



PatientTouch® Enterprise Manager

User Guide 4.7

November 2019

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November 2019

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PatientSafe Solutions, Inc.

9330 Scranton Rd. Suite 325

San Diego, CA 92121

Phone: (858) 746-3100

Fax: (858) 746-3101

www.patientsafesolutions.com

Welcome to the Enterprise Manager User Guide

The Enterprise Manager is a tool that provides greater flexibility in assigning caregivers and patients. You will use the Enterprise Manager to manage the relationship between the hospital, care role, and the patient.

The Enterprise Manager also allows you to:

1. Create and manage user information/permissions and contacts
2. Manage user extensions
3. Manage Patient and Location Assignments
4. Configure the organization structure, including organization types (i.e. unit) and organization units (i.e. 3rd Floor) across multiple facilities
5. Configure the clinical attributes, including care roles and clinical profiles
6. Manage settings for system security, messaging and voice
7. Manage devices
8. View patient information
9. Establish the relationship between care roles in the Enterprise Manager and roles in the Clinical Manager

Logging In

To log into the Enterprise Manager, complete the following fields:

1. **User:** Enter your user name.
2. **Password:** Enter your password.

Note Your username and password are the same in the Enterprise Manager and the Clinical Manager.

3. Press **Enter** on your keyboard or click **Login**.

patienttouch[®]
enterprise manager

English

PatientSafe Hospital

User:

Required field

Password:

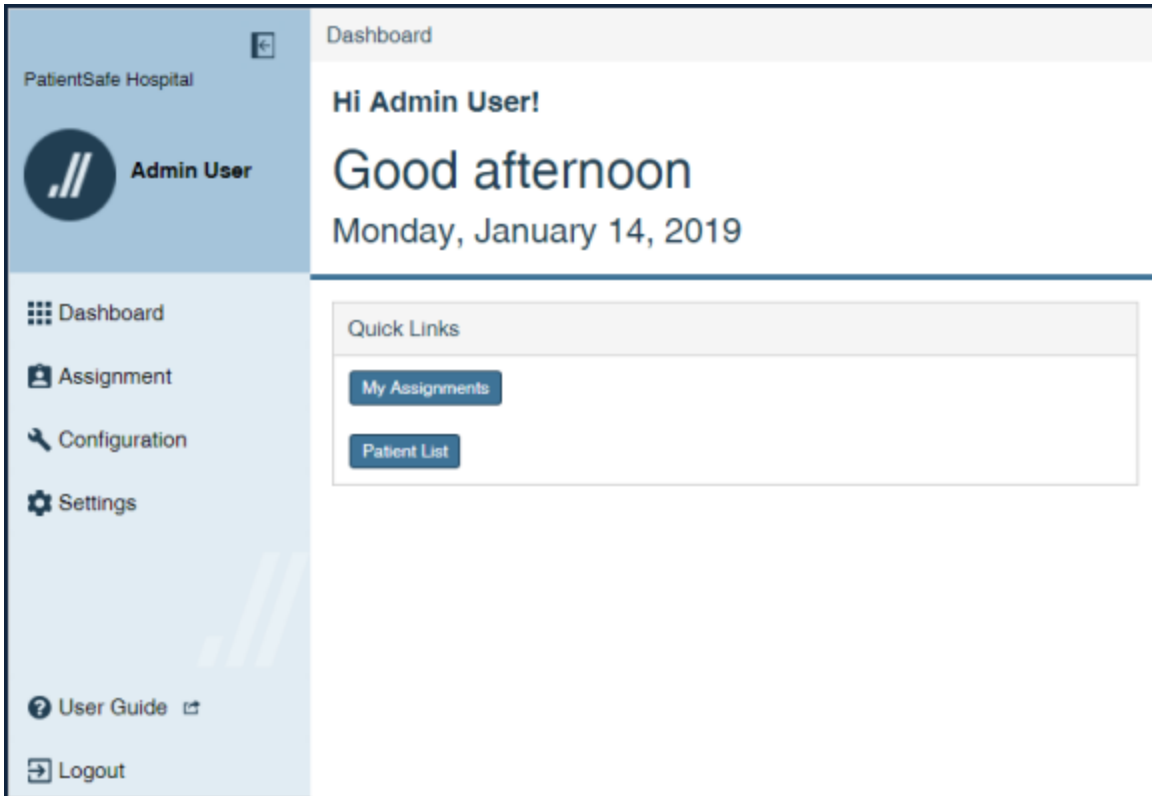
Login

V 4.5.0.0800.2598

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Logging Out

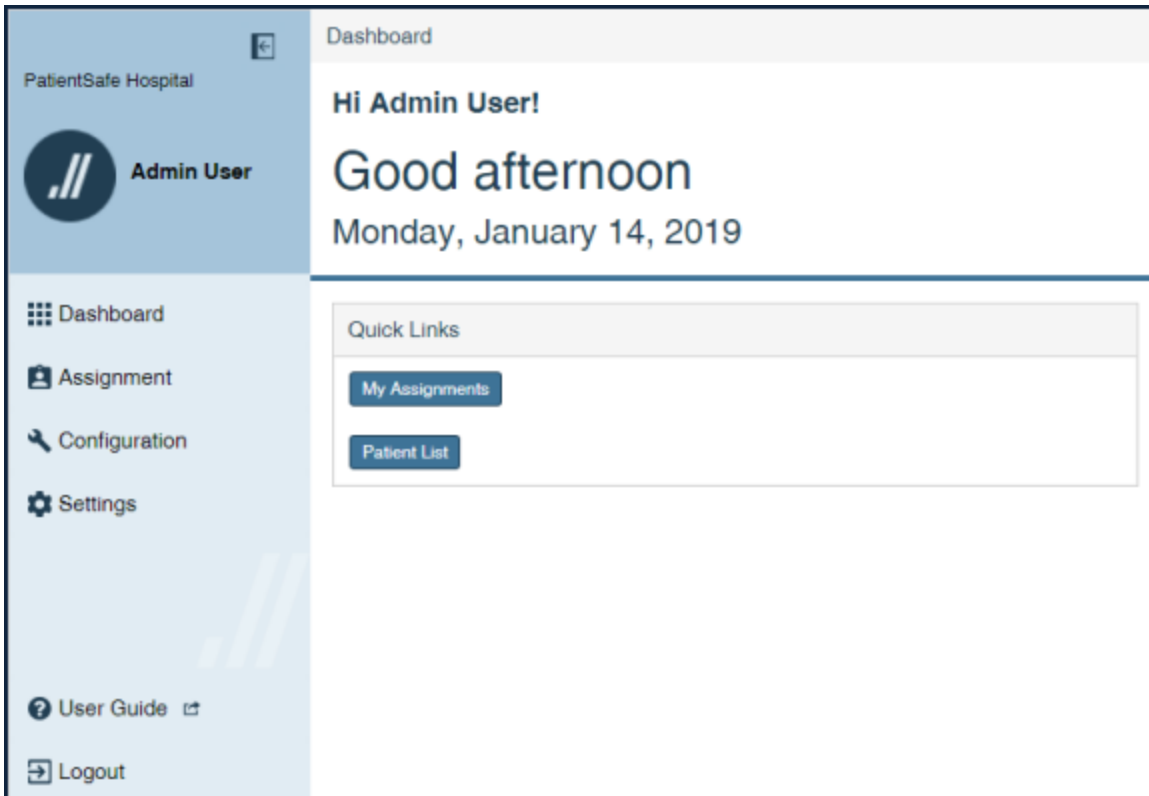
Click **Logout** from the bottom left hand side of the screen to log out of Enterprise Manager.



Dashboard

The Dashboard displays a welcome message for each user with "Hi <username>! Good Morning/Afternoon." The current date displays beneath the welcome message. The name of the hospital displays on the top left hand corner of the screen.

The Dashboard provides quick access to **My Assignments** and the **Patient List**. Click the Dashboard anytime to access these quick links.




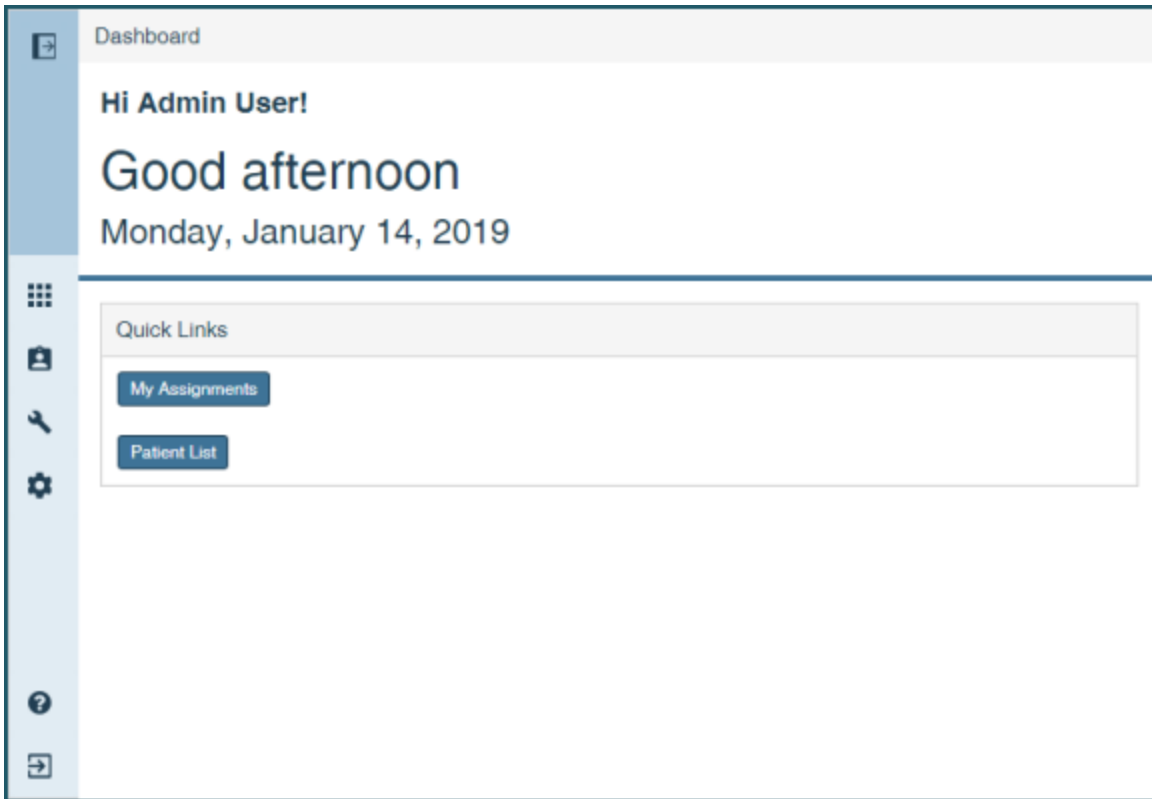
My Assignments displays a list of all of your assignments. Click My Assignments on the Contents tab to the left or click the link below to learn more.

- [My Assignments](#)

The Patient List displays a list of all patients in the Nursing Units that are associated to the logged-in user. Click Patient List on the Contents tab to the left or click the link below to learn more.







- [Patient List](#)

Click the left arrow icon  to minimize the left side bar and enlarge the viewing area of the Enterprise Manager application.



The icons display without the text on the left side bar for navigating the application.

Use the table below to navigate.

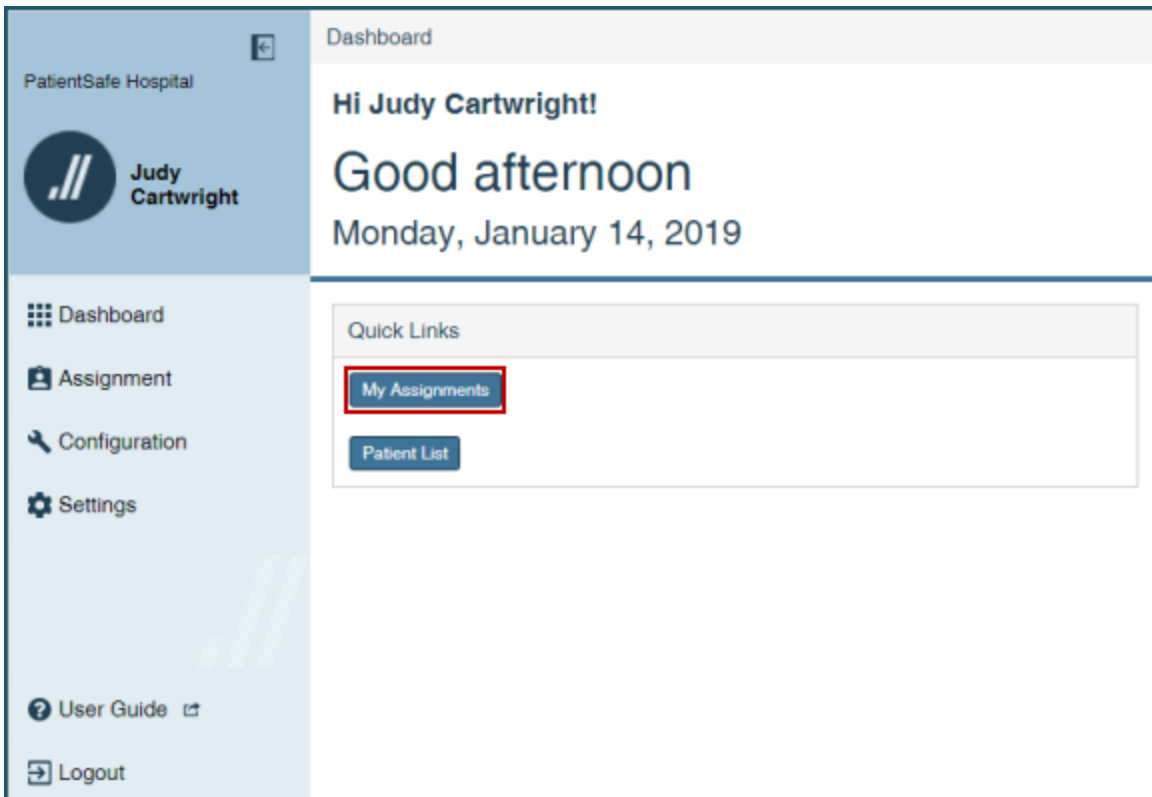
	Dashboard
	Assignment
	Configuration
	Settings
	User Guide
	Logout

Click the arrow icon again to display the left side bar with the text and return the viewing area to its normal size.

My Assignments

Caregivers can assign patients and locations using both the Enterprise Manager and the Clinical Manager.

1. To view and/or edit your assignments, click **My Assignments** from the Dashboard. Or, you may select the Assignment menu>My Assignments.



2. Select the desired facility and care role.
3. Click **Next**.

My Assignments: Select... Facility: PatientSafe Mira Mesa Search by name or description

Name ↑	Assign To	Exclusive per Organization Unit or Patient	Exclusive per Caregiver	Description
Crash Team (role)	Crash Team	No	No	
ED Nurse	ED Zones	No	No	This is a nurse in the e...
OR nurse	Room	No	No	This is a nurse that is st...
Primary Nurse	Patient	Yes	No	
Primary Nurse 2	Patient	No	No	
RN After-Hour	Team	Yes	Yes	

Next

4. Double-click your Nursing Unit.

Assignment: Primary Nurse Facility: PatientSafe Mira Mesa

Patient List: Search

Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Select a Nursing Unit Search by Nursing Unit</p> <p>Nursing Unit ↑</p> <p>10151</p> <p>2-West</p> <p>3RDFLOOR</p> <p>9 WEST</p> <p>CCU</p> <p>ED</p> <p>NICU</p> <p>Page 1 of 1 1 - 8 of 8</p> </div>					

Assign

Patients (0) Org Units (0)

Visit # Care Role

Unassign

Back

5. Click the check box(es) next to the patient(s) name(s) and click **Assign**.

Note To change the **Care Role**, click the **Assignment** drop down menu from the top middle of the screen.

Assignment: **Primary Nurse**
Facility: PatientSafe Mira Mesa

Patient List: **Nursing Unit: 3RDFLOOR**

<input type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input checked="" type="checkbox"/>	4 1	Donkey	Kong	M28004	V28004	Daniel Gonzalez 1
<input type="checkbox"/>	121 2	Frank	Burns	M100006	V100006	Judy Cartwright
<input type="checkbox"/>	124 1	Margaret	Houlihan	M100007	V100007	Judy Cartwright
<input checked="" type="checkbox"/>	1001 1	Jeff	Bezos	M9292	V9292	Blake Fasching
<input type="checkbox"/>	1234 1	Dwight	Schrute	MRN1974	VISIT1...	Judy Cartwright

Assign 2 patient(s): Assign

Current Assignments **Patients (3)** Org Units (3)

<input type="checkbox"/>	Location	Nursing Unit	Last Name	First Name	MRN	Visit #	Care Role
<input type="checkbox"/>	124 1	3RDFLOOR	Houlihan	Margaret	M100007	V100007	Primary N...
<input type="checkbox"/>	121 2	3RDFLOOR	Burns	Frank	M100006	V100006	Primary N...
<input type="checkbox"/>	1234 1	3RDFLOOR	Schrute	Dwight	MRN1974	VISIT1974	Primary N...

Unassign

The assigned patients display under Current Assignments.

Note Be sure that the **Patients** button is selected to see patients. Click **Org Units** to see org units assigned to this caregiver.

Assignment: **Primary Nurse**
Facility: PatientSafe Mira Mesa

Patient List: **Nursing Unit: 3RDFLOOR**

<input type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input type="checkbox"/>	4 1	Donkey	Kong	M28004	V28004	Judy Cartwright
<input type="checkbox"/>	121 2	Frank	Burns	M100006	V100006	Judy Cartwright
<input type="checkbox"/>	124 1	Margaret	Houlihan	M100007	V100007	Judy Cartwright
<input type="checkbox"/>	1001 1	Jeff	Bezos	M9292	V9292	Judy Cartwright
<input type="checkbox"/>	1234 1	Dwight	Schrute	MRN1974	VISIT1...	Judy Cartwright

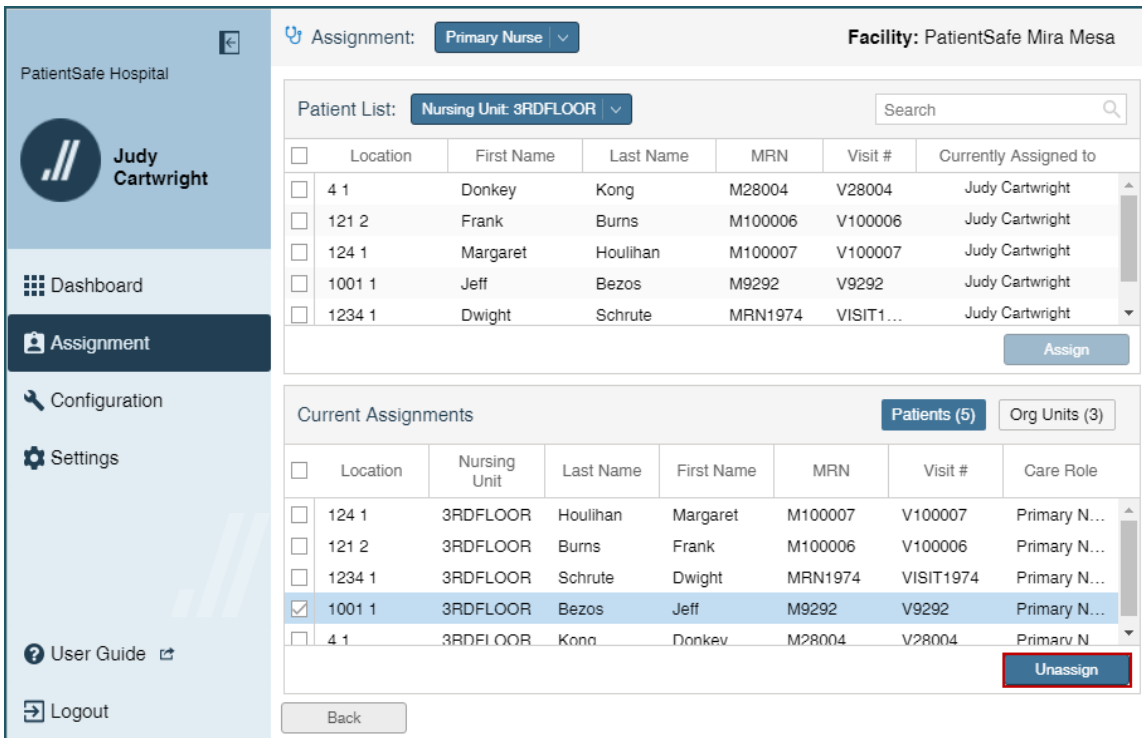
Assign

Current Assignments **Patients (5)** Org Units (3)

<input type="checkbox"/>	Location	Nursing Unit	Last Name	First Name	MRN	Visit #	Care Role
<input type="checkbox"/>	124 1	3RDFLOOR	Houlihan	Margaret	M100007	V100007	Primary N...
<input type="checkbox"/>	121 2	3RDFLOOR	Burns	Frank	M100006	V100006	Primary N...
<input type="checkbox"/>	1234 1	3RDFLOOR	Schrute	Dwight	MRN1974	VISIT1974	Primary N...
<input type="checkbox"/>	1001 1	3RDFLOOR	Bezos	Jeff	M9292	V9292	Primary N...
<input type="checkbox"/>	4 1	3RDFLOOR	Kong	Donkey	M28004	V28004	Primary N...

Unassign

6. To unassign, click the check box next to the patient name and click **Unassign**.



Assignment: **Primary Nurse** Facility: PatientSafe Mira Mesa

Patient List: **Nursing Unit: 3RDFLOOR** Search

<input type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input type="checkbox"/>	4 1	Donkey	Kong	M28004	V28004	Judy Cartwright
<input type="checkbox"/>	121 2	Frank	Burns	M100006	V100006	Judy Cartwright
<input type="checkbox"/>	124 1	Margaret	Houlihan	M100007	V100007	Judy Cartwright
<input type="checkbox"/>	1001 1	Jeff	Bezos	M9292	V9292	Judy Cartwright
<input type="checkbox"/>	1234 1	Dwight	Schrute	MRN1974	VISIT1...	Judy Cartwright

Assign

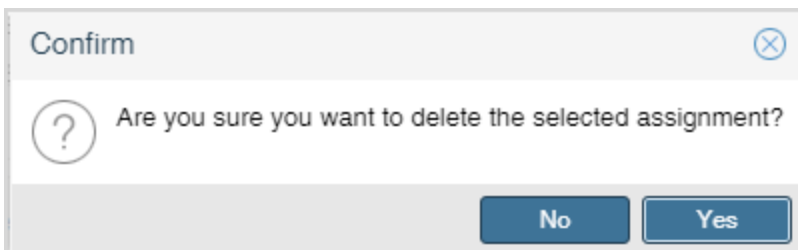
Current Assignments **Patients (5)** Org Units (3)

<input type="checkbox"/>	Location	Nursing Unit	Last Name	First Name	MRN	Visit #	Care Role
<input type="checkbox"/>	124 1	3RDFLOOR	Houlihan	Margaret	M100007	V100007	Primary N...
<input type="checkbox"/>	121 2	3RDFLOOR	Burns	Frank	M100006	V100006	Primary N...
<input type="checkbox"/>	1234 1	3RDFLOOR	Schrute	Dwight	MRN1974	VISIT1974	Primary N...
<input checked="" type="checkbox"/>	1001 1	3RDFLOOR	Bezos	Jeff	M9292	V9292	Primary N...
<input type="checkbox"/>	4 1	3RDFLOOR	Kong	Donkey	M28004	V28004	Primary N...

Unassign

Back

7. Click **Yes** on the confirmation message.



Confirm

Are you sure you want to delete the selected assignment?

No Yes

The patient has been unassigned and removed from the Current Assignments and the number of Patients has decreased.

PatientSafe Hospital

Judy Cartwright

- Dashboard
- Assignment
- Configuration
- Settings
- User Guide
- Logout

Assignment: Primary Nurse
Facility: PatientSafe Mira Mesa

Patient List: Nursing Unit: 3RDFLOOR

<input type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input type="checkbox"/>	4 1	Donkey	Kong	M28004	V28004	Judy Cartwright
<input type="checkbox"/>	121 2	Frank	Burns	M100006	V100006	Judy Cartwright
<input type="checkbox"/>	124 1	Margaret	Houlihan	M100007	V100007	Judy Cartwright
<input type="checkbox"/>	1001 1	Jeff	Bezos	M9292	V9292	
<input type="checkbox"/>	1234 1	Dwight	Schrute	MRN1974	VISIT1...	Judy Cartwright

Assign

Current Assignments Patients (4) Org Units (3)

<input type="checkbox"/>	Location	Nursing Unit	Last Name	First Name	MRN	Visit #	Care Role
<input type="checkbox"/>	124 1	3RDFLOOR	Houlihan	Margaret	M100007	V100007	Primary N...
<input type="checkbox"/>	121 2	3RDFLOOR	Burns	Frank	M100006	V100006	Primary N...
<input type="checkbox"/>	1234 1	3RDFLOOR	Schrute	Dwight	MRN1974	VISIT1974	Primary N...
<input type="checkbox"/>	4 1	3RDFLOOR	Kong	Donkey	M28004	V28004	Primary N...

Unassign

Restrict Assignments

Care Roles have the ability to be "restricted" so that the assignments for the care role cannot be modified when they are using an on-call scheduling system.

The functionality of Assignments will differ, if one or more care roles have the "Restrict Assignment Management" selected in the Enterprise Manager.

If you select the Care Role with the Restrict Assignment, you will not be able to modify assignments for that Care Role.

On the **My Assignments** screen, the care role will be in italics as shown below.

PatientSafe Hospital

Hanna Arlington

- Dashboard
- Assignment
- Configuration
- Settings
- User Guide
- Logout

My Assignments: Select... Facility: University Hospital Search by name or description

Name ↑	Assign To	Exclusive per Organization Unit or Patient	Exclusive per Caregiver	Description
Primary Nurse 2	Patient	No	No	

Next

If you try to assign a patient, the **Assign** button will be grayed out (not active).

PatientSafe Hospital

Hanna Arlington

- Dashboard
- Assignment
- Configuration
- Settings
- User Guide
- Logout

Assignment: Primary Nurse 2 (Assignment Restricted) Facility: University Hospital

Patient List: Nursing Unit: 13 EAST Search

<input checked="" type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input checked="" type="checkbox"/>	101 1	Tom	Jones	M10003	V10003	

Assign 1 patient(s): Assign

Current Assignments Patients (0) Org Units (0)

<input type="checkbox"/>	Location	Nursing Unit	Last Name	First Name	MRN	Visit #	Care Role

Unassign

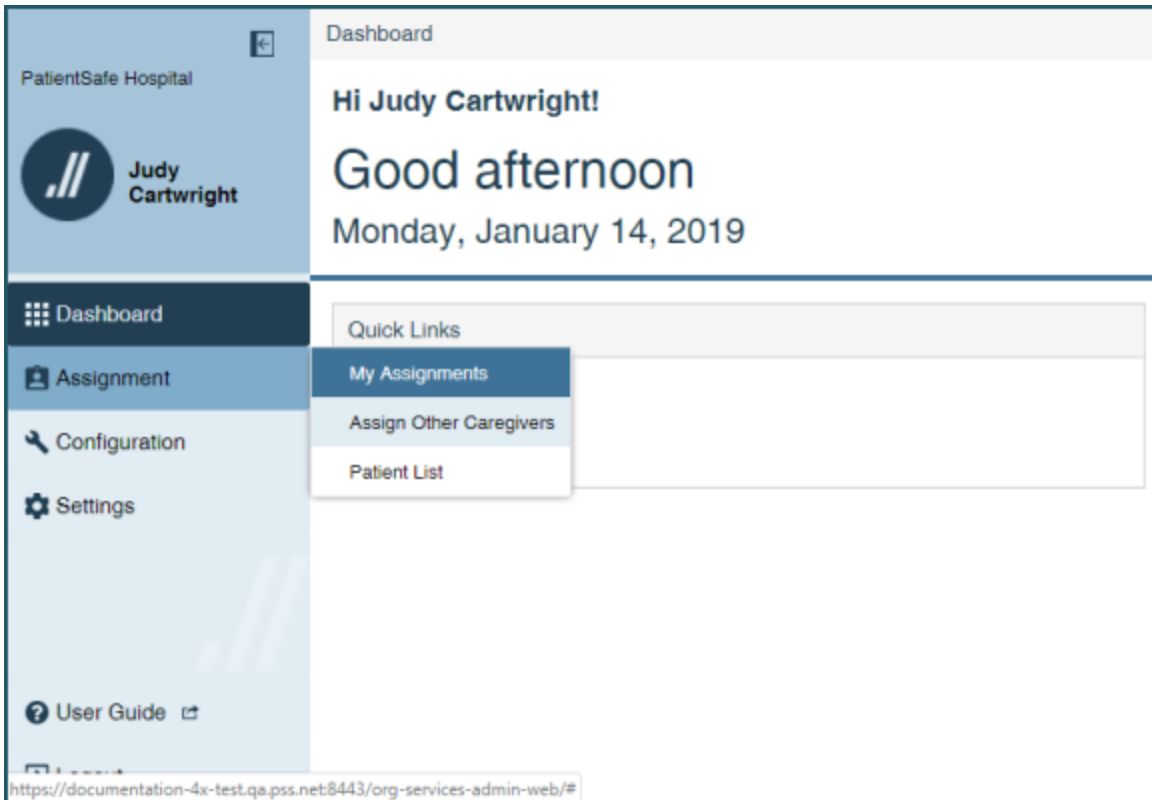
Back

Assign Other Caregivers

Caregivers can assign patients and locations using both the Enterprise Manager and the Clinical Manager.

When using the Enterprise Manager, you must have the appropriate privileges under your User Account in order to complete the task.

1. Click Assignment>Assign Other Caregivers.



2. Select a facility and care role. You can select the care role and click **Next**, or, you can just double-click the care role.

Assign Other Caregiver... Facility: PatientSafe Mira Mesa

Name ↑	Assign To	Exclusive per Organization Unit or Patient	Exclusive per Caregiver	Description
On Call Oncologist	Facility	No	No	This is an oncologist s...
On Call Orthopedics	Facility	No	No	This is an orthopedic p...
OR nurse	Room	No	No	This is a nurse that is s...
outside	unknown	No	No	
Pharmacist	Bed	Yes	No	This is a pharmacist for...
Physician	Patient	Yes	No	This is the attending ph...
Primary Nurse	Patient	Yes	No	
Primary Nurse 2	Patient	No	No	
Radiology On Call	Hospital Serv...	No	No	
Resident	Nursing Unit	No	No	This is a resident physi...
Respiratory Therapist	Bed	No	No	This is the RT for a loc...
RN After-Hour	Team	Yes	Yes	
Satellite Pharmacist	Satellite	No	No	
Speech Therapist	Patient	No	No	This is the speech ther...
Team Nurse	Team	No	Yes	
Unit Phlebotomist	Nursing Unit	No	No	This is the phlebotomis...
Unit PT	Nursing Unit	No	No	This is the Physical Th...

3. Select a Nursing Unit by double-clicking the unit.

Assignment: Primary Nurse Facility: PatientSafe Mira Mesa

Ca... Search Patient List: Search

3RDFLOOR

Page 1 of 2 1 - 25 of 42

4. Search for the caregiver using the Search field.

Note Click **Recents** to display the recently assigned caregiver and time of last assignment for this care role.

Assignment: Primary Nurse Facility: PatientSafe Mira Mesa

Ca... li

Assignment: Primary Nurse Facility: PatientSafe Mira Mesa

Patient List: Nursing Unit: 3RDFLOOR

Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input type="checkbox"/> 4 1	Donkey	Kong	M28...	V2...	Judy Cartwright
<input type="checkbox"/> 121 2	Frank	Burns	M10...	V1...	Judy Cartwright
<input type="checkbox"/> 124 1	Margaret	Houlihan	M10...	V1...	Judy Cartwright
<input type="checkbox"/> 1001 1	Jeff	Bezos	M9292	V9...	

Assign

Current Assignments Patients (0) Org Units (0)

Locat...	Nursing Unit	Last Name	First Name	MRN	Visit #	Care Role

Unassign

5. Select the caregiver for whom you want to assign a patient.
6. Select the check box(es) next to the patient(s) and click **Assign**.

Assignment: Primary Nurse Facility: PatientSafe Mira Mesa

Ca... li

Assignment: Primary Nurse Facility: PatientSafe Mira Mesa

Patient List: Nursing Unit: 3RDFLOOR

Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input type="checkbox"/> 4 1	Donkey	Kong	M28...	V2...	Judy Cartwright
<input checked="" type="checkbox"/> 121 2	Frank	Burns	M10...	V1...	Judy Cartwright
<input checked="" type="checkbox"/> 124 1	Margaret	Houlihan	M10...	V1...	Judy Cartwright
<input type="checkbox"/> 1001 1	Jeff	Bezos	M9292	V9...	

Assign 2 patient(s) to Linda Abernathy: Assign

Current Assignments Patients (0) Org Units (1)

Locat...	Nursing Unit	Last Name	First Name	MRN	Visit #	Care Role

Unassign

The assigned patients display on the bottom under Current Assignments, and the number of Patients has increased.

The screenshot shows the PatientTouch Enterprise Manager interface. On the left is a navigation sidebar with options like Dashboard, Assignment, Configuration, Settings, User Guide, and Logout. The main area is titled 'Assignment: Primary Nurse' and 'Facility: PatientSafe Mira Mesa'. It features a search bar for 'Ca...' and a 'Patient List' table. Below the patient list is a 'Current Assignments' section, which is highlighted with a red box. This section shows two patients assigned to the Primary Nurse role.

Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input type="checkbox"/> 4 1	Donkey	Kong	M28...	V2...	Judy Cartwright
<input type="checkbox"/> 121 2	Frank	Burns	M10...	V1...	Linda Abernath
<input type="checkbox"/> 124 1	Margaret	Houlihan	M10...	V1...	Linda Abernath
<input type="checkbox"/> 1001 1	Jeff	Bezos	M9292	V9...	

Locat...	Nursing Unit	Last Name	First Name	MRN	Visit #	Care Role
<input type="checkbox"/> 121 2	3RDF...	Burns	Frank	M100...	V100...	Prima...
<input type="checkbox"/> 124 1	3RDF...	Houli...	Marg...	M100...	V100...	Prima...

- To unassign, select the check box next to the patient(s) and click **Unassign**.
- Click **Yes** on the confirmation dialog box.

Note All of the assignments made via Enterprise Manager are visible in the PatientTouch Clinical Manager.

Restrict Assignments

Care Roles have the ability to be "restricted" so that the assignments for the care role cannot be modified when they are using an on-call scheduling system.

The functionality of Assignments will differ, if one or more care roles have the "Restrict Assignment Management" selected in the Enterprise Manager.

If you select the Care Role with the Restrict Assignment, you will not be able to modify assignments for that Care Role.

On the **Assign Other Caregivers** screen, the care role will be in italics as shown below.

PatientSafe Hospital

Hanna Arlington

- Dashboard
- Assignment
- Configuration
- Settings
- User Guide
- Logout

Assign Other Caregiver... Facility: University Hospital

Name ↑	Assign To	Exclusive per Organization Unit or Patient	Exclusive per Caregiver	Description
Consulting Anesthesiol...	Patient	No	No	This is an Anesthesiolo...
Primary Nurse	Patient	Yes	No	
Primary Nurse 2	Patient	No	No	

Next

If you try to assign a patient, the **Assign** button will be grayed out (not active).

PatientSafe Hospital

Hanna Arlington

- Dashboard
- Assignment
- Configuration
- Settings
- User Guide
- Logout

Assignment: Primary Nurse 2 (Assignment Restricted) Facility: University Hospital

Ca...

All Recents

Caregiver	Assign...
Hanna Arlin...	

Back

Patient List: Nursing Unit: 13 EAST

<input type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input checked="" type="checkbox"/>	101 1	Tom	Jones	M10...	V1...	

Assign

Current Assignments Patients (0) Org Units (0)

<input type="checkbox"/>	Locat...	Nursing Unit	Last Name	First Name	MRN	Visit #	Care Role

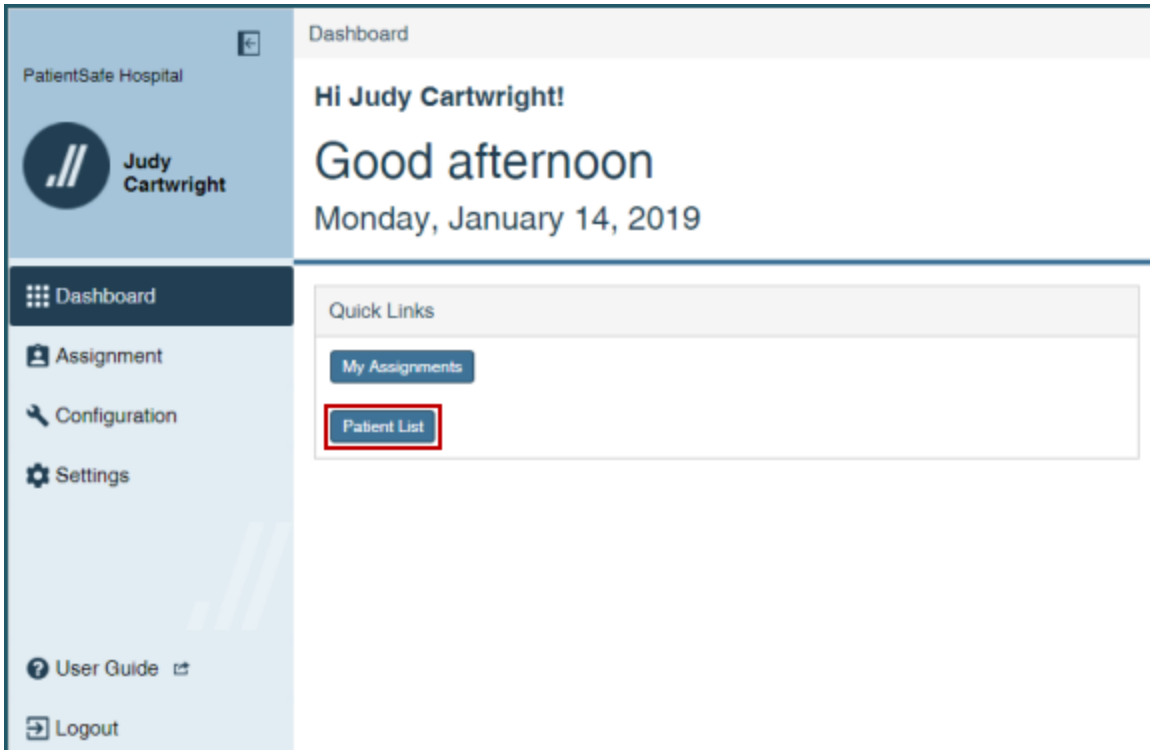
Unassign

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Patient List

1. To view your patients, click **Patient List** from the Dashboard. Or, you may click the Assignment menu>Patient List.



The **Patient List** defaults to display a list of your assigned patients.

PatientSafe Hospital








Judy Cartwright

- Dashboard
- Assignment
- Configuration
- Settings
- User Guide
- Logout

Facility PatientSafe Mira Mesa
Search
in (all fields)

My Patients
 All Patients

 Show Inactive

Last Name	First Name	DOB	EMPI	MRN	Visit #	Facility Name	Nur... Unit	Locati...	Details
Burns	Frank	09/28...		M10...	V10...	PatientS...	3RD...	121 2	
Houlihan	Margaret	09/28...		M10...	V10...	PatientS...	3RD...	124 1	
Bezos	Jeff	09/28...		M9292	V9292	PatientS...	3RD...	1001 1	
Kong	Donkey	09/28...		M28...	V28...	PatientS...	3RD...	4 1	
Schrute	Dwight	09/28...		MR...	VISL...	PatientS...	3RD...	1234 1	

Page 1 of 1

1 - 5 of 5

2. To see patients within a specific facility select the facility from the drop down list. Or, select All to see patients in all facilities.
3. To see a list of all patients, including active, inactive (no activity for 40 days or more), or discharged, click the **Show Inactive** check box. Inactive and discharged patients display in gray italic font.

PatientSafe Hospital

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Facility: PatientSafe Mira Mesa

Search: in (all fields)

My Patients All Patients Show Inactive

Last Name	First Name	DOB	EMPI	MRN	Visit #	Facility Name	Nur... Unit	Locat...	Details
Williams	Robert	09/09...		MP...	VP1...	PatientS...	10151	304 1	
Smith	John	09/28...		MM1	VV1	PatientS...	3R...	1001 1	
Schrute	Dwight	09/28...		MR...	VISI...	PatientS...	3R...	1234 1	
Eleven	Patient	09/28...		MR...	VISI...	PatientS...	3R...	11 1	
Ten	Patient	09/28...		MR...	VISI...	PatientS...	3R...	C10 1	
Kong	Donkey	09/28...		M28...	V28...	PatientS...	3R...	4 1	
Swanson	Ron	09/28...		M99...	V9902	PatientS...	3R...	4 1	
Two	Patient	09/28...		MRN2	VISI...	PatientS...	3R...	2 1	
Zohreh	Patient	09/28...		MRNZ	VISI...	PatientS...	3R...	Z2 1	
Patient	zozo	09/28...		MR...	VISI...	PatientS...	3R...	Z1 1	
Body	Some	09/28...	11111	mm...	11111	PatientS...	3R...	4 1	
One	Patient	09/28...	2345	MRN1	VISI...	PatientS...	3R...	T1 1	
Patient1	Zohreh	09/28...		MR...	VISI...	PatientS...	3R...	P1 1	
Patient1	Zohreh	09/28...		MR...	VISI...	PatientS...	3R...	P1 1	
Patient2	Zohreh	09/28...		MR...	VISI...	PatientS...	3R...	P2 1	
Mola	Lola	09/28...		MR...	VISI...	PatientS...	3R...	P3 1	

Page 1 of 3 | 1 - 25 of 57

4. If there is more than one screen of the Patient List, arrows will display at the bottom of the screen. Click the single right arrow to navigate to the next screen. Click the double right arrows to navigate to the end screen.
5. Click the gray arrow to the right of each field to display the list in ascending or descending order. For example, click Last Name to display the list in ascending or descending order by the patient's last name.
6. Enter your keywords in the Search field to search for a specific patient. Search will search First Name, Last Name, MRN, Visit ID, Hospital Nursing Unit, Room, Bed.
7. The Enterprise Manager allows those with the appropriate permissions to manually edit the patient admit and discharge dates. Double-click the patient name and click the Calendar icon to make your edits.

PatientSafe Hospital

Judy Cartwright

- [Dashboard](#)
- [Assignment](#)
- [Configuration](#)
- [Settings](#)
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←
Patient - Burns, Frank

Patient

Name:	Burns, Frank	Gender:	Male
DOB:	09/28/1956	EMPI:	n/a
MRN:	M100006		

Visit Information

Visit ID	MRN	Facility	
V100006	M100006	PatientSafe Mira ...	07/25

V100006 Details

Diagnoses:	Location:
Allergies: Lipitor [1987-12-16]	Nursing Unit:
Height: 172.7 cm (68 in)	Facility:
Weight: 99.8 kg (220 lb)	BMI:
Admitted: 2018-07-25 at 10:41	Discharged: at

October 2018

S	M	T	W	T	F	S
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Today

Back

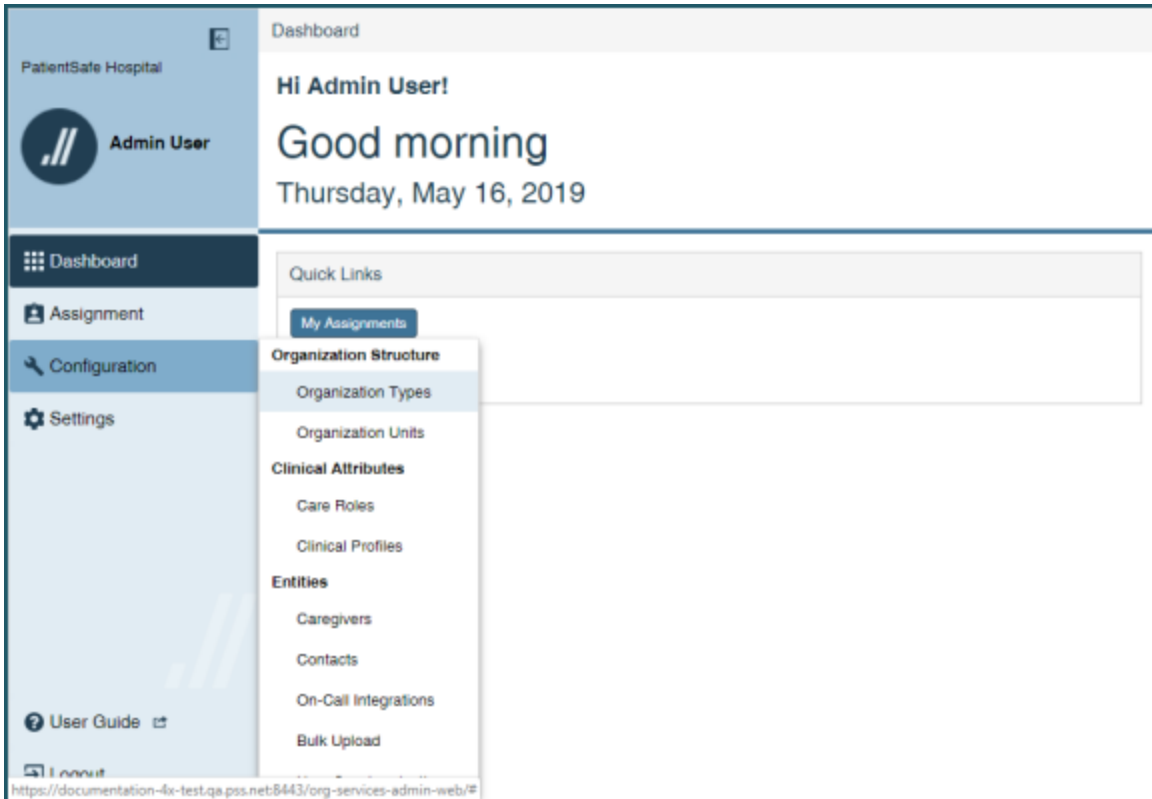
8. Click **Save** to save your changes.

Organization Unit Types

Organization Unit Types can be a physical location such as a campus, facility, room/bed or piece of equipment. However, it can also be a non-physical location such as a team or nursing unit.

Viewing Existing Organization Unit Types

1. From the Dashboard, click Configuration>Organization Types.



2. A full list of existing Organization Unit Types displays with the Name, Description, and Parents, as well as the option to Edit or Delete an individual Organization Unit Type.
3. Expand or Collapse individual items by clicking the small down arrow next to the name of the Organization Unit Type.
4. Sort Name and Description in either Ascending or Descending order by clicking the small up/down arrow to the right of each field.

PatientSafe Hospital

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Organization Types

Name ↑	Description	Parents	Edit	Delete
> Crash Team				
▼ Facility				
▼ Floor	This is the floor of a hospital	⊕ 1		
> Nursi...		⊕ 5		
Hospital ...		⊕ 1		
▼ Nursing ...		⊕ 5		
Bed		⊕ 2		
▼ ED Zo...	This includes the zones in the Emergency Department.	⊕ 1		
> Ro...		⊕ 2		
▼ Room		⊕ 2		
Bed		⊕ 2		
▼ Satellite		⊕ 1		
> Nursi...		⊕ 5		
▼ Team		⊕ 1		
> Nursi...		⊕ 5		
new type				

Refresh
Create New

Creating A New Organization Unit Type

1. To create a new Organization Unit Type click **Create New**.

PatientSafe Hospital

Admin User

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Configuration

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Organization Types

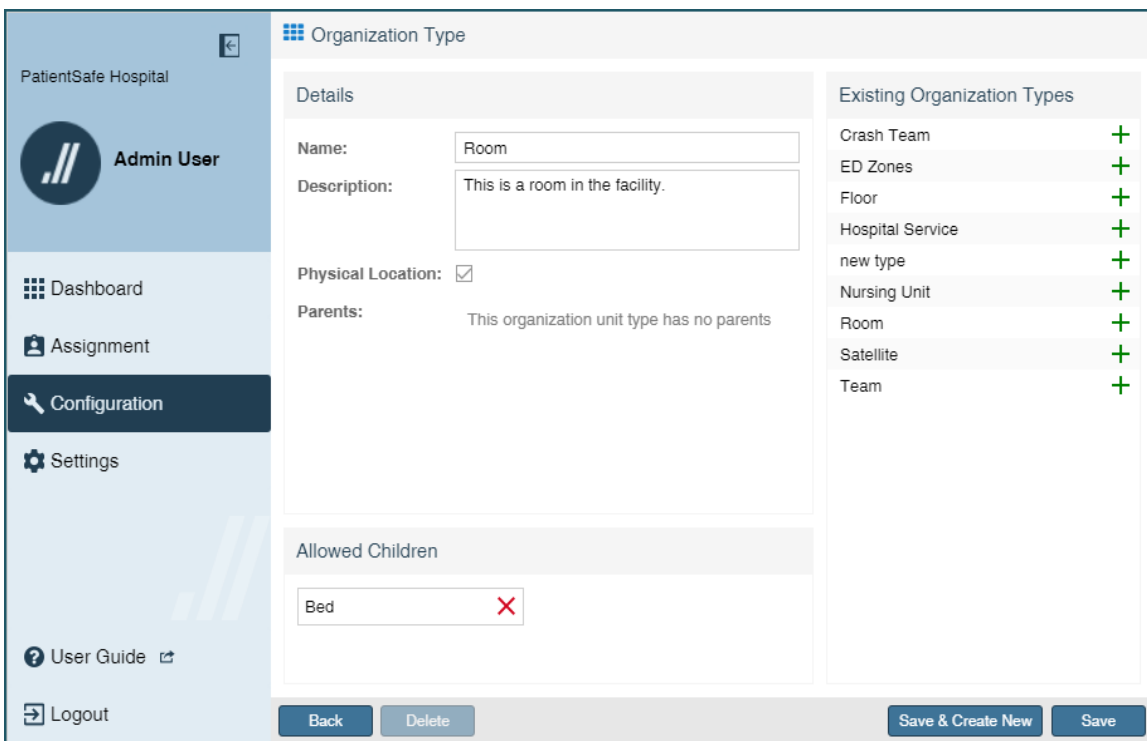
Name ↑	Description	Parents	Edit	Delete
> Crash Team				
▼ Facility				
▼ Floor	This is the floor of a hospital	⊕ 1		
> Nursi...		⊕ 5		
Hospital ...		⊕ 1		
▼ Nursing ...		⊕ 5		
Bed		⊕ 2		
▼ ED Zo...	This includes the zones in the Emergency Department.	⊕ 1		
> Ro...		⊕ 2		
▼ Room		⊕ 2		
Bed		⊕ 2		
▼ Satellite		⊕ 1		
> Nursi...		⊕ 5		
▼ Team		⊕ 1		
> Nursi...		⊕ 5		
new type				

Refresh
Create New

Details

Complete the following fields:

2. Name (required)
3. Description (optional)
4. Physical Location. Check this box if it is a physical location.
5. Parents (if applicable).
6. Allowed Children. The Allowed Children are selected from the existing list located on the right hand side of the screen. Click the green plus sign next to one or more of the existing organization types to add allowed children.



Organization Type

Details

Name:

Description:

Physical Location:

Parents: This organization unit type has no parents

Existing Organization Types

Crash Team	+
ED Zones	+
Floor	+
Hospital Service	+
new type	+
Nursing Unit	+
Room	+
Satellite	+
Team	+

Allowed Children


✖

Buttons: Back, Delete, Save & Create New, Save

Saving Newly Created Organizational Types

1. If you have more than one Organization Unit Type to create, click **Save & Create New** to save your current Organization Unit Type and prepare to enter the next one.
2. If you have finished creating your new Organization Unit Type, click **Save**.
3. Click the **Back** button at any time to return to the previous screen. If you have entered any information, you will receive a message asking if you want to save.

PatientSafe Hospital



Admin User

- Dashboard
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- Logout

Organization Type

Details

Name:

Description:

Physical Location:

Parents: This organization unit type has no parents

Allowed Children

✗

Existing Organization Types

Crash Team	+
ED Zones	+
Floor	+
Hospital Service	+
new type	+
Nursing Unit	+
Room	+
Satellite	+
Team	+

Back
Delete
Save & Create New
Save

Editing An Existing Organization Unit Type

- To edit an Organization Unit Type, simply click on the **Edit** icon to the right of the desired Organization Unit Type.

The screenshot shows the 'Organization Types' page. The left sidebar contains navigation options: Dashboard, Assignment, Configuration (highlighted), and Settings. The main content area displays a table of organization types. The 'Room' entry is selected, and its edit icon is highlighted with a red box.

Name ↑	Description	Parents	Edit	Delete
> Crash Team				
> Facility				
> Floor	This is the floor of a hospital	1		
Hospital Service		1		
> Nursing Unit		5		
Bed		2		
> ED Zones	This includes the zones in the Emergency Department.	1		
> Room		2		
> Satellite		1		
> Team		1		
new type				

2. Edit the Name, Description, and Allowed Children.

The screenshot shows the 'Organization Type' edit form. The 'Room' entry is being edited. The form includes fields for Name, System Type, Description, Physical Location, Parents, and Allowed Children. The 'Allowed Children' field contains 'Bed'.

Details

Name: Room

System Type: Room

Description: This is a room for the facility

Physical Location:

Parents: ED Zones, Nursing Unit

Allowed Children

Bed

Existing Organization Types

Hospital Service +

new type +

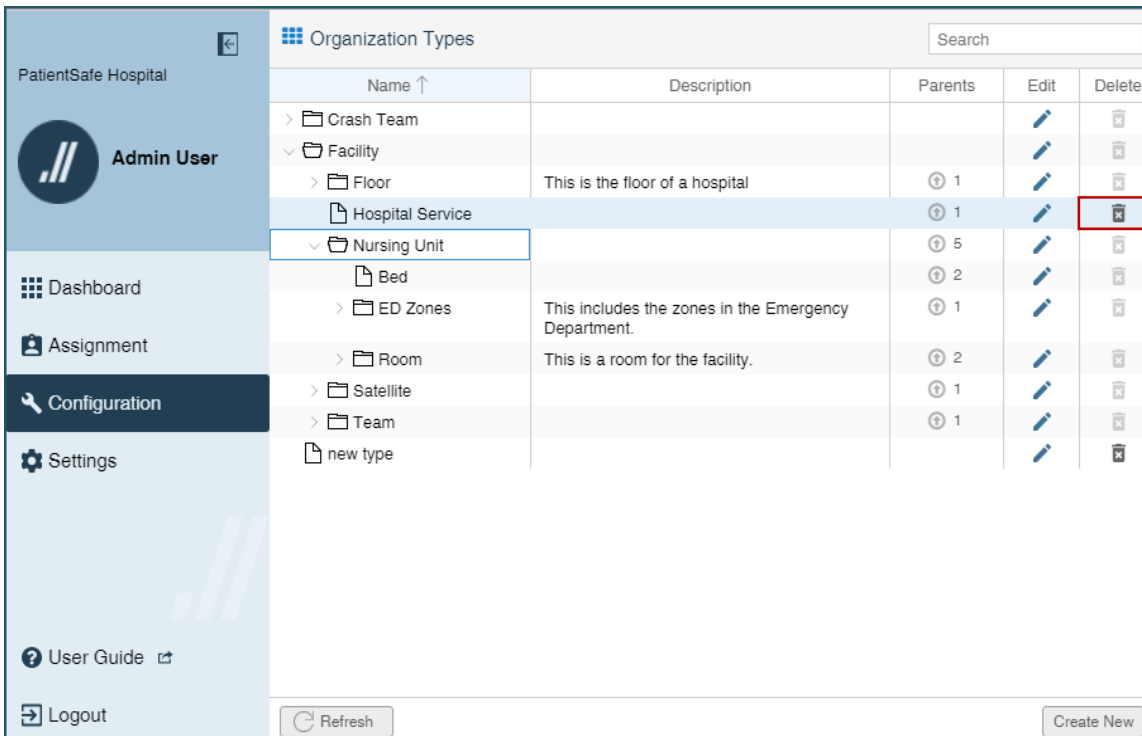
3. Click **Save** when you are done.

Deleting An Existing Organization Unit Type

Note Organization Unit Types cannot be deleted if there are any assignments associated with the organization type.

Users with the appropriate privileges can delete an Organization Unit Type by one of two methods:

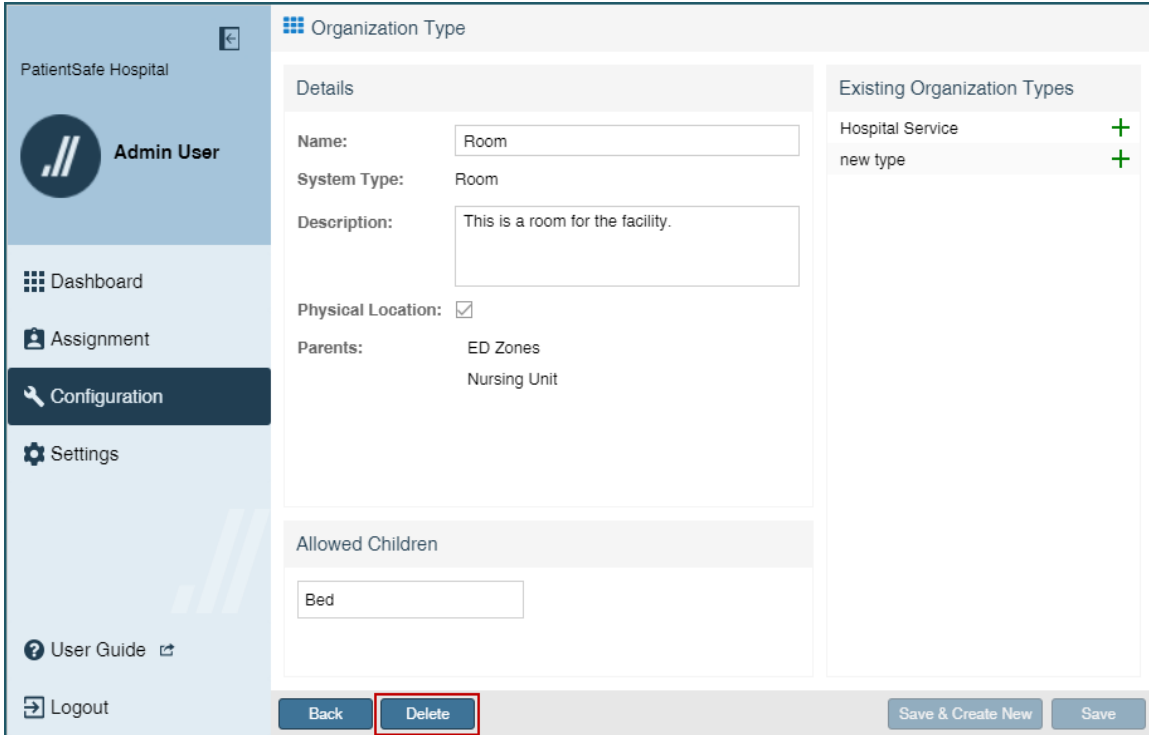
1. Click the **Delete** icon to the right of the selected organization type.



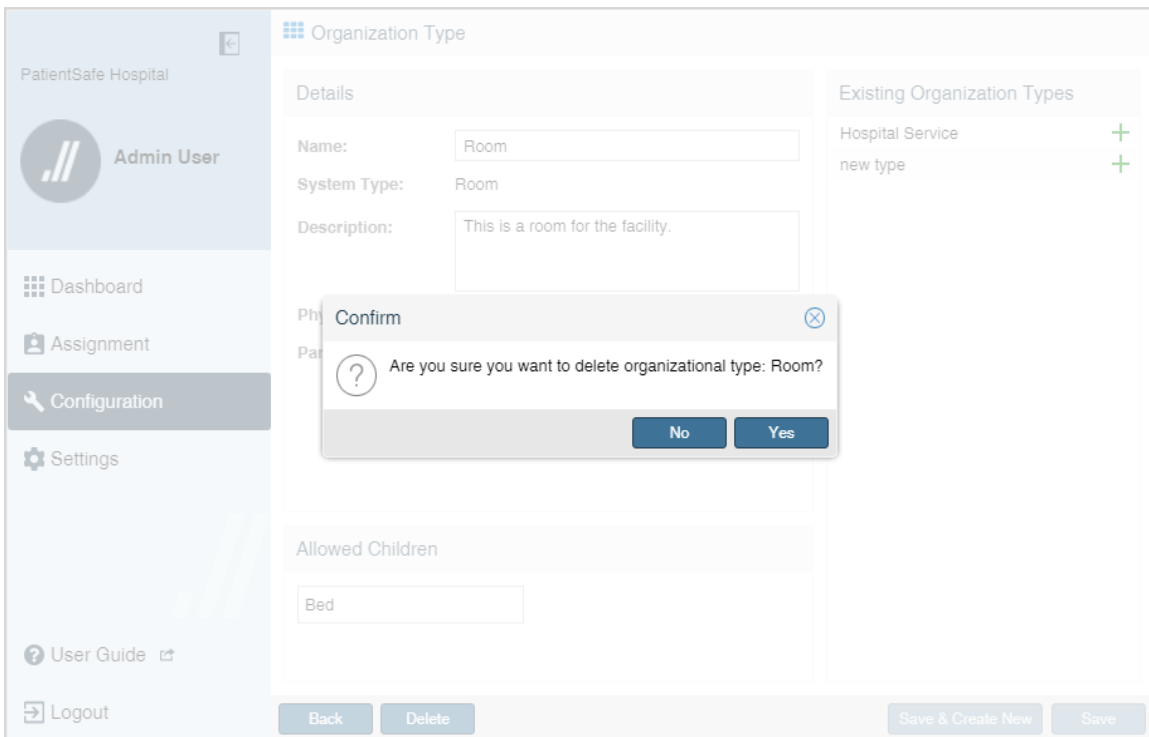
The screenshot shows the 'Organization Types' management screen. On the left is a navigation sidebar with options: PatientSafe Hospital, Admin User, Dashboard, Assignment, Configuration, Settings, User Guide, and Logout. The main area displays a table of organization types. The 'Hospital Service' row is selected, and its 'Delete' icon (a trash can) is highlighted with a red box.

Name ↑	Description	Parents	Edit	Delete
> Crash Team				
> Facility				
> Floor	This is the floor of a hospital	1		
Hospital Service		1		
> Nursing Unit		5		
> Bed		2		
> ED Zones	This includes the zones in the Emergency Department.	1		
> Room	This is a room for the facility.	2		
> Satellite		1		
> Team		1		
new type				

2. Or, on the **Edit** screen, drill down to the organization type for which you can delete.
3. Click **Delete** from the bottom left hand corner.



4. Click Yes or No on the confirmation message.



Searching for Organization Unit Types

Search for existing Organization Unit Types by entering your key words in the Search field.

The screenshot shows the 'Organization Types' page in the PatientSafe Enterprise Manager. A search bar at the top right contains the text 'Room'. Below the search bar is a table with the following columns: Name, Description, Parents, Edit, and Delete. The table lists various organization unit types, with 'Room' highlighted in blue. The 'Room' entry has a count of 2 in the 'Parents' column.

Name ↑	Description	Parents	Edit	Delete
> Crash Team				
▼ Facility				
> Floor	This is the floor of a hospital	⊕ 1		
Hospital Service		⊕ 1		
▼ Nursing Unit		⊕ 5		
Bed		⊕ 2		
▼ ED Zones	This includes the zones in the Emergency Department.	⊕ 1		
> Room	This is a room for the facility.	⊕ 2		
> Room	This is a room for the facility.	⊕ 2		
> Satellite		⊕ 1		
> Team		⊕ 1		
new type				

At the bottom of the interface, there are 'Refresh' and 'Create New' buttons.

Organization Units

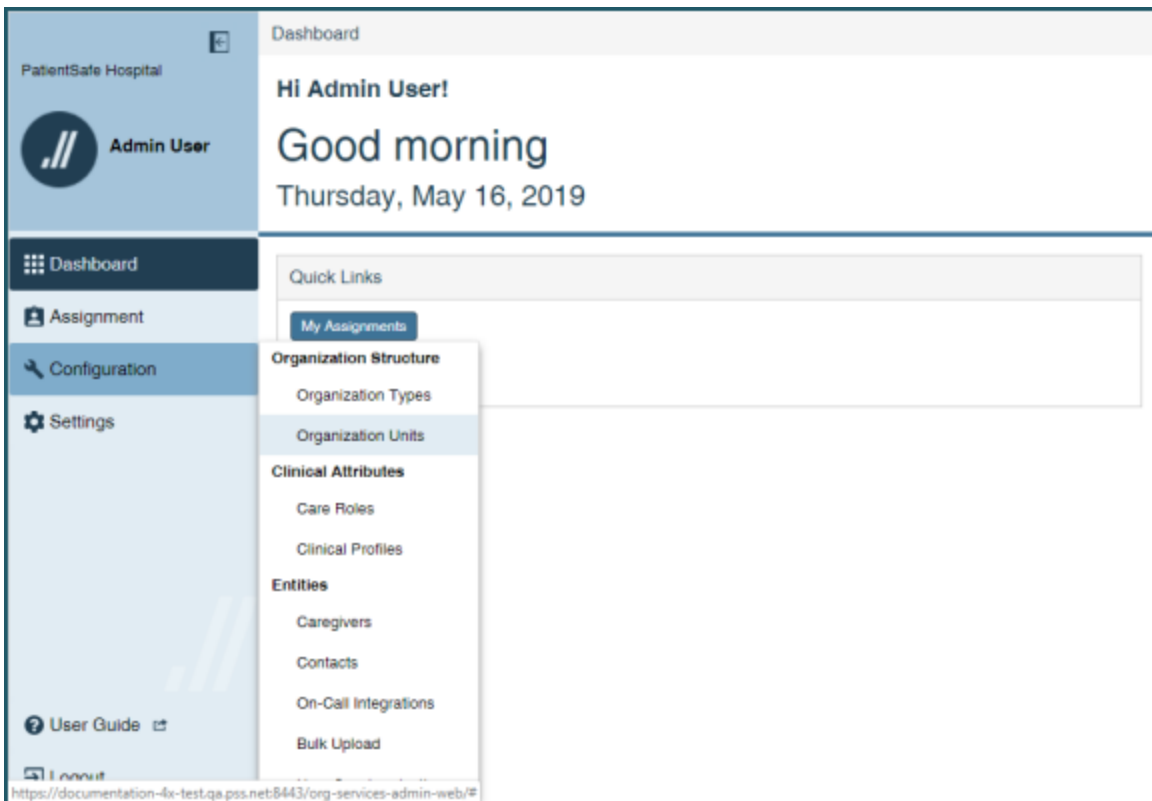
An Organization Unit is a physical representation of a type. So a type might be a facility and the unit would be a specific campus of the facility. Or, a type might be nursing unit and the Organization Unit would be the specific name of the unit, i.e. 3 West.

Enterprise Manager to Clinical Manager Behavior:

- All Organization Units created in the Enterprise Manager will display in the Clinical Manager.
- All Organization Units made inactive in the Enterprise Manager will display as inactive in the Clinical Manager.
- All room and bed "child" Organization Units configured in the Enterprise Manager will display in the Clinical Manager.

Viewing Existing Organization Units

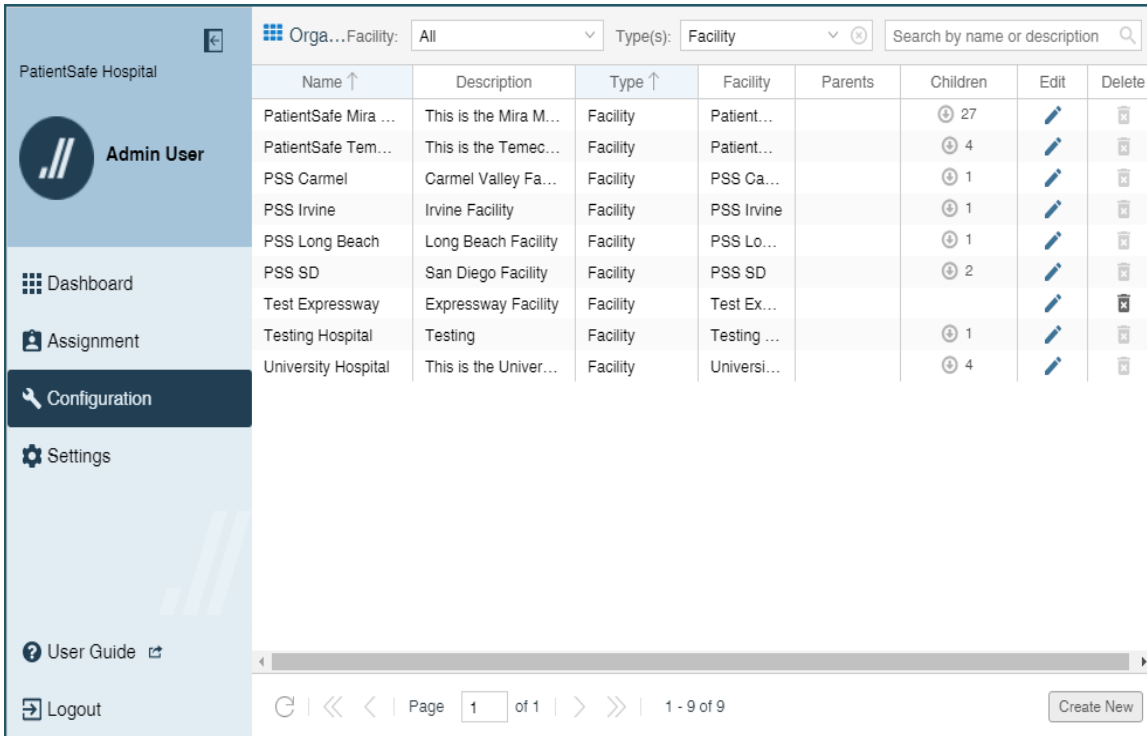
1. From the Dashboard, click Configuration>Organization Units.



2. A full list of existing Organization Units displays with the Name, Description, Type, Facility, Parents, and Children, as well as the option to Edit or Delete the Organization Unit.

- Sort Name and Description in either Ascending or Descending order by clicking the small up/down arrow to the right of each field.
- Arrows display at the bottom of the screen if there are multiple pages. Click the single right arrow to navigate to the next screen. Click the double right arrows to navigate to the end screen.

Note Organization Units can come over from the HL7 interface.




Name ↑	Description	Type ↑	Facility	Parents	Children	Edit	Delete
PatientSafe Mira ...	This is the Mira M...	Facility	Patient...		27		
PatientSafe Tem...	This is the Temec...	Facility	Patient...		4		
PSS Carmel	Carmel Valley Fa...	Facility	PSS Ca...		1		
PSS Irvine	Irvine Facility	Facility	PSS Irvine		1		
PSS Long Beach	Long Beach Facility	Facility	PSS Lo...		1		
PSS SD	San Diego Facility	Facility	PSS SD		2		
Test Expressway	Expressway Facility	Facility	Test Ex...				
Testing Hospital	Testing	Facility	Testing ...		1		
University Hospital	This is the Univer...	Facility	Universi...		4		

- Drill down into each facility to see the allowed children. For example, for the PatientSafe Mira Mesa facility, the allowed children include floors and nursing units.

Note Inactive nursing units display in gray italic font.

PatientSafe Hospital



Admin User

- Dashboard
- Assignment
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Organization Unit: PatientSafe Mira Mesa

Structure Contact Forwarding Care Roles

Details

Name:

Description:

Type:

Code:

Timezone:

Display in Contact

Browse Group:

Parents

Name	Type	Edit	Rem...
This organization unit has no parents			
<input type="button" value="Add"/>			


Children

Name	Type	Edit	Rem...
1E	Nursing Unit		
1st Floor	Floor		
2-West	Nursing Unit		

Creating New Organization Units

Users with the appropriate permission will be able to create new Organization Units.

1. To create a new Organization Unit click **Create New**.


PatientSafe Hospital

Orga...Facility: All
Type(s): Facility
Search by name or description

Name ↑	Description	Type ↑	Facility	Parents	Children	Edit	Delete
PatientSafe ...	This is the Mira M...	Facility	PatientSafe ...		27		
PatientSafe ...	This is the Temec...	Facility	PatientSafe ...		4		
PSS Carmel	Carmel Valley Fac...	Facility	PSS Carmel		1		
PSS Irvine	Irvine Facility	Facility	PSS Irvine		1		
PSS Long B...	Long Beach Facility	Facility	PSS Long B...		1		
PSS SD	San Diego Facility	Facility	PSS SD		2		
Test Expres...	Expressway Facility	Facility	Test Expres...				
Testing Hos...	Testing	Facility	Testing Hos...		1		
University H...	This is the Univers...	Facility	University H...		4		

Admin User

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Create New

Structure

Complete the following fields:

Note The required fields vary depending on the Type selected.

2. Name (required)
3. Description (optional)
4. Type (required): Select a type from the list that displays (bed, room, nursing unit, etc)

Note If the type is "Facility" then you need to select the associated TimeZone.

Note If the type is "Facility" then the Organization Unit name will display in the Clinical Manager under Configuration>Settings>Hospital Address tab.

5. Code: The Code field is used to integrate Organization Units between the Clinical Manager and Enterprise Manager. You cannot enter duplicate codes.
6. Facility: Select the associated facility from the drop down menu.
7. Display in Contact Browse Group: Click to have the organization unit display on the handheld under the Contacts tab>Browse Groups.
8. Parents (if applicable): Click **Add** to add applicable parents.
9. Allowed Children - Click **Add** to add applicable children.

PatientSafe Hospital

Admin User

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Logout

Organization Unit: 9 West

Structure Contact Forwarding Care Roles

Name: 9 West

Description:

Type: Nursing Unit

Code: 9W01

Facility: PatientSafe Mira Mesa

Display in Contact

Browse Group:

Parents

Name	Type	Edit	Rem...
PatientSafe Mira Mesa	Facility		

[Add](#)

Children

Name	Type	Edit	Rem...
101	Room		
201	Room		
301	Room		

[Back](#)
[Delete](#)
[Save & Create New](#)
[Save](#)

Contact

Add a contact for the new organization unit.

1. Click the **Add** button beneath the type of contact you want to add.

Organization Unit: 9 West

Structure **Contact** Forwarding Care Roles

Phone Numbers

Type	Number	Facility	Delete
No associated phone numbers			
			Add

Email Addresses

Type	Address	Delete
No associated Email address		
		Add

Postal Addresses

Type	Address 1	Addr... 2	City	State	ZIP code	Delete
No associated postal address						

Back Delete Save & Create New Save

2. If adding a phone number, select the type of phone number from the drop down menu, i.e. Primary Phone.
3. Enter the phone number.
4. Click **Save**.

PatientSafe Hospital

Admin User

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Organization Unit: 9 West

Structure **Contact** Forwarding Care Roles

Phone Numbers

Type	Number	Facility	Delete
Primary Phone	858-746-3100		

Email Addresses

Type	Address	Delete
No associated Email address		

Postal Addresses

Type	Address 1	Addr... 2	City	State	ZIP code	Delete
No associated postal address						

5. The new phone number has been added.

PatientSafe Hospital
Organization Unit: 9 West

Structure
Contact
Forwarding Care Roles

Phone Numbers

Type	Number	Facility	Delete
Primary Phone	858-746-3100		✕

Email Addresses

Type	Address	Delete
No associated Email address		

Postal Addresses

Type	Address 1	Addr... 2	City	State	ZIP code	Delete
No associated postal address						

Back
Delete
Save & Create New
Save

6. Repeat these steps for each phone number, email address, postal address or messaging JID.

Forwarding Care Roles

If your facility has the Clinical Communications module configured, you can have your phone calls forwarded to another phone/extension number.

For example, review the scenarios below for how this feature may be used.

Scenario #1

Floor 3 patients may be transferred to Floor 2 due to flooding. Floor 3 may want all calls forwarded to Floor 2. Use the call forwarding feature to have all Floor 3 calls forwarded to Floor 2.

Scenario #2

The Head Nurse of the 9 West nursing unit may want all calls forwarded to the Charge Nurse. Use the Forwarding Care Roles feature to have calls forwarded.

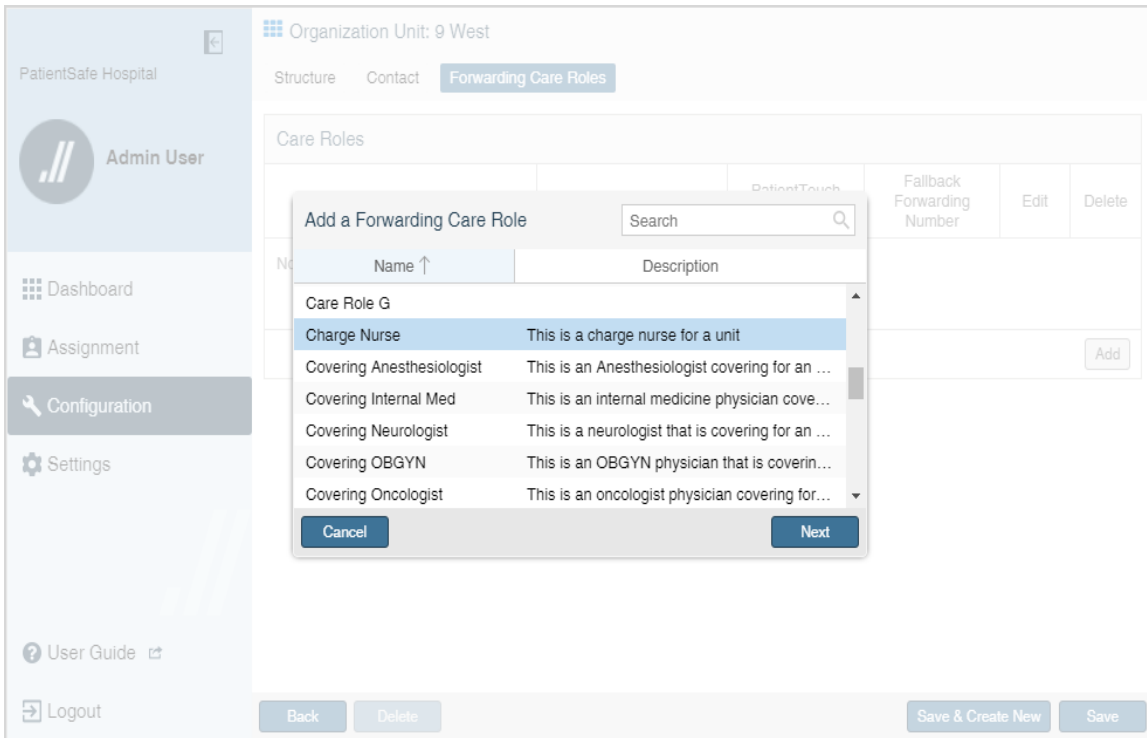
Note The Care Role Forwarding feature will only forward calls to one extension.

1. Click the **Add** button.

The screenshot shows the 'Forwarding Care Roles' configuration page in the PatientTouch Enterprise Manager. The page is titled 'Organization Unit: 9 West' and has three tabs: 'Structure', 'Contact', and 'Forwarding Care Roles'. The 'Forwarding Care Roles' tab is active. The main content area is titled 'Care Roles' and contains a table with the following columns: Name, Voice Systems, PatientTouch Extension, Fallback Forwarding Number, Edit, and Delete. The table is currently empty, and the text 'No forwarding Care Roles configured.' is displayed below the table. An 'Add' button is located at the bottom right of the table area and is highlighted with a red box. The sidebar on the left contains the following navigation options: Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The top navigation bar shows 'Organization Unit: 9 West' and the 'Forwarding Care Roles' tab is selected. At the bottom of the page, there are buttons for 'Back', 'Delete', 'Save & Create New', and 'Save'.

2. Select a care role from the list that displays (i.e. Charge Nurse) and click **Next**.

Note The list that displays here will vary depending on the Organization Unit Type selected under the Structure tab.



The screenshot shows the 'Forwarding Care Roles' configuration page for 'Organization Unit: 9 West'. The page includes a sidebar with navigation options like 'Dashboard', 'Assignment', 'Configuration', 'Settings', 'User Guide', and 'Logout'. The main content area displays a table of care roles with columns for 'Name', 'Description', 'PatientTouch', 'Fallback Forwarding Number', 'Edit', and 'Delete'. A modal window titled 'Add a Forwarding Care Role' is open, showing a search bar and a list of care roles. The 'Charge Nurse' role is selected, with its description 'This is a charge nurse for a unit' visible. The modal also includes 'Cancel' and 'Next' buttons.

3. Select one of the Available PatientTouch Extensions:

- Click **Find Next Available** to find the next available extension for this care role. This extension number displays in the PatientTouch Extension field.

- Enter the **Fallback Forwarding Number (required field)**. This number will ring if the Forwarding Care Role does not answer or if there is no Forwarding Care Role assigned. The Fallback Forwarding Number can be any number provided. It can be a Direct Inward Dialing (DID), a fully qualified number, or a non PSS extension.

Forwarding Care Roles

Facility: Name:

Voice System: PSS CUCM PatientTouch Extension:

Fallback Forwarding Number:

Available PatientTouch Extensions

Name	Start	External Access #	Exten...	Availability
Internal ...	1...	1...	N	858-746-3100	4633	sandy
External...	4...	4...	Y	8587460000	4634	smomeni
Blue Ra...	6...	6...	N		4635	n4
					4636	Available
					4637	Available
					4638	Available
					4639	Available
					4640	Available
					4641	Available
					4642	Available

4. Click **Done**.
5. The Forwarding Care Role displays.
6. Click **Save**.

Organization Unit: 9 West

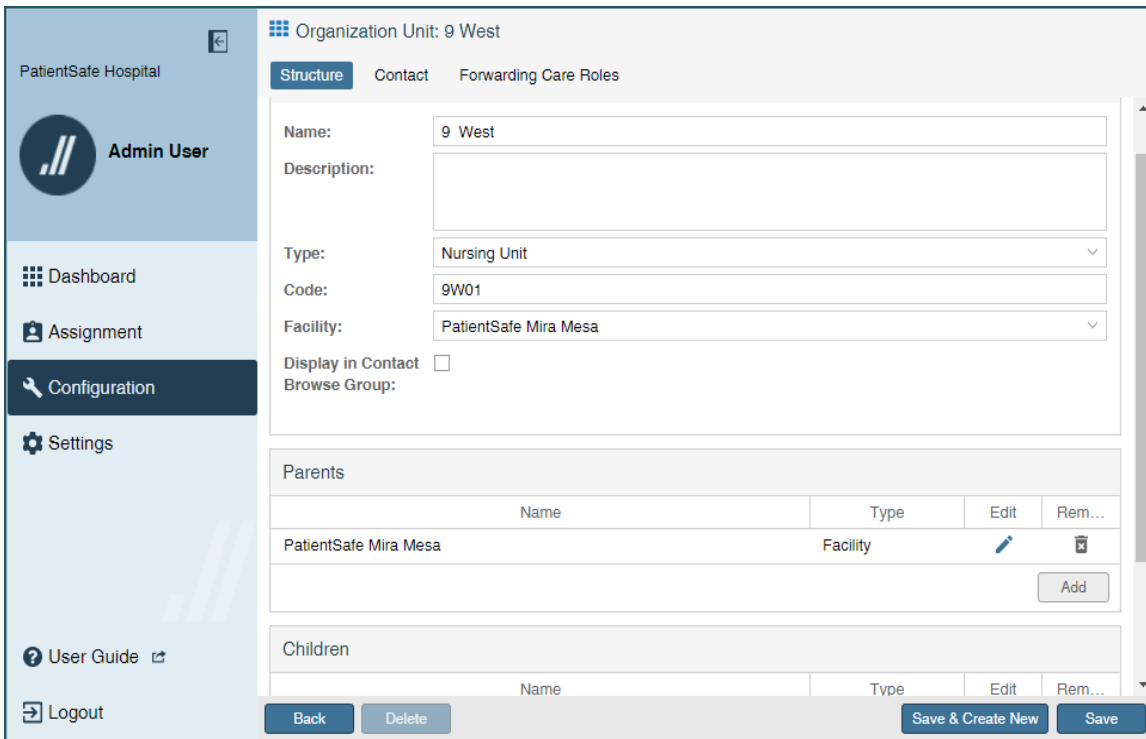
Structure Contact **Forwarding Care Roles**

Care Roles

Name	Voice Systems	PatientTouch Extension	Fallback Forwarding Number	Edit	Delete
9 West: Charge Nurse	PSS CUCM	4636	858-746-3100		

Saving Newly Created Organizational Units

1. If you have more than one Organization Unit to create, click **Save & Create New** to save your current Organization Unit and prepare to enter the next one.
2. If you have finished creating your new Organizational Unit, click **Save**.
3. Click the **Back** button at any time to return to the previous screen. If you have entered any information, you will receive a message asking if you want to save.



Organization Unit: 9 West

Structure Contact Forwarding Care Roles

Name: 9 West

Description:

Type: Nursing Unit



Code: 9W01

Facility: PatientSafe Mira Mesa

Display in Contact

Browse Group:

Parents

Name	Type	Edit	Rem...
PatientSafe Mira Mesa	Facility		

Add

Children

Name	Type	Edit	Rem...
------	------	------	--------

Back Delete Save & Create New Save

Editing Organization Units

To edit an Organizational Unit click the **Edit** icon to the far right of the Organizational Unit listed on the main screen. Or, double-click the individual Organizational Unit. This will allow you to edit the Name, Description, Type, Parents, and Allowable Children for that Organizational Unit.

Let's look at an example.

Inactivate an Active Nursing Unit

1. Double-click the Mira Mesa unit.

Note You will not be able to inactivate a nursing unit that has active patients/assignments.

Facility: All Type(s): Facility Search by name or description

Name ↑	Descripti...	Type ↑	Facility	Parents	Children	Edit	Delete
PatientSafe Mira Mesa	This is t...	Facility	Patie...		27		
PatientSafe Temecula	This is t...	Facility	Patie...		4		
PSS Carmel	Carmel ...	Facility	PSS ...		1		
PSS Irvine	Irvine Fa...	Facility	PSS ...		1		
PSS Long Beach	Long Be...	Facility	PSS ...		1		
PSS SD	San Die...	Facility	PSS ...		2		
Test Expressway	Express...	Facility	Test ...				
Testing Hospital	Testing	Facility	Testi...		1		
University Hospital	This is t...	Facility	Univ...		4		

Page 1 of 1 | 1 - 9 of 9 Create New

2. Edit the name, description, etc. if desired.

Organization Unit: PatientSafe Mira Mesa

Structure Contact Forwarding Care Roles

Details

Name: PatientSafe Mira Mesa
 Description: This is the Mira Mesa facility.
 Type: Facility
 Code: 92121
 Timezone: America/Los_Angeles (GMT-7)
 Display in Contact
 Browse Group:

Parents

Name	Type	Edit	Re...
This organization unit has no parents			

Back Delete Inactivate Add Save & Create New Save

3. Double-click on the active nursing unit.

Organization Unit: PatientSafe Mira Mesa

Structure	Contact	Forwarding Care Roles
2-West		Nursing Unit
3 South Satellite Pharmacy		Satellite
3-South		Nursing Unit
3.N		Nursing Unit
3W		Nursing Unit
4 WEST		Nursing Unit
9 WEST		Nursing Unit
AB03 Nursing Unit		Nursing Unit
AB04 Nursing Unit		Nursing Unit
After-hours Team		Team
Basement		Nursing Unit
CCU		Nursing Unit
CCU Satellite Pharmacy		Satellite
Code Blue Team		Team
Code Green Team		Team
Code Red Team		Team
eds test NU		Nursing Unit
EM		Nursing Unit
ICU		Nursing Unit

4. Click Inactivate.

Organization Unit: 9 WEST

Details

Name: 9 WEST

Description:

Type: Nursing Unit

Code: 9 WEST

Facility: PatientSafe Mira Mesa

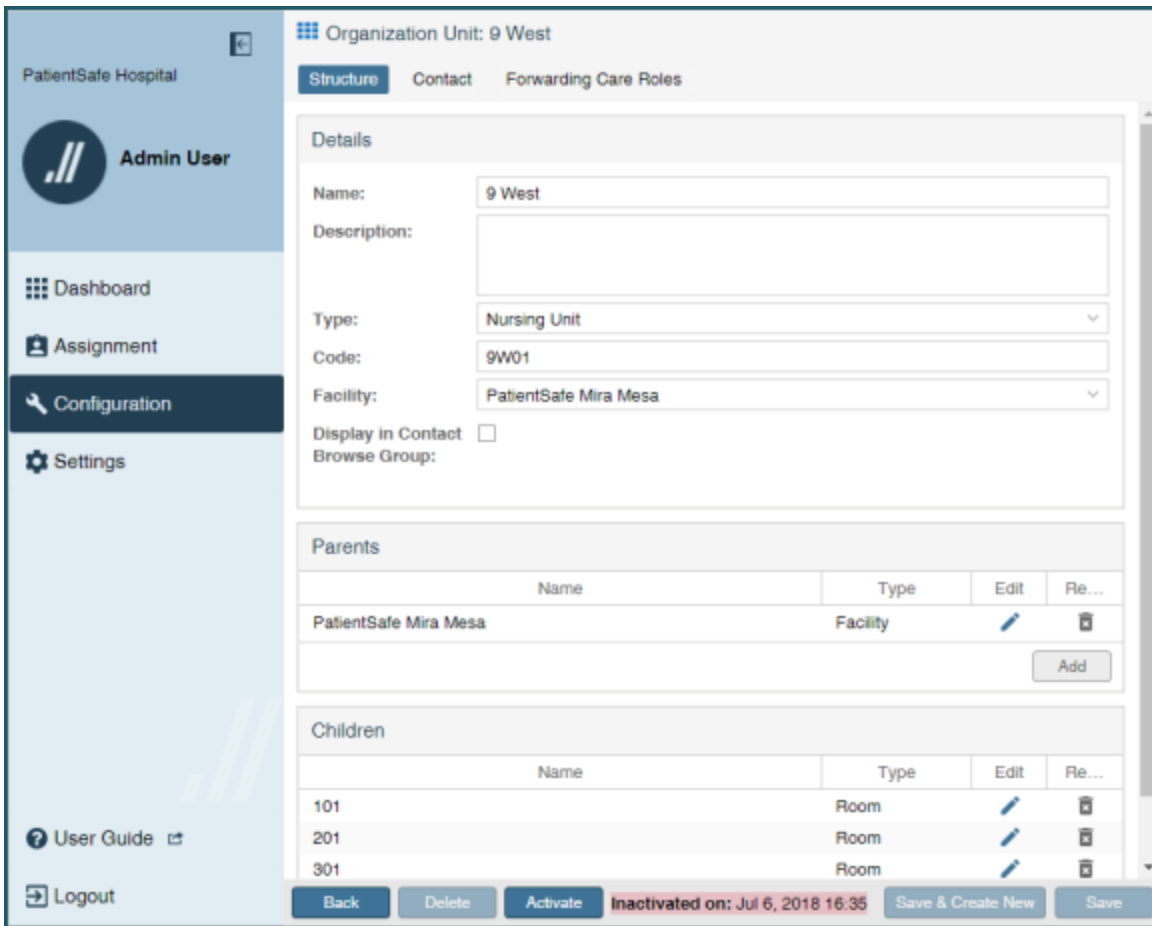
Display in Contact

Browse Group:

Name	Type	Edit	Re...
PatientSafe Mira Mesa	Facility		

Buttons: Back, Delete, **Inactivate**, Save & Create New, Save

5. You will receive a confirmation message asking you to confirm you want to inactivate the nursing unit. Click Yes.
6. The date and time you inactivated the unit displays at the bottom of the screen.
7. To reactivate the unit, click Activate.



Organization Unit: 9 West

Structure Contact Forwarding Care Roles

Details

Name: 9 West

Description:

Type: Nursing Unit



Code: 9W01

Facility: PatientSafe Mira Mesa

Display in Contact







Browse Group:

Parents

Name	Type	Edit	Re...
PatientSafe Mira Mesa	Facility		

Add

Children

Name	Type	Edit	Re...
101	Room		
201	Room		
301	Room		

Back Delete Activate Inactivated on: Jul 6, 2018 16:35 Save & Create New Save

Deleting Organization Units

Users with the appropriate privileges can delete an Organizational Unit by one of two methods:

Note Organization Units deleted in the Enterprise Manager will also be deleted in the Clinical Manager.

Note Organization Units cannot be deleted if there are any assignments associated with the unit.

1. Click the **Delete** icon to the right of the selected organization unit.

PatientSafe Hospital
 Admin User

Facility: PatientSafe Mira Mesa Type(s): Nursing Unit Search by name or description

Name ↑	Descrip...	Type ↑	Faci...	Parents	Children	Edit	Delete
3-North	This is t...	Nur...	Pati...	1	11		
3RDFLOOR		Nur...	Pati...	3	40		
3-South	This is t...	Nur...	Pati...	2	5		
3W		Nur...	Pati...	1	2		
4 WEST		Nur...	Pati...	1	1		
9 WEST		Nur...	Pati...	1	4		
AB03 Nursing Unit	Nursing...	Nur...	Pati...	1	1		
AB04 Nursing Unit		Nur...	Pati...	1	1		
AB05 Nursing Unit		Nur...	Pati...				
AB06 Nursing Unit		Nur...	Pati...		2		
Basement		Nur...	Pati...	1			
CCU		Nur...	Pati...	2	1		
ED	This is t...	Nur...	Pati...	1	5		
eds test NU		Nur...	Pati...	1	2		
EM		Nur...	Pati...	1	1		
Greg's Unit		Nur...	Pati...				
ICU	This is t...	Nur...	Pati...	1	5		
ICU		Nur...	Pati...	2	1		

Page 1 of 2 | 1 - 25 of 42 Create New

- Or, on the **Edit** screen, drill down to the organization unit for which you can delete.
- Click **Delete** from the bottom left hand corner.

PatientSafe Hospital

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Organization Unit: 1

Structure Contact Forwarding Care Roles

Description:

Type:

Code:

Facility:

Display in Contact

Browse Group:

Parents

Name	Type	Edit	Re...
222	Room		

Add

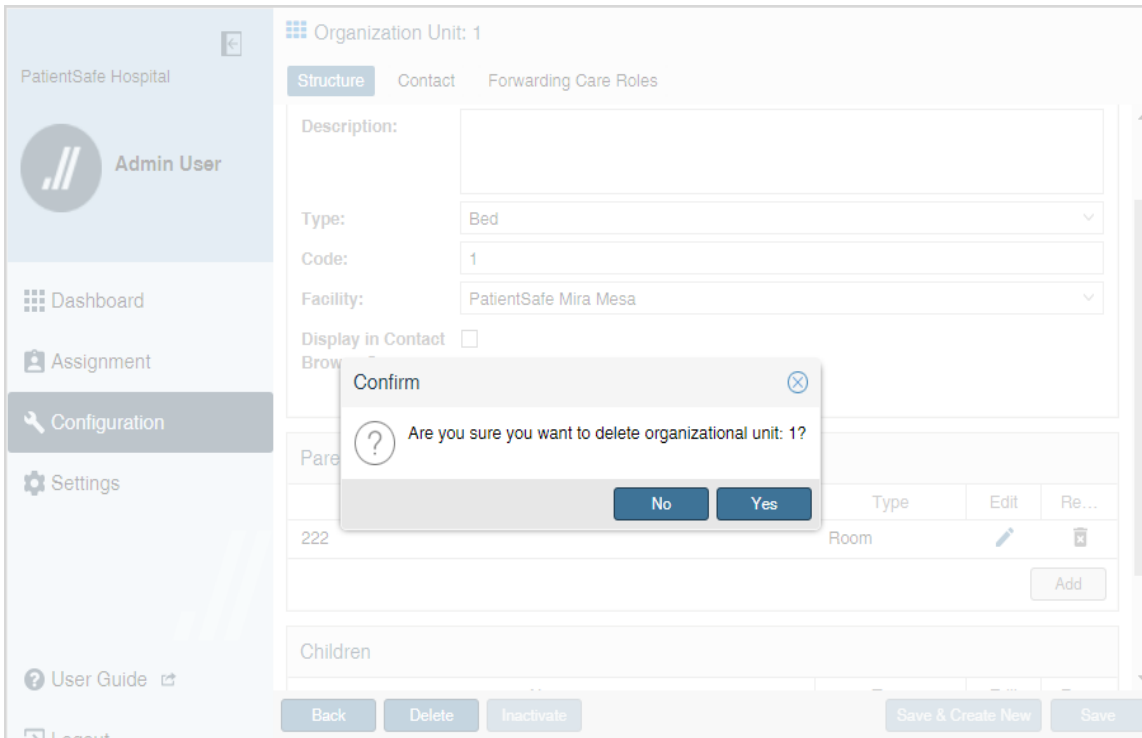
Children

Name	Type	Edit	Re...
Add allowed children from the Organization Unit list.			

Add

Back Delete Inactivate Save & Create New Save

4. Click **Yes** or **No** on the confirmation screen..

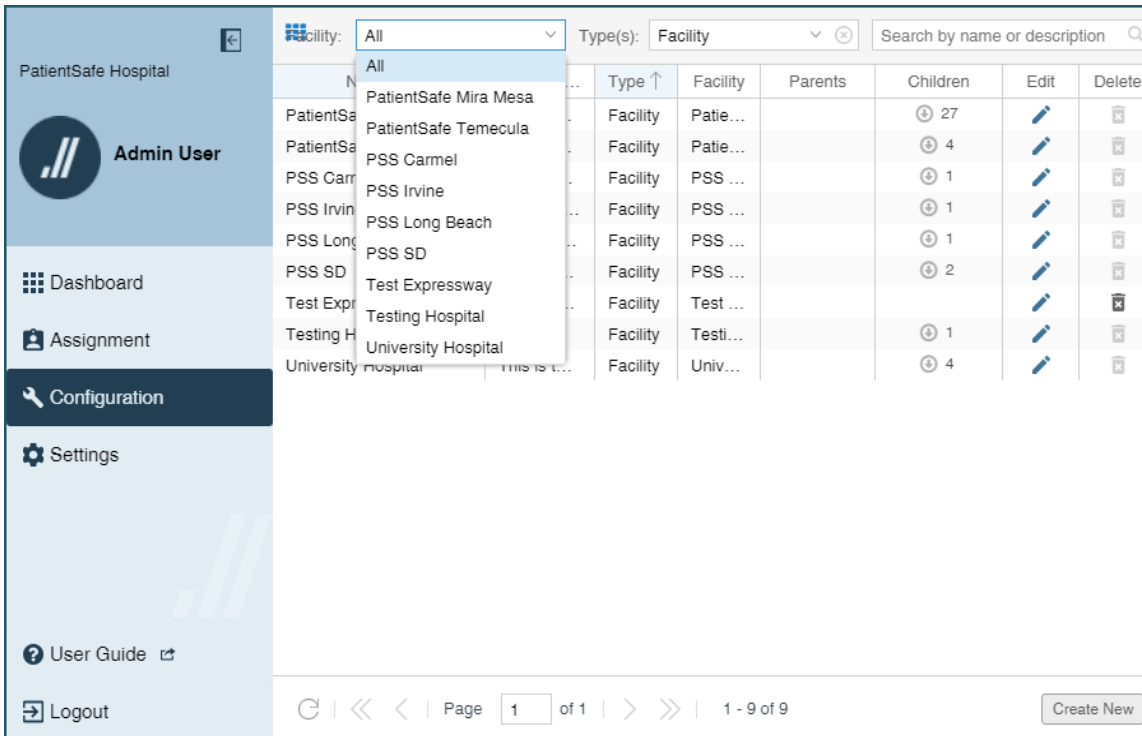


Searching for Existing Organizational Units

Search existing Organization Units using one or a combination of the following methods:

Facility

1. Click the Facility drop down menu and select from the list that displays.



The screenshot shows the PatientTouch Enterprise Manager interface. On the left is a navigation sidebar with the following items: PatientSafe Hospital, Admin User (with a profile icon), Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The main content area features a search bar with the text "Search by name or description". Below the search bar are two dropdown menus: "Facility:" with a value of "All" and "Type(s):" with a value of "Facility". A table displays a list of facilities with columns for Type, Facility name, Parents, Children, Edit, and Delete. The table contains 9 rows of data.

Type ↑	Facility	Parents	Children	Edit	Delete
Facility	Patie...		27		
Facility	Patie...		4		
Facility	PSS ...		1		
Facility	PSS ...		1		
Facility	PSS ...		1		
Facility	PSS ...		2		
Facility	Test ...				
Facility	Testi...		1		
Facility	Univ...		4		

At the bottom of the interface, there is a pagination control showing "Page 1 of 1" and "1 - 9 of 9", along with a "Create New" button.

Type

2. Click the Type(s) drop down menu and select one or more from the list that displays. To deselect, click an item a second time.

Facility: All Type(s): Facility, Nursing Unit Search by name or description

Name ↑	Descrip...	Type ↑	Children	Edit	Delete
PatientSafe Mira Mesa	This is t...	Faci...	27		
PatientSafe Temecula	This is t...	Faci...	4		
PSS Carmel	Carmel...	Faci...	1		
PSS Irvine	Irvine F...	Faci...	1		
PSS Long Beach	Long B...	Faci...	1		
PSS SD	San Di...	Faci...	2		
Test Expressway	Expres...	Faci...			
Testing Hospital	Testing	Faci...	1		
University Hospital	This is t...	Faci...	4		
10104		Nur...	1		
10151		Nur...	1		
13 EAST		Nur...	1		
1E		Nur...	1		
1st floor	Long B...	Nur...	2		
2.W		Nur...	1		
20101		Nur...	1		
20102		Nur...	1		
21016		Nur...	1		

Page 1 of 4 1 - 25 of 92 Create New

Name

- Click the Search field and search by name or description.

Facility: All Type(s): Search by type 9 West

Name ↑	Type ↑	Facility	Parents	Children	Edit
9 WEST	Nursing Unit	PatientSafe Mira...	1	4	

Page 1 of 1 1 - 1 of 1 Create New

Care Roles

A Care Role defines the relationship of the caregiver to a patient or Organization Unit within a facility. Caregivers who want to be assigned to a patient or Organization Unit must be assigned a Care Role.

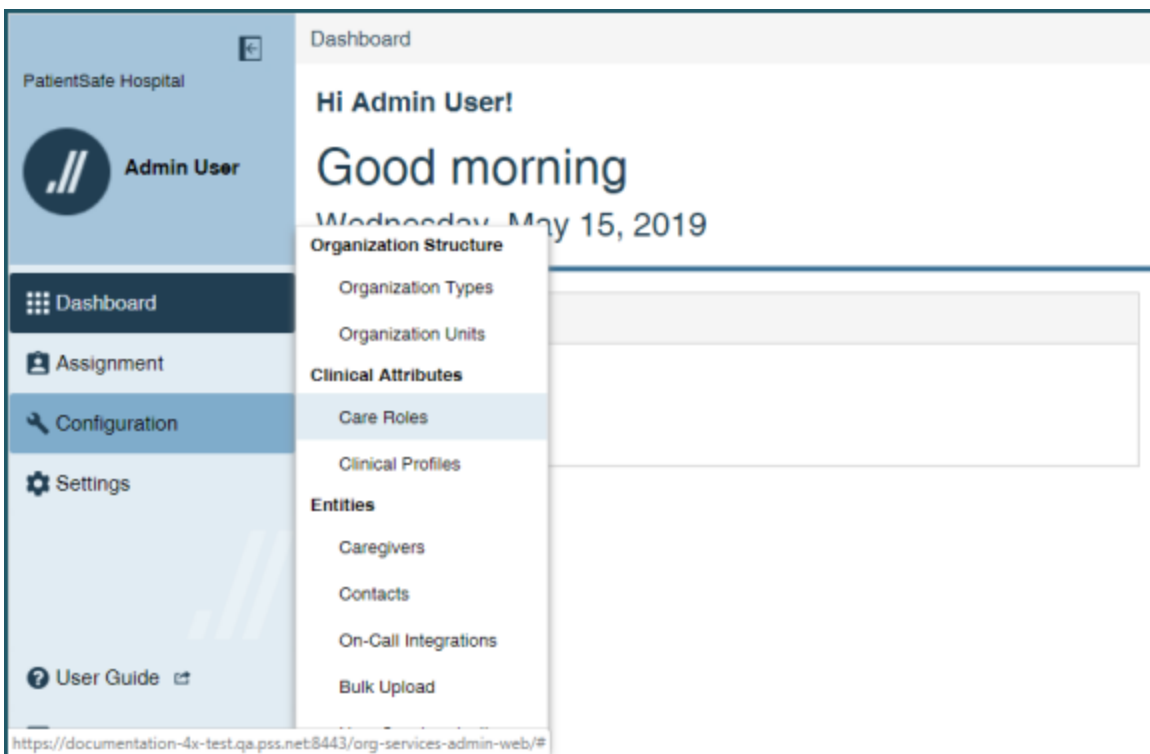
A Care Role can be a cardiologist, CNA, primary nurse, charge nurse, on-call cardiologist, phlebotomist, housekeeper, etc. The Care Role will be selected when creating your Clinical Profile.

The table below provides a list of sample care roles and corresponding assignments:


Care Role	Description	Assigned To
Charge Nurse	Charge Nurse for Unit	Organization Unit
Consulting Cardiologist	Cardiologist consulting for a specific patient visit	Patient
Pharmacist	Pharmacist for a location or set of locations	Organization Unit
Primary Nurse	Primary Nurse for a patient	Patient

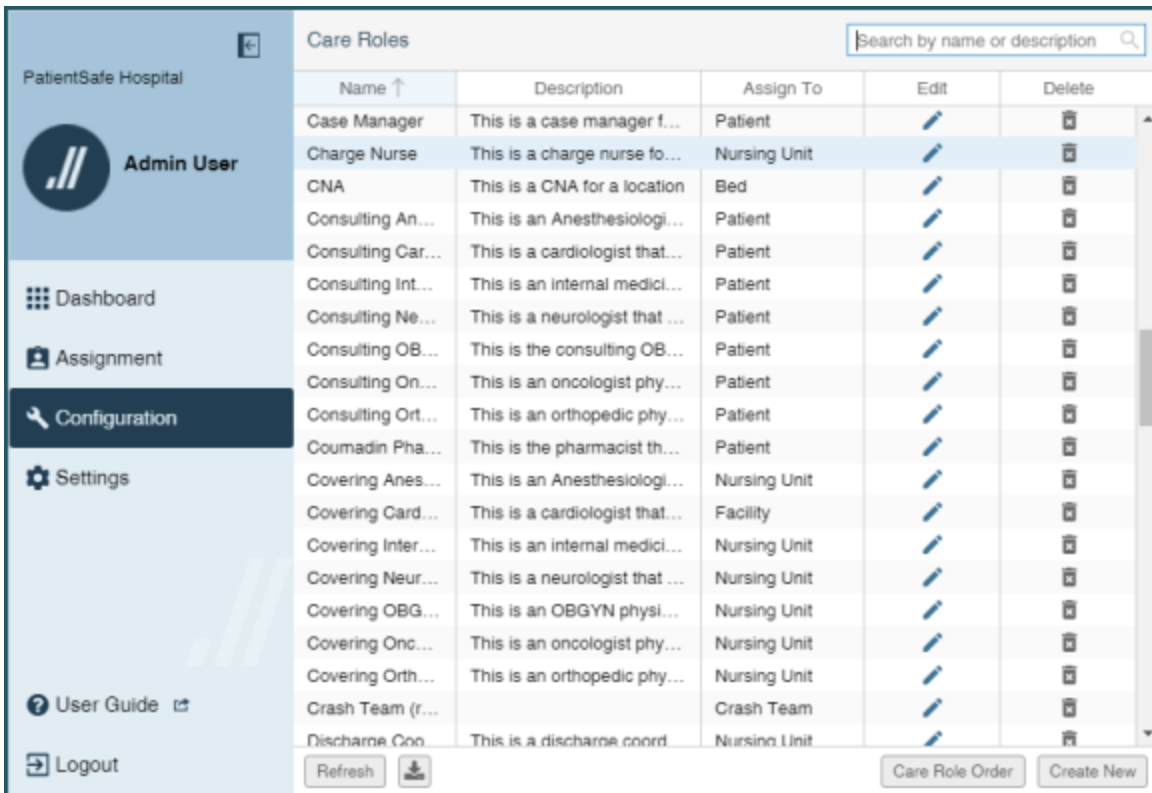
Viewing Existing Care Roles









































1. From the Dashboard, click Configuration>Care Roles.



2. A full list of existing Care Roles displays with the Name, Description, and Assign To, as well as the option to Edit or Delete.
3. Sort Name, Description, and Assign To in either Ascending or Descending order by clicking the small arrow to the right of each field.

- Download a CSV file  of all Care Roles. The file includes care role name, code, description, and assignment information.

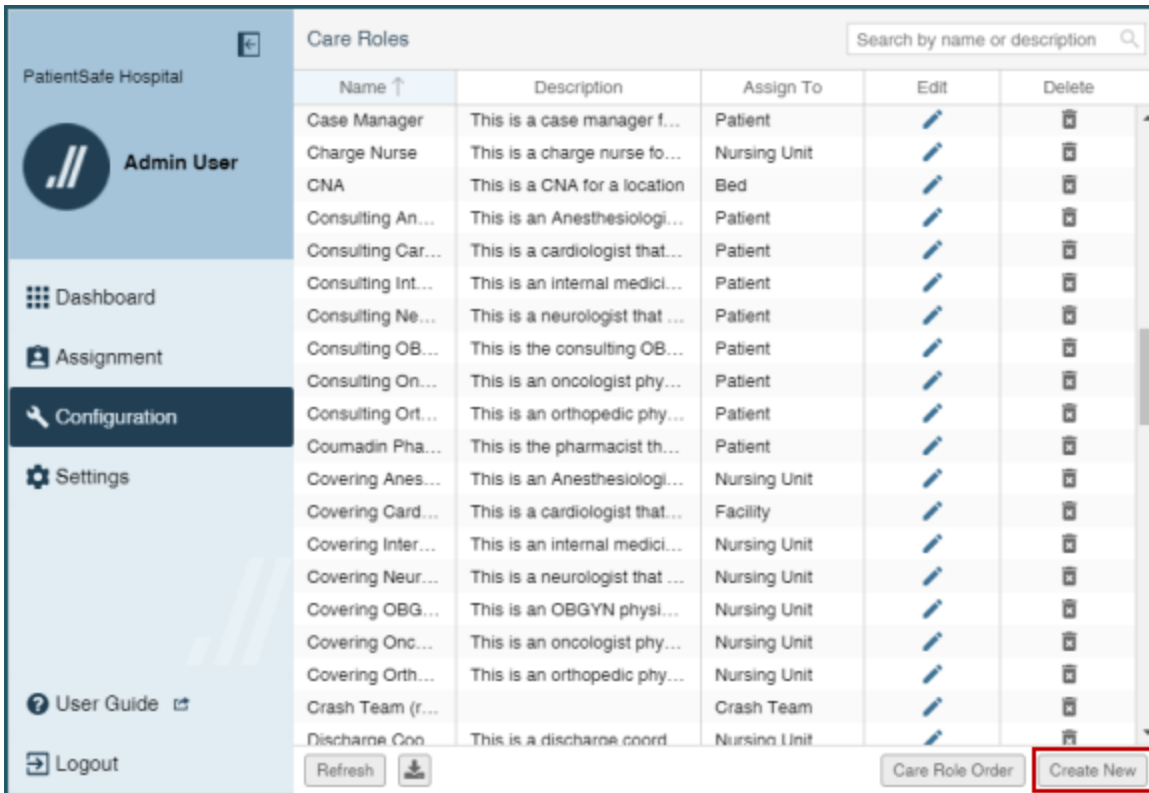


Name ↑	Description	Assign To	Edit	Delete
Case Manager	This is a case manager f...	Patient		
Charge Nurse	This is a charge nurse fo...	Nursing Unit		
CNA	This is a CNA for a location	Bed		
Consulting An...	This is an Anesthesiologi...	Patient		
Consulting Car...	This is a cardiologist that...	Patient		
Consulting Int...	This is an internal medici...	Patient		
Consulting Ne...	This is a neurologist that ...	Patient		
Consulting OB...	This is the consulting OB...	Patient		
Consulting On...	This is an oncologist phy...	Patient		
Consulting Ort...	This is an orthopedic phy...	Patient		
Coumadin Pha...	This is the pharmacist th...	Patient		
Covering Anes...	This is an Anesthesiologi...	Nursing Unit		
Covering Card...	This is a cardiologist that...	Facility		
Covering Inter...	This is an internal medici...	Nursing Unit		
Covering Neur...	This is a neurologist that ...	Nursing Unit		
Covering OBG...	This is an OBGYN physi...	Nursing Unit		
Covering Onc...	This is an oncologist phy...	Nursing Unit		
Covering Orth...	This is an orthopedic phy...	Nursing Unit		
Crash Team (r...		Crash Team		
Discharge Coor...	This is a discharge coord...	Nursing Unit		

Creating New Care Roles

Only one caregiver can be assigned to a particular patient or organization unit in a Care Role at a time. Care Roles must be completed prior to adding Clinical Profiles.

- To add a new Care Role, click **Create New**.



Name ↑	Description	Assign To	Edit	Delete
Case Manager	This is a case manager f...	Patient		
Charge Nurse	This is a charge nurse fo...	Nursing Unit		
CNA	This is a CNA for a location	Bed		
Consulting An...	This is an Anesthesiologi...	Patient		
Consulting Car...	This is a cardiologist that...	Patient		
Consulting Int...	This is an internal medici...	Patient		
Consulting Ne...	This is a neurologist that ...	Patient		
Consulting OB...	This is the consulting OB...	Patient		
Consulting On...	This is an oncologist phy...	Patient		
Consulting Ort...	This is an orthopedic phy...	Patient		
Coumadin Pha...	This is the pharmacist th...	Patient		
Covering Anes...	This is an Anesthesiologi...	Nursing Unit		
Covering Card...	This is a cardiologist that...	Facility		
Covering Inter...	This is an internal medici...	Nursing Unit		
Covering Neur...	This is a neurologist that ...	Nursing Unit		
Covering OBG...	This is an OBGYN physi...	Nursing Unit		
Covering Onc...	This is an oncologist phy...	Nursing Unit		
Covering Orth...	This is an orthopedic phy...	Nursing Unit		
Crash Team (r...		Crash Team		
Discharge Con	This is a discharge coord	Nursing Unit		

Details

Complete the following fields:

2. Name (required)
3. Code: The Code field integrates with the Clinical Server to recognize the Care Role.
4. Description (optional)
5. Assign To (Organizational Unit or Patient): Select Organization Unit or Patient. When you select Organization Unit, the Unit Type field displays.
6. Unit Type: Select the Unit Type from the drop down menu.
7. Options:
 - Exclusive per Organizational Unit or Patient - When selected, this means that a patient/org unit can only have one caregiver assigned.
 - Exclusive per Caregiver - When selected, the caregiver cannot be assigned to any other care role.
 - Restrict Assignment Management - When selected and the Care Role is saved, this option prevents the assignments for the care role from being modified when they are using an on-call scheduling system.
 - Show Empty Locations - Only for Care Roles assigned to an organization unit. When selected, this setting will prompt the display of empty locations (beds) when browsing your assignments.

- Show on Care Team - When enabled, this care role *will* display in patient's Care Teams. When disabled, this care role *will not* display in patients' Care Teams. Default setting is enabled.

8. Click **Save**.

PatientSafe Hospital

Care Roles: Primary Nurse

Details Associations

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Name: Primary Nurse

Code: PRIMARY_NURSE

Description:

Assign To: Organization Unit Patient

Options

Exclusive per Organization Unit or Patient Exclusive per Caregiver

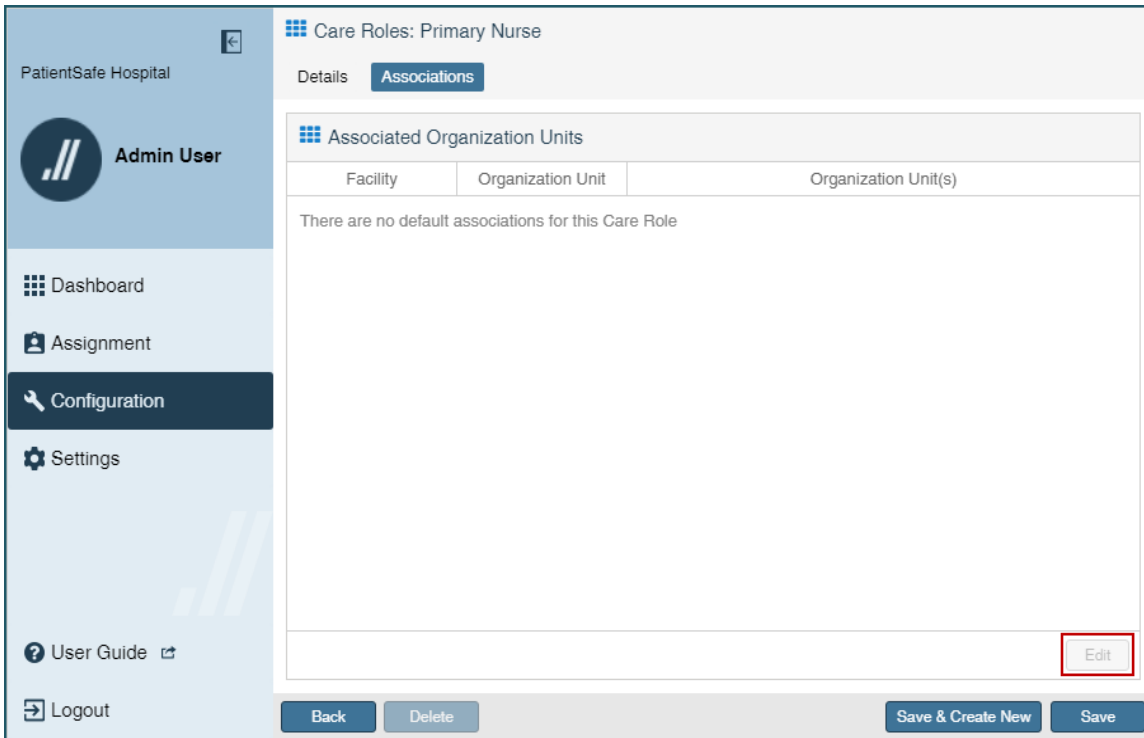
Restrict Assignment Management Show On Care Team

Back Delete Save & Create New Save

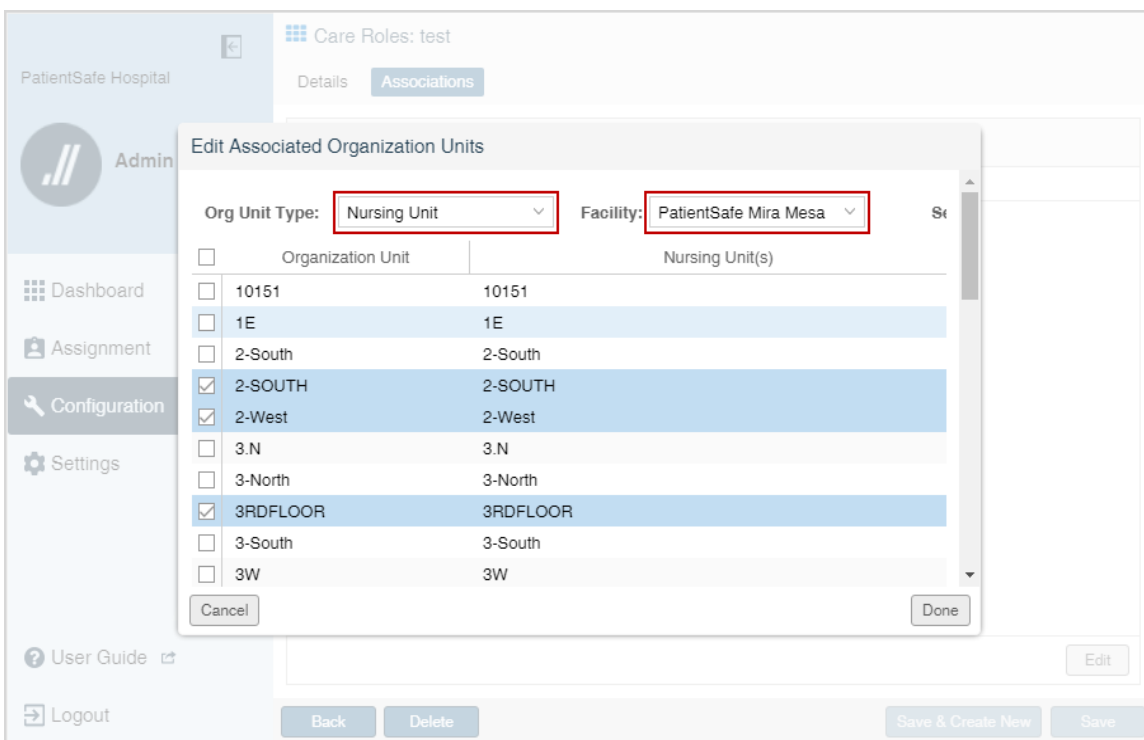
Associations

You can only assign Associated Organization Units after saving the information for the new Care Role.

1. Click **Associations** from the top of the screen.
2. Click **Edit**.



3. Ensure you have the correct Org Unit Type and Facility selected.

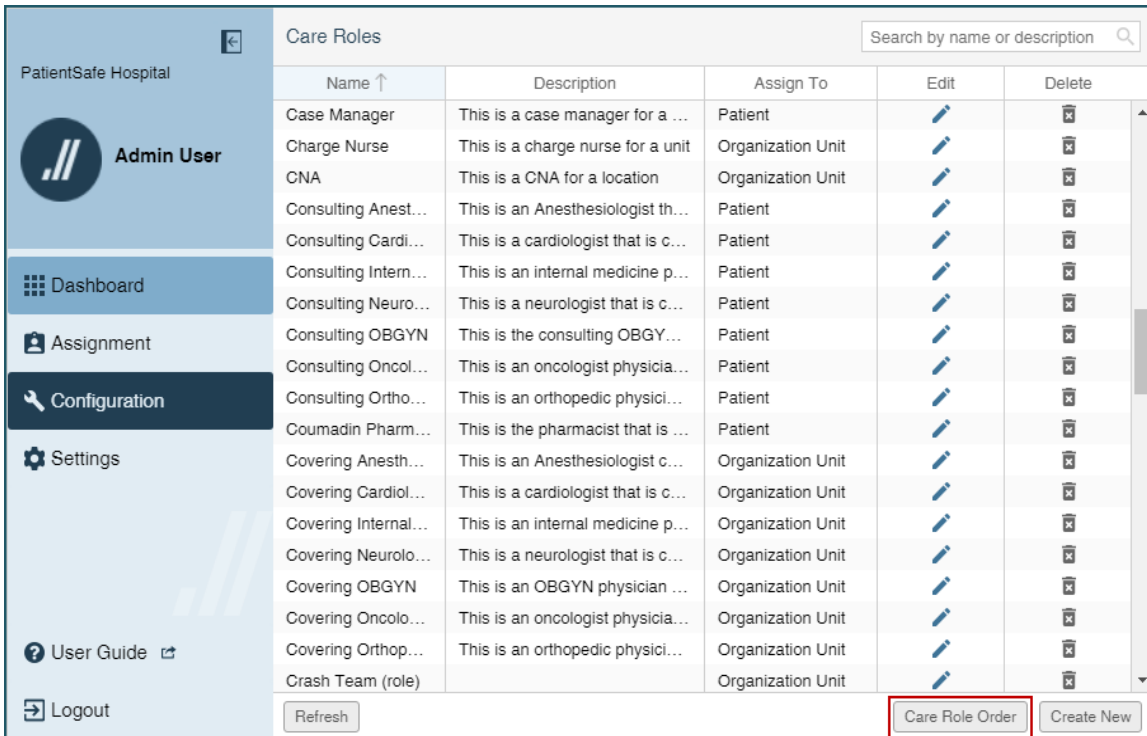


4. Select one or more associated nursing units.
5. Click **Done**.

You have completed the steps necessary to create a new care role.

Managing Care Role Order for Care Team

1. To manage the order of your Care Team click on **Care Role Order** in the bottom right hand corner of the window.



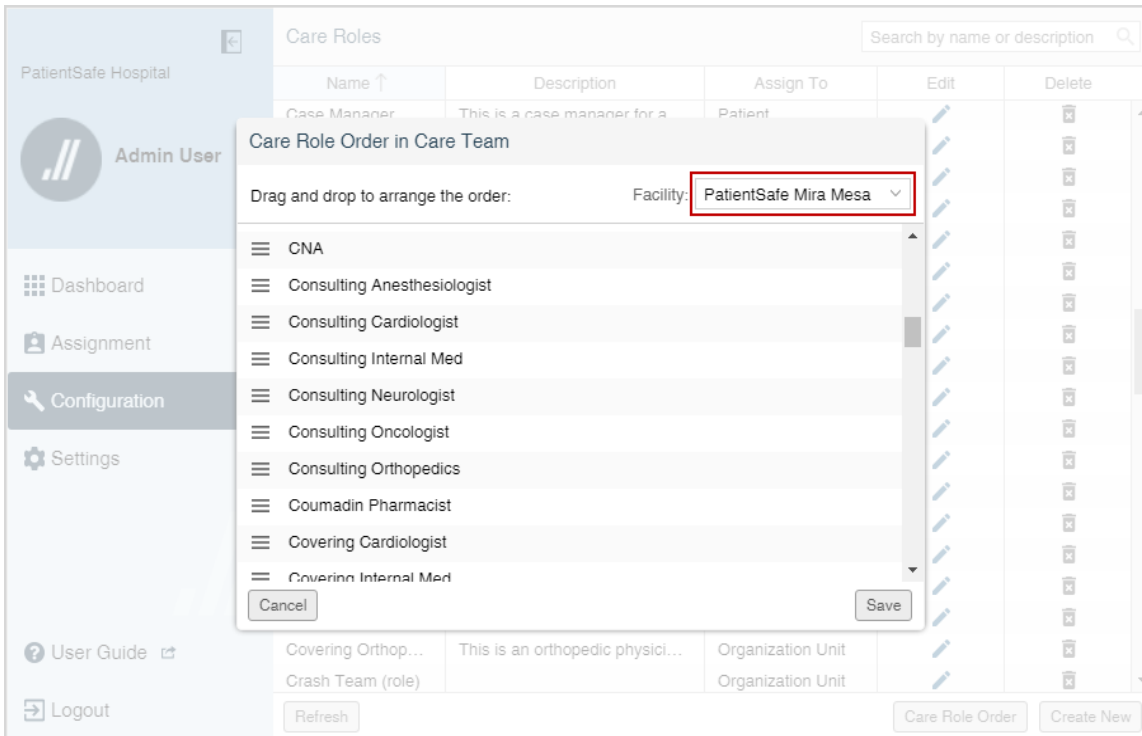
PatientSafe Hospital		Care Roles			
Admin User		Search by name or description			
Name ↑	Description	Assign To	Edit	Delete	
Case Manager	This is a case manager for a ...	Patient			
Charge Nurse	This is a charge nurse for a unit	Organization Unit			
CNA	This is a CNA for a location	Organization Unit			
Consulting Anest...	This is an Anesthesiologist th...	Patient			
Consulting Cardi...	This is a cardiologist that is c...	Patient			
Consulting Intern...	This is an internal medicine p...	Patient			
Consulting Neuro...	This is a neurologist that is c...	Patient			
Consulting OBGYN	This is the consulting OBGY...	Patient			
Consulting Oncol...	This is an oncologist physicia...	Patient			
Consulting Ortho...	This is an orthopedic physici...	Patient			
Coumadin Pharm...	This is the pharmacist that is ...	Patient			
Covering Anesth...	This is an Anesthesiologist c...	Organization Unit			
Covering Cardiol...	This is a cardiologist that is c...	Organization Unit			
Covering Internal...	This is an internal medicine p...	Organization Unit			
Covering Neurolo...	This is a neurologist that is c...	Organization Unit			
Covering OBGYN	This is an OBGYN physician ...	Organization Unit			
Covering Oncolo...	This is an oncologist physicia...	Organization Unit			
Covering Orthop...	This is an orthopedic physici...	Organization Unit			
Crash Team (role)		Organization Unit			

Refresh Care Role Order Create New







2. Select the desired facility from the drop down menu.
3. Drag and drop Care Roles into the preferred order you want listed in the application.

Note The order of the Care Roles listed in Care Role Order will also display on the handheld.

4. Click **Save**.



The screenshot displays the 'Care Roles' configuration page in the PatientTouch Enterprise Manager. A modal window titled 'Care Role Order in Care Team' is open, allowing the user to drag and drop roles to arrange their order. The facility is set to 'PatientSafe Mira Mesa'.

Name ↑	Description	Assign To	Edit	Delete
Case Manager	This is a case manager for a	Patient		
Covering Orthop...	This is an orthopedic physici...	Organization Unit		
Crash Team (role)		Organization Unit		

The modal window 'Care Role Order in Care Team' contains the following elements:

- Facility: PatientSafe Mira Mesa (dropdown menu)
- Drag and drop to arrange the order:
- List of roles:
 - CNA
 - Consulting Anesthesiologist
 - Consulting Cardiologist
 - Consulting Internal Med
 - Consulting Neurologist
 - Consulting Oncologist
 - Consulting Orthopedics
 - Coumadin Pharmacist
 - Covering Cardiologist
 - Covering Internal Med
- Buttons: Cancel, Save

Editing Care Roles

1. To edit a Care Role, simply click the **Edit** icon to the right of the desired Care Role.
2. Or, double-click the individual Care Role.

Care Roles					
Search by name or description					
Name ↑	Description	Assign To	Edit	Delete	
On Call Neurologist	This is a neurologist physicia...	Organization Unit			
On Call OBGYN	This is an OBGYN physician ...	Organization Unit			
On Call Oncologist	This is an oncologist specialt...	Organization Unit			
On Call Orthoped...	This is an orthopedic physici...	Organization Unit			
OR nurse	This is a nurse that is staffed ...	Organization Unit			
outside		Organization Unit			
PCA	Patient care associate for a l...	Organization Unit			
Pharmacist	This is a pharmacist for a loc...	Organization Unit			
Pharmacy Tech	This is a pharmacist technici...	Organization Unit			
Physician	This is the attending physicia...	Patient			
Physician Assistant	This is the physician assistan...	Patient			
Primary Nurse		Patient			
Primary Nurse 2		Patient			
PT	This is the physical therapist ...	Organization Unit			
Radiology On Call		Organization Unit			
Registered Nurse 2		Organization Unit			
Resident	This is a resident physician a...	Organization Unit			
Respiratory Ther...	This is the RT for a location	Organization Unit			
RN After-Hour		Organization Unit			

3. Edit the Name, Code, Description, and Associations for that Care Role.

Care Roles: Primary Nurse

Details Associations

Details

Name:

Code:

Description:

Assign To: Organization Unit Patient

Options

Exclusive per Organization Unit or Patient Exclusive per Caregiver

Restrict Assignment Management

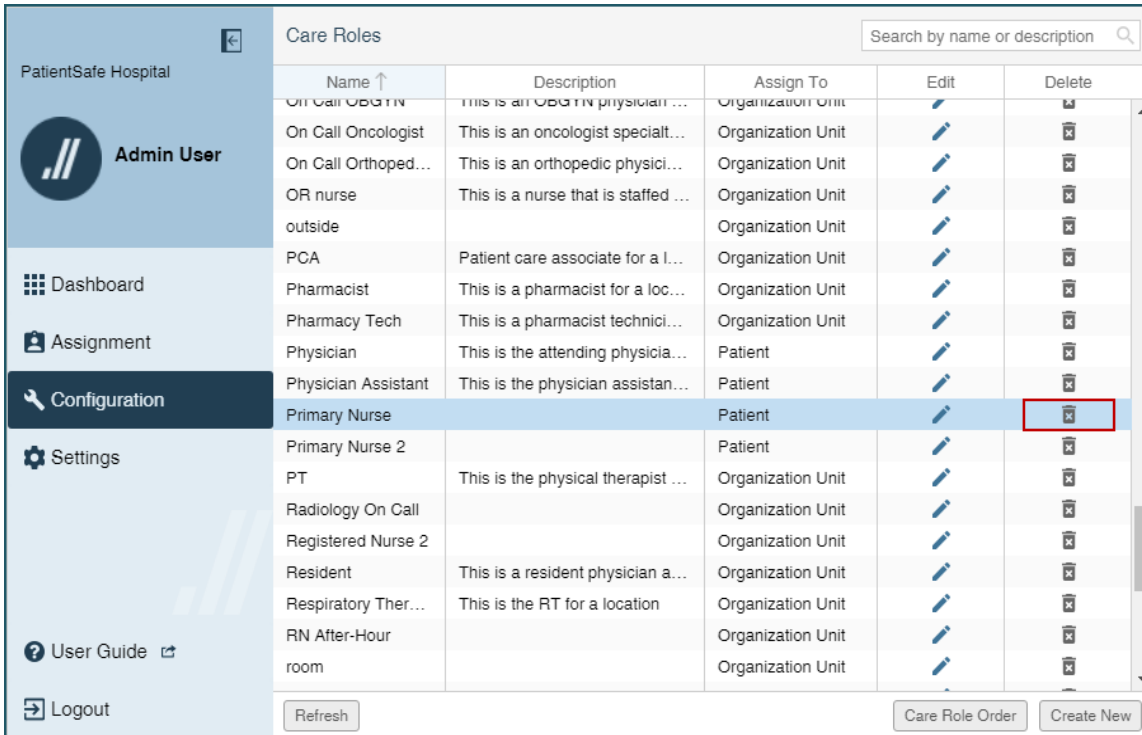
Back Delete Save & Create New Save

4. Click **Save** when you are done.

Deleting Care Roles

Users with the appropriate privileges can delete a Care Role by one of two methods:

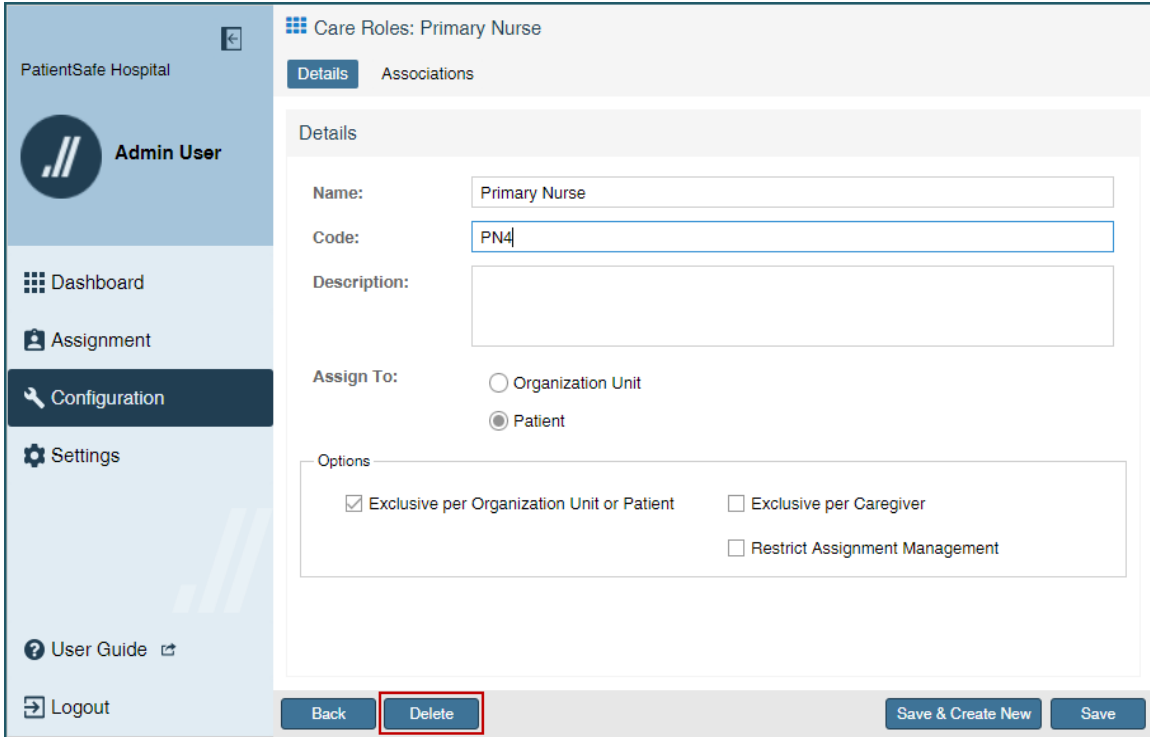
1. Click the **Delete** icon to the right of the selected Care Role.



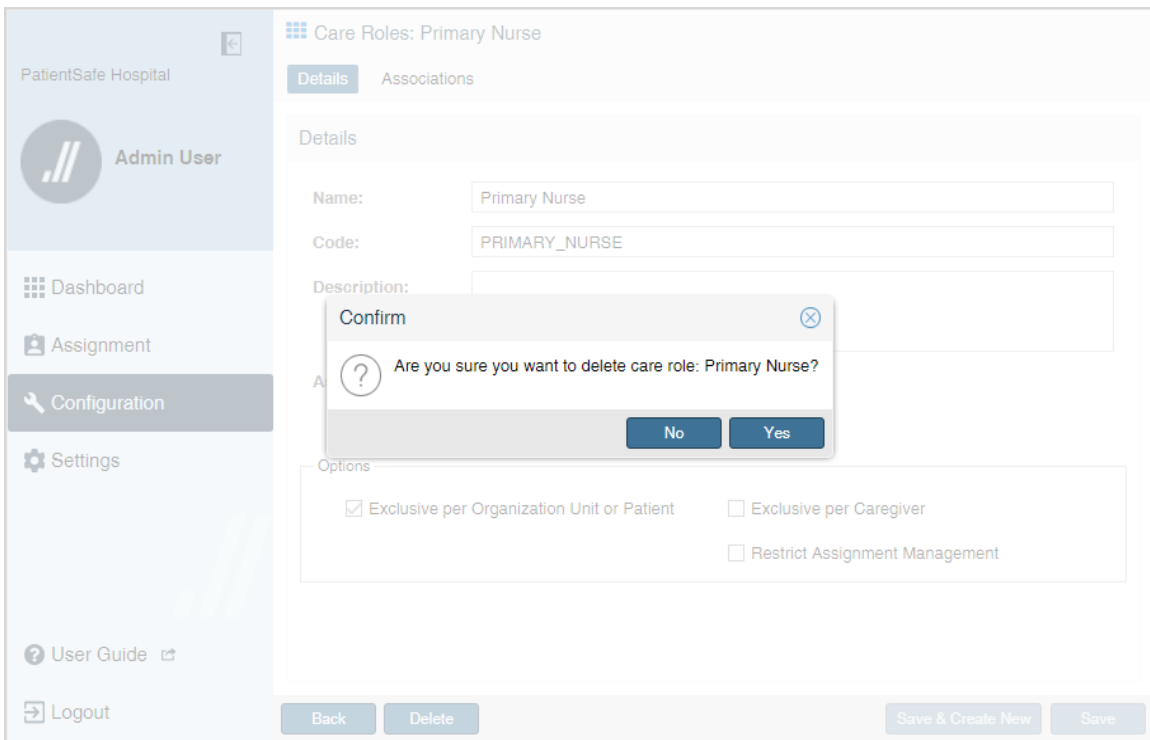
The screenshot displays the 'Care Roles' configuration page in the PatientTouch Enterprise Manager. The interface includes a left-hand navigation menu with options like Dashboard, Assignment, Configuration (selected), Settings, User Guide, and Logout. The main content area shows a table of care roles with columns for Name, Description, Assign To, Edit, and Delete. The 'Primary Nurse' role is selected, and its 'Delete' icon is highlighted with a red box.

Name ↑	Description	Assign To	Edit	Delete
On Call OB/GYN	This is an OB/GYN physician ...	Organization Unit		
On Call Oncologist	This is an oncologist specialt...	Organization Unit		
On Call Orthoped...	This is an orthopedic physi...	Organization Unit		
OR nurse	This is a nurse that is staffed ...	Organization Unit		
outside		Organization Unit		
PCA	Patient care associate for a l...	Organization Unit		
Pharmacist	This is a pharmacist for a loc...	Organization Unit		
Pharmacy Tech	This is a pharmacist technici...	Organization Unit		
Physician	This is the attending physicia...	Patient		
Physician Assistant	This is the physician assistan...	Patient		
Primary Nurse		Patient		
Primary Nurse 2		Patient		
PT	This is the physical therapist ...	Organization Unit		
Radiology On Call		Organization Unit		
Registered Nurse 2		Organization Unit		
Resident	This is a resident physician a...	Organization Unit		
Respiratory Ther...	This is the RT for a location	Organization Unit		
RN After-Hour		Organization Unit		
room		Organization Unit		

2. Or, from the Edit screen, click **Delete** from the bottom left hand corner.



3. Click **Yes** or **No** on the confirmation screen.



Searching for Existing Care Roles

To search the existing list of Care Roles, enter your key words for Name or Description into the Search field.

The screenshot displays the PatientTouch Enterprise Manager interface. On the left is a navigation sidebar with the following items: PatientSafe Hospital, Admin User (with a profile icon), Dashboard, Assignment, Configuration (highlighted in dark blue), Settings, User Guide, and Logout. The main content area is titled "Care Roles" and features a search bar at the top right containing the text "prim". Below the search bar is a table with the following columns: Name ↑, Description, Assign To, Edit, and Delete. The table contains one row: "Primary Nurse" under the Name column, "Patient" under the Assign To column, and icons for Edit and Delete. At the bottom of the main area are three buttons: "Refresh", "Care Role Order", and "Create New".

Name ↑	Description	Assign To	Edit	Delete
Primary Nurse		Patient		

Clinical Profiles

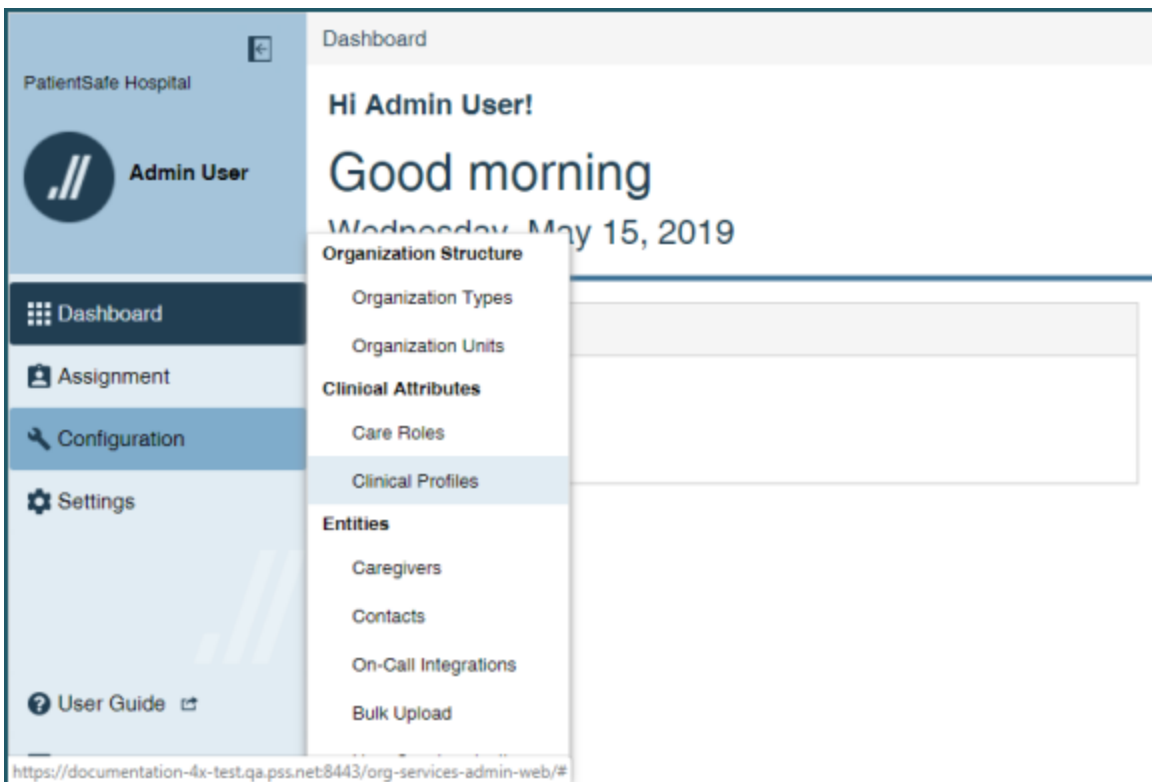
Clinical Profiles are linked to your Care Role and sometimes have the same name as the Care Role. They are used to indicate the type of clinician or non-clinician the user is. This is typically based on the credential or education/training received by the caregiver. Clinical Profiles can be configured for each separate facility.


The table below provides an example of some Clinical Profiles, Assigned Care Roles and Permissions.

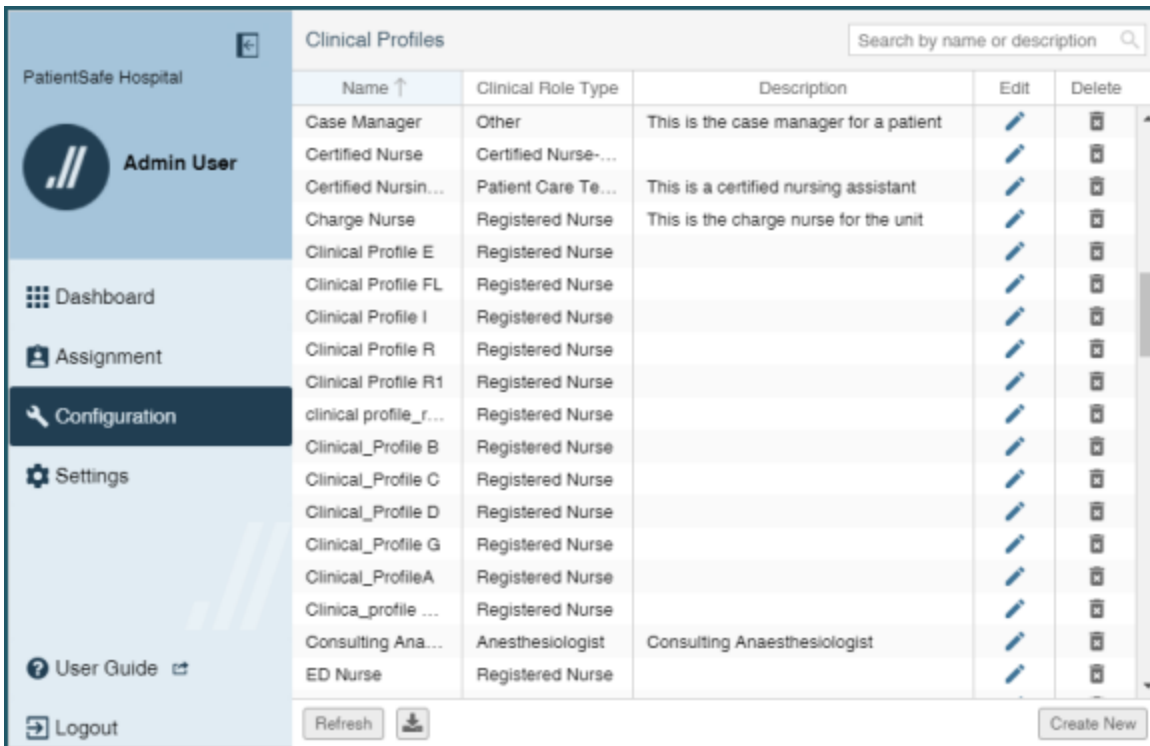
Clinical Profile	Assigned Care Role	Permissions
Physician	Attending Physician Resident	Assign Self Only Access to: <ul style="list-style-type: none"> • PatientTouch Mobile • Enterprise Manager • Patient List
Registered Nurse	Charge Nurse Primary Nurse	Same as above
Clinical Admin	Clinical Admin	Same as above with the addition of clinical configuration options
System Admin	System Admin	Same as above with the addition of clinical configuration options





































Viewing Existing Clinical Profiles

1. From the Dashboard, click Configuration>Clinical Profiles.



2. A full list of existing Clinical Profiles displays with the Name, Clinical Role Type, and Description, as well as the option to Edit or Delete.
3. Sort Name, Clinical Role Type, and Description in either Ascending or Descending order by clicking the small arrow to the right of each field.
4. Download a CSV file  of all Clinical Profiles. The file includes the clinical profile name, code, description, and clinical role type ID.



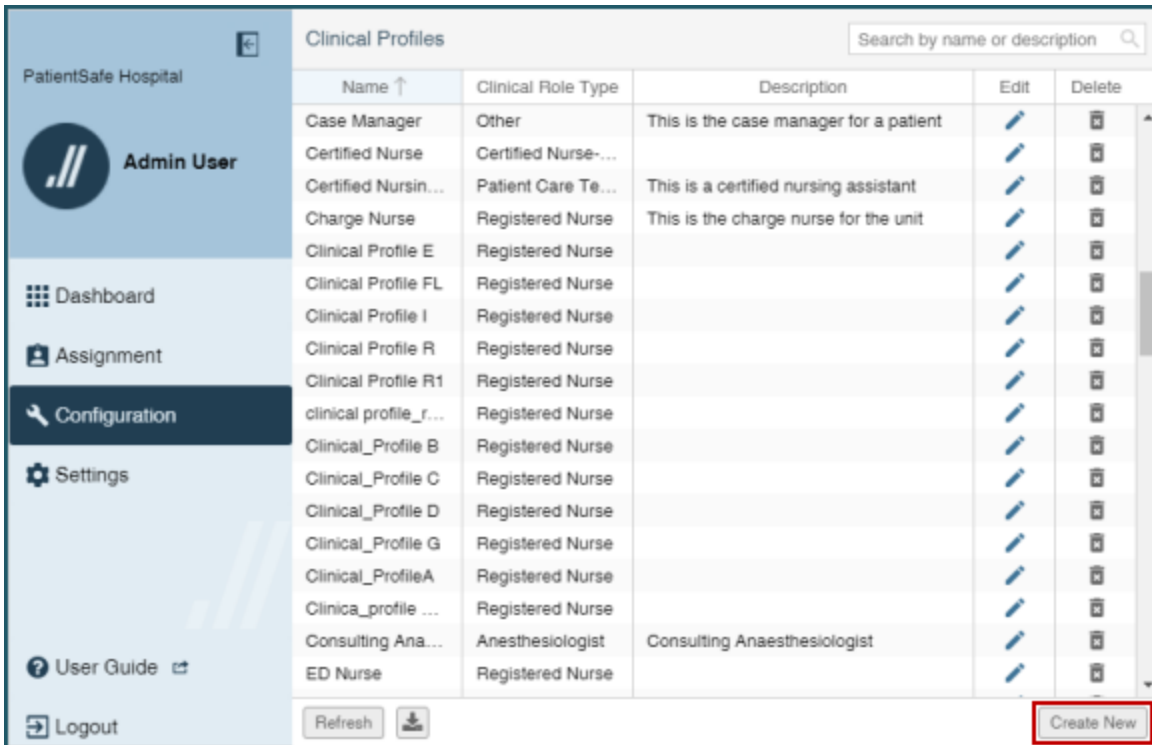
PatientSafe Hospital		Clinical Profiles			Search by name or description	
Name ↑	Clinical Role Type	Description	Edit	Delete		
Case Manager	Other	This is the case manager for a patient				
Certified Nurse	Certified Nurse-...					
Certified Nursin...	Patient Care Te...	This is a certified nursing assistant				
Charge Nurse	Registered Nurse	This is the charge nurse for the unit				
Clinical Profile E	Registered Nurse					
Clinical Profile FL	Registered Nurse					
Clinical Profile I	Registered Nurse					
Clinical Profile R	Registered Nurse					
Clinical Profile R1	Registered Nurse					
clinical_profile_r...	Registered Nurse					
Clinical_Profile B	Registered Nurse					
Clinical_Profile C	Registered Nurse					
Clinical_Profile D	Registered Nurse					
Clinical_Profile G	Registered Nurse					
Clinical_ProfileA	Registered Nurse					
Clinica_profile ...	Registered Nurse					
Consulting Ana...	Anesthesiologist	Consulting Anaesthesiologist				
ED Nurse	Registered Nurse					





































Creating New Clinical Profiles

Typically, you need a Care Role associated with a Clinical Profile. However, in some instances, you may have a Clinical Profile without a Care Role. For example, an IT administrator does not need a Care Role but you may want to assign them a Clinical Profile with a specific set of permissions.

Clinical Profiles can have the same name as the Care Role.

1. To add a new Clinical Profile, click **Create New**.

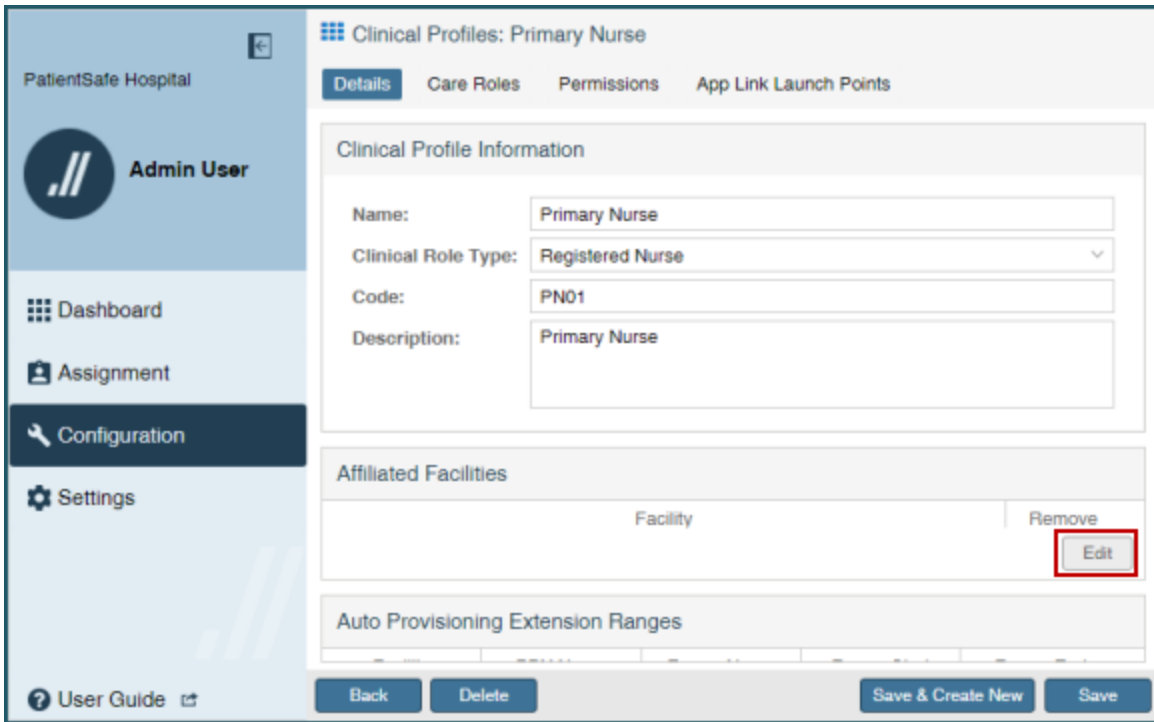


Clinical Profiles				
Search by name or description				
Name ↑	Clinical Role Type	Description	Edit	Delete
Case Manager	Other	This is the case manager for a patient		
Certified Nurse	Certified Nurse-...			
Certified Nursin...	Patient Care Te...	This is a certified nursing assistant		
Charge Nurse	Registered Nurse	This is the charge nurse for the unit		
Clinical Profile E	Registered Nurse			
Clinical Profile FL	Registered Nurse			
Clinical Profile I	Registered Nurse			
Clinical Profile R	Registered Nurse			
Clinical Profile R1	Registered Nurse			
clinical profile_r...	Registered Nurse			
Clinical_Profile B	Registered Nurse			
Clinical_Profile C	Registered Nurse			
Clinical_Profile D	Registered Nurse			
Clinical_Profile G	Registered Nurse			
Clinical_ProfileA	Registered Nurse			
Clinica_profile ...	Registered Nurse			
Consulting Ana...	Anesthesiologist	Consulting Anaesthesiologist		
ED Nurse	Registered Nurse			

Details

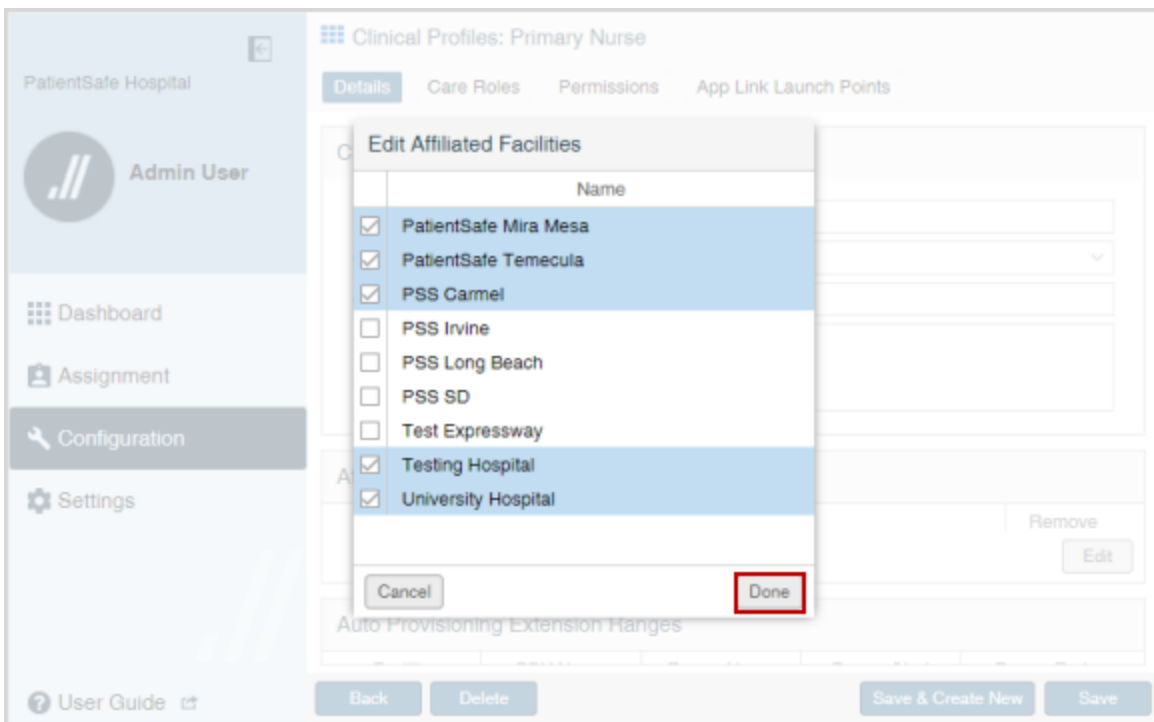
Complete the following fields:

1. Name (required)
2. Clinical Role Type - Required field. This list is fixed across all facilities and is used for Analytics reporting.
3. Code (required): The code is a unique identifier that is used to integrate with the Clinical Server.
4. Description (optional)
5. Click **Edit** under Affiliated Facilities.



6. Select one or more associated facilities.

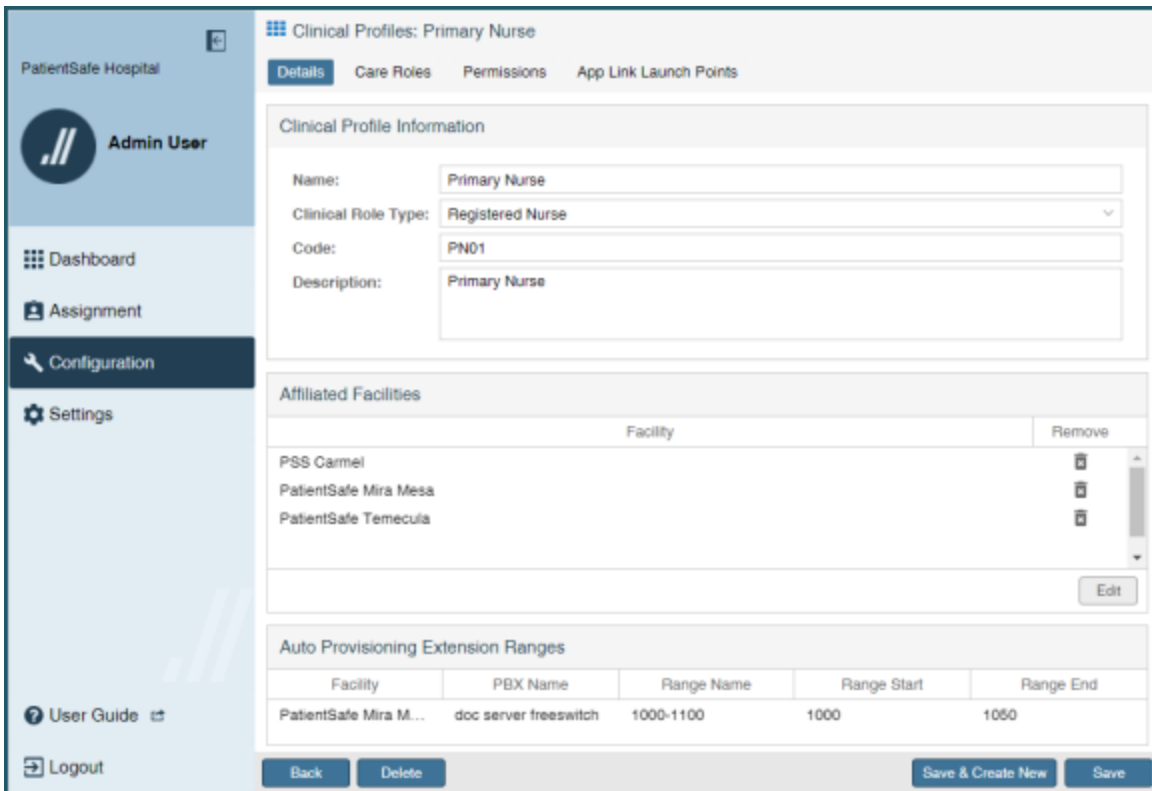
7. Click **Done**.



Auto Provisioning Extension Ranges

If the clinical profile has been configured to automatically provide an extension to users upon initial log in, the set of extension numbers will display here.

1. Click on the range of extensions to view Settings>Voice Systems.



Clinical Profiles: Primary Nurse

Details Care Roles Permissions App Link Launch Points

Clinical Profile Information

Name: Primary Nurse
 Clinical Role Type: Registered Nurse
 Code: PN01
 Description: Primary Nurse

Affiliated Facilities

Facility	Remove
PSS Carmel	
PatientSafe Mira Mesa	
PatientSafe Temecula	

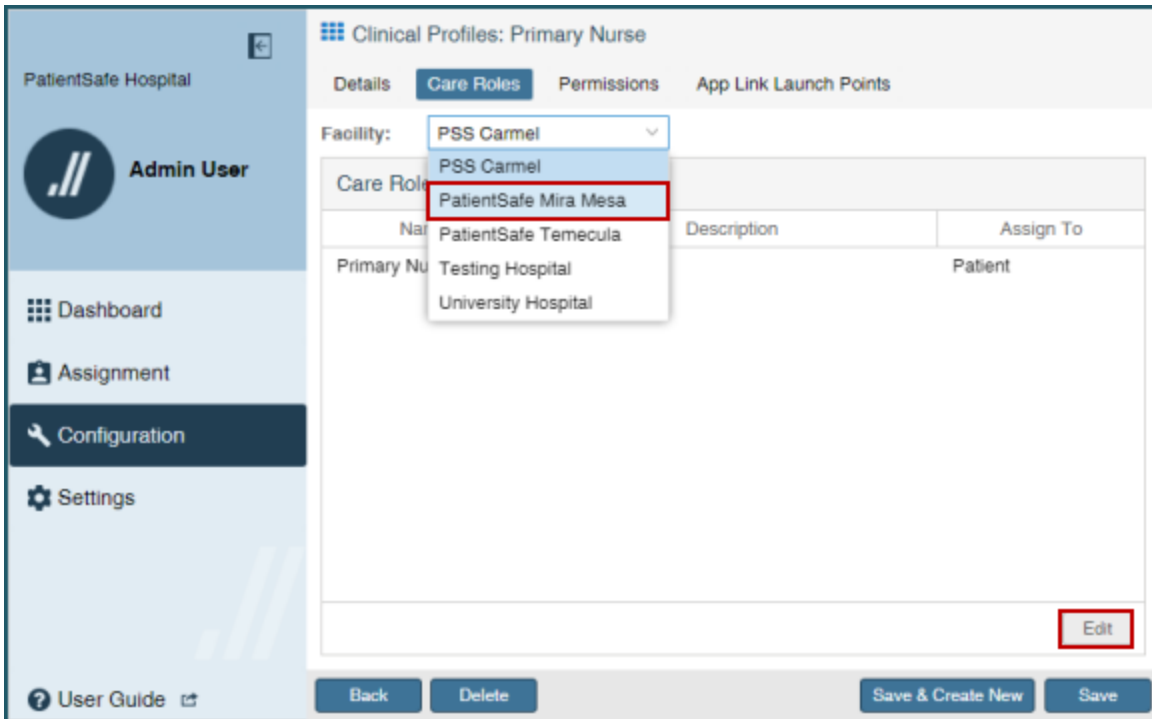
Auto Provisioning Extension Ranges

Facility	PBX Name	Range Name	Range Start	Range End
PatientSafe Mira M...	doc server freeswitch	1000-1100	1000	1050

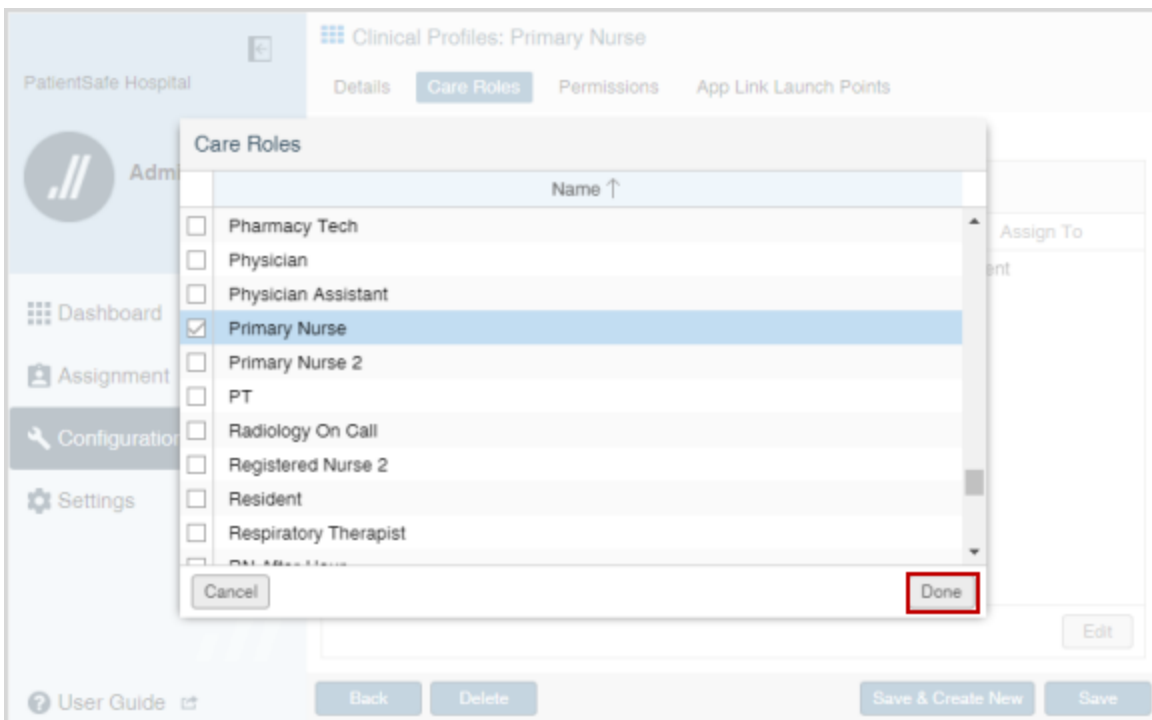
Back Delete Save & Create New Save

Care Roles

1. Select the specific facility for which you want to add Care Role(s).
2. Click **Edit** to add Care Role(s) for the Clinical Profile.

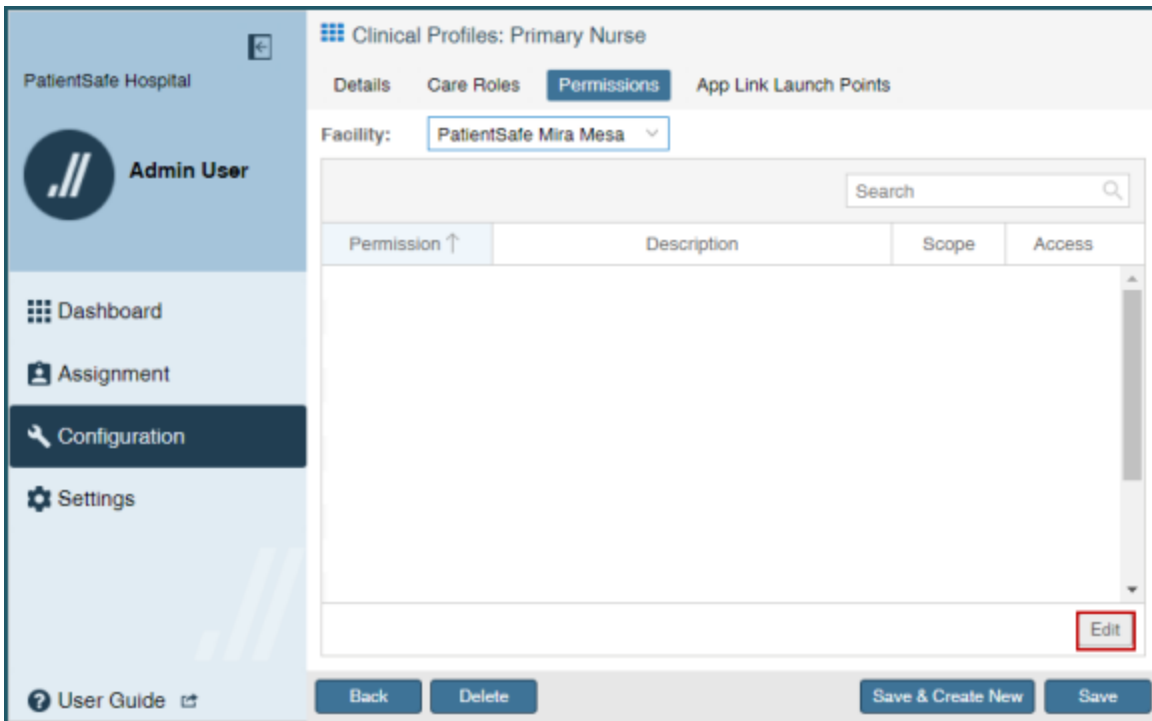


3. Select the desired Care Role(s) from the list.
4. Click **Done**.

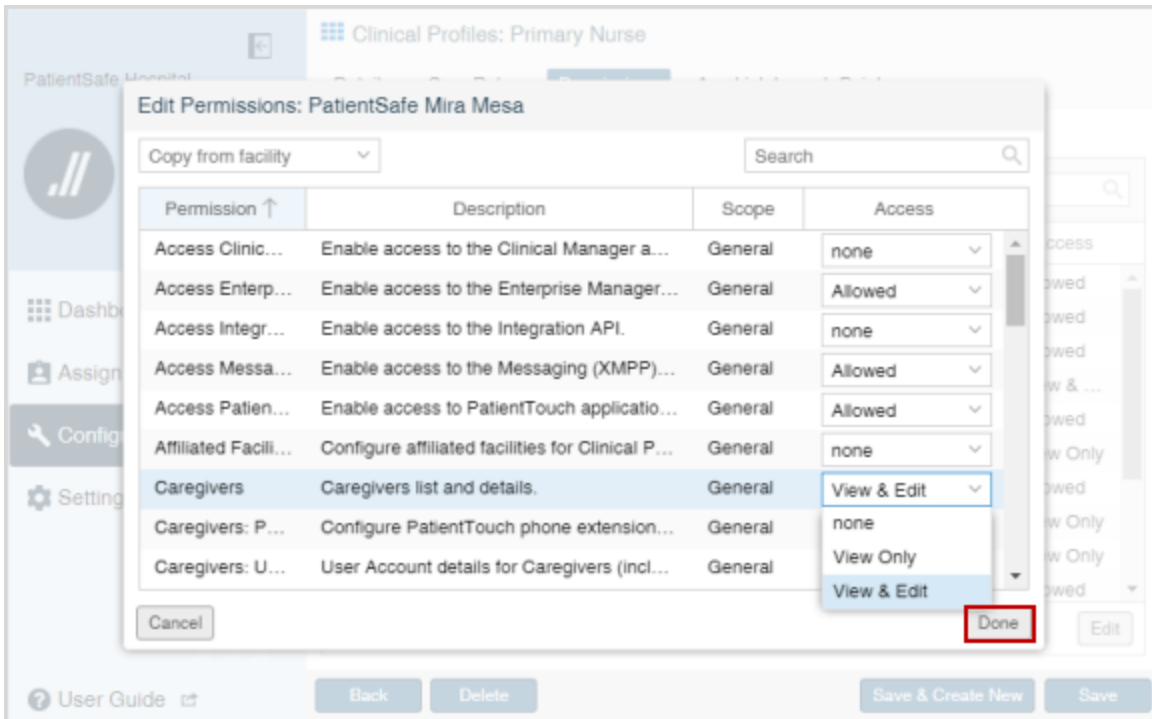


Permissions

1. Select the facility for which you want to add/modify permissions. The permissions apply to only the Clinical Profile.
2. Click **Edit** to add the permissions for the Clinical Profile.



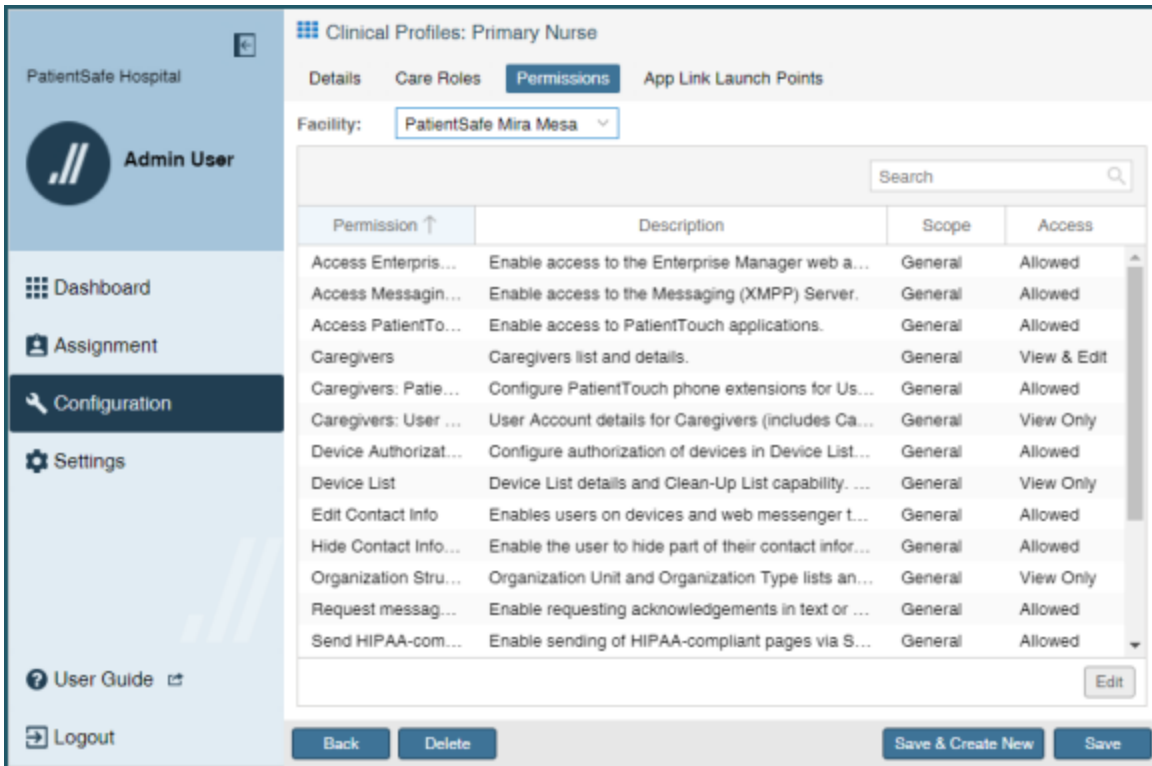
3. The list of permissions displays with the Permission Name, Description, Scope, and Access.
 - **General** permissions apply to all facilities.
 - **Facility** permissions only pertain to the selected facility.
4. Select the Access drop down menu and choose Allowed, View Only, or View & Edit.
5. Click **Done** when you are finished.



App Link Launch Points

Customers are actively using Epic Haiku and Rover and want to seamlessly link from these third party apps to PatientTouch. If your hospital is configured for this feature, clinical profiles will be assigned App Link Launch Points. In other words, Epic Haiku or Rover buttons will appear in the designated locations on the PatientTouch application.

1. Click App Link Launch Points.



Clinical Profiles: Primary Nurse

Details Care Roles **Permissions** App Link Launch Points

Facility: PatientSafe Mira Mesa

Search

Permission ↑	Description	Scope	Access
Access Enterpris...	Enable access to the Enterprise Manager web a...	General	Allowed
Access Messagin...	Enable access to the Messaging (XMPP) Server.	General	Allowed
Access PatientTo...	Enable access to PatientTouch applications.	General	Allowed
Caregivers	Caregivers list and details.	General	View & Edit
Caregivers: Patie...	Configure PatientTouch phone extensions for Us...	General	Allowed
Caregivers: User ...	User Account details for Caregivers (includes Ca...	General	View Only
Device Authorizat...	Configure authorization of devices in Device List...	General	Allowed
Device List	Device List details and Clean-Up List capability. ...	General	View Only
Edit Contact Info	Enables users on devices and web messenger t...	General	Allowed
Hide Contact Info...	Enable the user to hide part of their contact infor...	General	Allowed
Organization Stru...	Organization Unit and Organization Type lists an...	General	View Only
Request messag...	Enable requesting acknowledgements in text or ...	General	Allowed
Send HIPAA-com...	Enable sending of HIPAA-compliant pages via S...	General	Allowed

Back Delete Save & Create New Save

All of the App Link Launch Points display for this clinical profile. The Name field indicates the name of the button that will display on the PatientTouch screens. The Type field indicates the screen where the button will be located:

- Patient : patient-info screen and patient-context screen (individual patient)
- Patient List : assignments/unit-browse screens
- Use : contact-detail screen (individual contact)
- Schedule : currently not used

2. Double-click on a Launch Point to view more detailed information.

Clinical Profiles: Primary Nurse

Details Care Roles Permissions **App Link Launch Points**

Facility: PatientSafe Mira Mesa

Name	Description	Type
Epic Haiku	User; Mira Mesa & Temecula; all care-roles	User
Epic Haiku	Patient; Mira Mesa & Temecula; all care-roles	Patient
Epic Haiku	Patient-List; Temecula & Mira Mesa, all care-roles	Patient List
test	test	User

Buttons: Back, Delete, Save & Create New, Save

3. The App Link Launch Point configuration screen displays. View or modify data as necessary.

App Link Launch Point

Details

Name: Epic Haiku

Link: epichaiku://launch/loginname/Susername

Description: User; Mira Mesa & Temecula; all care-roles

Type: User

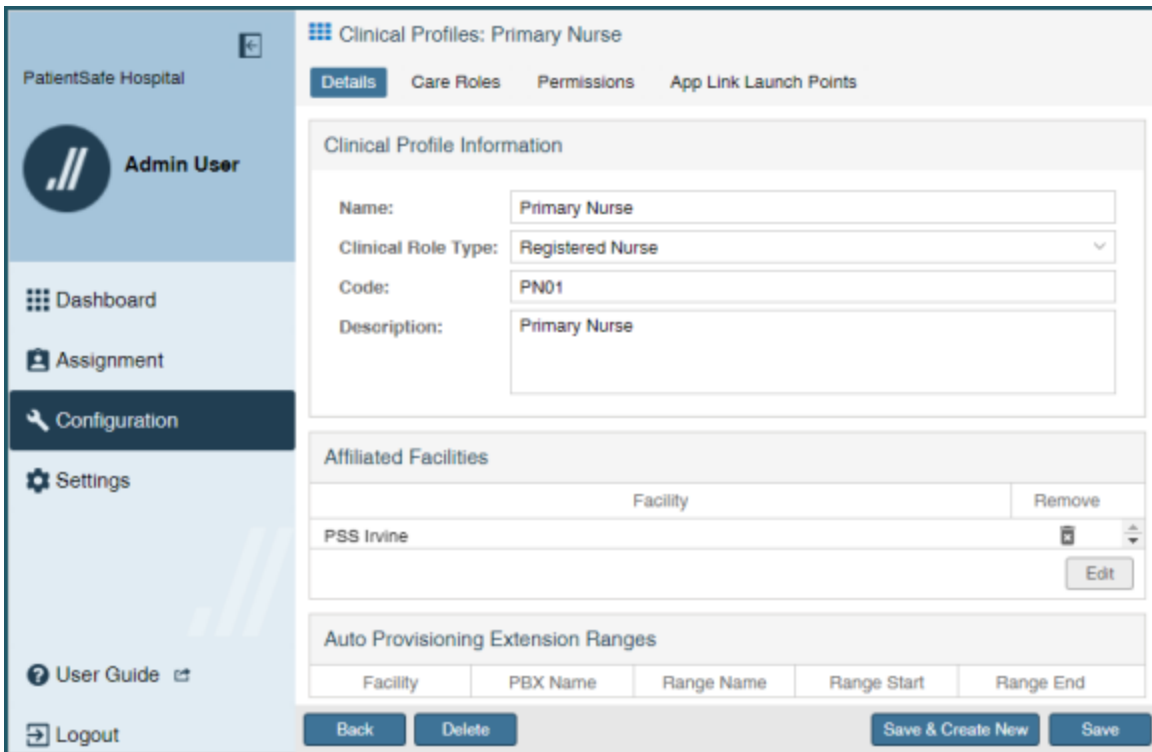
Available To (Clinical Profiles)

Clinical Profile ↑	Facilities	Remove
Physical Therapy	PatientSafe Temecula, PatientSafe Mira Mesa	✖
Physician	PatientSafe Mira Mesa, PSS Carmel, PatientSafe Temecula	✖
PRAY-ClinicalProfile	PatientSafe Mira Mesa	✖
Primary Nurse	PatientSafe Hospital, PatientSafe Mira Mesa, Testing Hospit...	✖
Radiology	PatientSafe Mira Mesa	✖
Registered Nurse	PatientSafe Temecula, PatientSafe Mira Mesa	✖
Resident Physician	PatientSafe Temecula, PatientSafe Mira Mesa	✖
Respiratory Therapist	PatientSafe Mira Mesa, PatientSafe Temecula	✖
SD Nurse	PSS Carmel, PatientSafe Mira Mesa, PatientSafe Temecula	✖

Buttons: Back, Delete, Save & Create New, Save

Saving Newly Created Clinical Profiles

1. If you have more Clinical Profiles to create, click **Save & Create New** to save your current Clinical Profile and prepare to enter the next one.
2. If you have finished creating your new Clinical Profile, click **Save**.
3. Click the **Back** button at any time to return to the previous screen. If you have entered any information, you will receive a message asking if you want to save.



The screenshot displays the 'Clinical Profiles: Primary Nurse' configuration page. The left sidebar shows the user is logged in as 'Admin User' and provides navigation for Dashboard, Assignment, Configuration, Settings, User Guide, and Logout. The main content area has tabs for 'Details', 'Care Roles', 'Permissions', and 'App Link Launch Points'. Under 'Clinical Profile Information', there are input fields for Name (Primary Nurse), Clinical Role Type (Registered Nurse), Code (PN01), and Description (Primary Nurse). Below this is a table for 'Affiliated Facilities' with one entry 'PSS Irvine' and an 'Edit' button. At the bottom, there is a table for 'Auto Provisioning Extension Ranges' with columns for Facility, PBX Name, Range Name, Range Start, and Range End. Action buttons 'Back', 'Delete', 'Save & Create New', and 'Save' are located at the bottom of the page.

Editing Clinical Profiles

1. To edit a Clinical Profile, simply click the **Edit** icon to the right of the desired Clinical Profile.

PatientSafe Hospital		Clinical Profiles			
Admin User		Search by name or description			
Name ↑	Clinical Role Type	Description		Delete	
outside	Registered N...				
Pharmacist	Registered Ph...	This is a registered pharmacist			
Pharmacy Ma...	Other				
Phlebotomist	Certified Phle...	This is a phlebotomist user			
Physical Ther...	Physical Ther...	This is a certified physical therapist			
Physician	Doctor of Med...	Doctor			
Primary Nurse	Registered N...	Primary Nurse			
Registered N...	Registered N...	This is a clinician with an RN degree			
Resident Phy...	Doctor of Med...	This is a physician in resident pro...			
Respiratory T...	Respiratory T...	This is a certified respiratory thera...			
SD Nurse	Doctor of Med...				
Speech Therapy	Speech-Lang...	This is a certified speech therapist			
Team Nurse	Registered N...				
test	Registered N...	sss			
test01	Registered N...				
Transport	Transport	This is a transport technician in th...			
Unit Secretary	Other	This is the unit secretary for the unit			
VSTestCareP...	Registered N...				

2. Or, double-click an individual Clinical Profile.
3. Edit any of the Details, Care Roles, Permissions, and App Link Launch Points tabs.

PatientSafe Hospital

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Clinical Profiles: Primary Nurse

Details | Care Roles | Permissions | App Link Launch Points

Clinical Profile Information

Name: Primary Nurse

Clinical Role Type: Registered Nurse

Code: PN01

Description: Primary Nurse

Affiliated Facilities

Facility	Remove
PSS Irvine	

Edit

Auto Provisioning Extension Ranges

Facility	PBX Name	Range Name	Range Start	Range End

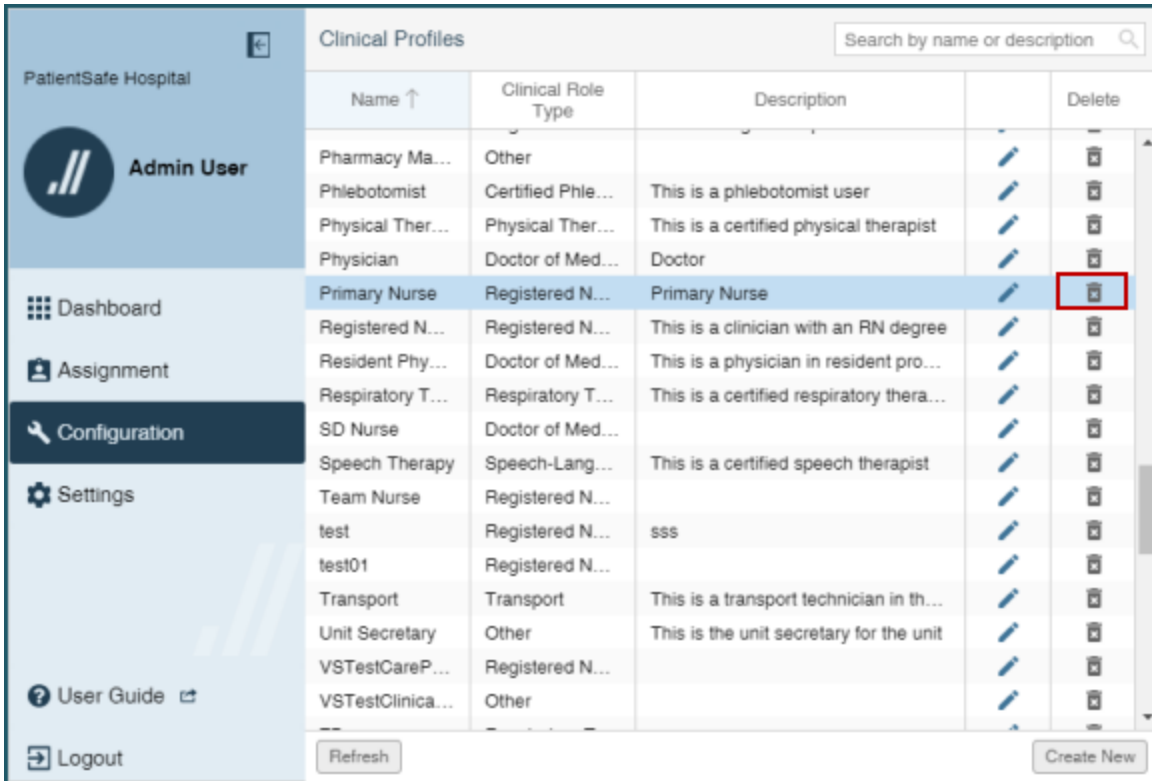
Back | Delete | Save & Create New | Save

4. Click **Save** when you are done.

Deleting Clinical Profiles

Users with the appropriate privileges can delete a Clinical Profile by one of two methods:

1. Click the **Delete** icon to the right of the selected Clinical Profile.



The screenshot displays the 'Clinical Profiles' management screen in the PatientSafe Hospital system. The interface includes a sidebar with navigation options: Dashboard, Assignment, Configuration (selected), Settings, User Guide, and Logout. The main content area shows a table of clinical profiles. The 'Primary Nurse' profile is selected, and its delete icon is highlighted with a red box.

Name ↑	Clinical Role Type	Description		Delete
Pharmacy Ma...	Other			
Phlebotomist	Certified Phle...	This is a phlebotomist user		
Physical Ther...	Physical Ther...	This is a certified physical therapist		
Physician	Doctor of Med...	Doctor		
Primary Nurse	Registered N...	Primary Nurse		
Registered N...	Registered N...	This is a clinician with an RN degree		
Resident Phy...	Doctor of Med...	This is a physician in resident pro...		
Respiratory T...	Respiratory T...	This is a certified respiratory thera...		
SD Nurse	Doctor of Med...			
Speech Therapy	Speech-Lang...	This is a certified speech therapist		
Team Nurse	Registered N...			
test	Registered N...	sss		
test01	Registered N...			
Transport	Transport	This is a transport technician in th...		
Unit Secretary	Other	This is the unit secretary for the unit		
VSTestCareP...	Registered N...			
VSTestClinica...	Other			

2. Or, from the Edit screen click **Delete** from the bottom left hand corner.

Searching for Existing Clinical Profiles

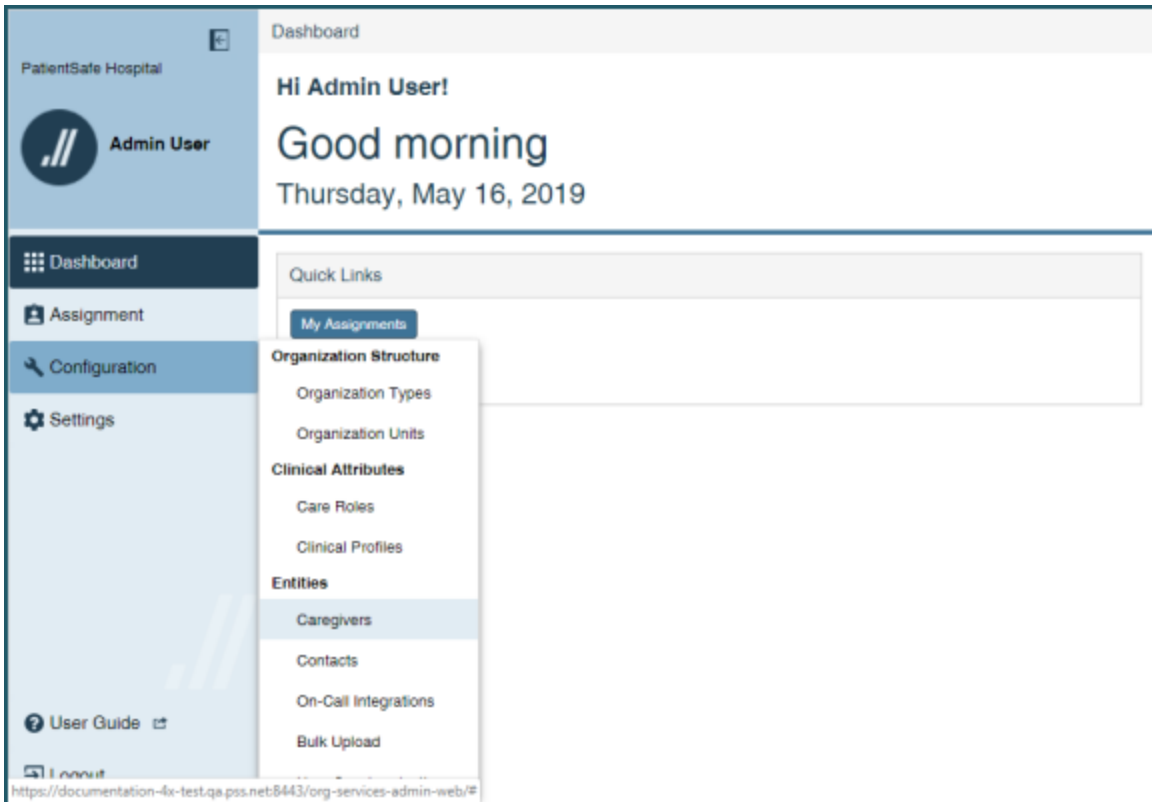
To search the existing list of Clinical Profiles, enter your key words for Name or Description into the Search field.

Name ↑	Clinical Role Type	Description	Edit	Delete
Primary Nurse	Registered Nurse	Primary Nurse		
Primary Nurse 2	Registered Nurse			

Caregivers

Viewing Existing Caregivers

1. From the Dashboard, click Configuration>Caregivers.



1. A full list of existing Caregivers displays with the Last Name, First Name, Job Title, Credentials, Username, Badge ID, and PatientTouch ID as well as the option to Edit or Delete Caregivers.
2. The default is to display All in the Facilities drop down menu. To see Caregivers for a specific site, select it from the Facility drop down menu.
3. Sort any category in either Ascending or Descending order by clicking the small up/down arrow to the right of each field. You can also access the Show Options tab to list Caregivers only, or include Deactivated users.
4. If there is more than one screen of Caregivers, arrows will display at the bottom of the screen. Click the single right arrow to navigate to the next screen. Click the double right arrows to navigate to the end screen.

PatientSafe Hospital
 Admin User
 Dashboard
 Assignment
Configuration
 Settings
 User Guide
 Logout

Caregivers Facility: **All** Search

Show Options
 Show deactivated Caregivers
 Show User Accounts only
 Show system users

			Username	Badge ID	PatientTouch ID	Edit	Delete
			pable	1123	pable@qa.pss.net		
Abney	Steve	Surgeon	sabney	1132	sabney@qa.pss.net		
Abundy	Malcolm	Phlebot...	mabundy		mabundy@qa.pss....		
Addams	Jane	LSW	jaddams	jaddams			
Adirondack	Mitch	IT Direc...	madirondack	1117	madirondack@qa....		
Atfermuff	Robert	Physica...	raftermuth	1121	raftermuth@qa.pss....		
Affiliated F...	Zohreh		zaf	zaf	zaf@qa.pss.net		
Atirth	Joe	Janitor	jafirth	1120	jafirth@qa.pss.net		
Airbus	Kelly	Respira...	kairbus	1122	kairbus@qa.pss.net		
Alexander,...	Joseph	Urology	aj1	aj1	aj1@qa.pss.net		
Amber	Karen	Unit Se ...	kadonerson	1119	kadonerson@qa.p...		
Anderson	Becky	Registe...	banderson	1112	banderson@qa.pss....		
Anderson	Abby	Registe...	aanderson	aa	aanderson@qa.pss....		
anne	barbara	nurse	barbarab	barbarab	barbarab@qa.pss....		
Applebee	John	Anesth...	japplebee	1111	japplebee@qa.pss....		
Arundell	Jay	Physician	jarundell	1118	jarundell@qa.pss.net		
Assignment	Zohreh		zassign	zassign	zassign@qa.pss.net		
Assignme...	Zohreh	This us ...	zassignself	zassign...	zassignself@qa.ps...		
b	arifei		arifei	arifei	arifei@qa.pss.net		

Page 2 of 16 | 26 - 50 of 378 Create New

Create New Caregiver

1. To add a new Caregiver, click **Create New**.

PatientSafe Hospital		Caregivers		Facility:	All	Search			
Admin User		Show Options							
Last Name ↑	First Name	Job Title	Username	Badge ID	PatientTouch ID	Edit	Delete		
Able	Paul	Surge...	pable	1123	pable@qa.pss....				
Abney	Steve	Surge...	sabney	1132	sabney@qa.ps...				
Abundy	Malcolm	Phleb...	mabundy	1116	mabundy@qa....				
Addams	Jane	LSW	jaddams	jadda...					
Adirond...	Mitch	IT Dir...	madirondack	1117	madirondack@...				
Affernuff	Robert	Physi...	raffernuth	1121	raffernuth@qa....				
Affiliate...	Zohreh		zaf	zaf	zaf@qa.pss.net				
Afirth	Joe	Janitor	jafirth	1120	jafirth@qa.pss....				
Airbus	Kelly	Respi...	kairbus	1122	kairbus@qa.ps...				
Alexand...	Joseph	Urology	aj1	aj1	aj1@qa.pss.net				
Amber	Karen	Unit S...	kadonerson	1119	kadonerson@q...				
Anderson	Becky	Regis...	banderson	1112	banderson@qa...				
Anderson	Abby	Regis...	aanderson	aa	aanderson@qa...				
anne	barbara	nurse	barbarab	barba...	barbarab@qa.p...				
Applebee	John	Anest...	japplebee	1111	japplebee@qa....				
Arundell	Jay	Physi...	jarundell	1118	jarundell@qa.p...				
Assign...	Zohreh		zassign	zassign	zassign@qa.ps...				
Assign...	Zohreh	This u...	zassignself	zassi...	zassignself@q...				
b	arifel		arifel	arifel	arifel@qa.pss....				

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Create New

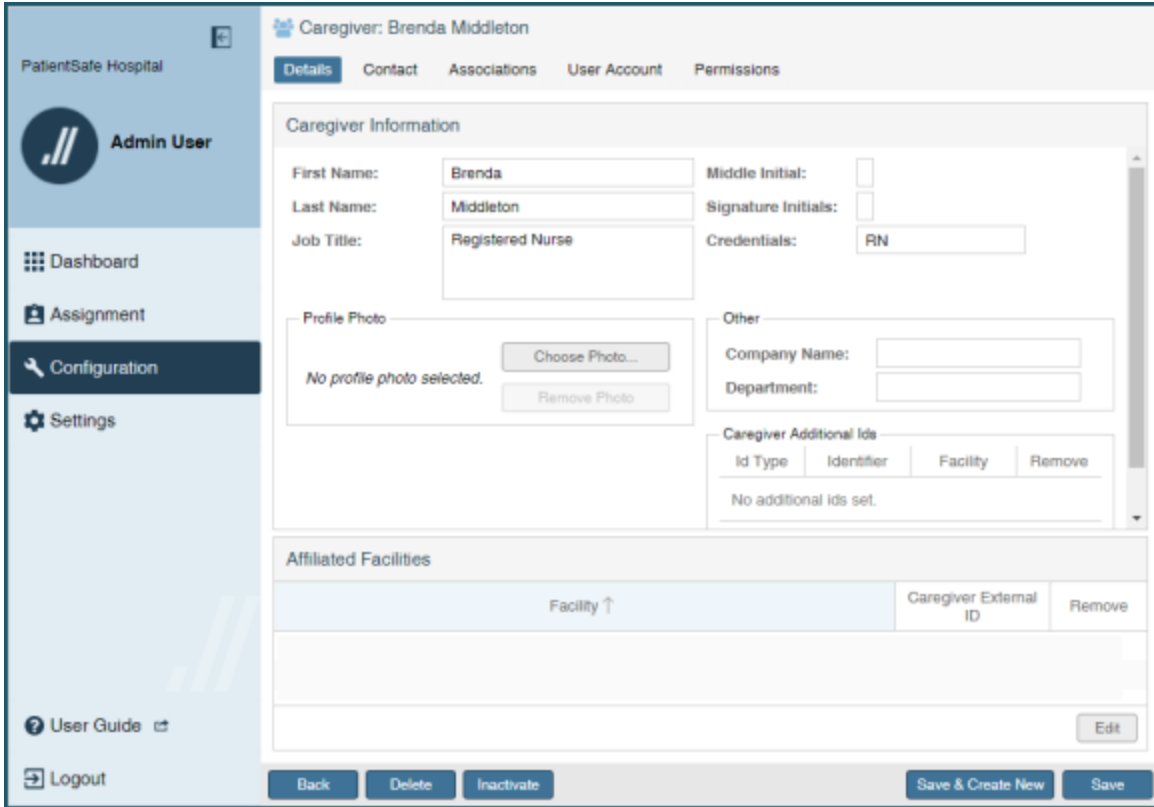
Details

2. Complete the following fields:

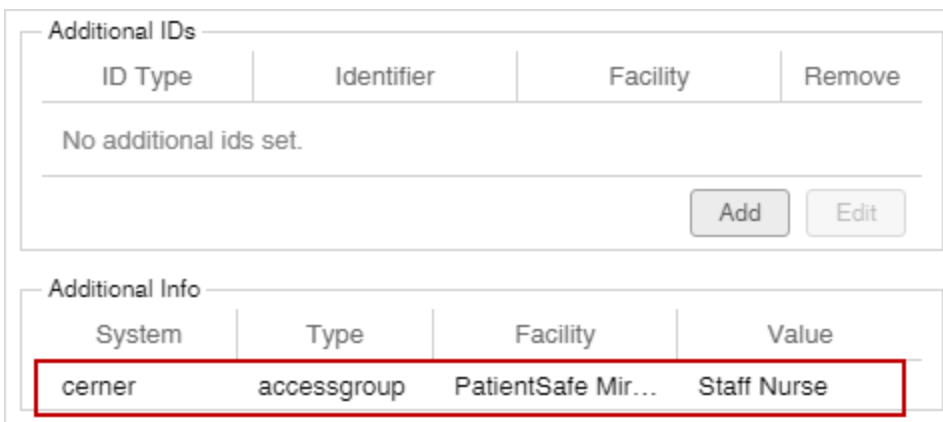
- First Name (optional)
- Middle Initial (optional)
- Last Name (required)
- Signature Initials (required)
- Job Title (optional)
- Credentials (optional)
- Company Name (optional)
- Department (optional)

3. If you want to add a photo of the caregiver, you must save the information first.

4. Click **Save**.



5. Click **Choose Photo...** to add a picture of the caregiver. This image will display on the PatientTouch Communications client application.
6. Click **Add** to enter an **Caregiver Additional Id**. This Id links the user to an external system such as Active Directory (AD).
7. Scroll down to see the Additional Info section (see image below). If a caregiver belongs to an **access group**, their access group name will display. In the example below, the caregiver's access group is Staff Nurse. This is a non-editable field.



8. Click **Edit** to select **Affiliated Facilities**.

PatientSafe Hospital Caregiver: Brenda Middleton

[Details](#) [Contact](#) [Associations](#) [User Account](#) [Permissions](#)

Admin User

- Dashboard
- Assignment
- Configuration
- Settings


User Guide [User Guide](#)

Logout

Caregiver Information

Last Name: Middleton Signature Initials:

Job Title: Registered Nurse Credentials: RN

Profile Photo: 

Other

Company Name:

Department:

Caregiver Additional Ids

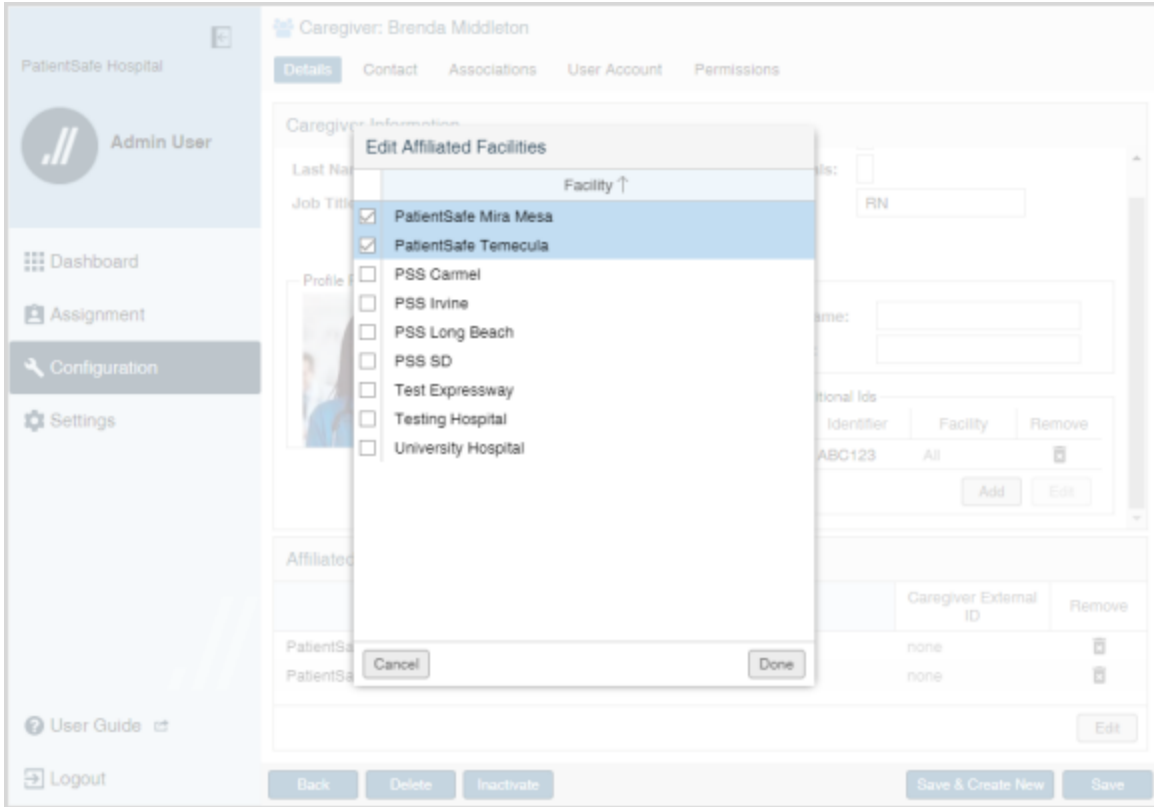
Id Type	Identifier	Facility	Remove
No additional ids set.			

Affiliated Facilities

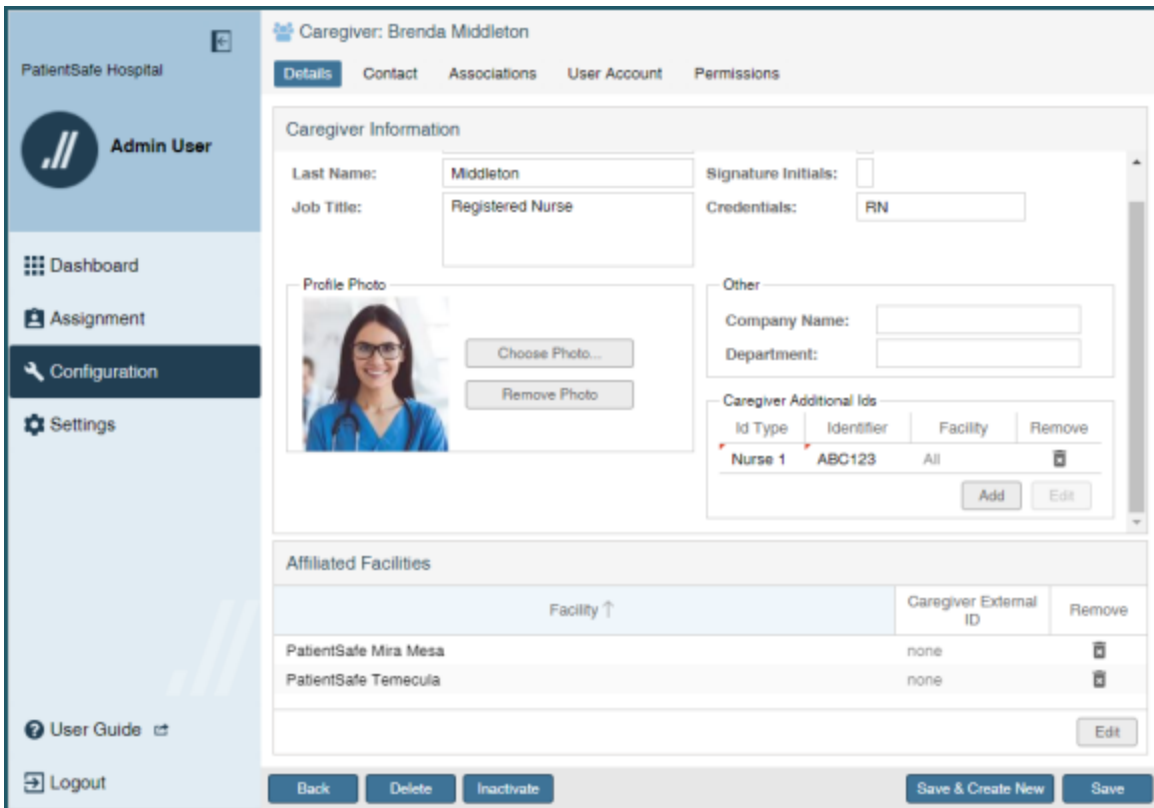
Facility ↑	Caregiver External ID	Remove

9. Select one or more facilities for the caregiver.

10. Click **Done** when you are finished.



Note After you select the affiliated facilities, the Associations tab becomes active.

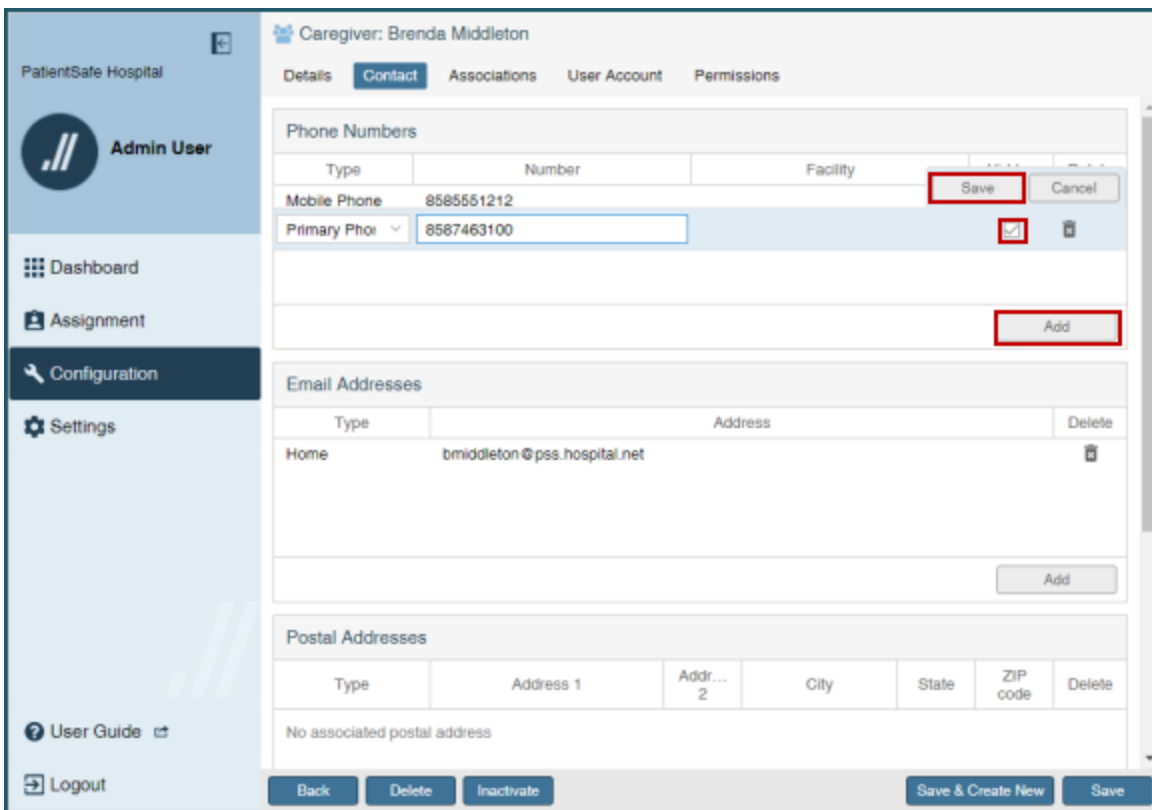


Note The **Caregiver External ID** is from an integrated system like Active Directory or an EMR/ADT system. When you select the affiliated facility, the external ID field is automatically populated (if applicable).

Contact

The Contact tab allows you to enter your contact information: phone numbers, email addresses, postal addresses, and messaging JID.

1. Click **Add** under each of the contact types.
2. Select the "type" from the drop down menu.
3. Enter the phone number, email address, postal address, or JID (you can get this from the User Account tab).
4. Place a check mark the "Hidden" check box to hide that particular communication method, if you have the appropriate permission.
5. Click **Save**.



PatientSafe Hospital

Caregiver: Brenda Middleton

Details **Contact** Associations User Account Permissions

Admin User

Dashboard

Assignment

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Phone Numbers

Type	Number	Facility	
Mobile Phone	8585551212		Save Cancel
Primary Phor	8587463100		Save Delete
			Add

Email Addresses

Type	Address	Delete	
Home	bmiddleton@pss.hospital.net	Delete	
			Add

Postal Addresses

Type	Address 1	Addr... 2	City	State	ZIP code	Delete
No associated postal address						

Back Delete Inactivate Save & Create New Save

Associations

Use the Associations tab to select the Associated Clinical Profile(s) for the caregiver.

1. Select the appropriate facility from the drop down menu.

2. Click **Edit** underneath the Associated Clinical Profiles.

Caregiver: Brenda Middleton

Details Contact **Associations** User Account Permissions

Facility: PatientSafe Mira Mesa

Associated Clinical Profiles

Name ↑	Clinical Role Type	Description
No associated Clinical Profiles		

Edit

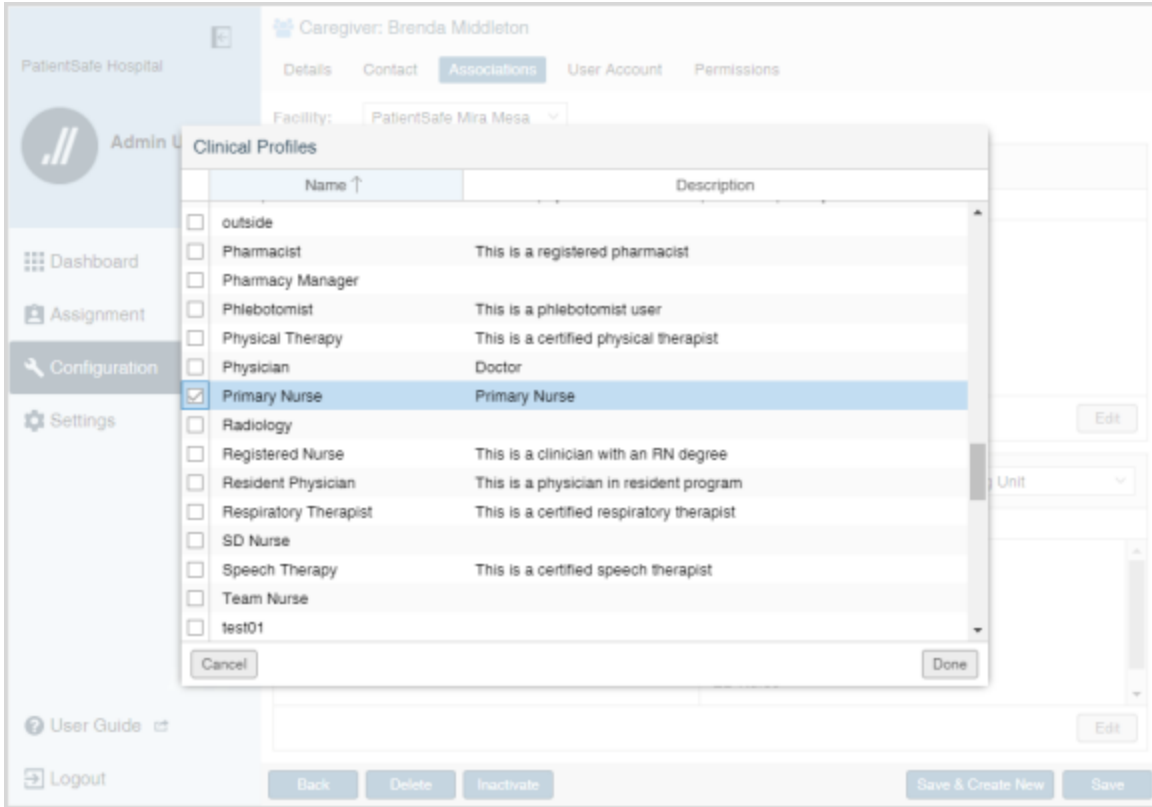
Associated Org Units Org Unit Type: Nursing Unit

Org Unit	Source(s)
----------	-----------

Edit

Back Delete Inactivate Save & Create New Save

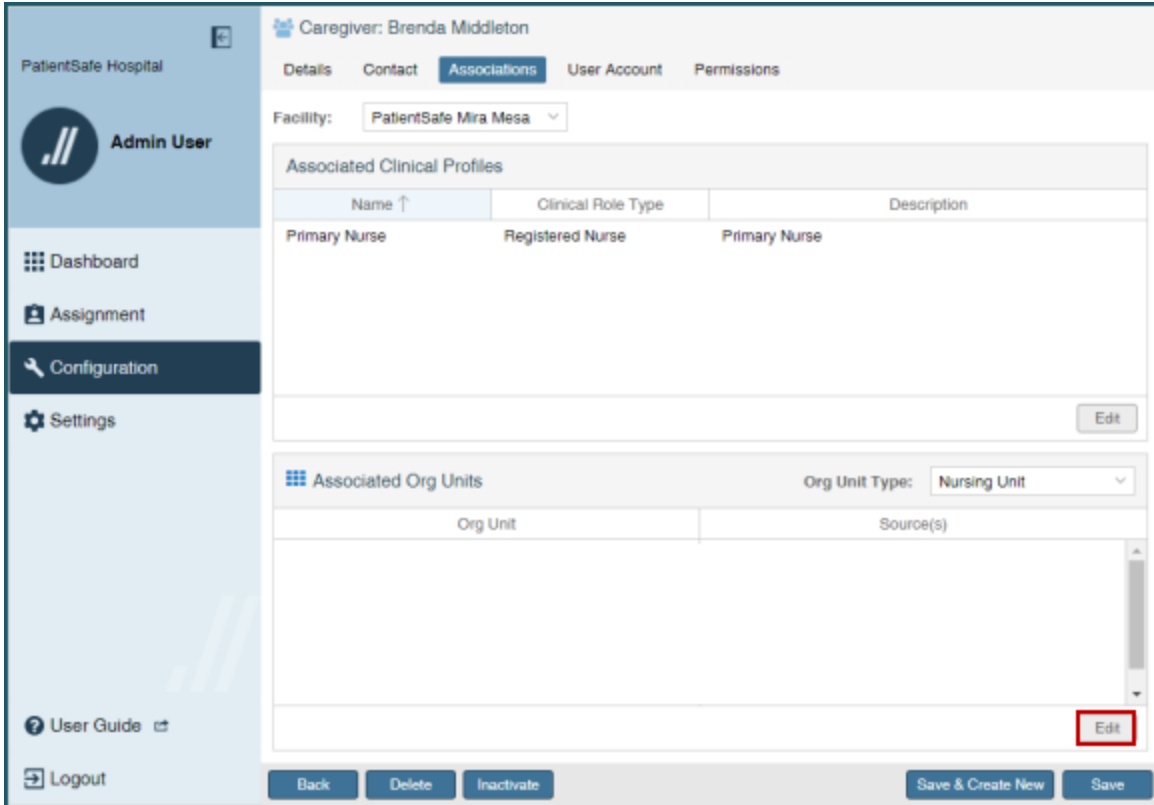
3. Select the desired clinical profile(s).
4. Click **Done** when you are finished.



The screenshot shows the PatientTouch Enterprise Manager interface. The top navigation bar includes 'PatientSafe Hospital', 'Caregiver: Brenda Middleton', and tabs for 'Details', 'Contact', 'Associations', 'User Account', and 'Permissions'. The 'Associations' tab is active. Below the navigation bar, there is a 'Facility:' dropdown menu set to 'PatientSafe Mira Mesa'. A 'Clinical Profiles' dialog box is open, displaying a table with columns for 'Name' and 'Description'. The 'Primary Nurse' profile is selected, indicated by a checked checkbox and a blue highlight. The dialog box also includes 'Cancel' and 'Done' buttons. The background interface shows a sidebar with 'Admin U', 'Dashboard', 'Assignment', 'Configuration', and 'Settings' options. At the bottom, there are buttons for 'Back', 'Delete', 'Inactivate', 'Save & Create New', and 'Save'.

	Name ↑	Description
<input type="checkbox"/>	outside	
<input type="checkbox"/>	Pharmacist	This is a registered pharmacist
<input type="checkbox"/>	Pharmacy Manager	
<input type="checkbox"/>	Phlebotomist	This is a phlebotomist user
<input type="checkbox"/>	Physical Therapy	This is a certified physical therapist
<input type="checkbox"/>	Physician	Doctor
<input checked="" type="checkbox"/>	Primary Nurse	Primary Nurse
<input type="checkbox"/>	Radiology	
<input type="checkbox"/>	Registered Nurse	This is a clinician with an RN degree
<input type="checkbox"/>	Resident Physician	This is a physician in resident program
<input type="checkbox"/>	Respiratory Therapist	This is a certified respiratory therapist
<input type="checkbox"/>	SD Nurse	
<input type="checkbox"/>	Speech Therapy	This is a certified speech therapist
<input type="checkbox"/>	Team Nurse	
<input type="checkbox"/>	test01	

5. Click **Edit** underneath the Associated Org Units.



Caregiver: Brenda Middleton

Details Contact **Associations** User Account Permissions

Facility: PatientSafe Mira Mesa

Associated Clinical Profiles

Name ↑	Clinical Role Type	Description
Primary Nurse	Registered Nurse	Primary Nurse

Edit

Associated Org Units Org Unit Type: Nursing Unit

Org Unit	Source(s)

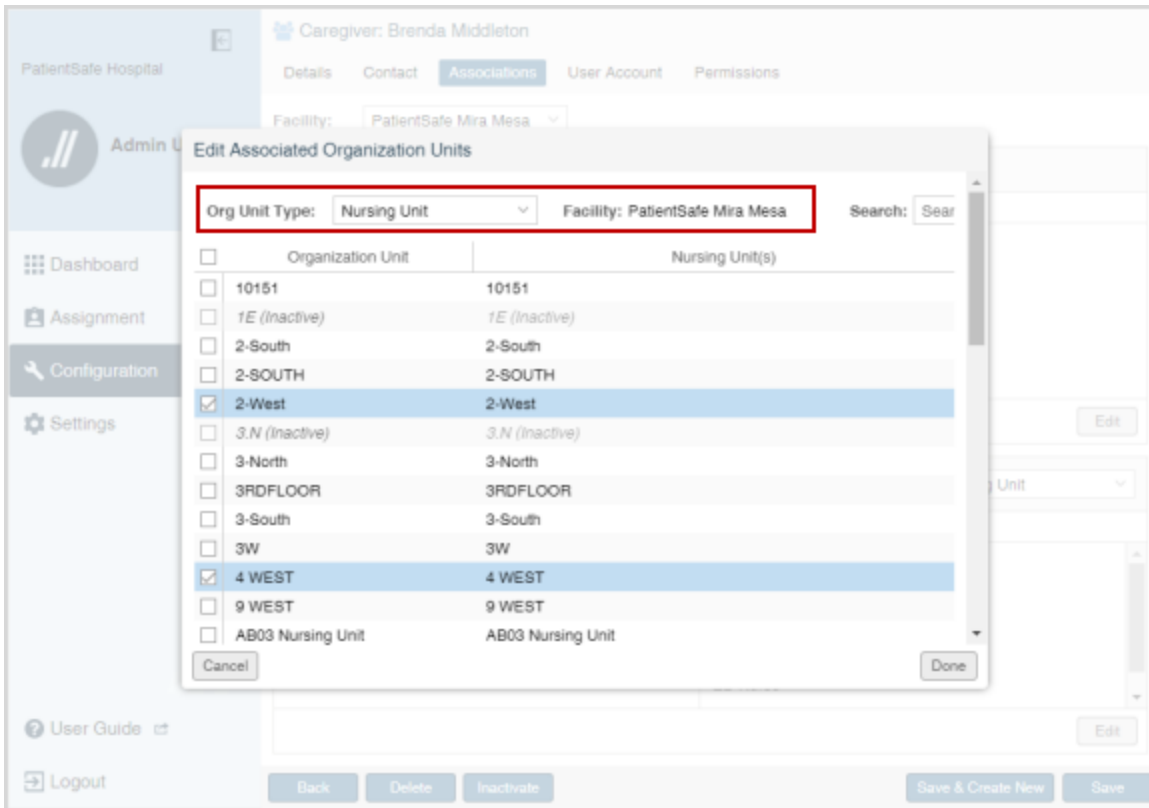
Edit

Back Delete Inactivate Save & Create New Save

6. Select the desired Nursing Units.

Note Ensure the proper Org Unit Type and Facility are selected at the top of the screen.

7. Click **Done** when you are finished.

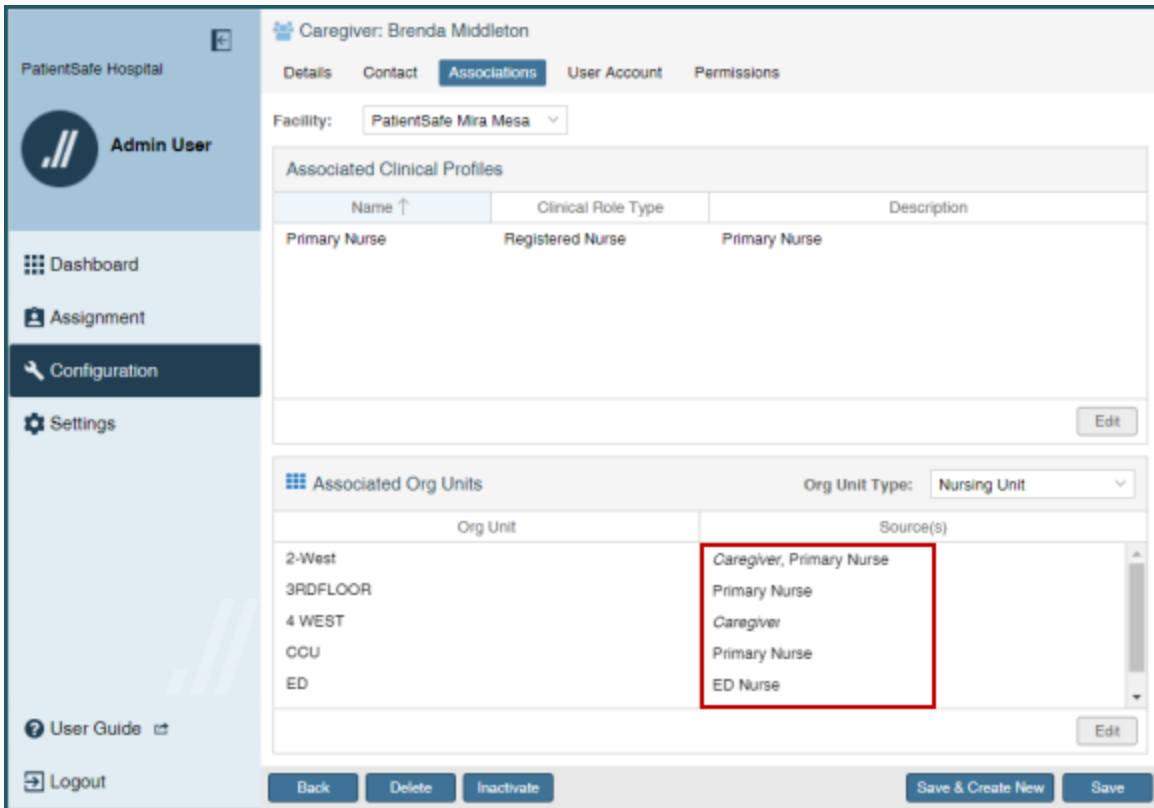


Org Unit Type: Nursing Unit Facility: PatientSafe Mira Mesa Search: Search

Organization Unit	Nursing Unit(s)
<input type="checkbox"/> 10151	10151
<input type="checkbox"/> 1E (Inactive)	1E (Inactive)
<input type="checkbox"/> 2-South	2-South
<input type="checkbox"/> 2-SOUTH	2-SOUTH
<input checked="" type="checkbox"/> 2-West	2-West
<input type="checkbox"/> 3.N (Inactive)	3.N (Inactive)
<input type="checkbox"/> 3-North	3-North
<input type="checkbox"/> 3RDFLOOR	3RDFLOOR
<input type="checkbox"/> 3-South	3-South
<input type="checkbox"/> 3W	3W
<input checked="" type="checkbox"/> 4 WEST	4 WEST
<input type="checkbox"/> 9 WEST	9 WEST
<input type="checkbox"/> AB03 Nursing Unit	AB03 Nursing Unit

Cancel Done

Note If an associated Nursing Unit is associated by a Care Role, then the Care Role name displays under the Source(s) column. If it is not associated by any Care Role but by the caregiver, then “Caregiver” displays.



Caregiver: Brenda Middleton

Details Contact **Associations** User Account Permissions

Facility: PatientSafe Mira Mesa

Associated Clinical Profiles

Name ↑	Clinical Role Type	Description
Primary Nurse	Registered Nurse	Primary Nurse

Edit

Associated Org Units Org Unit Type: Nursing Unit

Org Unit	Source(s)
2-West	Caregiver, Primary Nurse
3RDFLOOR	Primary Nurse
4 WEST	Caregiver
CCU	Primary Nurse
ED	ED Nurse

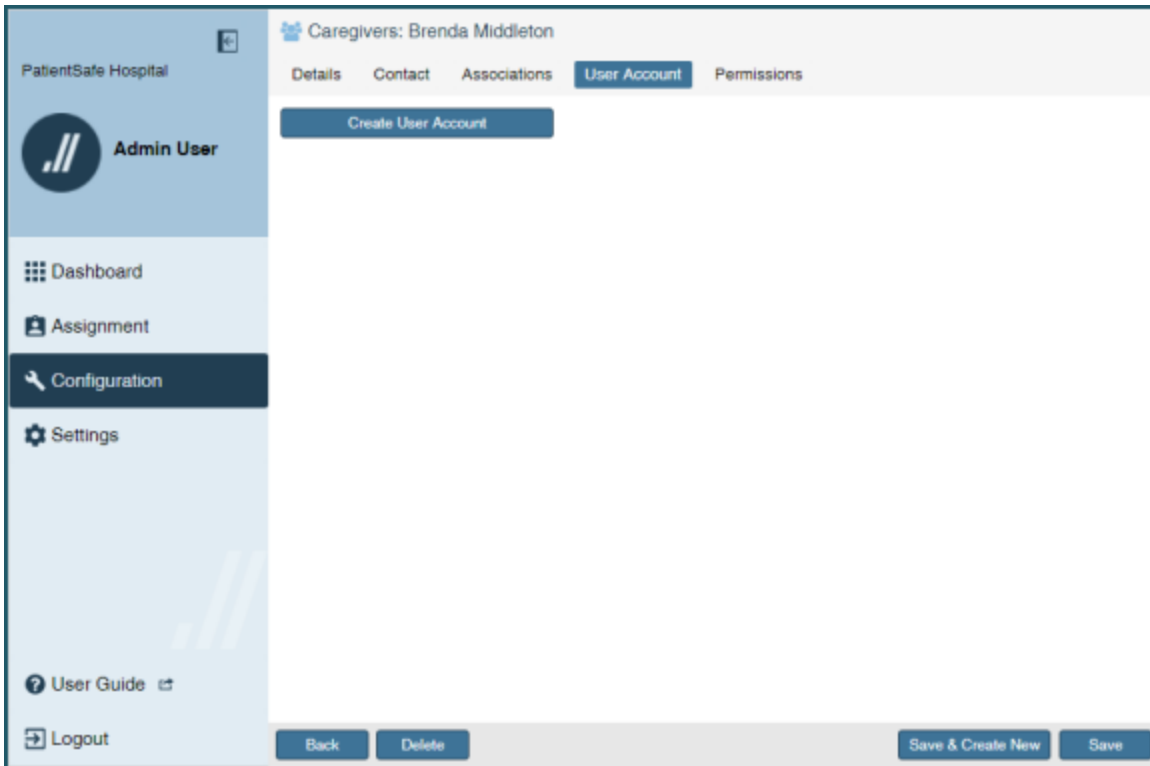
Edit

Back Delete Inactivate Save & Create New Save

User Account

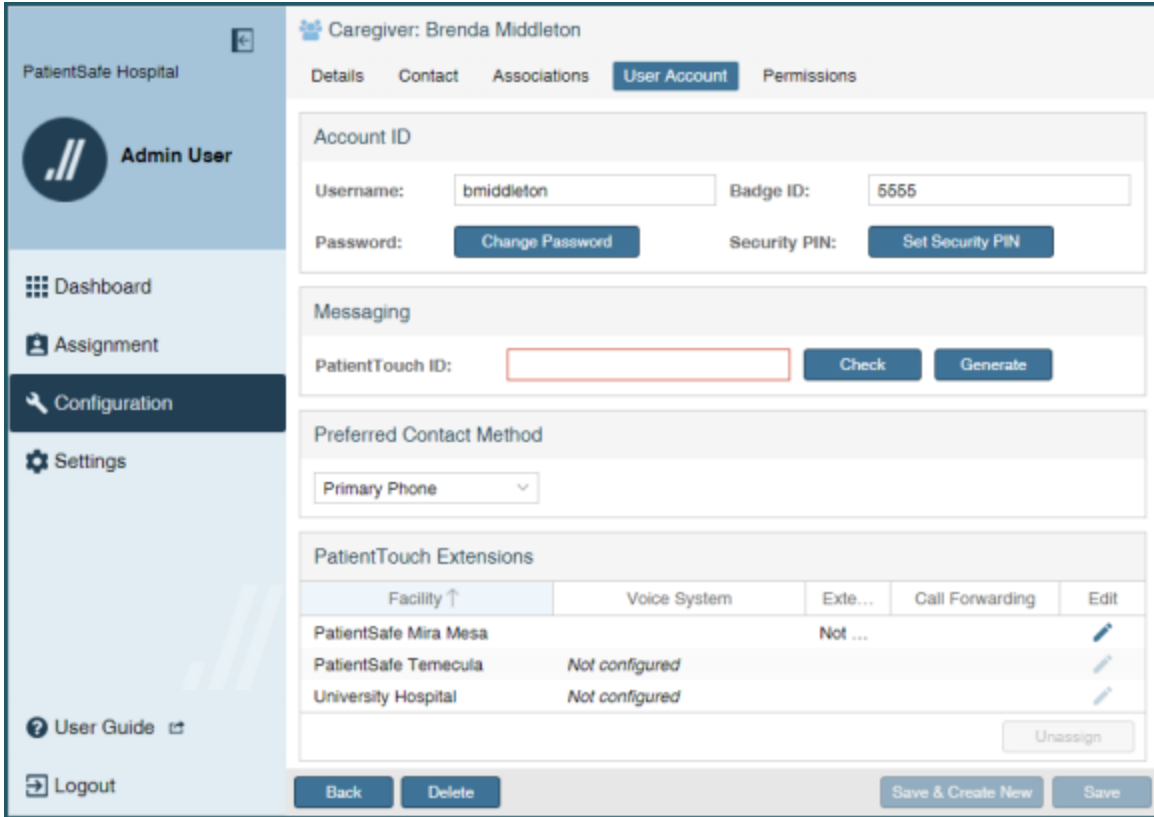
Use the User Account tab to set up a user name, password, pin, and messaging ID.

1. Click **Create User Account**.



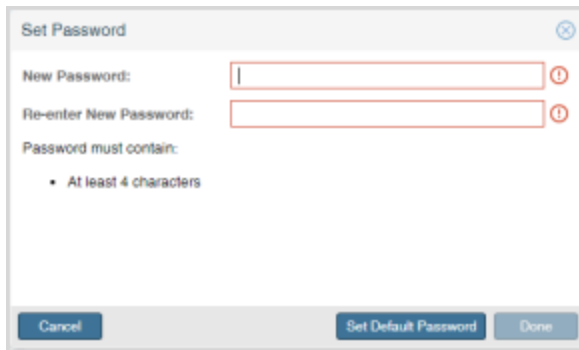
2. Use the information below to enter the Username and Badge ID:

- Username - This is the name users will enter to log into the Enterprise Manager, Web Messenger, and the PatientTouch Communications application.
- Badge ID: This is the set of numbers and or letters associated with the users badge. They will scan their badge to log into the Clinical Manager and the PatientTouch handheld.



3. Use the information below to set the Password and Pin.

Set Password

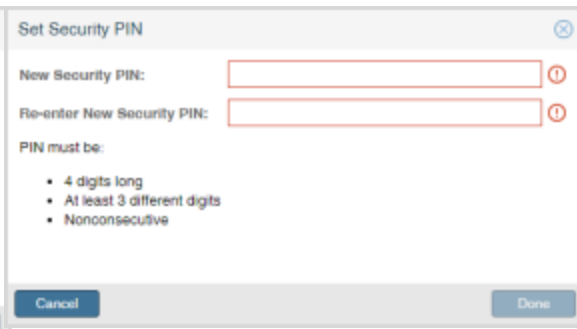


The password requirements are listed under Settings>Security and are configurable for each server. The same password is used for the Enterprise Manager, Clinical Manager, Web Messenger and PatientTouch.

Enter and Re-enter a new password.

Or, click Set Default Password to have Enterprise Manager automatically enter the system's default password.

Set Security Pin



The Security PIN is an optional field and only used for PatientTouch Communications - Android and iOS client and Web Messenger. Use the PIN to unlock the screen after it locks out after a configurable amount of time.

Enter and Re-enter a new pin.

Use the following tips when creating a PIN:

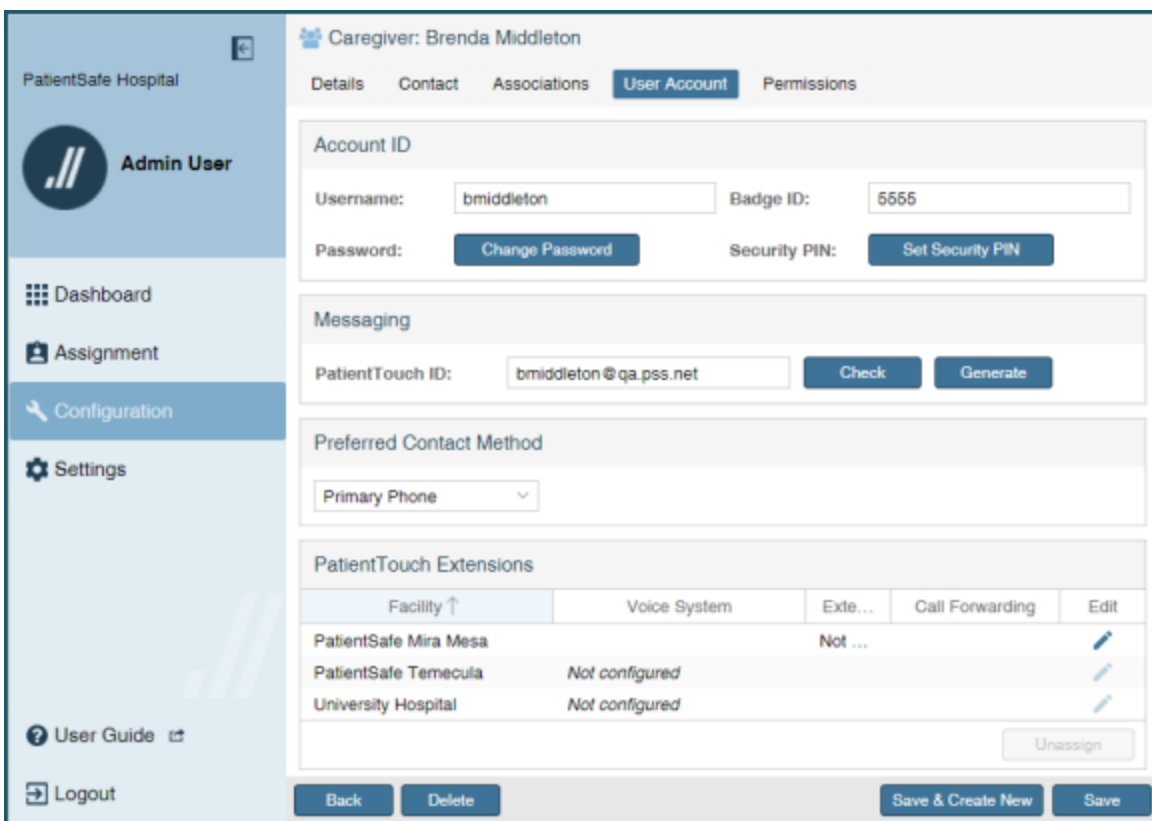
- 1234 or 4321 or 8765 will not be accepted
- No repeated digits

- You will not be able to save your pin if it has been used by another caregiver.

Click **Done** when you are finished.




Click **Done** when you are finished.

4. Use the information below to set the PatientTouch ID.
 - Click **Generate**. The application creates a PatientTouch messaging identifier (used for text messaging).
 - You can also manually enter a PatientTouch ID and click **Check** to see if there are any duplicates.
5. Click the **Preferred Contact Method** drop down menu to select the preferred method of communication for this caregiver. The preferred contact method must be entered in the Contact tab (primary phone, email, etc.)



The screenshot shows the 'User Account' configuration page for a caregiver named Brenda Middleton. The page is divided into several sections:

- Account ID:** Includes fields for Username (bmiddleton), Badge ID (5555), Password (with a 'Change Password' button), and Security PIN (with a 'Set Security PIN' button).
- Messaging:** Includes a PatientTouch ID field (bmiddleton@qa.pss.net) with 'Check' and 'Generate' buttons.
- Preferred Contact Method:** A dropdown menu currently set to 'Primary Phone'.
- PatientTouch Extensions:** A table with columns for Facility, Voice System, Extension, Call Forwarding, and Edit.

Facility ↑	Voice System	Ext...	Call Forwarding	Edit
PatientSafe Mira Mesa		Not ...		
PatientSafe Temecula	Not configured			
University Hospital	Not configured			

At the bottom of the page are buttons for 'Back', 'Delete', 'Save & Create New', and 'Save'.

6. Use the table below to assign PatientTouch Extensions.

Note This setting only pertains to those users of PatientTouch Communications-Android/iOS client or for those who have installed the Clinical Communications Module.

Note Users can only have one extension per facility and one extension per Voice Setting.

- 1 From the User Account tab, click the **Edit** icon next to the facility for which you want to assign an extension

From the Assign PatientTouch Extensions screen:

- 2 Click **Off** to turn off call forwarding.

- 3 Click **Forwarding #** if you want your calls to be forwarded to another extension. Enter the Call Forwarding #.
- 4 Select the **Extension Name** (Internal Range, External Range, Blue Range, etc.) that was set up in Settings>Voice Systems.
- 5 Click **Find Next Available** or **Find Next Available DID**. The extension automatically displays in the PatientTouch Extension field.
- 6 Click **Allow Voicemail** (Indicator) to enable the device to connect to a voice mail system, i.e. Cisco Unity.
- 7 **Voicemail:** Click to have your calls forwarded to your voicemail.
- 8 Click **Done** when you are finished.

The screenshot shows the 'Configure PatientTouch Extension' window. The interface includes the following elements:

- Facility:** PatientSafe Mira Mesa
- Voice System:** PSS CUCM
- Call Forwarding:** Radio buttons for Off, Forwarding # (selected), and Voicemail.
- Call Forwarding #:** Text field containing 858-746-3100.
- PatientTouch Extension:** Text field containing 6001.
- Allow Voicemail:** Checked checkbox.
- Voicemail Dial #:** Text field containing 5630.
- Voicemail Forward #:** Text field containing 5630.
- Available PatientTouch Extensions:** A table with columns: Name, Start, End, DID, External Access #.
- Find Next Available / Find Next Available DID:** Two buttons to the right of the table.
- Extension Availability Table:** A table with columns: Extension, Availability.
- Buttons:** Cancel, Done, Back, Delete, Save & Create New, Save.

Numbered callouts in the image indicate the following actions:


- 2:** Points to the 'Forwarding #' radio button.
- 3:** Points to the 'Call Forwarding #' text field.
- 4:** Points to the 'Blue Range-C...' row in the 'Available PatientTouch Extensions' table.
- 5:** Points to the 'Find Next Available' button.
- 6:** Points to the 'Allow Voicemail' checkbox.
- 7:** Points to the 'Voicemail' radio button.
- 8:** Points to the 'Done' button.

Name	Start ↑	End	DID	External Access #
Internal Range	1000	1002	N	858-746-3100
External Acces...	4611	4660	Y	8587460000
Blue Range-C...	6000	6012	Y	858-722-1XXX

Extension	Availability
6000	ac4
6001	Available
6002	n2
6003	zc3
6004	n3
6005	n4
6006	n1
6007	2-South: Charge Nurse
6008	ac1
6009	ac2
6010	ac3
6011	3-North: Ariel Charg...

The information displays in the User Account tab.

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Caregiver: Brenda Middleton

Details Contact Associations **User Account** Permissions

Account ID

Username: Badge ID:

Password: Security PIN:

Messaging

PatientTouch ID:

Preferred Contact Method

PatientTouch Extensions

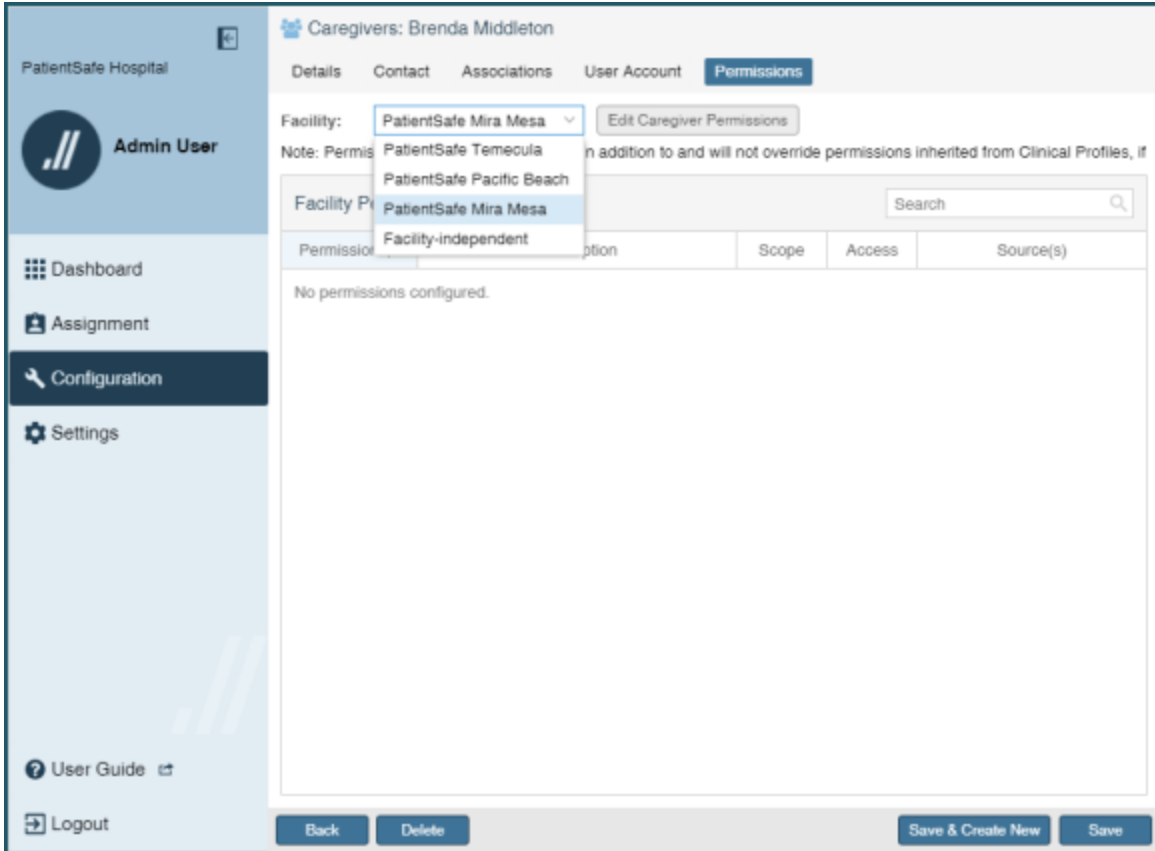
Facility ↑	Voice System	Ext...	Call Forwarding	Edit
PatientSafe Mira Mesa	doc server freeswitch	1000	Not enabled	✎
PatientSafe Temecula	Not configured			✎
University Hospital	Not configured			✎

Permissions

If you have the necessary privileges, you may edit Caregiver permissions. Otherwise, you will only be able to view them.

The permissions can be modified here to give additional permissions outside of what is set in the Clinical Profile.

1. Ensure you have the correct facility selected. Or, you may select "Facility Independent."



2. Click **Edit Caregiver Permissions**.

The screenshot shows the 'Permissions' tab for a caregiver named Brenda Middleton. The facility is set to 'PatientSafe Mira Mesa'. A red box highlights the 'Edit Caregiver Permissions' button. The 'Facility Permissions' table is currently empty.

Facility: PatientSafe Mira Mesa **Edit Caregiver Permissions**

Note: Permissions configured here will be in addition to and will not override permissions inherited from Clinical Profiles, if

Permission ↑	Description	Scope	Access	Source(s)
--------------	-------------	-------	--------	-----------

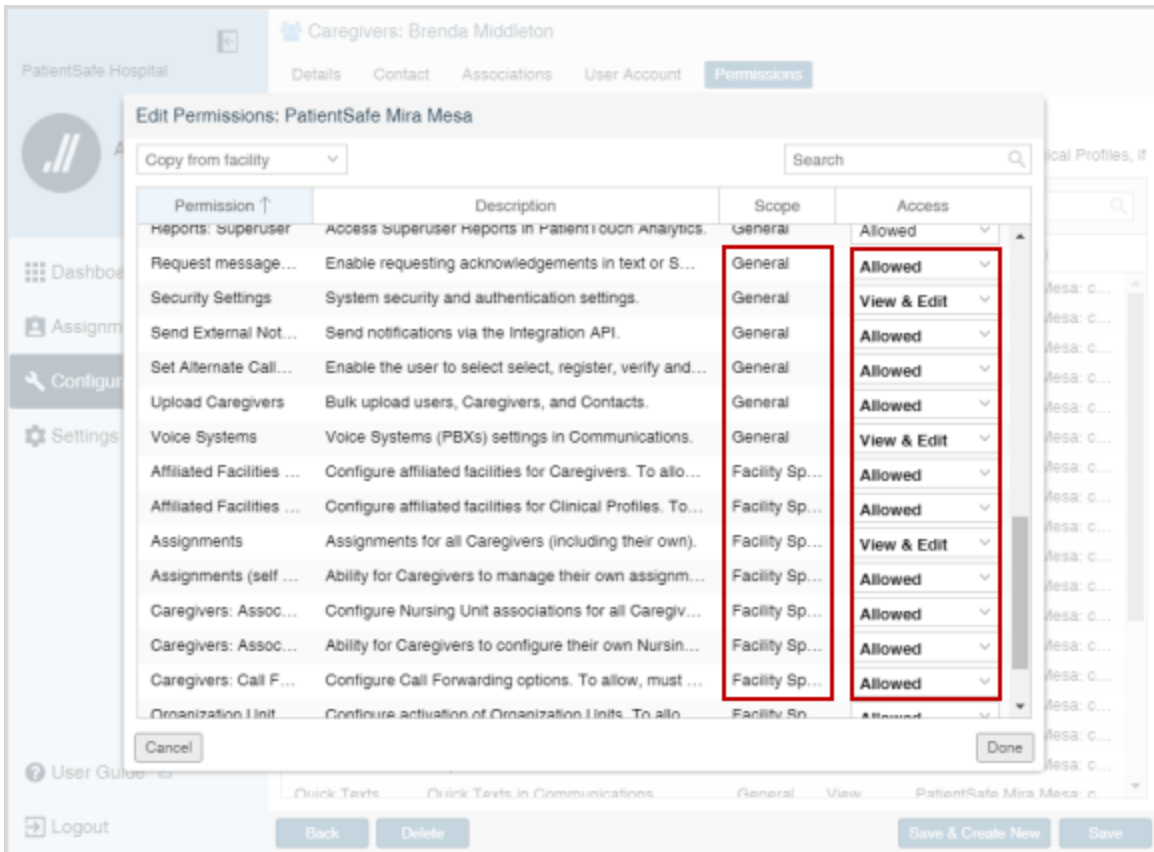
Buttons: Back, Delete, Save & Create New, Save

3. You may copy permissions from another facility.
4. Or, search for specific permissions using the Search field.

The screenshot shows the 'Edit Permissions: PatientSafe Mira Mesa' dialog box. At the top, there is a 'Copy from facility' dropdown menu and a search bar. Below these is a table with the following columns: Description, Scope, and Access. The table lists various permissions such as 'PatientSafe Temecula', 'PatientSafe Pacific Beach', 'Facility-independent', 'Access Integration...', 'Access Messagin...', 'Access PatientTo...', 'Affiliated Facilities ...', 'Caregivers', 'Caregivers: Patien...', 'Caregivers: User ...', 'Client Certificates', 'Clinical Attributes', 'Contact Directory', 'Device Authorization', 'Device List', and 'Manage System'. Each row has a 'Scope' of 'General' and an 'Access' dropdown menu currently set to 'none'. The dialog also includes 'Cancel' and 'Done' buttons at the bottom.

Description	Scope	Access
PatientSafe Temecula	General	none
PatientSafe Pacific Beach	General	none
Facility-independent	General	none
Access Integration...	General	none
Access Messagin...	General	none
Access PatientTo...	General	none
Affiliated Facilities ...	General	none
Caregivers	General	none
Caregivers: Patien...	General	none
Caregivers: User ...	General	none
Client Certificates	General	none
Clinical Attributes	General	none
Contact Directory	General	none
Device Authorization	General	none
Device List	General	none
Manage System	General	none

5. If you want to manually select permissions, click the **Access** drop down menu for each permission and set to (View/View & Edit or Allowed)
6. Note the **General** and **Facility Specific** permissions. General permissions apply to **all** facilities. Facility Specific permissions only apply to the selected facility.



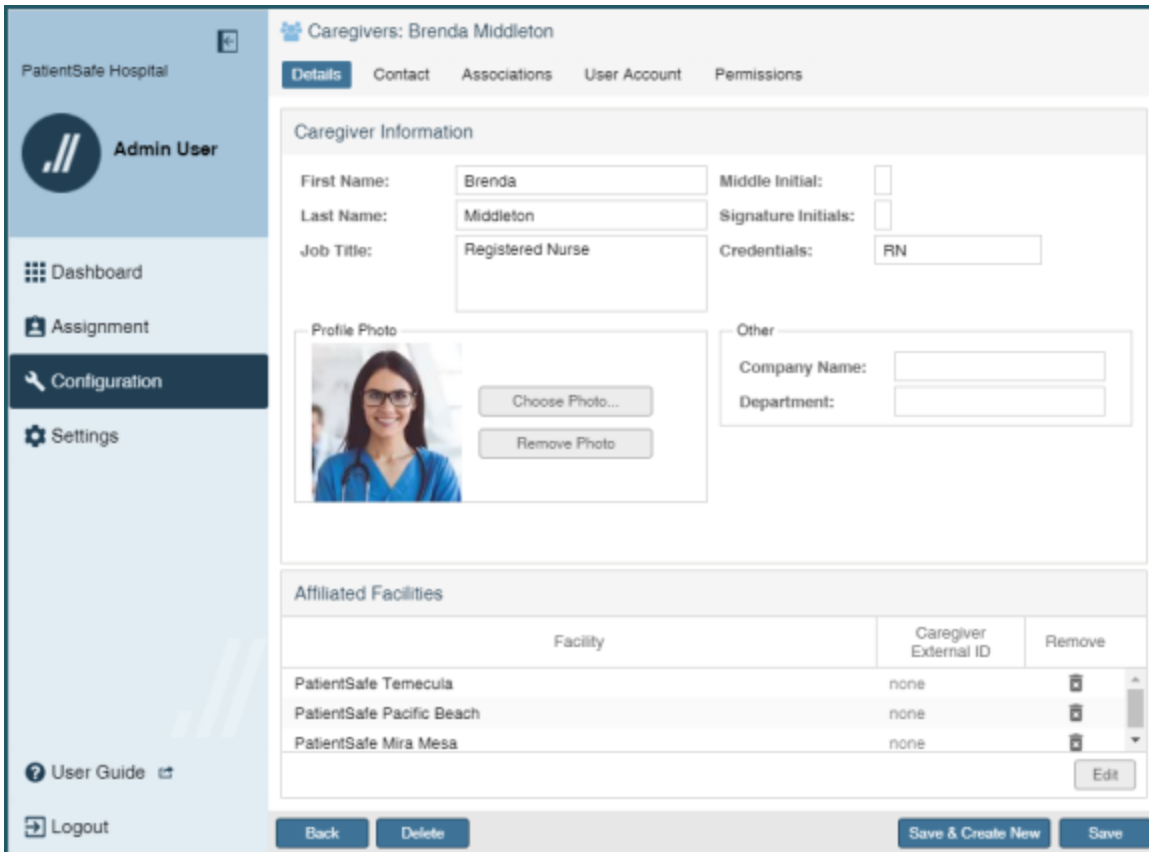
The screenshot shows the 'Edit Permissions: PatientSafe Mira Mesa' dialog box. The table below represents the data shown in the dialog:

Permission ↑	Description	Scope	Access
Reports: Superuser	Access Superuser Reports in Patient Touch Analytics.	General	Allowed
Request message...	Enable requesting acknowledgements in text or S...	General	Allowed
Security Settings	System security and authentication settings.	General	View & Edit
Send External Not...	Send notifications via the Integration API.	General	Allowed
Set Alternate Call...	Enable the user to select select, register, verify and...	General	Allowed
Upload Caregivers	Bulk upload users, Caregivers, and Contacts.	General	Allowed
Voice Systems	Voice Systems (PBXs) settings in Communications.	General	View & Edit
Affiliated Facilities ...	Configure affiliated facilities for Caregivers. To allo...	Facility Sp...	Allowed
Affiliated Facilities ...	Configure affiliated facilities for Clinical Profiles. To...	Facility Sp...	Allowed
Assignments	Assignments for all Caregivers (including their own).	Facility Sp...	View & Edit
Assignments (self ...	Ability for Caregivers to manage their own assignm...	Facility Sp...	Allowed
Caregivers: Assoc...	Configure Nursing Unit associations for all Caregiv...	Facility Sp...	Allowed
Caregivers: Assoc...	Ability for Caregivers to configure their own Nursin...	Facility Sp...	Allowed
Caregivers: Call F...	Configure Call Forwarding options. To allow, must ...	Facility Sp...	Allowed
Organization Unit	Configure activation of Organization Units. To allo...	Facility Sp...	Allowed

7. Click **Done** when you are finished.


Saving Newly Created Caregivers

1. If you have more Caregivers to create, click **Save & Create New** to save your current Caregivers and remain in the Create New window. This allows you to create multiple Caregivers without having to return to the main menu first.
2. If you have finished creating new Care Roles, click **Save**.
3. Click the **Back** button at any time to return to the previous screen. If you have entered any information, you will receive a message asking if you want to save.



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Caregivers: Brenda Middleton
 Details | Contact | Associations | User Account | Permissions

Caregiver Information
 First Name: Middle Initial:
 Last Name: Signature Initials:
 Job Title: Credentials:
 Profile Photo: 
 Other: Company Name: Department:

Affiliated Facilities

Facility	Caregiver External ID	Remove
PatientSafe Temecula	none	<input type="button" value="Remove"/>
PatientSafe Pacific Beach	none	<input type="button" value="Remove"/>
PatientSafe Mira Mesa	none	<input type="button" value="Remove"/>

Inactivating a Caregiver

After a caregiver has been created and saved, the profile may be deactivated. For example, if a nurse goes on maternity leave, the facility may inactivate her profile until she returns. When she returns, the profile may be activated again.

When a caregiver is in an inactive state, their phone extension also becomes deactivated and may be assigned to another user.

When the caregiver returns to an active state, they may need to be assigned a new extension.

To inactivate a user:

1. Click **Inactivate**.

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Caregiver: Brenda Middleton

Details Contact Associations User Account Permissions

Caregiver Information

First Name: Brenda Middle Initial:

Last Name: Middleton Signature Initials:

Job Title: Registered Nurse Credentials: RN

Profile Photo

Choose Photo... Remove Photo

Other

Company Name:

Department:

Affiliated Facilities

Facility ↑	Caregiver External ID	Remove
PatientSafe Mira Mesa	none	<input type="checkbox"/>

Edit

Back Delete **Inactivate** Save & Create New Save

2. Click **Yes** on the confirmation screen.

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Caregiver: Brenda Middleton

Details Contact Associations User Account Permissions

Caregiver Information

First Name: Brenda Middle Initial:

Last Name: Middleton Signature Initials:

Job Title: Registered Nurse Credentials: RN

Profile Photo

Remove Photo

Other

Company Name:

Department:

Affiliated Facilities

Facility ↑	Caregiver External ID	Remove
PatientSafe Mira Mesa	none	<input type="checkbox"/>

Edit

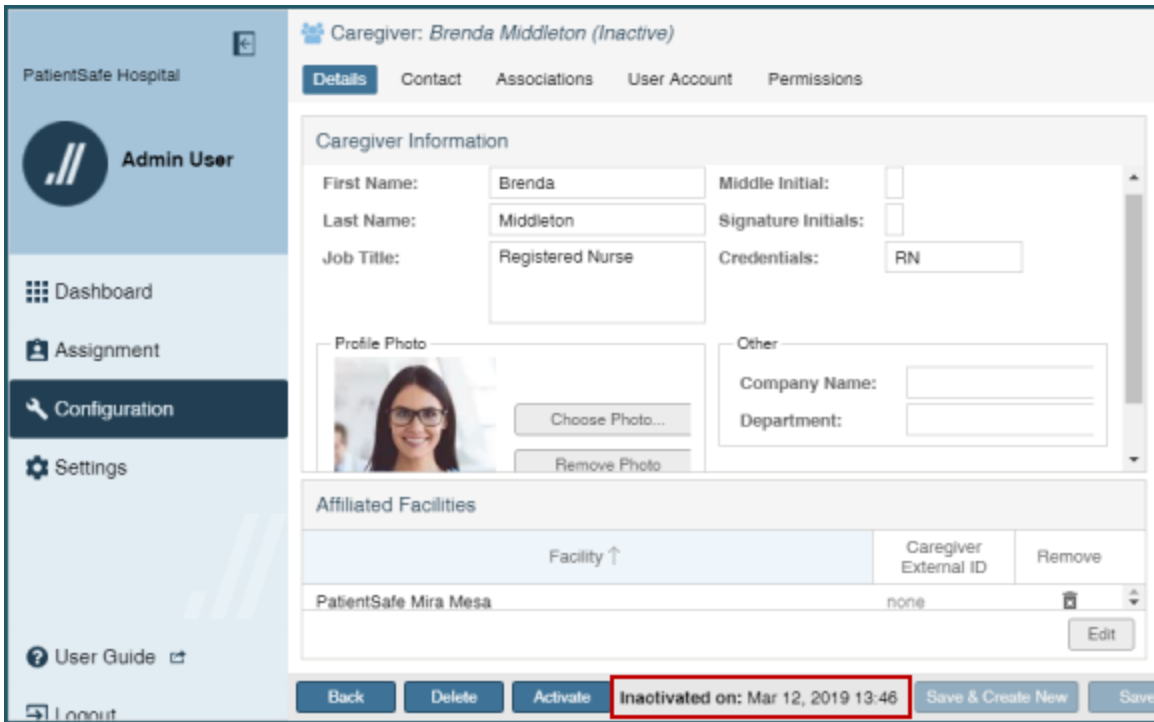
Back Delete Inactivate Save & Create New Save

Confirm

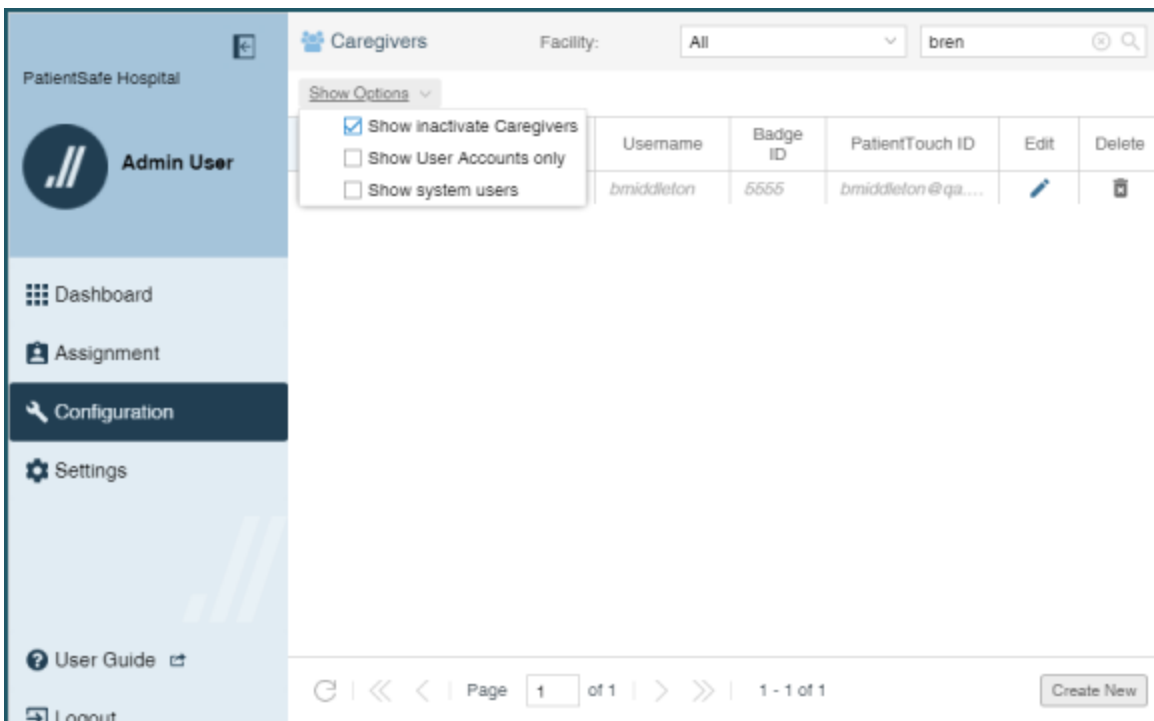
Are you sure you want to inactivate caregiver: Brenda Middleton? Assignments will be removed.

No Yes

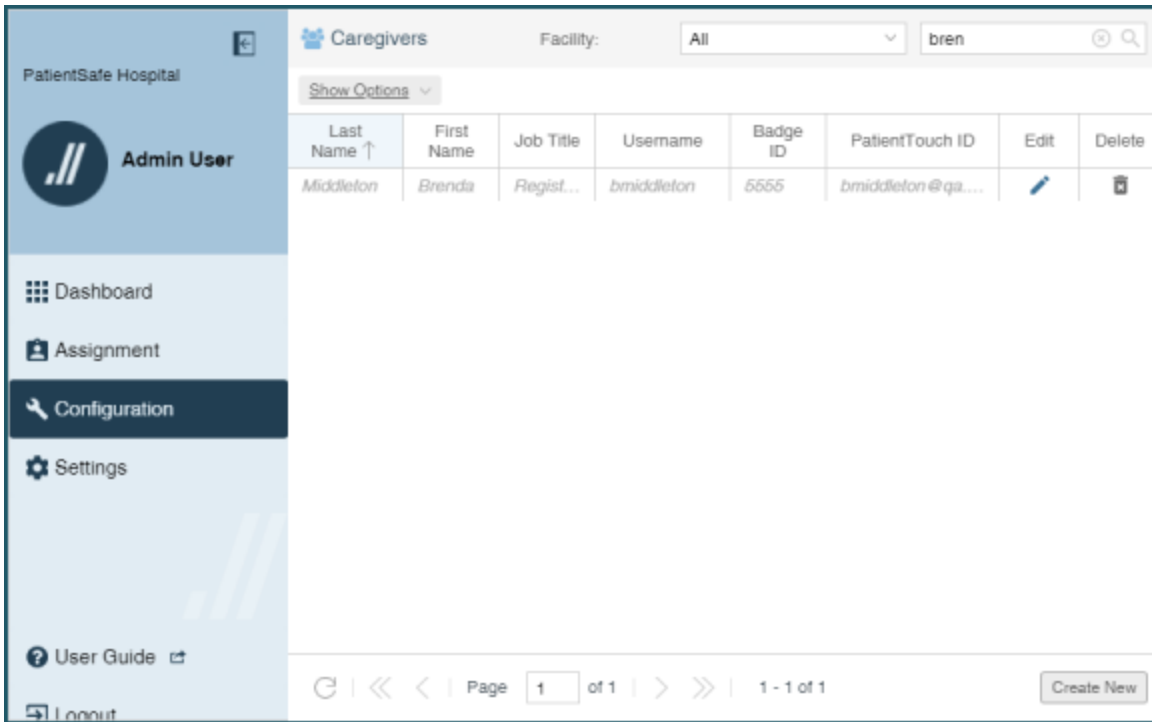
3. The caregiver profile displays the date and time of inactivation.



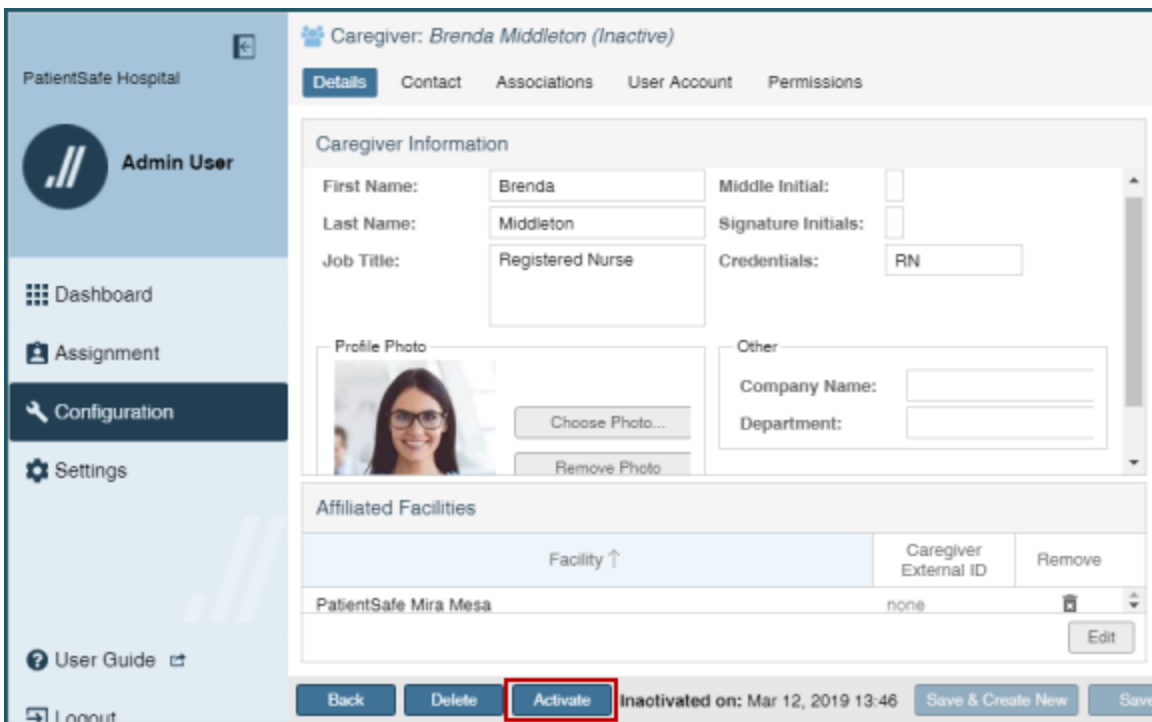
- Inactivated caregivers display in gray italics when "Show inactive Caregivers" is selected from the **Show Options** drop down menu.



- Nurse Brenda Middleton displays as inactive, in gray, italic font.



6. Double-click the caregiver profile to re-activate her account.
7. Click **Activate**.



8. The profile is active again.

Caregiver: Brenda Middleton

Details | Contact | Associations | User Account | Permissions

Caregiver Information

First Name: Middle Initial:

Last Name: Signature Initials:

Job Title: Credentials:

Profile Photo:

Other

Company Name:

Department:

Affiliated Facilities

Facility ↑	Caregiver External ID	Remove
PatientSafe Mira Mesa	none	<input type="button" value="Edit"/>

Editing Caregiver

1. To edit a Caregiver, simply click the **Edit** icon to the right of the desired Caregiver.

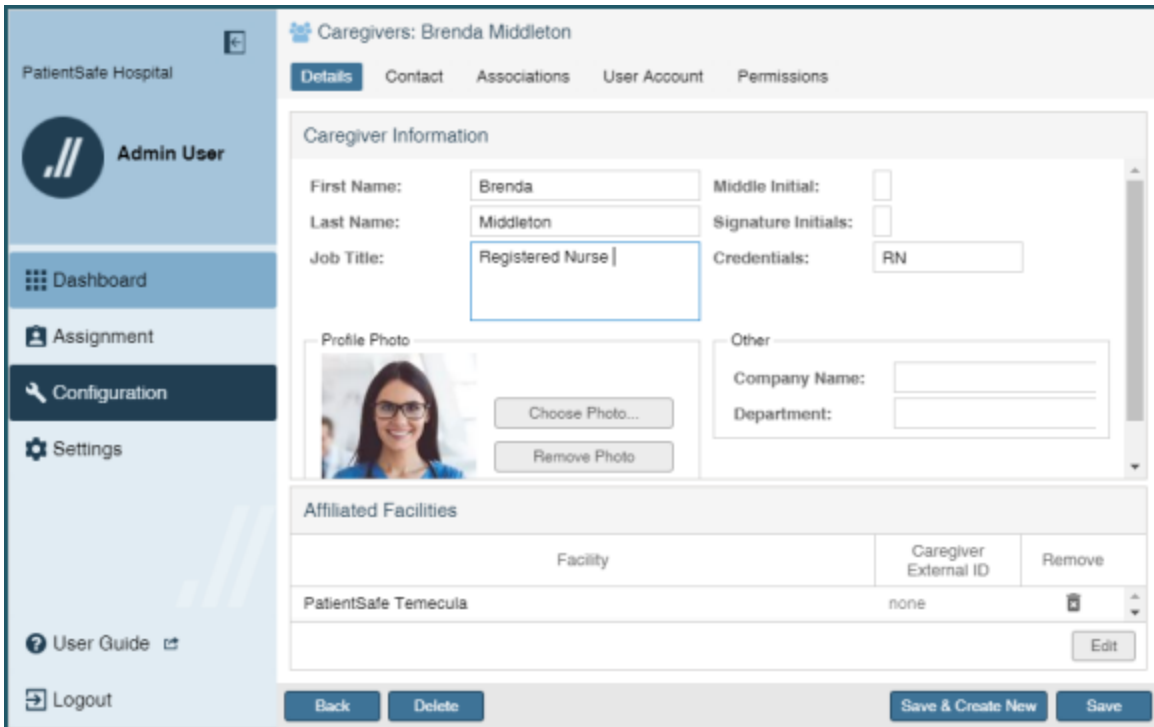
Caregivers Facility: All Search

Show Options

Last Name ↑	First Name	Job Title	Username	Badge ID	PatientTouch ID	Edit	Delete
Able	Paul	Surgeon	pable	1123	pable@qa.pss.net	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Abney	Steve	Surgeon	sabney	1132	sabney@qa.pss...	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Abundy	Malcolm	Phlebo...	mabundy	1116	mabundy@qa.ps...	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Addams	Jane	LSW	jaddams	jaddams		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Adirondack	Mitch	IT Dire...	madirondack	1117	madirondack@q...	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Affernuff	Robert	Physic...	raffernuth	1121	raffernuth@qa.p...	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Affiliated ...	Zohreh		zaf	zaf	zaf@qa.pss.net	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Afirth	Joe	Janitor	jafirth	1120	jafirth@qa.pss.net	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Airbus	Kelly	Respir...	kairbus	1122	kairbus@qa.pss...	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Alexande...	Joseph	Urology	aj1	aj1	aj1@qa.pss.net	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Amber	Karen	Unit S...	kadonerson	1119	kadonerson@qa...	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Anderson	Becky	Regist...	banderson	1112	banderson@qa.p...	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Anderson	Abby	Regist...	aanderson	aa	aanderson@qa.p...	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
anne	barbara	nurse	barbarab	barbarab	barbarab@qa.ps...	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Applebee	John	Anesth...	japplebee	1111	japplebee@qa.p...	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Arundell	Jay	Physic...	jarundell	1118	jarundell@qa.ps...	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

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2. Or, double-click the individual Caregiver.
3. Edit information in any of the desired tabs.



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Caregivers: Brenda Middleton

Details Contact Associations User Account Permissions

Caregiver Information

First Name: Brenda Middle Initial:

Last Name: Middleton Signature Initials:

Job Title: Registered Nurse Credentials: RN

Profile Photo

Other

Company Name:

Department:

Affiliated Facilities

Facility	Caregiver External ID	Remove
PatientSafe Temecula	none	<input type="button" value="Remove"/>

4. Click **Save** when you are done.

Deleting Caregiver

Users with the appropriate privileges can delete a Caregiver by one of two methods:

1. Click the **Delete** icon to the right of the selected Caregiver.

Caregivers Facility: All Search

Show Options

Last Name ↑	First Name	Job Title	Username	Badge ID	PatientTouch ID	Edit	Delete
Able	Paul	Surgeon	pable	1123	pable@qa.pss.net		
Abney	Steve	Surgeon	sabney	1132	sabney@qa.pss...		
Abundy	Malcolm	Phlebo...	mabundy	1116	mabundy@qa.ps...		
Addams	Jane	LSW	jaddams	jaddams			
Adirondack	Mitch	IT Dire...	madirondack	1117	madirondack@q...		
Affernuff	Robert	Physic...	raffernuth	1121	raffernuth@qa.p...		
Affiliated ...	Zohreh		zaf	zaf	zaf@qa.pss.net		
Afirth	Joe	Janitor	jafirth	1120	jafirth@qa.pss.net		
Airbus	Kelly	Respir...	kairbus	1122	kairbus@qa.pss...		
Alexande...	Joseph	Urology	aj1	aj1	aj1@qa.pss.net		
Amber	Karen	Unit S...	kadonerson	1119	kadonerson@qa...		
Anderson	Becky	Regist...	banderson	1112	banderson@qa.p...		
Anderson	Abby	Regist...	aanderson	aa	aanderson@qa.p...		
anne	barbara	nurse	barbarab	barbarab	barbarab@qa.ps...		
Applebee	John	Anesth...	japplebee	1111	japplebee@qa.p...		
Arundell	Jay	Physic...	jarundell	1118	jarundell@qa.ps...		

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2. Or, from the Edit screen, click **Delete** from the bottom left hand corner.

Caregivers: Brenda Middleton

Details Contact Associations User Account Permissions

Caregiver Information

First Name: Brenda Middle Initial:

Last Name: Middleton Signature Initials:

Job Title: Registered Nurse | Credentials: RN

Profile Photo

Other Company Name: Department:

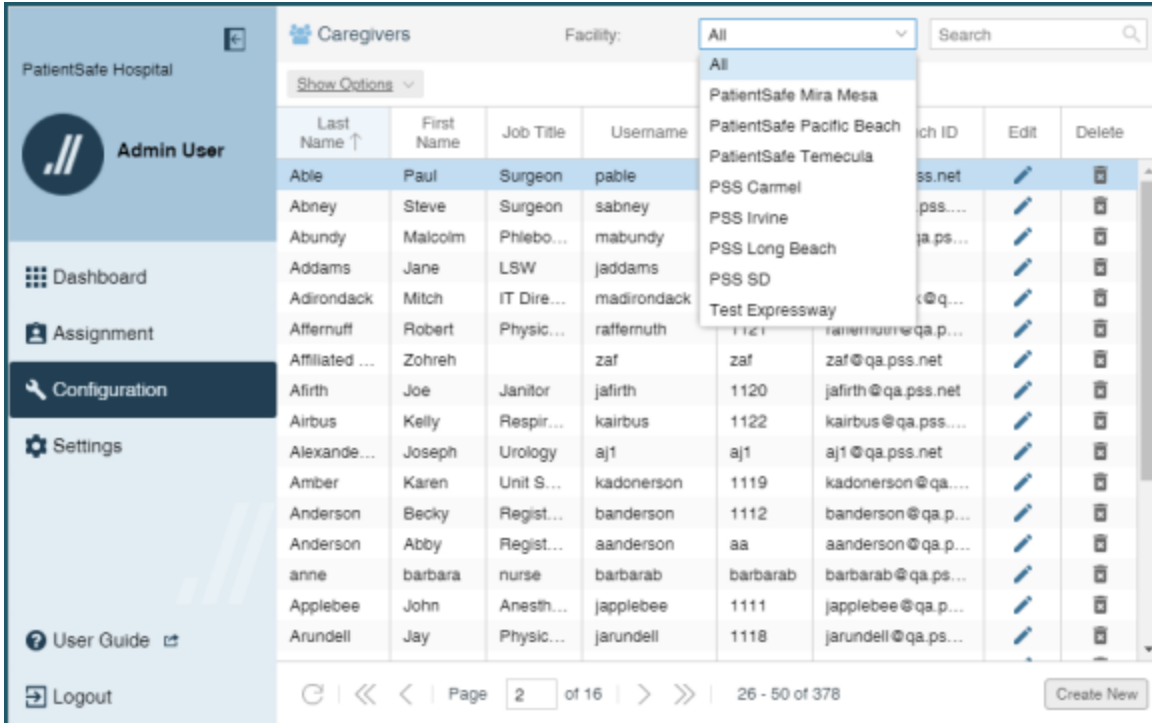
Affiliated Facilities

Facility	Caregiver External ID	Remove
PatientSafe Temecula	none	

Searching for Existing Caregivers

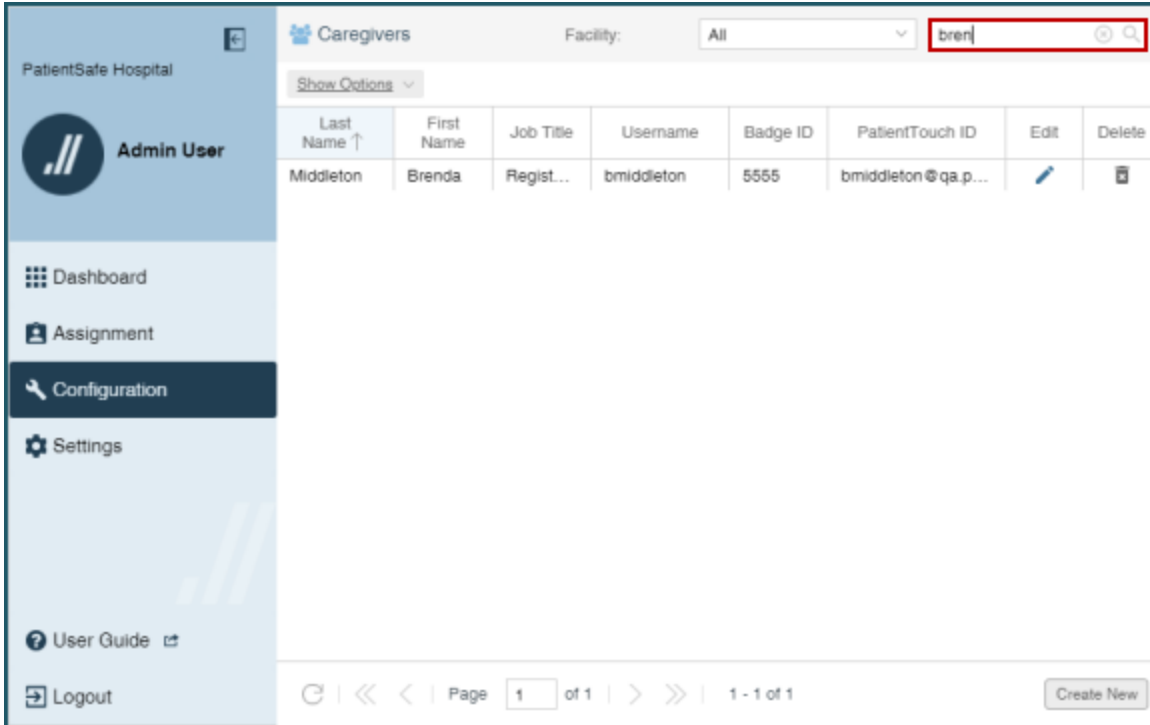
Search Caregivers using any of the following methods.

1. Search within a specific facility.

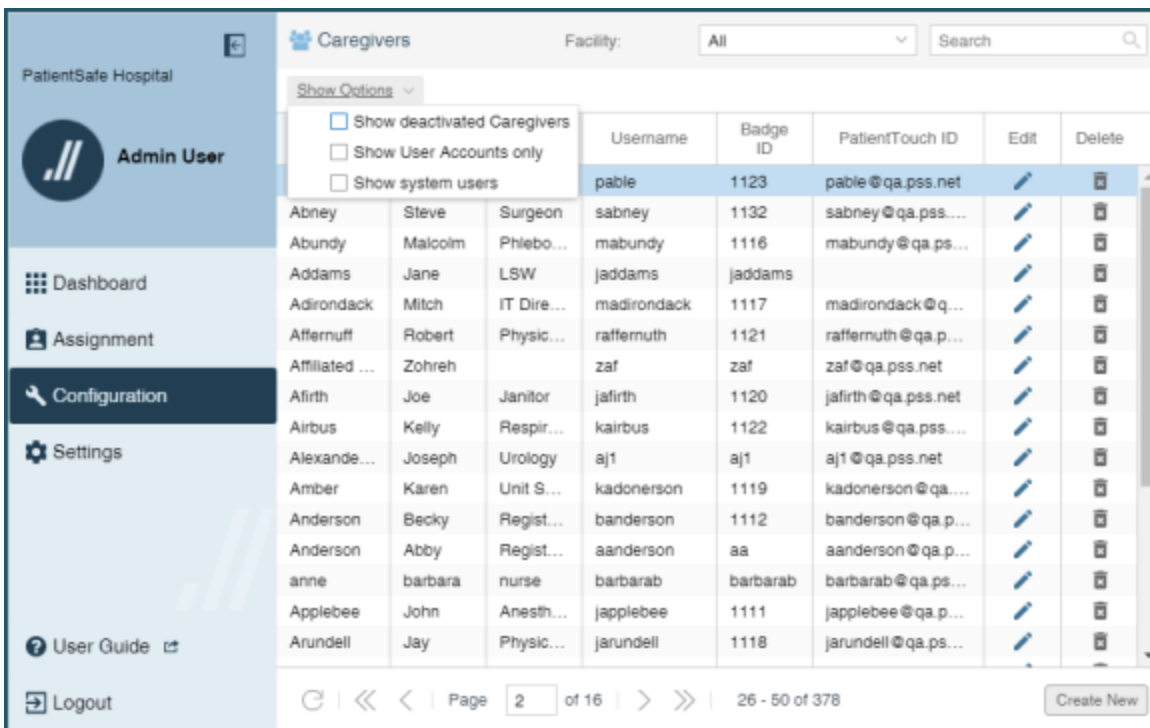


Last Name ↑	First Name	Job Title	Username	Facility	Badge ID	Edit	Delete
Able	Paul	Surgeon	pable				
Abney	Steve	Surgeon	sabney				
Abundy	Malcolm	Phlebo...	mabundy				
Addams	Jane	LSW	jaddams				
Adirondack	Mitch	IT Dire...	madirondack				
Affernuff	Robert	Physic...	raffernuth				
Affiliated ...	Zohreh		zaf				
Afirth	Joe	Janitor	jafirth	1120			
Airbus	Kelly	Respir...	kairbus	1122			
Alexande...	Joseph	Urology	aj1	aj1			
Amber	Karen	Unit S...	kadonerson	1119			
Anderson	Becky	Regist...	banderson	1112			
Anderson	Abby	Regist...	aanderson	aa			
anne	barbara	nurse	barbarab	barbarab			
Applebee	John	Anesth...	japplebee	1111			
Arundell	Jay	Physic...	jarundell	1118			

2. Search by entering your key words into the Search field. Search using last name, first name, job title, username, badge ID, or any of the fields on this screen.



3. Search by selecting the drop down menu under **Show Options** and click one or more of the items available.

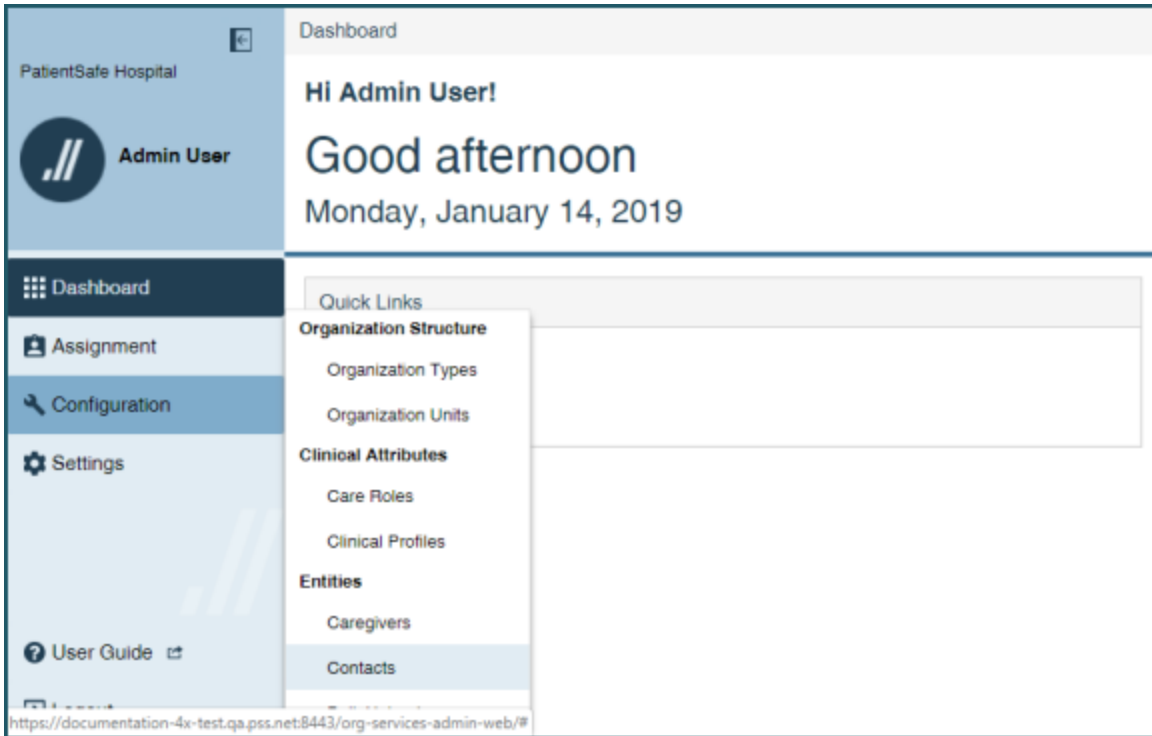


Contacts

All users have the ability to select and view existing contacts. And if you have the necessary privileges configured in your User Account, you may create new contacts and edit them.

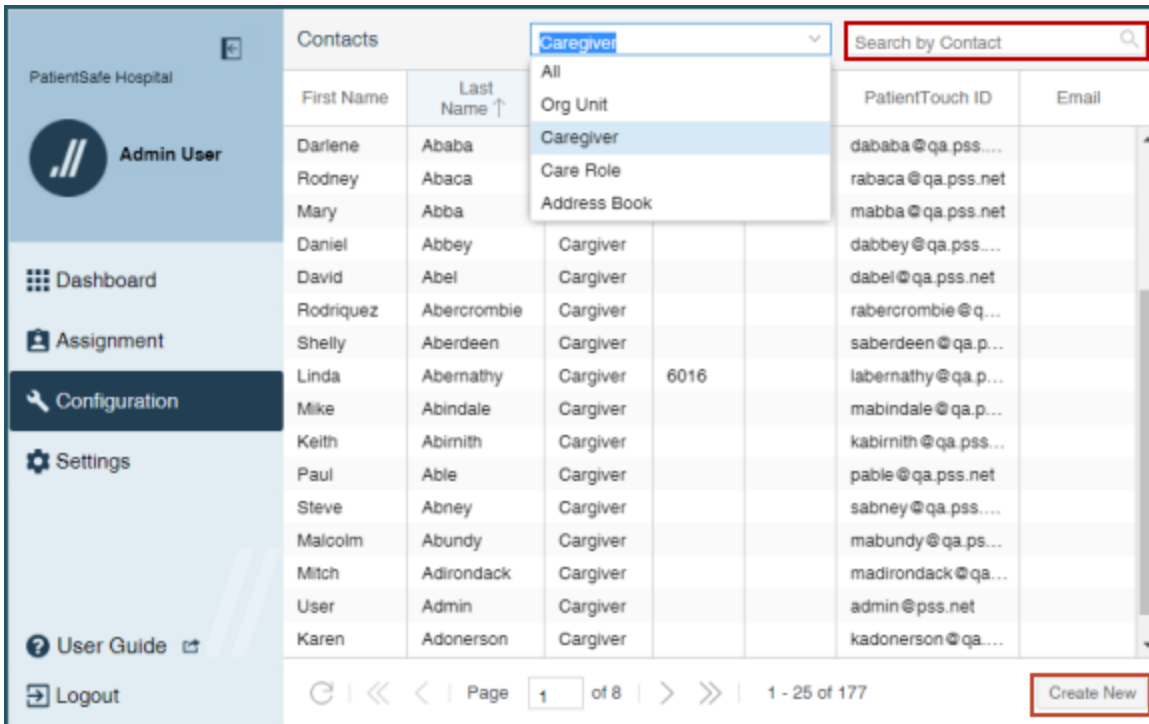
View Existing Contacts

1. From the Dashboard, click Configuration>Contacts.



The list of contacts displays.

2. Filter contacts by clicking the drop down menu on the top of the screen and select All, Org Unit, Caregiver, Care Role or Address Book.
3. Search contacts by entering your keywords in the Search field: First Name, Last Name, PatientTouch Extension, Primary Phone, PatientTouch ID, or Email.
4. Create a new contact by clicking **Create New**.



The screenshot shows the 'Contacts' page in the PatientTouch Enterprise Manager. On the left is a navigation sidebar with options: Admin User, Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The main content area displays a table of contacts. A dropdown menu is open over the 'Caregiver' column, showing options: All, Org Unit, Caregiver (highlighted), Care Role, and Address Book. A search box labeled 'Search by Contact' is highlighted in the top right. The table has columns for First Name, Last Name, Caregiver, and Email. The bottom of the page shows pagination: Page 1 of 8, 1 - 25 of 177, and a 'Create New' button.

First Name	Last Name ↑	Caregiver	PatientTouch ID	Email
Darlene	Ababa		dababa@qa.pss...	
Rodney	Abaca		rabaca@qa.pss.net	
Mary	Abba		mabba@qa.pss.net	
Daniel	Abbey	Caregiver	dabbey@qa.pss...	
David	Abel	Caregiver	dabel@qa.pss.net	
Rodriguez	Abercrombie	Caregiver	rabercrombie@q...	
Shelly	Aberdeen	Caregiver	saberdeen@qa.p...	
Linda	Abernathy	Caregiver 6016	labernathy@qa.p...	
Mike	Abindale	Caregiver	mabindale@qa.p...	
Keith	Abirnith	Caregiver	kabirnith@qa.pss...	
Paul	Able	Caregiver	pable@qa.pss.net	
Steve	Abney	Caregiver	sabney@qa.pss....	
Malcolm	Abundy	Caregiver	mabundy@qa.ps...	
Mitch	Adirondack	Caregiver	madirondack@qa...	
User	Admin	Caregiver	admin@pss.net	
Karen	Adonerson	Caregiver	kadonerson@qa...	

5. Enter contact information including:

- First/Last Name
- Signature Initials
- Job Title
- Credentials
- Company Name (optional)
- Department (optional)

6. Enter desired phone numbers, email addresses, postal addresses, or messaging JIDs.

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Contact

Contact Information

First Name: Middle Initial:

Last Name: Signature Initials:

Job Title: Credentials:

Company Name:

Department:

Phone Numbers

Type	Number	Facility	Delete
Primary Phone	858-746-3100		✕

Email Addresses

Type	Address	Delete
Hospital	ncena@pss.hospital.net	✕

7. Click **Save** when you are finished.

On-Call Integrations-AMiON

On call integrations are created to help organize provider schedules so that individual caregivers can see who is on call. They can see their own personal on call schedules, and they can see who is coming on-call the next shift.

Schedules are created for individual departments within a hospital. A master schedule is created in AMiON where staff can view personal schedules months ahead of time. If you DO NOT already have an AMiON master schedule created, you must do so prior to integrating on call scheduling with your Enterprise Manager.

When creating the master schedule, PatientSafe Solutions requires you to include the active directory account in the AMiON contact entry.

Once the master schedule is created, hospitals are given an AMiON account, which they can use to configure schedules in Enterprise Manager.

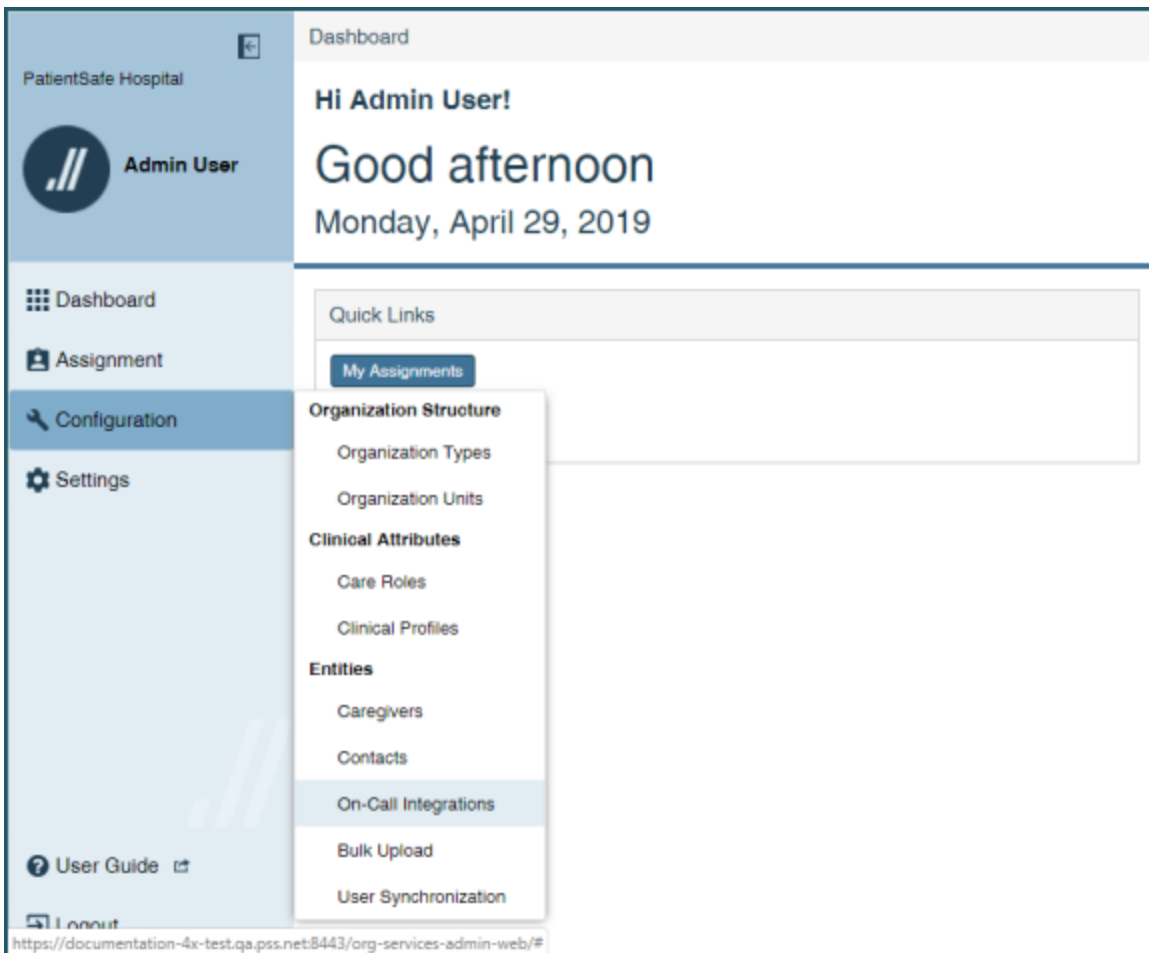
Please refer to AMiON's documentation for the AMiON setup on amion.com.

[Click here to review a document on configuring AMiON to PatientTouch.](#)

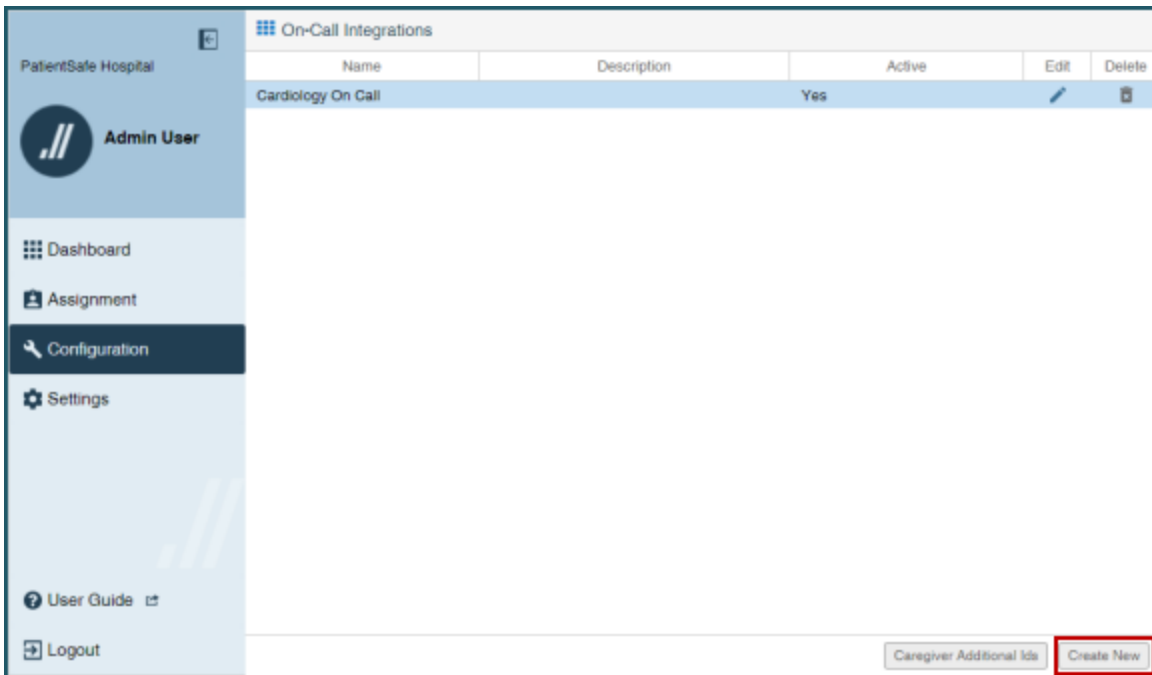
Configure On Call Schedules

To configure on call schedules, follow the instructions below.

1. Click **Configuration>On-Call Integrations**.



2. Click **Create New**.



3. Use the information below to complete the fields:

Name	The name is typically the hospital name or a large section of the hospital name. For example, PSS Hospital.
Description	Enter a description of the schedule.
AMiON Account Login	This is the same login as it is for the Amion.com login.
Default Facility	Select the default facility for the schedule.
Timezone:	Select the timezone.
Auto Update	Click the check box to have the schedule automatically updated every "X" minutes.
Check Every (Minutes)	Enter the number of minutes you want the system to be automatically updated.

On-Call Integration: Cardiology On Call

Settings Schedules

Basic Information

Name: Cardiology On Call

Description:

Settings

AMiON Account Login: pss

Default Facility: PatientSafe Mira Mesa

Timezone: America/Los_Angeles (GMT-7)

Auto Update:

Update Every (Minutes): 60

Status

Last Updated: 2019-05-01T12:17:34-07:00

No schedules configured. [Configure here...](#)

Back Update Assignments Save

4. Click **Schedules**.

All of the schedules for the facility display that are configured in the master AMiON Schedule.

5. Click the **Active** button to activate each schedule for the facility.
6. Click a schedule to view associated shifts, which display beneath, under Services.

On-Call Integration: Cardiology On Call

Settings Schedules

Schedules

AMION Schedule	Display Name	Last Updated	Active
Products	Products		<input type="checkbox"/>
Cardiology On Call	Cardiology On Call		<input checked="" type="checkbox"/>
Implementation	Implementation		<input type="checkbox"/>
Urology	Urology	2019-04-26T10:33:46.159-07:00	<input type="checkbox"/>
Pediatric	Pediatric		<input type="checkbox"/>
Pediatric On-Call Surgery	Pediatric On-Call Surgery		<input type="checkbox"/>
Radiology	Radiology		<input type="checkbox"/>
Anesthesia	Anesthesia		<input type="checkbox"/>

Edit

Services - Cardiology On Call

AMION Service	Display Name	Last Updated	Active
Cardiology AM	Cardiology AM		<input type="checkbox"/>
Cardiology PM	Cardiology PM		<input type="checkbox"/>
Cardiology Stat Tech	Cardiology Stat Tech		<input type="checkbox"/>
Cardiology Supervisor	Cardiology Supervisor		<input type="checkbox"/>
Cardiopulmonary Manager	Cardiopulmonary Manager		<input type="checkbox"/>

Edit

[Back](#)
[Update Assignments](#)
[Save](#)

PatientSafe Hospital
 Admin User
 Dashboard
 Assignment
 Configuration
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 Logout

- Click **Active** on each associated shift to activate the shift.
- Select a shift and click **Edit** or double-click the shift.

On-Call Integration: Cardiology On Call

Settings Schedules

Schedules

AMiON Schedule	Display Name	Last Updated	Active
Products	Products		<input type="checkbox"/>
Cardiology On Call	Cardiology On Call		<input checked="" type="checkbox"/>
Implementation	Implementation		<input type="checkbox"/>
Urology	Urology	2019-04-26T10:33:46.159-07:00	<input type="checkbox"/>
Pediatric	Pediatric		<input type="checkbox"/>
Pediatric On-Call Surgery	Pediatric On-Call Surgery		<input type="checkbox"/>
Radiology	Radiology		<input type="checkbox"/>
Anesthesia	Anesthesia		<input type="checkbox"/>

Edit

Services - Cardiology On Call

AMiON Service	Display Name	Last Updated	Active
Cardiology AM	Cardiology AM		<input checked="" type="checkbox"/>
Cardiology PM	Cardiology PM		<input checked="" type="checkbox"/>
Cardiology Stat Tech	Cardiology Stat Tech		<input checked="" type="checkbox"/>
Cardiology Supervisor	Cardiology Supervisor		<input type="checkbox"/>
Cardiopulmonary Manager	Cardiopulmonary Manager		<input type="checkbox"/>

Edit

Back Update Assignments Save

9. Use the information below to complete the fields:

- Display Name:** Defaults to display the AMiON Service shift name.
- AMiON ID:**
- Active:** Click to activate/deactivate a shift.
- House Pager:** Enter the house page number for the shift.
- House Phone:** Enter the house phone number for the shift.
- Link Caregivers By:** Click the drop down menu and select: Login Name or Additional ID. This is used to link AMiON users to PatientTouch Caregivers to prevent duplicates and provide more accurate, complete contact information.
- Notes:** Enter any additional information.

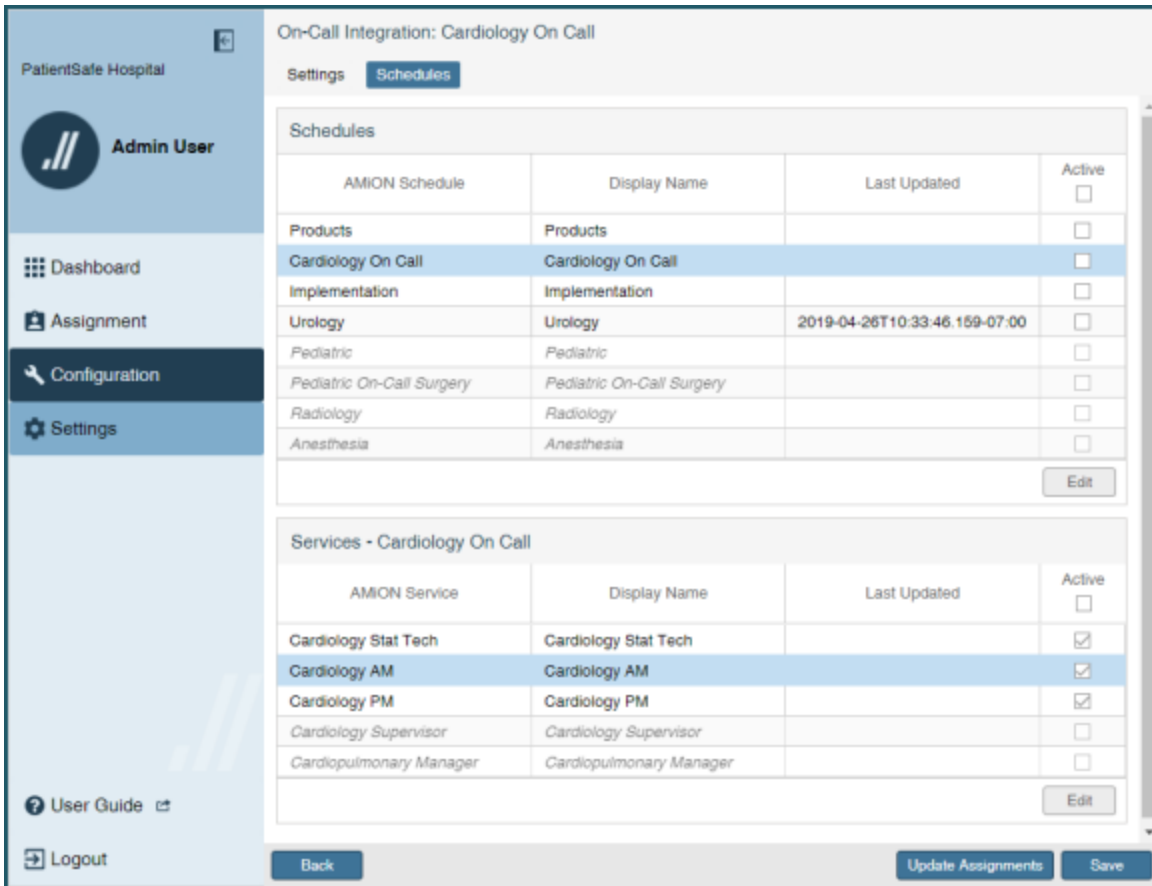
10. Click **Done**.

The screenshot displays the 'On-Call Integration: Cardiology On Call' settings page. A modal window titled 'Service - Cardiology On Call / Cardiology AM' is open, allowing for configuration of a specific service. The modal contains the following fields and options:

- Display Name:** Cardiology AM
- AMION Id:** 26
- Active:**
- House Pager:** (empty text field)
- House Phone:** (empty text field)
- Link Caregivers By:** A dropdown menu with 'Login Name' selected. The dropdown list shows:
 - None
 - Login Name
 - Additional Id
- Additional Id:** (empty text field)
- Notes:** (empty text area)

Buttons for 'Cancel' and 'Done' are located at the bottom of the modal. The background interface shows a 'Schedules' table with columns: AMION Schedule, Display Name, Last Updated, and Active. The table contains several rows, with the first row highlighted in blue. At the bottom of the page, there are buttons for 'Back', 'Update Assignments', and 'Save'.

11. Click **Save**, which saves your changes.



On-Call Integration: Cardiology On Call

Settings Schedules

Schedules

AMION Schedule	Display Name	Last Updated	Active
Products	Products		<input type="checkbox"/>
Cardiology On Call	Cardiology On Call		<input type="checkbox"/>
Implementation	Implementation		<input type="checkbox"/>
Urology	Urology	2019-04-26T10:33:46.159-07:00	<input type="checkbox"/>
Pediatric	Pediatric		<input type="checkbox"/>
Pediatric On-Call Surgery	Pediatric On-Call Surgery		<input type="checkbox"/>
Radiology	Radiology		<input type="checkbox"/>
Anesthesia	Anesthesia		<input type="checkbox"/>

Edit

Services - Cardiology On Call

AMION Service	Display Name	Last Updated	Active
Cardiology Stat Tech	Cardiology Stat Tech		<input checked="" type="checkbox"/>
Cardiology AM	Cardiology AM		<input checked="" type="checkbox"/>
Cardiology PM	Cardiology PM		<input checked="" type="checkbox"/>
Cardiology Supervisor	Cardiology Supervisor		<input type="checkbox"/>
Cardiopulmonary Manager	Cardiopulmonary Manager		<input type="checkbox"/>

Edit

Back Update Assignments Save

Update Assignments

Clicking the **Update Assignments** button is mostly used to quickly update new information to the database without waiting for the update period. It can be used to test that the schedule is uploading properly.

The **Log** window on the **Settings** tab displays warnings and other information when you click **Update Assignments**.

Caregiver Additional Ids

Caregiver Additional Ids link a user to an external system, such as Active Directory (AD).

To add an additional caregiver ID:

1. Click **Caregiver Additional Ids**.

On-Call Integrations

Name	Description	Active	Edit	Delete
Cardiology On Call		Yes		

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Caregiver Additional Ids

Create New

2. Click **Create New**.

Caregiver Additional Id Types

Name ↑	Code	Description	Edit	Delete
No entries				

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Create New

Use the information below to complete the fields.

Name: Enter the Name of the caregiver ID.

Description: Enter a description of the caregiver ID.

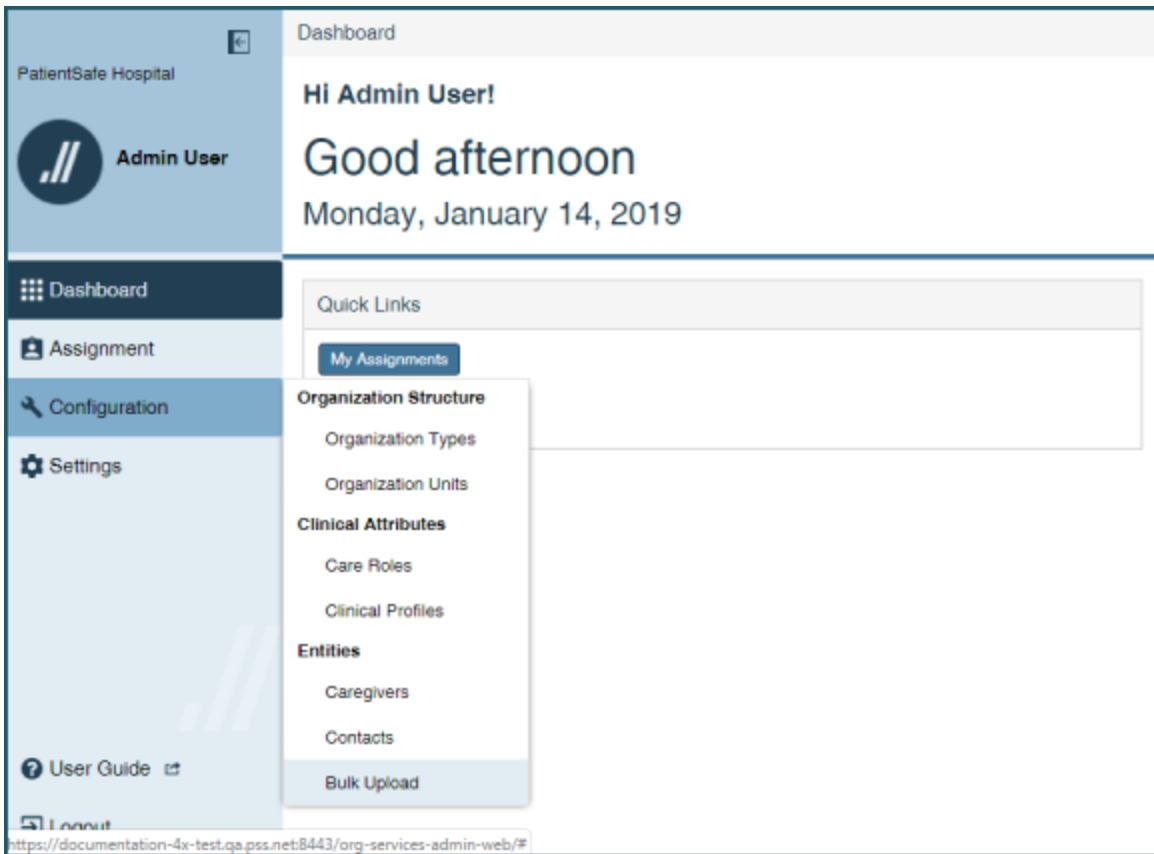
Code: Enter the designated code. The code is used to link caregivers to an external system when their ID is NOT the AD login name of the facility.

3. Click **Save**, which saves your changes.

The screenshot shows the 'Caregiver Additional Id Type' configuration page. On the left is a sidebar with the following items: 'PatientSafe Hospital' (with a user icon), 'Admin User' (with a profile icon), 'Dashboard' (with a grid icon), 'Assignment' (with a person icon), 'Configuration' (with a wrench icon and highlighted), 'Settings' (with a gear icon), 'User Guide' (with a question mark icon), and 'Logout' (with a door icon). The main content area is titled 'Caregiver Additional Id Type -' and contains a 'Basic Information' section with three input fields: 'Name:' (with a red error icon), 'Description:' (with a larger text area), and 'Code:' (with a red error icon). At the bottom of the main area are 'Back' and 'Save' buttons.

Bulk Upload

1. Bulk Upload is a tool used to import an Excel spreadsheet of users, caregivers, and contacts into the PatientTouch System. The Excel spreadsheet must be in .csv format.
2. It is typically used by the PatientSafe Solutions Technical Support Team for hospitals that don't use LDAP/AD integration.
3. To view Bulk Upload, you must have the necessary permissions. From the Dashboard, click Configuration>Bulk Upload.



4. The Bulk Upload screen displays.

PatientSafe Hospital

Admin User

- Dashboard
- Assignment
- Configuration**
- Settings
- User Guide
- Logout

Bulk Upload

Upload

File: [Browse...](#) [Upload](#)

Examples: [caregivers.csv](#) [users.csv](#) [contacts.csv](#)

Bulk Upload Results

Row#	Sta...	Error Message	Line
No entries			

User Synchronization

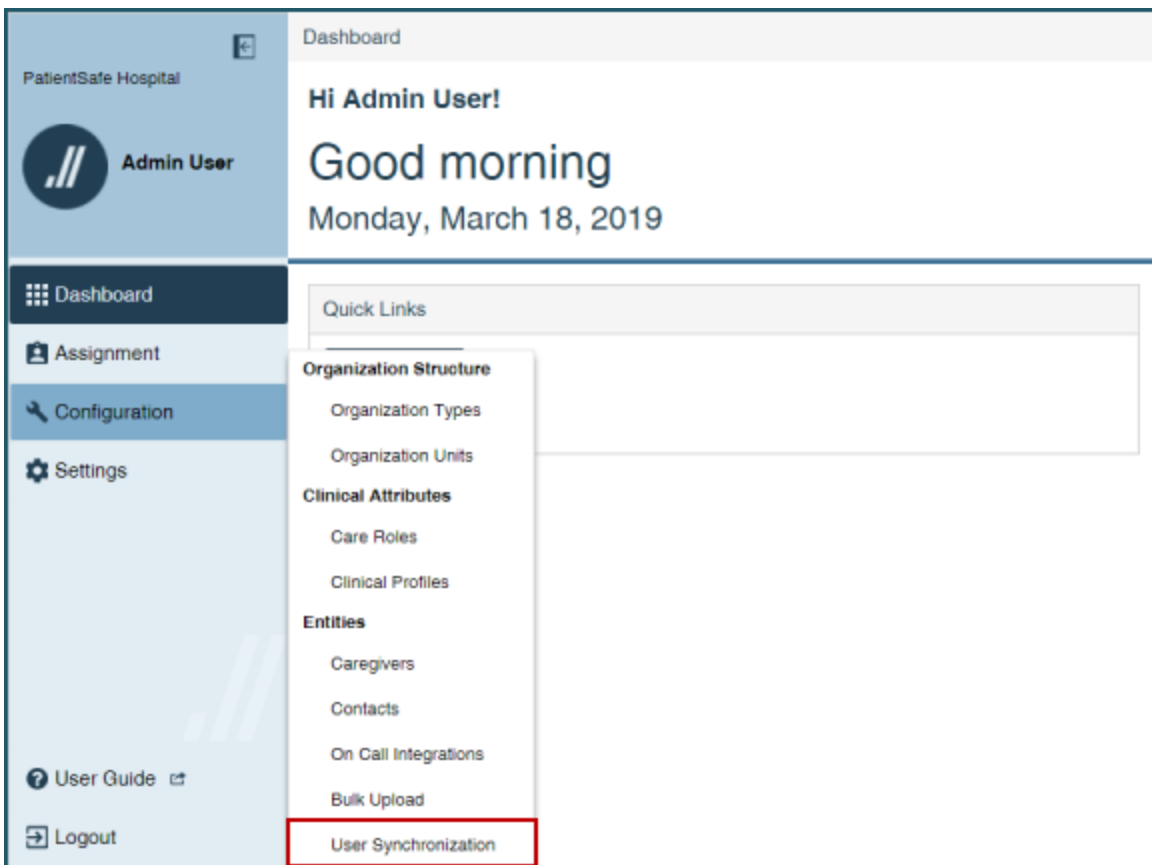
User Synchronization is used to import and map LDAP/AD users into the PatientTouch application. Hospitals need to work with the PatientSafe Solutions Tech Ops team to define the search filters prior to synchronizing them with Enterprise Manager. Once the search filters have been created, users can configure automatic, scheduled, or manual uploads. Depending on the LDAP/AD mapping, users may be added, inactivated, or deleted. If user is inactivated, they will be hidden in Contacts and their extension number removed and possibly reassigned. Users must have the "Manage System" permission to use this feature.

Ldap sync filters can be configured as desired. However, the following is as an example of a filter that the PatientSafe Solutions Tech Ops team configures in the definition of an authorization provider:

filter: '(&(sAMAccountName=*)(memberof=CN=Pss Users,OU=Security Groups,DC=test,DC=com))'

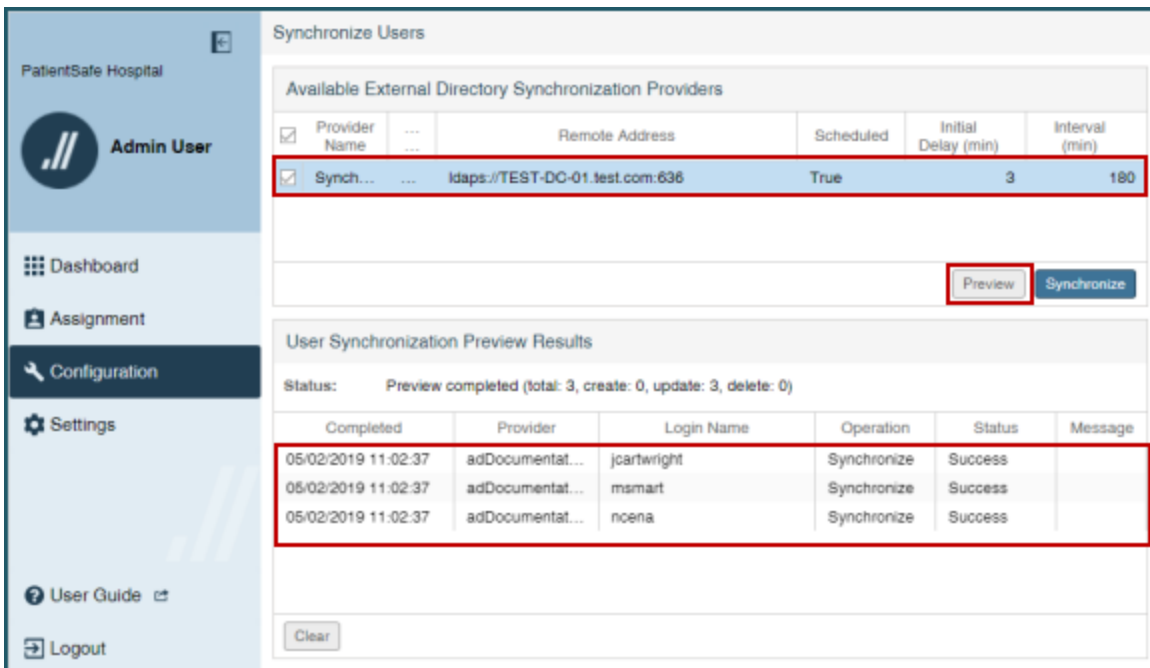
Follow the instructions below to sync users:

1. From the Dashboard, click **Configuration>User Synchronization**.



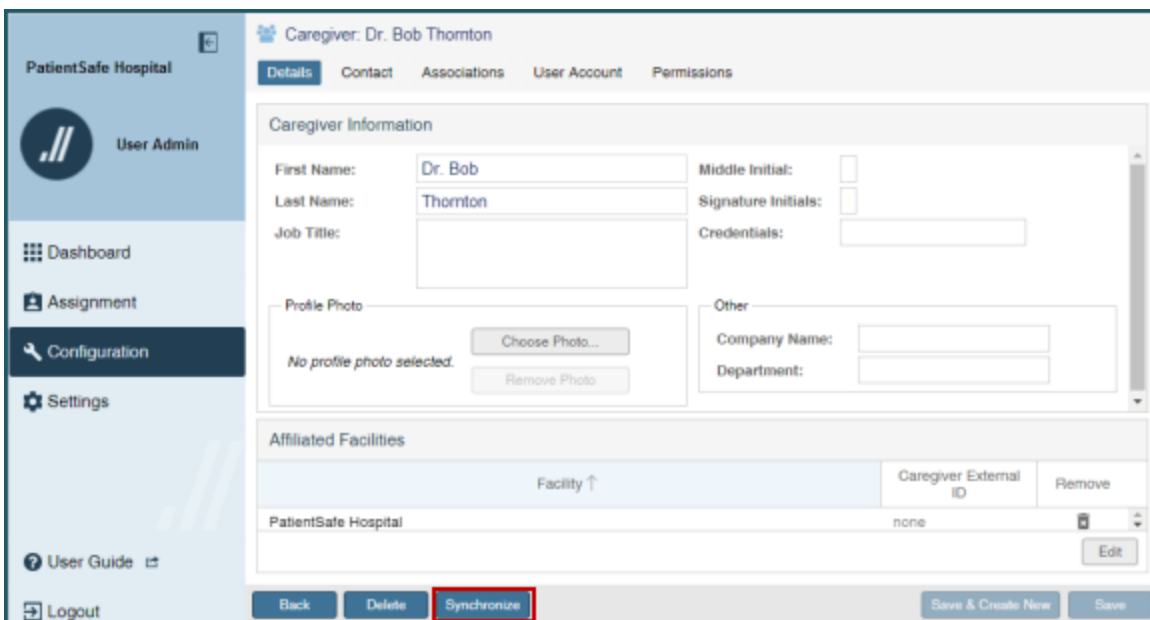
2. A list of **Available External Directory Synchronization Providers** should be displayed.
3. Click the check box under Provider Name.
4. Click **Preview**.

5. The **User Synchronization Results** displays.
6. If the results display as desired, click **Synchronize**.



Individual User Sync

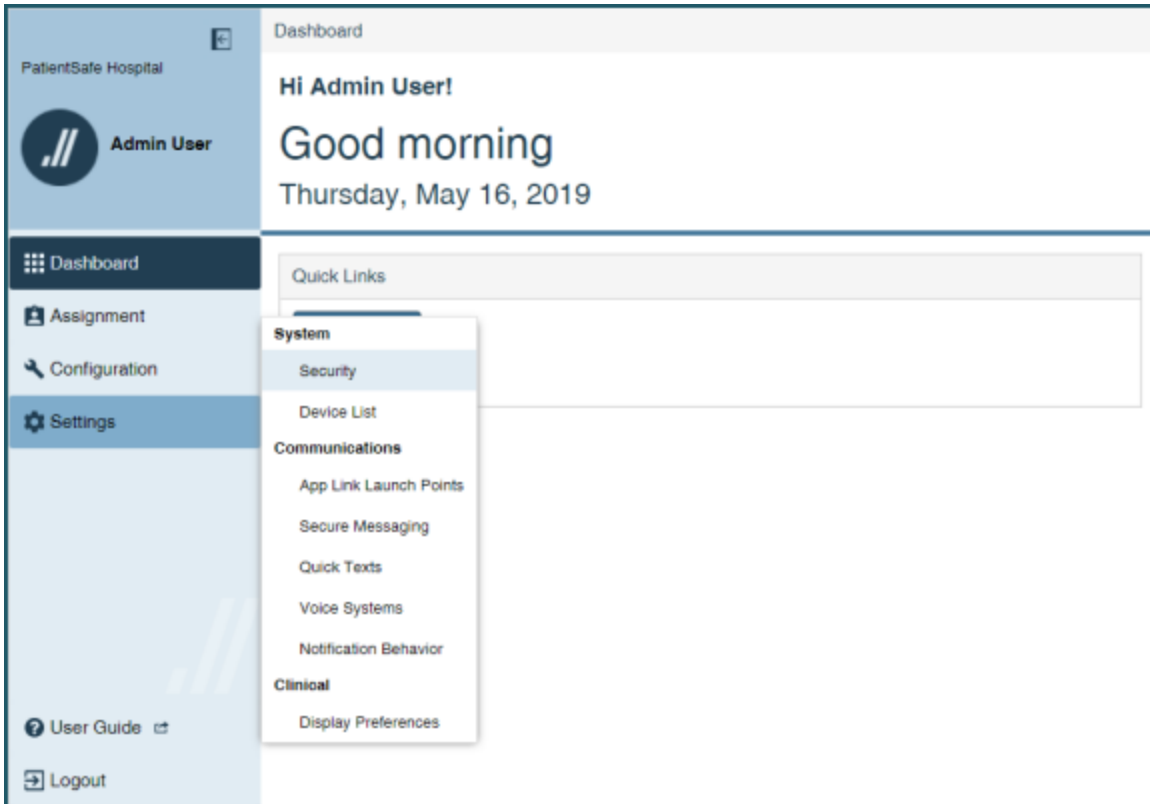
After users have been synced to the Enterprise Manager, AD information may change, and one user may now have a different extension number. To quickly update this user's information, click on the **Synchronize** button on the bottom of their Caregiver screen.



System Settings

Security

1. To view System Settings from the Dashboard, click Settings>Security.



2. Use the descriptions in the tables and screen shots below to complete the fields.

System Display Name The system name that displays in the top left hand corner of your screen in Enterprise Manager.

Advanced Settings

Cellular Calling Enabled: Enter "true" to enable cellular calling. Enter "false" to disable cellular calling.

Cellular Calling Extension Length: Extension Dialing Only: A number, typically from 4-6, that includes the number of digits of internal extensions.

Cellular Calling Prefix: Extension Dialing Only: A centralized number, provided by the IT department, that includes pauses or wait characters.

Cellular Calling Prefix Extensions: Extension Dialing Only: Special internal hospital codes, such as 02 for code blue or 03 for code gray.

Client Crash Logging (Crashlytics) :

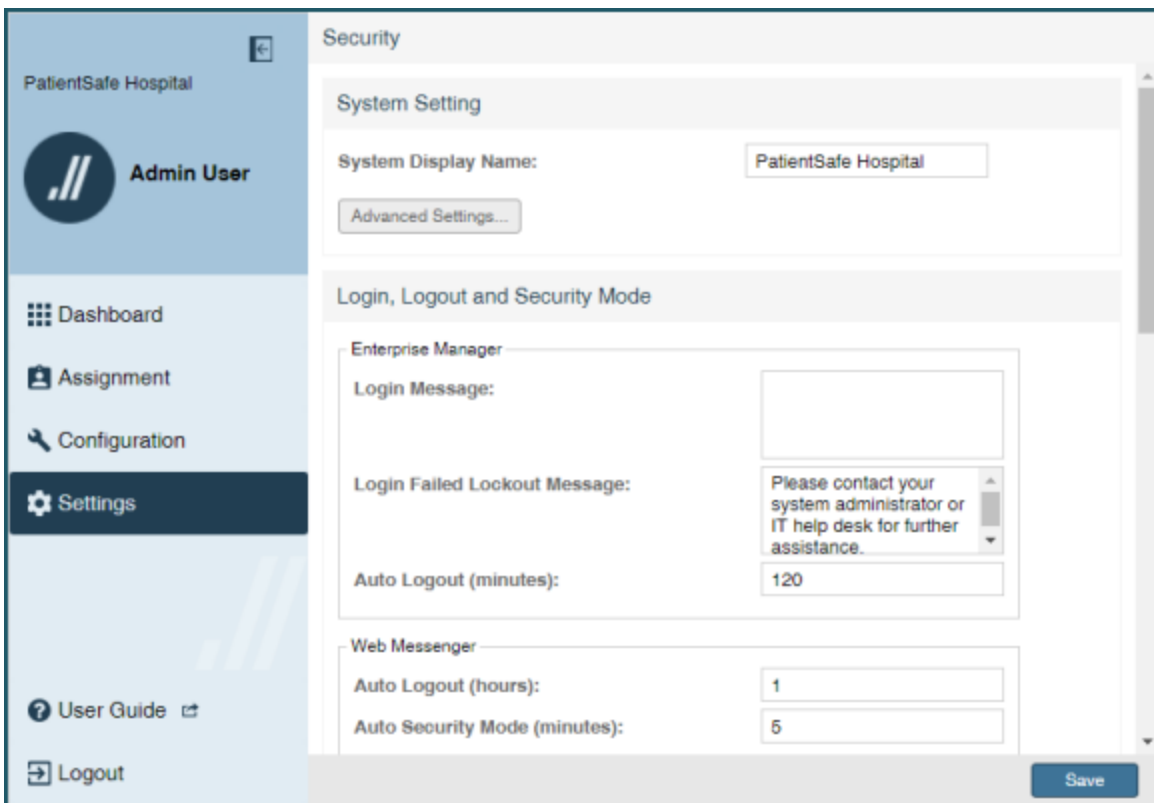
Enable External Authentication: Enables multi-factor authentication. When enabled, users who are outside a hospital's network will be able to log into PatientTouch using SAML Integration.

Disable Optimized Ping:

APNS (Apple Push Notification Service) (iOS) & **FCM (Google Firebase Cloud Messaging)** (Android) Push Notifications

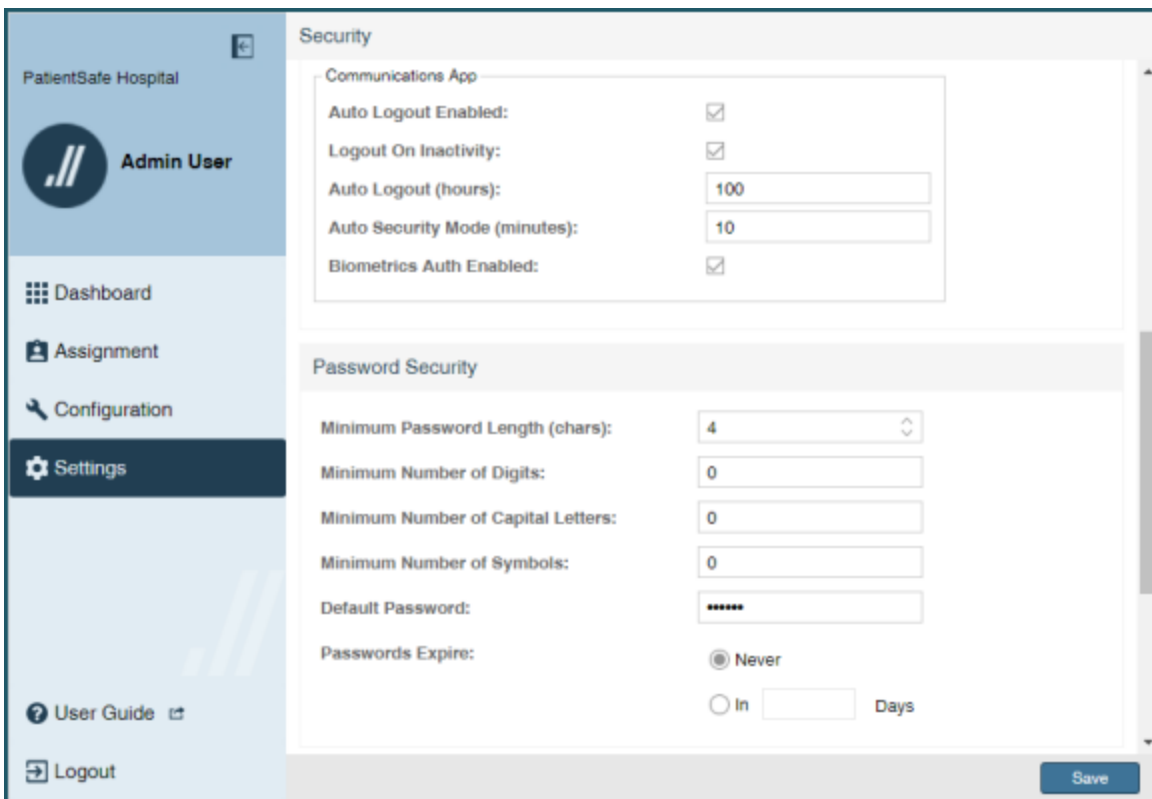
Default Preferred Contact Method: For use on iOS, Android, and Web Messenger clients. Select the contact method from the drop down menu that is the 'default preferred' contact method if there are multiple ways to contact a caregiver. Examples might include business phone, pager, email, etc. PatientTouch client application settings will override the Default Preferred Contact Method.

- Login Message** For the Enterprise Manager: Enter the message you want users to see upon logging in.
- Login Failed Lockout Message** For the Enterprise Manager: Enter the text to display to users on their next Enterprise Manager login attempt if they did not change their password before the expiration period ends, or if the user's login fails after three attempts. For example, "Please contact your system administrator or IT help desk for further assistance."
- Auto Logout (minutes)** For the Enterprise Manager: Enter the number of minutes users will be automatically logged out of the Enterprise Manager if there is no activity.
- Auto Logout (hours)** For the Web Messenger: Enter the number of hours users will be automatically logged out of the Web Messenger if there is no activity.
- Auto Security Mode (minutes)** For the Web Messenger: Enter the number of minutes before Web Messenger automatically enters Security Mode. Users will need to re-enter their password or PIN to log in again.



- Auto Logout Enabled** For users of PatientTouch Communications: Check this box to have PatientTouch Communications devices automatically logged out after the designated time frame. When checked, the Logout On Inactivity and Auto Logout (hours) fields become active.

- Logout On Inactivity** **For users of PatientTouch Communications:** Check this box to have users automatically logged out the PatientTouch Communications application when there is no activity for the designated time in Auto Logout (hours).
- Auto Logout (hours)** **For users of PatientTouch Communications:** If the Auto Logout Enabled check box is enabled, enter the number of hours users will be automatically logged out.
- Auto Security Mode (minutes)** **For users of PatientTouch Communications:** Enter the number of minutes before the PatientTouch Communications application automatically enters Security Mode. Users will need to re-enter their password or PIN to log in again.
- Biometrics Auth Enabled** **For users of PatientTouch Communications:** When selected, this feature enables Touch ID, Face ID, and Fingerprint Sign In. Refer to the next topic titled Configuring Biometric Authentication.
- Minimum Password Length (chars)** Enter the minimum character password length for passwords.
- Minimum Number of Digits** Enter the minimum number of digits for passwords.
- Minimum Number of Capital Letters** Enter the minimum number of capital letters for passwords.
- Minimum Number of Symbols** Enter the minimum number of symbols for passwords.
- Default Password** The initial default password for new users is “1234”. You can specify a different default password for new users.
- Passwords Expire** Select the Never option or specify the number of days before all users are required to change their passwords.



Enable PIN Authentication

For PatientTouch Communications for iOS and Android users only. Select to enable PIN authentication, which allows users to set a PIN using the Enterprise Manager. PINs are used to log back into the PatientTouch Communications application after it has been in Security mode.

PIN Length

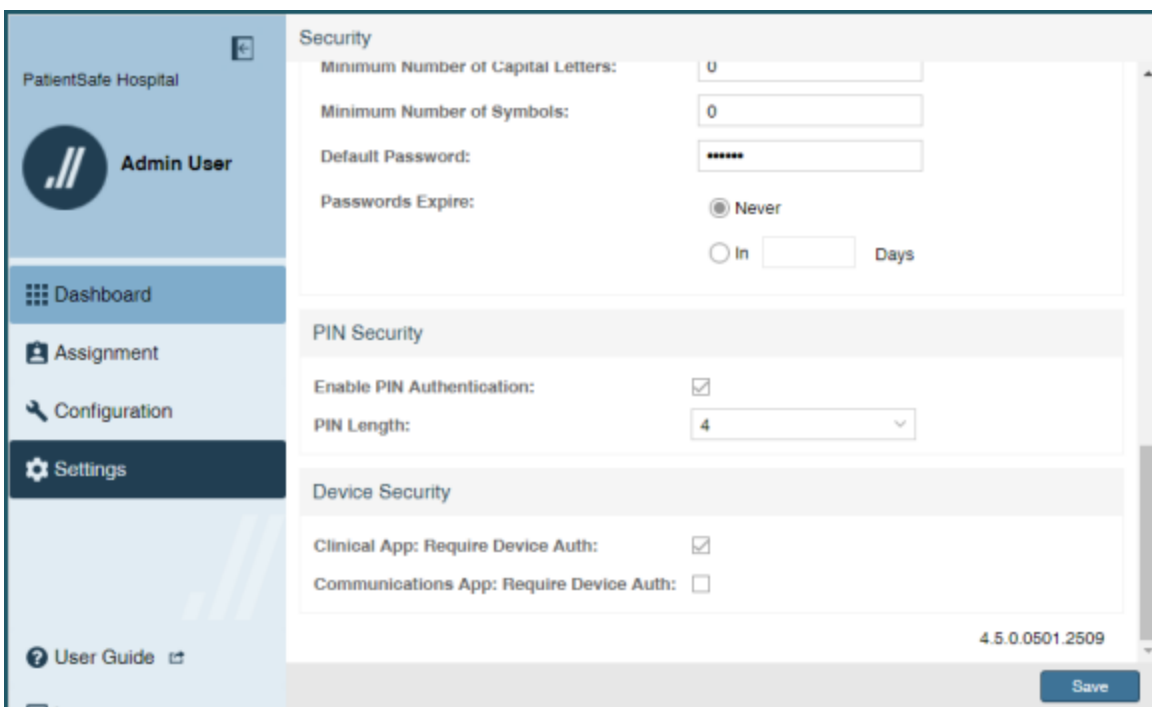
The default PIN length is 4 characters. However, this can be modified if your hospital has specific requirements for PIN format.

Clinical Application: Require Device Authorization

When selected, only users with the appropriate security access are able to authorize devices upon first use. When the check box is disabled, all users are able to authorize their own devices. The "Authorization" dialog that appears upon first use of the handheld will no longer appear. The user that first logs in to the handheld becomes the "Authorizing User." All device information is tracked as usual in the Devices tab.

PatientTouch Communications Application: Require Device Authorization

When selected, only users with the appropriate security access are able to authorize devices upon first use. When the check box is disabled, all users are able to authorize their own devices. The "Authorization" dialog that appears upon first use of the handheld will no longer appear. The user that first logs in to the handheld becomes the "Authorizing User." All device information is tracked as usual in the Devices tab.



3. Click **Save** to save your changes.

Configuring Biometric Authentication

Please click a link below to access more information.

[Feature Overview](#)

[Enabling and Disabling Biometric Authentication](#)

[End User Experience](#)

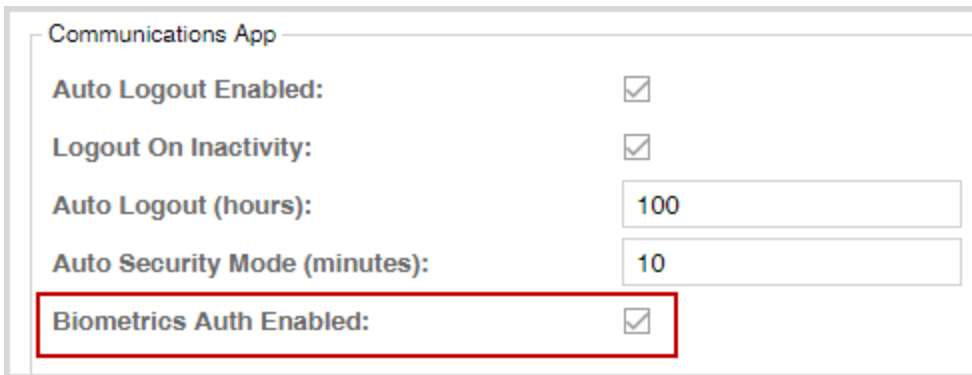
Feature Overview

Biometric Authentication is for PatientTouch Communications BYOD users who have biometric authentication (fingerprint or facial recognition) configured on their devices. Organizations can control enablement of biometric authentication in Enterprise Manager.

Biometric Authentication reduces the amount of time it takes for BYOD users to login and re-authenticate to PatientTouch by using biometric authentication.

Enabling and Disabling Biometric Authentication

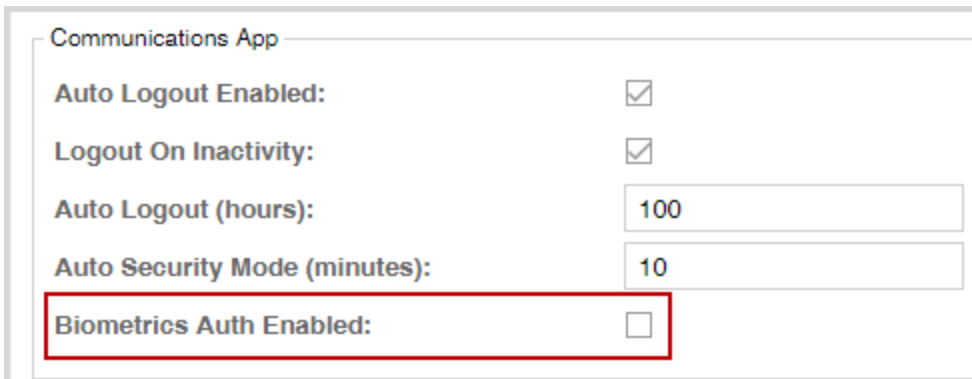
To enable this feature, access Settings>System and click the Biometrics Auth Enabled checkbox.



The screenshot shows the 'Communications App' settings. The 'Biometrics Auth Enabled' checkbox is checked and highlighted with a red box. Other settings include 'Auto Logout Enabled' (checked), 'Logout On Inactivity' (checked), 'Auto Logout (hours)' (100), and 'Auto Security Mode (minutes)' (10).

Auto Logout Enabled:	<input checked="" type="checkbox"/>
Logout On Inactivity:	<input checked="" type="checkbox"/>
Auto Logout (hours):	100
Auto Security Mode (minutes):	10
Biometrics Auth Enabled:	<input checked="" type="checkbox"/>

To disable this feature, deselect the Biometrics Auth Enabled checkbox.



The screenshot shows the 'Communications App' settings. The 'Biometrics Auth Enabled' checkbox is unchecked and highlighted with a red box. Other settings include 'Auto Logout Enabled' (checked), 'Logout On Inactivity' (checked), 'Auto Logout (hours)' (100), and 'Auto Security Mode (minutes)' (10).

Auto Logout Enabled:	<input checked="" type="checkbox"/>
Logout On Inactivity:	<input checked="" type="checkbox"/>
Auto Logout (hours):	100
Auto Security Mode (minutes):	10
Biometrics Auth Enabled:	<input type="checkbox"/>

End User Experience

Once the settings have been configured in the Enterprise Manager, the user will be able to configure their iOS or Android device.

Click here to view the end user experience for logging in with:

[Touch ID \(iOS\)](#)

[Face ID \(iOS\)](#)

[Fingerprint Sign In \(Android\)](#)

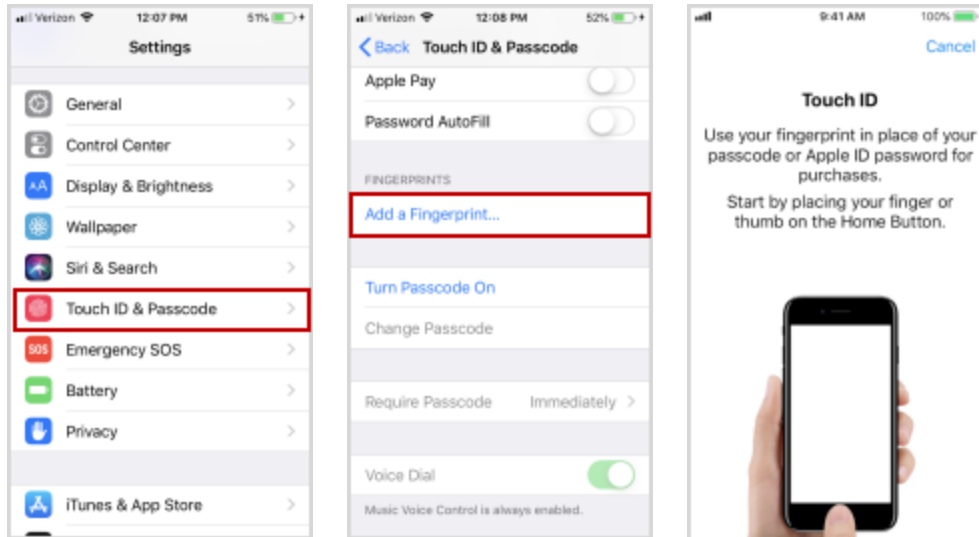
Log in by Touch ID (iOS)

PatientTouch Communications provides Biometric Authentication as an option to log into the application.

- iPhone 6, 7, 8 supports Touch ID
- iPhone X supports Face ID

Users must have Touch ID configured on their device to use this feature. Use the instructions below to add a fingerprint.

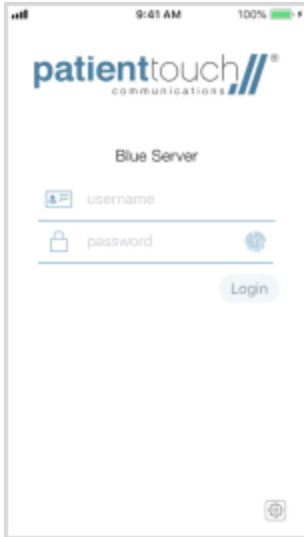
Note You will need your Apple ID to complete the fingerprint sign in process.



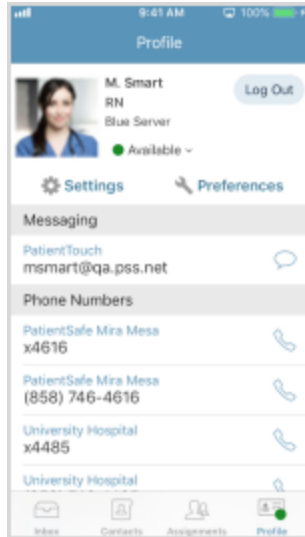
1. On your iPhone, select: **Settings>Touch ID & Passcode.**
2. Select **Add a Fingerprint.**
3. Place your finger/thumb on the Home button, repeating as the instructions allow, and follow the prompts (including the ones to enter a passcode).

After setting up your fingerprint profile, navigate to the PatientTouch Communications log in screen. You should see a blue thumbprint in the password line.

Note If you do not see a thumbprint on the password line, your facility may not have this feature enabled.



4. Log into PatientTouch Communications.



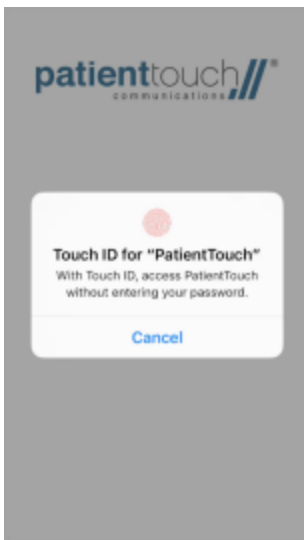
5. Navigate to your profile and



6. Select Touch ID and enter your PatientTouch password to enable the process.

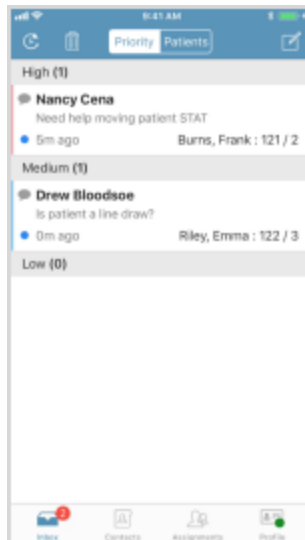
Log out and log back in. Use the instructions below to log in using Touch ID.

Login with Touch ID



1. When the application is launched, an alert displays, asking you to use **Touch ID**.

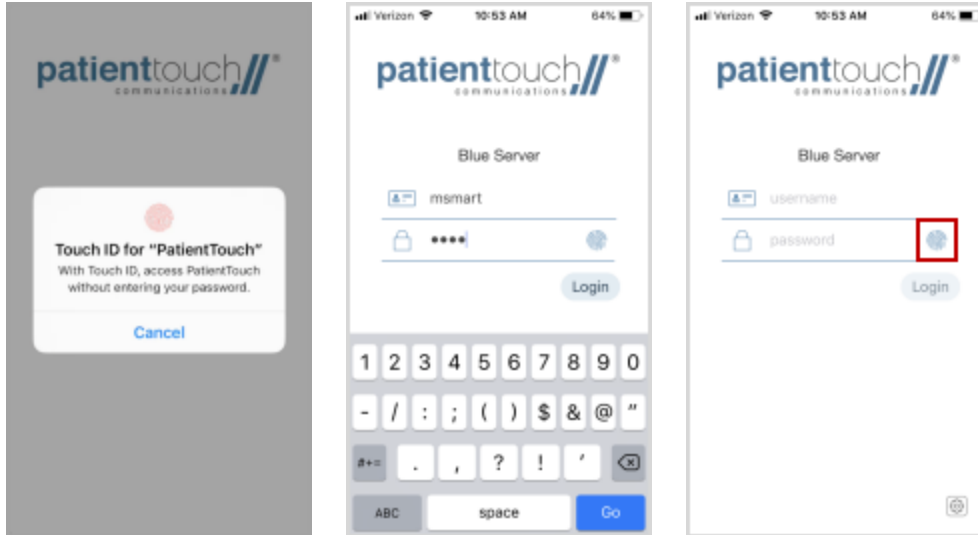
2. Press your finger/thumb on the **Home** button of your device.



3. You automatically advance to the PatientTouch Communications Inbox.

How to Login with User Name and Password

For users who do not want to login using Touch ID, please use the instructions below.



1. Touch **Cancel** on the Touch ID Sign In alert to log in with your user name and password.
2. Enter your user name and password.
3. Touch Login.
4. Or, if you change your mind and want to use Touch ID, touch the fingerprint icon to bring up the alert and log in with Touch ID.

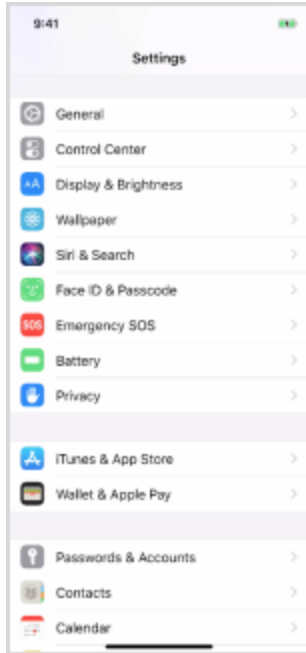
Log in by Face ID (iOS)

PatientTouch Communications provides Biometric Authentication as an option to log into the application.

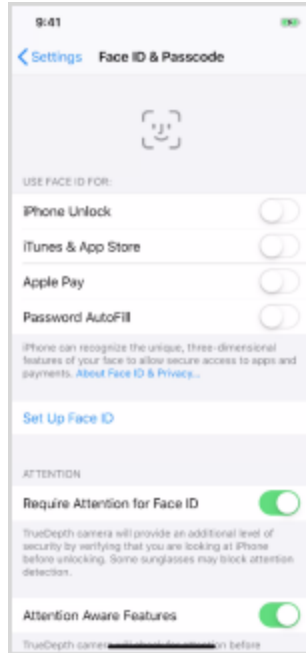
- iPhone 6, 7, 8 supports Touch ID
- **iPhone X** supports Face ID

Users must have Face ID configured on their device to use this feature. Use the instructions below to add Face ID.

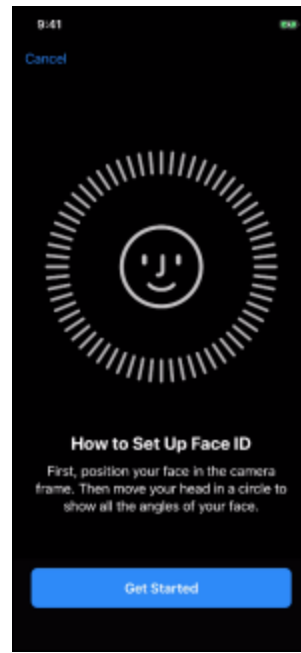
Note You will need your Apple ID to complete the fingerprint sign in process.



1. On your iPhone, select: **Face ID & Passcode.**



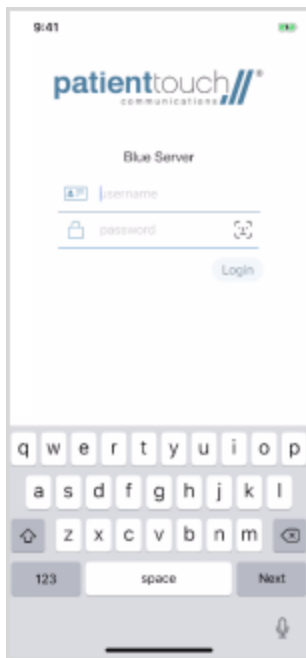
2. Select **Set Up Face ID.**



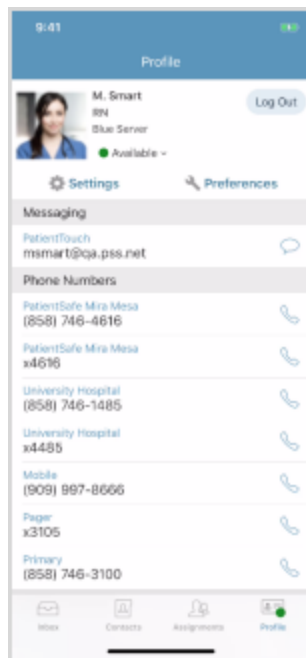
3. Place your face in the camera frame, repeating as the instructions allow, and follow the prompts.

After setting up your Face ID, navigate to the PatientTouch Communications log in screen. You should see a blue thumbprint in the password line.

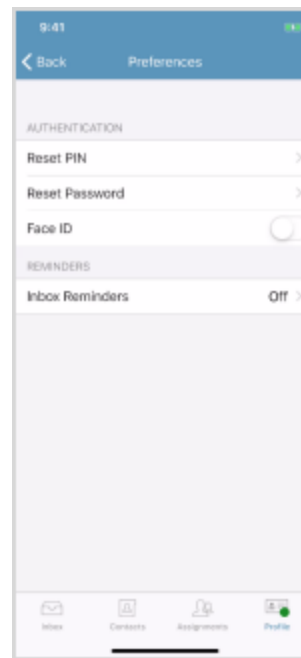
Note If you do not see a thumbprint on the password line, your facility may not have this feature enabled.



4. Log into PatientTouch Communications.



5. Navigate to your profile and touch **Preferences.**

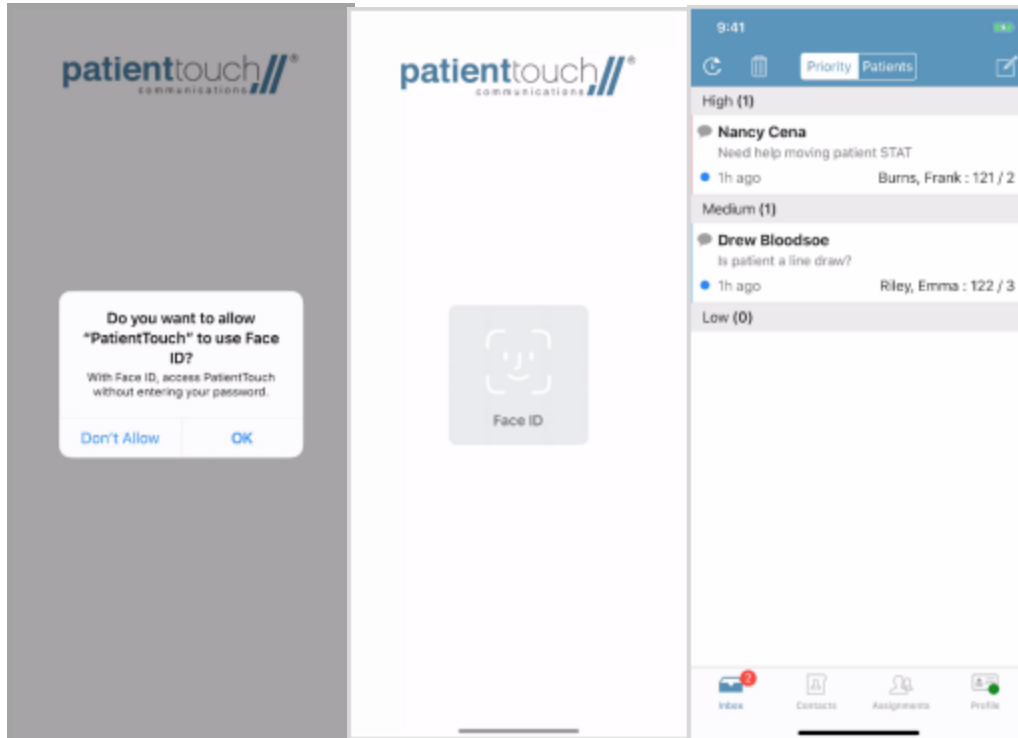


6. Select **Face ID** and enter your password to enable the

process.

Log out and log back in. Use the instructions below to log in using Face ID.

Login with Face ID Sign In



1. Upon first launching the application with Face ID enabled, a message displays asking if you want to allow PatientTouch to use Face ID.

2. Touch **OK**.

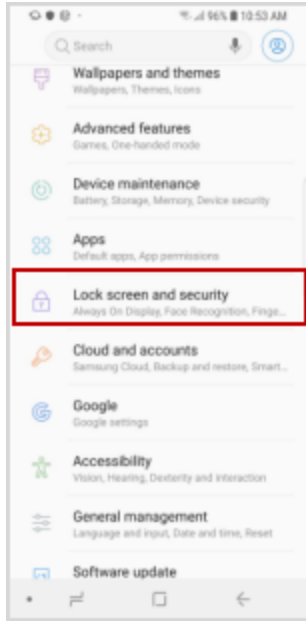
3. Place your face in front of the camera and wait for PatientTouch Communications to log you in.

4. You automatically advance to the PatientTouch Communications Inbox.

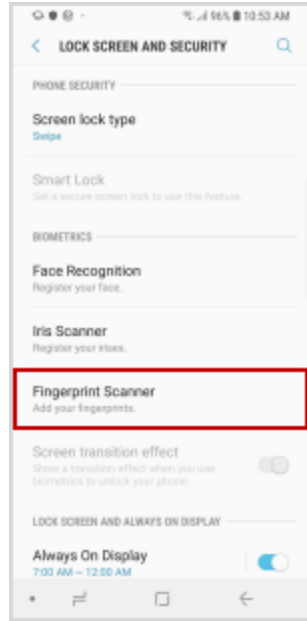
Log in with Fingerprint Sign In (Android)

PatientTouch Communications provides Fingerprint Sign In on any non-shared device, or, devices with "In-hospital Shared Device" turned off. Fingerprint Sign In works on any Android device that has an operating system post-Marshmallow.

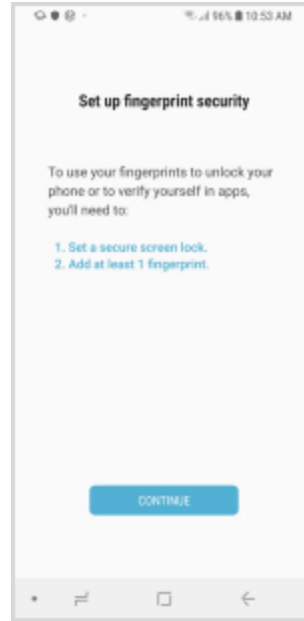
Users must have Fingerprint Sign In configured on their device to use this feature. Use the instructions below to add a fingerprint.



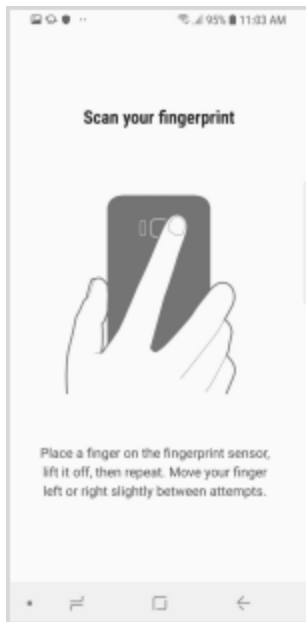
1. Access **Settings** on your Android device.
2. Select **Lock screen and security**.



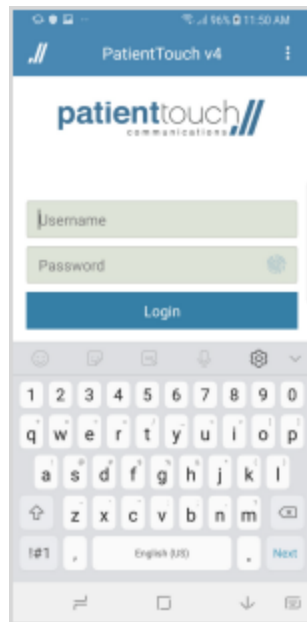
3. Touch **Fingerprint Scanner**.



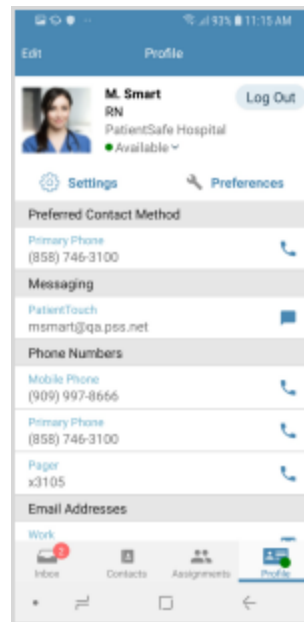
4. Touch **Continue** and add a password or pin.
5. Follow all prompts.



6. Place your finger on the **BACK** of your device on the fingerprint sensor, repeating as the instructions allow.
7. Follow all prompts.



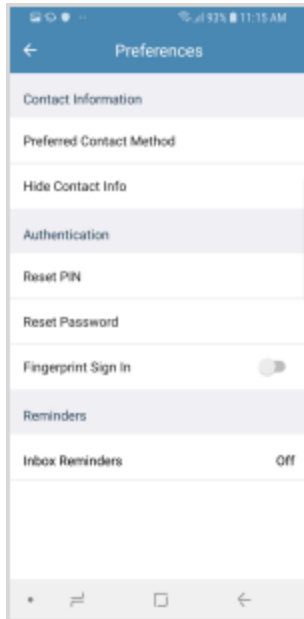
8. After setting up your fingerprint, you should see a blue thumbprint in the password line of the PatientTouch Communications application.



10. Access the Profile>Preferences screen.

9. Log in with your PatientTouch user name and password.

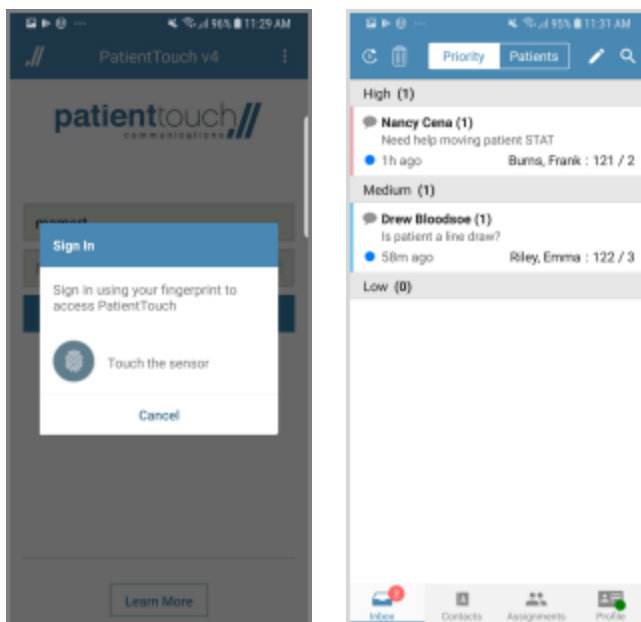
Note If you do not see a thumbprint on the password line, your facility may not have this feature enabled.



11. Select **Fingerprint Sign In** and enter your PatientTouch password to enable the process.

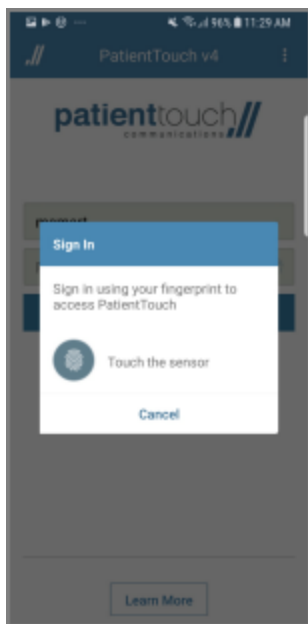
Log out and log back in. Use the instructions below to log in using Fingerprint Sign In.

Login with Fingerprint Sign In

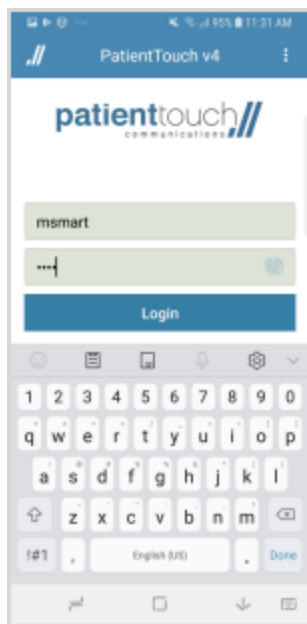


1. Launch the PatientTouch Communications application.
2. The login screen displays an alert asking you to use **Fingerprint Sign In** to login.
3. Press your finger on the fingerprint sensor located on the back of the device.
4. You automatically advance to the PatientTouch Communications Inbox.

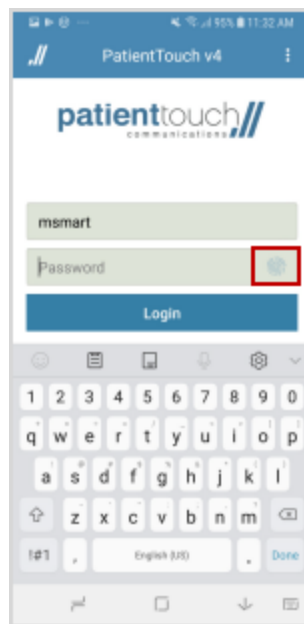
Login with User Name and Password



1. Touch **Cancel** on the Fingerprint Sign In alert to log in with your user name and password.



2. Enter your user name and password.
3. Touch Login.

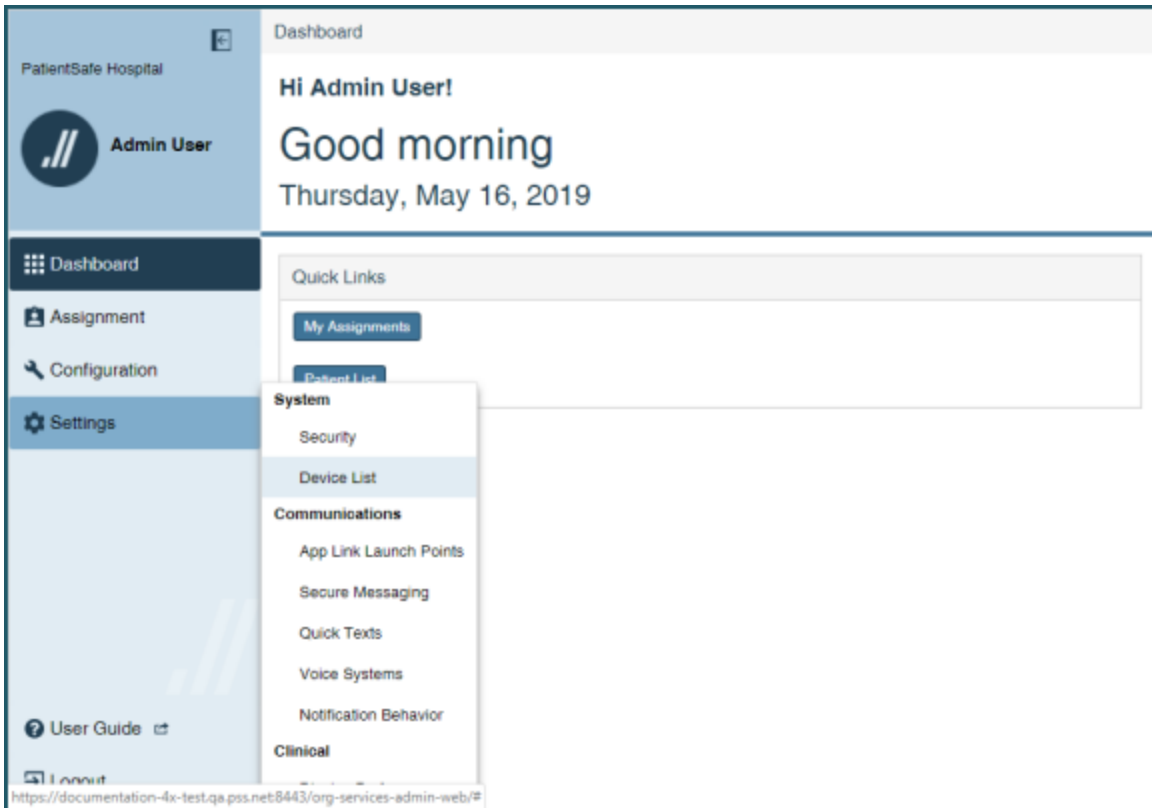


4. Or, touch the fingerprint icon, to bring up the alert and log in with Fingerprint Sign In.

Device List

System administrators use the device list to view and manage handhelds. For example, they can see all devices within a facility in order to validate and verify those that are logged in.

1. To view the Device List from the Dashboard, click Settings>Device List.



The following information displays in the Device List:

Login Facility	Select the specific facility for which you want to view and manage the handhelds. Or select All to view information on all devices in all facilities.
Client Identifier	Unique identification number (UUID) of the handheld found in the Diagnostics screen.
Authorization	Allowed indicates the device was authorized. Denied indicates the device was not authorized.
Status	Indicates the status of the handheld whether offline or online.
Last Login	The date/time the user last logged into the handheld.
Last Used By	Indicates the individual who last signed on to the handheld. Note that this is especially useful in locating a missing device.
Application	Lists the PatientTouch application the user logged into.
PSS Version	Version of the PatientTouch application that displays on the handheld.
OS	Operating System
OS Version	iOS Version installed on the iPhone.

Device List Facility: All

Client Identifier	Autho...	Status	Last Login	Last Used By	Application	PSS Ver...	OS	OS Ver...
HH_3C289648-7C7A-4935-88E...	Allow		04/29/2019 10:15...	joarwright (Judy ...	PatientTouchClini...	4.5...	i...	12.2
AB_027a82f5ada5e61d	Not E...		04/22/2019 09:35...	msmart (M. Smart)	PatientTouchCom...	4.5...		8.0.0
HC_31DCFCF6-BA0C-4769-99...	Not E...	Offline	04/16/2019 09:40...	raberrombie (Ro...	PatientTouchCom...	4.5...		12.1.4
HH_8F248284-DE71-4909-8CA...	Allow	Offline	05/07/2019 14:46...	karibus (Kelly Airb...	PatientTouchClini...	4.5...	i...	12.2
HC_A0177611-367D-4D1B-89...	Not E...	Offline	05/09/2019 09:59...	banderson (Becky...	PatientTouchCom...	4.5...	i...	12.2
HB_A0177611-367D-4D1B-B97...	Not E...	Offline	04/25/2019 11:56...	jarundell (Jay Aru...	PatientTouchCom...	4.5...	i...	12.2
HB_31DCFCF6-BA0C-4769-99...	Not E...	Offline	04/17/2019 14:39...	sjohnson (Sam Jo...	PatientTouchCom...	4.5...	i...	12.1.4
HH_F4EB9256-D031-4037-82A...	Allow		04/16/2019 09:49...	ehuang (Ed Huang)	PatientTouchClini...	4.4...		12.2
HH_106E1687-E0C0-4451-9FF...	Allow	Offline	04/16/2019 15:19...	pssadmin (Admin ...	PatientTouchClini...	4.5...	i...	12.2
HH_AEF5473-25F1-4DA4-BF...	Allow		04/18/2019 15:22...	ehuang (Ed Huang)	PatientTouchClini...	4.5...	i...	12.2
HB_FCF24289-1B5A-48AA-AF...	Not E...		04/29/2019 09:52...	joarwright (Judy ...	PatientTouchCom...	4.5...	i...	12.2
HC_FCF24289-1B5A-48AA-AF...	Not E...	Offline	05/06/2019 12:00...	jarundell (Jay Aru...	PatientTouchCom...	4.5...	i...	12.2
HC_AAB226F2-C5C3-476F-97...	Not E...		05/08/2019 09:27...	ehuang (Ed Huang)	PatientTouchCom...	4.5...	i...	12.2
HH_A09B1ACB-233A-4AAA-9C...	Allow	Offline	05/07/2019 14:08...	labemathy (Linda ...	PatientTouchClini...	4.5...	i...	12.2
HH_D8229C05-2417-4B4C-BC...	Allow	Offline	05/07/2019 14:13...	labemathy (Linda ...	PatientTouchClini...	4.5...	i...	12.2
HC_106A4998-F10D-496D-A1...	Not E...	Offline	05/07/2019 14:14...	labemathy (Linda ...	PatientTouchCom...	4.5...	i...	12.2
HB_48376154-A80C-4E09-8D...	Not E...	Offline	05/10/2019 09:15...	mweiby (Marcus ...	PatientTouchCom...	4.5...	i...	12.2
HC_30934E37-44C9-47F6-8FD...	Not E...	Offline	05/10/2019 09:09...	ncena (Nancy Ce...	PatientTouchCom...	4.5...	i...	12.2

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Broadcast Authorization Clean Up List

- Configure the columns that display on the Device List by clicking the small gray arrow on the top of each column.
- Click Columns and click the check box next to the name of each column you want displayed.

Device List Facility: All

Client Identifier	Autho...	Status	Last Login	Last Used By	Application	PSS Ver...	OS	OS Ver...
HH_3C289648-7C7A-4935-88E...	Sort Ascending		04/29/2019 10:15...	joarwright (Judy ...	PatientTouchClini...	4.5...	i...	12.2
AB_027a82f5ada5e61d	Sort Descending		04/22/2019 09:35...	msmart (M. Smart)	PatientTouchCom...	4.5...		8.0.0
HC_31DCFCF6-BA0C-4769-99...	Columns			raberrombie (Ro...	PatientTouchCom...	4.5...		12.1.4
HH_8F248284-DE71-4909-8CA...	Allow	Offline		karibus (Kelly Airb...	PatientTouchClini...	4.5...	i...	12.2
HC_A0177611-367D-4D1B-89...	Not E...	Offline		banderson (Becky...	PatientTouchCom...	4.5...	i...	12.2
HB_A0177611-367D-4D1B-B97...	Not E...	Offline		jarundell (Jay Aru...	PatientTouchCom...	4.5...	i...	12.2
HB_31DCFCF6-BA0C-4769-99...	Not E...	Offline		sjohnson (Sam Jo...	PatientTouchCom...	4.5...	i...	12.1.4
HH_F4EB9256-D031-4037-82A...	Allow			ehuang (Ed Huang)	PatientTouchClini...	4.4...		12.2
HH_106E1687-E0C0-4451-9FF...	Allow	Offline		pssadmin (Admin ...	PatientTouchClini...	4.5...	i...	12.2
HH_AEF5473-25F1-4DA4-BF...	Allow			ehuang (Ed Huang)	PatientTouchClini...	4.5...	i...	12.2
HB_FCF24289-1B5A-48AA-AF...	Not E...			joarwright (Judy ...	PatientTouchCom...	4.5...	i...	12.2
HC_FCF24289-1B5A-48AA-AF...	Not E...	Offline		jarundell (Jay Aru...	PatientTouchCom...	4.5...	i...	12.2
HC_AAB226F2-C5C3-476F-97...	Not E...			ehuang (Ed Huang)	PatientTouchCom...	4.5...	i...	12.2
HH_A09B1ACB-233A-4AAA-9C...	Allow	Offline		labemathy (Linda ...	PatientTouchClini...	4.5...	i...	12.2
HH_D8229C05-2417-4B4C-BC...	Allow	Offline		labemathy (Linda ...	PatientTouchClini...	4.5...	i...	12.2
HC_106A4998-F10D-496D-A1...	Not E...	Offline		labemathy (Linda ...	PatientTouchCom...	4.5...	i...	12.2
HB_48376154-A80C-4E09-8D...	Not E...	Offline		mweiby (Marcus ...	PatientTouchCom...	4.5...	i...	12.2
HC_30934E37-44C9-47F6-8FD...	Not E...	Offline		ncena (Nancy Ce...	PatientTouchCom...	4.5...	i...	12.2

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Broadcast Authorization Clean Up List

- Double-click a device to see device details.

Device Details

General Info
Client Identifier: HH_3C289648-7C7A-4935-88E2-F9E27F379FEE

Authorization
Authorization: Allow
Time Authorized: Mon Apr 22 2019 12:25:31 GMT-0700 (Pacific Daylight Time)
Authorized By: jcartwright (Judy Cartwright)

Last Known Status
Status:
Facility Name: PatientSafe Mira Mesa
Last Login: Mon Apr 29 2019 10:15:40 GMT-0700 (Pacific Daylight Time)
Last Used By: jcartwright (Judy Cartwright)

Application Information
App Name: PatientTouchClinical
App Version: 4.5.0.1300.28462

Device Information
OS: iOS
OS Version: 12.2
Firmware Version: n/a
IP Address: 10.10.78.96
Jacket Serial ID: n/a
Soft Scan Status: enabled

Close

Configuration Buttons

Three configuration buttons located on the bottom right of the screen will assist you in managing handheld devices. Use the instructions below to manage the handhelds.

PatientSafe Hospital		Device List										Facility:	All	Search
Client Identifier	Auth...	Status	Last Login	Last Used By	Application	PSS Ver...	OS	OS Ver...						
HH_3C289648-7C7A-4935-88E...	Allow		04/29/2019 10:15...	joarwright (Judy ...	PatientTouchClin...	4.5...	i...	12.2						
AB_027a82f5ada96b61d	Not E...		04/22/2019 09:35...	msmart (M. Smart)	PatientTouchCom...	4.5...		8.0.0						
HC_31DCFCF6-BA0C-4769-99...	Not E...	Offline	04/16/2019 09:40...	rabercrombie (Ro...	PatientTouchCom...	4.5...		12.1.4						
HH_8F248284-DE71-4909-8CA...	Allow	Offline	05/07/2019 14:46...	karibus (Kelly Airb...	PatientTouchClini...	4.5...	i...	12.2						
HC_A0177611-367D-4D1B-89...	Not E...	Offline	05/09/2019 09:59...	banderson (Becky ...	PatientTouchCom...	4.5...	i...	12.2						
HB_A0177611-367D-4D1B-B97...	Not E...	Offline	04/25/2019 11:56...	jarundell (Jay Aru...	PatientTouchCom...	4.5...	i...	12.2						
HB_31DCFCF6-BA0C-4769-99...	Not E...	Offline	04/17/2019 14:39...	sjohnson (Sam Jo...	PatientTouchCom...	4.5...	i...	12.1.4						
HH_4EB9256-D031-4037-82A...	Allow		04/16/2019 09:49...	ehuang (Ed Huang)	PatientTouchClini...	4.4...		12.2						
HH_106E1687-E0C0-4451-9FF...	Allow	Offline	04/16/2019 15:19...	pssadmin (Admin ...	PatientTouchClini...	4.5...	i...	12.2						
HH_AEFES473-26F1-4DA4-8F...	Allow		04/18/2019 15:22...	ehuang (Ed Huang)	PatientTouchClini...	4.5...	i...	12.2						
HB_FCF24289-1B5A-4BAA-AF...	Not E...		04/29/2019 09:52...	joarwright (Judy ...	PatientTouchCom...	4.5...	i...	12.2						
HC_AAB226F2-C5C3-476F-97...	Not E...	Offline	05/06/2019 12:00...	jarundell (Jay Aru...	PatientTouchCom...	4.5...	i...	12.2						
HC_AAB226F2-C5C3-476F-97...	Not E...		05/08/2019 09:27...	ehuang (Ed Huang)	PatientTouchCom...	4.5...	i...	12.2						
HH_A09B1ACB-233A-4AAA-9C...	Allow	Offline	05/07/2019 14:08...	labemathy (Linda ...	PatientTouchClini...	4.5...	i...	12.2						
HH_D82290D5-2417-4B4C-BC...	Allow	Offline	05/07/2019 14:13...	labemathy (Linda ...	PatientTouchClini...	4.5...	i...	12.2						
HH_106A4998-F10D-496D-A1...	Not E...	Offline	05/07/2019 14:14...	labemathy (Linda ...	PatientTouchCom...	4.5...	i...	12.2						
HB_48376154-A80C-4E09-8D...	Not E...	Offline	05/10/2019 09:15...	mweiby (Marcus ...	PatientTouchCom...	4.5...	i...	12.2						
HO_30934E37-44C9-47F6-8FD...	Not E...	Offline	05/10/2019 09:09...	ncena (Nancy Ce...	PatientTouchCom...	4.5...	i...	12.2						

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Broadcast Authorization Clean Up List

Broadcast

Users with the appropriate privileges can use the Broadcast button. The Broadcast button allows you to send a text message to all handhelds, or, just the ones that are logged in. For example, a broadcast message might be sent to alert all caregivers that the system will be shut down for maintenance.

1. Click Broadcast and select one of the following settings.

All
Online Only
View Scheduled

Send a message to all handhelds.

Send a message to only the handhelds that are online.

View scheduled broadcast messages.

2. Select the facility to receive the message. Or select All.

Select the handhelds to receive the message: All or Online Only.

Select the Priority: Low, Medium, or High.

3. Enter the desired message in the Message field.

Broadcast

Facility: All

Send To: All

Priority: High

Message: Scheduled maintenance at 5 pm today

Schedule

Cancel Send

4. Click **Send** to send the message right away.
5. Or, click the **Schedule** check box and select the date/time for the message to display on the handhelds.

Broadcast

Facility: All

Send To: All

Priority: High

Message: Scheduled maintenance at 5 pm today

Schedule

Date: 07/09/18

Time: 1:00 PM

Cancel Schedule

6. Click **Schedule**.

Authorization

Click Authorization and select one of the following settings.

Allow Selected

Deny Selected

Click **Allow Selected** to authorize a selected device that has been denied access.

Click **Deny Selected** to deny access to a selected device. Allowing or denying access can be useful when handhelds are missing.

Clean Up List

Click Clean Up List and select one of the following settings.

Remove Selected

By Last Login

Click **Remove Selected** to remove a selected device from the Device List. Click **Yes/No** on the confirmation screen.

Click **By Last Login** to remove devices from a specific facility before a specific date. Select the specific facility and enter the Last Login Date. This will delete all devices where the last login was before the selected date.

Example:

Device Details

Facility:

Remove devices with Last Login date before:

Date:

Devices with activity prior to selected will also be removed.

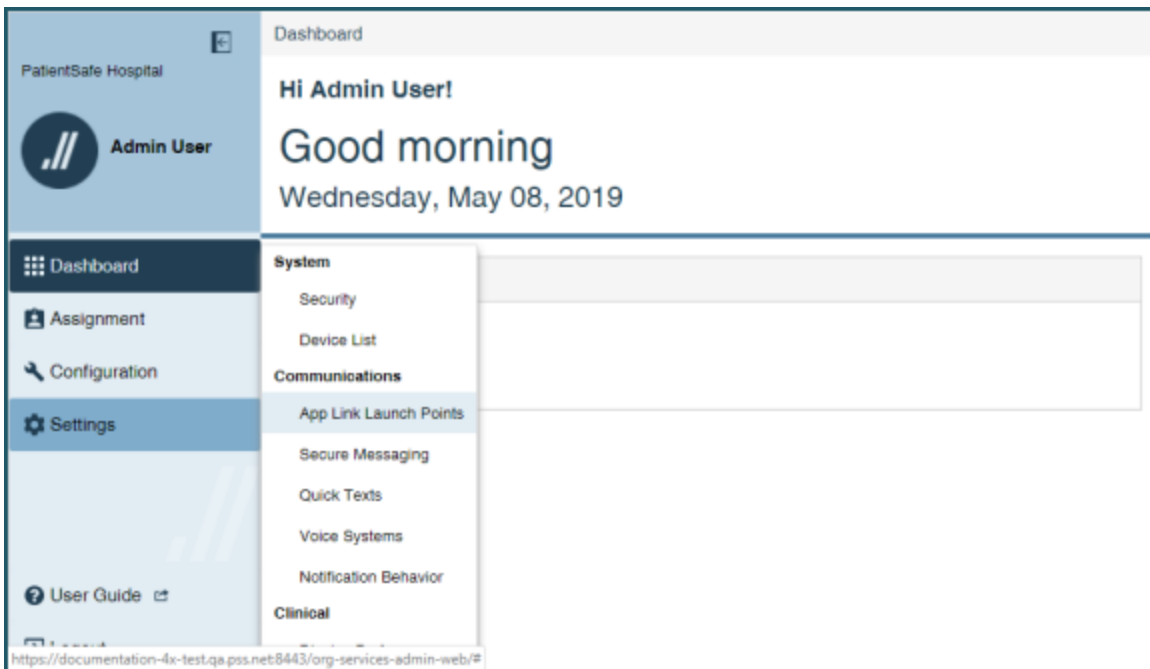
Communications

Communications is only available if you have purchased the Clinical Communications Module.

App Link Launch Points

Customers are actively using Epic Haiku and Rover and want to seamlessly link from these third party apps to PatientTouch. In order to use this feature, system administrators need to be able to manage the launch point configuration for PatientTouch Apps.

1. To access launch points for the Communications module, navigate to the tool bar on the left hand side and click Settings. Then, under Communications select **App Link Launch Points**.

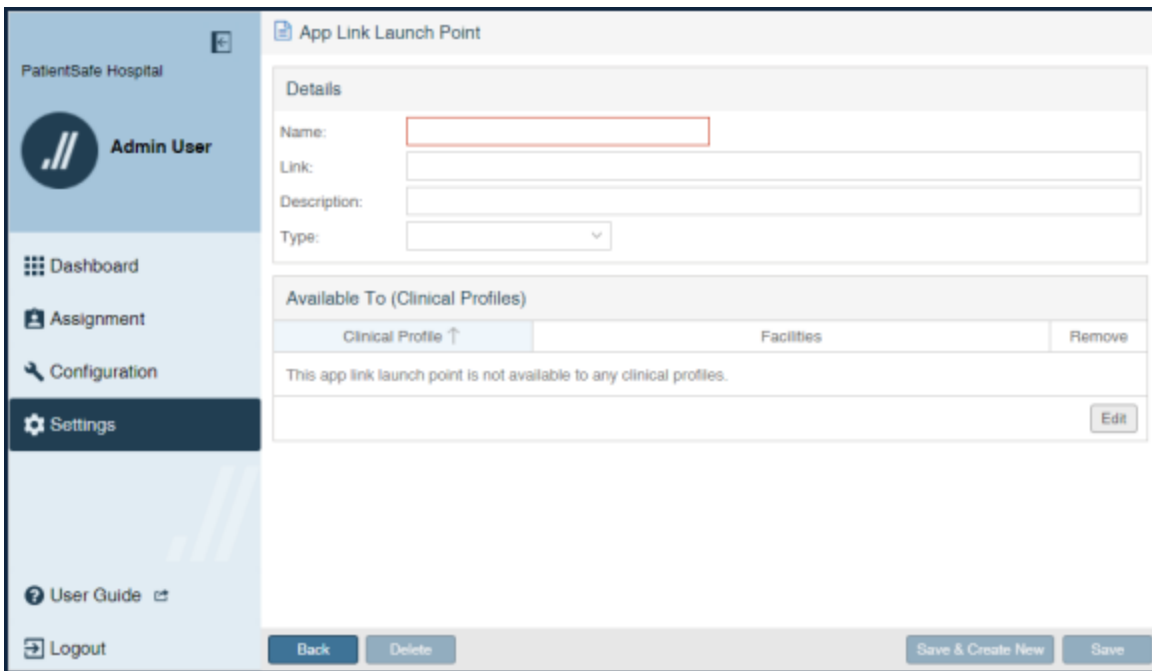


2. Click **Create New**.
3. Use the table below to complete the fields.

Name	The title of the button to be displayed in the iOS/Android clients (ex.: "Epic Rover")
Link	The URI/URL that the button should open when you touch it (ex: epicrover://patientlist)
Description	Not used. Under development.
Type	Determines where the button is displayed in the clients: Patient : patient-info screen and patient-context screen (individual patient) Patient List : assignments/unit-browse screens Use : contact-detail screen (individual contact)

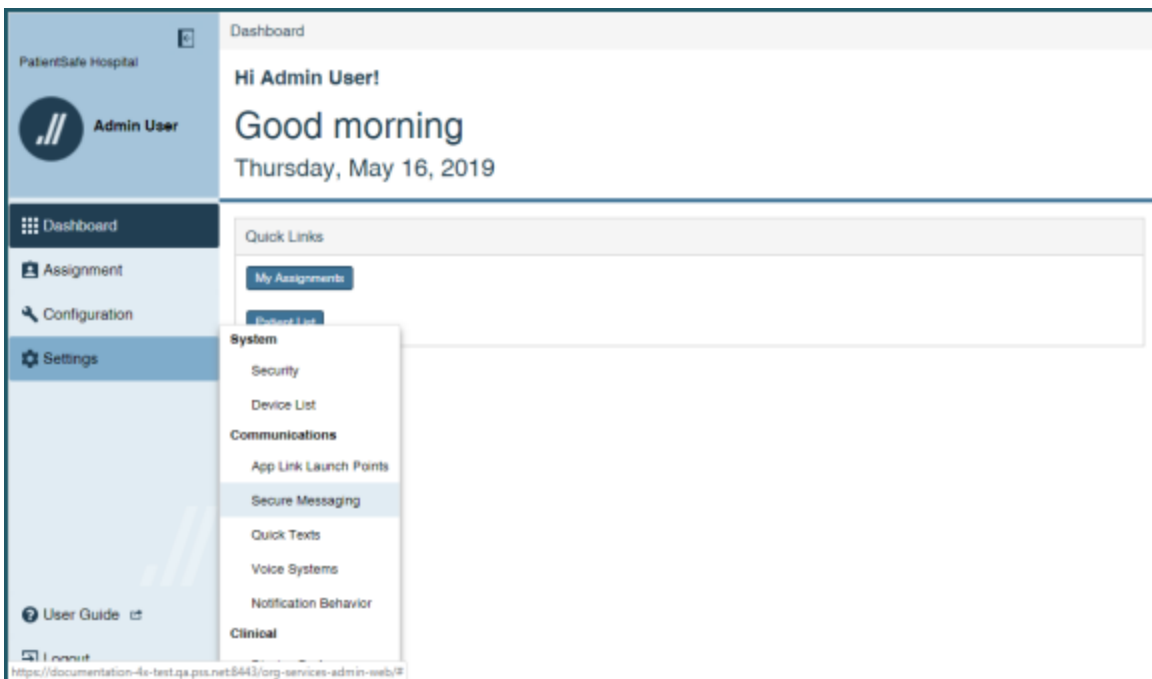
Schedule : currently not used

4. Click **Edit** to add the associated clinical profiles that will be using the app linking feature.

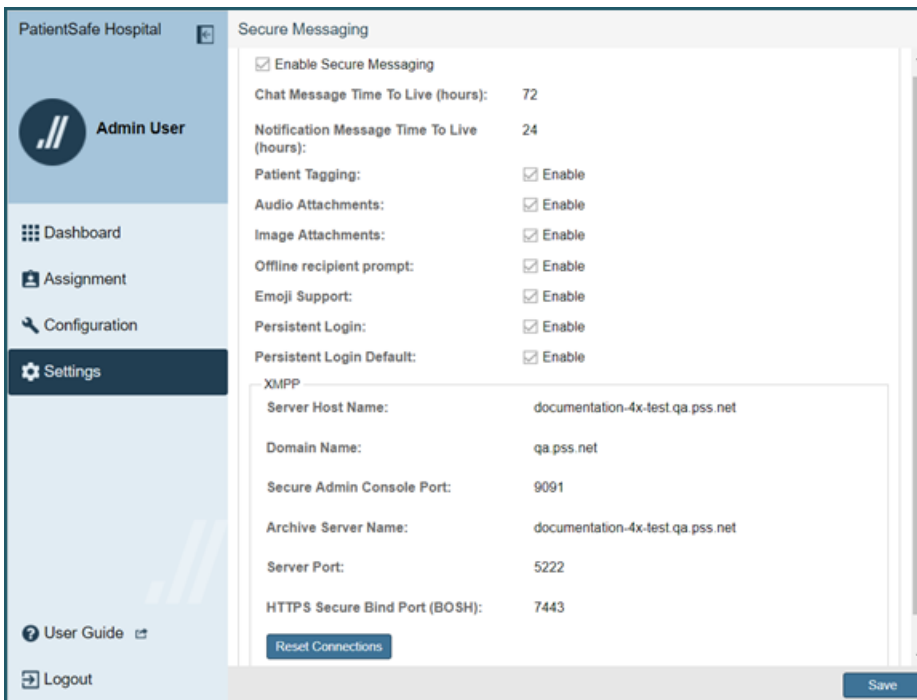


Secure Messaging

To access the settings for the Communications module, navigate to the tool bar on the left hand side and click Settings. Then, under Communications select Secure Messaging.



The *Secure Messaging* screen displays.



Secure Messaging

- Enable Secure Messaging
- Chat Message Time To Live (hours): 72
- Notification Message Time To Live (hours): 24
- Patient Tagging: Enable
- Audio Attachments: Enable
- Image Attachments: Enable
- Offline recipient prompt: Enable
- Emoji Support: Enable
- Persistent Login: Enable
- Persistent Login Default: Enable

XMPP

- Server Host Name: documentation-4x-test.qa.pss.net
- Domain Name: qa.pss.net
- Secure Admin Console Port: 9091
- Archive Server Name: documentation-4x-test.qa.pss.net
- Server Port: 5222
- HTTPS Secure Bind Port (BOSH): 7443

[Reset Connections](#) [Save](#)

Use the table below to learn about the contents of this window.

Enable Secure Messaging	When checked, the <i>Unified Inbox</i> on the handheld displays Inbox and Contacts tabs and caregivers can send text messages to one or more contacts.
Chat Message Time to Live (hours)	This number defines the duration for text messages to persist on the handheld or Web Messenger. The system will delete individual messages after this amount of time.
Notification Message Time To Live (hours)	This number defines the duration for notification messages to persist on the handheld or Web Messenger. The system will delete individual messages after this amount of time.
Patient Tagging	Enables or disables Patient Tagging, or, the ability to tag a patient to a text message.
Audio Attachments	When enabled, users may attach audio recordings to text messages. When disabled, users will still see the microphone icon, however, when selected, they will not be able to attach audio recordings and a message displays "Audio Attachments Disabled by Organizational Policy".
Image Attachments	When enabled, users may attach images to text messages. When disabled, users will still see the camera icon, however, when selected they will not be able to attach an image and a message displays "Image Attachments Disabled by Organizational Policy".
Offline recipient prompt	When enabled, users will receive a notification message when sending a text to a recipient who is offline.
Emoji Support	Enable or disable emoji support for text messages on iOS (Comms and Clinical), Android, and Web Messenger.
Persistent	This setting allows system Administrators to choose whether Persistent Login is available to

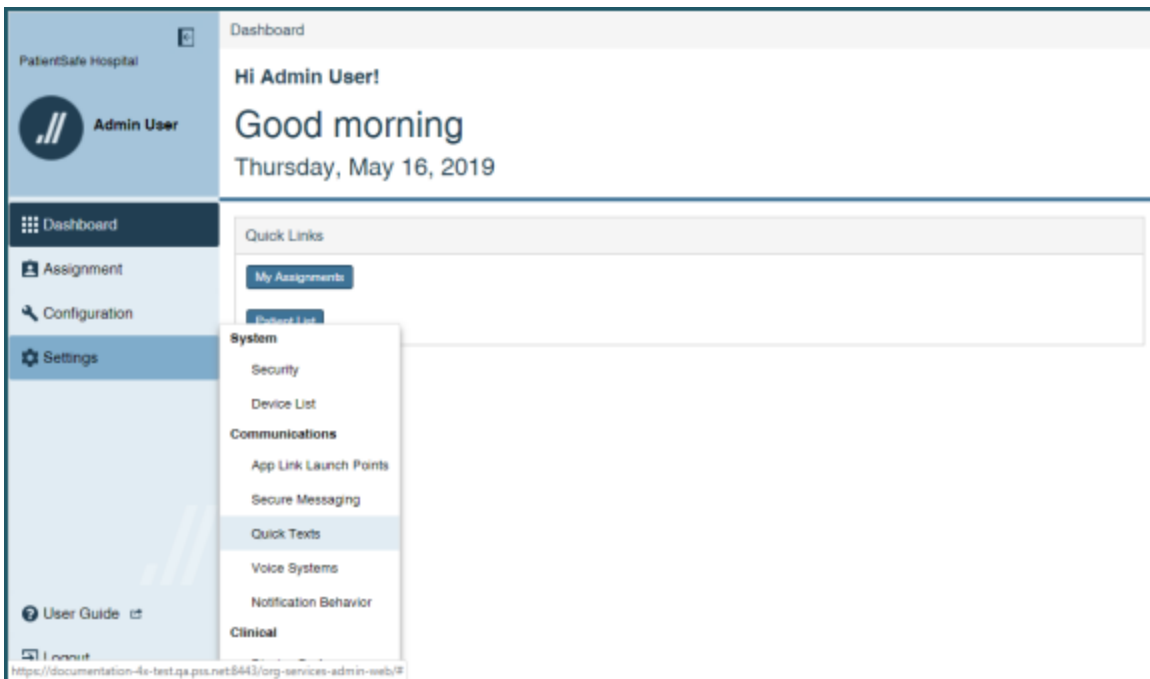
- Login** BYOD users.
- Persistent Login Default** This setting allows system Administrators to choose whether Persistent Login is the default for BYOD users. However, user settings will override any global settings.
- XMPP** These fields automatically display based on input from the servers.

Click **Save** to save your changes.

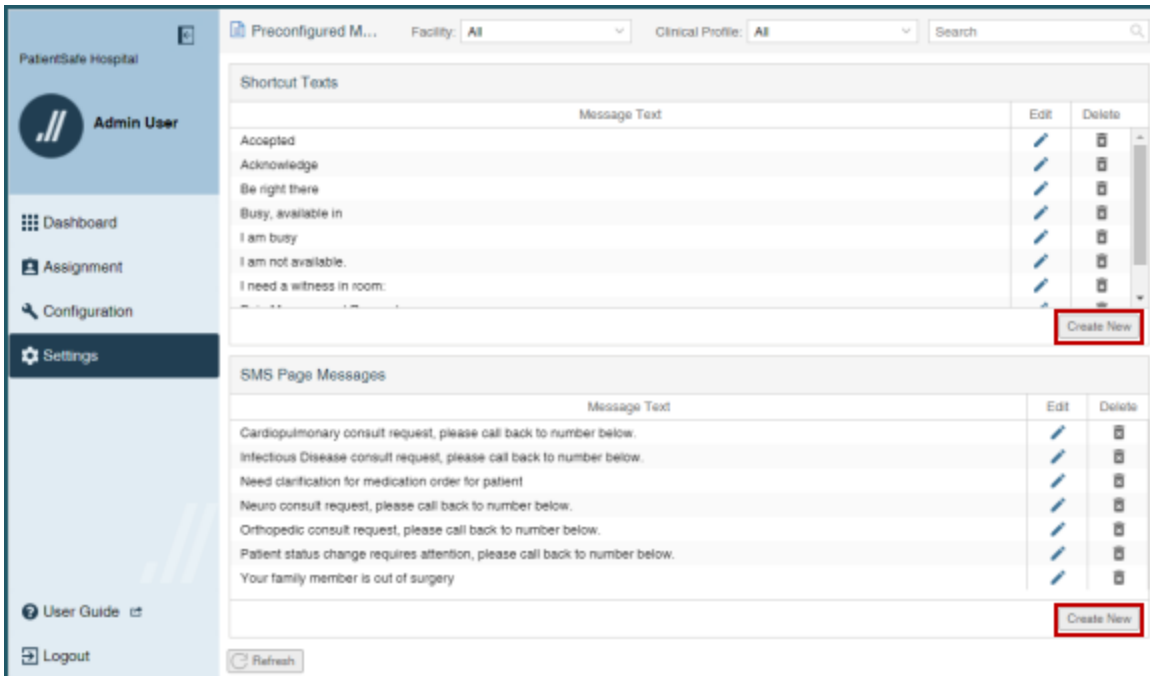
Quick Text Messages

Use role-specific shortcut messages when creating or responding to text messages.

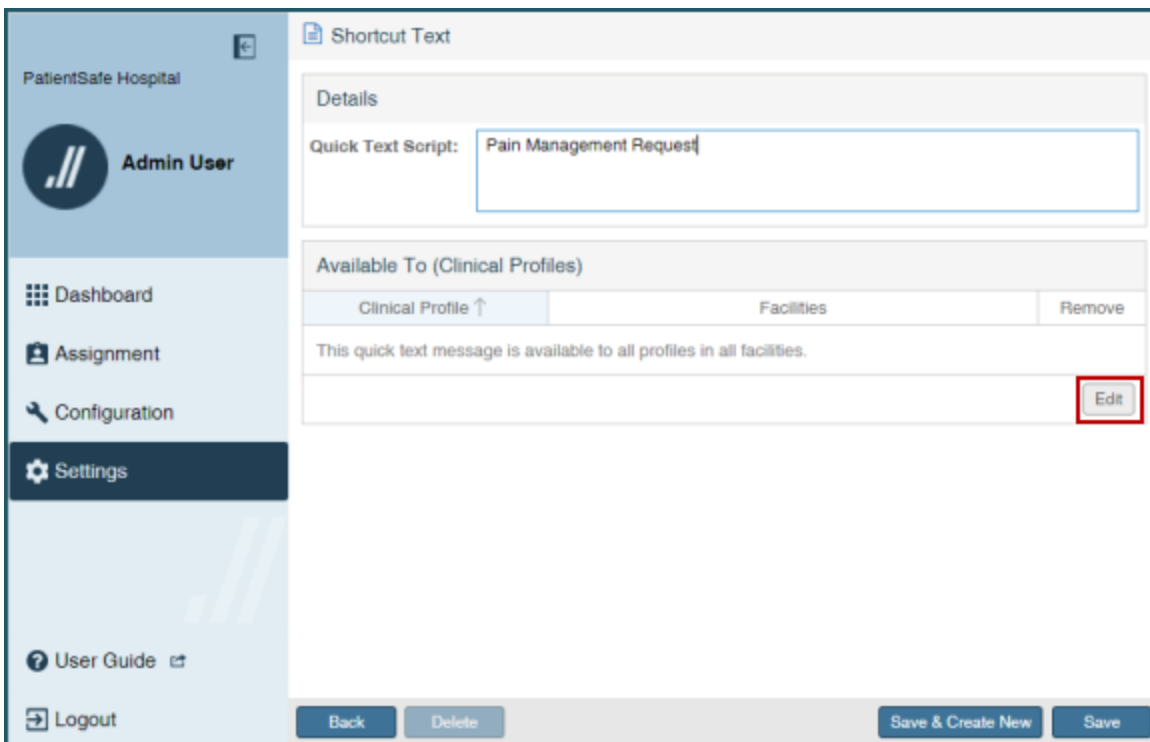
- To access shortcut messages for the Communications module, navigate to the tool bar on the left hand side and click Settings. Then, under Communications select **Quick Texts**.



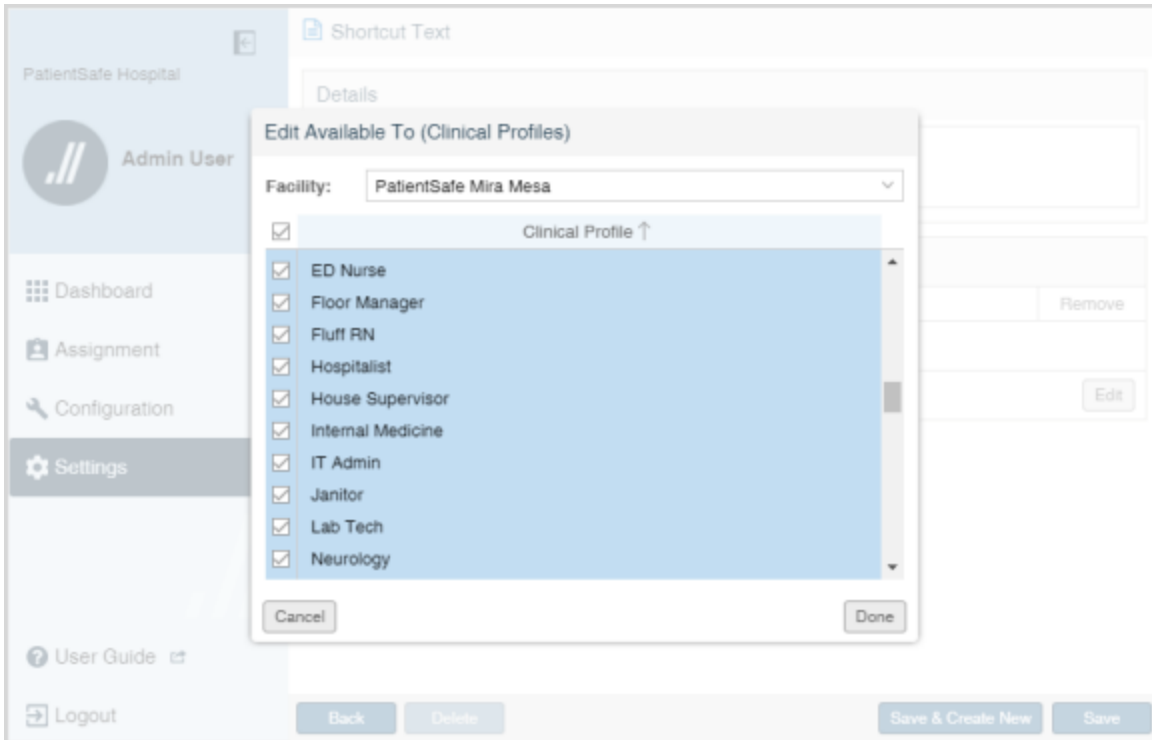
A list of quick text or shortcut messages displays for both the handheld and for SMS paging.



2. Click **Create New** to add a new message.
3. Enter the brief message in the Quick Text Script field.



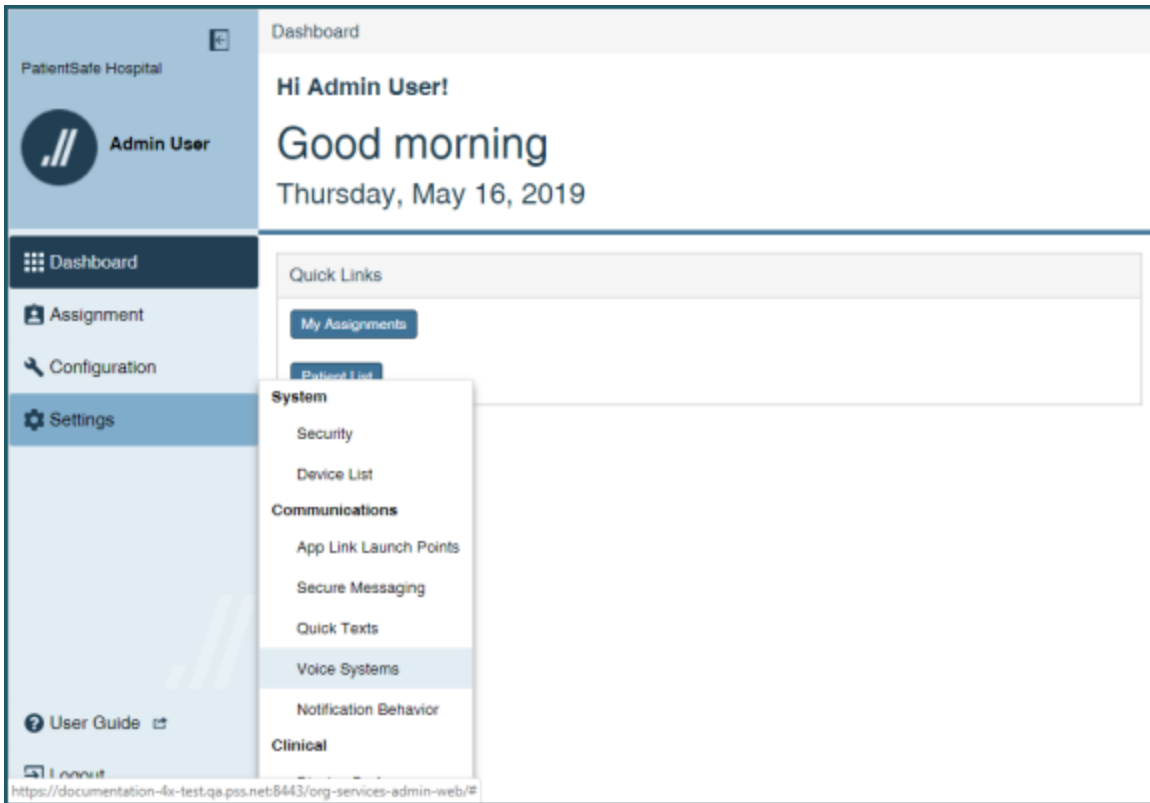
4. Click **Edit** to add the message to the necessary clinical profiles.
5. Select (Deselect) the Clinical Profiles for which you want to add the quick text.
6. Click **Done** when you are finished.



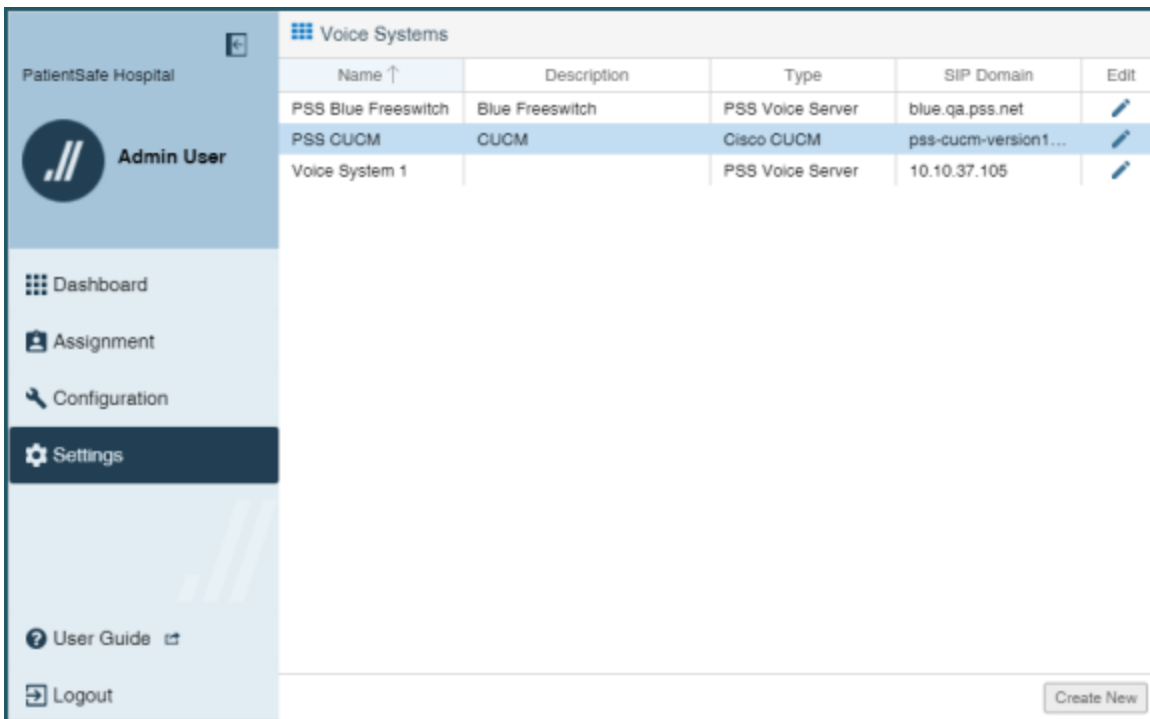
7. Click **Save** to save your message.
8. Click **Save & Create New** to save this message and enter another one.

Voice Systems

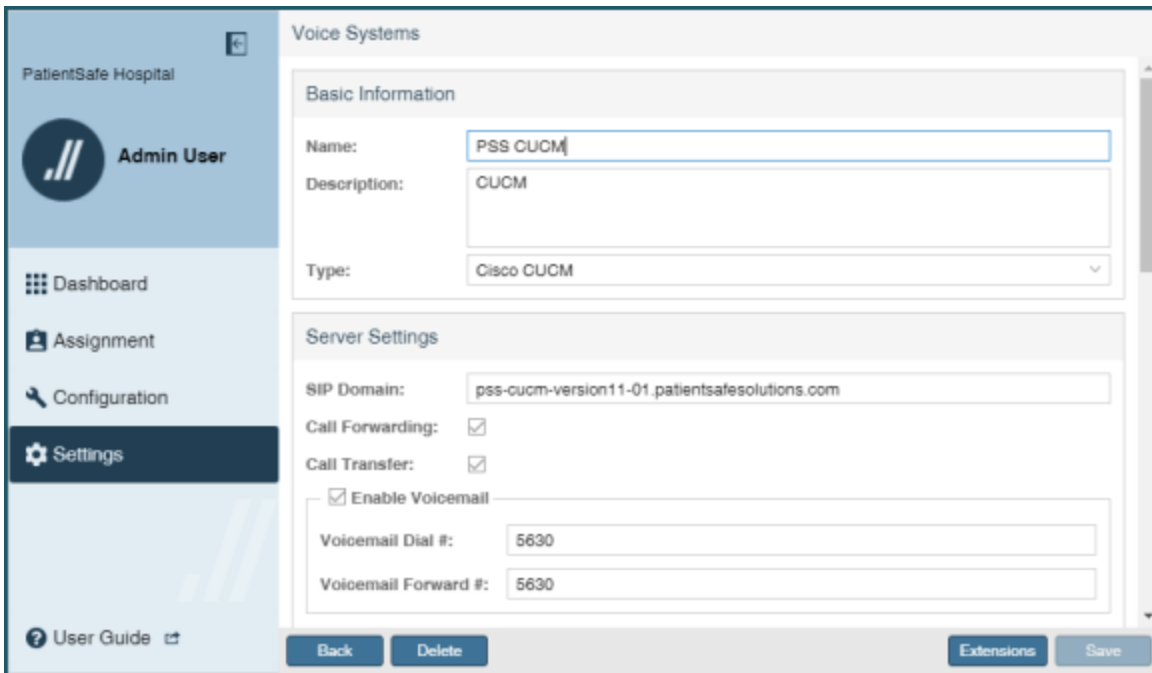
1. To set up the voice settings for the Communications module, navigate to the tool bar on the left hand side and click Settings. Then, under Communications select Voice Systems.



2. Select a voice system, i.e. PSS CUCM.



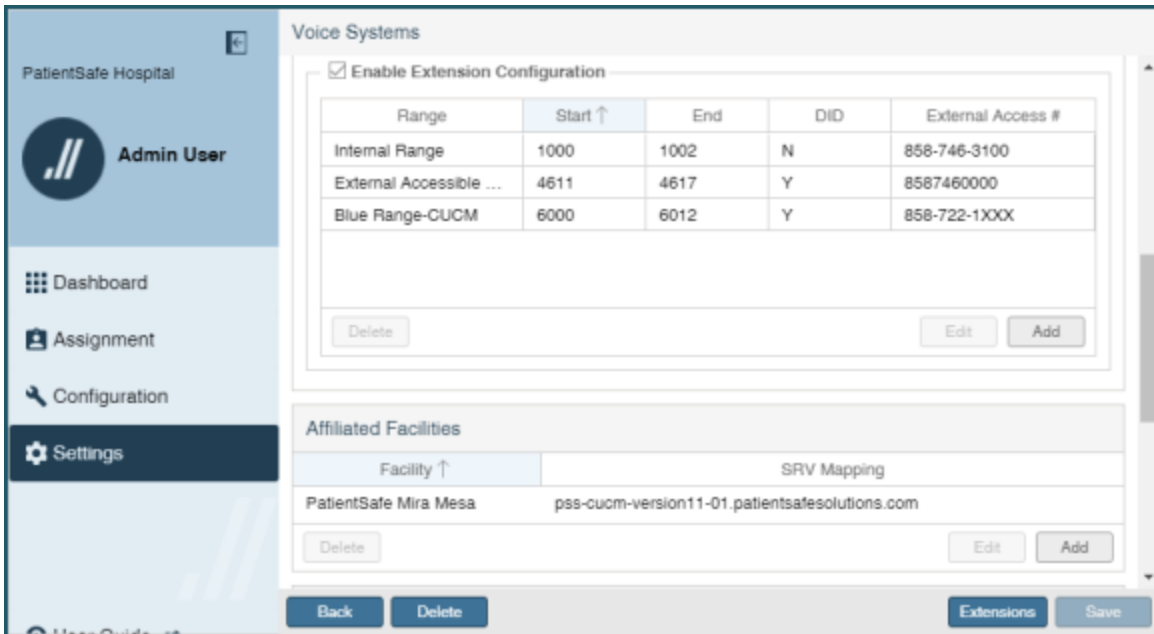
- The Basic Information table displays. Use the table below to complete these fields.



Name	Enter a name for the voice system.
Description	Enter a description for the voice system.
Type	Select either Cisco CUCM or PSS Voice Server.
SIP Domain	Enter the IP address of the SIP Domain.
Call Forwarding	Enable or disable Call Forwarding.
Call Transfer	Enable or disable Call Transfer.
Enable Voicemail	Enable voicemail to be used on this server. When enabled, the two fields below will display.
Voicemail Dial #	Enter the extension that will be dialed to retrieve voicemails when a user clicks the voice mail icon.
Voicemail Forward #	Enter the voicemail extension for which to forward calls.

System Administrators may want to add extension ranges.

- Click **Enable Extension Configuration**. When enabled, this allows extensions to be managed in PSS. When disabled, this allows extensions to be managed in Cisco CUCM.
- Click **Add**.



The Extension Range dialog box displays.

Extension Range

Range Name:

SIP Extension Range Start:

SIP Extension Range End:

DID Assigned:

External Access #:

Auto Assign to Profiles:

6. Use the table below to complete these fields.

- | | |
|---------------------------|--|
| Range Name | Enter a name for the extension range. |
| SIP Extension Range Start | Enter the first number included in the extension range. |
| SIP Extension Range End | Enter the last number included in the extension range. |
| DID Assigned | Direct Inward Dial - Click this check box if you want the extensions in this range to also be accessible outside of the facility via the full 10 digit number. |

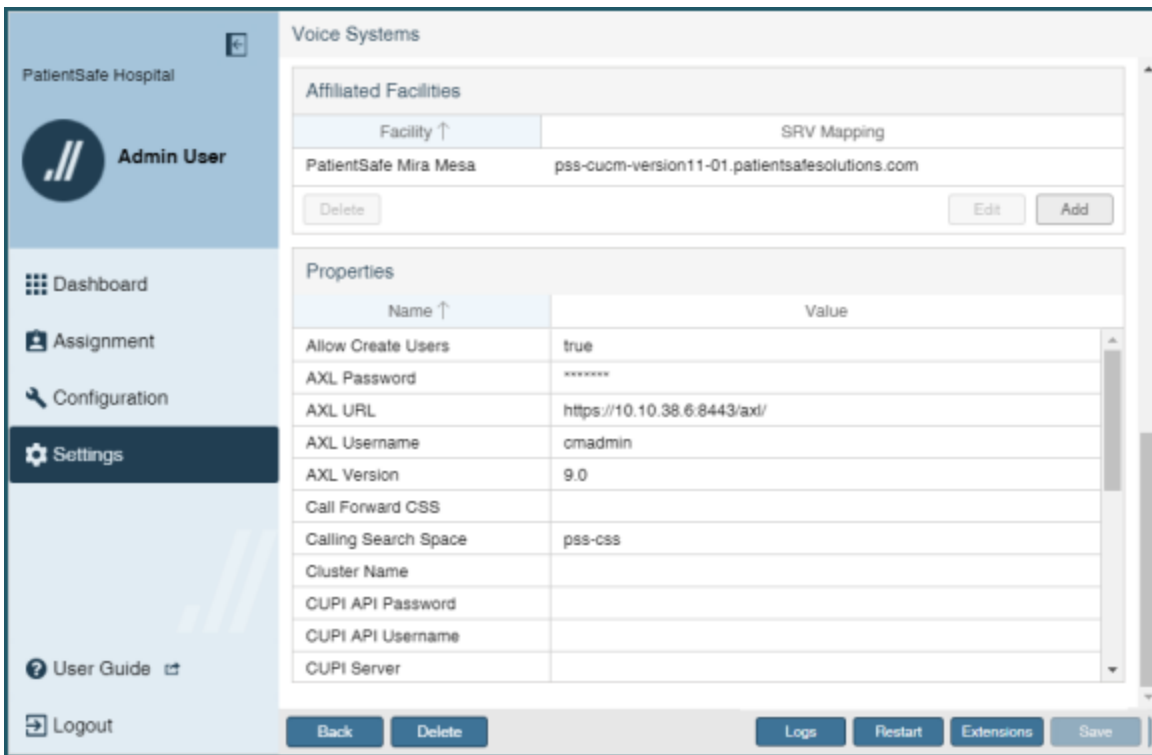
- External Access #** If you selected DID Assigned, the External Access # includes the 6 digit template number for external numbers followed by 4 zeros or 4 X's.

 If you did not select DID Assigned, the External Access # includes the full 10 digit template number for external numbers.
- Auto Assign to Profiles** The PatientTouch System will automatically assign an extension number to users who don't have one. Once the user logs into PatientTouch, he/she will automatically be assigned an extension from the selected range, based on availability. The Auto Assign to Profiles drop down menu allows IT personnel to select the clinical profiles to be automatically assigned from the extension range.

7. Click **OK**.
8. Add any **Affiliated Facilities**.
9. To complete the Properties section, use the table below to complete these fields.

Properties:

- CUCM ■ Refer to the CUCM Setup instructions on the Contents tab to the left.
- PSS Voice Server ■ Enter the server URL, SIP password, and SIP port.

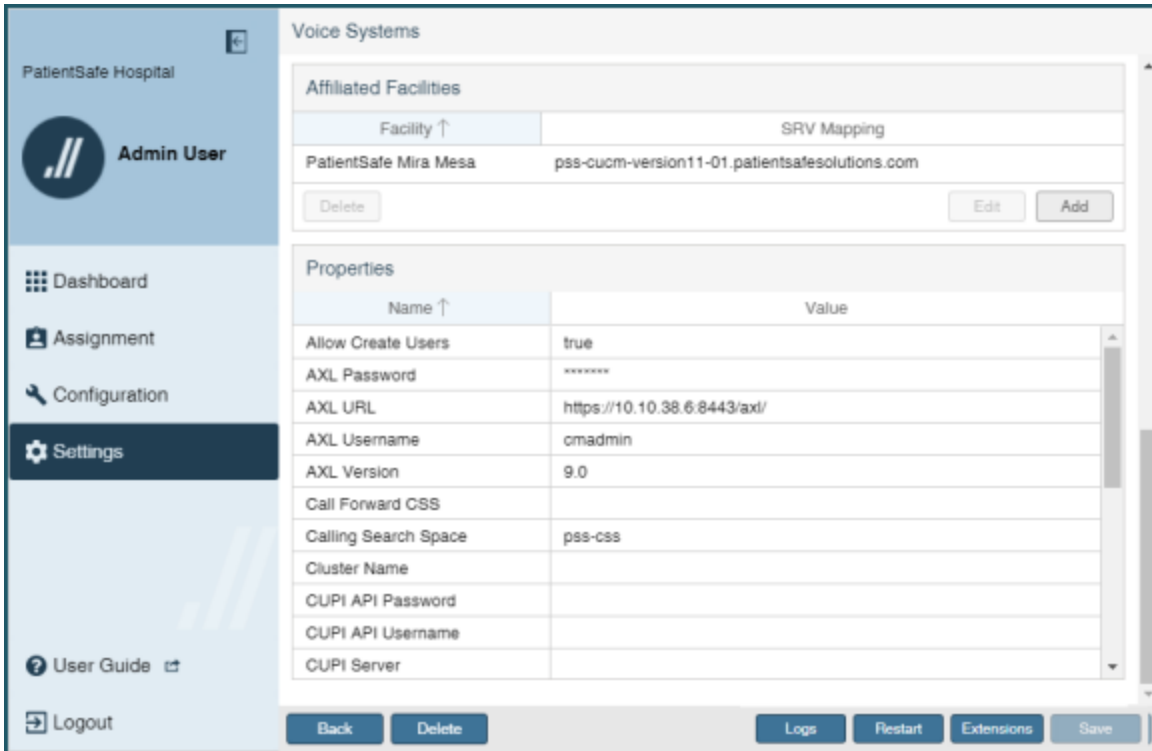


10. Click **Save**.
11. Click **Extensions** to view assigned extensions. Click the **Extensions** topic on the left to learn more.

12. Click **Restart** to restart voice system integration. This might be useful when configurations have changed.
13. Click **Logs** to view voice system logs.

Extensions

Use the **Extensions** button to update the extensions on the voice server.



Voice Systems

PatientSafe Hospital

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Affiliated Facilities

Facility ↑	SRV Mapping
PatientSafe Mira Mesa	pss-cucm-version11-01.patientsafesolutions.com

Delete Edit Add

Properties

Name ↑	Value
Allow Create Users	true
AXL Password	*****
AXL URL	https://10.10.38.6:8443/axl/
AXL Username	cmadmin
AXL Version	9.0
Call Forward CSS	
Calling Search Space	pss-css
Cluster Name	
CUPi API Password	
CUPi API Username	
CUPi Server	

Back Delete Logs Restart Extensions Save

The Extension functionality works similarly on CUCM and the PSS Voice Server.

1. Click **Extensions**.

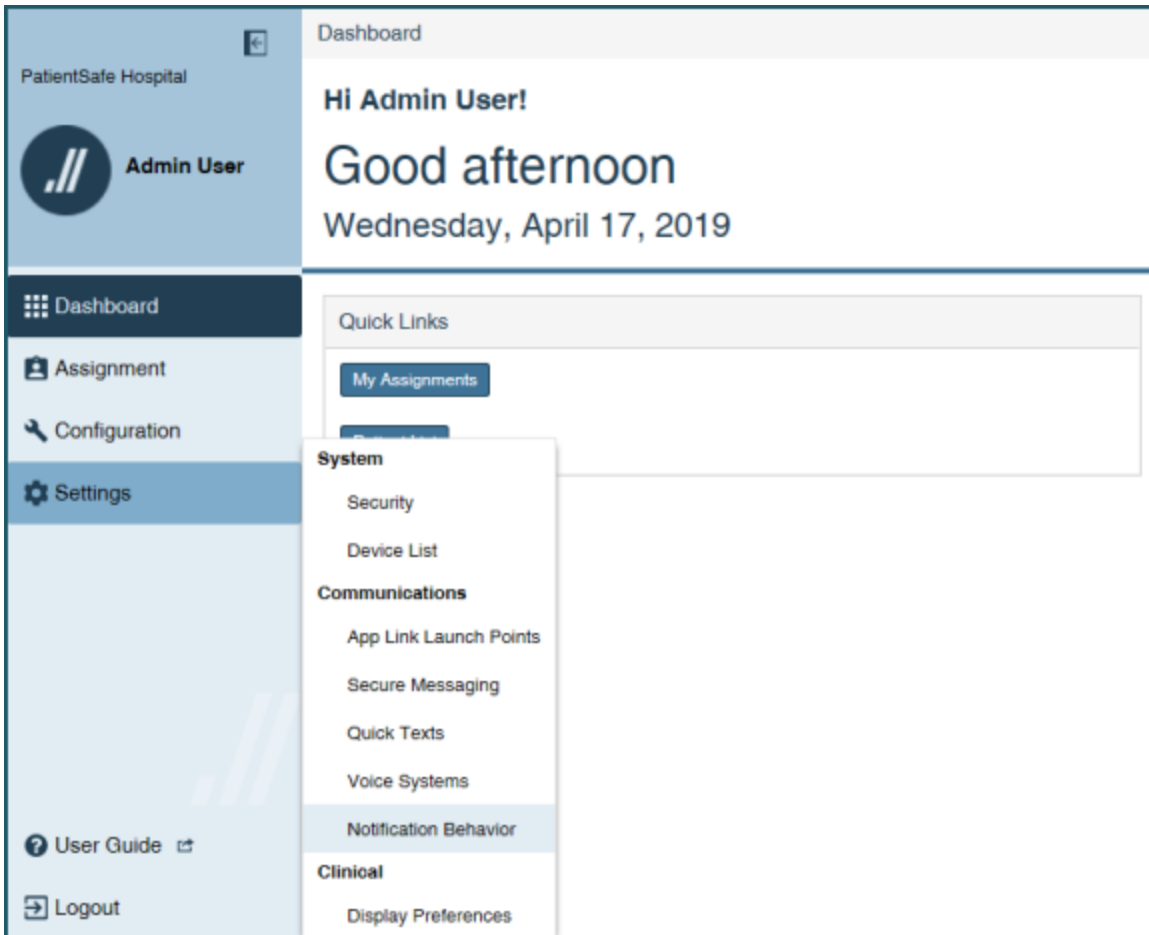
Name	Login Name	PatientTouch Extension ↑	PBX Extension
Jackie Nurse	nurse1		4444
3E: Phlebotomist			3314
1E: Laboratory			3315
Judy Cartwright	jcartwright		8000
Nancy Cena	ncena		8001
Jay Arundell	jarundell	1000	1000
Abercrombie	rabercrombie	1001	
Kelly Airbus	kairbus	1002	1002
Baker	out	1003	

- Click **Select All** to select all extensions in the list.
- Select the appropriate button:
 - **Update PatientTouch:** Updates the patient touch extensions assigned to caregivers in the Enterprise Manager, with the extensions PSS has detected are assigned to the caregiver in the PBX. For example, in CUCM you can setup the extensions manually which allows PSS to import those extensions.
 - **Update PBX:** Click this button to send the selected extensions to the PBX so that the PBX matches the extension assigned in the Enterprise Manager. This may be useful if the caregiver assigned extension was recently changed / deleted on the PBX and you want to recreate it.
 - **Update All PBX:** Click this button to send all extensions to the PBX so that the PBX matches the extension assigned in the Enterprise Manager.

Notification Behavior

Use this section to set the behavior for text messages, notification messages, reminders, and voice calls on the handheld. You can also enable or disable Inbox Reminders.

- From the Dashboard, click Settings>Notification Behavior.



Text Messages

2. Set High, Medium, and Low priority text message behavior by selecting vibrate, play an auditory sound, or display a popup.

Notification Behavior

Text Messages

High Priority Messages

Vibration: Vibrate Long Vibrate ▾

Sounds: Play Sound Double Chime ▾

Popup: Display Popup

Medium Priority Messages

Vibration: Vibrate Short Vibrate ▾

Sounds: Play Sound Single Chime ▾

Popup: Display Popup

Low Priority Messages

Vibration: Vibrate Short Vibrate ▾

Sounds: Play Sound

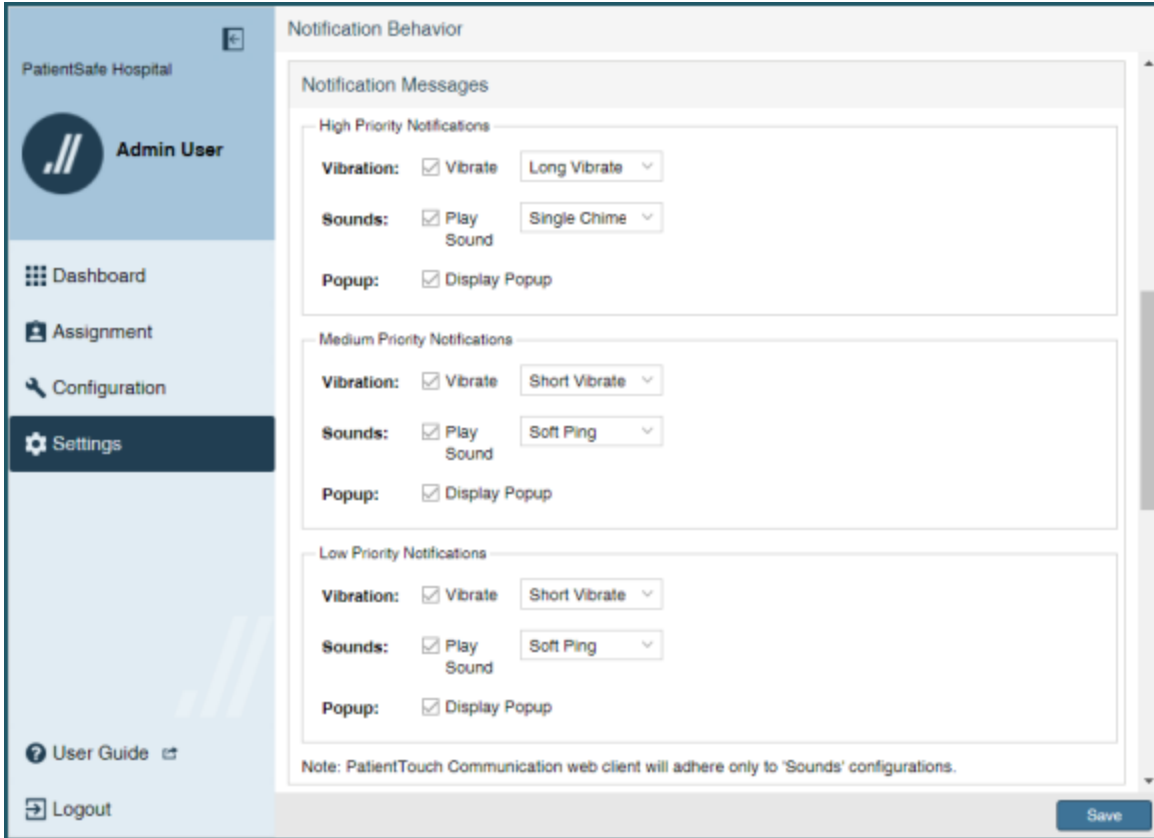
Popup: Display Popup

Note: PatientTouch Communication web client will adhere only to 'Sounds' configurations.

Save

Notification Messages

3. Set High, Medium, and Low priority notification message behavior by selecting vibrate, play an auditory sound, or display a popup.

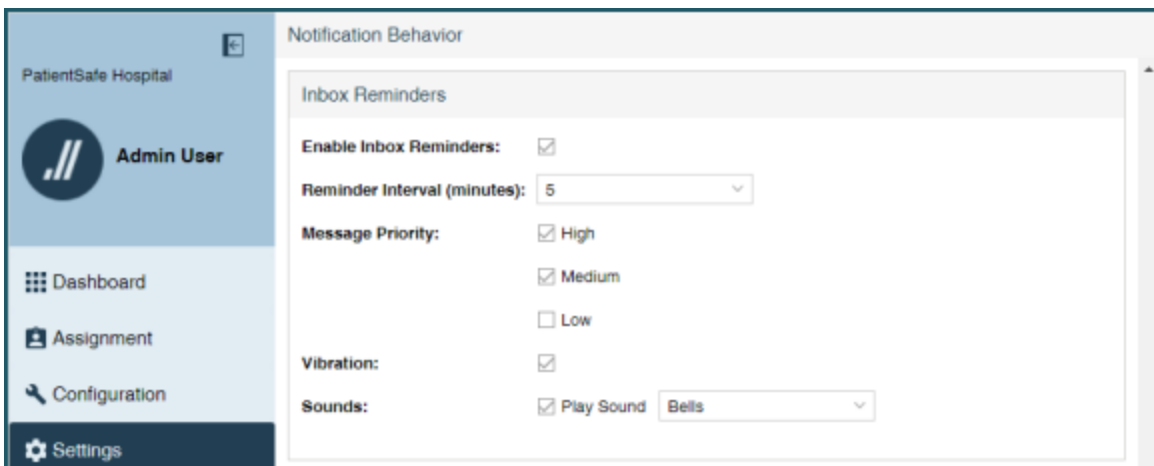


Enable Inbox Reminders

Enable Inbox Reminders: Check this box to enable PatientTouch Communications for iOS, Android, and Web Messenger to receive Inbox Reminders. When enabled here, users will have the ability to disable Inbox Reminders on their handheld device.

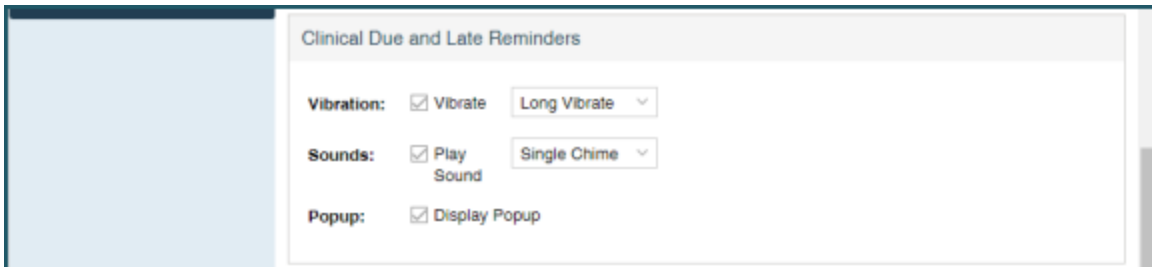
Reminder Interval Minutes: Enter the number of minutes after which users will receive an Inbox Reminder notification.

Message Priority: For High, Medium, and Low Priority Inbox Reminders, you can customize behavior to vibrate or play an auditory sound



Clinical Due and Late Reminders

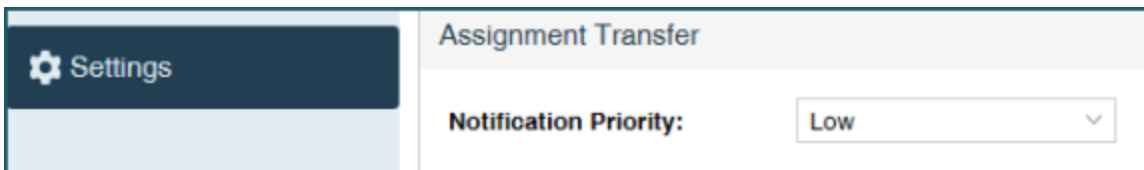
For due and late reminders on the clinical application, set notification behavior by selecting vibrate, play an auditory sound, or display a popup.



The screenshot shows a settings panel titled "Clinical Due and Late Reminders". It contains three sections: "Vibration:" with a checked checkbox for "Vibrate" and a dropdown menu set to "Long Vibrate"; "Sounds:" with a checked checkbox for "Play Sound" and a dropdown menu set to "Single Chime"; and "Popup:" with a checked checkbox for "Display Popup".

Assignment Transfer

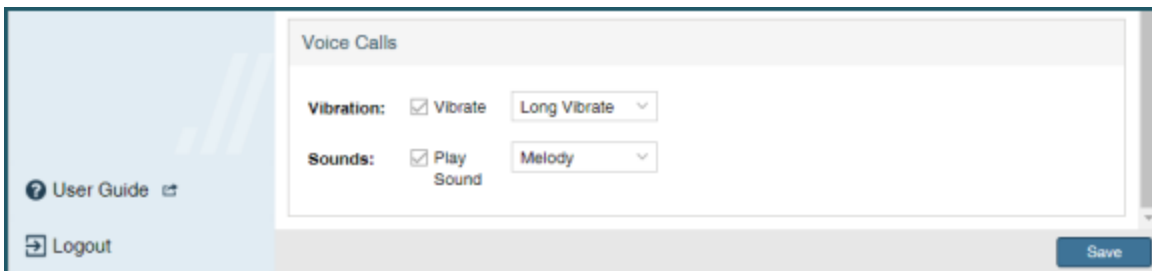
The Assignment Transfer drop down menu allows administrators to select Low, Medium, or High for assignment transfer email messages.



The screenshot shows a settings panel titled "Assignment Transfer". On the left is a "Settings" button with a gear icon. The main area has a "Notification Priority:" label and a dropdown menu currently set to "Low".

Voice Calls

For voice calls, set voice call behavior by selecting vibrate or play an auditory sound.



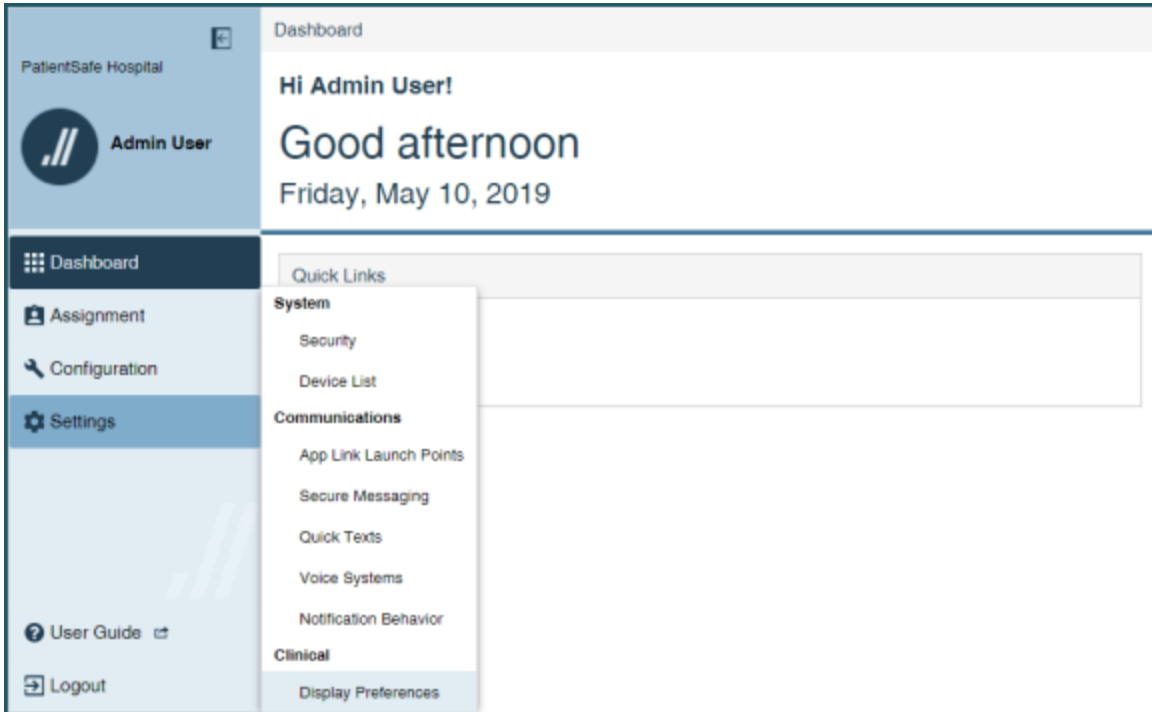
The screenshot shows a settings panel titled "Voice Calls". On the left is a sidebar with "User Guide" and "Logout" links. The main area has two sections: "Vibration:" with a checked checkbox for "Vibrate" and a dropdown menu set to "Long Vibrate"; and "Sounds:" with a checked checkbox for "Play Sound" and a dropdown menu set to "Melody". A "Save" button is located at the bottom right.

Clinical

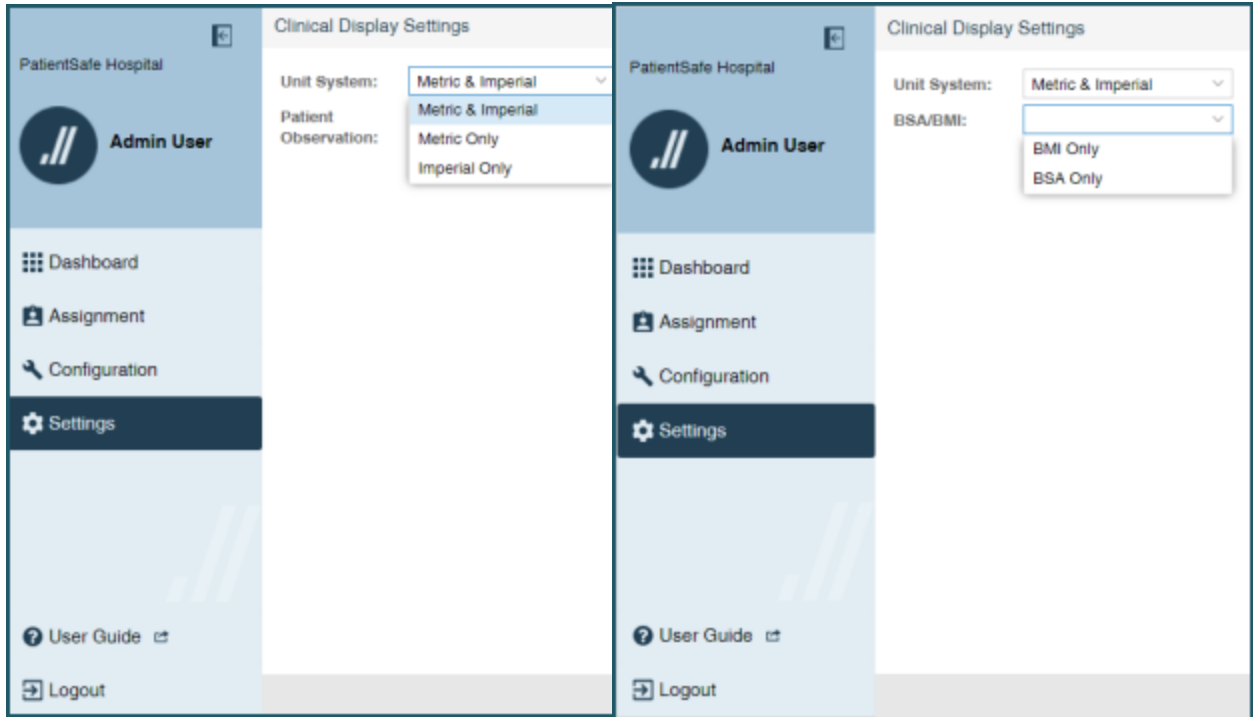
Display Preferences

Hospitals can choose whether to display Body Surface Area (BSA) or Body Mass Index (BMI) on the patient info screen of the handheld, Web Messenger, MAR, Clinical Manager, and Enterprise Manager. In addition, facilities can choose to display a patient's height and weight in metric, imperial, or both units in these same locations.

1. To configure these settings, click [Settings>Clinical> Display Preferences](#).



2. For the Unit System: select Metric & Imperial, Metric Only, or Imperial Only.
3. For the BSA/BMI: select BMI Only or BSA Only.
4. Click [Save](#).



PatientTouch® Communications Set-up Guide for Cisco Unified Call Manager (CUCM)

The purpose of this document is to provide the step-by-step instructions on how to configure Cisco Unified Call Manager (CUCM) for integration with PatientTouch Communications. The target audience for this document is CUCM administrators/technicians.

To setup the CUCM, you will need to follow all of the instructions listed below. Click a link to access a topic or use your mouse to scroll through the pages.

[Login to CUCM and Enable AXL](#)

[CUCM Settings](#)

[Device Pool](#)

[SIP Security Profile](#)

[SIP Profile](#)

[Call History](#)

[Create New Voice Settings in Enterprise Manager](#)

[Appendix](#)

Overview

The PatientTouch App for iOS can register with Cisco Unified Call Manager (CUCM) for making voice calls. The PatientTouch app connects to CUCM using the SIP protocol. Users can be assigned extensions in the Enterprise Manager web app, or via LDAP using Org Services integration.

Org Services uses AXL (Cisco's Administrative XML Rest Interface for CUCM) to provision devices and extensions for each user in CUCM.

PatientTouch communicates with Org Services, an internal PatientTouch service. Org Services then communicates with Active Directory (AD) and CUCM to manage user extensions.

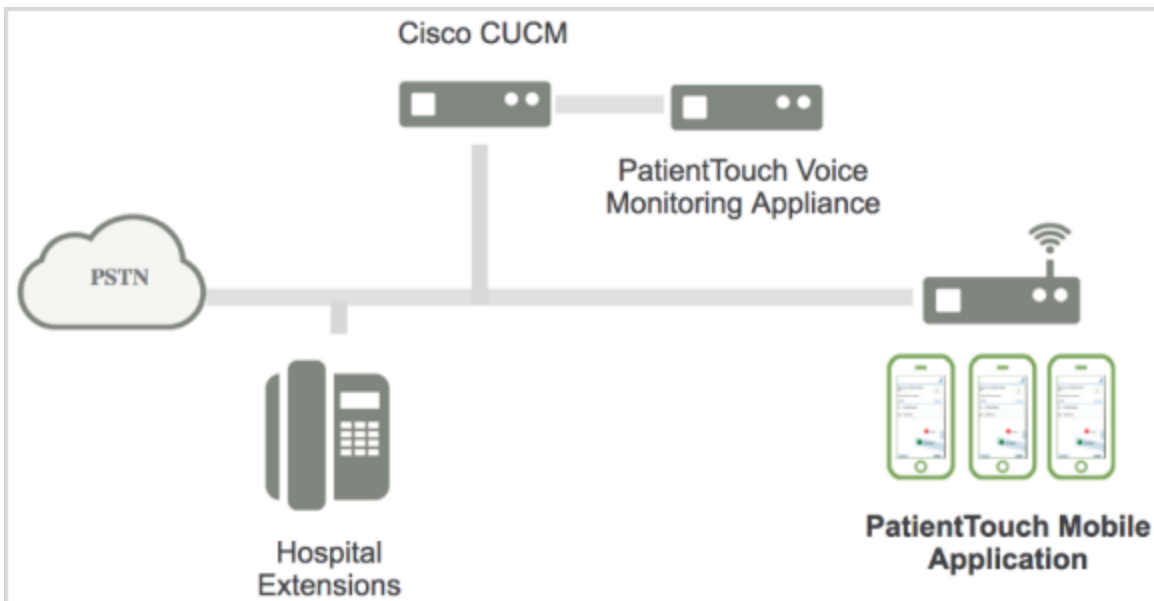
There are two ways that extensions can sync between PatientTouch and CUCM. This is dependent on whether or not the organization has enabled AD Sync.

If the organization has AD Sync enabled, extensions will sync periodically, as configured, and update the user profile in PatientTouch.

If the organization does not have AD sync enabled, when the user logs into a Patient Touch handheld with AD credentials, Org Services will query AD for user profile and extension information. Org Services will then send an AXL request to CUCM to provision a device and extension directory number (DN).

Similarly, when an extension is assigned via Enterprise Manager, Org Services will provision device and extension information in CUCM on login.

This allows Patient Touch devices to connect automatically to CUCM as SIP devices.



Requirements

- Cisco Unified Call Manager 9.1 or greater.
- A Cisco license for each PatientTouch device that will connect to the network is required. PSS devices connect to CUCM as a "3rd Party Basic SIP" device. If your licenses are of the type "User Connect Licensing", each device will require one "Enhanced" license. If your licenses are of the type "Unified Workspace Licensing", you may utilize either a "Standard" or "Professional" license.

DNS Setup

The PatientTouch handheld app uses SRV records to locate CUCM subscribers to connect to. A domain is configured in the app and the app will query VOIP SRV records for this domain. Here is an example SRV setup for the 'test.pss.net' domain:

```
_pssvoip._udp.test.pss.net 0 0 5060 cucm.node1.pss.net  
_pssvoip._udp.test.pss.net 0 0 5060 cucm.node2.pss.net  
_pssvoip._udp.test.pss.net 0 0 5060 cucm.node3.pss.net
```

The PatientTouch app will round robin between the SRV records until a connection can be made. The CUCM subscribers can also be given a priority in the SRV. The PatientTouch app will try subscribers with a priority of '0' first, then '1', '2', etc. Load balancing can be achieved by adding multiple servers at the same priority.

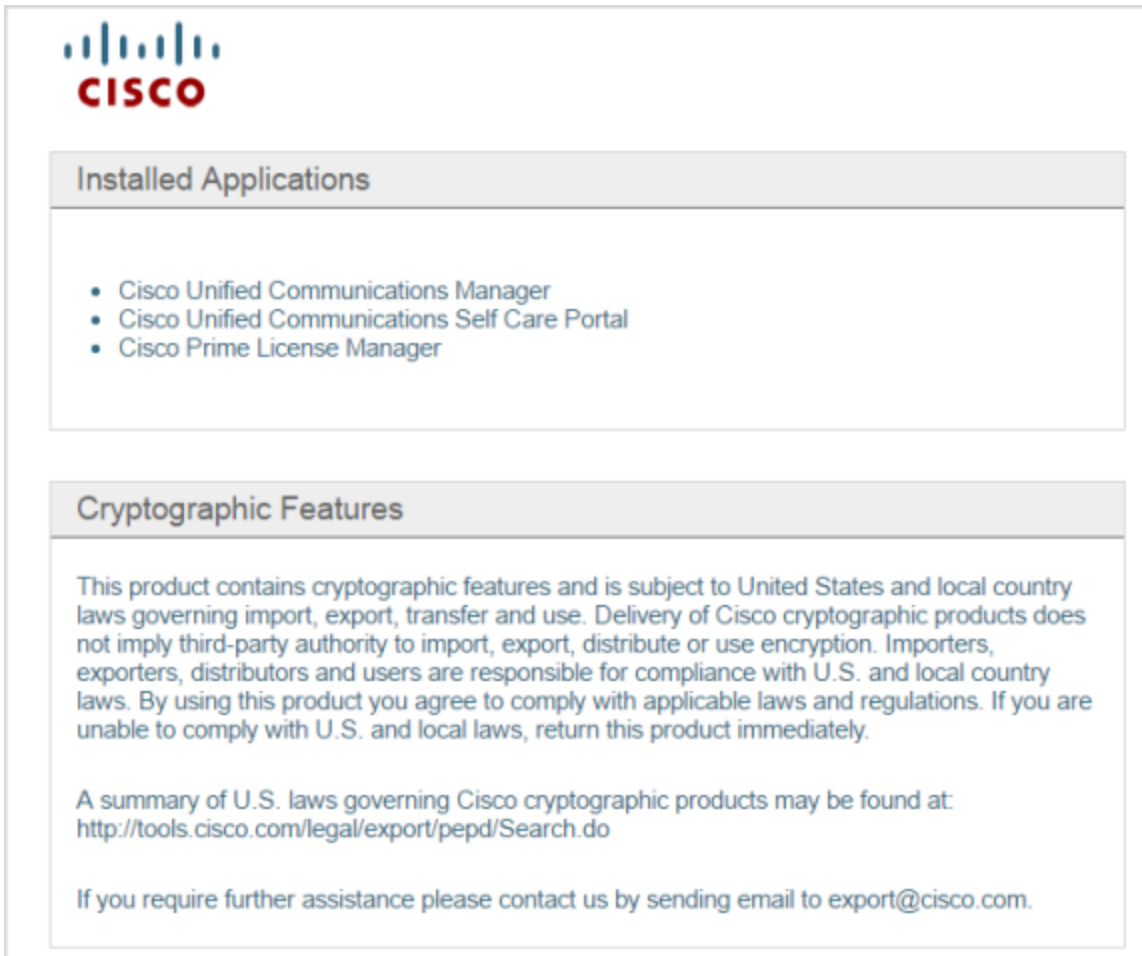
CUCM Setup

The following CUCM configuration will be required (detailed in later sections):

- AXL Service Enabled (Cisco's Administrative XML REST interface for CUCM)
 - A valid AXL user account is required, to allow Org Services to provision PatientTouch devices.
- A new 'SIP Profile' for making changes specific to PatientTouch devices.
- A new 'Device Pool' for easy management and tracking of PatientTouch devices.
- (Optional) A new Calling Search space for managing how calls are routed from patient touch devices.
- A 'Route Partition' for sectioning off PatientTouch extensions. Only numbers and devices assigned to numbers in this partition will be modified by PatientTouch.
- A new SIP Security Profile for making SIP security changes specific to PatientTouch devices.
- Enable CDR reporting so PatientTouch devices can get call history, even for calls made while the device is offline.
 - Add PatientTouch servers ip (VIP) as a CDR Billing Application Server

Login to CUCM

1. Click Cisco Unified Communications Manager.



2. Enter your Username and Password.
3. Click **Login**.



The screenshot shows the Cisco Unified CM Administration login interface. At the top left is the Cisco logo and the text "Cisco Unified CM Administration For Cisco Unified Communications Solutions". At the top right is a navigation menu with "Cisco Unified CM Administration" and a "Go" button. The main content area features a large blue header with "Cisco Unified CM Administration" and a login form with "Username" and "Password" fields, "Login" and "Reset" buttons, and a background image of server racks. Below the login form is a copyright notice and several paragraphs of legal disclaimers and links to external resources.

Cisco Unified CM Administration
For Cisco Unified Communications Solutions

Navigation Cisco Unified CM Administration Go

Username

Password

Login Reset

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This product contains cryptographic features and is subject to United States and local country laws governing import, export, transfer and use. Delivery of Cisco cryptographic products does not imply third-party authority to import, export, distribute or use encryption. Importers, exporters, distributors and users are responsible for compliance with U.S. and local country laws. By using this product you agree to comply with applicable laws and regulations. If you are unable to comply with U.S. and local laws, return this product immediately.

A summary of U.S. laws governing Cisco cryptographic products may be found at our [Export Compliance Product Report](#) web site.

For information about Cisco Unified Communications Manager please visit our [Unified Communications System Documentation](#) web site.

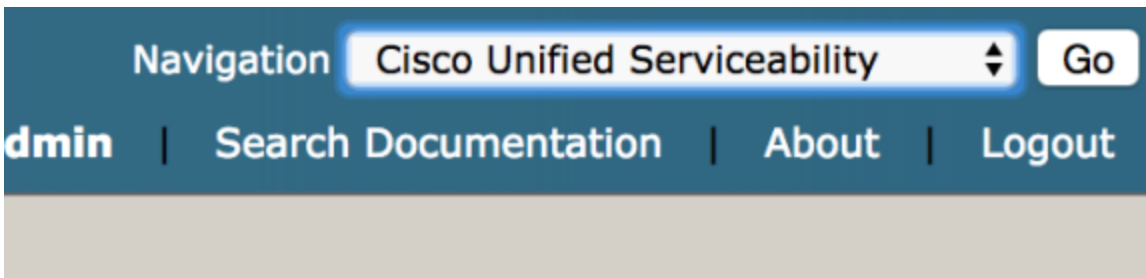
For Cisco Technical Support please visit our [Technical Support](#) web site.

Enable AXL on CUCM

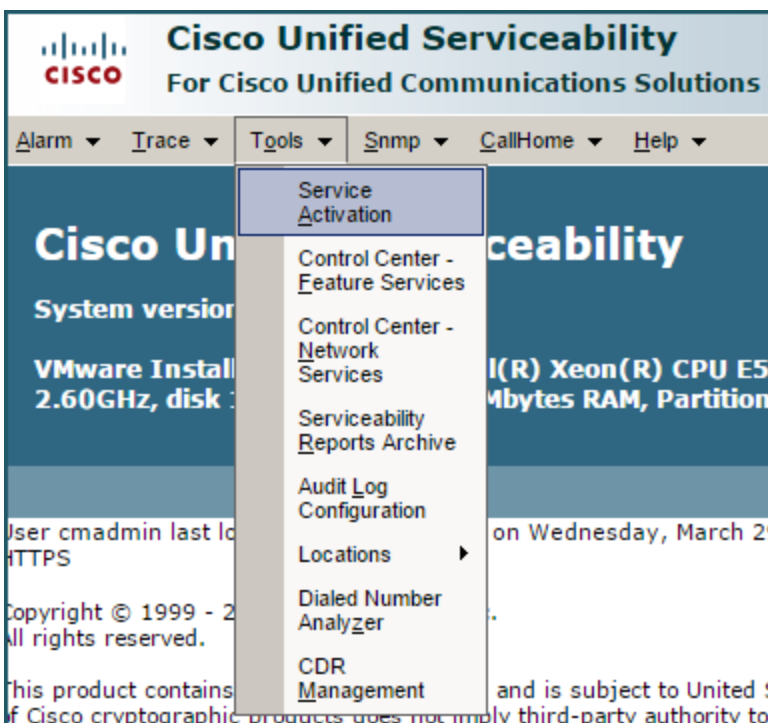
Org Services uses AXL to connect to CUCM and manage the per device SIP settings.

Enable AXL service in Service Availability:

1. In the Navigation drop down menu on the top right of the screen, select Cisco Unified Serviceability.
2. Click **Go**.



3. Select Tools>Service Activation to view the list of enabled services.



4. Select the Cisco AXL Web Service check box.
5. Click **Apply**.

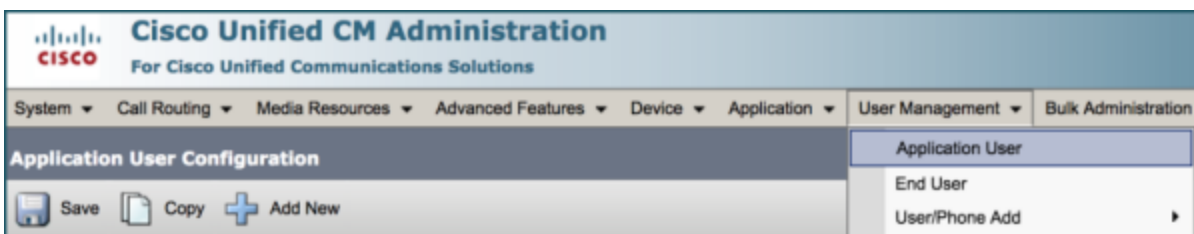
Database and Admin Services		
	Service Name	Activation Status
<input type="checkbox"/>	Cisco Bulk Provisioning Service	Deactivated
<input checked="" type="checkbox"/>	Cisco AXL Web Service	Activated
<input type="checkbox"/>	Cisco UXL Web Service	Deactivated
<input type="checkbox"/>	Cisco TAPS Service	Deactivated

Next you will need to add an Application User to allow PatientTouch Cucm-Sync to communicate (over AXL) to CUCM. This username and password will be entered in Enterprise Mgr later.

- Go back to the Cisco Unified CM Administration using the drop down menu located on the top right of the screen.

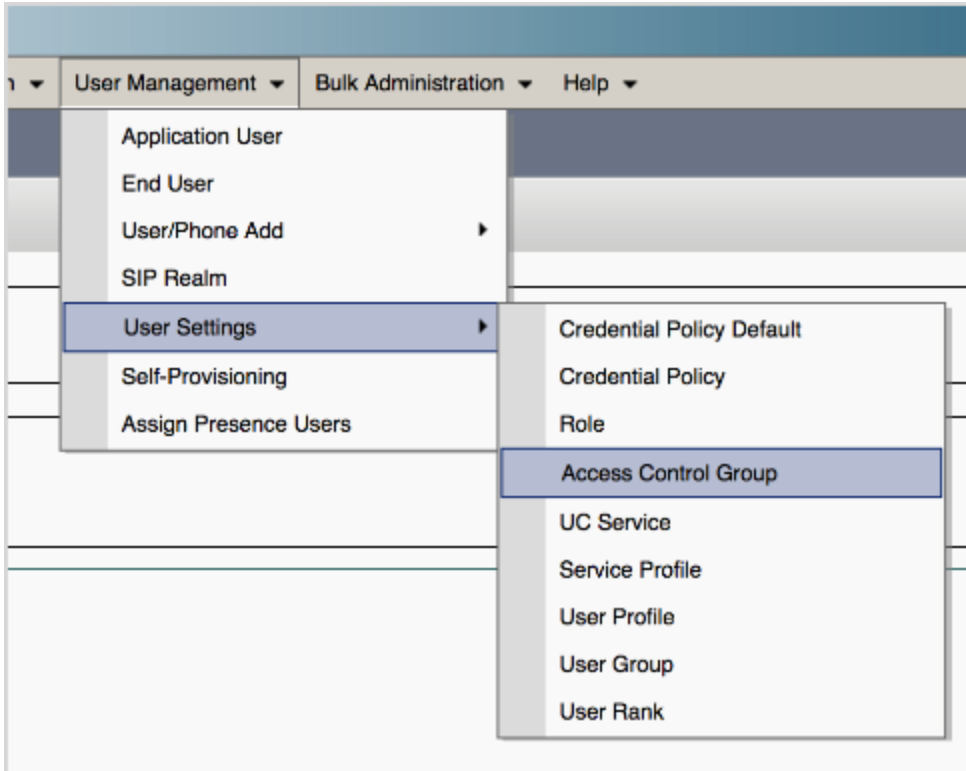
Make sure to click **Go**.

- Select User Management>Application User.

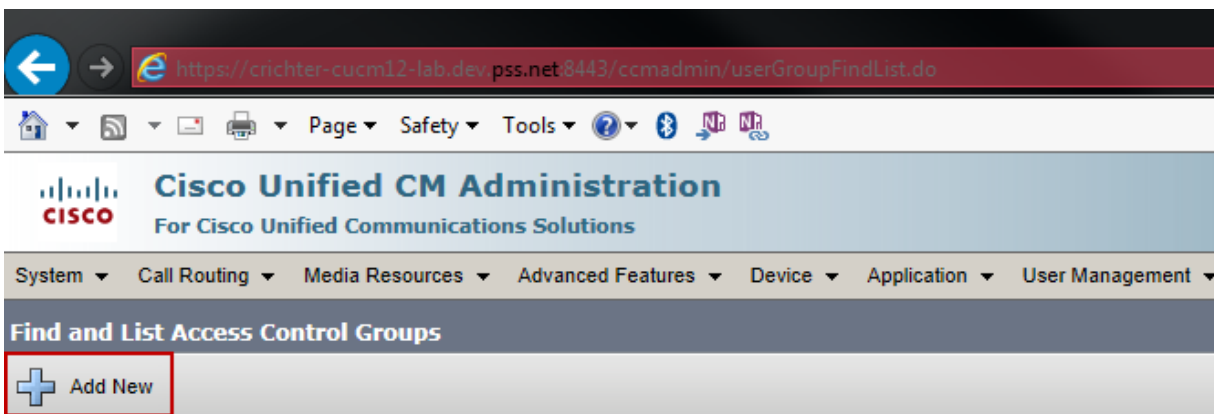


- Add the 'Standard AXL API Access' Role to the user. Roles are granted to CUCM Users by adding 'Access Control Groups'. See below for how to create a more restrictive Access Control Group.
- A more restrictive Access Control Group for PatientTouch can be created and added to the Application User. Create a new 'Access Control Group':

- Click **User Management>User Settings>Access Control Group**




- Click **Add New**




- Enter the Access Control Group Name

- Click **Save**


**Cisco Unified CM Administration**
For Cisco Unified Communications Solutions

System ▾ Call Routing ▾ Media Resources ▾ Advanced Features ▾ Device ▾ Application ▾

Access Control Group Configuration

 Save


Status

 Status: Ready

Access Control Group Information

Name*

Available for Users with User Rank as* ▾

 *- indicates required item.

- Select Assign Role to Access Control Group from the drop down menu on the top right of the screen.
- Click Go

The screenshot shows the Cisco Unified CM Administration interface. At the top, there is a navigation bar with the Cisco logo and the text "Cisco Unified CM Administration For Cisco Unified Communications Solutions". To the right, there is a "Navigation" dropdown menu set to "Cisco Unified CM Administration" and a "Go" button. Below this, there are links for "cadmin", "Search Documentation", "About", and "Logout". A main menu bar contains various categories like "System", "Call Routing", "Media Resources", "Advanced Features", "Device", "Application", "User Management", and "Bulk Administration".

The main content area is titled "Access Control Group Configuration". A red box highlights a "Related Links" section containing a dropdown menu with "Assign Role to Access Control Group" selected and a "Go" button. Below this, there are action buttons: "Save", "Delete", "Copy", and "Add New".


The "Status" section shows a message: "Add successful".

The "Access Control Group Information" section contains a "Name" field with the value "PatientTouch Groups 1" and an "Available for Users with User Rank as" dropdown menu set to "1 - Default User Rank".

The "User" section has a "Rows per Page" dropdown set to "50". Below it is a search area with "Find User where" dropdowns for "User ID" and "begins with", a search input field, and "Find" and "Clear Filter" buttons. A message below the search area reads: "No active query. Please enter your search criteria using the options above." Below the search area are buttons for "Add End Users to Group", "Add App Users to Group", "Select All", "Clear All", and "Delete Selected".


At the bottom, there are "Save", "Delete", "Copy", and "Add New" buttons. A footer note says: "i * - indicates required item".

- Click Assign Role to Group



Cisco Unified CM Administration
 For Cisco Unified Communications Solutions

System ▾ Call Routing ▾ Media Resources ▾ Advanced Features ▾ Device ▾ Application ▾ Us

Access Control Group Configuration

 Save

Status

 Status: Ready

Access Control Group Information

Name * PatientTouch Group 4

Role Assignment

Role

Assign Role to Group

Delete Role Assignment

Save

- When you click Assign Role to Group, the window below should display. However, you may need to click **Find** in order to see the list of roles.

- Click the following roles and then click **Add Selected**

- Standard AXL API Access
- Standard Admin Rep Tool Admin
- Standard Audit Log Administration
- Standard CCM Admin Users
- Standard CCM Admin Administration

Find and List Roles

Select All Clear All **Add Selected** Close

Status
i 50 records found

Role (1 - 50 of 50) Rows per Page 50

Find Role where Name begins with Find Clear Filter + -
 Select item or enter search text

<input type="checkbox"/>	Name ^	Application	Description	Copy
<input checked="" type="checkbox"/>	Standard AXL API Access	Cisco Call Manager AXL Database	Access the AXL APIs	
<input type="checkbox"/>	Standard AXL API Users		All users with access to AXL APIs	
<input type="checkbox"/>	Standard AXL Read Only API Access	Cisco Call Manager AXL Database Read Only	Access the AXL Read Only APIs	
<input checked="" type="checkbox"/>	Standard Admin Rep Tool Admin		Administer CAR	
<input checked="" type="checkbox"/>	Standard Audit Log Administration	Cisco Call Manager Serviceability	Serviceability Audit Log Administration	
<input checked="" type="checkbox"/>	Standard CCM Admin Users		All users with access to CCM web site	
<input type="checkbox"/>	Standard CCM End Users		Access to CCM User Option Pages	
<input type="checkbox"/>	Standard CCM Feature Management	Cisco Call Manager Administration	Standard CCM Feature Management	

Enter AXL Data in Enterprise Manager

Under Voice Systems, go to Properties and update the following properties:

1. Enter AXL Username and AXL Password for the user on the server you are setting up.
2. Enter AXL URL as the URL to the AXL API of the cluster: 'https://<cluster_hostname>:8443/axl/'. The host is normally just the 'SIP Server' one you entered above but can be any hostname that resolves to a server or multiple servers on the cluster.

Blue Hospital

User Admin

- Dashboard
- Assignment
- Configuration
- Settings**

Voice Systems

Affiliated Facilities

Facility ↑	DNS Mapping
No affiliated facilities	

Delete Edit Add

Properties

Name ↑	Value
AXL Password	
AXL URL	
AXL Username	
AXL Version	9.0
Call Forward CSS	
Calling Search Space	pss-css
Cluster Name	

Back Delete Fix Extensions Save

CUCM Settings

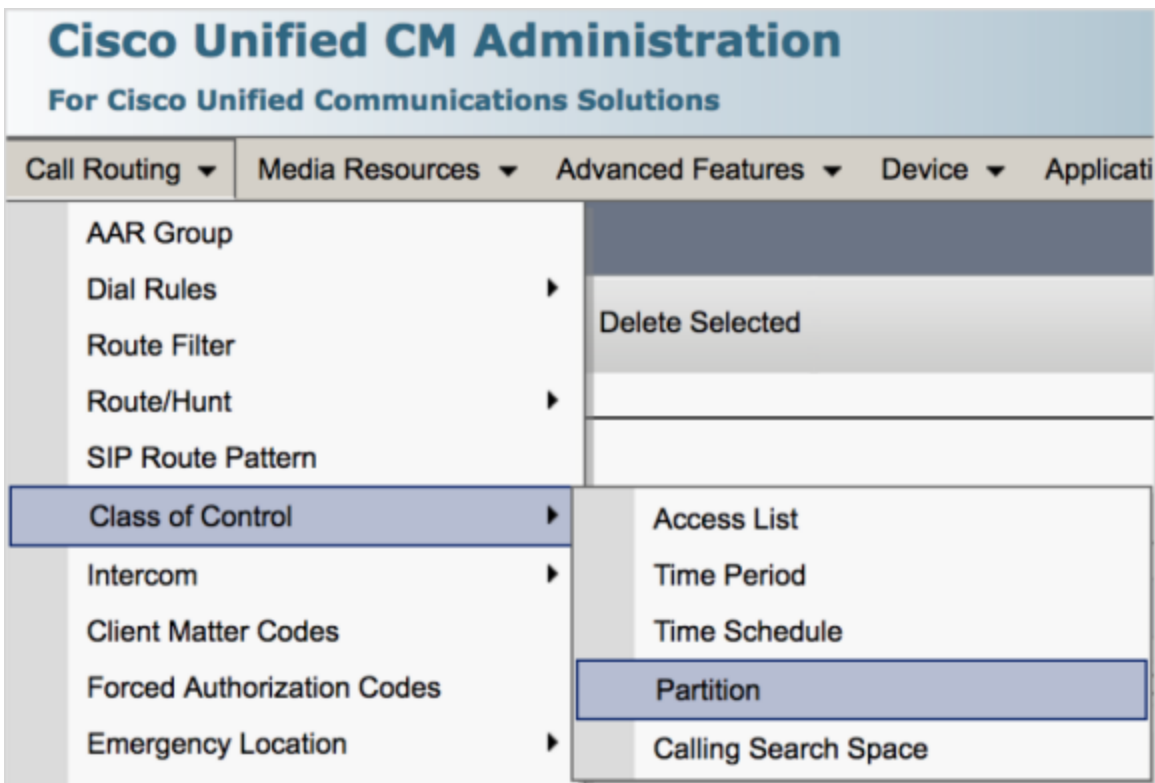
The following have to be configured on the CUCM server and the corresponding properties updated in Enterprise Manager> Voice Systems.

Route Partition & Calling Search Space

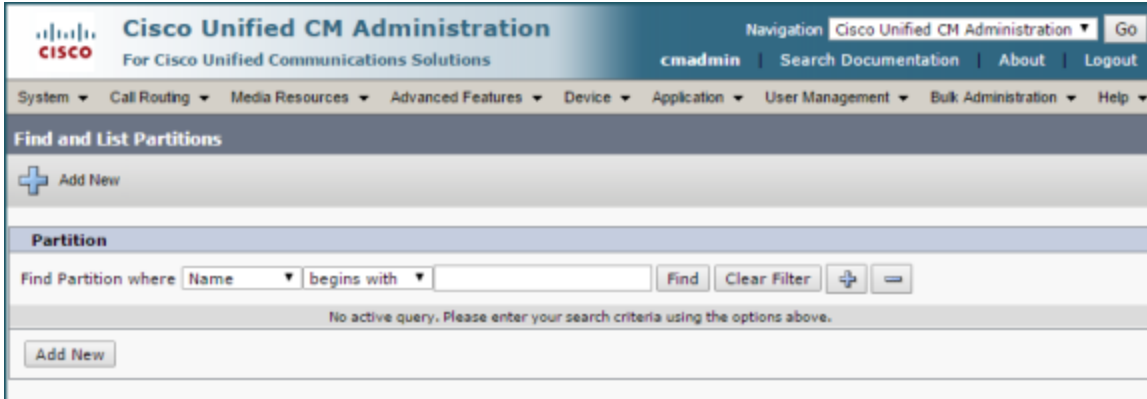
To enable custom call routing for PatientTouch devices, a new Route Partition and a new Calling Search Space specific to PSS devices are required. In addition to call routing, the Route Partition is also used to determine calls made by PatientTouch devices as part of the Call History feature.

Jot down the 'Route Partition' and 'Calling Search Space' names, these will need to be entered in Enterprise Mgr under the Voice System Properties.

1. Select Call Routing>Class of Control>Partition.

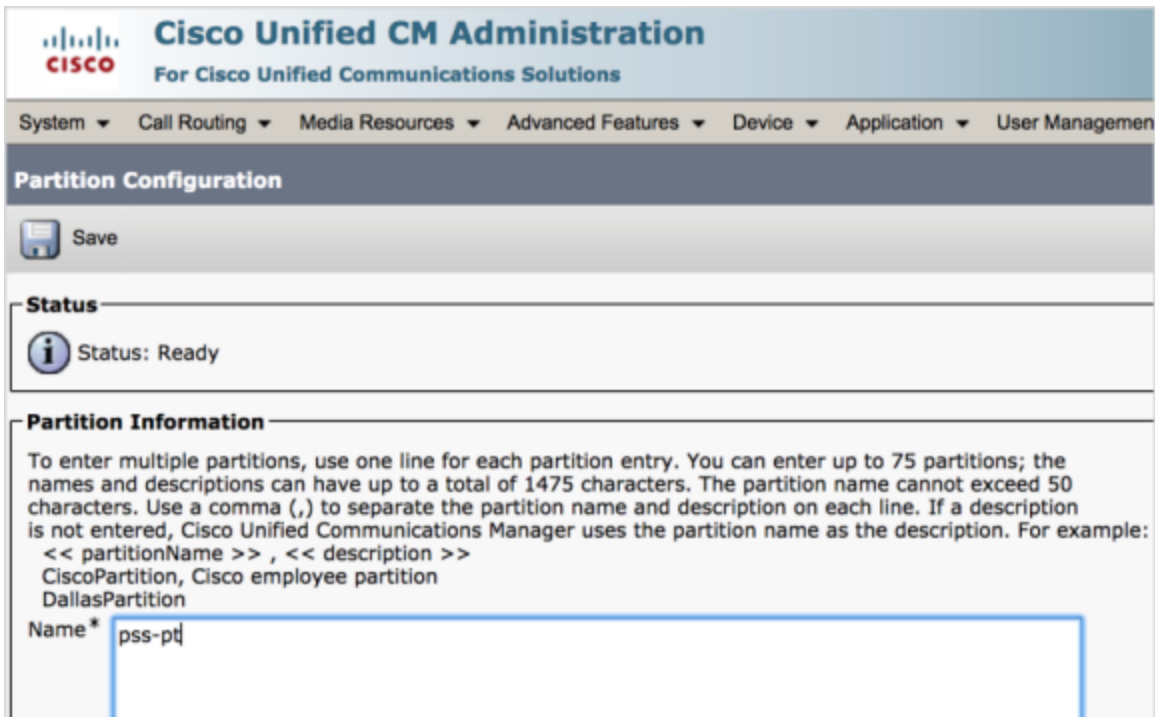


2. Click Add New.



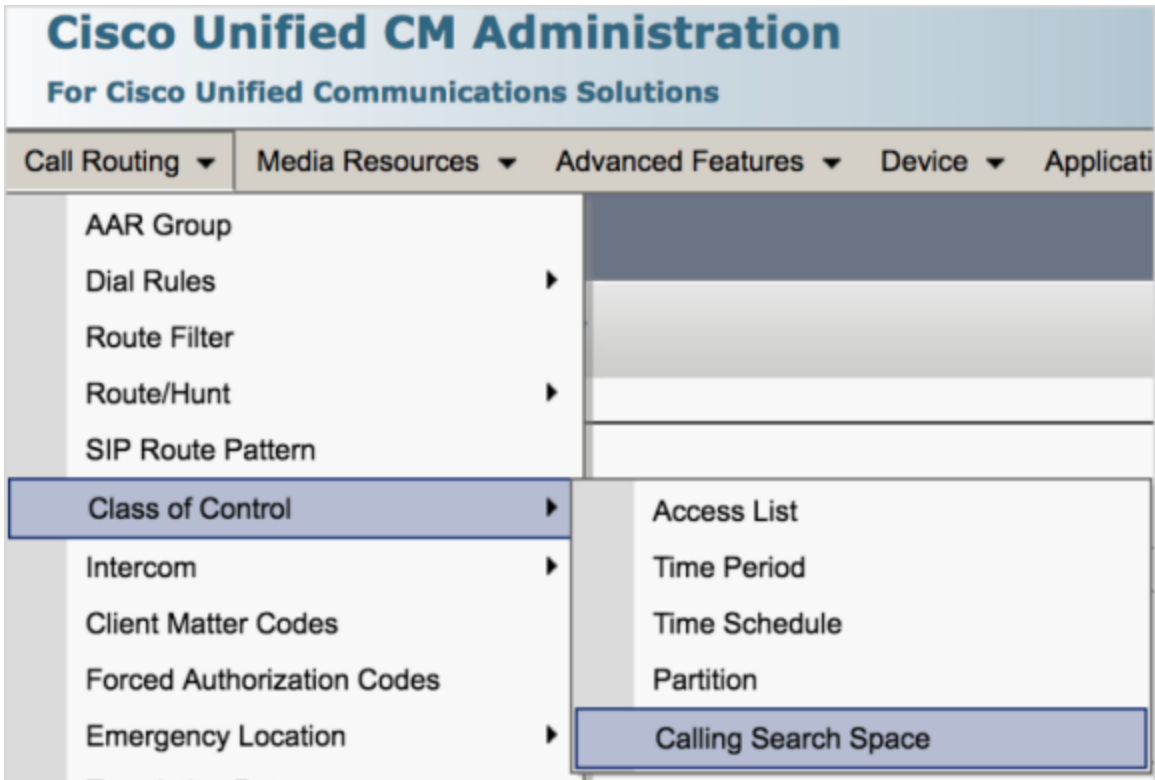
The screenshot shows the 'Find and List Partitions' page in Cisco Unified CM Administration. The page has a header with the Cisco logo and 'Cisco Unified CM Administration For Cisco Unified Communications Solutions'. A navigation bar includes 'Navigation', 'Cisco Unified CM Administration', and 'Go'. Below the navigation bar are several menu items: 'System', 'Call Routing', 'Media Resources', 'Advanced Features', 'Device', 'Application', 'User Management', 'Bulk Administration', and 'Help'. The main content area is titled 'Find and List Partitions' and contains an 'Add New' button with a plus sign. Below this is a search section for 'Partition' with a dropdown menu set to 'Name' and a radio button selected for 'begins with'. There is an empty search input field, a 'Find' button, a 'Clear Filter' button, and two small icons. A message below the search field reads: 'No active query. Please enter your search criteria using the options above.' At the bottom of the search section is another 'Add New' button.

3. Enter the Partition name.
4. Click **Save**.

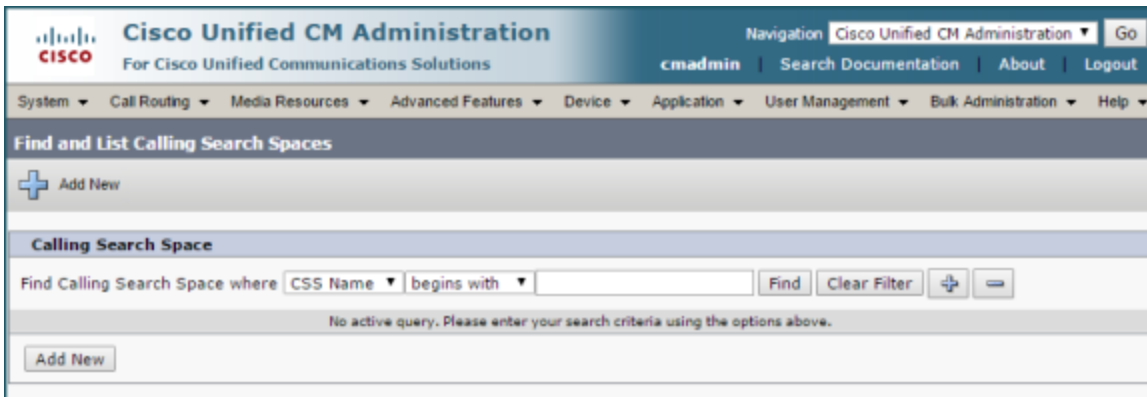


The screenshot shows the 'Partition Configuration' page in Cisco Unified CM Administration. The header is the same as the previous screenshot. The navigation bar includes 'System', 'Call Routing', 'Media Resources', 'Advanced Features', 'Device', 'Application', and 'User Management'. The main content area is titled 'Partition Configuration' and features a 'Save' button with a floppy disk icon. Below the save button is a 'Status' section with an information icon and the text 'Status: Ready'. The 'Partition Information' section contains instructions: 'To enter multiple partitions, use one line for each partition entry. You can enter up to 75 partitions; the names and descriptions can have up to a total of 1475 characters. The partition name cannot exceed 50 characters. Use a comma (,) to separate the partition name and description on each line. If a description is not entered, Cisco Unified Communications Manager uses the partition name as the description. For example: << partitionName >> , << description >> CiscoPartition, Cisco employee partition DallasPartition'. Below the instructions is a text input field labeled 'Name*' with the text 'pss-pt' entered.

5. Select Call Routing>Class of Control>Calling Search Space.







6. Click **Add New**.




7. Enter a Name.
8. Click **Save**.

System ▾ Call Routing ▾ Media Resources ▾ Advanced Features ▾ Device ▾ Application ▾ User Manage

Calling Search Space Configuration

 Save
  Delete
  Copy
  Add New

Status

 Status: Ready

Calling Search Space Information

Name*

Description

Route Partitions for this Calling Search Space

Available Partitions**

- Directory URI
- Global Learned E164 Numbers
- Global Learned E164 Patterns
- Global Learned Enterprise Numbers
- Global Learned Enterprise Patterns

▼ ▲

Selected Partitions

▼ ▲

- Write down the 'Route Partition' and 'Calling Search Space' names as these will need to be entered in Enterprise Manager under the Voice System Properties.

Enterprise Manager Properties

Enter the Partition and Calling Search Space in Enterprise Manager under Voice Systems>Properties.

Properties	
Name	
Allow Create Users	false
AXL Password	*****
AXL URL	https://<your CUCM host>:8443/axl/
AXL Username	pssaxluser
AXL Version	9.0
Calling Search Space	pss-css
Device Pool	PSS Device Pool
Device Type	Third-party SIP Device (Basic)
Digest Password	*****
Digest Realm	ccmsipline
Route Partition	pss-pt
Sip Profile	PSS Sip Profile
Sip Security Profile	PSS Security Profile
User Prefix	

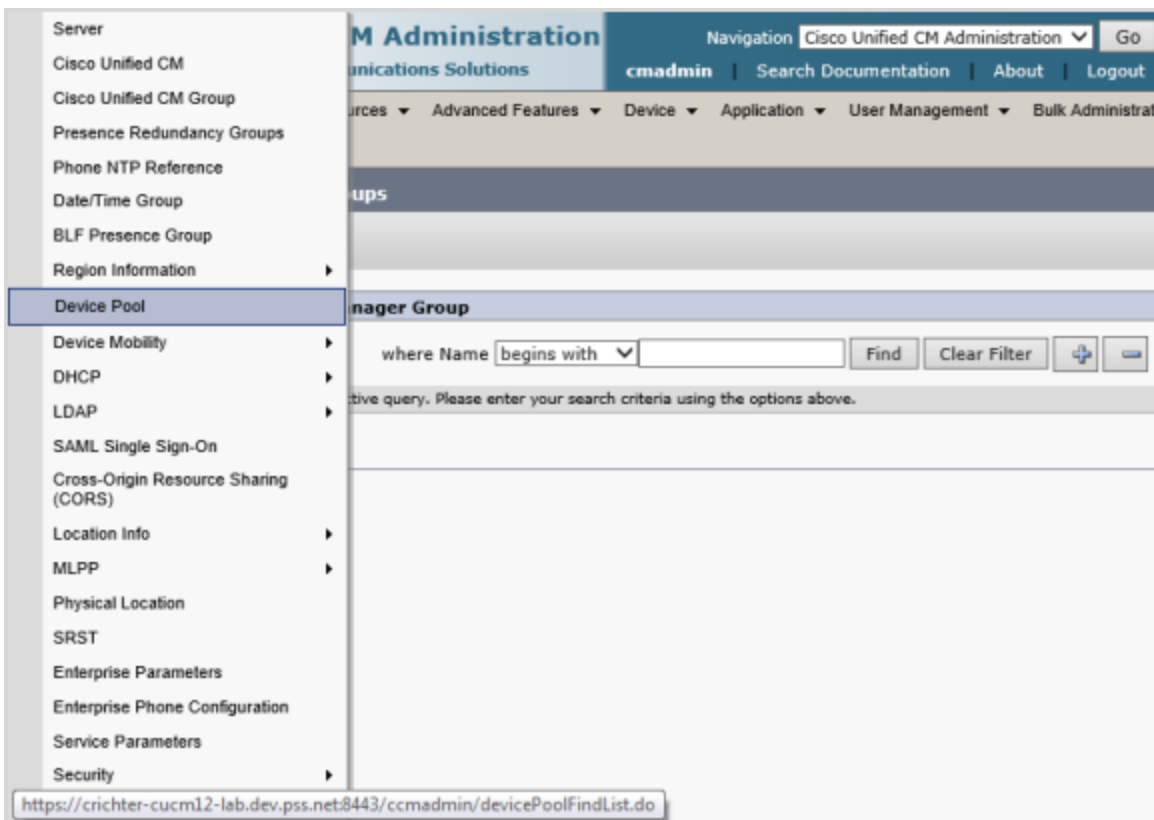
Device Pool

A separate Device Pool should be used for each CUCM Voice Setting in Enterprise Manager. The Device Pool is how Org Services knows where to find PatientTouch devices in CUCM. Take note of the name used for the Device Pool, this will be entered into Enterprise Mgr later.

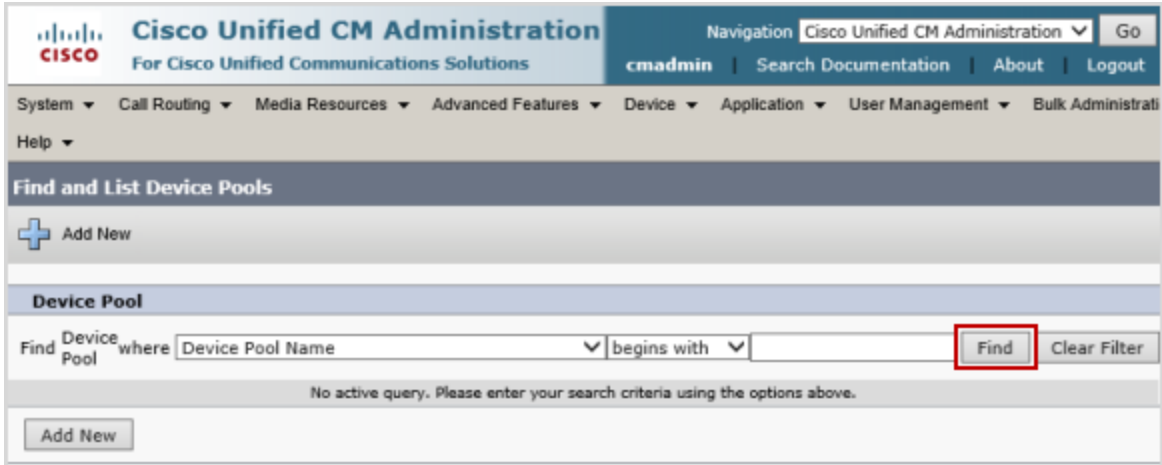
Only needed if you want to enable digest authentication. Add a new 'SIP Security Profile' and check 'Enable Digest Authentication'. Take note of the name you used for this SIP Security Profile, this will be configured in Enterprise Mgr later.

The device type must match 'Third-Party SIP Device (Basic)'.

1. From the System menu, select Device Pool.



2. Click Find.



Cisco Unified CM Administration
For Cisco Unified Communications Solutions

Navigation: Cisco Unified CM Administration

cmadmin | Search Documentation | About | Logout

System ▾ Call Routing ▾ Media Resources ▾ Advanced Features ▾ Device ▾ Application ▾ User Management ▾ Bulk Administration ▾

Help ▾

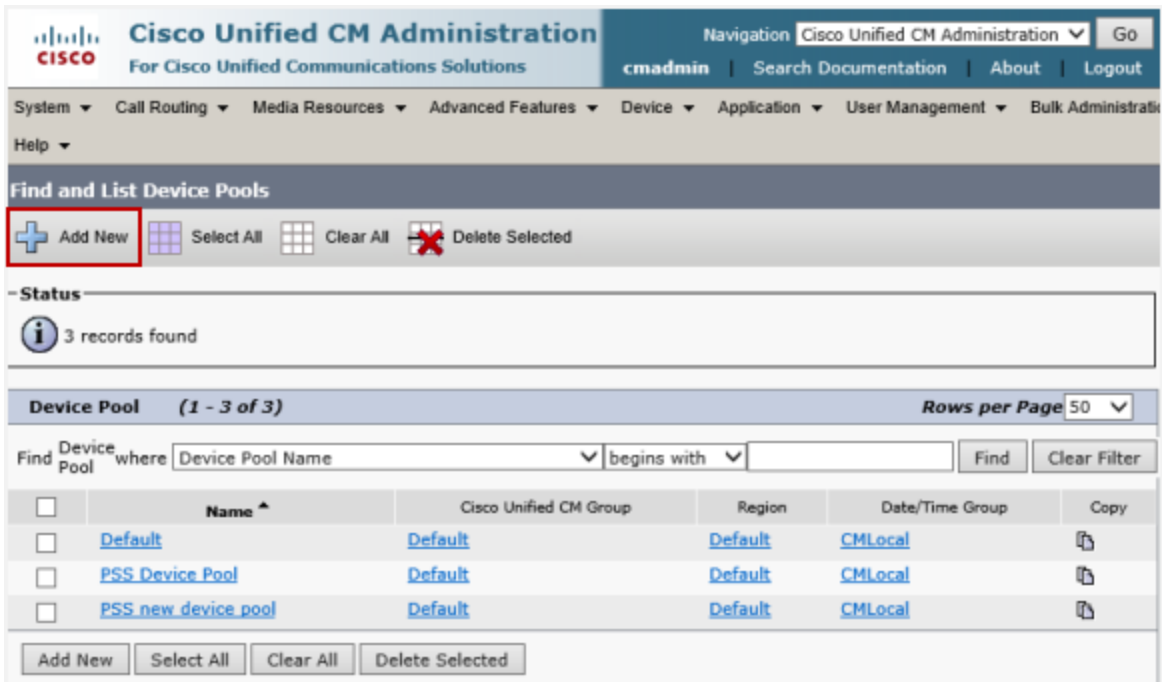
Find and List Device Pools

Device Pool

Find Device Pool where ▾ begins with

No active query. Please enter your search criteria using the options above.

3. Click **Add New**.



Cisco Unified CM Administration
For Cisco Unified Communications Solutions

Navigation: Cisco Unified CM Administration

cmadmin | Search Documentation | About | Logout

System ▾ Call Routing ▾ Media Resources ▾ Advanced Features ▾ Device ▾ Application ▾ User Management ▾ Bulk Administration ▾

Help ▾

Find and List Device Pools

-Status

3 records found

Device Pool (1 - 3 of 3) Rows per Page 50 ▾

Find Device Pool where ▾ begins with

<input type="checkbox"/>	Name ^	Cisco Unified CM Group	Region	Date/Time Group	Copy
<input type="checkbox"/>	Default	Default	Default	CMLocal	<input type="button" value="Copy"/>
<input type="checkbox"/>	PSS Device Pool	Default	Default	CMLocal	<input type="button" value="Copy"/>
<input type="checkbox"/>	PSS_new_device_pool	Default	Default	CMLocal	<input type="button" value="Copy"/>

4. Enter the following Device Pool Information:

- Device Pool Name -
- Cisco Unified Communications Manager Group - Default
- Calling Search Space for Auto-registration - pss css
- Date/Time Group - CMLocal
- Region - Default

Device Pool Information	
Device Pool:	New

Device Pool Settings	
Device Pool Name*	<input type="text" value="PSS Device Pool"/>
Cisco Unified Communications Manager Group*	Default
Calling Search Space for Auto-registration	pss-css
Adjunct CSS	< None >
Reverted Call Focus Priority	Default
Intercompany Media Services Enrolled Group	< None >

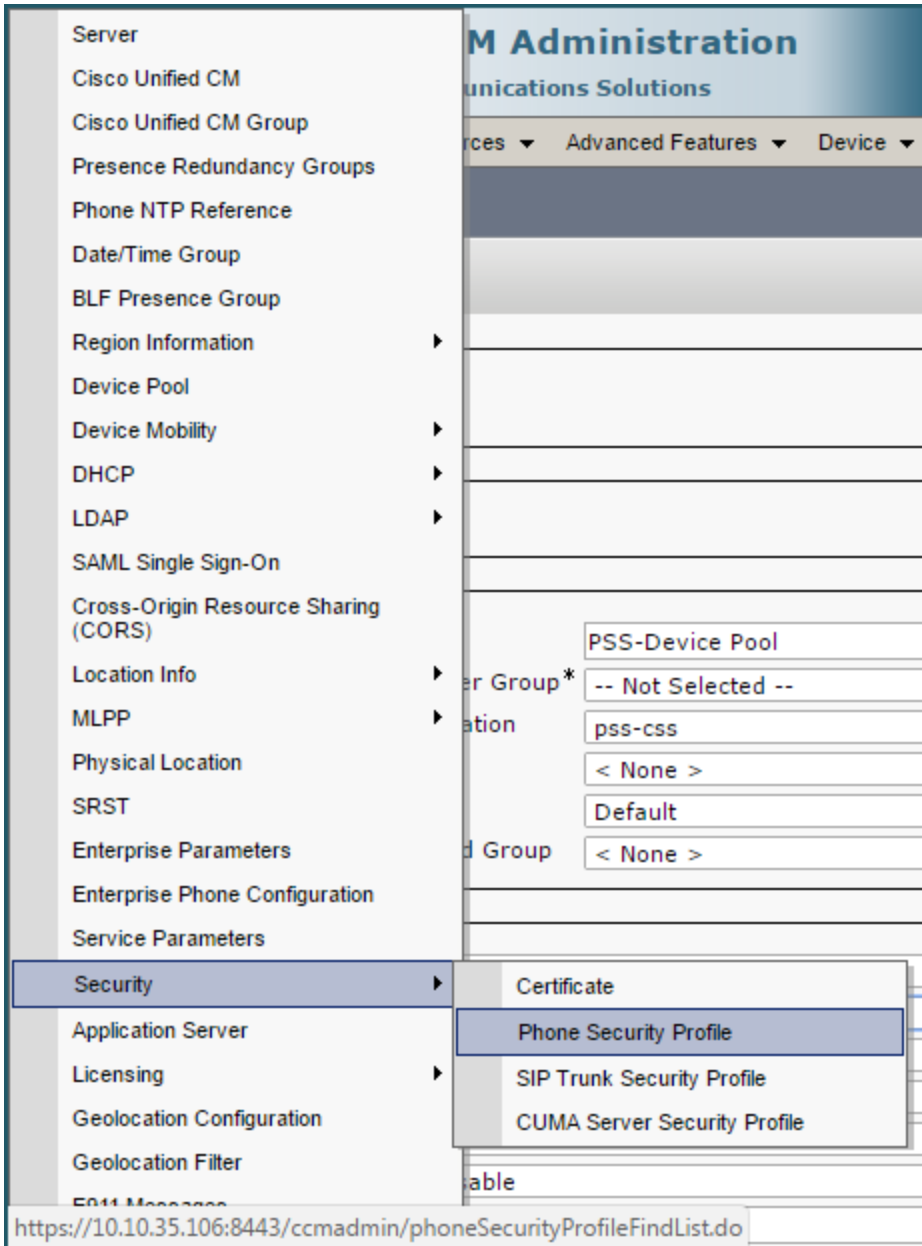
Roaming Sensitive Settings	
Date/Time Group*	CMLocal
Region*	Default
Media Resource Group List	< None >
Location	< None >
Network Locale	< None >
SRST Reference*	Disable
Connection Monitor Duration***	<input type="text"/>
Single Button Barge*	Default
Join Across Lines*	Default
Physical Location	< None >
Device Mobility Group	< None >

SIP Security Profile

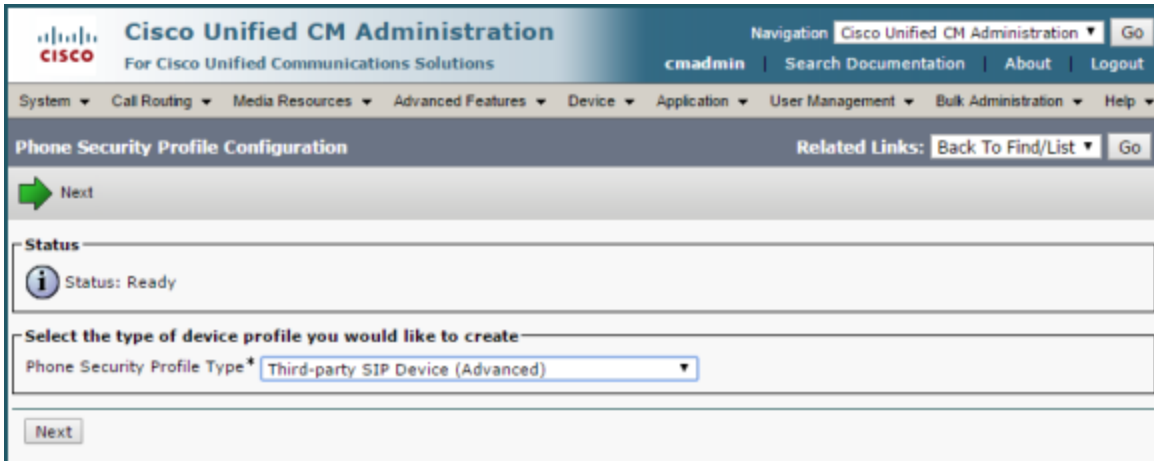
This is only needed if you want to enable digest authentication. Add a new SIP Security Profile and select 'Digest Authentication'. Take note of the name you used for this SIP Security Profile, this will be configured in Enterprise Manager later.

The device type must match the device type entered into Enterprise Manager. E.g. 'Third-Party SIP Device (Basic)'.

1. Click System>Security>Phone Security Profile.









2. Click **Add New**.
3. Enter the Phone Security Profile Type.
4. Click **Next**.




The screenshot displays the Cisco Unified CM Administration web interface. At the top, the header includes the Cisco logo and the text "Cisco Unified CM Administration For Cisco Unified Communications Solutions". A navigation bar contains links for "System", "Call Routing", "Media Resources", "Advanced Features", "Device", "Application", "User Management", "Bulk Administration", and "Help". The main content area is titled "Phone Security Profile Configuration" and features a "Next" button with a green arrow icon. Below this, a "Status" section shows "Status: Ready" with an information icon. A section titled "Select the type of device profile you would like to create" contains a dropdown menu for "Phone Security Profile Type*" with "Third-party SIP Device (Advanced)" selected. A "Next" button is located at the bottom of the form.

5. Enter the following information:

Phone Security Profile Configuration

 Save
 Delete
 Copy
 Reset
 Apply Config
 Add New

Status

 Status: Ready

Phone Security Profile Information

Product Type: Third-party SIP Device (Basic)

Device Protocol: SIP

Name *

Description

Nonce Validity Time *

Transport Type *

Enable Digest Authentication

Parameters used in Phone

SIP Phone Port *

Save Delete Copy Reset Apply Config Add New

Enterprise Manager Settings

Enter the name of the new device security profile in Enterprise Manager under Settings>Voice Systems>Properties.

Properties	
Name ↑	Value
Digest Realm	ccmsipline
No Answer Timeout	15
Route Partition	pss-pt
Sip Port	5060
Sip Profile	PSS Sip Profile
Sip Security Profile	PSS Basic Security Profile
User Prefix	pss_blue_

SIP Profile

Create a new SIP Profile for PatientTouch devices, take note of the name used, this will be configured in Enterprise Manager later.

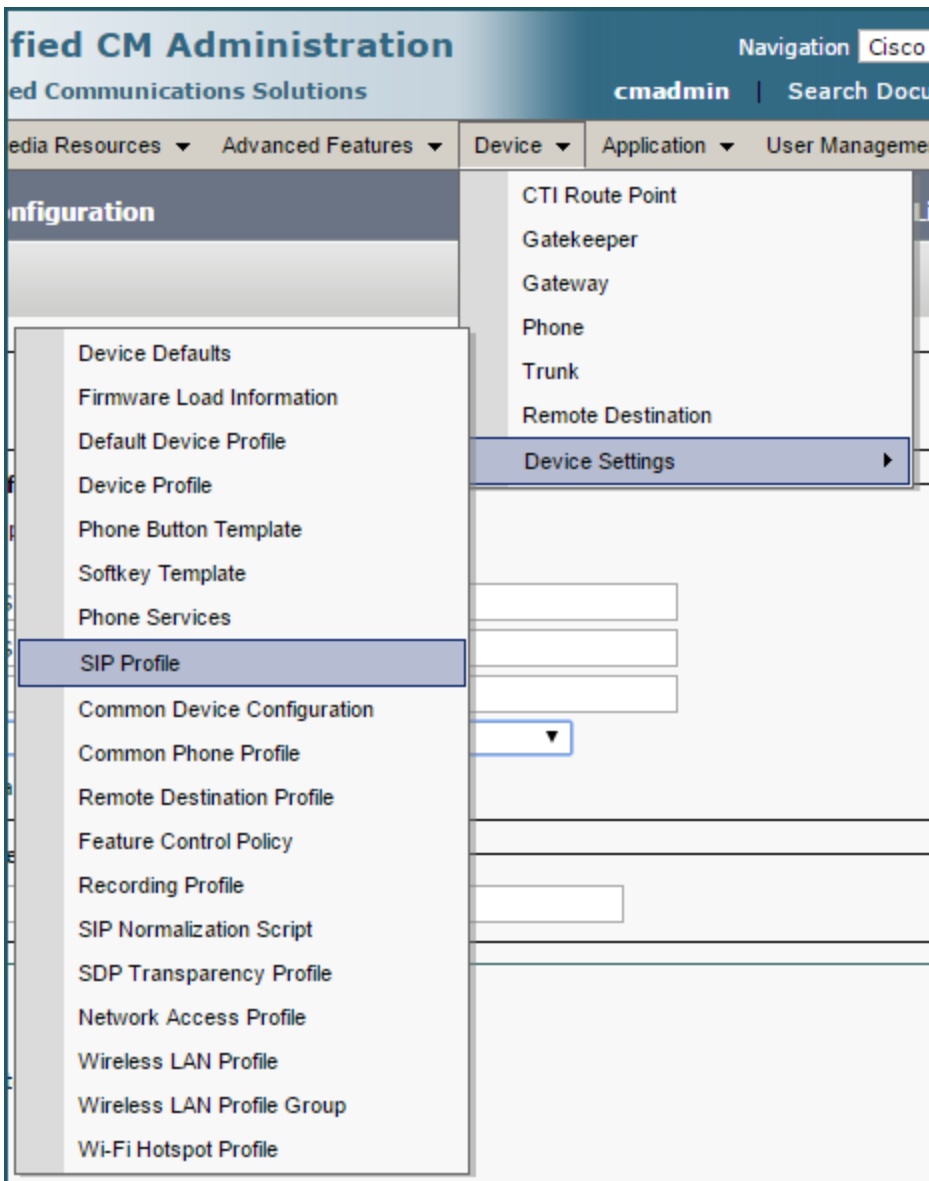
Call History has to be enabled on the CUCM server. Call history logs are uploaded by CUCM to the Org Services cluster over SFTP. Only logs for the route partition configured in 'Voice Systems' are considered.

Set the 'CDR File Time Interval' to '1' under 'System' -> 'Enterprise Parameters' (the call history records will be uploaded to Org Services every 1 minute).

- Directory should be '/callhistory/'
- User should be 'cucmsftp'
- Password is per install and provided by your PSS Support representative

Make sure 'Use Fully Qualified Domain Name in SIP requests' is enabled as well if you want to connect with a domain name instead of an IP (recommended):

1. Click Device>Device Settings>SIP Profile.



2. Click **Add New**.
3. Enter the following information:
 - Name
 - Description
 - Select the Redirect by Application check box
 - Select the Use Fully Qualified Domain Name in SIP Requests check box

Cisco Unified CM Administration

For Cisco Unified Communications Solutions

Navigation: Cisco Unified CM Administration ▼

[cadmin](#) | [Search Documentation](#) | [About](#) | [Logout](#)

System ▼ | Call Routing ▼ | Media Resources ▼ | Advanced Features ▼ | Device ▼ | Application ▼ | User Management ▼ | Bulk Administration ▼ | Help ▼

SIP Profile Configuration Related Links: [Back To Find/List](#) ▼

Status

i Status: Ready

i All SIP devices using this profile must be restarted before any changes will take affect.

SIP Profile Information

Name*	<input type="text" value="PSS SIP Profile"/>
Description	<input type="text" value="PSS SIP Profile"/>
Default MTP Telephony Event Payload Type*	<input type="text" value="101"/>
Early Offer for G.Clear Calls*	<input type="text" value="Disabled"/>
User-Agent and Server header information*	<input type="text" value="Send Unified CM Version Information as User-Agen"/>
Version in User Agent and Server Header*	<input type="text" value="Major And Minor"/>
Dial String Interpretation*	<input type="text" value="Phone number consists of characters 0-9, *, #, anc"/>
Confidential Access Level Headers*	<input type="text" value="Disabled"/>

Redirect by Application

Disable Early Media on 180

Outgoing T.38 INVITE include audio mline

Use Fully Qualified Domain Name in SIP Requests

Assured Services SIP conformance

SDP Information

SDP Session-level Bandwidth Modifier for Early Offer and Re-invites*	<input type="text" value="TIAS and AS"/>
SDP Transparency Profile	<input type="text" value="Pass all unknown SDP attributes"/>
Accept Audio Codec Preferences in Received Offer*	<input type="text" value="Default"/>

Require SDP Inactive Exchange for Mid-Call Media Change

Allow RR/RS bandwidth modifier (RFC 3556)

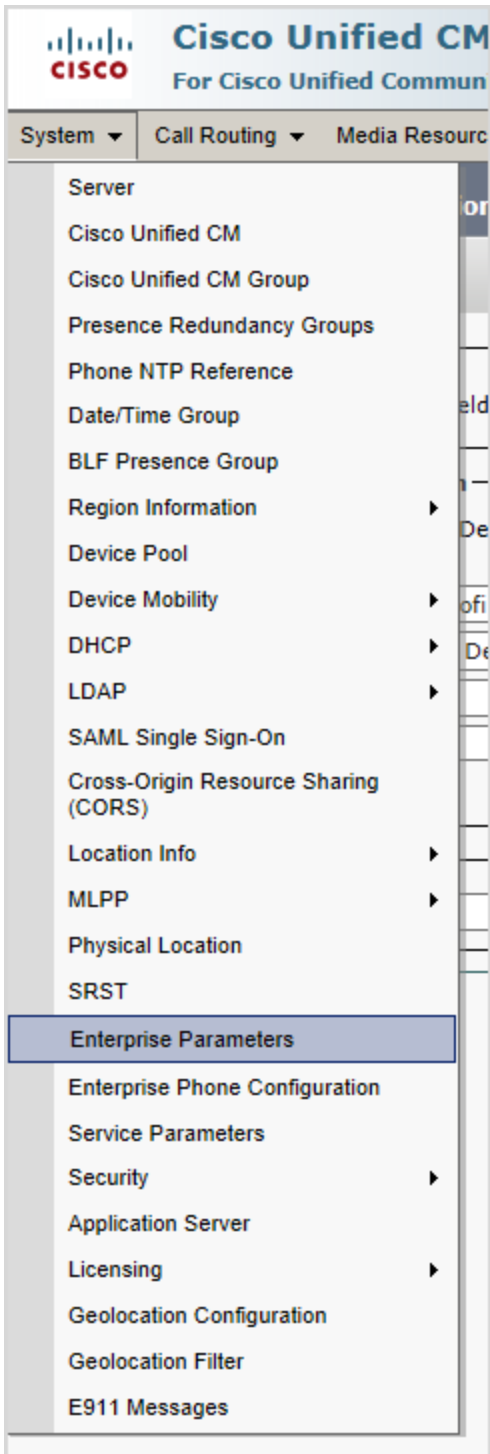
SIP Domain

The PatientTouch clients use the 'SIP Domain' when registering the SIP connection with CUCM, <extension>@<sipdomain>, e.g. 1000@cucm.mycompany.com.

This can be an IP or a fully qualified domain name (FQDN). The FQDN on the CUCM Publisher if set can be found below. Note this for later.

When connecting via a FQDN, make sure the SIP Security Profile (see previous section) has the setting 'Use Fully Qualified Domain Name in SIP requests' enabled.

1. Click **System>Enterprise Parameters**



2. Enter your CUCM server in the designated fields
3. Click **Save**

System ▾ Call Routing ▾ Media Resources ▾ Advanced Features ▾ Device ▾ Application ▾ User Management ▾ Bulk Administration ▾ Help ▾

Enterprise Parameters Configuration

Save Set to Default Reset Apply Config

Clusterwide Domain Configuration

[Organization Top Level Domain](#)

[Cluster Fully Qualified Domain Name](#)

Denial-of-Service Protection

[Denial-of-Service Protection](#) *

TLS Handshake Timer

[TLS Handshake Timer](#) *

TLS Resumption Timer

[TLS Resumption Timer](#) *

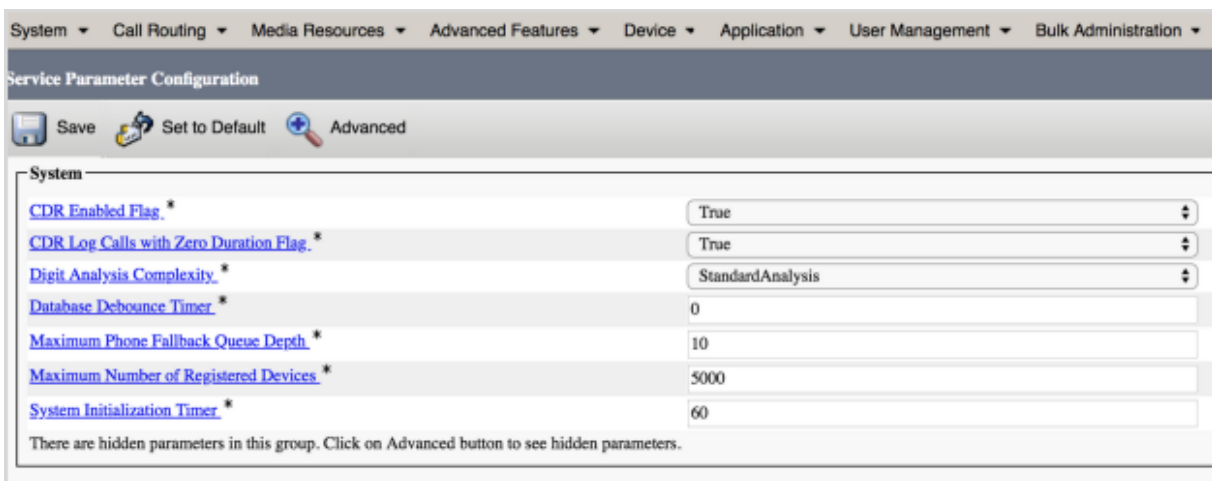
Call History

Call History has to be enabled on the CUCM server. Call history logs are uploaded by CUCM to the Org Services cluster over SFTP. Only logs for the route partition configured in Voice System are considered.

Set the 'CDR File Time Interval' to '1' under 'System' -> 'Enterprise Parameters' (the call history records will be uploaded to Org Services every 1 minute).

Go 'System' -> 'Service Parameters', then select the server and 'Cisco CallManager' this will bring up properties editor for call manager. Set the following:

- 'CDR Enabled Flag' to 'true'
- 'CDR Log Calls with Zero Duration Flag' to 'true'

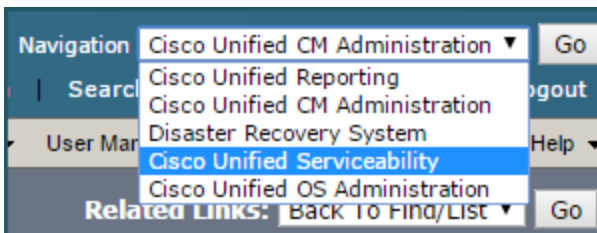


System	
CDR Enabled Flag *	True
CDR Log Calls with Zero Duration Flag *	True
Digit Analysis Complexity *	StandardAnalysis
Database Debounce Timer *	0
Maximum Phone Fallback Queue Depth *	10
Maximum Number of Registered Devices *	5000
System Initialization Timer *	60

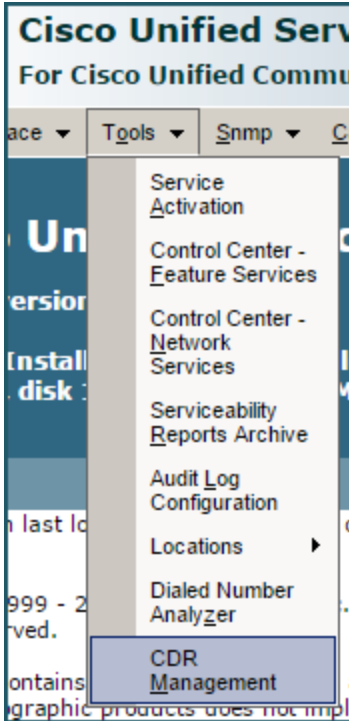
There are hidden parameters in this group. Click on Advanced button to see hidden parameters.

Then setup 'CDR Management':

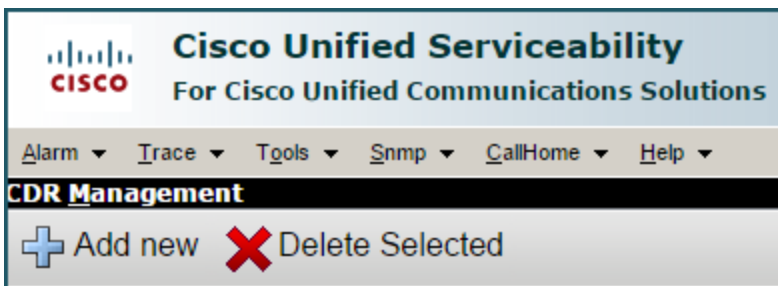
Select 'Cisco Unified Serviceability' and click 'Go'.



3. Click Tools>CDR Management.



4. Click **Add New** to add a new 'Billing Application Server'. This is just a server that accepts CDR CSV files, it's nothing to do with billing.



Fill out the Org Services server hostname (this can be any server in the org services cluster where cucm-sync is running. It can be a load balanced hostname/ip).

5. Enter the following information:
 - Host Name: enter your host name
 - User Name: should be 'cucmsftp'
 - Password: Password is per install and provided by your PSS Support representative
 - Directory Path: Should be '/callhistory/'

Cisco Unified Serviceability

For Cisco Unified Communications Solutions

[Alarm](#) ▾ |
 [Trace](#) ▾ |
 [Tools](#) ▾ |
 [Snmp](#) ▾ |
 [CallHome](#) ▾ |
 [Help](#) ▾

CDR Management

Billing Application Server Parameters

Host Name / IP Address*	<input type="text" value="blue.qa.pss.net"/>
User Name*	<input type="text" value="cucmsftp"/>
Password*	<input type="password" value="....."/>
Protocol*	<input type="button" value="SFTP ▾"/>
Directory Path*	<input type="text" value="/callhistory/"/>
Resend on Failure	<input checked="" type="checkbox"/>

* - indicates required item.

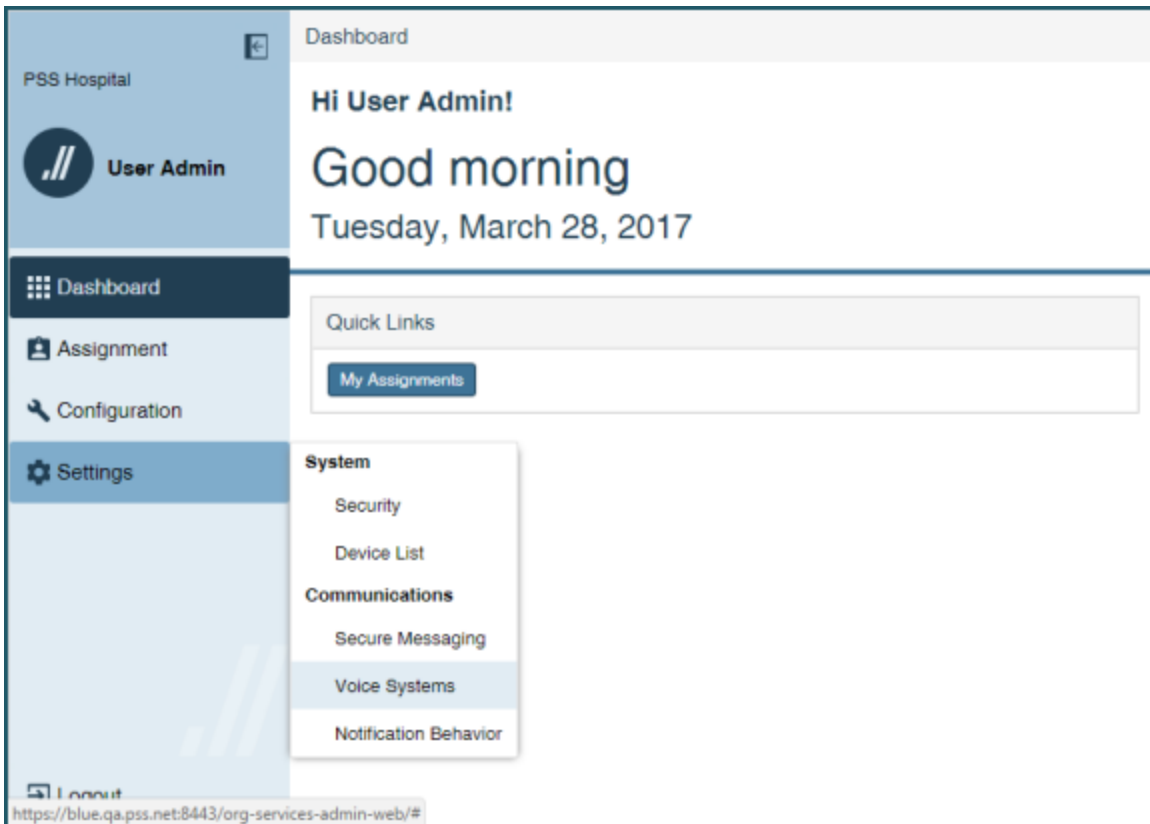
Updation of IPAddress/Hostname and Directory Path is not allowed, CD

Create New Voice System in Enterprise Manager

A 'Voice System' in Enterprise Manager allows directory numbers (extensions) to be provisioned on a Call Manager/PBX.

Note There may be an existing 'PatientTouch Voice Appliance' example Voice System added, remove this if connecting only to CUCM.

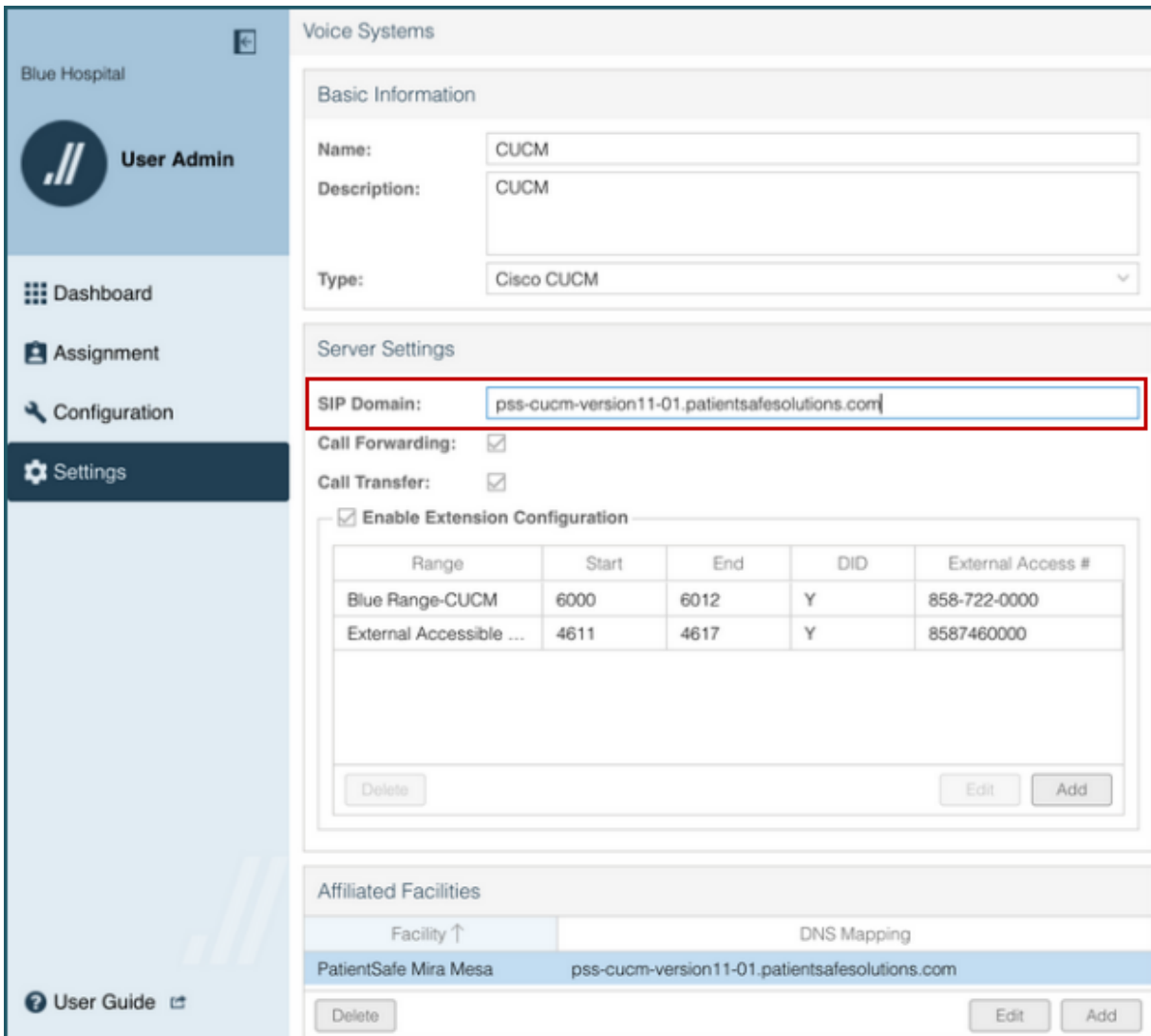
1. Select Settings>Voice Systems.



2. Click **Create New**.
Enter a Name.
3. Select 'Cisco CUCM' as the type
4. Make sure 'Enable Extension Configuration' is selected (it is selected by default).

Note When Enable Extension Configuration is enabled, users, devices and lines in CUCM will be managed by Enterprise Manager. When disabled Enterprise Mgr will only read these from CUCM. However, in both cases the forwarding number on the line will be updated every time a user logs in or changes it from the client.

5. Add the CUCM SIP domain under SIP Domain. This can be an IP but a fully qualified domain name (FQDN) is preferred. PatientTouch devices register over SIP to CUCM using this 'SIP Domain'



The screenshot shows the 'Voice Systems' configuration page. The left sidebar includes 'Blue Hospital', 'User Admin', 'Dashboard', 'Assignment', 'Configuration', and 'Settings'. The main content area is divided into sections: 'Basic Information', 'Server Settings', 'Affiliated Facilities', and 'User Guide'.

Basic Information

- Name: CUCM
- Description: CUCM
- Type: Cisco CUCM

Server Settings

- SIP Domain: pss-cucm-version11-01.patientsafesolutions.com
- Call Forwarding:
- Call Transfer:
- Enable Extension Configuration

Range	Start	End	DID	External Access #
Blue Range-CUCM	6000	6012	Y	858-722-0000
External Accessible ...	4611	4617	Y	8587460000

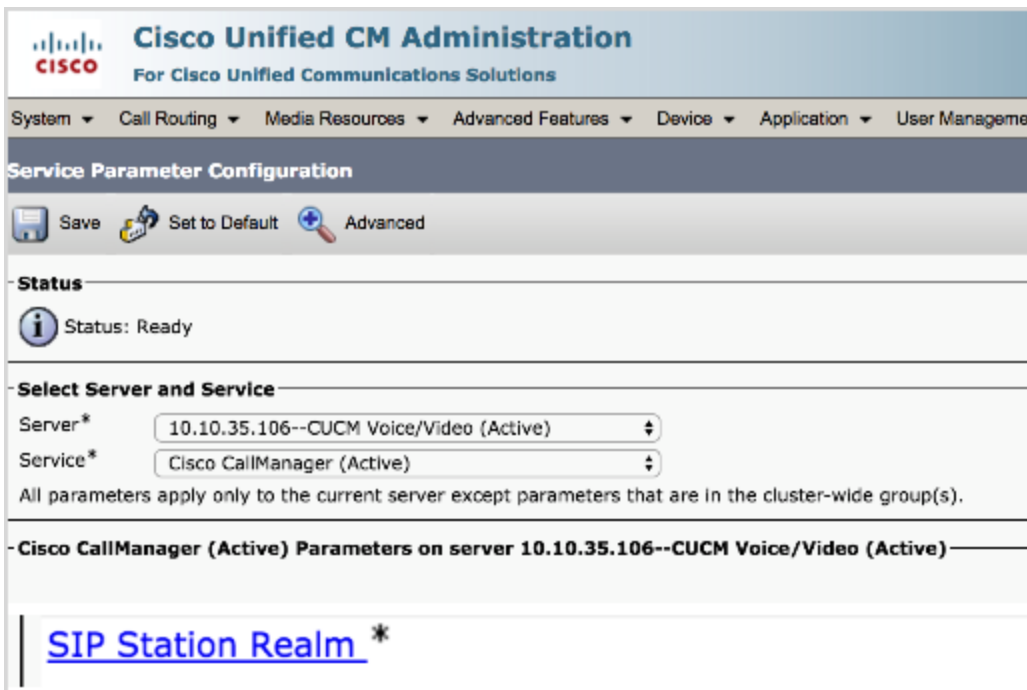
Affiliated Facilities

Facility ↑	DNS Mapping
PatientSafe Mira Mesa	pss-cucm-version11-01.patientsafesolutions.com

The PatientTouch clients use the 'SIP Domain' when registering the SIP connection with CUCM, <extension>@<sipdomain>, e.g. 1000@cucm.mycompany.com.

Affiliate with facilities you want the voice server to be available for. For each facility enter in the host name of the CUCM server to connect to. This can be different per facility. Multiple CUCM servers can be specified by comma separating them in this field.

The 'Digest Password' property in Enterprise Mgr allows you to set the digest password configured on CUCM. This password will be set by Org Services as the digest password for any users that have a PatientTouch extension. The PatientTouch client will authenticate with this password. The password is not sent directly to clients instead a hash of the username and Digest Realm is used. The default digest realm used in CUCM is 'ccmsipline'. If this is changed to something else in CUCM you will need to change the 'Digest Realm' property in Enterprise Mgr.



The screenshot shows the Cisco Unified CM Administration web interface. At the top, there is a navigation menu with options: System, Call Routing, Media Resources, Advanced Features, Device, Application, and User Management. The main heading is "Service Parameter Configuration". Below this, there are three buttons: "Save", "Set to Default", and "Advanced".

The "Status" section shows "Status: Ready".

The "Select Server and Service" section has two dropdown menus: "Server*" is set to "10.10.35.106--CUCM Voice/Video (Active)" and "Service*" is set to "Cisco CallManager (Active)". Below these is the text: "All parameters apply only to the current server except parameters that are in the cluster-wide group(s)".

The "Cisco CallManager (Active) Parameters on server 10.10.35.106--CUCM Voice/Video (Active)" section is partially visible, showing the "SIP Station Realm" parameter with an asterisk.

Enter the following properties:

- Set 'AXL Password' to the password for the AXL user you created.
- Set 'AXL URL' as the URL to the AXL API of CUCM host(s), example 'https://<cucm_host>:8443/axl/'.
- Set 'AXL Username' to the username for the AXL user you created.
- Set 'Calling Search Space' to the name of the PSS specific 'Calling Search Space' you added.
- Set 'Device Pool' to the name of the PSS specific 'Device Pool' you added.
- Set 'Device Type' to blank, by default 'Third-party SIP Device (Basic)' is used as the device type.
- Set 'Route Partition' to the name of the PSS specific 'Route Partition' you added.
- Set 'SIP Profile' to the name of the PSS specific 'SIP Profile' you added.
- Set 'SIP Security Profile' to the name of the PSS specific 'SIP Security Profile' you added.
- Set 'User Prefix' to blank - this is only used in test environments.

Other properties:

- Make sure 'Allow Create Users' is set to 'false' (it is by default) if users will already be created in CUCM via Active Directory (AD). If your CUCM install is NOT Active Directory integrated with 'CUCM Dir Sync', set this to 'true' so that Org Services will create the users as needed in CUCM.
- Set 'Digest Password' to a custom password - This will be used by the PatientTouch client devices to connect to CUCM.

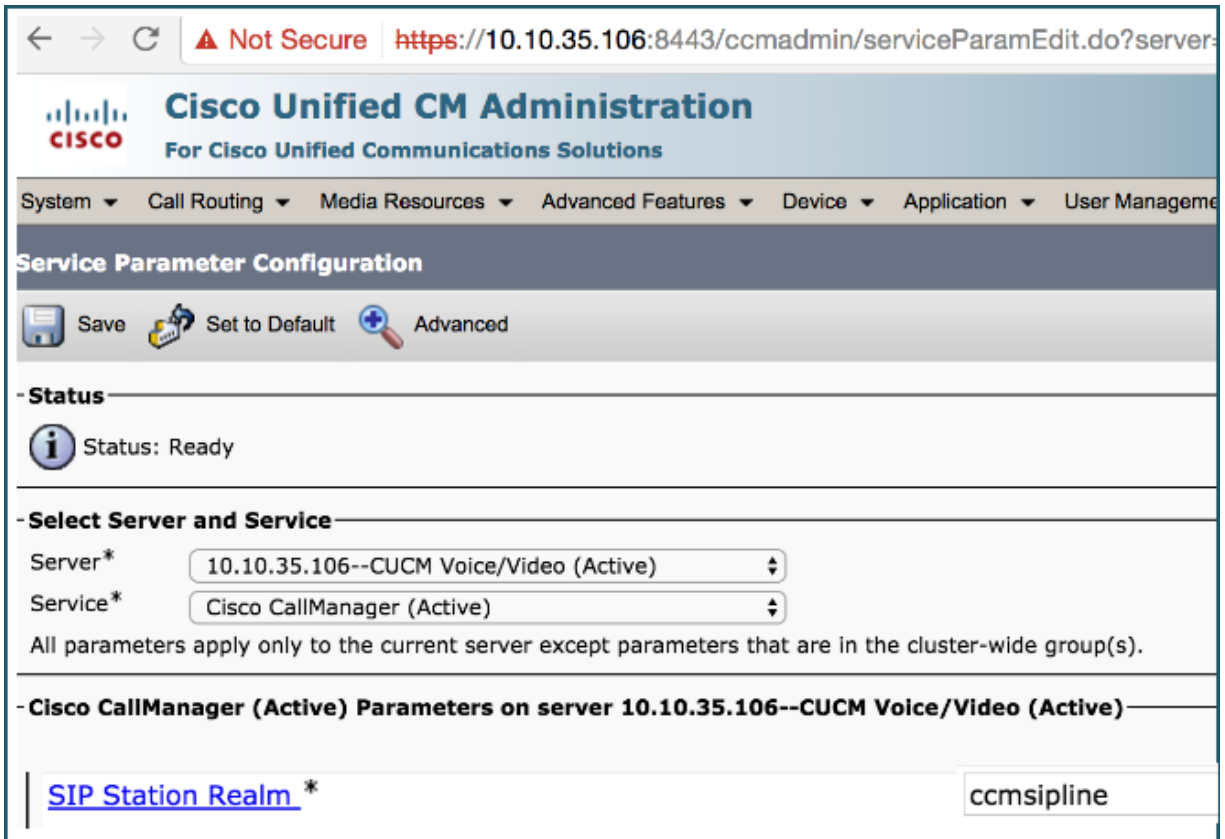
- Make sure the 'Digest Realm' matches the setting 'SIP Station Realm' in CUCM - See the 'Authentication' section below.
- Make sure the 'CUPI' settings are blank (they are by default) - these are only used in test environments.

Properties	
Name	
Allow Create Users	false
AXL Password	*****
AXL URL	https://<your CUCM host>:8443/axl/
AXL Username	pssaxluser
AXL Version	9.0
Calling Search Space	pss-css
Device Pool	PSS Device Pool
Device Type	Third-party SIP Device (Basic)
Digest Password	*****
Digest Realm	ccmsipline
Route Partition	pss-pt
Sip Profile	PSS Sip Profile
Sip Security Profile	PSS Security Profile
User Prefix	

Appendix

Authentication

The 'Digest Password' property in Enterprise Manager allows you to set the digest password configured on CUCM. This password will be set by Org Services as the digest password for any users that have a PatientTouch extension. The PatientTouch client will authenticate with this password. The password is not sent directly to clients instead a hash of the username and Digest Realm is used. The default digest realm used in CUCM is 'ccmsipline'. If this is changed to something else in CUCM you will need to change the 'Digest Realm' property in Enterprise Manager.



The screenshot shows the Cisco Unified CM Administration interface. The browser address bar displays a URL starting with https://10.10.35.106:8443/ccmadmin/serviceParamEdit.do?server. The page title is "Cisco Unified CM Administration For Cisco Unified Communications Solutions". A navigation menu includes System, Call Routing, Media Resources, Advanced Features, Device, Application, and User Management. The main content area is titled "Service Parameter Configuration" and includes buttons for Save, Set to Default, and Advanced. Below this, the "Status" section shows "Status: Ready". The "Select Server and Service" section has dropdown menus for "Server*" (10.10.35.106--CUCM Voice/Video (Active)) and "Service*" (Cisco CallManager (Active)). A note states: "All parameters apply only to the current server except parameters that are in the cluster-wide group(s)". The "Cisco CallManager (Active) Parameters on server 10.10.35.106--CUCM Voice/Video (Active)" section shows the "SIP Station Realm" parameter set to "ccmsipline".

Fully Qualified Domain Name

To connect with the fully qualified domain name for 'SIP Domain' you will need to make sure CUCM is configured correctly.

1. Under Cisco Unified CM Administration, select System>Enterprise Parameters.

Cisco Unified CM Administration
For Cisco Unified Communications Solutions

Server | Resources | Advanced Features

- Server
- Cisco Unified CM
- Cisco Unified CM Group
- Presence Redundancy Groups
- Phone NTP Reference
- Date/Time Group
- BLF Presence Group
- Region Information ▶
- Device Pool
- Device Mobility ▶
- DHCP ▶
- LDAP ▶
- SAML Single Sign-On
- Cross-Origin Resource Sharing (CORS)
- Location Info ▶
- MLPP ▶
- Physical Location
- SRST
- Enterprise Parameters**
- Enterprise Phone Configuration
- Service Parameters
- Security ▶
- Application Server
- Licensing ▶
- Geolocation Configuration
- Geolocation Filter
- E911 Messages

ing with an insufficient
e not configured in y
able to provision use
device is configured

Administration

2

Intel(R) Xeon(R) CPU E5-2
4Mbytes RAM, Partitions

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Inc.

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with U.S. and local country laws
with U.S. and local laws, return t

ryptographic products may be

unications Manager please visit

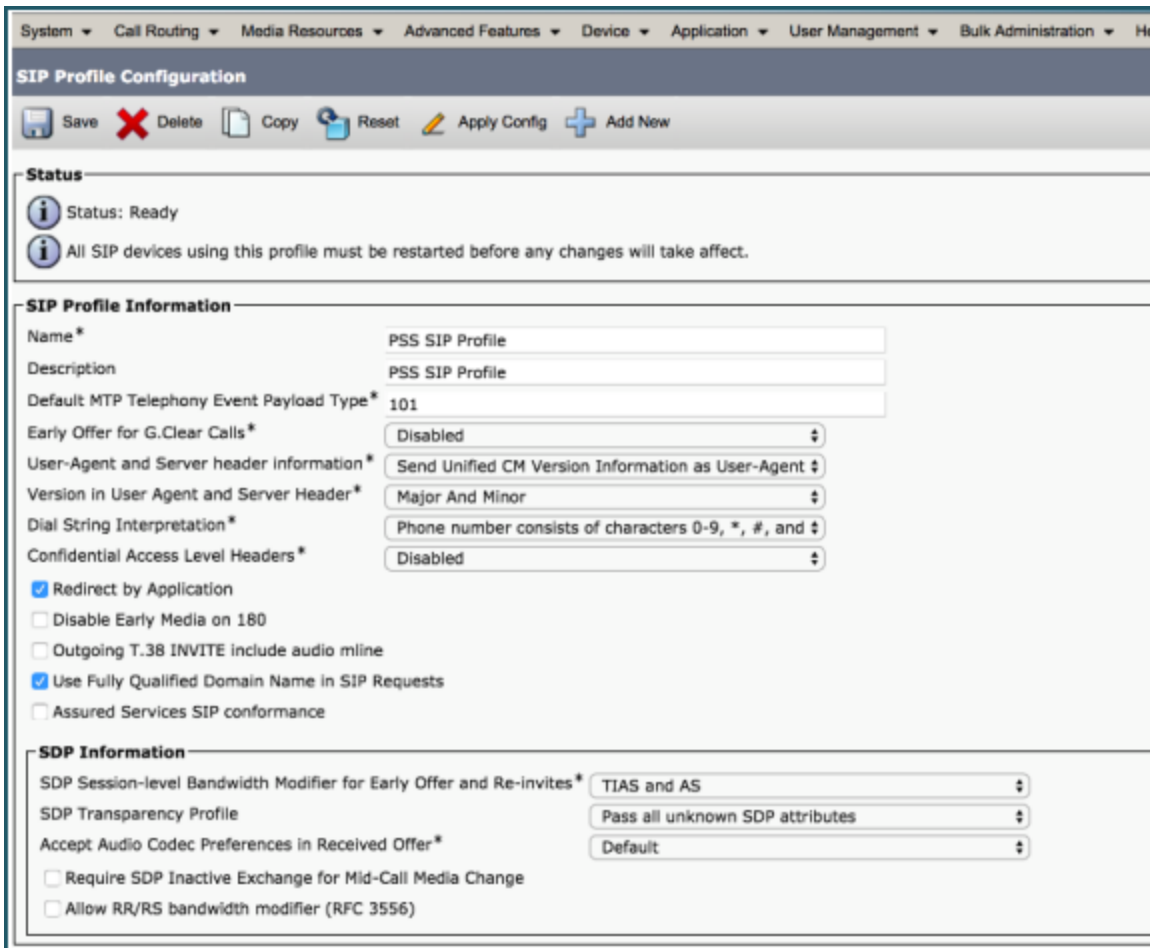
ur [Technical Support](#) web site.

Clusterwide Domain Configuration

[Organization Top Level Domain](#)

[Cluster Fully Qualified Domain Name](#)

- Under the SIP Security Profile (see section above), make sure 'Use Fully Qualified Domain Name in SIP requests' is enabled:



The screenshot displays the 'SIP Profile Configuration' interface. At the top, there is a navigation menu with options: System, Call Routing, Media Resources, Advanced Features, Device, Application, User Management, and Bulk Administration. Below the navigation is a toolbar with icons for Save, Delete, Copy, Reset, Apply Config, and Add New. The main content area is divided into three sections:

- Status:** Shows 'Status: Ready' and a note: 'All SIP devices using this profile must be restarted before any changes will take affect.'
- SIP Profile Information:** Contains fields for Name (PSS SIP Profile), Description (PSS SIP Profile), Default MTP Telephony Event Payload Type (101), and several dropdown menus for Early Offer for G.Clear Calls (Disabled), User-Agent and Server header information (Send Unified CM Version Information as User-Agent), Version in User Agent and Server Header (Major And Minor), Dial String Interpretation (Phone number consists of characters 0-9, *, #, and), and Confidential Access Level Headers (Disabled). There are also checkboxes for Redirect by Application (checked), Disable Early Media on 180, Outgoing T.38 INVITE include audio mline, Use Fully Qualified Domain Name in SIP Requests (checked), and Assured Services SIP conformance.
- SDP Information:** Contains dropdown menus for SDP Session-level Bandwidth Modifier for Early Offer and Re-invites (TIAS and AS), SDP Transparency Profile (Pass all unknown SDP attributes), and Accept Audio Codec Preferences in Received Offer (Default). There are also checkboxes for Require SDP Inactive Exchange for Mid-Call Media Change and Allow RR/RS bandwidth modifier (RFC 3556).

Licensing

The number of Cisco licenses required by your organization will depend on the number of devices your organization will connect to the network. For example, if your organization has 1500 nurses and 600 shared devices, then 600 licenses are required.

Care Role Forwarding extension numbers do not require any additional licenses.

If your licenses are of the type "User Connect Licensing", each device will utilize one "Enhanced" license. If your licenses are of the type "Unified Workspace Licensing", you may utilize either a "Standard" or "Professional" license. For more information on Cisco licensing, you may visit Cisco's licensing site.

License Type	Supported Devices
Essential UCL	<ul style="list-style-type: none"> • Cisco Unified SIP Phone 3905 • Cisco Unified IP Phone 6901 • Analog devices
Basic UCL	<ul style="list-style-type: none"> • Cisco Unified IP Phone 6911 and 6921 models • Any Essential device
Enhanced UCL or Enhanced Plus UCL or UWL Standard or UWL Professional	<ul style="list-style-type: none"> • Cisco Unified IP Phone 6941, 6945, and 6961 models • Cisco Unified IP Phone 7900 Series (7900G, 7911G, 7912G, 7931G, 794xG, 796xG, and 7975G models) • Cisco Unified IP Phone 8900 Series (8941, 8945, and 8961 models) • Cisco Unified IP Phone 9900 Series (9951 and 9971 models) with or without camera • Cisco Unified Wireless IP Phones Series (792xG and 7925G-EX models) • Cisco Unified IP Conference Stations (7936G and 7937G stations) • Cisco Unified Softphones (Cisco Unified Personal Communicator, Cisco UC Integration for Lync, Cisco UC Integration for Connect, and Cisco IP Communicator) • Jabber clients (Jabber for Mac, Jabber for Windows, Jabber for iPhone, Jabber for Android, Jabber for iPad and Jabber SDK) • Cisco Virtual Experience Clients (VXC) with voice and video firmware • Cisco TelePresence System E20 • TelePresence System EX Series (EX60 and EX90) • Third-party SIP devices • Any Basic or Essential device
Cisco TelePresence Room	<ul style="list-style-type: none"> • Cisco TelePresence Systems 500, 1000, 1100, 1300, 3000, 3200, TX9000, TX9200 • Cisco TelePresence System Profile 42-inch 6000 MXP, 52-inch MXP, 52-inch Dual MXP, 65-inch, and 65-inch Dual • Cisco TelePresence System Codecs C90, C60, and C40; Cisco TelePresence System Quick Set C20 • Cisco TelePresence MX Series (MX300 and MX200)