Bed Management

The Bed Management submodule in WellSky allows users to create and edit beds, and assign and remove clients from the bed. This document will review how to do all of these processes for agencies that have inpatient sites.

*To fully utilize the Bed Management submodule, the details in the Residential Site Overview submodule would need to be established first. Please see the document titled, “Residential Site Overview” in the University.

Bed Management
To access the Bed Management submodule in WellSky click on Clinical> Bed Management.

Once you open the Bed Management submodule the below will show on the screen. Some of the basic navigating is highlighted below.

- Select + to expand details for all beds at all sites.
- Select - to collapse to the original view.
- The Site column will list the specific site.
- The Bed Count column indicates the total number of beds at that site.
- The Available Beds column indicates the number of beds in open status that are available to assign to a client.
TOPICS COVERED IN THIS DOCUMENT

- How to Add a Bed
- How to Edit a Bed
  - How To Rename a Bed:
  - How To Remove (Inactivate) a Bed
  - How To Update the Effective and End Dates of a Bed
- How to Assign a Client to a Bed
- How to Manage Current Bed Assignments
  - Changing Effective and End Dates for a Client Assignment
  - Inactivating a Client in the Bed
  - Assigning Clients to a Future Date
HOW TO ADD A BED

When the Bed Management submodule is opened, the user will see all sites associated to the entity (even if the site will not have beds). These sites are loaded at implementation and can be added/removed at any time in the future. Please contact WellSky support to update this detail. The entity will need to add the beds so they can be assigned to clients.

Starting from the point where the Bed Management submodule is already opened:

1. Click on **Add New Bed**.

2. The user will see a pop-up window.

3. Choose a site from the dropdown.

4. Type in a name for the Bed.
5. The bed is now setup. Scroll to the bottom of the screen and click SAVE.

6. The bed will now show up in the list of beds associated to the site.

*Please Note - The bed is now ready to be booked, however there are a couple of optional items that can be added during the initial setup or at a later time that will help to better manage the bed over the long term. Notice the Effective and End Date fields. Since an Effective Date was not setup initially, WellSky will default this to 1/1/1900.

To add these additional details to better manage the bed:

1. Click on EDIT.

2. The pop-up window will re-open and the additional information can be added.

3. Insert the Effective and End dates by either typing in the dates or clicking on the calendar icon to select a date.

4. Confirm the ACTIVE box is checked.

5. Click SAVE.
6. The bed is now ready to assign to a client (or clients).

*Repeat these steps until all the beds are added for the selected site(s).
**HOW TO EDIT A BED**

Editing an existing bed may come in handy if the name of the bed needs to be updated, the bed is no longer in use, or effective and end dates need to be changed. This is all dependent on the needs of the entity and changes that might occur as time goes on.

How To Rename a Bed:

1. Click the EDIT to the left of the bed to edit.
2. The pop-up window will appear.
3. In the Bed Name field, type in a new name.
4. Click SAVE.
5. The new bed name will now appear.

How To Remove (Inactivate) a Bed:

1. Click the EDIT to the left of the bed name.
2. The pop-up window will appear.
3. Click the ACTIVE box to remove the check.
4. Click SAVE.

5. The bed will be removed from the site it was associated to.

How To Update the Effective and End Dates of a Bed:

1. Click the EDIT to the left of the bed to edit.

2. The pop-up window will appear.

3. Click on the calendar icon for the Effective Date and choose a new date. 
   *Note-* the current day will always appear at the bottom of the calendar.
4. The calendar will collapse and the new chosen date will appear.

5. Click SAVE to complete the update to the bed.

*Note - Instead of clicking on the calendar icon in step 3, the user can also click in the date field, type the date and TAB out of the field.

*Please Note - To update the End Date field, follow steps 1 - 5 for the End Date section.
**HOW TO ASSIGN A CLIENT TO A BED**

After completion of adding beds to sites, clients will need to be assigned to these beds. Assignments can be made in advance, so that the bed can be reserved for the entire duration of its effectiveness if the entity has planned that far in advance.

Starting from the point where the Bed Management submodule is already opened:

1. Click the Assign Client button to the right of bed in question.

2. The pop-up window will appear.
   *Note - the Site and Name are not editable at this stage.

3. Click in the Client Name field and a dropdown list of clients for the entity will appear. The user can scroll through the list or begin typing a name to narrow the list of choices.

5. Choose an Effective and End Date (and time if necessary as a bed can have an end date of 3/31/17 @ 11:00 am and an effective date for another client of 3/31/17 @ 1:00pm).
   *Note - Assignments can only be made within the effective and end dates of the bed itself.

6. Click SAVE.

7. This will assign the client to the bed, for that time frame.

*Please Note -

*the expansion caret to the left of the Site Name and to the left of the EDIT button by the Bed Name will need to be clicked to see the information from the Site level down to the Client level.

*the Bed Status shows as OPEN due to there still being availability between the Effective (03/22/2017) and End (03/22/2018) dates.

*Bed Statuses:  Open – The bed is available to assign to a client.

   Out of Service – The bed has an end date before today's date.

   Occupied – The bed is currently assigned to a client.
HOW TO MANAGE CURRENT BED ASSIGNMENTS

Changing Effective and End Dates for a Client Assignment

Starting from the point where the Bed Management submodule is already opened and expansion carets have been clicked to view the clients assigned to the bed(s):

1. Click EDIT to the left of the bed/client that needs to have the time frame updated.

2. The popup window will appear.

3. Click on the calendar icon(s) to the right of the effective and/or end date (and time if necessary as a bed can have an end date of 3/31/17 @ 11:00 am and an effective date for another client of 3/31/17 @ 1:00pm).
   *Note - Assignments can only be made within the effective and end dates of the bed itself.

4. Update the date (and time) as needed.

5. Click SAVE.

6. This will update the time frames and can be confirmed as in the screen shot below.
   *Note - the date was 3/22/17 (step 1) and is now 3/23/17.
Inactivating a Client in the Bed

Starting from the point where the Bed Management submodule is already opened and expansion carets have been clicked to view the clients assigned to the bed:

1. Click EDIT to the left of the bed/client that needs to have the time frame updated.

2. The popup window will appear.

3. Uncheck the ACTIVE check box

4. Click SAVE.

5. This will make this clients assignment inactive. Another client can be booked for the time slot now.

*Please Note- the slot will still show and appear as if no change has been made. This is so the agency can keep a running record of bed assignments. It will also make any easy task of re-activating the assignment.*
Assigning Clients to a Future Date

WellSky will allow an agency to future date client assignments. In a sense; setup reservations for the bed. This process is very similar to how a user Assigns a client to a bed (discussed earlier in this document), however the time frame will be in the future.

Starting from the point where the Bed Management submodule is already opened and the expansion carets have been clicked to view the clients assigned to the bed:

Starting from the point where the Bed Management submodule is already opened:

1. Click the Assign Client button to the right of bed in question.

2. The pop-up window will appear.
   *Note - the Site and Name are not editable at this stage.
3. Click in the Client Name field and choose a client from the dropdown list of clients. The user can scroll through the list or begin typing a name to narrow the list of choices.

4. Choose an effective and end date (and time if necessary as a bed can have an end date of 3/31/17 @ 11:00 am and an effective date for another client of 3/31/17 @ 1:00pm). *Note - Assignments can only be made within the effective and end dates of the bed itself.

5. Click SAVE.

6. This will assign the client to a current bed, for a future time frame.

*Notes
- The two arrows on the left side of the screen show two clients for the same bed at different time frames.
- **Current Occupant** - the client scheduled for the bed for the current date. If the user was to look at this screen on 4/1/17, the name “test Brucato” would appear in this field.
- **Effective and End Date of Bed** - the time frame for the bed itself; the bed can be scheduled for multiple clients within this time frame.

- **Bed Status** - shows as OPEN due to there still being availability between the Effective (03/22/2017) and End (03/22/2018) dates (see Bed Status details earlier in this document).

- **Effective and End Date of Client** - Notice the end date of the first client and the effective date of the second client.