OPEN; TCI Bed Reservation

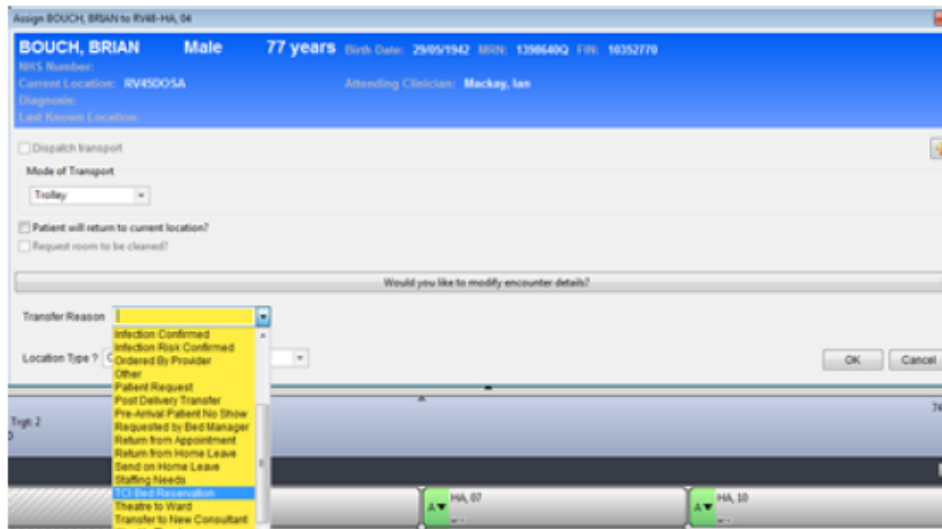
  

Filter	Count
Favourites	0
Available	10
Occupied	29
Dirty	0
Cleaning	0
Blocked	0
Out of Service	0
Held	0

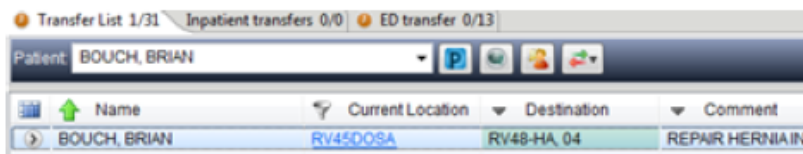
  

Ward	Bed	Status
HA	01	Available
HA	02	Available
HA	04	Available
HA	05	Available

Assign box appears, Transfer Reason: select TCI Bed Reservation, Click OK.



In Transfer List the patient's destination now displays the reserved bed space.



Once the patient arrives on the ward, the ward launches the Elective Inpatient Admission conversation from CapMan using the Conversation icon.



Ward completes the transfer by clicking the arrow next to the patient > Transfer > Complete Transfer. The patient is now shown in the bed.



# *Need more support?*

For more information and additional support go to the Paperlite website [\*\*https://paperlite\*\*](https://paperlite) where you will find:

- Video Guides
- Quick Reference Guides
- Additional Training Sessions

Remember if you need help, our service desk is available 24/7, Call us on 21000

*The Irony of a paper guide for a paperlite EPR is not lost on us ;-)* but we think this small piece of paper is worth it to help you get the most out of the system

