

Vocera Platform Staff Assignment Guide

Version 6.3.0

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About the Vocera Platform Staff Assignment Guide

The Vocera Platform Staff Assignment Guide describes how to perform tasks using the Vocera Platform Staff Assignment application.

You can use this document as you work with Staff Assignment, and you can get the same information from the console's context-sensitive help. The organization of this guide generally matches the layout of the Staff Assignment console.

Getting Started With Staff Assignment

To start using Staff Assignment, you must first log into it.

After you have logged in, online help is available.

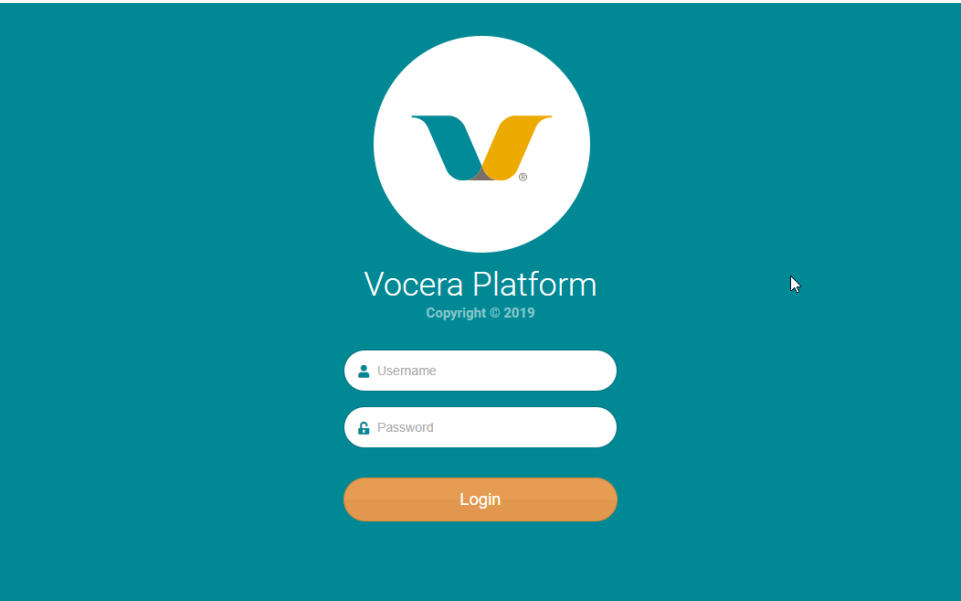
Logging Into Staff Assignment

You can typically log into the Vocera Platform Web Console using the credentials you provide for other applications in your organization (your Active Directory credentials).

Use the following steps to log into the Vocera Platform Web Console using Active Directory authentication:

- 1. In your browser, type the URL of the Vocera Platform Web Console that your administrator has provided for you.

The Vocera Platform login screen appears.

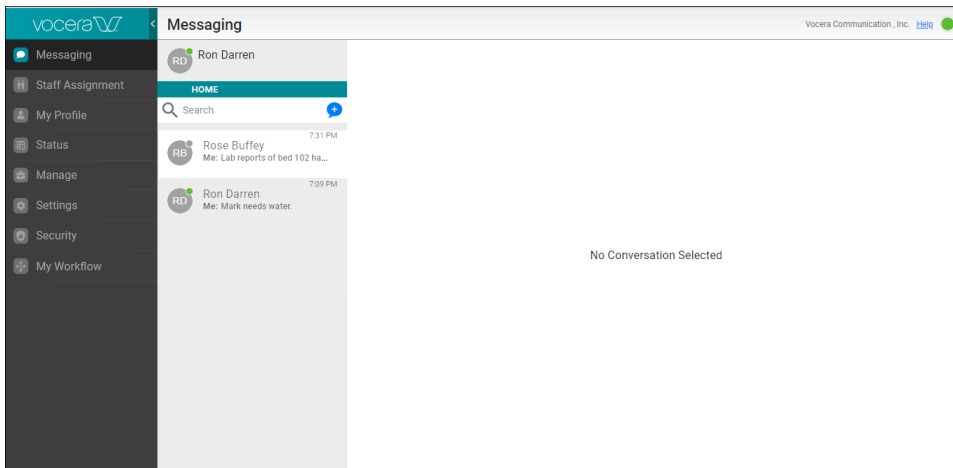


- 2. Specify the following values:

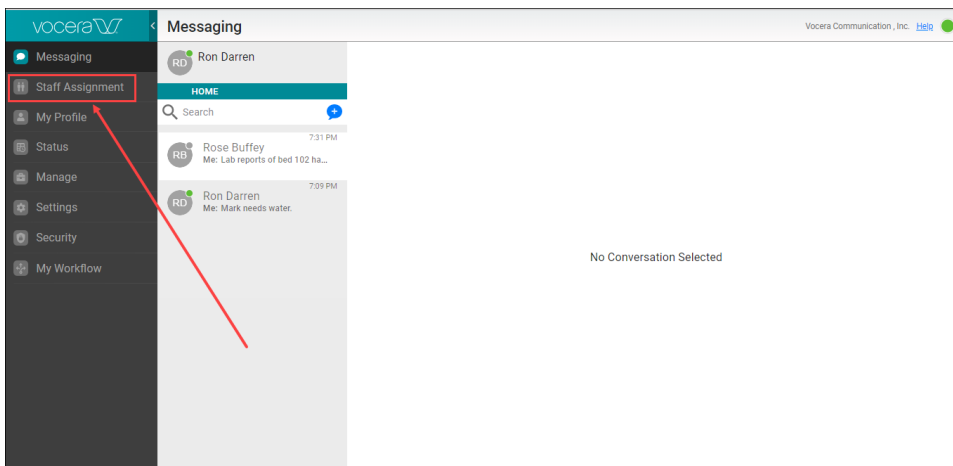
Field	Description
Username	Enter your username (up to 250 characters).
Password	Enter your password (up to 127 characters).

- 3. Click **Log In**.

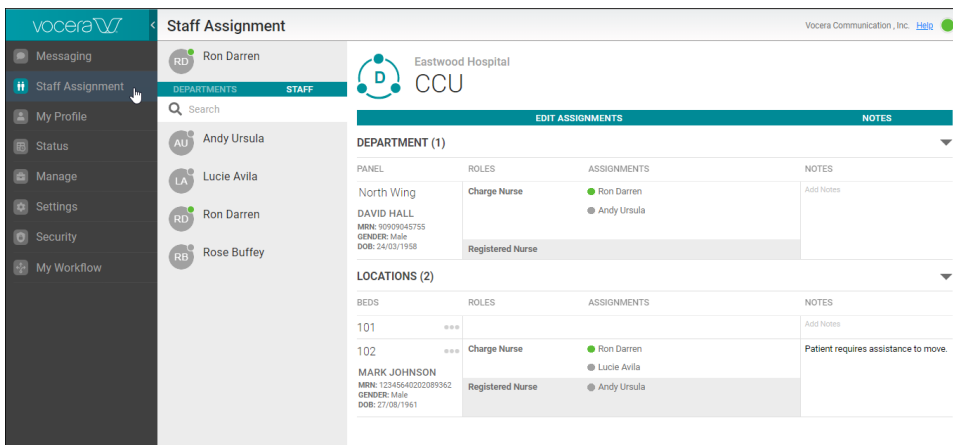
The Vocera Platform Web Console screen appears.



4. If the Staff Assignment page is not visible, select **Staff Assignment** from the panel at the left.



The Staff Assignment page appears.

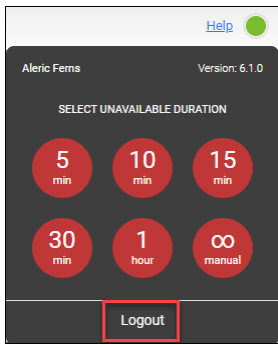


Logging Out

When you are finished using the Vocera Platform Web Console, log out.

To log out from the Vocera Platform Web Console:

1. Click the presence icon in the top right corner of the Vocera Platform Web Console.
The presence dialog box appears.



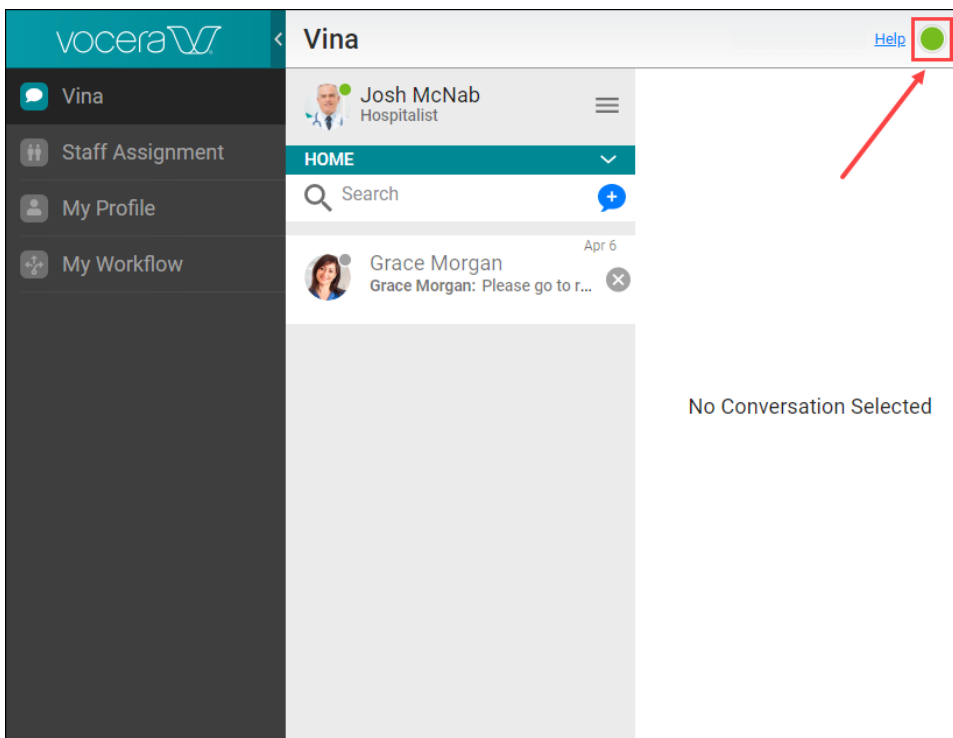
2. Click **Logout** at the bottom of this dialog box.
The system logs you out.

Setting Presence and Availability

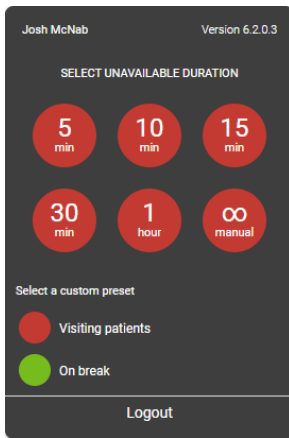
You can specify that you are unavailable, either for a specified period of time or until you make yourself available again.

To specify a period of time in which you are unavailable

1. Click the presence icon at the top right corner of the Home screen, as shown in the following screenshot.



A popup menu appears, displaying a list of options to select.



2. Select one of the following:

- Click one of the options in the **Select unavailable duration** section to specify that you are unavailable for a predefined period of time. After this time has elapsed, you are listed as available.
- Click **Manual** to specify a custom unavailability interval. You remain unavailable until you make yourself available again.
- Click on one of the options in the **Select a custom preset** section. The custom preset feature is available only if this feature is enabled by your system administrators.

When you have specified an unavailability interval, the presence icon turns red indicating a DND or unavailable status.

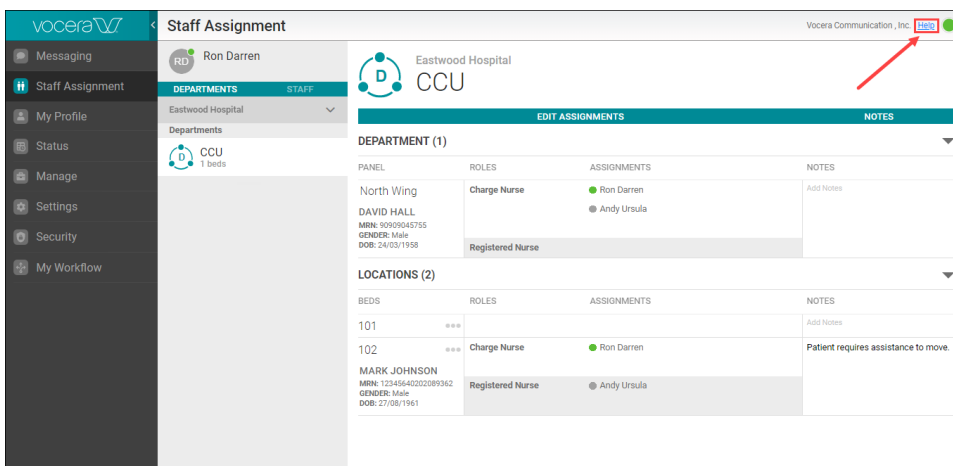
You can click the red presence icon again to revert back to an available status indicated by a green color.

Viewing Online Help

You can access an online version of this guide from the Vocera Platform Web Console.

To view the online help:

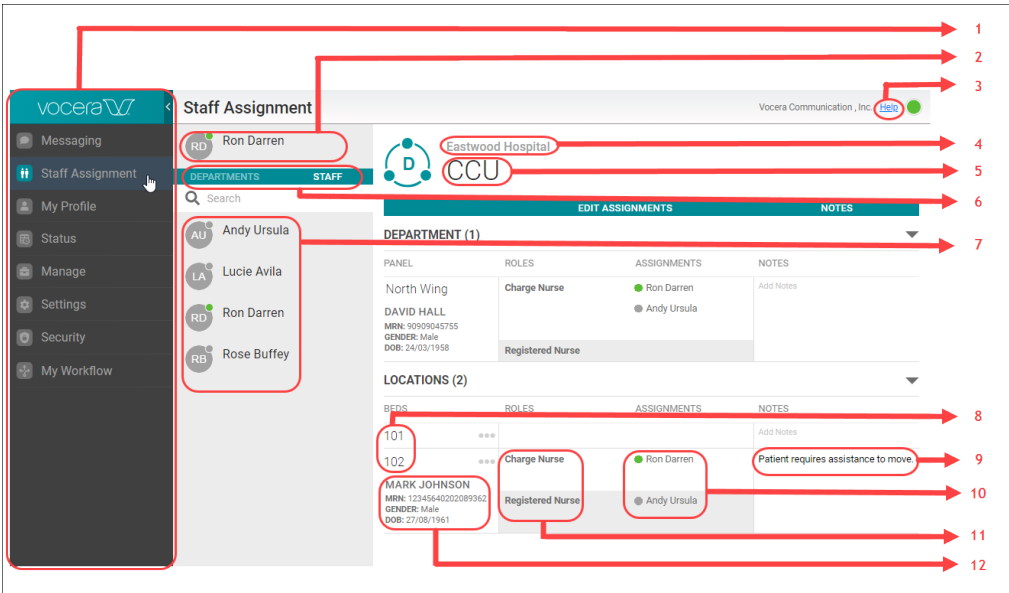
1. Click the help link at the top right corner.



An online version of the Vocera Platform Staff Assignment Guide appears in a separate browser tab.


The Staff Assignment Home Page Layout

This topic describes the layout and the user interface controls available in the Staff Assignment module. The following figure shows the basic user interface controls in the Staff Assignment module:



The following table describes the basic user interface controls in the Staff Assignment module:

Number	Description
1	This is the Navigation Panel. It provides quick access to the various areas within Vocera Platform. As new modules are made available within the Vocera Platform, the navigation panel expands to include those modules too.
2	Displays the name of the logged in user.
3	Web link to the context-sensitive help.
4	Displays the selected facility name.
5	Displays the selected department name.
6	Displays the two main tabs within the Staff Assignment. The tabs are: <ul style="list-style-type: none">• Departments—Displays the departments within the selected facility.• Staff—Displays the staff members within the selected department.
7	Displays the names of the assigned staff members and staff members who have the displayed department as their home department.
8	Displays the bed name.

Number	Description
9	<p>Displays the location notes. You can include helpful text related to the patient's room or location in the Notes field.</p> <p> Note: Be sure to delete or move notes when a patient is discharged or transferred.</p>
10	Displays the names of staff members that are currently assigned to a patient.
11	Displays the roles of staff members that are currently assigned to a patient.
12	Displays the details of the patient such as patient name, MRN number, gender, and date of birth.

Using Staff Assignment

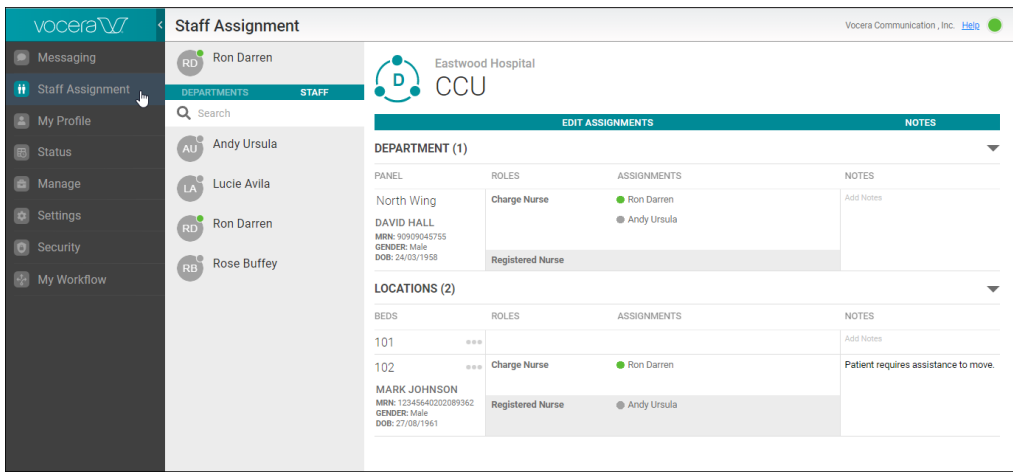
Use the Staff Assignment feature to assign nurses to beds. It allows you to view departments and search for staff members within a department, send messages to care team or individual staff members, remove a staff assignment, and add notes related to a patient.

Viewing Departments

This topic describes the steps to view the departments within a facility.

To view departments within your facility, do the following:

- 1. Navigate to **Staff Assignment** module.
The Staff Assignment page opens and lists the names of the staff in the default department.



- 2. Click **DEPARTMENTS** to view the departments within your facility.
The list of departments within the facility are displayed.

[illegible]

Setting a Department to Home Department

This topic describes the steps to set a department as a home department.

To set a department to home department, do the following:

1. Navigate to **Staff Assignment** module.

The Staff Assignment page opens and lists the names of the staff in the default department.

vocera
Vocera Communication, Inc. [Help](#)

Staff Assignment

- Messaging
- Staff Assignment**
- My Profile
- Status
- Manage
- Settings
- Security
- My Workflow

Ron Darren

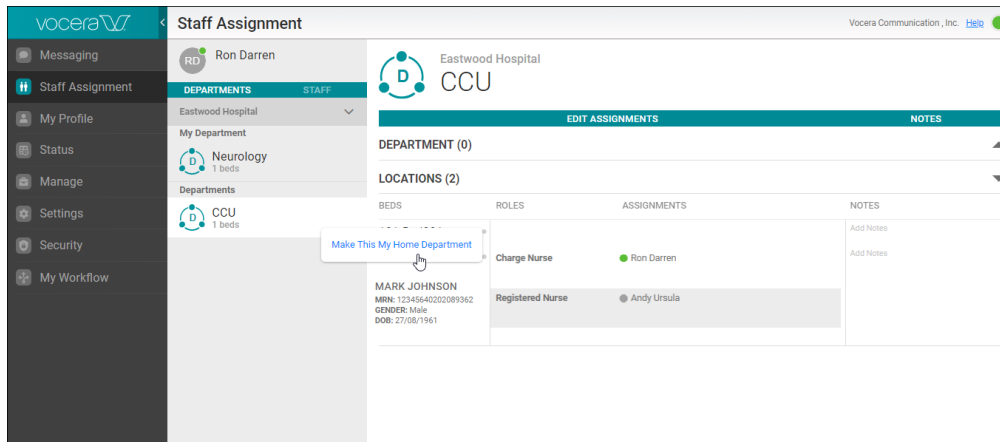
DEPARTMENTS
STAFF

EDIT ASSIGNMENTS			NOTES
DEPARTMENT (1)			
PANEL	ROLES	ASSIGNMENTS	NOTES
North Wing DAVID HALL <small>MIRN: 90909045755 GENDER: Male DOB: 24/03/1958</small>	Charge Nurse	● Ron Darren ● Andy Ursula	Add Notes
	Registered Nurse		
LOCATIONS (2)			
BEDS	ROLES	ASSIGNMENTS	NOTES
101			Add Notes
102	Charge Nurse	● Ron Darren	Patient requires assistance to move.
MARK JOHNSON <small>MIRN: 12345640202089362 GENDER: Male DOB: 27/08/1961</small>	Registered Nurse	● Andy Ursula	

2. Click **DEPARTMENTS** to view the departments within your facility.

The list of departments within the facility are displayed.

3. Right click a department and select the option **Make This My Home Department**.



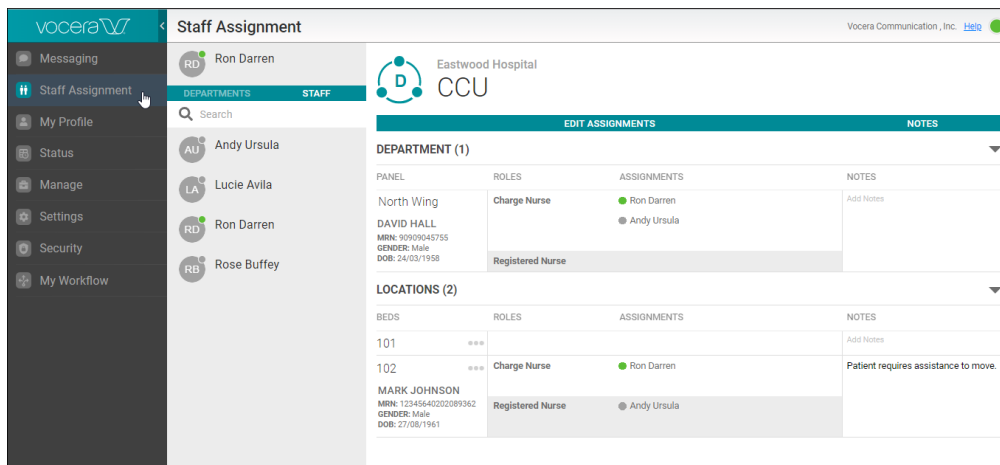
Viewing and Searching Staff Members

This topic describes the steps to view and search the staff members within a department or all departments in a facility.

To view staff members within your facility, do the following:

1. Navigate to **Staff Assignment** module.

The Staff Assignment page opens and lists the names of the staff in the default department.



2. Type the name of the staff or the beginning two letters of the staff name that you want to search in the **Search** field.

All staff names that contain the searched letters or word are listed.



Note: The search result lists all staff names across departments within a facility.

The screenshot shows the Vocera Staff Assignment interface. On the left is a navigation menu with options: Messaging, Staff Assignment (selected), My Profile, Status, Manage, Settings, Security, and My Workflow. The main area is titled 'Staff Assignment' and shows 'Eastwood Hospital CCU'. Below this, there are two tabs: 'DEPARTMENTS' and 'STAFF'. The 'STAFF' tab is selected. A search bar is visible in the 'DEPARTMENTS' list. The main content area displays a table with columns: PANEL, ROLES, ASSIGNMENTS, and NOTES. The table is divided into two sections: 'DEPARTMENT (1)' and 'LOCATIONS (2)'. The 'DEPARTMENT (1)' section shows a table with columns: PANEL, ROLES, ASSIGNMENTS, and NOTES. The 'LOCATIONS (2)' section shows a table with columns: BEDS, ROLES, ASSIGNMENTS, and NOTES. The table lists staff members and their assignments to various locations and patients.

Assigning Staff Member by Clicking

This topic describes the steps to assign a staff member by clicking the name of a staff member.

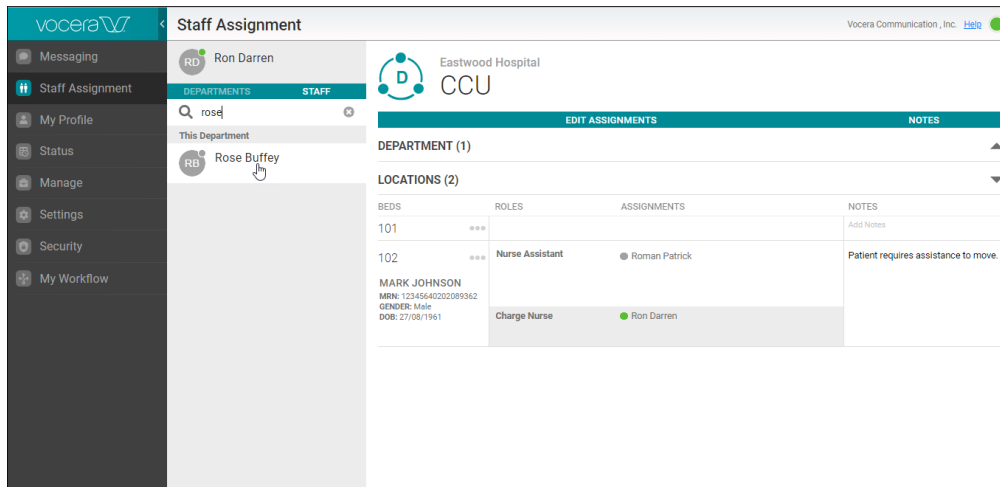
To assign a staff member by clicking, do the following:

1. Navigate to **Staff Assignment** module.

The Staff Assignment page opens and lists the names of the staff members in the default department.

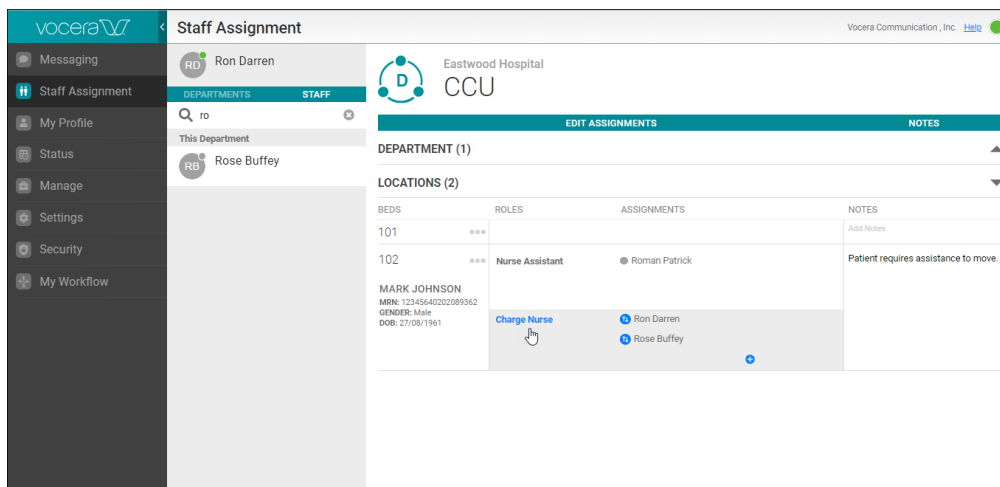
The screenshot shows the Vocera Staff Assignment interface. On the left is a navigation menu with options: Messaging, Staff Assignment (selected), My Profile, Status, Manage, Settings, Security, and My Workflow. The main area is titled 'Staff Assignment' and shows 'Eastwood Hospital CCU'. Below this, there are two tabs: 'DEPARTMENTS' and 'STAFF'. The 'STAFF' tab is selected. A search bar is visible in the 'DEPARTMENTS' list. The main content area displays a table with columns: PANEL, ROLES, ASSIGNMENTS, and NOTES. The table is divided into two sections: 'DEPARTMENT (1)' and 'LOCATIONS (2)'. The 'DEPARTMENT (1)' section shows a table with columns: PANEL, ROLES, ASSIGNMENTS, and NOTES. The 'LOCATIONS (2)' section shows a table with columns: BEDS, ROLES, ASSIGNMENTS, and NOTES. The table lists staff members and their assignments to various locations and patients.

2. In the **STAFF** tab, click the name of the staff member that you want to assign to a patient. For example, **Rose Buffey**.



3. In **EDIT ASSIGNMENTS** tab, click the role that you plan to assign to the selected staff member. For example, click **Charge Nurse**.

The selected staff is assigned the role of Charge Nurse. In this example, Rose Buffey is assigned as a charge nurse to the patient Mark Johnson.



Assigning Staff Member by Replacing

This topic describes the steps to assign a staff member by replacing an assigned staff member.

To assign a staff member using replace, do the following:

1. Navigate to **Staff Assignment** module.

The Staff Assignment page opens and lists the names of the staff members in the default department.

The screenshot shows the Vocera Staff Assignment interface. On the left is a navigation menu with options: Messaging, Staff Assignment (selected), My Profile, Status, Manage, Settings, Security, and My Workflow. The main area is titled 'Staff Assignment' and includes a search bar and a list of staff members: Ron Darren, Andy Ursula, Lucie Avila, Ron Darren, and Rose Buffey. The 'EDIT ASSIGNMENTS' table is displayed, showing assignments for two departments. The first department, 'DEPARTMENT (1)', has a 'Charge Nurse' role assigned to Ron Darren and a 'Registered Nurse' role assigned to Andy Ursula. The second department, 'DEPARTMENT (2)', has a 'Charge Nurse' role assigned to Ron Darren and a 'Registered Nurse' role assigned to Andy Ursula.

DEPARTMENT (1)	ROLES	ASSIGNMENTS	NOTES
North Wing	Charge Nurse	Ron Darren	Add Notes
DAVID HALL MRN: 90909045755 GENDER: Male DOB: 24/03/1958	Registered Nurse	Andy Ursula	

DEPARTMENT (2)	ROLES	ASSIGNMENTS	NOTES
101	Charge Nurse	Ron Darren	Add Notes
102	Registered Nurse	Andy Ursula	Patient requires assistance to move.

2. In the **STAFF** tab, click the name of the staff member that you want to assign to a patient. For example, **Rose Buffey**.

The screenshot shows the Vocera Staff Assignment interface. The search bar now contains 'rose'. The staff list is filtered to show only Rose Buffey, who is highlighted with a mouse cursor. The 'EDIT ASSIGNMENTS' table is still visible, showing the same assignments as before.

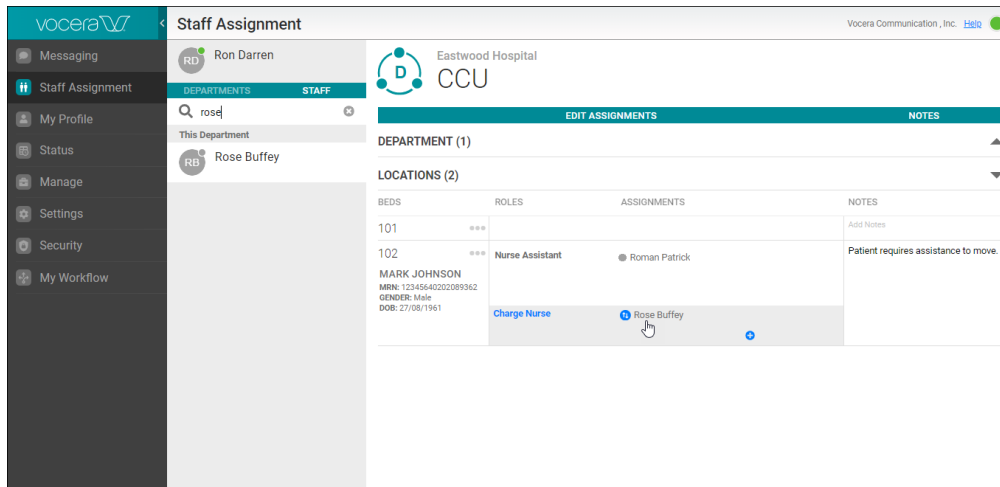
DEPARTMENT (1)	ROLES	ASSIGNMENTS	NOTES
101	Charge Nurse	Ron Darren	Add Notes
102	Registered Nurse	Andy Ursula	Patient requires assistance to move.

3. In **EDIT ASSIGNMENTS** tab, click the staff member that you plan to replace with the selected staff member. For example, click **Ron Darren**.

The screenshot shows the Vocera Staff Assignment interface. The search bar contains 'rose'. The staff list is filtered to show only Rose Buffey, who is highlighted with a mouse cursor. The 'EDIT ASSIGNMENTS' table is still visible, showing the same assignments as before. The 'Charge Nurse' role in the first department is now assigned to Rose Buffey, and the 'Registered Nurse' role in the second department is now assigned to Rose Buffey.

DEPARTMENT (1)	ROLES	ASSIGNMENTS	NOTES
101	Charge Nurse	Rose Buffey	Add Notes
102	Registered Nurse	Rose Buffey	Patient requires assistance to move.

The selected staff member is replaced the new staff member. In this example, **Ron Darren** is replaced with **Rose Buffey**.



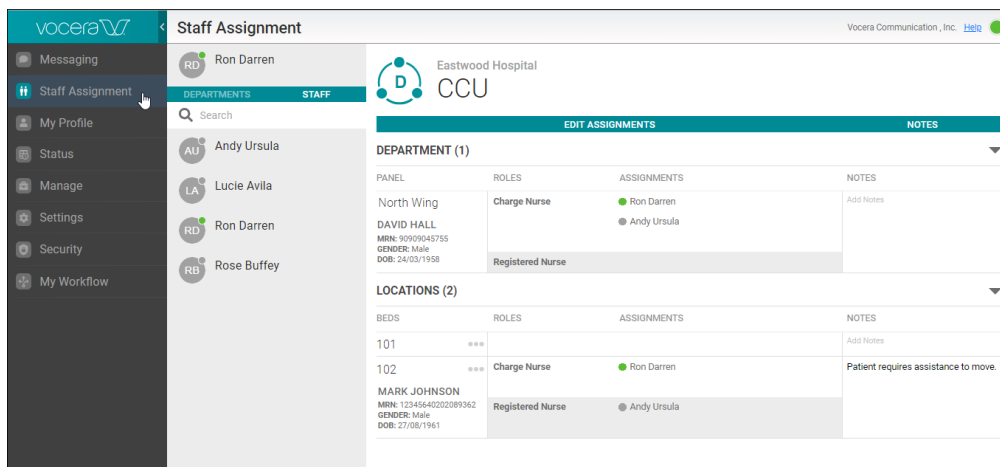
Assigning Staff Member by Typing

This topic describes the steps to assign a staff member by typing the name of a staff member.

To assign a staff member by typing a staff member name, do the following:

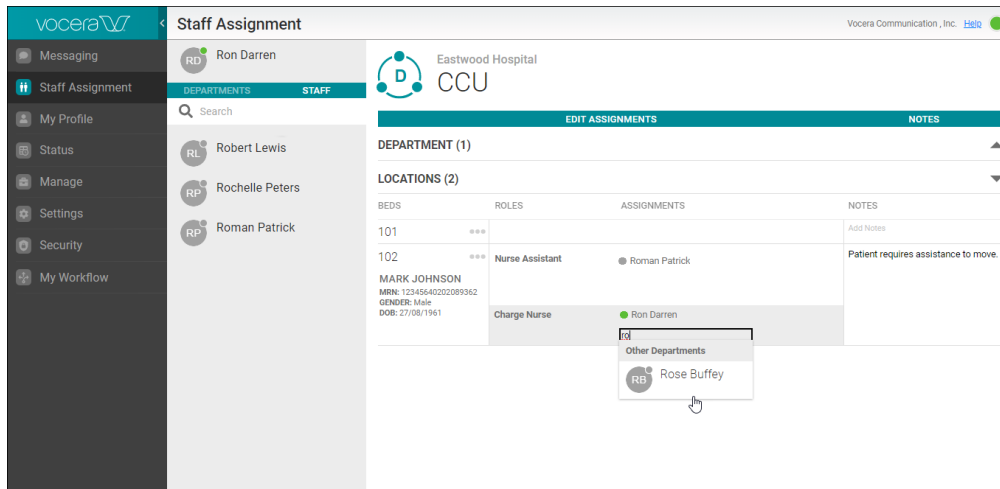
1. Navigate to **Staff Assignment** module.

The Staff Assignment page opens and lists the names of the staff members in the default department.

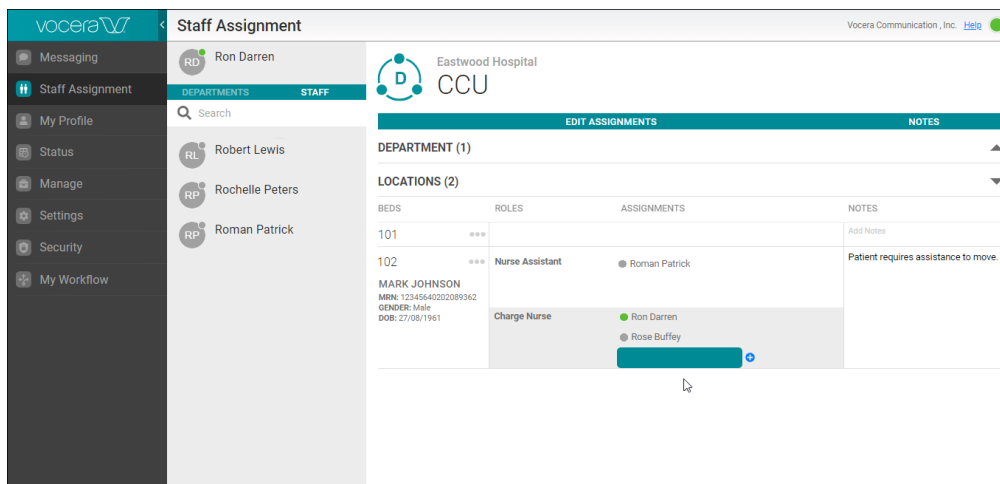


2. In **EDIT ASSIGNMENTS** tab, under Assignments column, type the name of a staff member. For example, type **rose**.

The names of staff members that contain the word **rose** are populated automatically.



3. Select the name of the staff member that you intend to assign. For example, select **Rose Buffey**. The selected staff member is assigned to the respective patient.



Assigning Staff Member using Copy and Paste

This topic describes the steps to assign a staff member using copy and paste.

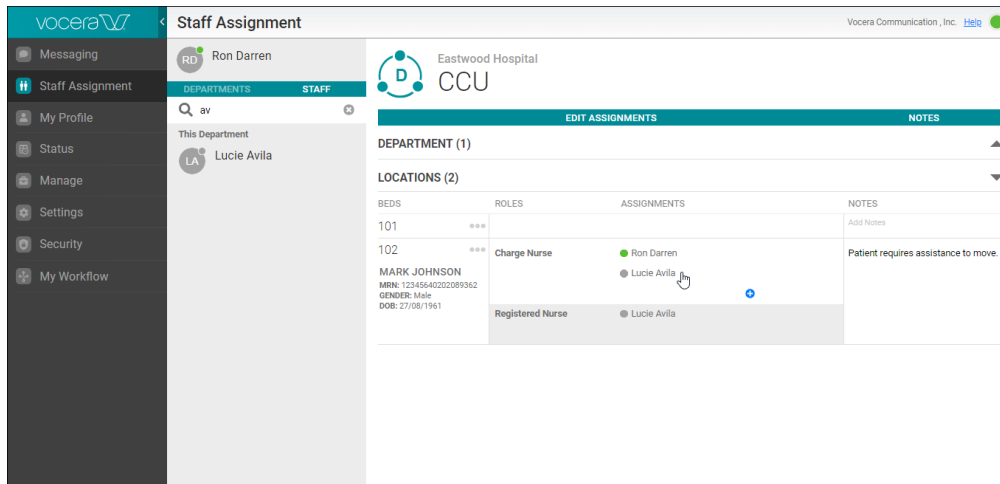
To assign a staff member using copy and paste, do the following:

1. Navigate to **Staff Assignment** module.
The Staff Assignment page opens and lists the names of the staff members in the default department.

2. In the **EDIT ASSIGNMENTS** tab, right click the name of the staff member that you want to copy and select **Copy Assignment** or select the cell and press Ctrl+C. For example, **Lucie Avila**.

3. Right click on the staff member name that you want to replace the copied staff member, or select the cell and press Ctrl+V. For example, **Rose Buffey**.

4. Click **Paste 'Lucie Avila'** from the dropdown list.
5. The existing staff member is replaced with the copied staff member. For example, **Rose Buffey** is replaced with **Lucie Avila**.



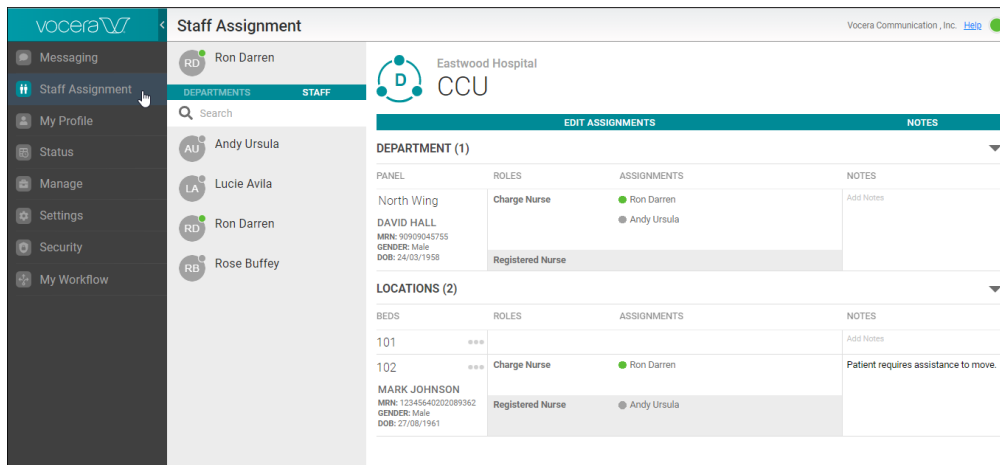
Messaging Care Team

This topic describes the steps to send a message to the Care Team.

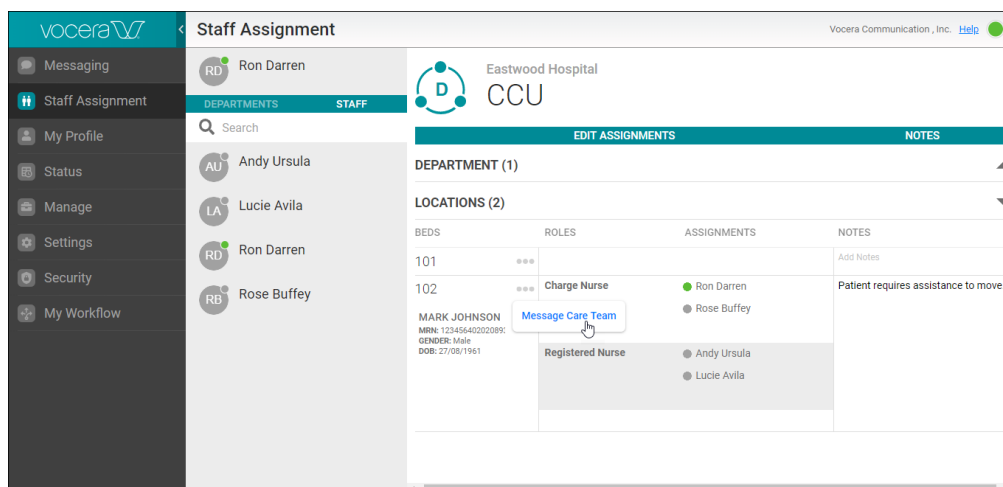
To send a message to the Care Team, do the following:

1. Navigate to **Staff Assignment** module.

The Staff Assignment page opens and lists the names of the staff members in the default department.

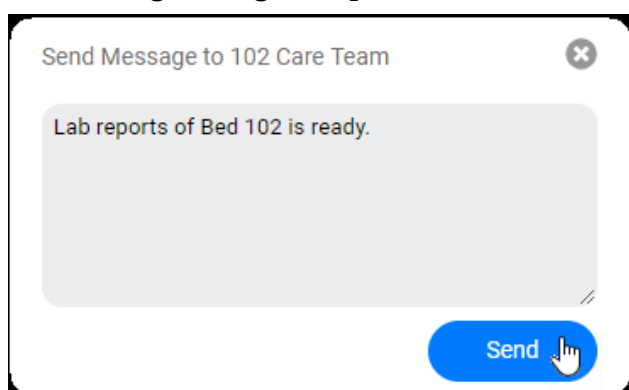


2. In **EDIT ASSIGNMENTS** tab, click the three dots displayed next to the Bed number.
The **Message Care Team** option is displayed.



3. Click **Message Care Team**.

The message dialog box opens.



4. In the message dialog box, enter the message you intend to send to the Care Team. For example, **Lab reports of Bed 102 is ready**.

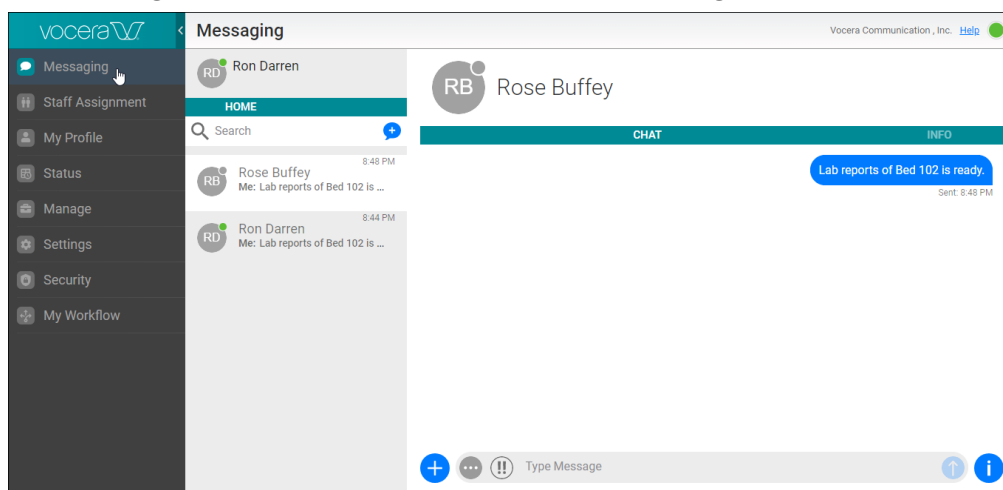
5. Click **Send**.

The message is sent to the Care Team.

6. Navigate to **Messaging** module.

The Messaging page opens and lists the sent messages.

The message sent to the Care Team is displayed along with the timestamp.



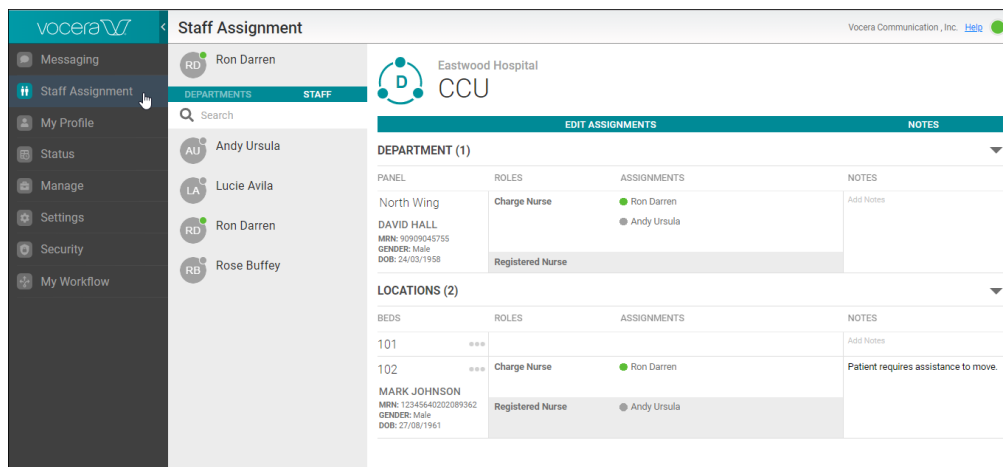
Messaging an individual Staff Member

This topic describes the steps to send a message to an individual staff member.

To send a message to an individual staff member, do the following:

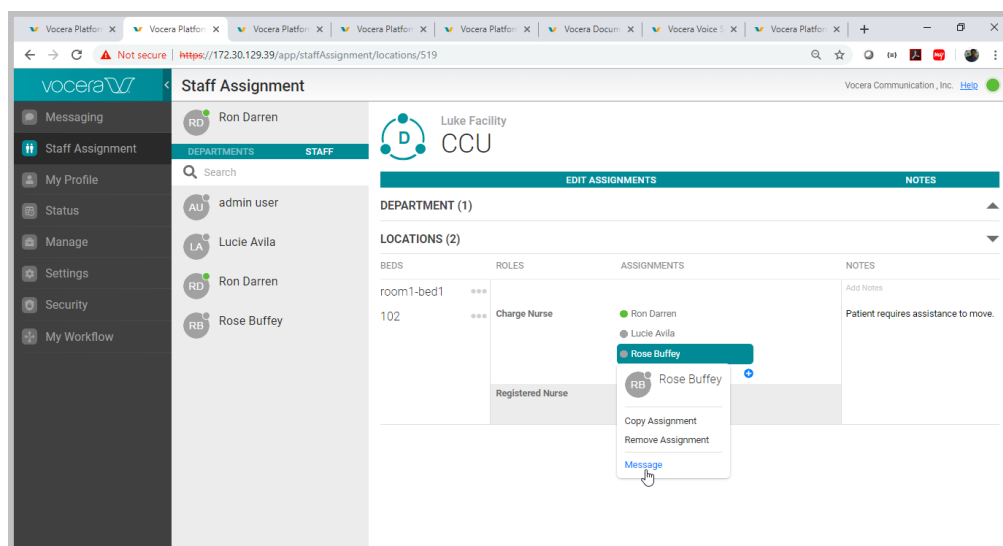
1. Navigate to **Staff Assignment** module.

The Staff Assignment page opens and lists the names of the staff members in the default department.

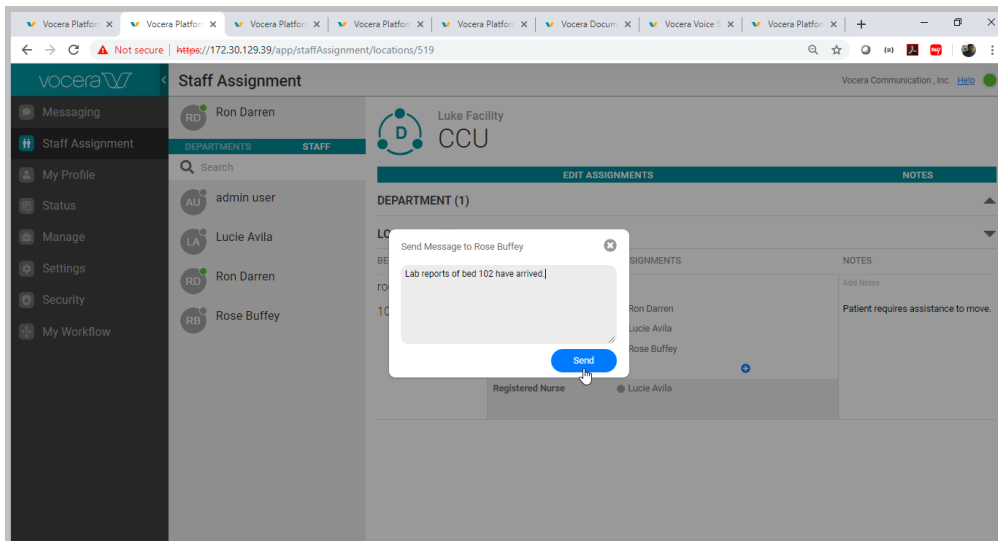


2. In **EDIT ASSIGNMENTS** tab, right click the staff member that you intend to send a message to display the dropdown options. For example, right click **Rose Buffey**.
3. Click **Message** from the dropdown list.

The message dialog box opens.



4. In the message dialog box, enter the message you intend to send to the individual. For example, **Lab reports of Bed 102 have arrived.**



5. Click **Send**.

The message is sent to the recipient.

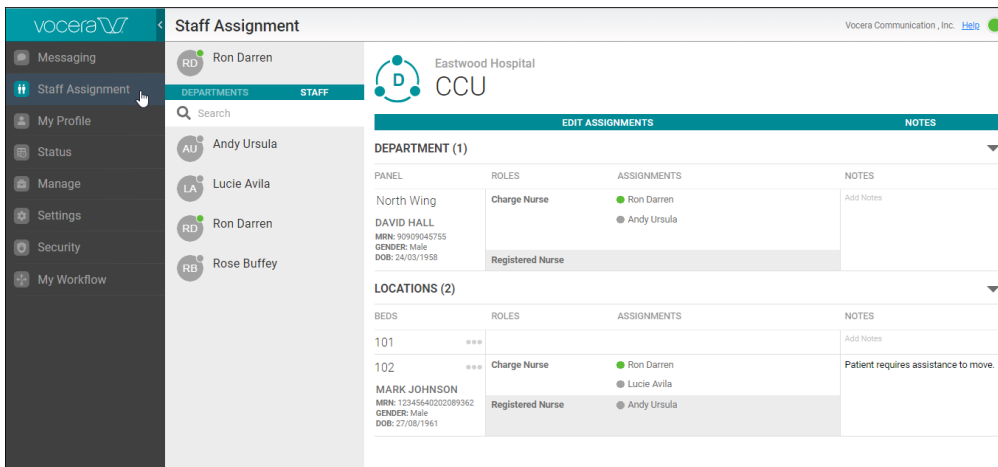
Removing a Staff Assignment

This topic describes the steps to remove staff assignment for an already assigned staff member.

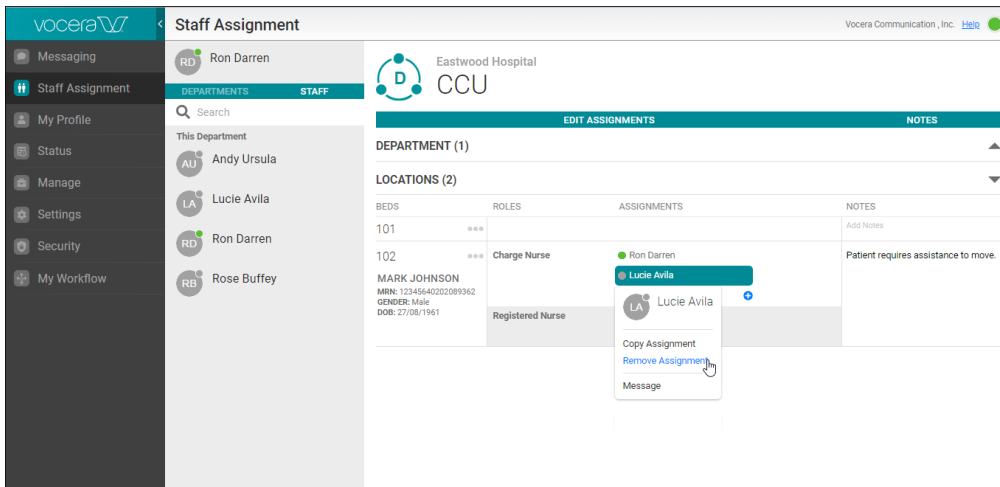
To remove staff assignment role for an assigned staff member, do the following:

1. Navigate to **Staff Assignment** module.

The Staff Assignment page opens and lists the names of the staff members in the default department.



2. In **EDIT ASSIGNMENTS** tab, right click the staff member that you intend to remove staff assignment or select the staff member and click **Delete** on your keypad. For example, right click **Lucie Avila**.



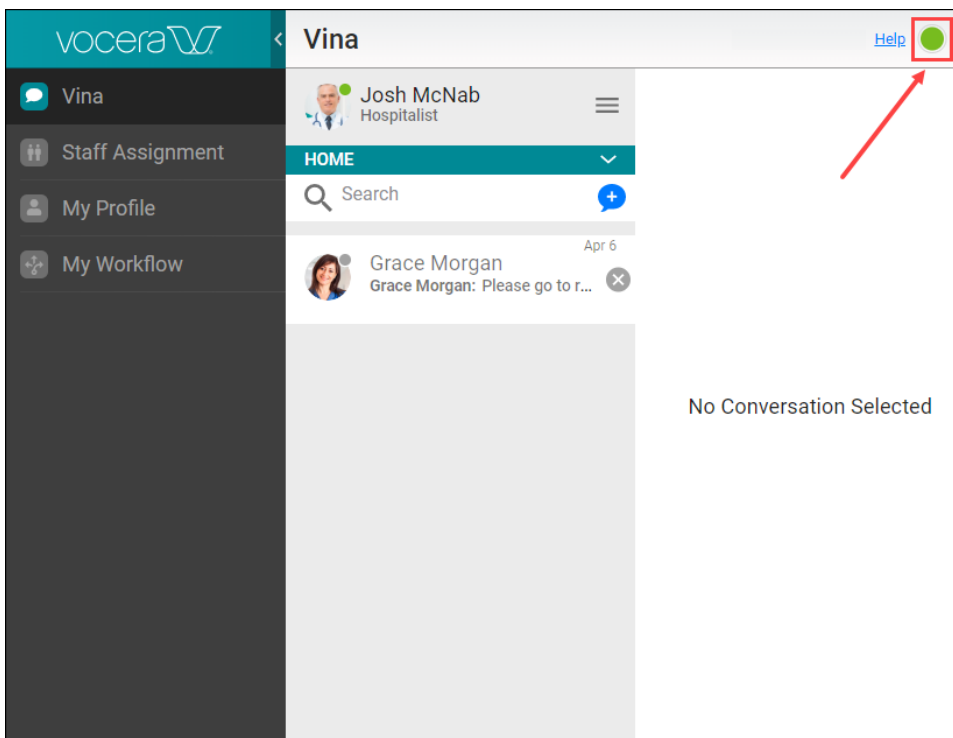
3. Click **Remove Assignment** from the dropdown list.

The staff member, **Lucie Avila**, is removed from the respective assignment.

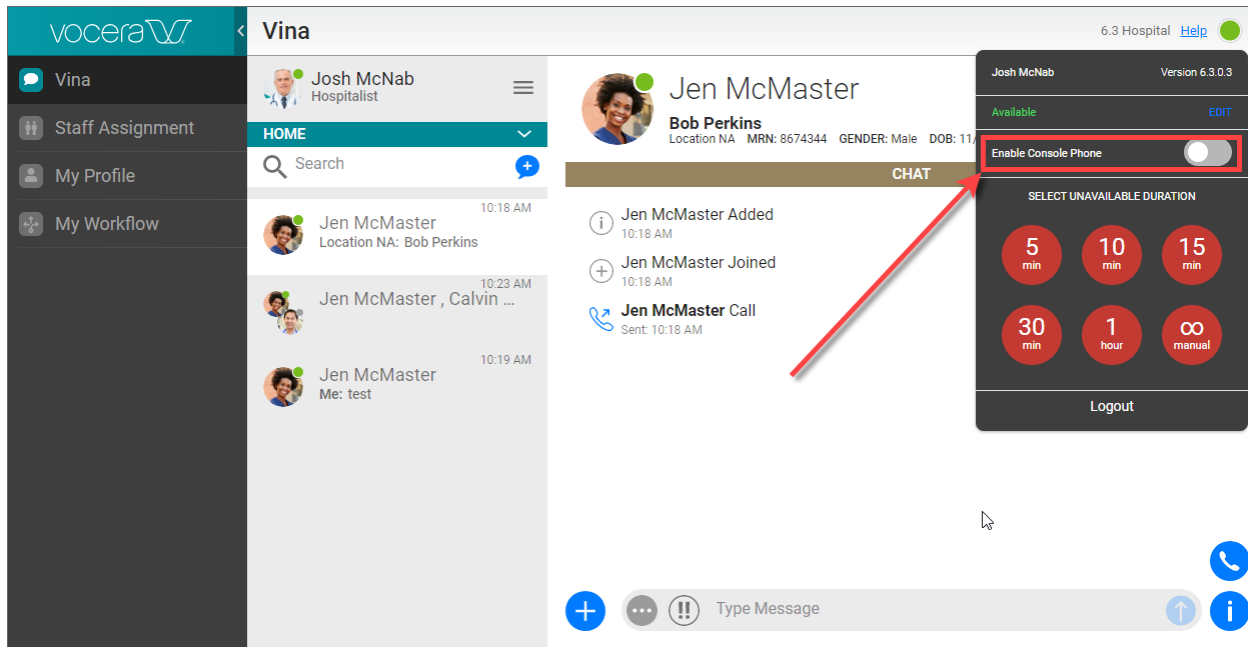
Enabling a Console Phone

If you are logged into Vocera Platform Web Console and are also using a nearby console phone for communication, you can specify that calls are to be initiated using this phone.

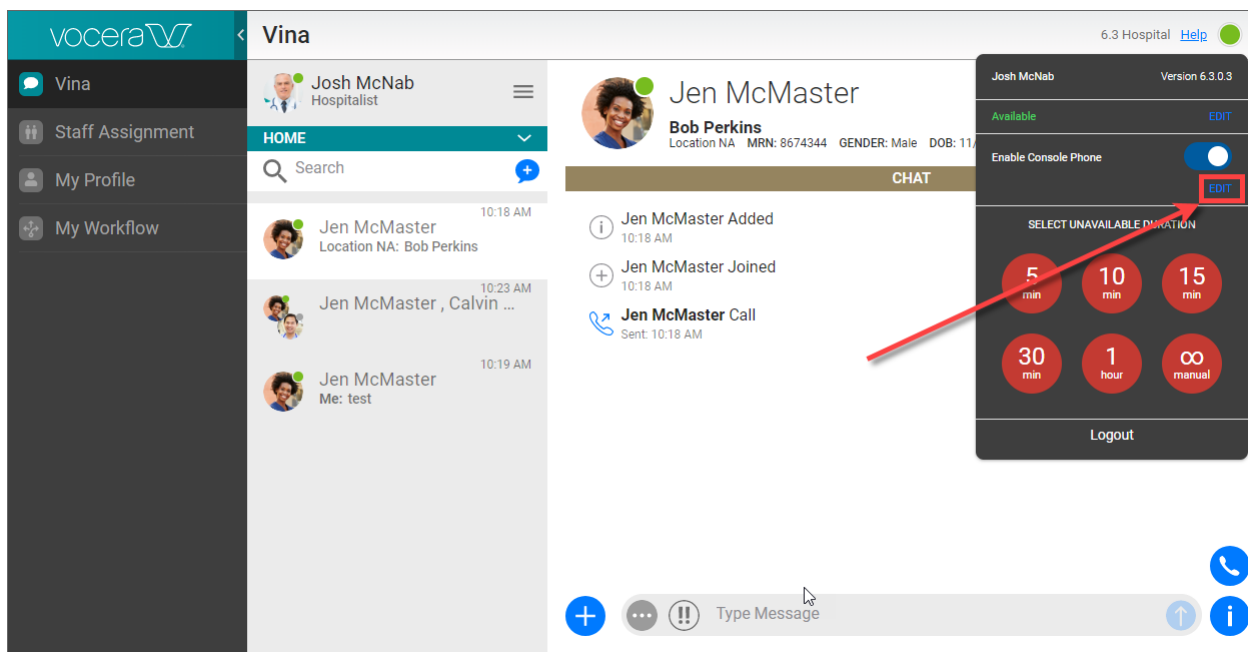
1. Click the presence icon at the top right corner of the Home screen.



2. Toggle **Enable Console Phone**.



3. Click **Edit** and type the extension number or phone number of your console phone. If you have previously specified a console phone number, it reappears.



When you initiate a call from Vocera Platform Web Console, it now originates from your console phone.

Adding Notes for a Patient

This topic describes the steps to add notes specific to a patient.

To add notes for a patient, do the following:

1. Navigate to **Staff Assignment** module.

The Staff Assignment page opens and lists the names of the staff members in the default department.

2. In **EDIT ASSIGNMENTS** tab, under **NOTES** column, locate the **Add Notes** field and enter notes specific for the patient. For example, type **Patient requires assistance to move.**

Calling from Staff Assignment

While using Staff Assignment, you can initiate a call, broadcast, or urgent broadcast to a care team member on the Assignments tab.

You can call from a Vocera device, Vocera Vina app, or a desk phone configured as a console phone. By calling directly from Staff Assignment, you can connect quickly to other users without interacting with the Vocera Genie, which is useful in high noise environments.



Note: Your administrator must grant you the required permissions to initiate calls from Staff Assignment.

To call or broadcast from Staff Assignment, you must be logged in as a Vocera user. For information on calling features, see [Calling Care Team Members](#) on page 27 and [Initiating Broadcast Web Calls](#) on page 28.

If situations when at least one member of your care team is unavailable, that is, their availability status is showing “do not disturb” (DND), you can initiate an urgent broadcast call, see [Initiating an Urgent Broadcast Call](#) on page 29.

You can also use a Desk Phone instead of a Vocera Device for calls from your Staff Assignment Console. You must enable the console phone as described in [Enabling a Console Phone](#) on page 24

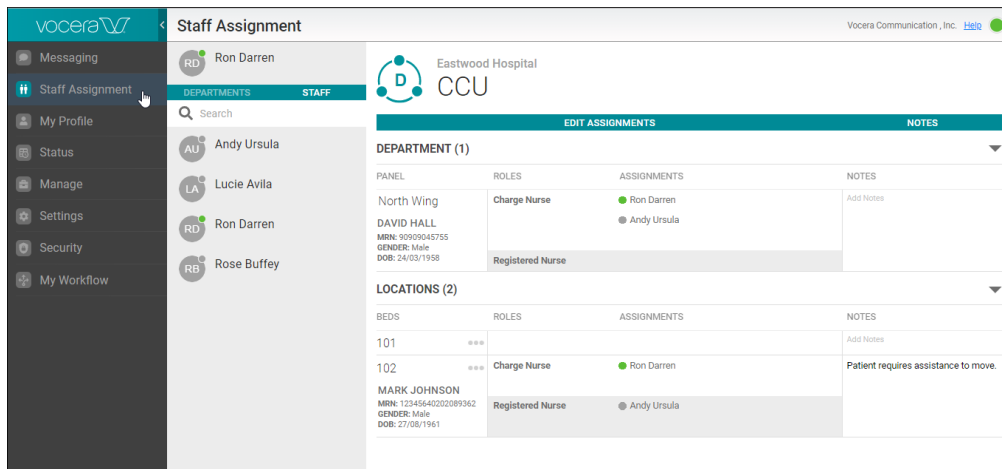
Calling Care Team Members

You can initiate a call from your Staff Assignment console to a care team member.

To initiate a web call, follow these steps:

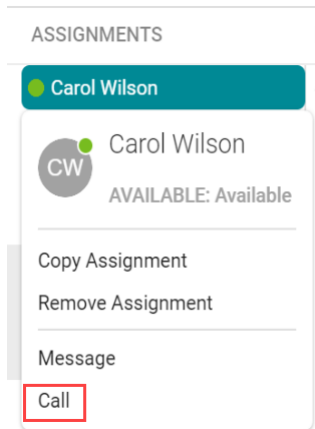
1. Navigate to **Staff Assignment** module.

The Staff Assignment page opens and lists the names of the care team members in the default department.



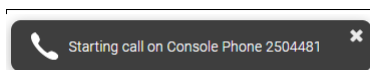
2. In **EDIT ASSIGNMENTS** tab, right click on the name of the care team member that you intend to call and select **Call** from the drop down list.

For example, the following screenshot shows a Call option selected for call the care team member Carol Wilson.

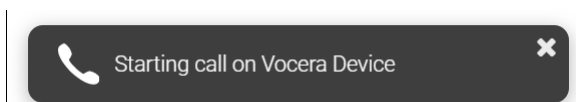


The system initiates the call to the care team member and displays one of the following:

- If a Console phone is enabled and configured as described in [Enabling a Console Phone](#) on page 24, "Starting call on Console Phone <phone number>" pop-up message displays as shown in the following screenshot.



- If a Console phone is not configured, "Starting call on Vocera Device " pop-up message displays as shown in the following screenshot.



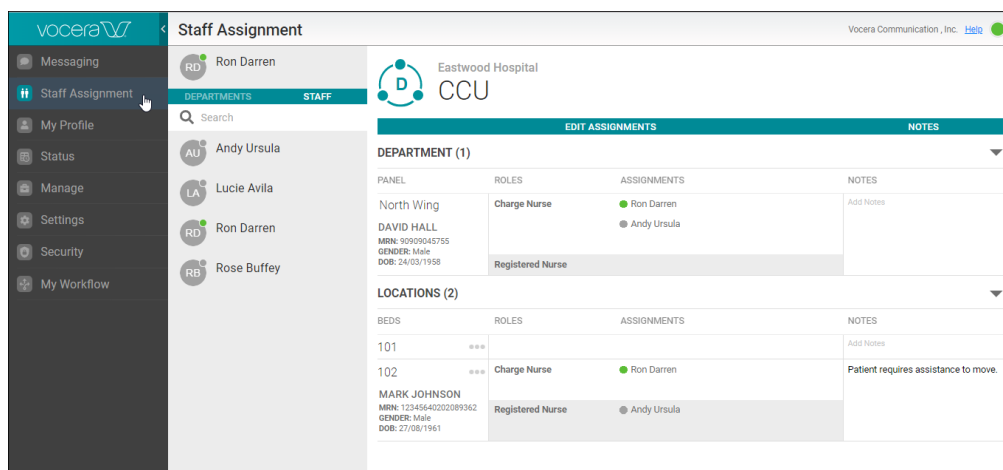
Initiating Broadcast Web Calls

You can initiate a Broadcast call from your Staff Assignment Console to your care team members.

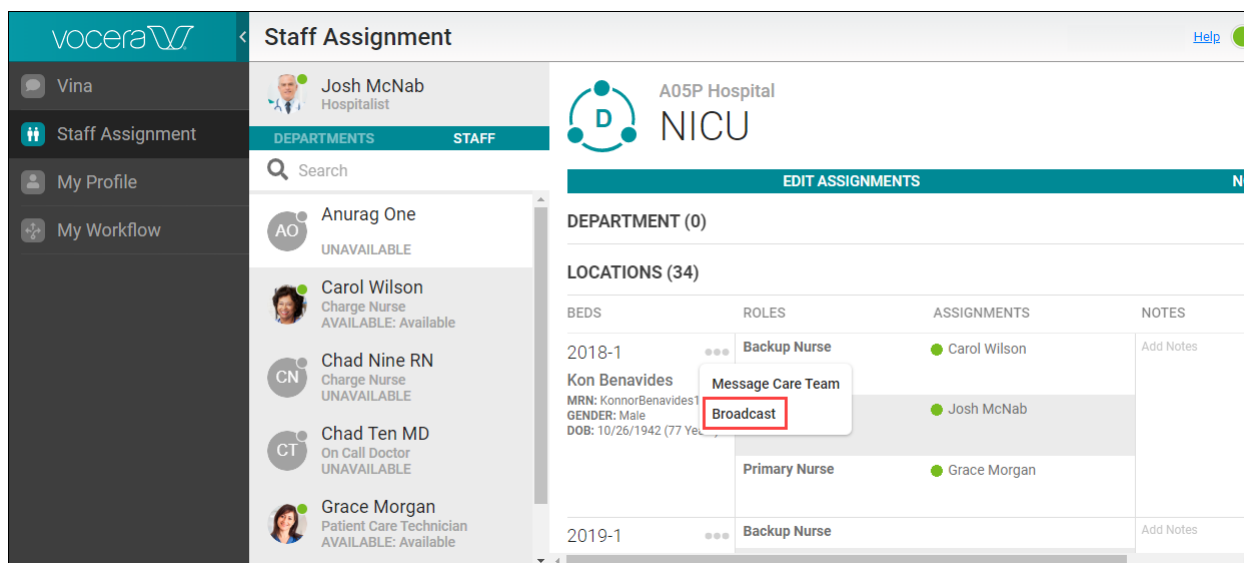
To initiate a broadcast call to your care team members, follow these steps:

1. Navigate to **Staff Assignment** module.

The Staff Assignment page opens and lists the names of the care team members in the default department.



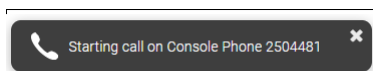
2. In **EDIT ASSIGNMENTS** tab, click the three dots displayed next to the Bed number. The **Broadcast** option is displayed.



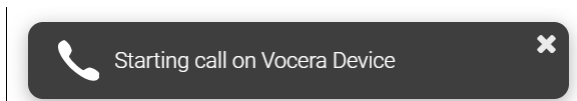
3. Click **Broadcast**.

The broadcast call is initiated and the system displays one of the following:

- If a Console phone is enabled and configured as described in [Enabling a Console Phone](#) on page 24, "Starting call on Console Phone <phone number>" pop-up message displays as shown in the following screenshot.



- If a Console phone is not configured, "Starting call on Vocera Device " pop-up message displays as shown in the following screenshot.



Initiating an Urgent Broadcast Call

You can initiate a Urgent Broadcast call from your Staff Assignment Console to your care team members.

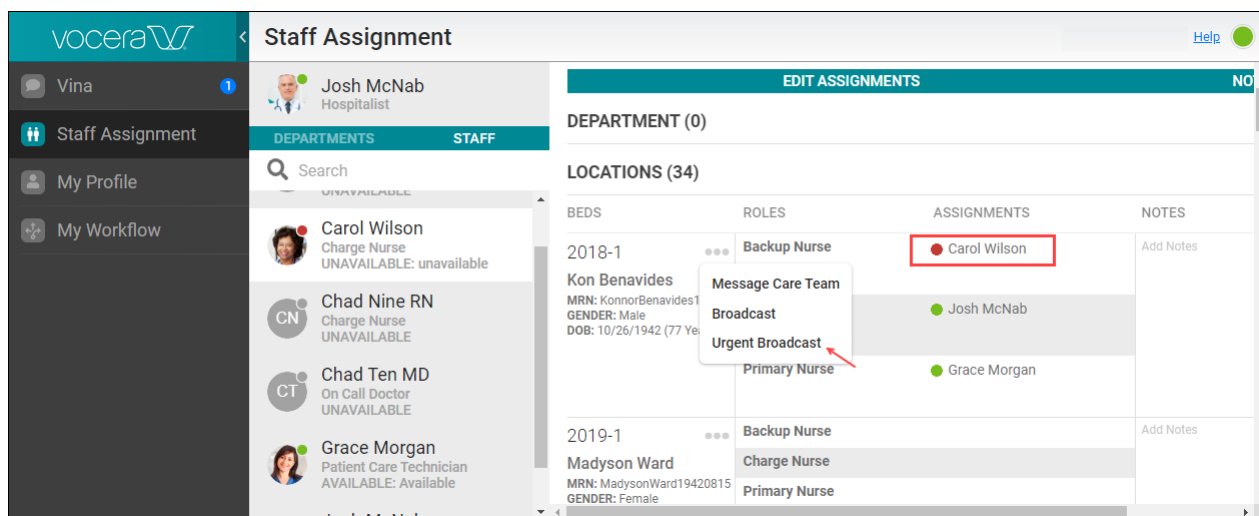
To initiate an urgent broadcast call to your care team members, follow these steps:

1. Navigate to **Staff Assignment** module.

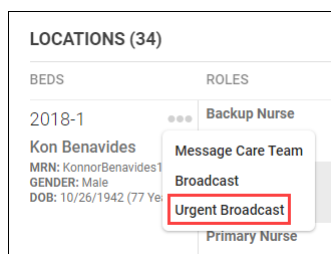
The Staff Assignment page opens and lists the names of the care team members in the default department.

2. In **EDIT ASSIGNMENTS** tab, click the three dots displayed next to the Bed number.

The **Urgent Broadcast** option is displayed if at least one of the care team members is unavailable. For example, the following screenshot shows the presence status of the care team member “Carol Wilson” as unavailable.

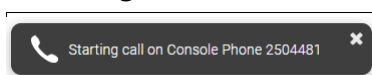


3. Click **Urgent Broadcast**.



The urgent broadcast call is initiated and the system displays one of the following:

- If a Console phone is enabled and configured as described in [Enabling a Console Phone](#) on page 24, “Starting call on Console Phone <phone number>” pop-up message displays as shown in the following screenshot.



- If a Console phone is not configured, “Starting call on Vocera Device ” pop-up message displays as shown in the following screenshot.

