



PatientTouch® Enterprise Manager User Guide

June 2020

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June 2020

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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, contacts, and extensions
2. Manage Patient and Location Assignments
3. Configure the organization structure, including organization types (i.e. unit) and organization units (i.e. 3rd Floor) across multiple facilities
4. Configure the clinical attributes, including care roles and clinical profiles
5. Manage settings for system security, messaging and voice
6. Manage devices
7. View patient information

Introduction to Enterprise Manager Terms

Review the following Enterprise Manager terms to assist your learning.

1. Organization Unit Type

An Organization Unit Type (Org Type) is a classification that is given to a set of Organization Units. An Org Type may be a physical location such as a facility, floor, nursing unit, room, or bed. Org Types may contain parents and children. For example, an Org Type of "room" may have a parent of "nursing unit." It may have a child of "bed."

However, an Org Type may also be a non-physical location such as a team.

The table below provides a list of sample Org Types and corresponding Org Units.

Organization Unit Type	Corresponding Organization Unit
Building	5 Tower
Wings/Rooms	West wing, Emergency Room
Nursing Units	2e, 3s, 5w
Beds	101, 102, 103
ED	Zones (red, blue, pink)
Team	Rapid Response Team

2. Organization Unit

An Organization Unit (Org Units) is an instance of an Org Type. Org Units can be a physical or non-physical location.

For example, an Org Type of "facility" may have a smaller, specialty unit called "PSS Hospital."

The table below provides a list of sample Org Types and corresponding Org Units.

Organization Unit Type	Corresponding Organization Unit
Building	5 Tower
Wings/Rooms	West wing, Emergency Room
Nursing Units	2e, 3s, 5w
Beds	101, 102, 103
ED	Zones (red, blue, pink)
Team	Rapid Response Team

3. Care Role

A care role (i.e. Primary Nurse) is a title given to an Enterprise Manager user that describes the role of the user within the hospital and his/her relationship to a patient or org unit. Care roles in the Enterprise Manager describe what responsibilities the user will have in the Enterprise Manager as well as the Clinical Manager. A care role can be a physician, specialist (cardiologist), CNA, primary nurse, charge nurse, on-call cardiologist, phlebotomist, housekeeper, etc.

Any caregiver who will be working with patients must be assigned a care role. Care roles are assigned to patients or org units. For example, a care role (Primary Nurse) may be assigned to a patient. However, the Charge Nurse care role may be assigned to an entire floor (Org Unit).

Care roles are associated to Enterprise Manager clinical profiles. One care role may have one or more associated clinical profiles, which would provide that user with a different set of permissions yet only have one care role. For example, a House Supervisor may be associated with two clinical profiles: House Supervisor and Floor Supervisor.

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

Care Role	Description	Assigned To
Charge Nurse	Charge Nurse for Unit	Org Unit
Consulting Cardiologist	Cardiologist consulting for a specific patient visit	Patient
Pharmacist	Pharmacist for a location or set of locations	Org Unit
Primary Nurse	Primary Nurse for a patient	Patient
Physician	General Practitioner for a patient	Patient
Covering Oncologist	Specialist for an entire nursing unit	Org Unit

4. Clinical Profile

A clinical profile is a set of permissions given to users associated with that profile. The permissions allow users to perform certain functions in the Enterprise Manager, Clinical Manager, or PatientTouch. For example, a clinical profile may have the permission set of a physician, phlebotomist, primary nurse, etc. These permissions must map to the similar role in the Clinical Manager. This is done by the use of a clinical profile "code." It is this code that is mapped to roles in the Clinical Manager. For example, a clinical profile code of Primary Nurse would be mapped to the Staff Nurse role in the Clinical Manager.

Clinical profiles are associated to Care Roles. Typically, there is a 1:1 relationship between care roles and clinical profiles. For example, a Primary Nurse care role will typically have a Primary Nurse clinical profile. However, users may have one care role but multiple associated clinical profiles.

For example, the table below provides clinical profiles matched to care roles and assignments.

Clinical Profile	Care Role(s)	Assigned To
Physician	Physician	Patient
	MD After Hour	Org Unit
Phlebotomist	Unit Phlebotomist	Org Unit
	ED Phlebotomist	Org Unit
Primary Nurse	Primary Nurse	Patient
	ED Nurse	Org Unit
	Crash Team	Org Unit

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:

Password:

Login

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Logging Out

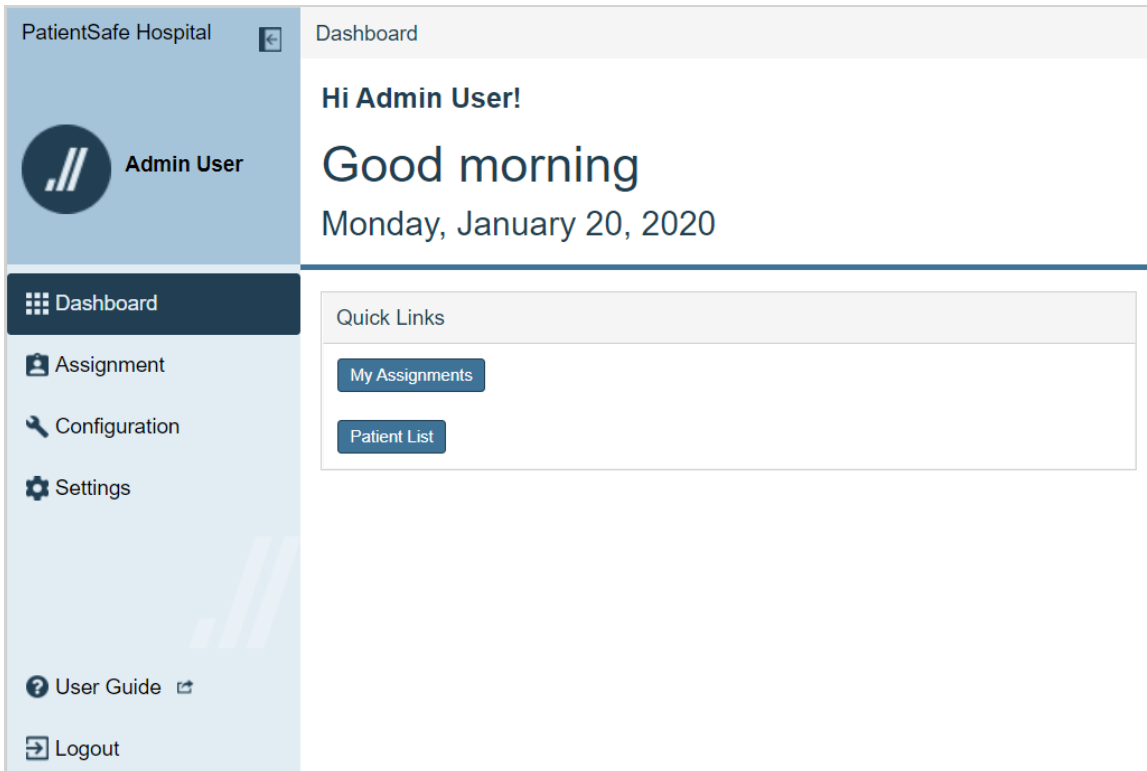
Click **Logout** from the bottom left hand side of the screen to log out of Enterprise Manager.

The screenshot displays the user interface of the PatientSafe Hospital Enterprise Manager. The top left corner shows the organization name "PatientSafe Hospital" and the user's name "Admin User" next to a profile icon. The main header area contains the text "Hi Admin User!", "Good morning", and "Monday, January 20, 2020". A sidebar on the left lists navigation options: "Dashboard", "Assignment", "Configuration", "Settings", "User Guide", and "Logout". The "Logout" button at the bottom of the sidebar is highlighted with a red rectangular box. The main content area features a "Quick Links" section with two buttons: "My Assignments" and "Patient List".

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.




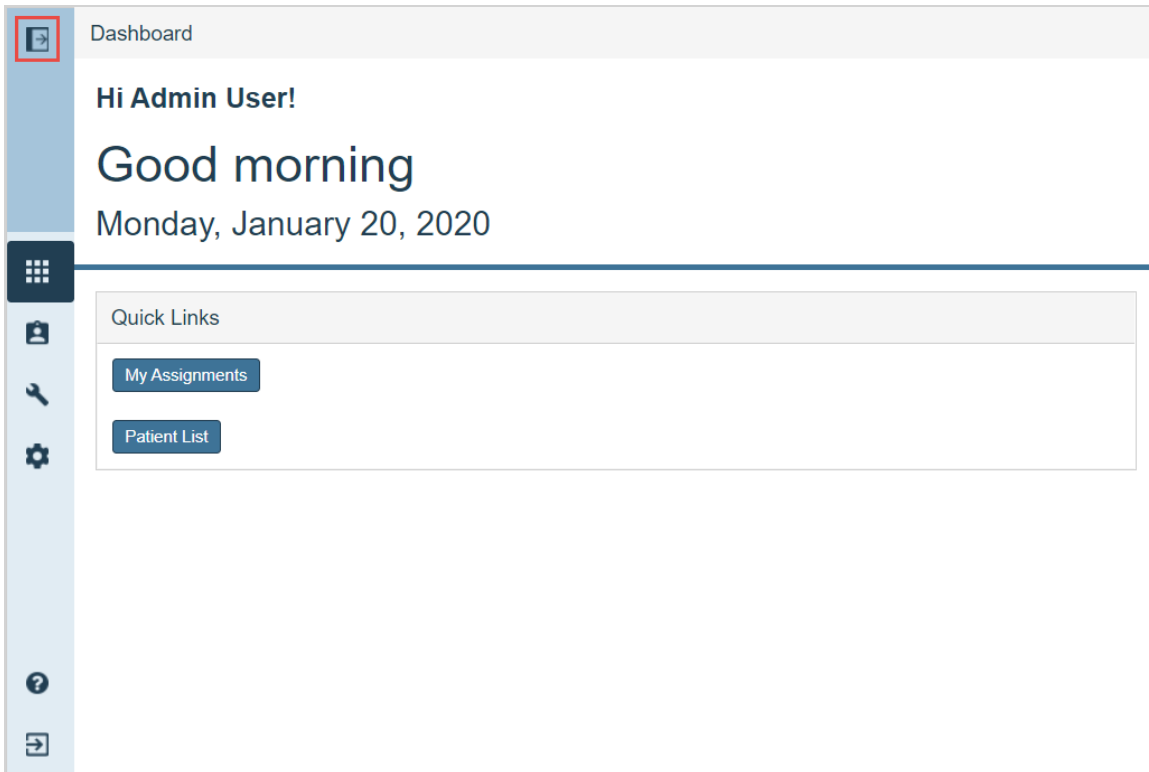
My Assignments displays a list of all of your assignments. Click My Assignments on the Contents tab to the left or click the link below to learn more.

- [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 it's normal size.

My Assignments

Caregivers can assign patients and locations using both the Enterprise Manager and the Clinical Manager. Please follow the instructions below to assign patients using the Enterprise Manager. When using the Enterprise Manager, you must have the appropriate privileges under your User Account in order to complete the task.

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

The screenshot displays the user interface for Judy Cartwright on the PatientSafe Hospital dashboard. The top navigation bar shows 'PatientSafe Hospital' and 'Dashboard'. The main content area greets the user with 'Hi Judy Cartwright!' and 'Good morning Monday, January 20, 2020'. Below this, a 'Quick Links' section features two buttons: 'My Assignments' (which is highlighted with a red rectangular box) and 'Patient List'. The left sidebar contains a menu with icons and labels for 'Dashboard', 'Assignment', 'Configuration', 'Settings', 'User Guide', and 'Logout'.

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

PatientSafe Hospital

Judy Cartwright



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



My As... 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 t...
OR nurse	Room	No	No	This is a nurse that...
Primary Nurse	Patient	Yes	No	
<i>Primary Nurse 2</i>	<i>Patient</i>	<i>No</i>	<i>No</i>	
RN After-Hour	Team	Yes	Yes	


Next

4. Double-click your Nursing Unit.

PatientSafe Hospital  Assignment: Primary Nurse  Facility: PatientSafe Mira Mesa

Patient List: Nursing Unit:  Search 

<input type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input type="checkbox"/>	11...					Judy Cartwright
<input type="checkbox"/>	0...					Judy Cartwright
<input type="checkbox"/>	0...					Judy Cartwright
<input type="checkbox"/>	1...					Judy Cartwright

Select a Nursing Unit Search by Nursing Unit 

Nursing Unit ↑

- 2-West
- 3RDFLOOR**
- 4 WEST
- 9 WEST
- CCU
- ED
- Zohreh Unit1

Page 1 of 1 | 1 - 7 of 6


<input type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Care Role	
<input type="checkbox"/>	122 3	3RDFL...	Riley	Emma	M11101	V11101	Primar...
<input type="checkbox"/>	111 1	2-WEST	Dewitt	Anna	M1004	V1004	Primar...
<input type="checkbox"/>	112 1	2-WEST	Honda	Dwight	M1005	V1005	Primar...

Assign Unassign

- 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.

PatientSafe Hospital
Assignment: Primary Nurse
Facility: PatientSafe Mira Mesa



Judy Cartwright

Patient List: Nursing Unit: 3RDFLOOR

Search

<input type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input checked="" type="checkbox"/>	200 1	Scott	Caan	M110...	V11...	
<input checked="" type="checkbox"/>	120 1	Clark	Kent	M100...	V10...	
<input type="checkbox"/>	111 1	Frank	Burns	M100...	V10...	Judy Cartwright
<input type="checkbox"/>	122 3	Emma	Riley	M11101	V11...	Judy Cartwright

Assign 2 patient(s): 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"/>	111 1	3RDFL...	Burns	Frank	M100006	V100006	Primar...
<input type="checkbox"/>	122 3	3RDFL...	Riley	Emma	M11101	V11101	Primar...
<input type="checkbox"/>	111 1	2-WEST	Dewitt	Anna	M1004	V1004	Primar...
<input type="checkbox"/>	112 1	2-WEST	Hender...	Dwight	M1005	V1005	Primar...

Unassign

Back

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.

PatientSafe Hospital
Assignment: Primary Nurse
Facility: PatientSafe Mira Mesa

Judy Cartwright

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

Patient List: Nursing Unit: 3RDFLOOR

<input type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input type="checkbox"/>	200 1	Scott	Caan	M110...	V11...	Judy Cartwright
<input type="checkbox"/>	120 1	Clark	Kent	M100...	V10...	Judy Cartwright
<input type="checkbox"/>	111 1	Frank	Burns	M100...	V10...	Judy Cartwright
<input type="checkbox"/>	122 3	Emma	Riley	M11101	V11...	Judy Cartwright

Current Assignments Patients (6) Org Units (3)

<input type="checkbox"/>	Location	Nursing Unit	Last Name	First Name	MRN	Visit #	Care Role
<input type="checkbox"/>	122 3	3RDFL...	Riley	Emma	M11101	V1101	Primar...
<input type="checkbox"/>	111 1	2-WEST	Dewitt	Anna	M1004	V1004	Primar...
<input type="checkbox"/>	112 1	2-WEST	Hende...	Dwight	M1005	V1005	Primar...
<input type="checkbox"/>	200 1	3RDFL...	Caan	Scott	M110099	V110099	Primar...
<input type="checkbox"/>	120 1	3RDFL...	Kent	Clark	M100027	V100027	Primar...

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

PatientSafe Hospital
Assignment: Primary Nurse
Facility: PatientSafe Mira Mesa

Judy Cartwright

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

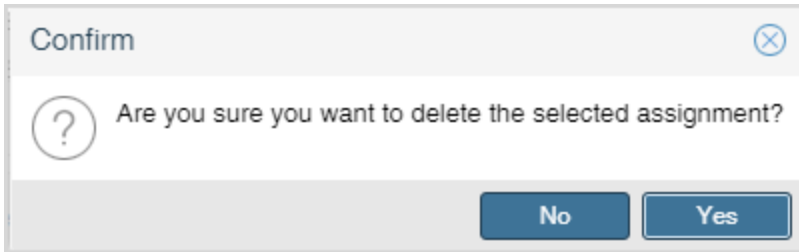
Patient List: Nursing Unit: 3RDFLOOR

<input type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input type="checkbox"/>	200 1	Scott	Caan	M110...	V11...	Judy Cartwright
<input type="checkbox"/>	120 1	Clark	Kent	M100...	V10...	Judy Cartwright
<input type="checkbox"/>	111 1	Frank	Burns	M100...	V10...	Judy Cartwright
<input type="checkbox"/>	122 3	Emma	Riley	M11101	V11...	Judy Cartwright

Current Assignments Patients (6) Org Units (3)

<input type="checkbox"/>	Location	Nursing Unit	Last Name	First Name	MRN	Visit #	Care Role
<input type="checkbox"/>	122 3	3RDFL...	Riley	Emma	M11101	V1101	Primar...
<input checked="" type="checkbox"/>	111 1	2-WEST	Dewitt	Anna	M1004	V1004	Primar...
<input type="checkbox"/>	112 1	2-WEST	Hende...	Dwight	M1005	V1005	Primar...
<input type="checkbox"/>	200 1	3RDFL...	Caan	Scott	M110099	V110099	Primar...
<input type="checkbox"/>	120 1	3RDFL...	Kent	Clark	M100027	V100027	Primar...

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



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"/>	200 1	Scott	Caan	M110...	V11...	Judy Cartwright
<input type="checkbox"/>	120 1	Clark	Kent	M100...	V10...	Judy Cartwright
<input type="checkbox"/>	111 1	Frank	Burns	M100...	V10...	Judy Cartwright
<input type="checkbox"/>	122 3	Emma	Riley	M11101	V11...	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"/>	111 1	3RDFL...	Burns	Frank	M100006	V100006	Primar...
<input type="checkbox"/>	122 3	3RDFL...	Riley	Emma	M11101	V11101	Primar...
<input type="checkbox"/>	112 1	2-WEST	Hende...	Dwight	M1005	V1005	Primar...
<input type="checkbox"/>	200 1	3RDFL...	Caan	Scott	M110099	V110099	Primar...
<input type="checkbox"/>	120 1	3RDFL...	Kent	Clark	M100027	V100027	Primar...

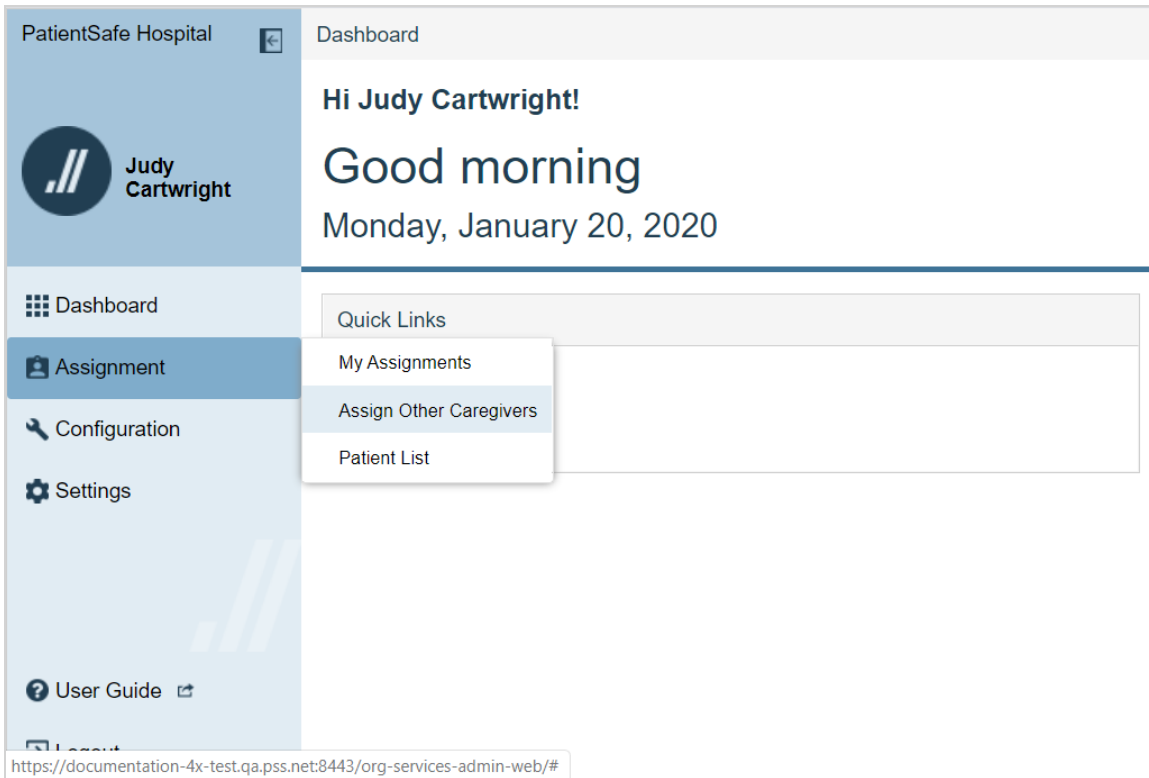
Unassign

Back

Assign Other Caregivers

Caregivers can assign other caregivers using both the Enterprise Manager and the Clinical Manager. Please follow the instructions below to assign patients using the Enterprise 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**.



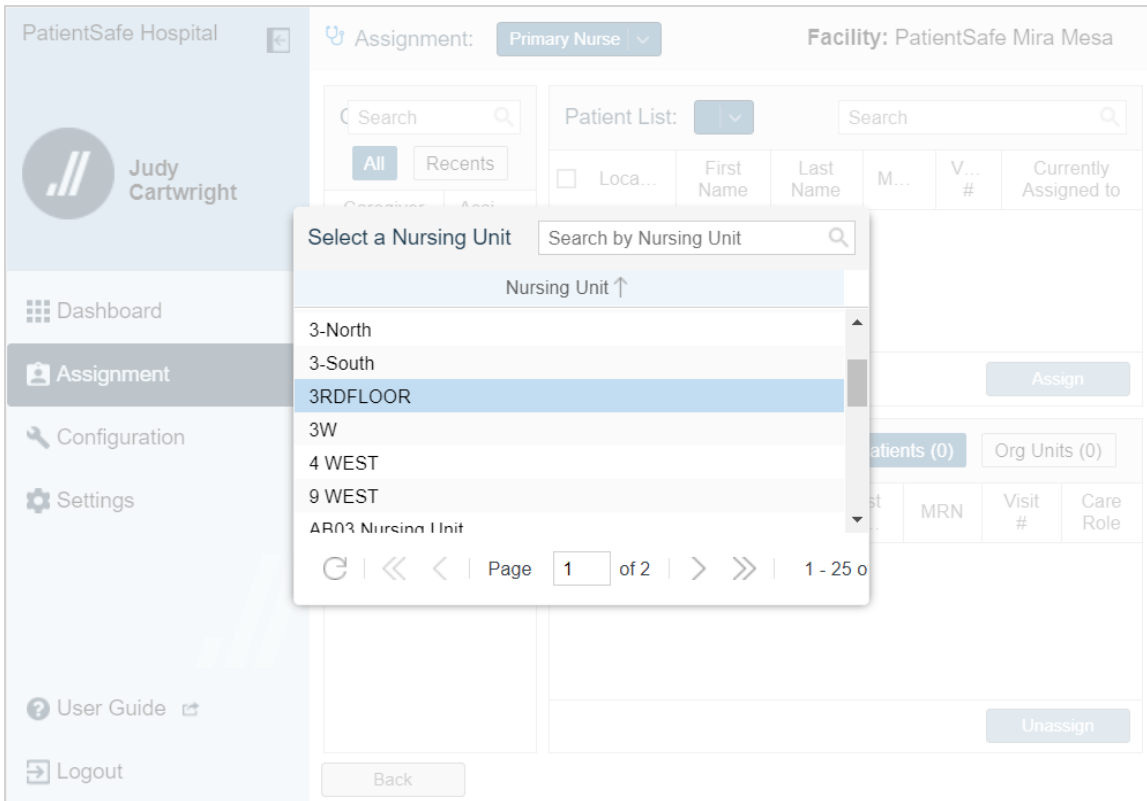
The screenshot displays the PatientSafe Hospital Enterprise Manager interface. The top navigation bar shows 'PatientSafe Hospital' and 'Dashboard'. The user profile for 'Judy Cartwright' is visible, along with a greeting: 'Hi Judy Cartwright! Good morning Monday, January 20, 2020'. The left sidebar contains navigation options: 'Dashboard', 'Assignment', 'Configuration', 'Settings', 'User Guide', and 'Logout'. The 'Assignment' menu is expanded, showing a 'Quick Links' section with three items: 'My Assignments', 'Assign Other Caregivers', and 'Patient List'. The 'Assign Other Caregivers' option is highlighted. The browser address bar at the bottom shows the URL: 'https://documentation-4x-test.qa.pss.net:8443/org-services-admin-web/#'.

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.

PatientSafe Hospital Assign... Facility: **PatientSafe Mira Mesa** Search by name or description

Name ↑	Assign To	Exclusive per Organization Unit or Patient	Exclusive per Caregiver	Description
On Call Oncologist	Facility	No	No	This is an oncolog...
On Call Orthopedics	Facility	No	No	This is an orthope...
On Call Physician	Nursing Unit	No	No	On Call Physician
OR nurse outside	Room <i>unknown</i>	No	No	This is a nurse th...
Pharmacist	Bed	Yes	No	This is a pharmaci...
Physician	Patient	Yes	No	This is the attendi...
Primary Nurse	Patient	Yes	No	
<i>Primary Nurse 2</i>	<i>Patient</i>	<i>No</i>	<i>No</i>	
Radiology On Call	Hospital S...	No	No	
Resident	Nursing Unit	No	No	This is a resident ...
Respiratory Thera...	Bed	No	No	This is the RT for ...
RN After-Hour	Team	Yes	Yes	
Satellite Pharmacist	Satellite	No	No	
Speech Therapist	Patient	No	No	This is the speech...
Team Nurse	Team	No	Yes	
Unit Phlebotomist	Nursing Unit	No	No	This is the phlebot...


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




The screenshot displays the 'Assignment' screen in the PatientTouch Enterprise Manager. The user is logged in as Judy Cartwright. The facility is PatientSafe Mira Mesa. The 'Assignment' dropdown is set to 'Primary Nurse'. A modal window titled 'Select a Nursing Unit' is open, showing a search field and a list of nursing units. The units listed are 3-North, 3-South, 3RDFLOOR (which is highlighted), 3W, 4 WEST, 9 WEST, and AR03 Nursing Unit. The modal also includes a pagination control showing 'Page 1 of 2' and '1 - 25 of' items. The background interface shows a 'Patient List' table with columns for 'Loca...', 'First Name', 'Last Name', 'M...', 'V... #', and 'Currently Assigned to'. There are 'Assign' and 'Unassign' buttons visible.

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.

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


 **Judy Cartwright**

Dashboard


Assignment

Configuration

Settings

User Guide 

Logout

Ca... 

All Recents

Caregiver	Assign...
Linda Aber...	1 patie...
Linda Barri...	

Back

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

<input type="checkbox"/>	Loc...	First Na...	Last Na...	M...	V... #	Currently Assigned to
<input type="checkbox"/>	200 1	Scott	Caan	M...	V...	Judy Cart
<input type="checkbox"/>	120 1	Clark	Kent	M...	V...	Judy Cart
<input type="checkbox"/>	111 1	Frank	Burns	M...	V...	Judy Cart
<input type="checkbox"/>	100 0	Em...	Pit...	M...	V...	Judy Cart

Assign

Current Assignments **Patients (0)** Org Units (0)

<input type="checkbox"/>	Lo...	N... Unit	Last N...	First N...	M...	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**.

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

Judy Cartwright

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Caregi... li

All Recents

Caregiver	Assignm...
Linda Abernathy	1 patient,...
Linda Barrington	

Patient List: Nursing Unit: 3RDFLOOR Search

<input type="checkbox"/>	Lo...	First N...	Last N...	M...	V... #	Currently Assigned to
<input checked="" type="checkbox"/>	20...	Scott	Ca...	M...	V...	Judy Ca
<input checked="" type="checkbox"/>	12...	Clark	Kent	M...	V...	Judy Ca
<input type="checkbox"/>	11...	Fr...	Bu...	M...	V...	Judy Ca
<input type="checkbox"/>	10...	F...	Pil...	M...	V...	Judy Ca

Assign 2 patient(s) to **Linda Abernathy:** **Assign**

Current Assignm... Patients (1) Org Units (1)

<input type="checkbox"/>	L...	N... Unit	Last N...	First N...	M...	Visit #	C... R...
<input type="checkbox"/>	1...	3...	J...	B...	M...	V...	Pr...

Unassign

Back

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

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

Judy Cartwright

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

li

All

C... A...

L... 3...

L...

L... 1...

Back

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

<input type="checkbox"/>	Location	First Name	Last Name	MRN	Visit #	Currently Assigned to
<input type="checkbox"/>	200 1	Scott	Caan	M11...	V1...	Linda Abernath
<input type="checkbox"/>	120 1	Clark	Kent	M1...	V1...	Linda Abernath
<input type="checkbox"/>	111 1	Frank	Burns	M1...	V1...	Judy Cartwright
<input type="checkbox"/>	122 3	Emma	Riley	M11...	V1...	Judy Cartwright

Assign

Current Assignments **Patients (3)** **Org Units (1)**

<input type="checkbox"/>	Loca...	Nurs... Unit	Last Name	First Name	MRN	Visit #	Care Role
<input type="checkbox"/>	121 1	3RD...	<i>Jacobs</i>	<i>Beth...</i>	<i>M10...</i>	<i>V100...</i>	<i>Prim...</i>
<input type="checkbox"/>	200 1	3RD...	Caan	Scott	M11...	V110...	Prim...
<input type="checkbox"/>	120 1	3RD...	Kent	Clark	M10...	V100...	Prim...

Unassign

- 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

Assign... Facility: University Hospital

Name ↑	Assign To	Exclusive per Organization Unit or Patient	Exclusive per Caregiver	Description
CARDIOLOGIST	Nursing Unit	No	No	
Case Manager	Patient	Yes	No	This is a case man...
Consulting Cardiolo...	Patient	No	No	This is a cardiologi...
Covering Cardiolo...	Facility	No	No	This is a cardiologi...
Neurologist	Nursing Unit	No	No	
On Call Neurologist	Facility	No	No	This is a neurologi...
Primary Nurse	Patient	Yes	No	
Primary Nurse 2	Patient	No	No	

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

PatientSafe Hospital

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

All Recents

Caregiver Assi...

Hanna ...

Patient List: Nursing Unit: 13 EAST

<input checked="" type="checkbox"/>	Loca...	First Name	Last Name	M...	V... #	Currently Assigned to
<input checked="" type="checkbox"/>	101 1	Tom	Jones	M...	V...	

Assign

Current Assignments Patients (0) Org Units (0)

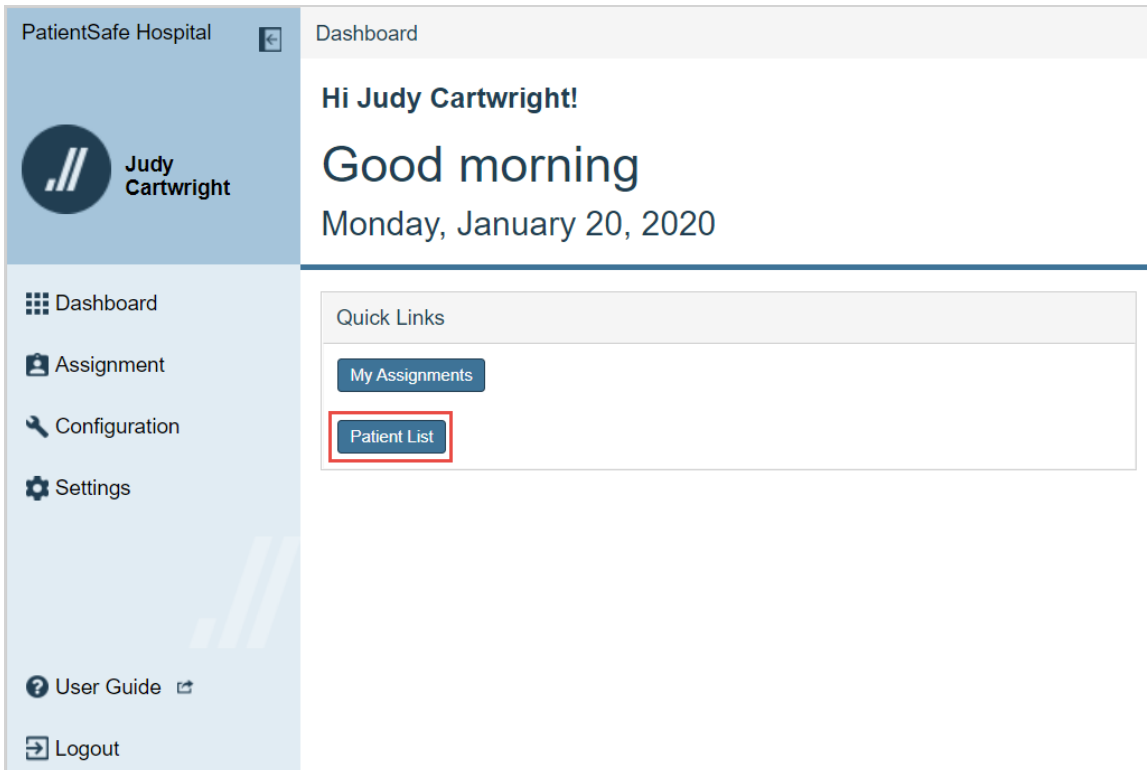
<input type="checkbox"/>	Lo...	Nur... Unit	Last Na...	First Na...	MRN	Visit #	Care Role
<input type="checkbox"/>							

Unassign

Back

Patient List

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







The screenshot shows the dashboard interface for Judy Cartwright. The top navigation bar includes "PatientSafe Hospital" and "Dashboard". The main header area displays a greeting: "Hi Judy Cartwright! Good morning Monday, January 20, 2020". On the left, a sidebar menu lists "Dashboard", "Assignment", "Configuration", "Settings", "User Guide", and "Logout". The "Quick Links" section on the right contains two buttons: "My Assignments" and "Patient List", with the latter being highlighted by a red rectangular box.








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






PatientSafe Hospital

Facility All Search in (all fields)

My Patients
 All Patients
 Show Inactive

Last Name	First Name	DOB	E...	M...	V... #	Facility Name	N... U...	Lo...	Details
Burns	Frank	09...		M...	V...	Pati...	3...	11...	
Riley	Emma	09...		M...	V...	Pati...	3...	12...	
Smith	Frank	09...		M...	V...	Pati...	3...	12...	
Henderson	Dwight	09...		M...	V...	Pati...	2...	11...	

 Dashboard
 Assignment
 Configuration
 Settings
 User Guide 
 Logout

 |
  |
  |
 Page of 1 |
  |
  |
 1 - 4 of 4

- To see patients within a specific facility select the facility from the drop down list. Or, select All to see patients in all facilities.
- 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

Facility Search in (all fields)

My Patients All Patients Show Inactive

Last Name	First Name	D...	E...	M...	V... #	Faci... Name	N... U...	L...	Details
Amy5	Amy5	0...	A...	A...	Pati...	3...	11...		
Amy5	Amy5	0...	A...	A...	Pati...	C...	11...		
Caan	Scott	0...	M...	V...	Pati...	3...	20...		
Kent	Clark	0...	M...	V...	Pati...	3...	12...		
Burns	Frank	0...	M...	V...	Pati...	3...	11...		
Riley	Emma	0...	M...	V...	Pati...	3...	12...		
Garoutte	Gloria	0...	M...	V...	Pati...	3...	12...		
Houlihan	Margaret	0...	M...	V...	Pati...	3...	12...		
Maloney	Sam	0...	M...	V...	Pati...	3...	12...		
Bernard	Andy	0...	M...	V...	Pati...	3...	1 1		
		0...	M...	V...	Pati...	3...	2 3		
balaguer	allison	0...	M...	V...	Pati...	3...	3 2		
Bradford	Tom	0...	M...	V...	Pati...	2...	10...		
Lockhart	Abby	0...	M...	V...	Pati...	2...	15...		
Simpson	Bart	1...	M...	V...	Pati...	3...	10...		
Somebody	Patient	0...	M...	V...	Pati...	3...	S1 1		

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- 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.
- 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.
- 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.
- 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
- User Guide
- Logout

Patient - Burns, Frank
←

Patient

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

Visit Information

Visit ID	MRN	Facility	A
V100006	M100006	PatientSafe ...	11/14

V100006 Details

Diagnoses:	Atherosclerosis	Location:	
Allergies:	Lipitor [1987-12-16]	Nursing Unit:	
Height:	172.7 cm (68 in)	Facility:	
Weight:	99.8 kg (220 lb)	BSA:	
Admitted:	2019-11-14	Discharged:	
Last Updated:	11/14/2019 12:07		

November 2019

S	M	T	W	T	F	S
27	28	29	30	31	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
1	2	3	4	5	6	7

Today

Back
Save

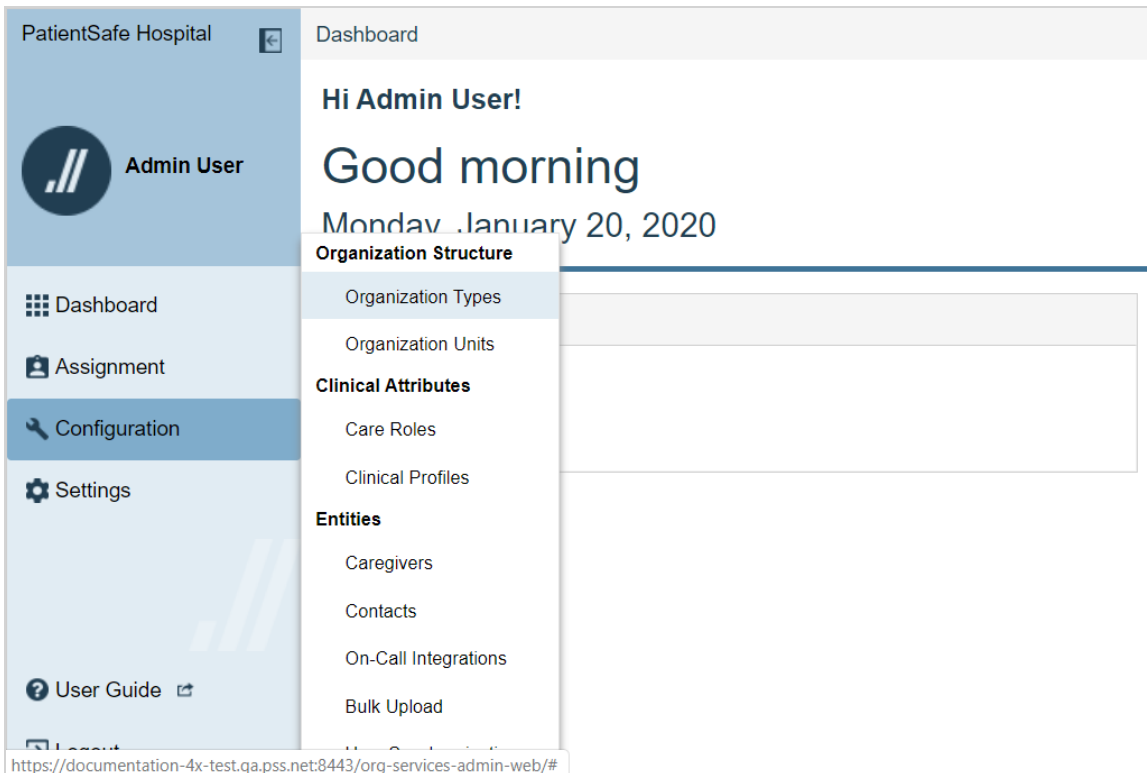
8. Click **Save** to save your changes.

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.



The screenshot shows the PatientSafe Hospital Admin User interface. The top navigation bar includes 'PatientSafe Hospital' and 'Dashboard'. The main content area displays a greeting: 'Hi Admin User! Good morning Monday, January 20, 2020'. A sidebar menu on the left contains 'Dashboard', 'Assignment', 'Configuration', 'Settings', and 'User Guide'. The 'Configuration' menu is expanded, showing a list of options: 'Organization Types', 'Organization Units', 'Clinical Attributes' (with sub-items 'Care Roles' and 'Clinical Profiles'), and 'Entities' (with sub-items 'Caregivers', 'Contacts', 'On-Call Integrations', and 'Bulk Upload'). The 'Organization Types' option is highlighted. The URL at the bottom of the browser window is <https://documentation-4x-test.qa.pss.net:8443/org-services-admin-web/#>.

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

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout


Organization Types


Name ↑	Description	Parents	Edit	Delete
> Crash Team				
∨ Facility				
∨ Floor	This is the floor of a hospital	⊕ 1		
> Nursing Unit		⊕ 6		
Hospital Service		⊕ 1		
∨ Nursing Unit		⊕ 6		
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		
Bed		⊕ 2		
∨ On Call List		⊕ 1		
> Nursing Unit		⊕ 6		
∨ Satellite		⊕ 1		
> Nursing Unit		⊕ 6		
> Team		⊕ 1		

Refresh
Create New

Creating A New Organization Unit Type

1. To create a new Organization Unit Type click **Create New**. In the example below, we will create a new "room."

PatientSafe Hospital  Organization Types


 Admin User

Dashboard

































Assignment

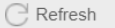
Configuration

Settings

User Guide 

Logout

Name ↑	Description	Parents	Edit	Delete
> Crash Team				
∨ Facility				
∨ Floor	This is the floor of a hospital	⊕ 1		
> Nursing Unit		⊕ 6		
Hospital Service		⊕ 1		
∨ Nursing Unit		⊕ 6		
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		
Bed		⊕ 2		
∨ On Call List		⊕ 1		
> Nursing Unit		⊕ 6		
∨ Satellite		⊕ 1		
> Nursing Unit		⊕ 6		
> Team		⊕ 1		

 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.

PatientSafe Hospital
Organization Type

Admin User

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

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	+
On Call List	+
Room	+
Satellite	+
Team	+

Allowed Children

✗

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

Organization Type

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Details

Name: Room

Description: This is a room in the facility.

Physical Location:

Parents: This organization unit type has no parents

Existing Organization Types

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

Allowed Children

Bed

Back Delete Save & Create New Save

Editing An Existing Organization Unit Type

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

PatientSafe Hospital

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Organization Types Search

Name ↑	Description	Parents	Edit	Delete
> Crash Team				
> Facility				
> Floor	This is the floor of a hospital	⊕ 1		
> Nursing Unit		⊕ 6		
> Bed		⊕ 2		
> ED Zones	This includes the zones in the Emergency Department.	⊕ 1		
> Room	This is a room for the facility.	⊕ 2		
> Bed		⊕ 2		
> Hospital Service		⊕ 1		
> Nursing Unit		⊕ 6		
> On Call List		⊕ 1		
> Satellite		⊕ 1		
> Team		⊕ 1		
> new type				

Refresh
Create New

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

PatientSafe Hospital

Organization Type

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Details

Name: Room

System Type: Room

Description: This is a room for the facility.

Physical Location:

Parents: ED Zones
Nursing Unit

Existing Organization Types

Hospital Service +

new type +

Allowed Children

Bed

Back Delete Save & Create New Save


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.

PatientSafe Hospital  Organization Types

 Admin User

Dashboard
Assignment
Configuration
Settings
User Guide 
Logout

Name ↑	Description	Parents	Edit	Delete
> Crash Team				
∨ Facility				
∨ Floor	This is the floor of a hospital	⊕ 1		
> Nursing Unit		⊕ 6		
Hospital Service		⊕ 1		
∨ Nursing Unit		⊕ 6		
Bed		⊕ 2		
> ED Zones	This includes the zones in the Emergency Department.	⊕ 1		
> Room	This is a room for the facility.	⊕ 2		
∨ On Call List		⊕ 1		
> Nursing Unit		⊕ 6		
∨ Satellite		⊕ 1		
> Nursing Unit		⊕ 6		
∨ Team		⊕ 1		
> Nursing Unit		⊕ 6		
new type				

 Refresh  Create New

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.

PatientSafe Hospital

Organization Type

Admin User

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

Details

Name:

Description:

Physical Location:

Parents: Facility

Existing Organization Types

Bed	+
Crash Team	+
ED Zones	+
Floor	+
new type	+
Nursing Unit	+
On Call List	+
Room	+
Satellite	+
Team	+

Allowed Children

Add allowed children from the Existing Organization Types list.

4. Click Yes or No on the confirmation message.

The screenshot displays the 'Organization Type' configuration page in the PatientSafe Hospital Enterprise Manager. The page is divided into a left sidebar with navigation options (Dashboard, Assignment, Configuration, Settings, User Guide, Logout) and a main content area. The main content area includes a 'Details' section with fields for 'Name' (Hospital Service), 'Description', and 'Physical Location'. To the right is a table of 'Existing Organization Types' with a '+' icon next to each entry. A 'Confirm' dialog box is overlaid on the page, asking for confirmation to delete the 'Hospital Service' organizational type. The dialog box has a question mark icon and two buttons: 'No' and 'Yes'. At the bottom of the page, there are buttons for 'Back', 'Delete', 'Save & Create New', and 'Save'.

Searching for Organization Unit Types

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

PatientSafe Hospital
Organization Types

Room

Name ↑	Description	Parents	Edit	Delete
> Crash Team				
∨ Facility				
> Floor	This is the floor of a hospital	⊕ 1		
Hospital Service		⊕ 1		
∨ Nursing Unit		⊕ 6		
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		
> On Call List		⊕ 1		
> Satellite		⊕ 1		
> Team		⊕ 1		
new type				

Refresh
Create New

Organization Units

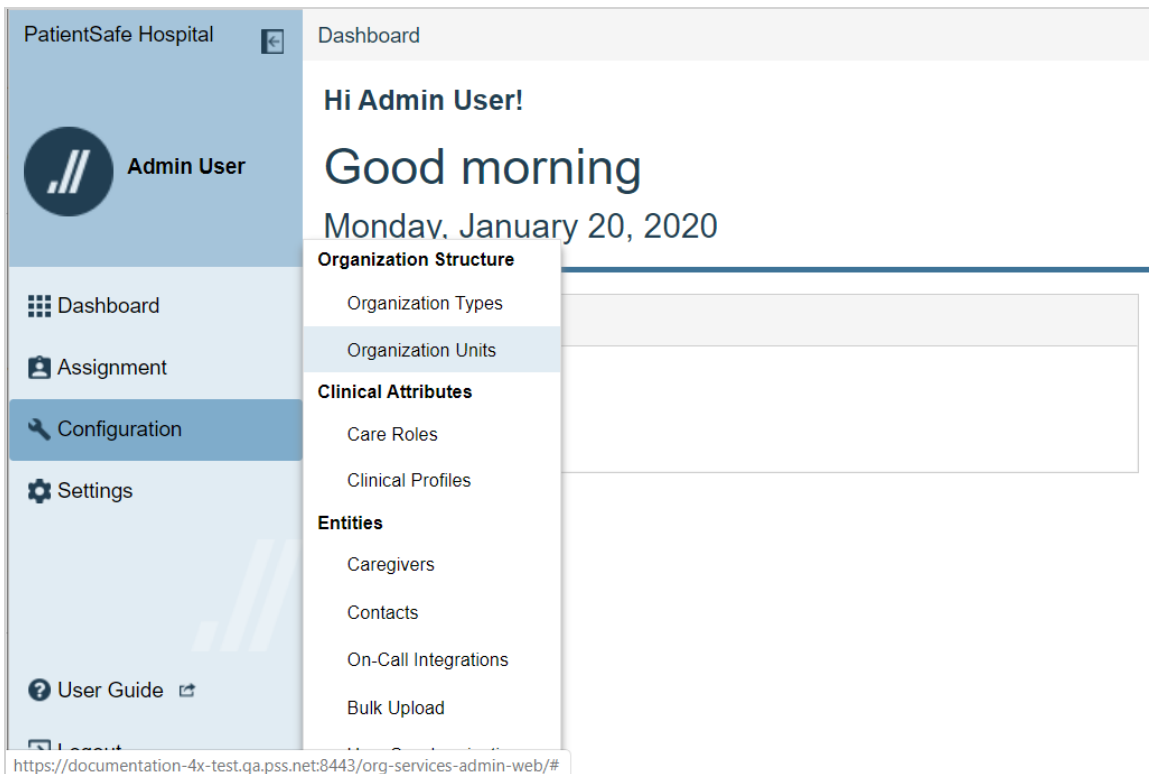
An Organization Unit is a physical representation of a type. So a type might be a facility and the unit would be a specific campus of the facility. Or, a type might be nursing unit and the Organization Unit would be the specific name of the unit, i.e. 3 West.

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.



The screenshot shows the PatientSafe Hospital Admin User interface. The top navigation bar includes "PatientSafe Hospital" and "Dashboard". The main content area displays a greeting: "Hi Admin User! Good morning Monday, January 20, 2020". A sidebar menu on the left contains "Dashboard", "Assignment", "Configuration", "Settings", and "User Guide". The "Configuration" menu is expanded, showing a list of options: "Organization Structure", "Organization Units", "Clinical Attributes", "Entities", "Care Roles", "Clinical Profiles", "Caregivers", "Contacts", "On-Call Integrations", and "Bulk Upload". The "Organization Units" option is highlighted. The URL at the bottom of the browser window is <https://documentation-4x-test.qa.pss.net:8443/org-services-admin-web/#>.

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.
3. 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	T...	F...	Parents	Children	Edit	Delete
PatientSafe Mira M...	This is the Mira Mesa ...	F...	P...		31		
PatientSafe Temecula	This is the Temecula f...	F...	P...		5		
PSS Carmel	Carmel Valley Facility	F...	P...		1		
PSS Irvine	Irvine Facility	F...	P...		1		
PSS Long Beach	Long Beach Facility	F...	P...		1		
PSS SD	San Diego Facility	F...	P...		2		
Test Expressway	Expressway Facility	F...	T...				
Testing Hospital	Testing	F...	T...		1		
University Hospital	This is the University ...	F...	U...		4		

- Drill down into each facility to see details, parents, and allowed children.

Note Inactive nursing units display in gray italic font.

The screenshot displays the 'Organization Unit: PatientSafe Mira Mesa' configuration page. The left sidebar contains navigation options: PatientSafe Hospital, Admin User, Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The main content area has tabs for 'Structure' and 'Contact'. The 'Details' section includes the following fields:

- Name: PatientSafe Mira Mesa
- Description: This is the Mira Mesa facility.
- Type: Facility
- Code: 92121
- Timezone: America/Los_Angeles (GMT-8)
- Display in Contact:
- Browse Group:

The 'Parents' section is a table with columns for Name, Type, Edit, and Re... It contains the text 'This organization unit has no parents' and an 'Add' button.

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

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

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

Name ↑	Description	Type	Facility	Par...	Children	Edit	Delete
PatientSafe Mira ...	This is the Mira...	Facility	Patient...		31		
PatientSafe Teme...	This is the Tem...	Facility	Patient...		5		
PSS Carmel	Carmel Valley ...	Facility	PSS C...		1		
PSS Irvine	Irvine Facility	Facility	PSS Irv...		1		
PSS Long Beach	Long Beach Fa...	Facility	PSS Lo...		1		
PSS SD	San Diego Faci...	Facility	PSS SD		2		
Test Expressway	Expressway Fa...	Facility	Test Ex...				
Testing Hospital	Testing	Facility	Testing ...		1		
University Hospital	This is the Univ...	Facility	Univers...		4		

Admin User

Dashboard

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Logout

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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 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

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

Organization Unit: 4 South

Structure
Contact

Name:

Description:

Type:

Code:

Facility:







Display in Contact

Browse Group:

Parents

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

Children

Name	Type	Edit	Re...
.4	Bed		
.5	Bed		
.6	Bed		

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.

PatientSafe Hospital

Organization Unit: 4 South

Structure **Contact**

Admin User

Dashboard

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Logout

Phone Numbers

Type	Number	Facility	Hidden	Delete
No associated phone numbers				
				Add

Email Addresses

Type	Address	Delete
No associated Email address		
		Add

Postal Addresses

Type	Address 1	Add... 2	City	State	ZIP code	Delete
No associated postal addresses						
						Add

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

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Organization Unit: 4 South

Structure **Contact**

Phone Numbers

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

Email Addresses

Type	Address	Delete
No associated Email address		

Postal Addresses

Type	Address 1	Add... 2	City	State	ZIP code	Delete
No associated Postal Address						

5. The new phone number has been added.

PatientSafe Hospital

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Organization Unit: 4 South

Structure **Contact**

Phone Numbers

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

Email Addresses

Type	Address	Delete
No associated Email address		

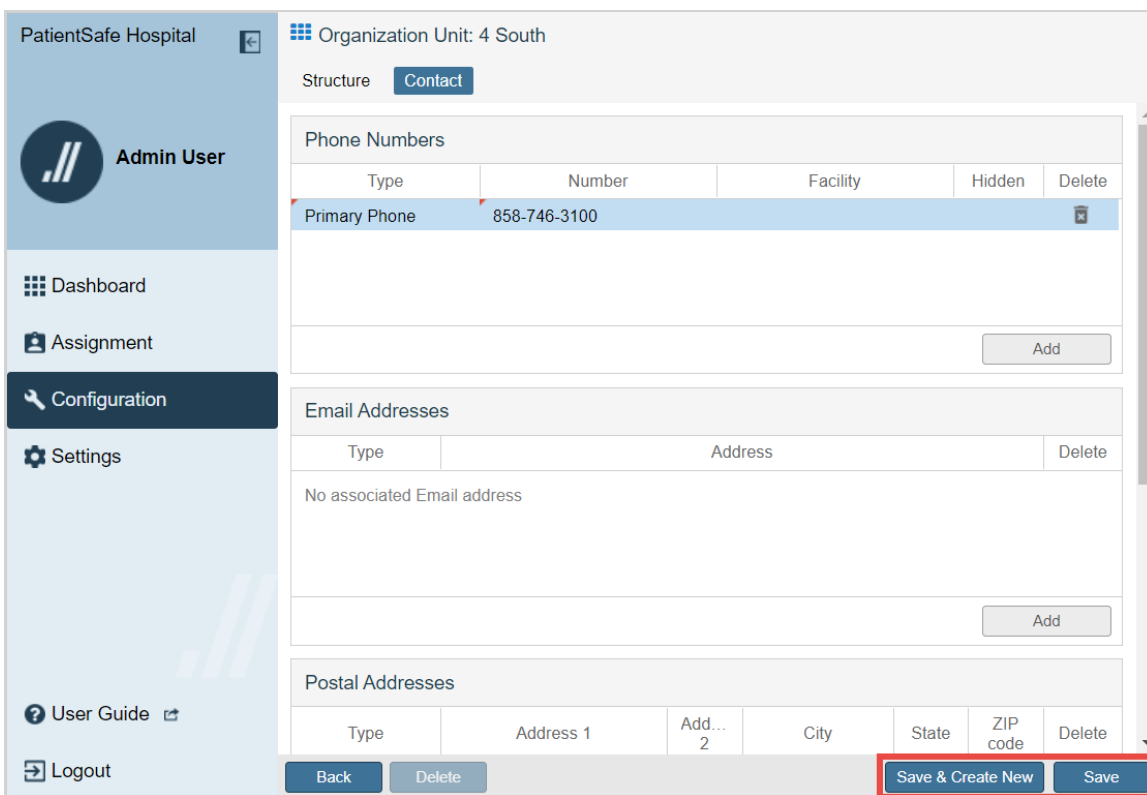
Postal Addresses

Type	Address 1	Add... 2	City	State	ZIP code	Delete
No associated Postal Address						

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

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.



PatientSafe Hospital Organization Unit: 4 South

Structure **Contact**

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Phone Numbers

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

Add

Email Addresses

Type	Address	Delete
No associated Email address		

Add

Postal Addresses

Type	Address 1	Add... 2	City	State	ZIP code	Delete
------	-----------	----------	------	-------	----------	--------

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.

PatientSafe Hospital

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

Name ↑	Description	Type	Facility	Par...	Children	Edit	Delete
PatientSafe Mira Mesa	This is the ...	Facility	Patie...		31		
PatientSafe Temecula	This is the ...	Facility	Patie...		5		
PSS Carmel	Carmel Vall...	Facility	PSS ...		1		
PSS Irvine	Irvine Facility	Facility	PSS ...		1		
PSS Long Beach	Long Beac...	Facility	PSS ...		1		
PSS SD	San Diego ...	Facility	PSS ...		2		
Test Expressway	Expresswa...	Facility	Test ...				
Testing Hospital	Testing	Facility	Testi...		1		
University Hospital	This is the ...	Facility	Univ...		4		

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Create New

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

PatientSafe Hospital

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Organization Unit: PatientSafe Mira Mesa

Structure Contact

Details

Name: PatientSafe Mira Mesa

Description: This is the Mira Mesa facility.

Type: Facility

Code: 92121

Timezone: America/Los_Angeles (GMT-8)


Display in Contact

Browse Group:

Parents

































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

3. Double-click on an active nursing unit.

PatientSafe Hospital  Organization Unit: PatientSafe Mira Mesa

Structure Contact

Children

Name	Type	Edit	Re...
1E (Inactive)	Nursing Unit		
1st Floor	Floor		
2-West	Nursing Unit		
3 South Satellite Pharmacy	Satellite		
3-South	Nursing Unit		
3.N (Inactive)	Nursing Unit		
3RDFLOOR	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		
Anesthesia	Team		
Anesthesia Assistant	Team		
Basement	Nursing Unit		

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

4. Click **Inactivate**.

PatientSafe Hospital

Organization Unit: 9 WEST

Structure Contact

Admin User

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Logout

Details

Name: 9 WEST

Description:

Type: Nursing Unit

Code: 9 WEST

Facility: PatientSafe Mira Mesa

Display in Contact

Browse Group:

Parents

Name	Type	Edit	Re...
PatientSafe Mira Mesa	Facility		

Add

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**.

PatientSafe Hospital

Organization Unit: 9 WEST

Structure Contact

Admin User

Dashboard
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Logout

Details

Name: 9 WEST

Description:

Type: Nursing Unit

Code: 9 WEST

Facility: PatientSafe Mira Mesa

Display in Contact
Browse Group:

Parents

Name	Type	Edit	Re...
PatientSafe Mira Mesa	Facility		

Add

Back Delete **Activate** Inactivated on: Nov 20, 2019 15:50 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

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


Name ↑	Description	Type	Facility	Parents	Children	Edit	Delete
3RDFLOOR		Nursi...	Univ...	1	1		
3-South	This is th...	Nursi...	Patie...	2	5		
3W		Nursi...	Univ...		1		
3W		Nursi...	Patie...	1	2		
3-West	This is th...	Nursi...	Patie...	1	4		
4 SOUTH		Nursi...	Patie...		3		
4 WEST		Nursi...	Patie...	1	1		
4-East	This is th...	Nursi...	Patie...	1	5		
4-West	This is th...	Nursi...	Patie...	1	5		
5-East	This is th...	Nursi...	Patie...	1	5		
5-West	This is th...	Nursi...	Patie...	1	4		
9 WEST		Nursi...	Patie...	1	4		
9-East		Nursi...	Testi...	1	2		
AB03 Nursing Unit	Nursing ...	Nursi...	Patie...	1	1		
AB04 Nursing Unit		Nursi...	Patie...	1	1		
AB05 Nursing Unit		Nursi...	Patie...				
AB06 Nursing Unit		Nursi...	Patie...		2		
Ariel NU 1		Nursi...	PSS ...	1	1		

Admin User


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

PatientSafe Hospital  Organization Unit: AB05 Nursing Unit

Structure Contact

 **Admin User**

- Dashboard
- Assignment
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User Guide 

Logout

Details

Name:

Description:

Type:

Code:

Facility:

Display in Contact

Browse Group:

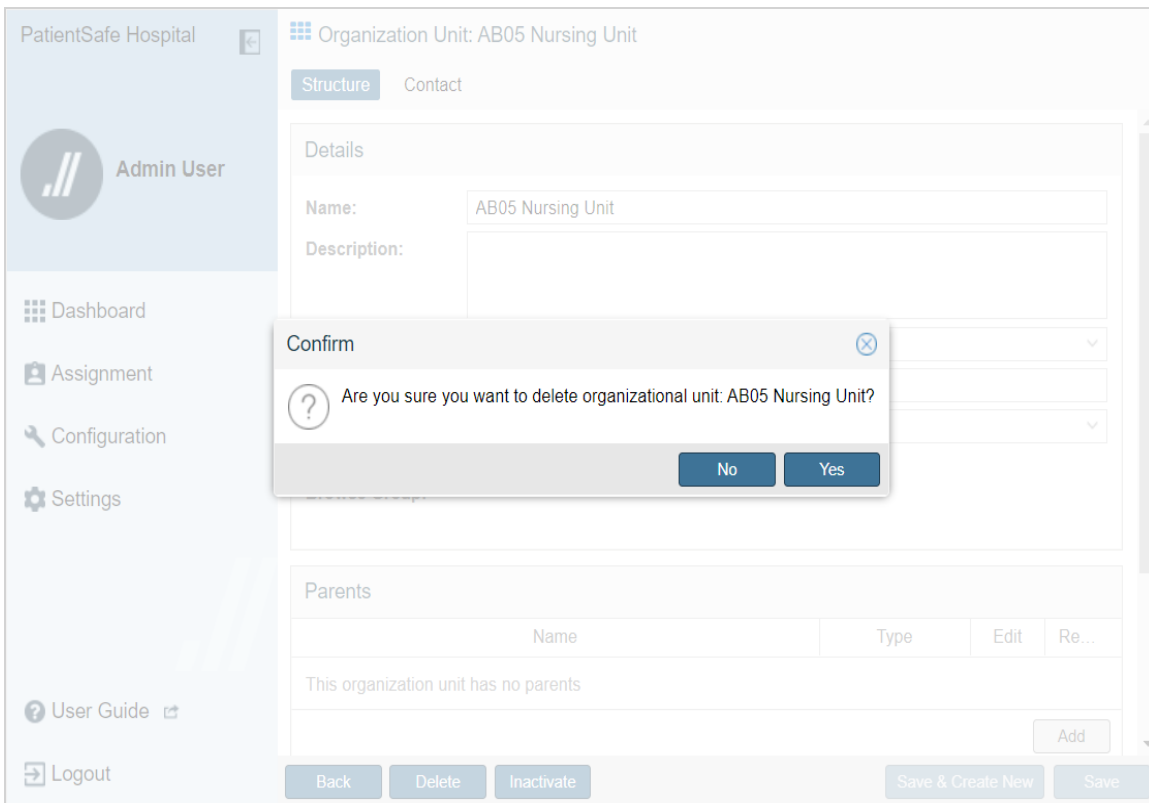
Parents

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

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.

PatientSafe Hospital

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Logout

Facility: All

Type(s): Facility

Search by name or description

Name	Type	Facility	Parents	Children	Edit	Delete
PatientSafe Mira Mesa	ility	PatientS...		31		
PatientSafe Temecula	ility	PatientS...		5		
PSS Carmel	ility	PSS Car...		1		
PSS Irvine	ility	PSS Irvine		1		
PSS Long Beach	ility	PSS Lon...		1		
PSS SD	ility	PSS SD		2		
Test Expressway	ility	PSS SD		2		
Testing Hospital	ility	Test Exp...				
Testing ...	ility	Testing ...		1		
University Hospital	ility	Testing ...		1		
Universit... This is the Un...	Facility	Universit...		4		

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Create New

Type

- 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.

PatientSafe Hospital

Admin User

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Facility: All Type(s): Facility, Nursing Ur

Search by name or description

Name ↑	Description	Type ↑	Children	Edit	Delete
Patient...	This is the M...	Facility	31		
Patient...	This is the T...	Facility	5		
PSS Ca...	Carmel Valle...	Facility	1		
PSS Irv...	Irvine Facility	Facility	1		
PSS Lo...	Long Beach ...	Facility	1		
PSS SD	San Diego F...	Facility	2		
Test Ex...	Expressway ...	Facility			
Testing ...	Testing	Facility	1		
Universi...	This is the U...	Facility	4		
10104		Nursing...	1		
10151		Nursing...	1		
13 EAST		Nursing...	1		
1E (Ina...		Nursing...	1		
1st floor	Long Beach ...	Nursing...	2		
2.W		Nursing...	1		
20101		Nursing...	1		
20102		Nursing...	1		
21016		Nursing...	1		

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Name

3. Click the **Search** field and search by type and name.

PatientSafe Hospital

Facility: All Type(s): Facility, Nursing Ur 4 SOUTH

Name ↑	Description	Type ↑	Facility	Parents	Children	Edit	Delete
4 SOUTH		Nursing ...	PatientS...		3		

Admin User

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Create New

Care Roles

A care role (i.e. Primary Nurse) is a title given to an Enterprise Manager user that describes the role of the user within the hospital and his/her relationship to a patient or org unit. Care roles in the Enterprise Manager describe what responsibilities the user will have in the Enterprise Manager as well as the Clinical Manager. A care role can be a physician, specialist (cardiologist), CNA, primary nurse, charge nurse, on-call cardiologist, phlebotomist, housekeeper, etc.

Any caregiver who will be working with patients must be assigned a care role. Care roles are assigned to patients or org units. For example, a care role (Primary Nurse) may be assigned to a patient. However, the Charge Nurse care role may be assigned to an entire floor (Org Unit).

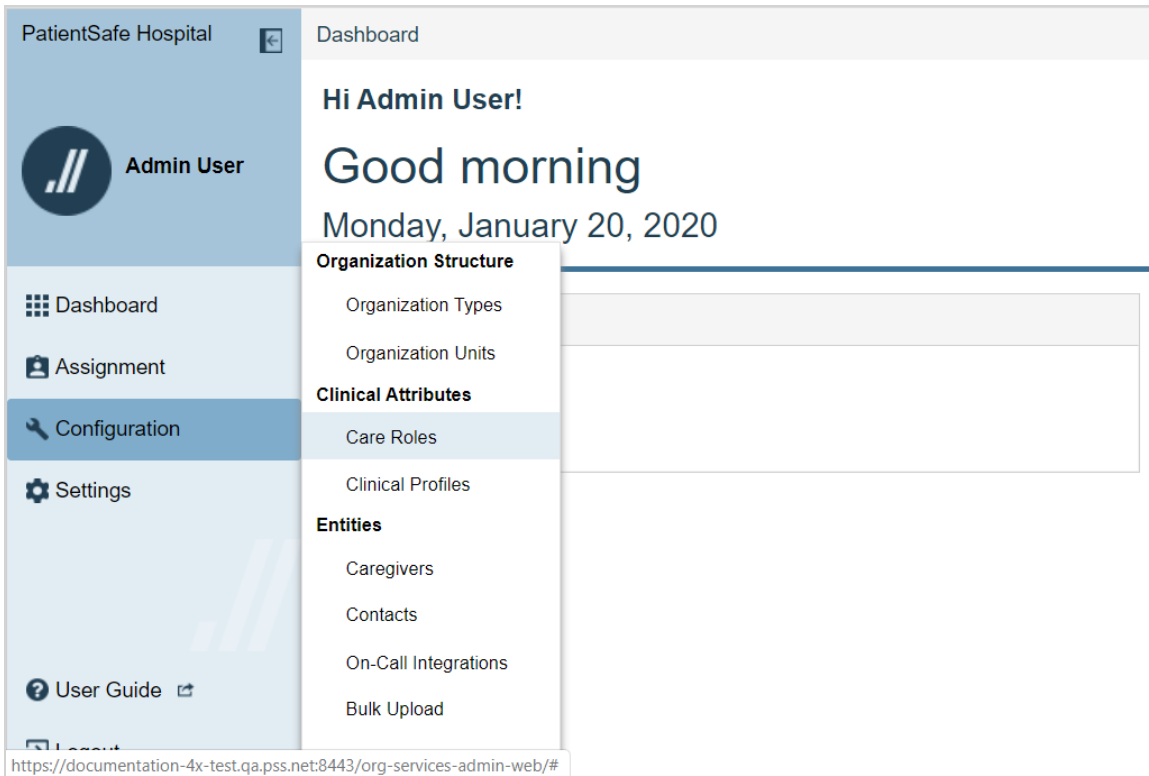
Care roles are associated to Enterprise Manager clinical profiles. One care role may have one or more associated clinical profiles, which would provide that user with a different set of permissions yet only have one care role. For example, a House Supervisor may be associated with two clinical profiles: House Supervisor and Floor Supervisor.

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.



PatientSafe Hospital

Dashboard

Hi Admin User!
Good morning
Monday, January 20, 2020

Organization Structure

- Organization Types
- Organization Units

Clinical Attributes

- Care Roles
- Clinical Profiles

Entities

- Caregivers
- Contacts
- On-Call Integrations
- Bulk Upload

Dashboard

Assignment


Configuration

Settings

User Guide

Logout

https://documentation-4x-test.qa.pss.net:8443/org-services-admin-web/#

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

PatientSafe Hospital
Care Roles
Search by name or description


Name ↑	Description	Assign To	Edit	Delete
Charge Nurse	This is a charge nur...	Nursing Unit		
CNA	This is a CNA for a ...	Bed		
Consulting Anesthesiologist	This is an Anesthes...	Patient		
Consulting Cardiologist	This is a cardiologis...	Patient		
Consulting Internal Med	This is an internal ...	Patient		
Consulting Neurologist	This is a neurologis...	Patient		
Consulting OBGYN	This is the consultin...	Patient		
Consulting Oncologist	This is an oncologis...	Patient		
Consulting Orthopedics	This is an orthopedi...	Patient		
Coumadin Pharmacist	This is the pharmac...	Patient		
Covering Anesthesiologist	This is an Anesthes...	Nursing Unit		
Covering Cardiologist	This is a cardiologis...	Facility		
Covering Internal Med	This is an internal ...	Nursing Unit		
Covering Neurologist	This is a neurologis...	Nursing Unit		
Covering OBGYN	This is an OBGYN ...	Nursing Unit		
Covering Oncologist	This is an oncologis...	Nursing Unit		
Covering Orthopedics	This is an orthopedi...	Nursing Unit		
Crash Team (role)		Crash Team		
Discharge Coordinator	This is a discharge	Nursing Unit		


Refresh
Care Role Order
Create New

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.

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

PatientSafe Hospital 


Admin User 

Dashboard

Assignment







































Configuration


Settings

User Guide 

Logout

Care Roles

Name ↑	Description	Assign To	Edit	Delete
Charge Nurse	This is a charge nur...	Nursing Unit		
CNA	This is a CNA for a ...	Bed		
Consulting Anesthesiologist	This is an Anesthes...	Patient		
Consulting Cardiologist	This is a cardiologis...	Patient		
Consulting Internal Med	This is an internal ...	Patient		
Consulting Neurologist	This is a neurologis...	Patient		
Consulting OBGYN	This is the consultin...	Patient		
Consulting Oncologist	This is an oncologis...	Patient		
Consulting Orthopedics	This is an orthopedi...	Patient		
Coumadin Pharmacist	This is the pharmac...	Patient		
Covering Anesthesiologist	This is an Anesthes...	Nursing Unit		
Covering Cardiologist	This is a cardiologis...	Facility		
Covering Internal Med	This is an internal ...	Nursing Unit		
Covering Neurologist	This is a neurologis...	Nursing Unit		
Covering OBGYN	This is an OBGYN ...	Nursing Unit		
Covering Oncologist	This is an oncologis...	Nursing Unit		
Covering Orthopedics	This is an orthopedi...	Nursing Unit		
Crash Team (role)		Crash Team		
Discharge Coordinator	This is a discharge	Nursing Unit		

Refresh 

Care Role Order **Create New**

Details

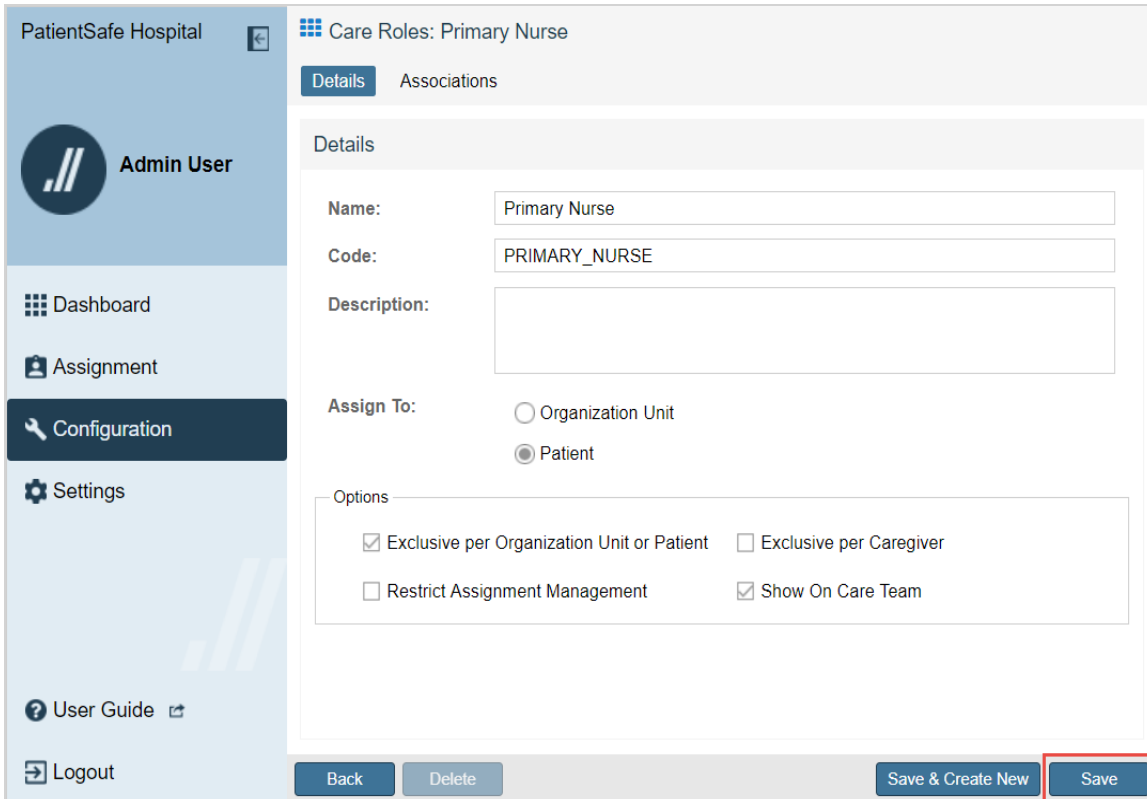
Complete the following fields:

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: Only displays when you select Assign To: Organization Unit. 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

Admin User

Dashboard

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Configuration

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Logout

Care Roles: Primary Nurse

Details Associations

Details

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**.

PatientSafe Hospital

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Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Care Roles: Primary Nurse

Details Associations

Associated Organization Units

Facility	Organization Unit	Organization Unit(s)
There are no default associations for this Care Role		

Edit

Back Delete Save & Create New Save

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


The screenshot shows the 'Edit Associated Organization Units' dialog box in the PatientTouch Enterprise Manager. The dialog is titled 'Edit Associated Organization Units' and is open over the 'Associations' tab for 'Care Roles: Primary Nurse'. The 'Org Unit Type' is set to 'Nursing Unit' and the 'Facility' is 'PatientSafe Mira Mesa'. A table lists various organization units with checkboxes. '2-West' and '3RDFLOOR' are selected. The 'Done' button is highlighted with a red box.


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 checked="" type="checkbox"/> 3RDFLOOR	3RDFLOOR
<input type="checkbox"/> 3-South	3-South
<input type="checkbox"/> 3W	3W







































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



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 Search by name or description 

Name ↑	Description	Assign To	Edit	Delete
Charge Nurse	This is a charge nur...	Nursing Unit		
CNA	This is a CNA for a ...	Bed		
Consulting Anesthesiologist	This is an Anesthes...	Patient		
Consulting Cardiologist	This is a cardiologis...	Patient		
Consulting Internal Med	This is an internal ...	Patient		
Consulting Neurologist	This is a neurologis...	Patient		
Consulting OBGYN	This is the consultin...	Patient		
Consulting Oncologist	This is an oncologis...	Patient		
Consulting Orthopedics	This is an orthopedi...	Patient		
Coumadin Pharmacist	This is the pharmac...	Patient		
Covering Anesthesiologist	This is an Anesthes...	Nursing Unit		
Covering Cardiologist	This is a cardiologis...	Facility		
Covering Internal Med	This is an internal ...	Nursing Unit		
Covering Neurologist	This is a neurologis...	Nursing Unit		
Covering OBGYN	This is an OBGYN ...	Nursing Unit		
Covering Oncologist	This is an oncologis...	Nursing Unit		
Covering Orthopedics	This is an orthopedi...	Nursing Unit		
Crash Team (role)		Crash Team		
Discharge Coordinator	This is a discharge ...	Nursing Unit		



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 PatientSafe Hospital interface. A modal window titled 'Care Role Order in Care Team / Contacts' is open, allowing users to drag and drop roles to arrange their order. The facility is set to 'PatientSafe Mira Mesa'. The roles listed include CNA, Consulting Anesthesiologist, Consulting Cardiologist, Consulting Internal Med, Consulting Neurologist, Consulting Oncologist, Consulting Orthopedics, Coumadin Pharmacist, Covering Cardiologist, and Covering Internal Med. The 'Save' button is highlighted.

Name ↑	Description	Assign To	Edit	Delete
Charge Nurse	This is a charge nur	Nursing Unit		
Crash Team (role)		Crash Team		
Discharge Coordinator	This is a discharge ...	Nursing Unit		

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.

PatientSafe Hospital
Care Roles
Search by name or description

Name ↑	Description	Assign To	Edit	Delete
Covering Orthopedics	This is an orthope...	Nursing Unit		
Crash Team (role)		Crash Team		
Discharge Coordinator	This is a discharg...	Nursing Unit		
ED Nurse	This is a nurse in t...	ED Zones		
ED Phlebotomist	This is a phleboto...	ED Zones		
ED RT	This is the respirat...	ED Zones		
Exclusive Unit Secretary		Nursing Unit		
Floor Manager	This is a nurse ma...	Floor		
Floor Phlebotomist	This is a phleboto...	Floor		
Floor Supervisor	This is a supervis...	Floor		
Fluff Nurse		Patient		
Hospitalist	This is the hospita...	Nursing Unit		
House Supervisor	This is a supervis...	Facility		
IT Administrator	This is an adminis...	Facility		
Janitor		Nursing Unit		
Lab Tech	This is the lab res...	Nursing Unit		
MD After-Hour		Team		
Neurologist		Nursing Unit		
No permission		Nursing Unit		

Refresh
Care Role Order
Create New

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

PatientSafe Hospital

Admin User

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Care Roles: Floor Manager

Details Associations

Details

Name: Floor Manager

Code: 9016

Description: This is a nurse manager/supervisor that is responsible for the entire floor.

Assign To: Organization Unit Patient

Unit Type: Floor

Options

Exclusive per Organization Unit or Patient Exclusive per Caregiver

Restrict Assignment Management Show On Care Team

Show Empty Locations


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.

PatientSafe Hospital 

Care Roles Search by name or description 

Name ↑	Description	Assign To	Edit	Delete
Charge Nurse	This is a cha...	Nursing Unit		
CNA	This is a CN...	Bed		
Consulting Anesthesiol...	This is an A...	Patient		
Consulting Cardiologist	This is a car...	Patient		
Consulting Internal Med	This is an int...	Patient		
Consulting Neurologist	This is a neu...	Patient		
Consulting OBGYN	This is the c...	Patient		
Consulting Oncologist	This is an on...	Patient		
Consulting Orthopedics	This is an or...	Patient		
Coumadin Pharmacist	This is the p...	Patient		
Covering Anesthesiol...	This is an A...	Nursing Unit		
Covering Cardiologist	This is a car...	Facility		
Covering Internal Med	This is an int...	Nursing Unit		
Covering Neurologist	This is a neu...	Nursing Unit		
Covering OBGYN	This is an O...	Nursing Unit		
Covering Oncologist	This is an on...	Nursing Unit		
Covering Orthopedics	This is an or...	Nursing Unit		
Crash Team (role)		Crash Team		


Admin User

Dashboard


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Logout

Refresh 

Care Role Order

Create New

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

The screenshot displays the 'Care Roles: CNA' configuration page in the PatientTouch Enterprise Manager. The interface includes a left-hand navigation menu with options: Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The main content area shows the 'Details' tab for the 'CNA' care role. The form fields are as follows:

- Name:** CNA
- Code:** CERTIFIED_NURSING_ASSISTANT
- Description:** This is a CNA for a location
- Assign To:** Organization Unit, Patient
- Unit Type:** Bed
- Options:**
 - Exclusive per Organization Unit or Patient
 - Exclusive per Caregiver
 - Restrict Assignment Management
 - Show On Care Team
 - Show Empty Locations

At the bottom of the form, there are four buttons: 'Back', 'Delete' (highlighted with a red box), 'Save & Create New', and 'Save'.

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

The screenshot displays the 'PatientSafe Hospital' interface. The left sidebar contains navigation options: Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The main content area is titled 'Care Roles: CNA' and has two tabs: 'Details' (selected) and 'Associations'. The 'Details' tab shows the following information:

- Name: CNA
- Code: CERTIFIED_NURSING_ASSISTANT
- Description: This is a CNA for a location
- Unit Type: Bed

A 'Confirm' dialog box is overlaid on the page, containing the text: 'Are you sure you want to delete care role: CNA?'. Below the text are two buttons: 'No' and 'Yes'. At the bottom of the main content area, there are buttons for 'Back', 'Delete', 'Save & Create New', and 'Save'.

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.

PatientSafe Hospital

Care Roles

Name ↑	Description	Assign To	Edit	Delete
CNA	This is a CNA f...	Bed		

Admin User

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

Refresh

Care Role Order Create New

Clinical Profiles

A clinical profile is a set of permissions given to users associated with that profile. The permissions allow users to perform certain functions in the Enterprise Manager, Clinical Manager, or PatientTouch. For example, a clinical profile may have the permission set of a physician, phlebotomist, primary nurse, etc. These permissions must map to the similar role in the Clinical Manager. This is done by the use of a clinical profile "code." It is this code that is mapped to roles in the Clinical Manager. For example, a clinical profile code of Primary Nurse would be mapped to the Staff Nurse role in the Clinical Manager.

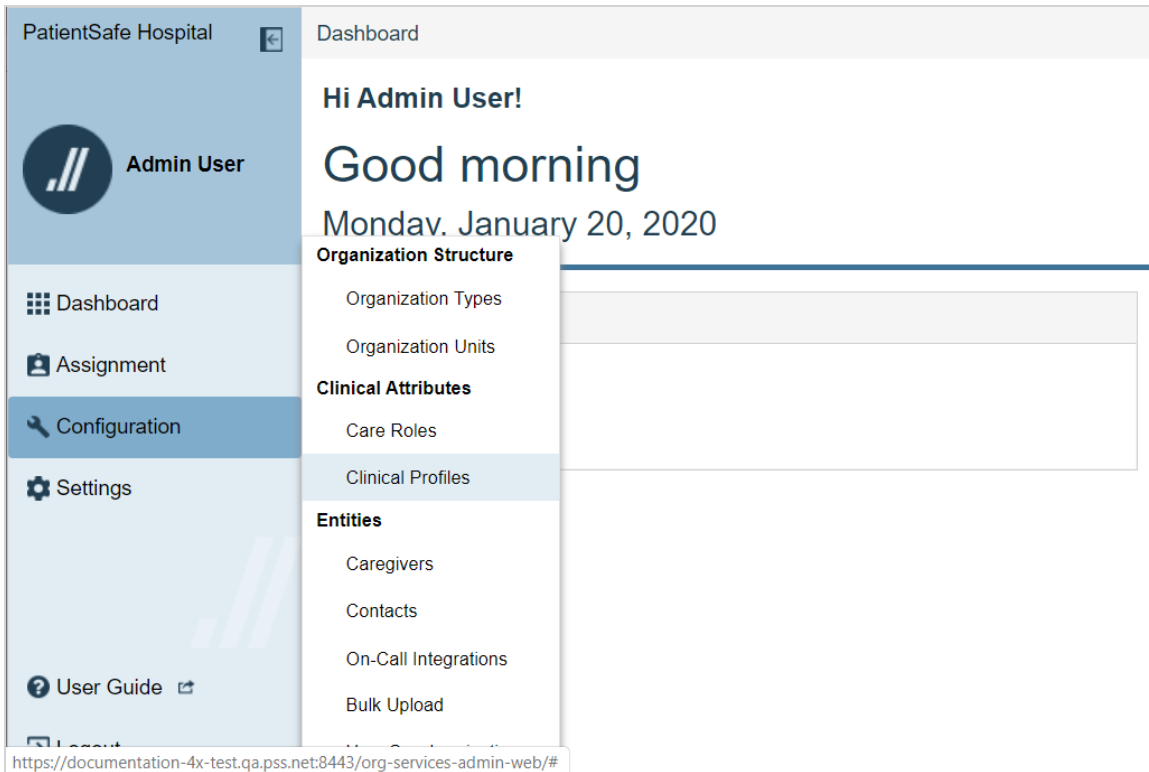
Clinical profiles are associated to Care Roles. Typically, there is a 1:1 relationship between care roles and clinical profiles. For example, a Primary Nurse care role will typically have a Primary Nurse clinical profile. However, users may have one care role but multiple associated clinical profiles.

For example, the table below provides clinical profiles matched to care roles and assignments.

Clinical Profile	Care Role(s)	Assigned To
Physician	Physician	Patient
	MD After Hour	Org Unit
Phlebotomist	Unit Phlebotomist	Org Unit
	ED Phlebotomist	Org Unit
Primary Nurse	Primary Nurse	Patient
	ED Nurse	Org Unit
	Crash Team	Org Unit

Viewing Existing Clinical Profiles

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



PatientSafe Hospital

Admin User

Dashboard

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Dashboard

Hi Admin User!

Good morning

Monday, January 20, 2020

Organization Structure

- Organization Types
- Organization Units


Clinical Attributes

- Care Roles
- Clinical Profiles

Entities

- Caregivers
- Contacts
- On-Call Integrations
- Bulk Upload

https://documentation-4x-test.qa.pss.net:8443/org-services-admin-web/#

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

Name ↑	Clinical Role Type	Description	Edit	Delete
Floor Manager	Registered N...			
Fluff RN	Registered N...			
Hospitalist	Doctor of Me...	This is a physician serving the ho...		
House Supervisor	Other	This is the supervisor for the entir...		
Internal Medicine	Doctor of Me...	This is a physician with the intern...		
IT Admin	Other	This is an Admin resource in the i...		
Janitor	Other			
Lab Tech	Laboratory Aid	Lab Tech		
Neurology	Doctor of Me...	This is a physician with the neuro...		
No Permission	Other			
Nursing Administr...	Anesthesiolo...	Nursing Administration Group - H...		
OBGYN	Doctor of Me...	This is a physician with the OBG...		
On Call Physician	Doctor of Me...			
Oncologist	Doctor of Me...	This is a physician with the oncol...		
OR Nurse	Registered N...			
Orthopedics	Doctor of Me...	This is a physician with the ortho...		
outside	Registered N...			
Pharmacist	Registered P...	This is a registered pharmacist		
Pharmacy Manager	Other			

Refresh
Create New

Admin User

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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**.

PatientSafe Hospital 

Clinical Profiles Search by name or description 

Name ↑	Clinical Role Type	Description	Edit	Delete
Floor Manager	Registered N...			
Fluff RN	Registered N...			
Hospitalist	Doctor of Me...	This is a physician serving the ho...		
House Supervisor	Other	This is the supervisor for the entir...		
Internal Medicine	Doctor of Me...	This is a physician with the intern...		
IT Admin	Other	This is an Admin resource in the i...		
Janitor	Other			
Lab Tech	Laboratory Aid	Lab Tech		
Neurology	Doctor of Me...	This is a physician with the neuro...		
No Permission	Other			
Nursing Administr...	Anesthesiolo...	Nursing Administration Group - H...		
OBGYN	Doctor of Me...	This is a physician with the OBG...		
On Call Physician	Doctor of Me...			
Oncologist	Doctor of Me...	This is a physician with the oncol...		
OR Nurse	Registered N...			
Orthopedics	Doctor of Me...	This is a physician with the ortho...		
outside	Registered N...			
Pharmacist	Registered P...	This is a registered pharmacist		
Pharmacy Manager	Other			



Create New

Details

Complete the following fields:

1. Name (required)
2. Clinical Role Type (required): Select a Clinical Role Type from the drop down menu. 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.

PatientSafe Hospital

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Clinical Profiles: Primary Nurse

Details Care Roles Permissions App Link Launch Points

Clinical Profile Information

Name: Primary Nurse

Clinical Role Type: Registered Nurse

Code: PRIMARY_NURSE

Description: Primary Nurse

Affiliated Facilities

Facility ↑ Remove

No affiliated facilities.

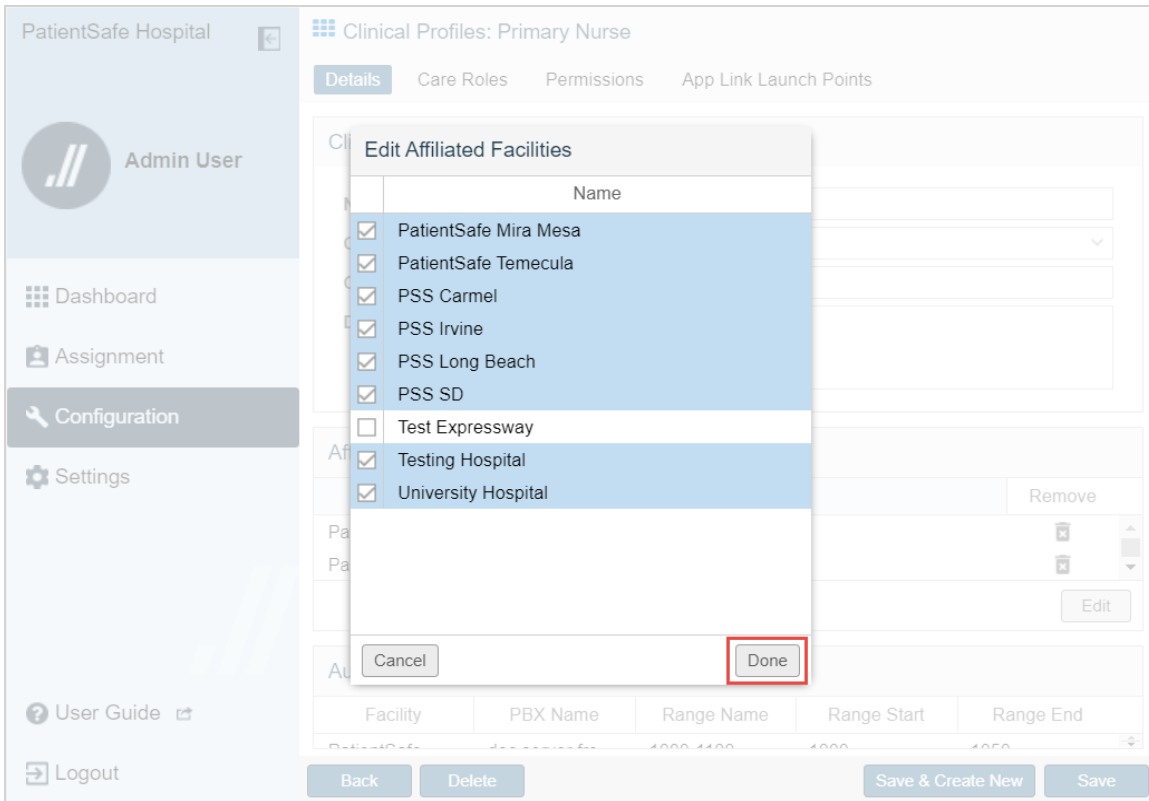
Edit

Auto Provisioning Extension Ranges

Facility	PBX Name	Range Name	Range Start	Range End
----------	----------	------------	-------------	-----------

Back Delete Save & Create New Save

6. Select one or more associated facilities.
7. Click **Done**.





The screenshot shows the 'Clinical Profiles: Primary Nurse' configuration page. A modal dialog titled 'Edit Affiliated Facilities' is open, displaying a list of facilities with checkboxes. The 'Done' button at the bottom right of the dialog is highlighted with a red box. The background interface includes a sidebar with 'Admin User', 'Dashboard', 'Assignment', 'Configuration', and 'Settings'. The main content area shows tabs for 'Details', 'Care Roles', 'Permissions', and 'App Link Launch Points'. Below the dialog, a table with columns 'Facility', 'PBX Name', 'Range Name', 'Range Start', and 'Range End' is partially visible.


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 to make any modifications.


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 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: PRIMARY_NURSE


Description: Primary Nurse


Affiliated Facilities

Facility ↑ Remove

PatientSafe Mira Mesa 

PatientSafe Temecula 

PSS Carmel 

 Edit

Auto Provisioning Extension Ranges

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

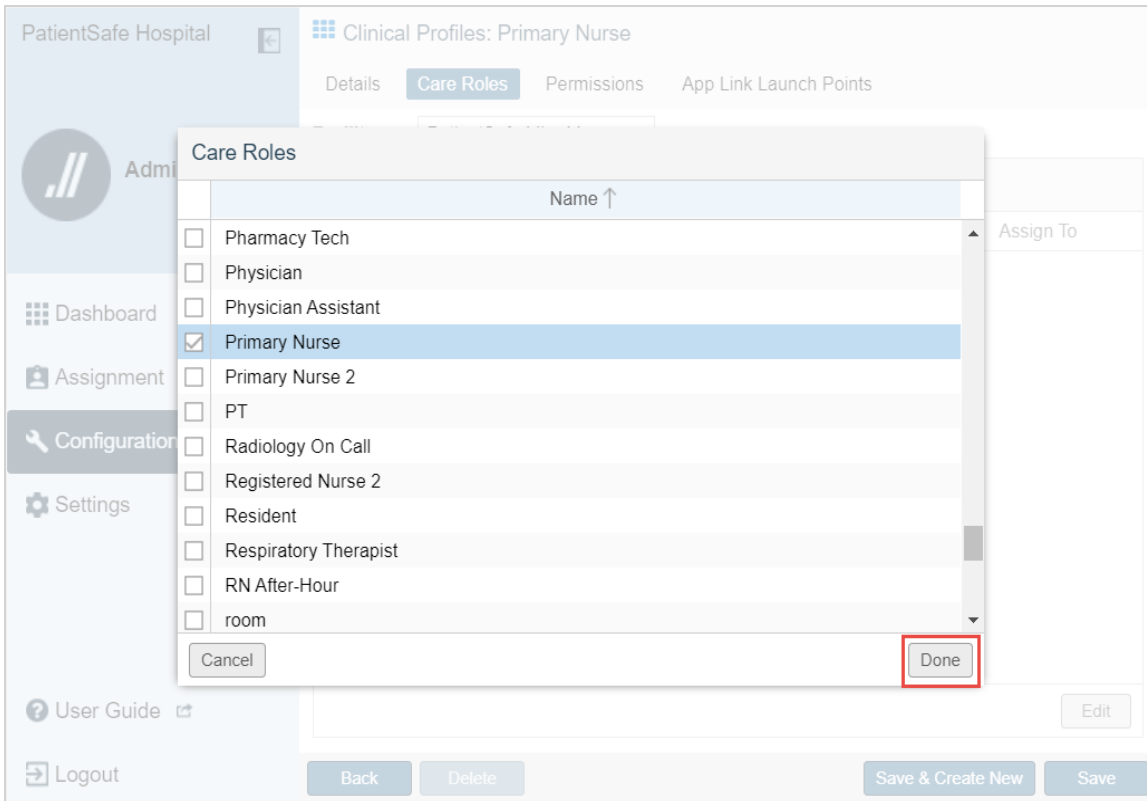
Back Delete Save & Create New Save

Care Roles

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

The screenshot displays the 'Clinical Profiles: Primary Nurse' configuration page in the PatientTouch Enterprise Manager. The interface includes a left sidebar with navigation options: Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The main content area shows the 'Care Roles' tab selected. A 'Facility' dropdown menu is open, listing several hospitals, with 'PatientSafe Mira Mesa' highlighted. Below the dropdown is a table with columns for 'Care Role', 'Name', 'Description', and 'Assign To'. The table currently shows 'No associated' entries. At the bottom right of the table area, an 'Edit' button is highlighted with a red box. At the bottom of the page, there are buttons for 'Back', 'Delete', 'Save & Create New', and 'Save'.

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



Permissions

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

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Clinical Profiles: Primary Nurse

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

Facility: PatientSafe Mira Mesa

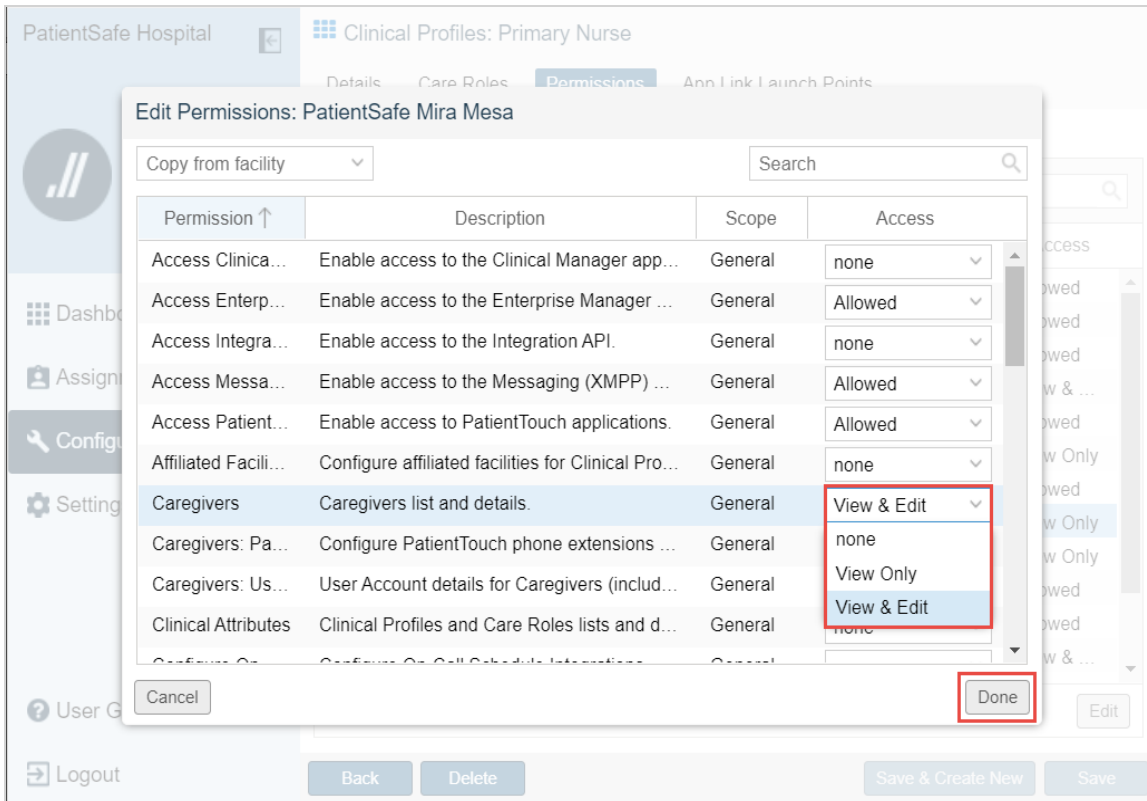
Search

Permission ↑	Description	Scope	Access
No permissions configured.			

Back Delete Save & Create New Save

Edit

- 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.
- Select the **Access** drop down menu and choose Allowed, View Only, or View & Edit.
- Click **Done** when you are finished.



PatientSafe Hospital Clinical Profiles: Primary Nurse
 Details Care Roles **Permissions** App Link Launch Points

Edit Permissions: PatientSafe Mira Mesa
 Copy from facility Search

Permission ↑	Description	Scope	Access
Access Clinica...	Enable access to the Clinical Manager app...	General	none
Access Enterp...	Enable access to the Enterprise Manager ...	General	Allowed
Access Integra...	Enable access to the Integration API.	General	none
Access Messa...	Enable access to the Messaging (XMPP) ...	General	Allowed
Access Patient...	Enable access to PatientTouch applications.	General	Allowed
Affiliated Facili...	Configure affiliated facilities for Clinical Pro...	General	none
Caregivers	Caregivers list and details.	General	View & Edit
Caregivers: Pa...	Configure PatientTouch phone extensions ...	General	none
Caregivers: Us...	User Account details for Caregivers (includ...	General	View Only
Clinical Attributes	Clinical Profiles and Care Roles lists and d...	General	View & Edit
Configure On...	Configure On-Call Schedule Interactions	General	none

Cancel Done Edit

Back Delete Save & Create New Save

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 has configured this feature (Enterprise Manager>Settings>App Link Launch Points) clinical profiles will be assigned App Link Launch Points and Epic Haiku or Rover buttons will display in the designated locations on the PatientTouch application.

1. Click **App Link Launch Points**.

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.

Use the list below to locate where the buttons will be for each Type:

- Patient : patient-info screen and patient-context screen (individual patient)
- Patient List : assignments/unit-browse screens
- User : contact-detail screen (individual contact)

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


The screenshot shows the 'App Link Launch Points' configuration screen for 'Clinical Profiles: Primary Nurse'. The interface includes a left sidebar with navigation options: Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The main content area shows the 'App Link Launch Points' table for the facility 'PatientSafe Mira Mesa'. The table has three columns: Name, Description, and Type. The first row is highlighted with a red border.


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


Buttons at the bottom include Back, Delete, Save & Create New, and Save. An Edit button is located at the bottom right of the table area.


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


PatientSafe Hospital


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App Link Launch Point

Details








Name:

Link: (Supported variables: \$patientmnrn and \$username)

Description:


Type:


Available To (Clinical Profiles)


Clinical Profile ↑	Facilities	Remove
Pharmacy Manager	PatientSafe Mira Mesa	
Physical Therapy	PatientSafe Mira Mesa	
Physician	PatientSafe Mira Mesa	
Primary Nurse	PatientSafe Mira Mesa	
Radiology	PatientSafe Mira Mesa	
Registered Nurse	PatientSafe Mira Mesa	
Respiratory Therapist	PatientSafe Mira Mesa	


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.


PatientSafe Hospital 



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Clinical Profiles: Primary Nurse

Details Care Roles Permissions App Link Launch Points

Clinical Profile Information



Name: Primary Nurse

Clinical Role Type: Registered Nurse

Code: PRIMARY_NURSE

Description: Primary Nurse

Affiliated Facilities

Facility ↑	Remove
PatientSafe Mira Mesa	
	


Auto Provisioning Extension Ranges

Facility	PBX Name	Range Name	Range Start	Range End
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







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



Editing Clinical Profiles

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

PatientSafe Hospital 

Clinical Profiles

Name ↑	Clinical Role Type	Description	Edit	Delete
outside	Registered N...			
Pharmacist	Registered P...	This is a registered pharmacist		
Pharmacy Manager	Other			
Phlebotomist	Certified Phl...	This is a phlebotomist user		
Physical Therapy	Physical The...	This is a certified physical therapist		
Physician	Doctor of Me...	Doctor		
Primary Nurse	Registered N...	Primary Nurse		
Primary Nurse 2	Registered N...			
Radiology	Other			
Registered Nurse	Registered N...	This is a clinician with an RN deg...		
Resident Physician	Doctor of Me...	This is a physician in resident pr...		
Respiratory Therapist	Respiratory T...	This is a certified respiratory ther...		
SD Nurse	Doctor of Me...			
Speech Therapy	Speech-Lang...	This is a certified speech therapist		
Team Nurse	Registered N...			
Transport	Transport	This is a transport technician in t...		
Unit Secretary	Other	This is the unit secretary for the ...		
VSTestCareProfile1	Registered N...			



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3. Edit any of the Details, Care Roles, Permissions, or App Link Launch Points tabs.
4. Click **Save** when you are done.

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Clinical Profiles: Primary Nurse

[Details](#)
[Care Roles](#)
[Permissions](#)
[App Link Launch Points](#)

Clinical Profile Information

Name:

Clinical Role Type:

Code:

Description:

Affiliated Facilities

Facility ↑	Remove
PatientSafe Mira Mesa	Remove
<input type="button" value="Edit"/>	


Auto Provisioning Extension Ranges

Facility	PBX Name	Range Name	Range Start	Range End





































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.

PatientSafe Hospital 

Clinical Profiles

Name ↑	Clinical Role Type	Description	Edit	Delete
outside	Registered N...			
Pharmacist	Registered P...	This is a registered pharmacist		
Pharmacy Manager	Other			
Phlebotomist	Certified Phl...	This is a phlebotomist user		
Physical Therapy	Physical The...	This is a certified physical therapist		
Physician	Doctor of Me...	Doctor		
Primary Nurse	Registered N...	Primary Nurse		
Primary Nurse 2	Registered N...			
Radiology	Other			
Registered Nurse	Registered N...	This is a clinician with an RN deg...		
Resident Physician	Doctor of Me...	This is a physician in resident pr...		
Respiratory Therapist	Respiratory T...	This is a certified respiratory ther...		
SD Nurse	Doctor of Me...			
Speech Therapy	Speech-Lang...	This is a certified speech therapist		
Team Nurse	Registered N...			
Transport	Transport	This is a transport technician in t...		
Unit Secretary	Other	This is the unit secretary for the ...		
VSTestCareProfile1	Registered N...			



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

The screenshot displays the 'Clinical Profiles: Primary Nurse' configuration page in the PatientTouch Enterprise Manager. The interface includes a sidebar on the left with navigation options: PatientSafe Hospital, Admin User, Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The main content area is titled 'Clinical Profiles: Primary Nurse' and has tabs for Details, Care Roles, Permissions, and App Link Launch Points. The 'Details' tab is active, showing 'Clinical Profile Information' with the following fields: Name (Primary Nurse), Clinical Role Type (Registered Nurse), Code (PRIMARY_NURSE), and Description (Primary Nurse). Below this is a table for 'Affiliated Facilities' with one entry: PatientSafe Mira Mesa. At the bottom, there are buttons for Back, Delete (highlighted with a red box), Save & Create New, and Save. The 'Auto Provisioning Extension Ranges' table is currently empty.

Facility	PBX Name	Range Name	Range Start	Range End
----------	----------	------------	-------------	-----------

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.

PatientSafe Hospital

Care Roles

Name ↑	Description	Assign To	Edit	Delete
Primary Nurse		Patient		
Primary Nurse 2		Patient		

Admin User

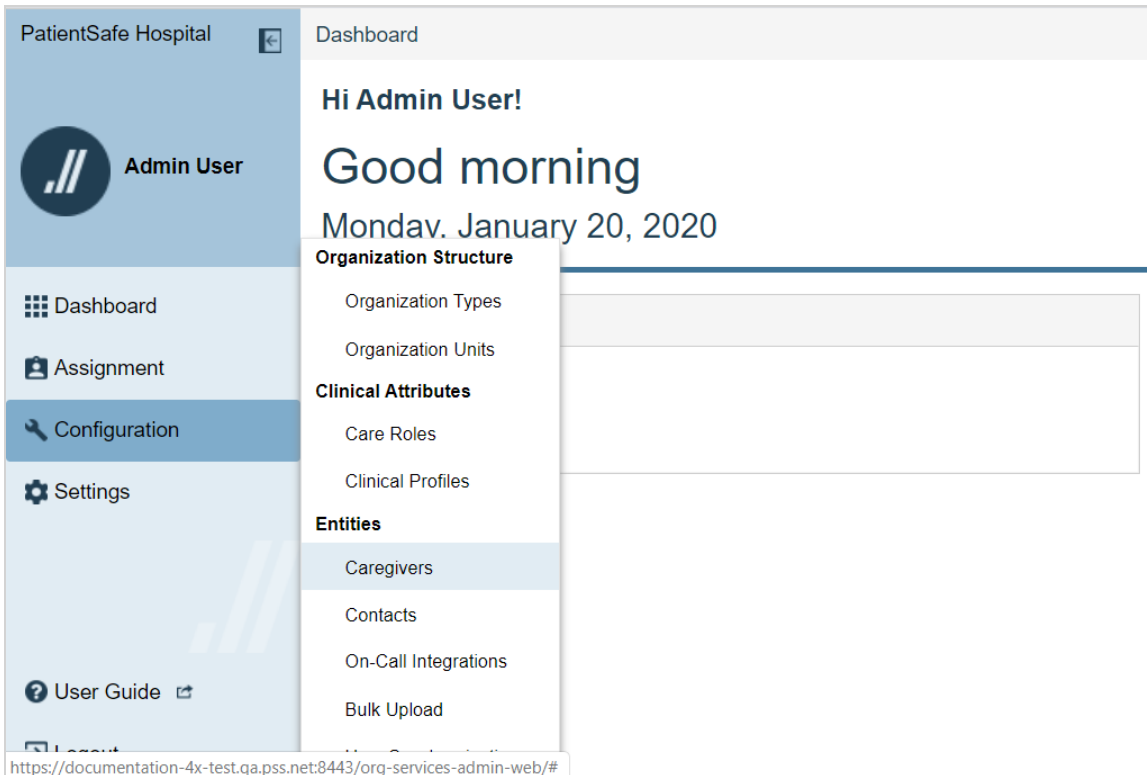
- Dashboard
- Assignment
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Refresh Care Role Order Create New



Caregivers

Viewing Existing Caregivers


1. From the Dashboard, click **Configuration>Caregivers**.



2. 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.
3. 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.
4. 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 view inactivated caregivers.
5. 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  Caregivers Facility: All 

Admin User

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Show Options

- Show inactivated Caregivers
- Show User Accounts only
- Show system users

Username	Badge ID	PatientTouch ID	Edit	Delete
paardema	1127	paardema@q...		
Aardva... Sherry Case...	saardvarch 1125	saardvarch@...		
Aaron Sally ED N...	saaron 1126	saaron@qa.p...		
Ababa Darle... Pedi...	dababa 1129	dababa@qa.p...		
Abaca Rodn... Neur...	rabaca 1130	rabaca@qa.p...		
Abba Mary Regi...	mabba 1128	mabba@qa.p...		
Abbey Daniel Anes...	dabbey 1131	dabbey@qa.p...		
Abel David Tran...	dabel 1124	dabel@qa.pss...		
Abercr... Rodri... Anes...	rabercro... 1133	rabercrombie...		
Aberdeen Shelly Certif...	saberdeen 1114	saberdeen@q...		
Aberna... Linda Regi...	labernathy 1113	labernathy@q...		
Abindale Mike Cardi...	mabindale 1115	mabindale@q...		
Abirnith Keith Anes...	kabirnith 1110	kabirnith@qa...		
Able Paul Surg...	pable 1123	pable@qa.pss...		
Abney Steve Surg...	sabney 1132	sabney@qa.p...		
Abundy Malc... Phle...	mabundy 1116	mabundy@qa...		
Addams Jane LSW	jaddams jadd...			
Adiron... Mitch IT Dir...	madirond... 1117	madirondack...		
Affernuff Robert Phys...	raffernuth 1121	raffernuth@qa...		

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Create New Caregiver

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

PatientSafe Hospital

Caregivers Facility:

Show Options

Last Name ↑	First Name	Job Title	Username	Badge ID	PatientTouch ID	Edit	Delete
Aardema	Peter	Float...	paardema	1127	paardema@q...		
Aardva...	Sherry	Case...	saardvarch	1125	saardvarch@...		
Aaron	Sally	ED N...	saaron	1126	saaron@qa.p...		
Ababa	Darle...	Pedi...	dababa	1129	dababa@qa.p...		
Abaca	Rodn...	Neur...	rabaca	1130	rabaca@qa.p...		
Abba	Mary	Regi...	mabba	1128	mabba@qa.p...		
Abbey	Daniel	Anes...	dabbey	1131	dabbey@qa.p...		
Abel	David	Tran...	dabel	1124	dabel@qa.pss...		
Abercr...	Rodri...	Anes...	rabercro...	1133	rabercrombie...		
Aberdeen	Shelly	Certif...	saberdeen	1114	saberdeen@q...		
Aberna...	Linda	Regi...	labernathy	1113	labernathy@q...		
Abindale	Mike	Cardi...	mabindale	1115	mabindale@q...		
Abirnith	Keith	Anes...	kabirnith	1110	kabirnith@qa...		
Able	Paul	Surg...	pable	1123	pable@qa.pss...		
Abney	Steve	Surg...	sabney	1132	sabney@qa.p...		
Abundv	Malc...	Phle...	mabundv	1116	mabundv@qa...		

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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.

ID Type	Identifier	Facility	Remove
No additional ids set.			
<input type="button" value="Add"/> <input type="button" value="Edit"/>			

System	Type	Facility	Value
cerner	accessgroup	PatientSafe Mir...	Staff Nurse

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

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Caregiver

Details Contact Associations User Account Permissions

Caregiver Information

First Name: Brenda Middle Initial:

Last Name: Middleton Signature Initials:

Job Title: Credentials: RN

Department:

Company Name:

Profile Photo

Choose Photo...

Remove Photo

Additional IDs

ID Type	Identifier	Facility	Remove
No additional ids set.			

Add Edit

Affiliated Facilities

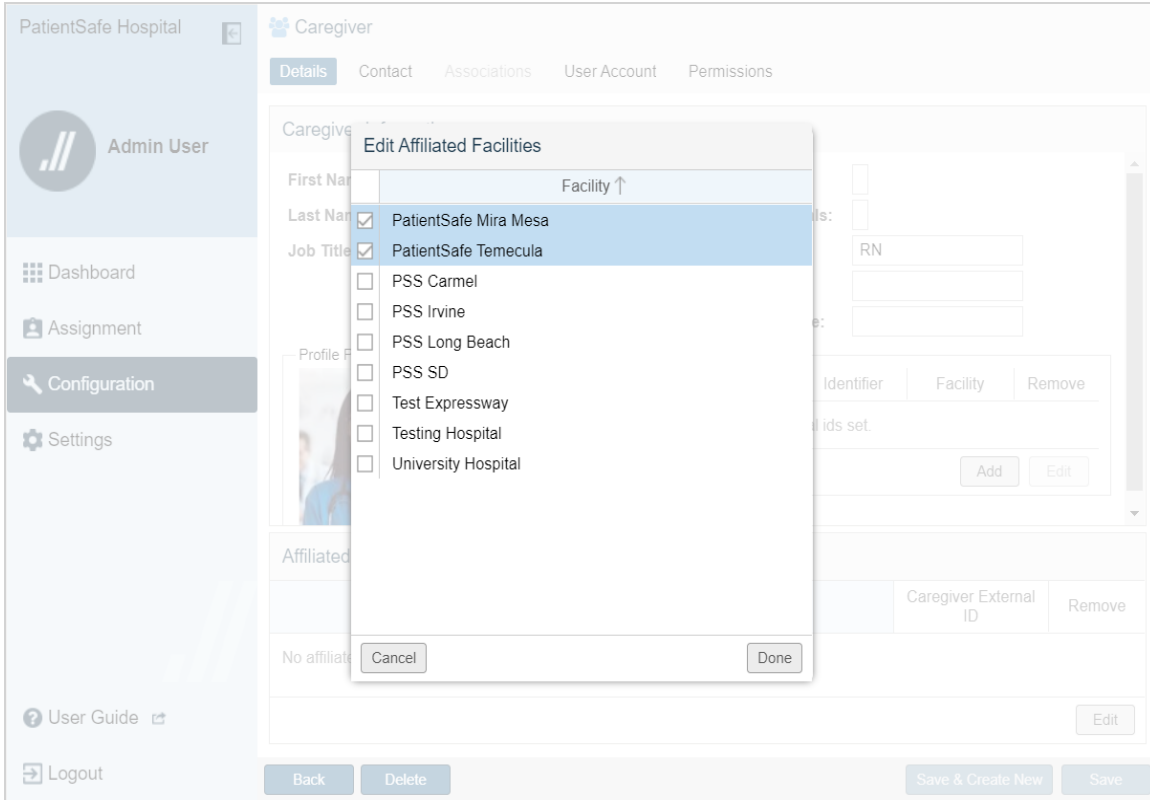
Facility ↑	Caregiver External ID	Remove
No affiliated facilities.		

Edit

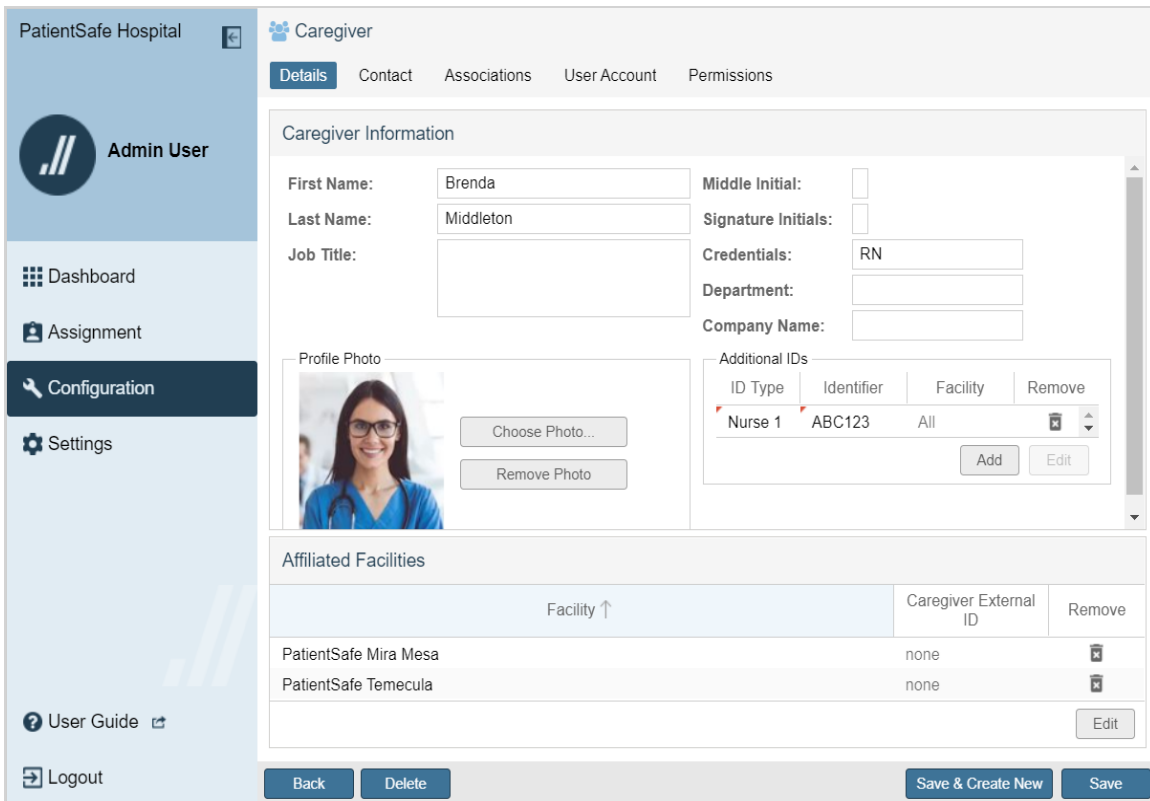
Back Delete Save & Create New Save

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.

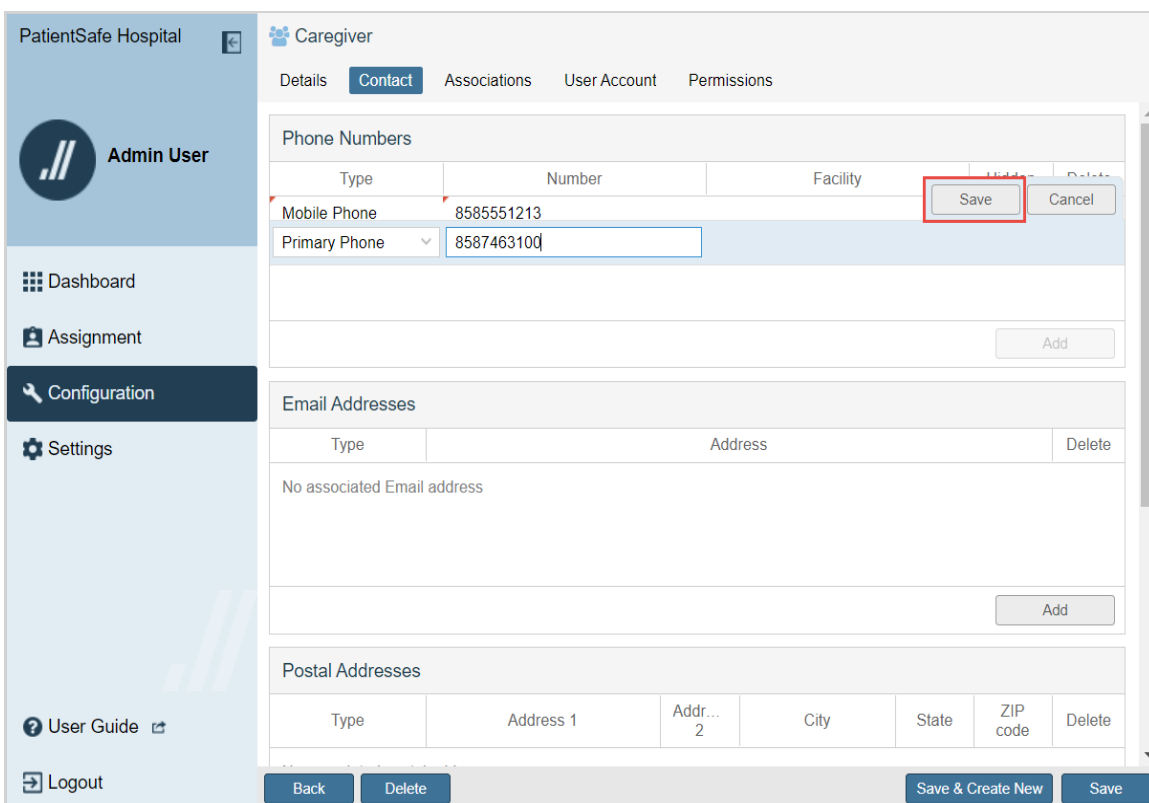


Note The **Caregiver External ID** is from an integrated system like Active Directory or an EMR/ADT system. When you select the affiliated facility, the external ID field is automatically populated (if applicable).

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. Click **Save**.



PatientSafe Hospital

Caregiver

Details **Contact** Associations User Account Permissions

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Phone Numbers

Type	Number	Facility	Edit	Delete
Mobile Phone	8585551213		Save	Cancel
Primary Phone	8587463100			

Add

Email Addresses

Type	Address	Delete
No associated Email address		

Add

Postal Addresses

Type	Address 1	Addr... 2	City	State	ZIP code	Delete
------	-----------	-----------	------	-------	----------	--------

Back Delete 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.

PatientSafe Hospital

Caregiver

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)
No Associated Org Units of selected type	

Edit

Back Delete Save & Create New Save

Admin User

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

The screenshot displays the PatientTouch Enterprise Manager interface. The top navigation bar includes "PatientSafe Hospital", "Caregiver", and tabs for "Details", "Contact", "Associations", "User Account", and "Permissions". The left sidebar contains navigation options: "Admin", "Dashboard", "Assignment", "Configuration", "Settings", "User Guide", and "Logout". The main content area shows a "Clinical Profiles" dialog box with a table of profiles. The "Primary Nurse" profile is selected, and the "Done" button is highlighted with a red box.

	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	Edit
<input checked="" type="checkbox"/>	Primary Nurse	Primary Nurse	
<input type="checkbox"/>	Radiology		Unit
<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		Edit


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

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

PatientSafe Hospital 


Caregiver


Details Contact **Associations** User Account Permissions

Facility: PatientSafe Mira Mesa 


Associated Clinical Profiles





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




Associated Org Units Org Unit Type: Nursing Unit 

Org Unit	Source(s)
No Associated Org Units of selected type	



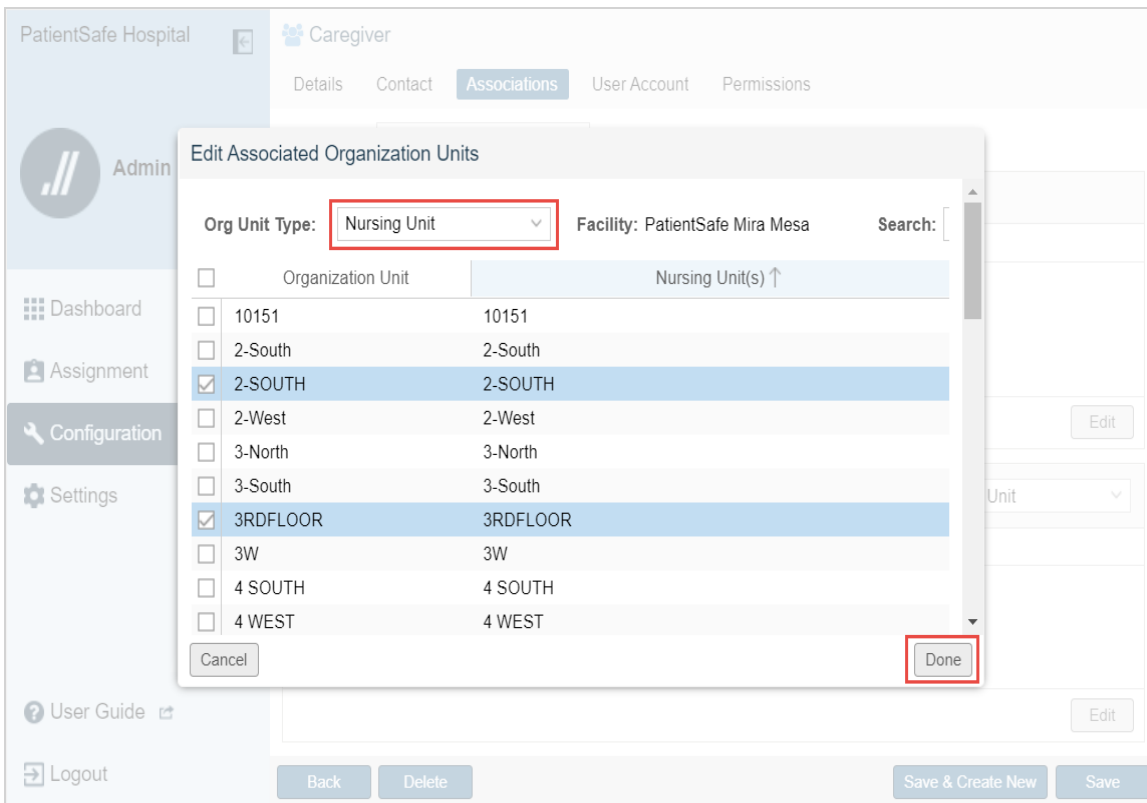





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6. Select the desired Nursing Units.

Note Ensure the proper Org Unit Type is selected at the top of the screen.

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



PatientSafe Hospital Caregiver

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Back Delete Save & Create New Save

Edit Associated Organization Units

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

<input type="checkbox"/>	Organization Unit	Nursing Unit(s) ↑
<input type="checkbox"/>	10151	10151
<input type="checkbox"/>	2-South	2-South
<input checked="" type="checkbox"/>	2-SOUTH	2-SOUTH
<input type="checkbox"/>	2-West	2-West
<input type="checkbox"/>	3-North	3-North
<input type="checkbox"/>	3-South	3-South
<input checked="" type="checkbox"/>	3RDFLOOR	3RDFLOOR
<input type="checkbox"/>	3W	3W
<input type="checkbox"/>	4 SOUTH	4 SOUTH
<input type="checkbox"/>	4 WEST	4 WEST

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.

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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

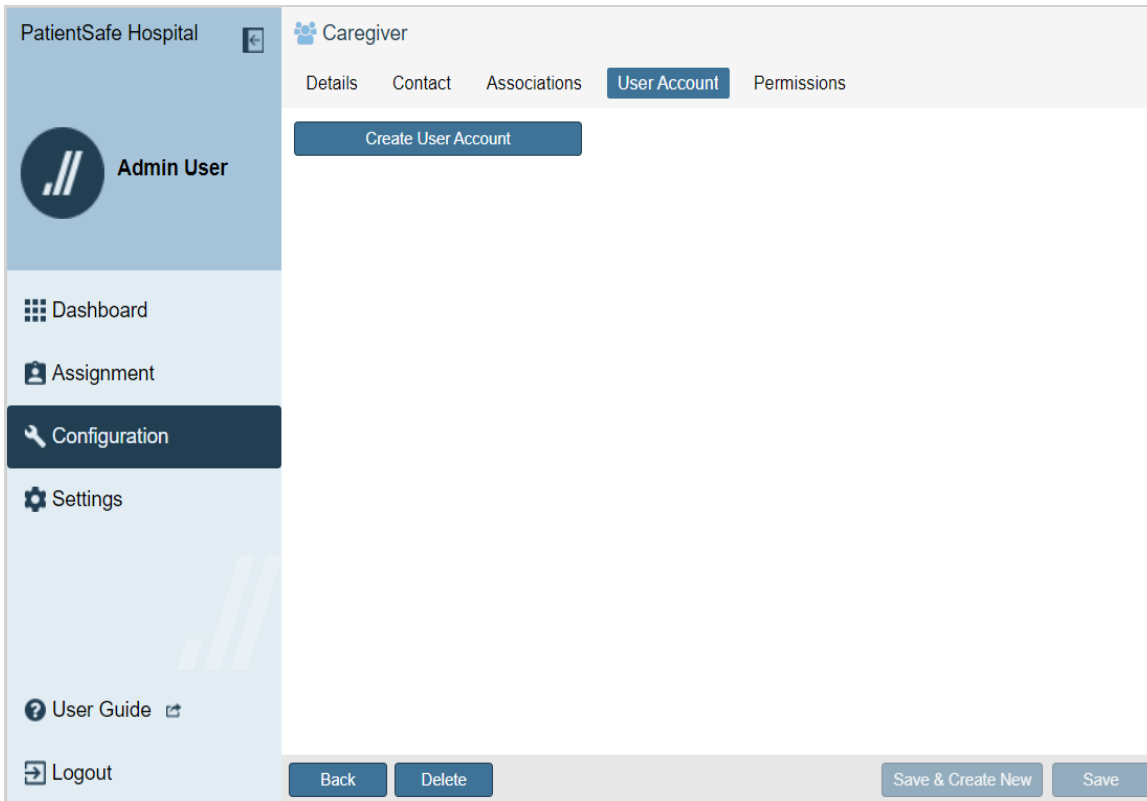
Edit

Back Delete Inactivate Save & Create New Save

User Account

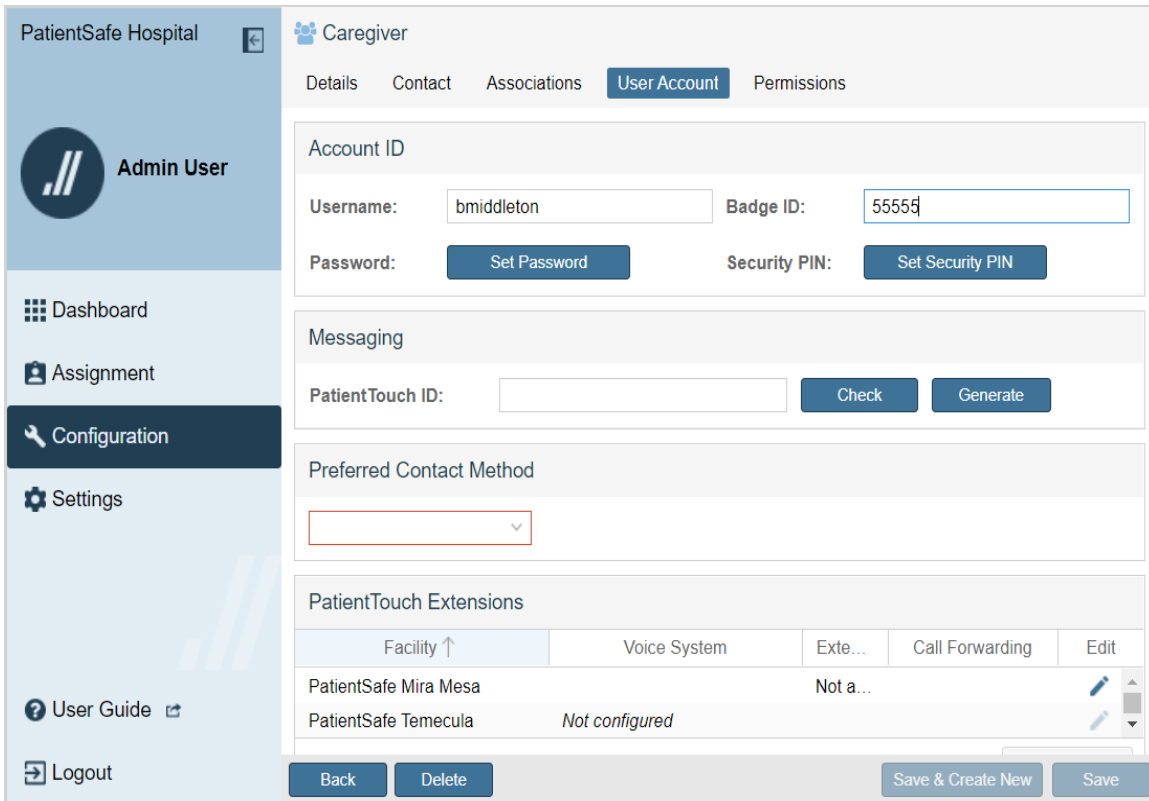
Use the User Account tab to set up a user name, password, pin, and messaging ID.

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.



PatientSafe Hospital ☰ Caregiver

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		Not a...		<input type="button" value="Edit"/>
PatientSafe Temecula	Not configured			<input type="button" value="Edit"/>

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.

Click **Done** when you are finished.

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:

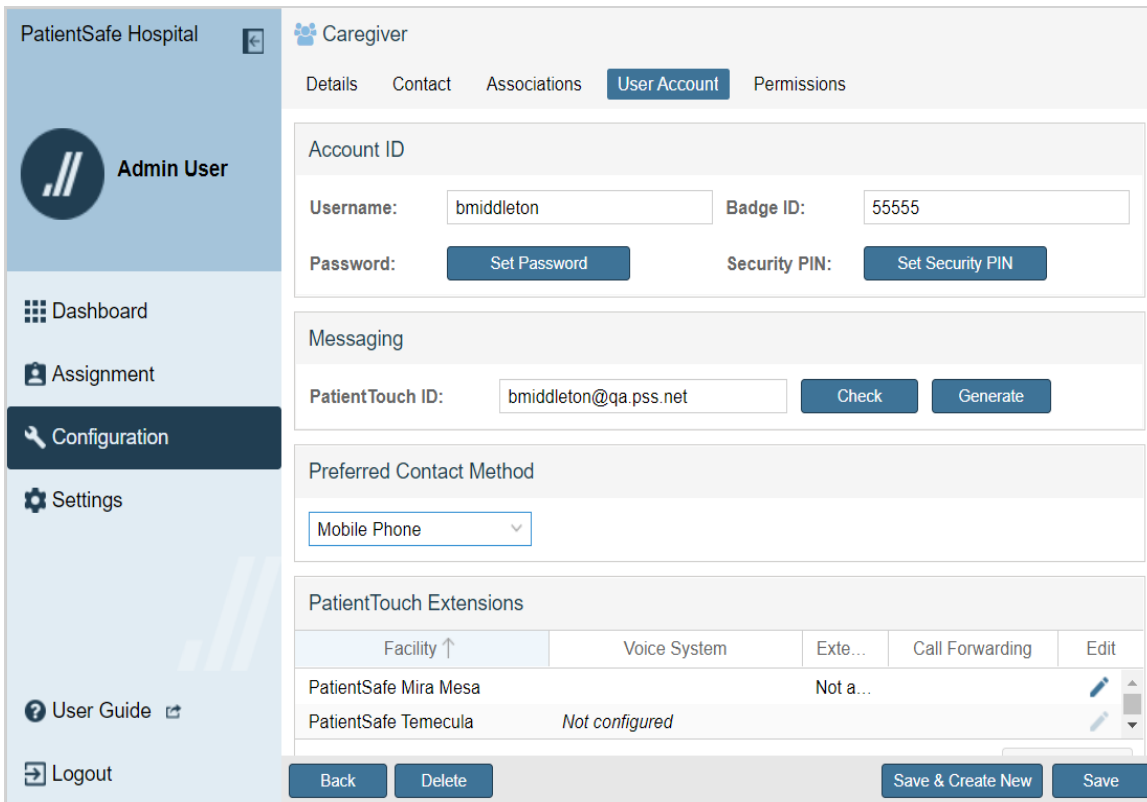
- 1234 or 4321 or 8765 will not be accepted
- No repeated digits
- You will not be able to save your pin if it has been used by another caregiver.

Click **Done** when you are finished.

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.

- 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. The page is divided into several sections:

- Account ID:** Username: Badge ID: Password: Security PIN:
- Messaging:** PatientTouch ID:
- Preferred Contact Method:**
- PatientTouch Extensions:** A table with columns: Facility ↑, Voice System, Ext..., Call Forwarding, Edit.

Facility ↑	Voice System	Ext...	Call Forwarding	Edit
PatientSafe Mira Mesa		Not a...		<input type="button" value="Edit"/>
PatientSafe Temecula	Not configured			<input type="button" value="Edit"/>

At the bottom of the page are buttons: , , , and .

- 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.

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

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

The screenshot shows the 'PatientTouch Extension' configuration window. Red callouts are placed as follows:

- 2**: Points to the 'PatientSafe Mira Mesa' facility name.
- 3**: Points to the 'Call Forwarding' section.
- 4**: Points to the 'Available PatientTouch Extensions' table.
- 5**: Points to the 'Find Next Available' button.
- 6**: Points to the 'Allow Voicemail' checkbox.
- 7**: Points to the 'Forwarding #' radio button.
- 8**: Points to the 'Done' button at the bottom right.

The 'Available PatientTouch Extensions' table contains the following data:

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

The 'Find Next Available' table contains the following data:

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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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	Extens...	Call Forwarding	Edit
PatientSafe Mira Mesa	doc server freeswitch	1015	858-746-3100	<input type="button" value="Edit"/>
PatientSafe Temecula	<i>Not configured</i>			<input type="button" value="Edit"/>

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."

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Details Contact Associations User Account **Permissions**

Facility: PatientSafe Mira Mesa Edit Caregiver Permissions

Note: Permissions are facility-specific in addition to and will not override permissions inherited from Clinical Profiles, if any.

Facility Permissions Search

Permission ↑	Description	Scope	Access	Source(s)
No permissions configured.				

Back Delete Save & Create New Save

2. Click **Edit Caregiver Permissions**.

The screenshot displays the PatientTouch Enterprise Manager interface. On the left is a navigation sidebar with the following items: PatientSafe Hospital, Admin User, Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The main content area is titled 'Caregiver' and includes tabs for Details, Contact, Associations, User Account, and Permissions. Below the tabs, the 'Facility' is set to 'PatientSafe Mira Mesa', and the 'Edit Caregiver Permissions' button is highlighted with a red box. A note states: 'Note: Permissions configured here will be in addition to and will not override permissions inherited from Clinical Profiles, if any.' Below this is a 'Facility Permissions' section with a search field and a table. The table has columns for Permission, Description, Scope, Access, and Source(s). The table is currently empty, displaying 'No permissions configured.' At the bottom of the interface are buttons for Back, Delete, Save & Create New, and Save.

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

PatientSafe Hospital Caregiver
 Details Contact Associations User Account **Permissions**

Edit Permissions: PatientSafe Mira Mesa

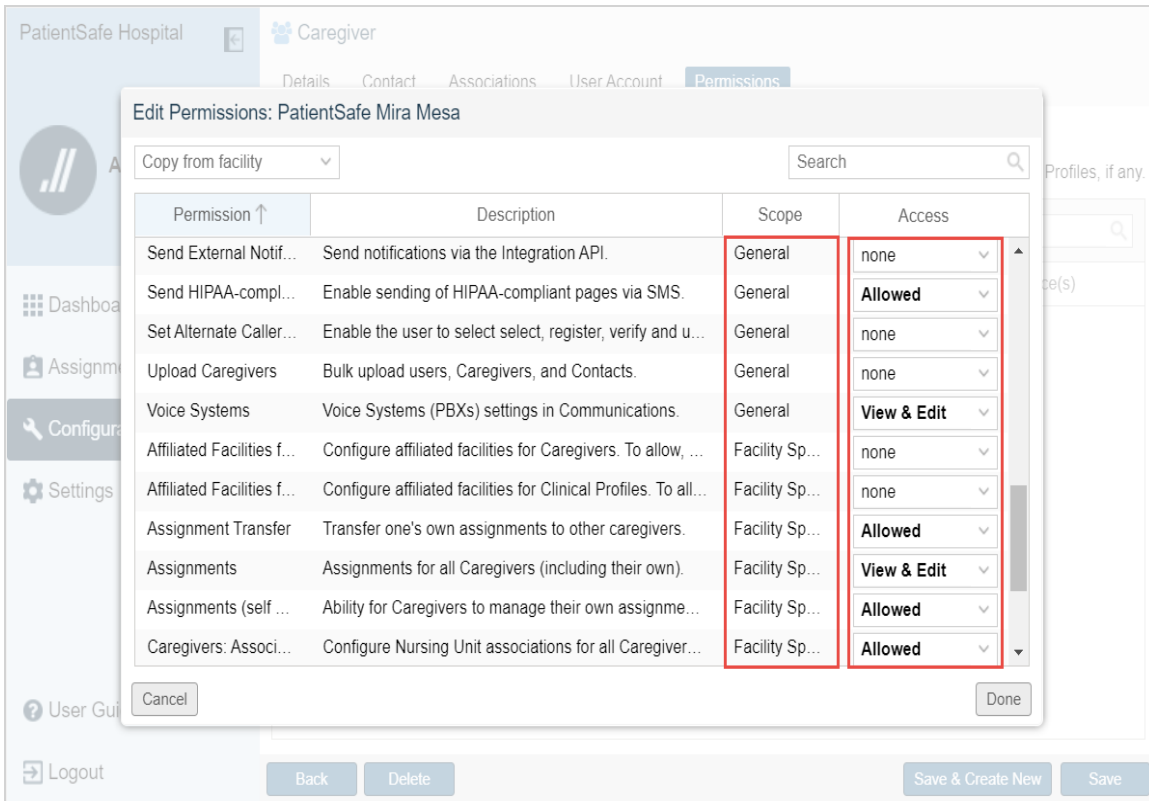
Copy from facility Search

Description	Scope	Access
Access Clinical Ma...	General	none
Access Enterprise ...	General	none
Access Integration ...	General	none
Access Messaging ...	General	none
Access PatientTouch	General	none
Affiliated Facilities (...)	General	none
Caregivers	General	none
Caregivers: Patient...	General	none
Caregivers: User A...	General	none
Clinical Attributes	General	none
Configure On-Call I...	General	none

Cancel Done

Back Delete Save & Create New Save

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.



PatientSafe Hospital Caregiver
 Details Contact Associations User Account **Permissions**

Edit Permissions: PatientSafe Mira Mesa
 Copy from facility Search

Permission ↑	Description	Scope	Access
Send External Notif...	Send notifications via the Integration API.	General	none
Send HIPAA-compl...	Enable sending of HIPAA-compliant pages via SMS.	General	Allowed
Set Alternate Caller...	Enable the user to select select, register, verify and u...	General	none
Upload Caregivers	Bulk upload users, Caregivers, and Contacts.	General	none
Voice Systems	Voice Systems (PBXs) settings in Communications.	General	View & Edit
Affiliated Facilities f...	Configure affiliated facilities for Caregivers. To allow, ...	Facility Sp...	none
Affiliated Facilities f...	Configure affiliated facilities for Clinical Profiles. To all...	Facility Sp...	none
Assignment Transfer	Transfer one's own assignments to other caregivers.	Facility Sp...	Allowed
Assignments	Assignments for all Caregivers (including their own).	Facility Sp...	View & Edit
Assignments (self ...	Ability for Caregivers to manage their own assignme...	Facility Sp...	Allowed
Caregivers: Associ...	Configure Nursing Unit associations for all Caregiver...	Facility Sp...	Allowed


Cancel Done

User Gui Logout Back Delete Save & Create New Save

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.

PatientSafe Hospital  Caregiver: Brenda Middleton

Details Contact Associations User Account Permissions

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Caregiver Information


First Name: Middle Initial:

Last Name: Signature Initials:





Job Title: Credentials:

Department:

Company Name:

Profile Photo


Affiliated Facilities

Facility ↑	Caregiver External ID	Remove
PatientSafe Mira Mesa	none	 
		 

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**.

PatientSafe Hospital  Caregiver: Brenda Middleton

Details Contact Associations User Account Permissions

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Caregiver Information

First Name: Middle Initial:


Last Name: Signature Initials:

Job Title: Credentials:



Department:

Company Name:

Profile Photo



Affiliated Facilities

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

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

The screenshot displays the 'Caregiver: Brenda Middleton' profile page in the PatientTouch Enterprise Manager. The page includes a sidebar with navigation options: Admin User, Dashboard, Assignment, Configuration, Settings, User Guide, and Logout. The main content area shows the caregiver's details, including First Name (Brenda), Last Name (Middleton), Job Title (Registered Nurse), Middle Initial, Signature Initials, Credentials (RN), and Department. A 'Confirm' dialog box is overlaid on the profile, with the text: 'You have unsaved changes. Are you sure you want to save and inactivate the caregiver: Brenda Middleton? will be removed.' The dialog box has 'No' and 'Yes' buttons. Below the profile, there is a table for 'Affiliated Facilities' with columns for Facility, Caregiver External ID, and Remove. The table contains one entry for 'PatientSafe Mira Mesa' with an external ID of 'none'. At the bottom of the page, there are buttons for 'Back', 'Delete', 'Inactivate', 'Save & Create New', and 'Save'.

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

PatientSafe Hospital

Caregiver: *Brenda Middleton (Inactive)*

Details Contact Associations User Account Permissions

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Caregiver Information

First Name: Brenda Middle Initial:


Last Name: Middleton Signature Initials:

Job Title: Registered Nurse Credentials: RN


Department:

Company Name:

Profile Photo

 Choose Photo... Remove Photo

Affiliated Facilities

Facility ↑	Caregiver External ID	Remove
PatientSafe Mira Mesa	none	

Edit

Back Delete Activate **Inactivated on: Nov 26, 2019 09:51** Save & Create New Save

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

PatientSafe Hospital Caregivers Facility: All

Admin User

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

Show Options

- Show inactivated Caregivers
- Show User Accounts only
- Show system users

Title	Username	Badge ID	PatientTouch ID	Edit	Delete
ter...	<i>bmiddleton</i>	5555	<i>bmiddleton@qa.pss...</i>		


Page 1 of 1 1 - 1 of 1

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

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 'Caregivers' and includes a 'Facility' dropdown menu set to 'All' and a search box containing 'brenda'. Below the search is a 'Show Options' dropdown. A table lists caregiver information with columns: Last Name (sorted ascending), First Name, Job Title, Username, Badge ID, PatientTouch ID, Edit, and Delete. One entry is visible: Middleton, Brenda, Register..., bmiddleton, 5555, bmiddleton@qa.pss.... At the bottom of the main area, there is a pagination control showing 'Page 1 of 1' and a 'Create New' button.


Last Name ↑	First Name	Job Title	Username	Badge ID	PatientTouch ID	Edit	Delete
Middleton	Brenda	Register...	bmiddleton	5555	bmiddleton@qa.pss....		

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

PatientSafe Hospital  Caregiver: *Brenda Middleton (Inactive)*

Details Contact Associations User Account Permissions

Admin User

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Caregiver Information


First Name: Middle Initial:

Last Name: Signature Initials:

Job Title: Credentials:

Department:




Company Name:

Profile Photo 

Additional IDs

ID Type	Identifier	Facility	Remove
No additional ids set.			

Affiliated Facilities

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

Inactivated on: Nov 26, 2019 09:51

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

PatientSafe Hospital

Caregiver: *Brenda Middleton (Inactive)*

Details Contact Associations User Account Permissions

Admin User

Dashboard

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Logout

First Name: Brenda Middle Initial:

Last Name: Middleton Signature Initials:

Job Title: Registered Nurse Credentials: RN

Department:

Confirm

Are you sure you want to activate caregiver: Brenda Middleton?

No Yes

Affiliated Facilities

Facility ↑	Caregiver External ID	Remove
PatientSafe Mira Mesa	none	

Back Delete Activate Inactivated on: Nov 26, 2019 09:51 Save & Create New Save

9. The profile is now active again.

PatientSafe Hospital
Caregiver: Brenda Middleton

Details
Contact
Associations
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Caregiver Information

First Name:	<input type="text" value="Brenda"/>	Middle Initial:	<input type="text"/>
Last Name:	<input type="text" value="Middleton"/>	Signature Initials:	<input type="text"/>
Job Title:	<input type="text" value="Registered Nurse"/>	Credentials:	<input type="text" value="RN"/>
		Department:	<input type="text"/>
		Company Name:	<input type="text"/>

Profile Photo

Choose Photo...
Remove Photo

Additional IDs

ID Type	Identifier	Facility	Remove
No additional ids set.			

Add
Edit

Affiliated Facilities


Facility ↑	Caregiver External ID	Remove
PatientSafe Mira Mesa	none	

Edit



































Back
Delete
Inactivate
Save & Create New
Save






Editing Caregiver

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


PatientSafe Hospital  Caregivers Facility: All

Show Options ▾


Last Name ↑	First Name	Job Title	Username	Badge ID	PatientTouch ID	Edit	Delete
Madden	Margie	Registe...	mmadden	1234567	mmadden@qa.pss...		
Malana	Alana	RN	am01	am01	am01@qa.pss.net		
malone	kevin		kevinm	kevinm	kevinm@qa.pss.net		
Malone	Mack	House ...	shouse	45456	shouse@qa.pss.net		
Mana	Shana	RN	shma	shama	shma@qa.pss.net		
Mangeri	Cassie	RN, Ca...	cman	cman	cman@qa.pss.net		
mela	flafel	RN	fla01	fla01	fla01@qa.pss.net		
Middleton	Brenda	Registe...	bmiddleton	5555	bmiddleton@qa.pss...		
Miller	James	Hospitalist	jmiller	jmiller	jmiller@qa.pss.net		
Mo	Tania	Team N...	tmo	tmo	tmo@qa.pss.net		
Molana	Fiona	RN	fm01	fm01	fm01@qa.pss.net		
Molani	Olga		olgam	olgam	olgam@qa.pss.net		
mom	zora	RN	zmm01	zmm01	zmm01@qa.pss.net		
Mulcahy	John Fr...	Chaplain	jmulcahy	jmulcahy	jmulcahy@qa.pss.net		
Noble	Roxy	RN	rn	rn	rn@qa.pss.net		
Nunby	Cheryl	Charge ...	cnurse	2255	cnurse@qa.pss.net		
Nurse	Jackie	MD	nurse1				





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

PatientSafe Hospital  Caregiver: Brenda Middleton

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Caregiver Information


First Name: Middle Initial:

Last Name: Signature Initials:

Job Title: Credentials:

Department:


Company Name:

Profile Photo 

Additional IDs

ID Type	Identifier	Facility	Remove
No additional ids set.			

Affiliated Facilities


Facility ↑	Caregiver External ID	Remove
PatientSafe Mira Mesa	none	

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.


PatientSafe Hospital  Caregivers Facility: All

Show Options ▾


Last Name ↑	First Name	Job Title	Username	Badge ID	PatientTouch ID	Edit	Delete
Madden	Margie	Registe...	mmadden	1234567	mmadden@qa.pss...		
Malana	Alana	RN	am01	am01	am01@qa.pss.net		
malone	kevin		kevinm	kevinm	kevinm@qa.pss.net		
Malone	Mack	House ...	shouse	45456	shouse@qa.pss.net		
Mana	Shana	RN	shma	shama	shma@qa.pss.net		
Mangeri	Cassie	RN, Ca...	cman	cman	cman@qa.pss.net		
mela	flafel	RN	fla01	fla01	fla01@qa.pss.net		
Middleton	Brenda	Registe...	bmiddleton	5555	bmiddleton@qa.pss...		
Miller	James	Hospitalist	jmiller	jmiller	jmiller@qa.pss.net		
Mo	Tania	Team N...	tmo	tmo	tmo@qa.pss.net		
Molana	Fiona	RN	fm01	fm01	fm01@qa.pss.net		
Molani	Olga		olgam	olgam	olgam@qa.pss.net		
mom	zora	RN	zmm01	zmm01	zmm01@qa.pss.net		
Mulcahy	John Fr...	Chaplain	jmulcahy	jmulcahy	jmulcahy@qa.pss.net		
Noble	Roxy	RN	rn	rn	rn@qa.pss.net		
Nunby	Cheryl	Charge ...	cnurse	2255	cnurse@qa.pss.net		
Nurse	Jackie	MD	nurse1				





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

PatientSafe Hospital  Caregiver: Brenda Middleton

Details Contact Associations User Account Permissions

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Caregiver Information


First Name: Middle Initial:

Last Name: Signature Initials:

Job Title: Credentials:

Department:




Company Name:

Profile Photo 

Additional IDs

ID Type	Identifier	Facility	Remove
No additional ids set.			

Affiliated Facilities

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

Searching for Existing Caregivers

Search Caregivers using any of the following methods.

1. Search within a specific facility.

PatientSafe Hospital
Caregivers
Facility: All
Search

Show Options

Last Name ↑	First Name	Job Title	Username	Badge ID	Edit	Delete
Madden	Margie	Registe...	mmadden			
Malana	Alana	RN	am01			
malone	kevin		kevinm			
Malone	Mack	House ...	shouse			
Mana	Shana	RN	shma			
Mangeri	Cassie	RN, Ca...	cman			
mela	flafel	RN	fla01	fla01	fla01@qa.pss.net	
Middleton	Brenda	Registe...	bmiddleton	5555	bmiddleton@qa.pss...	
Miller	James	Hospitalist	jmiller	jmiller	jmiller@qa.pss.net	
Mo	Tania	Team N...	tmo	tmo	tmo@qa.pss.net	
Molana	Fiona	RN	fm01	fm01	fm01@qa.pss.net	
Molani	Olga		olgam	olgam	olgam@qa.pss.net	
mom	zora	RN	zmm01	zmm01	zmm01@qa.pss.net	
Mulcahy	John Fr...	Chaplain	jmulcahy	jmulcahy	jmulcahy@qa.pss.net	
Noble	Roxy	RN	rn	rn	rn@qa.pss.net	
Nunby	Cheryl	Charge ...	cnurse	2255	cnurse@qa.pss.net	
Nurse	Jackie	MD	nurse1			

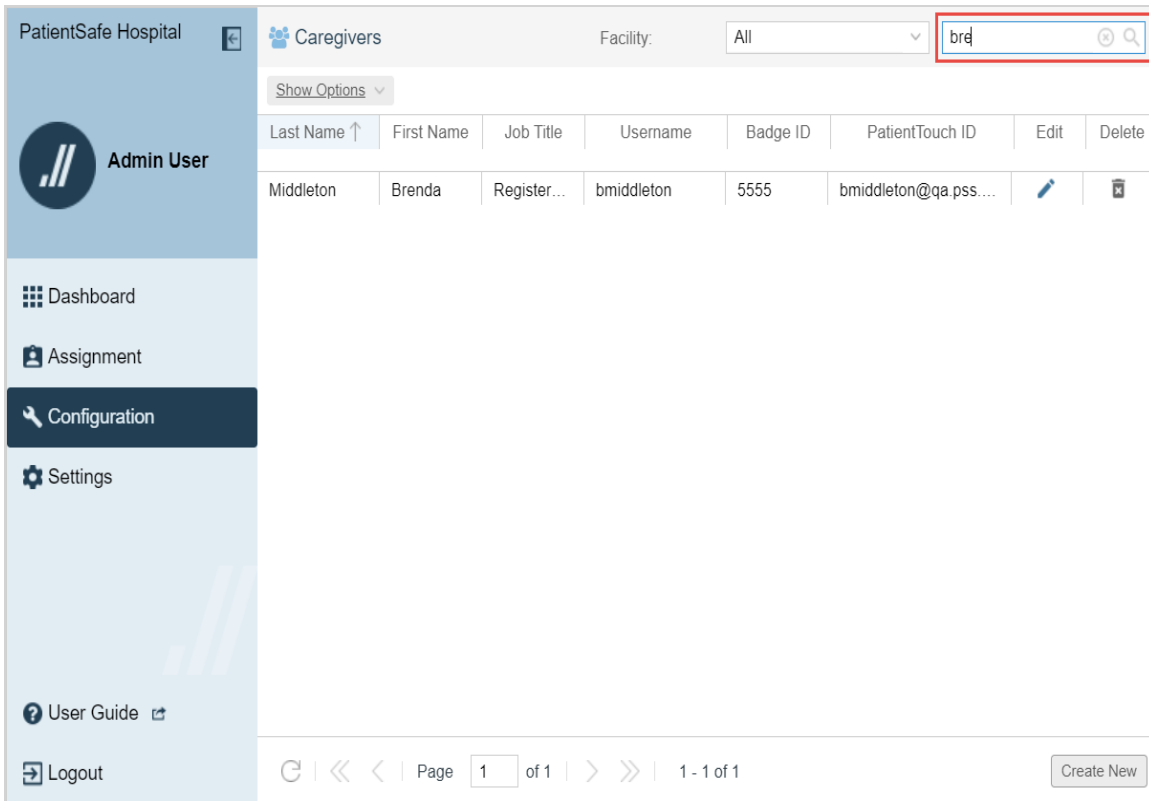
Admin User

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- Assignment
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Create New

- 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.



The screenshot displays the PatientTouch Enterprise Manager interface. On the left is a navigation sidebar with the following items: PatientSafe Hospital, Admin User (with profile icon), Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The main content area is titled 'Caregivers' and includes a 'Facility:' dropdown menu set to 'All'. A search bar is highlighted with a red box and contains the text 'bre'. Below the search bar is a 'Show Options' dropdown menu. A table lists the search results:

Last Name ↑	First Name	Job Title	Username	Badge ID	PatientTouch ID	Edit	Delete
Middleton	Brenda	Register...	bmiddleton	5555	bmiddleton@qa.pss...		

At the bottom of the page, there is a pagination control showing 'Page 1 of 1' and a 'Create New' button.

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

PatientSafe Hospital
Caregivers
Facility: All
Search

Show Options

- Show inactivated Caregivers
- Show User Accounts only
- Show system users

			Title	Username	Badge ID	PatientTouch ID	Edit	Delete
				zohreh"	zohreh"			
Aardema	Peter	Floating...	paardema	1127	paardema@qa.pss...			
Aardvarck	Sherry	Case M...	saardvarck	1125	saardvarck@qa.ps...			
Aaron	Sally	ED Nurse	saaron	1126	saaron@qa.pss.net			
Ababa	Darlene	Pediatr...	dababa	1129	dababa@qa.pss.net			
Abaca	Rodney	Neurolo...	rabaca	1130	rabaca@qa.pss.net			
Abba	Mary	Registe...	mabba	1128	mabba@qa.pss.net			
Abbey	Daniel	Anesthe...	dabbey	1131	dabbey@qa.pss.net			
Abel	David	Transpo...	dabel	1124	dabel@qa.pss.net			
Abercrombie	Rodriquez	Anesthe...	rabercrombie	1133	rabercrombie@qa.p...			
Aberdeen	Shelly	Certifie...	saberdeen	1114	saberdeen@qa.pss...			
Abernathy	Linda	Registe...	labernathy	1113	labernathy@qa.pss...			
Abindale	Mike	Cardiol...	mabindale	1115	mabindale@qa.pss...			
Abirnith	Keith	Anesthe...	kabirnith	1110	kabirnith@qa.pss.net			
Able	Paul	Surgeon	pable	1123	pable@qa.pss.net			
Abney	Steve	Surgeon	sabney	1132	sabney@qa.pss.net			
Abundy	Malcolm	Phlebot...	mabundy	1116	mabundy@qa.pss.net			

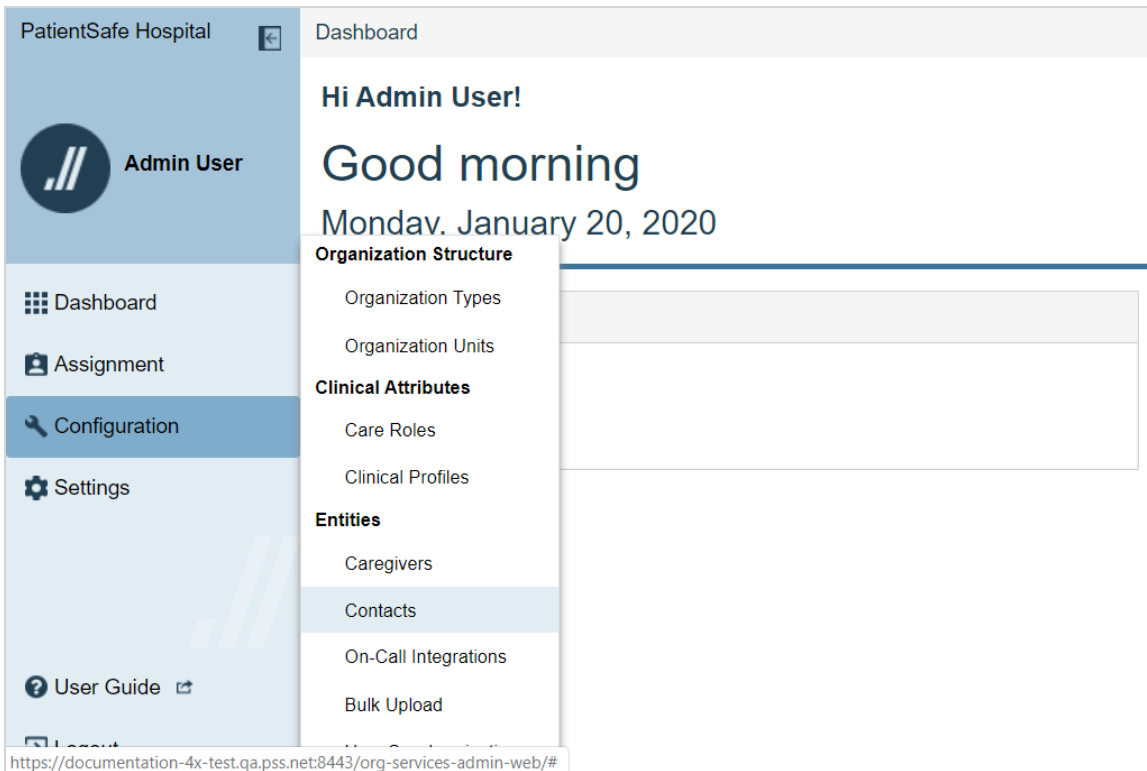
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Create New

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.

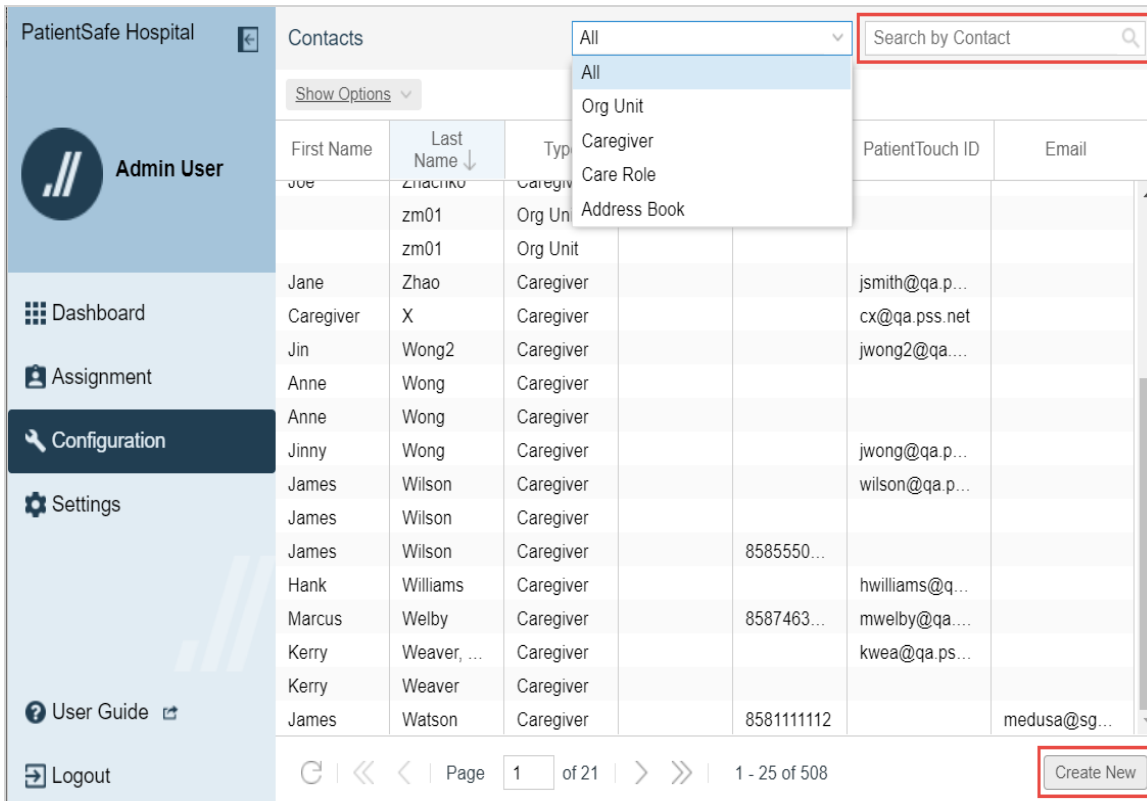
View Existing Contacts

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**.



PatientSafe Hospital Admin User

Contacts All Search by Contact

Show Options

First Name	Last Name ↓	Type	PatientTouch ID	Email
Joe	Zhao	Caregiver		
	zm01	Org Un		
	zm01	Org Unit		
Jane	Zhao	Caregiver		jsmith@qa.p...
	X	Caregiver		cx@qa.pss.net
Jin	Wong2	Caregiver		jwong2@qa...
Anne	Wong	Caregiver		
Anne	Wong	Caregiver		
Jinny	Wong	Caregiver		jwong@qa.p...
James	Wilson	Caregiver		wilson@qa.p...
James	Wilson	Caregiver		
James	Wilson	Caregiver	8585550...	
Hank	Williams	Caregiver		hwilliams@q...
Marcus	Welby	Caregiver	8587463...	mwelby@qa...
Kerry	Weaver, ...	Caregiver		kwea@qa.ps...
Kerry	Weaver	Caregiver		
James	Watson	Caregiver	858111112	medusa@sg...

Page 1 of 21 | 1 - 25 of 508 Create New

5. Enter contact information including:

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

6. Click **Edit** under **Restricted Facilities** to add this contact to a specific facility.

Note If a contact entry doesn't have affiliation to any facilities, it will show up in all Browse nodes.

PatientSafe Hospital

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Contact

Contact Information

First Name: Middle Initial:

Last Name: Signature Initials:

Job Title: Credentials:

Company Name:

Department:

Restricted Facilities

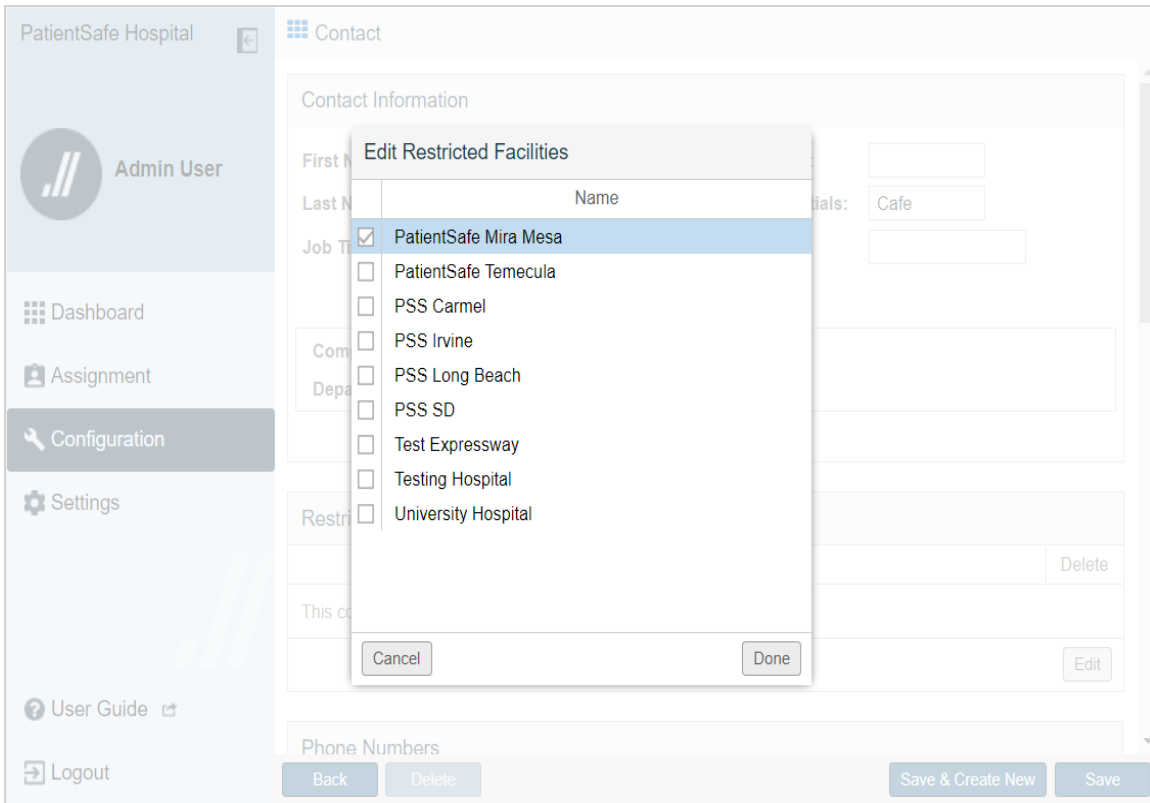
Facility	Delete
This contact is not restricted to any facilities.	

Edit

Phone Numbers

Back Delete Save & Create New Save

7. Select the facility and click **Done**.
8. When users search for the contact (cafeteria) under "Browse," on the handheld for example, this cafeteria will only display for the Mira Mesa facility.



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

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Contact
✕

Phone Numbers

Type	Number	Facility	Hidden	Delete
Mobile Phone	8585551214			✕

Email Addresses

Type	Address	Delete
Work Email	cafemiramesa@hospital.net	✕

Postal Addresses

Type	Address	City	State	ZIP	Delete
	Add...				✕

10. 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.

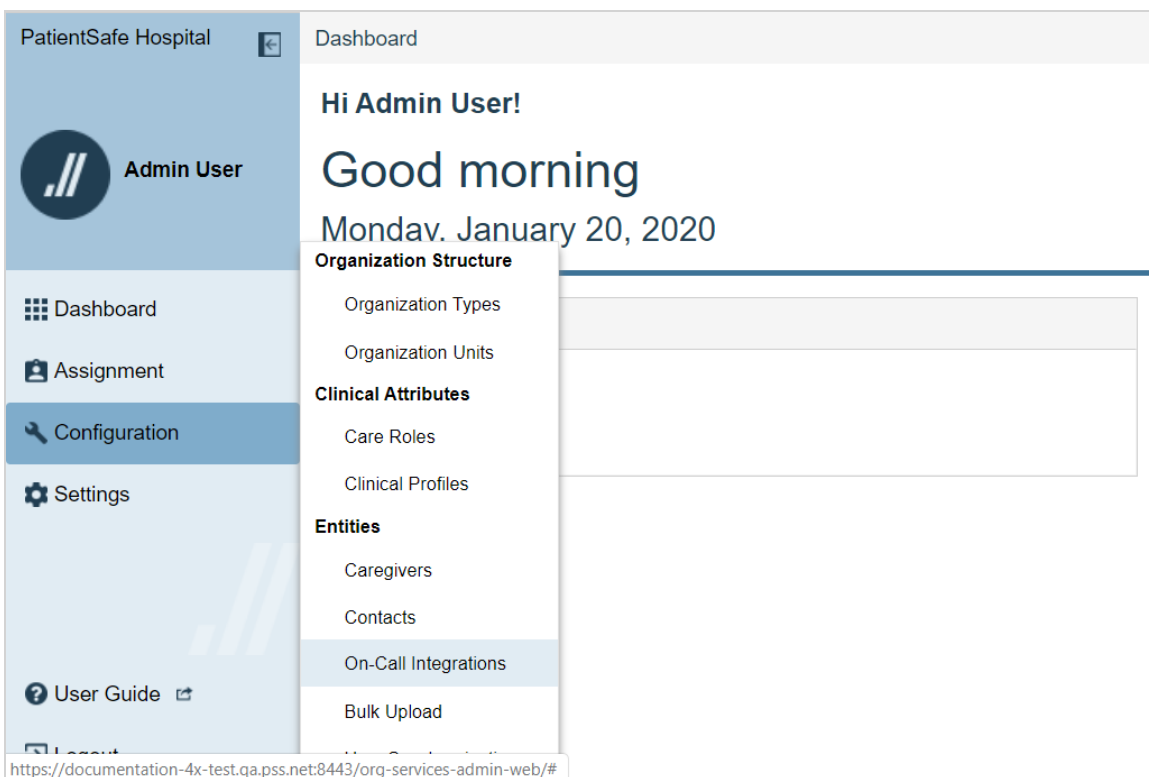
Once the master schedule is created, hospitals are given an AMiON account, which they can use to configure schedules in Enterprise Manager.

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

Configure On Call Schedules

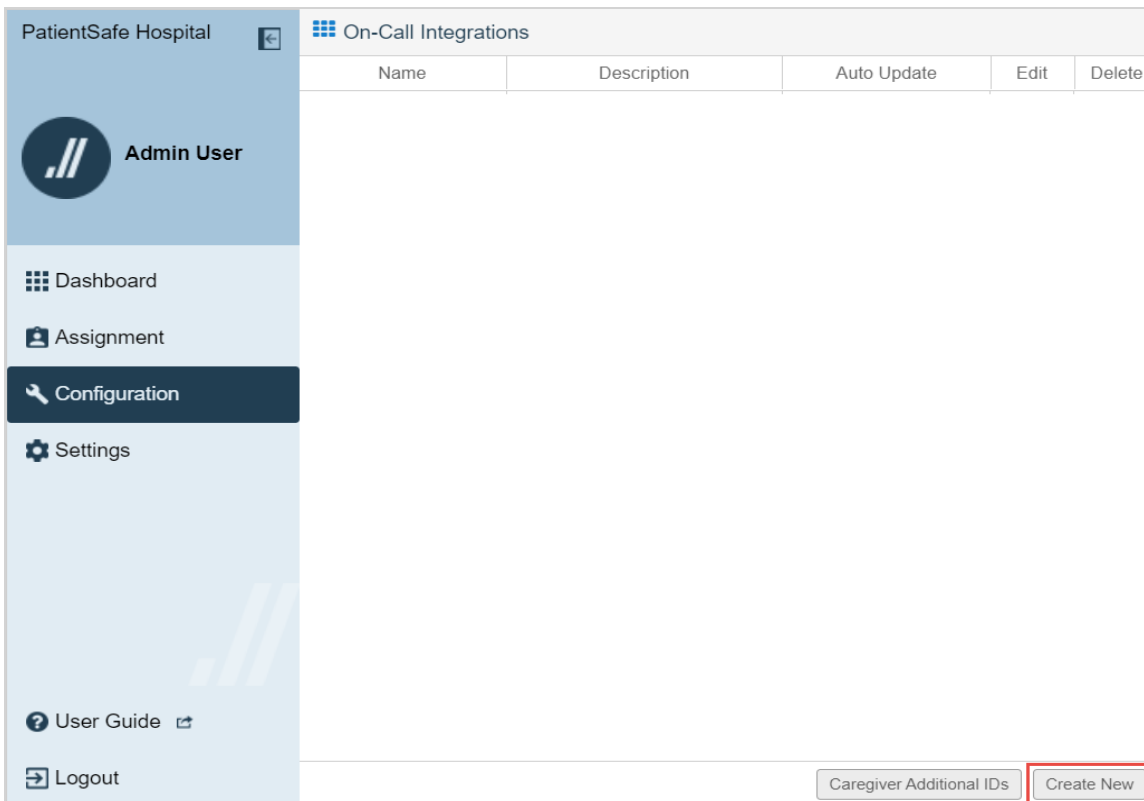
To configure on call schedules, follow the instructions below.

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



The screenshot shows the PatientSafe Hospital Admin User interface. The left sidebar contains the following menu items: Dashboard, Assignment, Configuration (highlighted), Settings, User Guide, and Logout. The main content area displays a greeting: "Hi Admin User! Good morning Monday, January 20, 2020". Below the greeting, there is a dropdown menu for "On-Call Integrations" with the following options: Organization Structure (sub-menu: Organization Types, Organization Units), Clinical Attributes (sub-menu: Care Roles, Clinical Profiles), Entities (sub-menu: Caregivers, Contacts, On-Call Integrations (highlighted), Bulk Upload). The URL at the bottom of the browser window is <https://documentation-4x-test.qa.pss.net:8443/org-services-admin-web/#>.

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.
- Type:** Select the type from the drop down menu: AMiON, QGenda, or Integration API.
- 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.
- Update Every (Minutes):** Enter the number of minutes you want the system to be automatically updated.

4. Click **Save**.

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On-Call Integration: Cardiology On-Call

Details Schedules

Basic Information

Name: Cardiology On-Call

Description:

Type: AMiON

AMiON Account Login: pss

Default Facility: PatientSafe Mira Mesa

Timezone: America/Los_Angeles (GMT-8)

Auto Update:

Update Every (Minutes): 60

Back Save

5. Click **Configure here...** or click the **Schedules** tab.

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On-Call Integration: Cardiology On-Call

Details **Schedules**

Basic Information

Name: Cardiology On-Call

Description:

Type: AMiON

AMiON Account Login: pss

Default Facility: PatientSafe Mira Mesa

Timezone: America/Los_Angeles (GMT-8)

Auto Update:

Update Every (Minutes): 60

Status

Last Updated: Never

No schedules configured. **Configure here...**

Back Update Assignments Save

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


6. Click the **Active** check box under **Schedules** to activate each schedule for the facility.
7. Click a schedule to view associated shifts, which display beneath, under **Services**.

The screenshot shows the 'On-Call Integration: Cardiology On-Call' configuration page. The left sidebar contains navigation options: Dashboard, Assignment, Configuration, Settings, User Guide, and Logout. The main content area has two tabs: 'Details' and 'Schedules'. The 'Schedules' tab is active, displaying a table with columns: External Schedule, Display Name ↑, Last Updated, and Active. The 'Cardiology On Call' row is highlighted in blue and has its 'Active' checkbox checked. Below this is the 'Services - Cardiology On Call' section, which contains a table with columns: External Service, Display Name, Last Updated, and Active. The 'Cardiology AM' row is highlighted in red. At the bottom of the main content area, there are buttons for 'Back', 'Update Assignments', and 'Save'.

External Schedule	Display Name ↑	Last Updated	Active
Cardiology	Cardiology		<input type="checkbox"/>
Cardiology On Call	Cardiology On Call		<input checked="" type="checkbox"/>
Hematology	Hematology		<input checked="" type="checkbox"/>
Infectious Disease	Infectious Disease		<input checked="" type="checkbox"/>
Orthopedic Surgery	Orthopedic Surgery		<input type="checkbox"/>
Pediatric	Pediatric		<input type="checkbox"/>
Radiology	Radiology		<input type="checkbox"/>
Urology	Urology		<input checked="" type="checkbox"/>

External Service	Display Name	Last Updated	Active
Cardiology AM	Cardiology AM		<input type="checkbox"/>
Cardiology PM	Cardiology PM		<input type="checkbox"/>
Cardiology Tech	Cardiology Tech		<input type="checkbox"/>
Cardiology Supervisor	Cardiology Supervisor		<input type="checkbox"/>

8. Click **Active** on each associated shift, under **Services**, to activate the shift.
9. Select a shift and click **Edit** or double-click the shift.

PatientSafe Hospital 


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On-Call Integration: Cardiology On-Call

Details **Schedules**


Schedules




External Schedule	Display Name ↑	Last Updated	Active
Cardiology	Cardiology		<input type="checkbox"/>
Cardiology On Call	Cardiology On Call		<input checked="" type="checkbox"/>
Hematology	Hematology		<input checked="" type="checkbox"/>
Infectious Disease	Infectious Disease		<input checked="" type="checkbox"/>
Orthopedic Surgery	Orthopedic Surgery		<input type="checkbox"/>
Pediatric	Pediatric		<input type="checkbox"/>
Radiology	Radiology		<input type="checkbox"/>
Urology	Urology		<input checked="" type="checkbox"/>

 Edit

Services - Cardiology On Call

External Service	Display Name	Last Updated	Active
Cardiology AM	Cardiology AM		<input checked="" type="checkbox"/>
Cardiology PM	Cardiology PM		<input checked="" type="checkbox"/>
Cardiology Tech	Cardiology Tech		<input checked="" type="checkbox"/>
Cardiology Supervisor	Cardiology Supervisor		<input type="checkbox"/>
Cardiopulmonary Mana...	Cardiopulmonary Mana...		<input type="checkbox"/>

 Edit

 Back  Update Assignments  Save

10. 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.

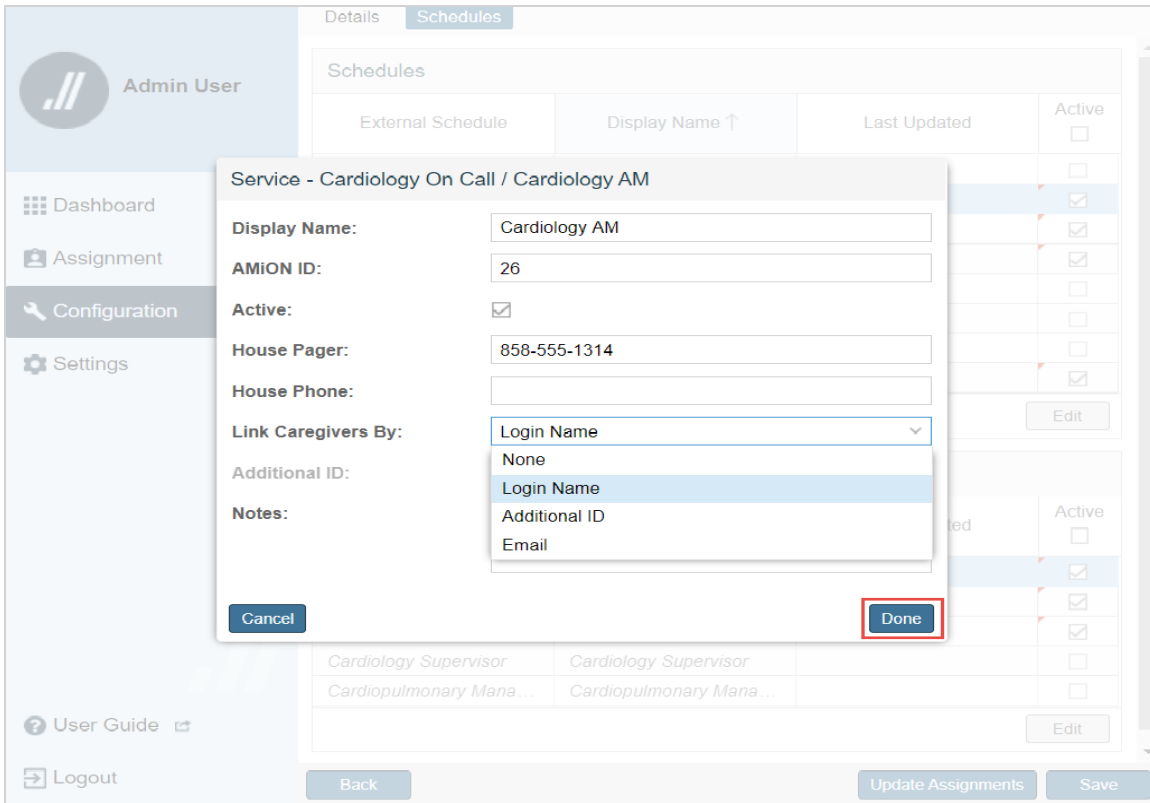
House Pager: Enter the house page number for the shift.

House Phone: Enter the house phone number for the shift.

Link Caregivers By: Click the drop down menu and select: Login Name, Additional ID, or Email. 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.

11. Click **Done**.



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

PatientSafe Hospital

Admin User

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On-Call Integration: Cardiology On-Call

Details **Schedules**

Schedules

External Schedule	Display Name ↑	Last Updated	Active
Cardiology	Cardiology		<input type="checkbox"/>
Cardiology On Call	Cardiology On Call		<input checked="" type="checkbox"/>
Hematology	Hematology		<input checked="" type="checkbox"/>
Infectious Disease	Infectious Disease		<input checked="" type="checkbox"/>
Orthopedic Surgery	Orthopedic Surgery		<input type="checkbox"/>
Pediatric	Pediatric		<input type="checkbox"/>
Radiology	Radiology		<input type="checkbox"/>
Urology	Urology		<input checked="" type="checkbox"/>

Edit

Services - Cardiology On Call

External Service	Display Name	Last Updated	Active
Cardiology AM	Cardiology AM		<input checked="" type="checkbox"/>
Cardiology PM	Cardiology PM		<input checked="" type="checkbox"/>
Cardiology Tech	Cardiology Tech		<input checked="" type="checkbox"/>
Cardiology Supervisor	Cardiology Supervisor		<input type="checkbox"/>
Cardiopulmonary Mana...	Cardiopulmonary Mana...		<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**.

PatientSafe Hospital

Admin User

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On-Call Integrations


Name	Description	Auto Update	Edit	Delete
Cardiology On Call		Yes		



Caregiver Additional IDs

Create New


2. Click **Create New**.

PatientSafe Hospital 

 Caregiver Additional ID Types

Name ↑	Code	Description	Edit	Delete
Nurse 1	ABC123			

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.

PatientSafe Hospital

Caregiver Additional ID Type - Primary Nurse_999

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Basic Information

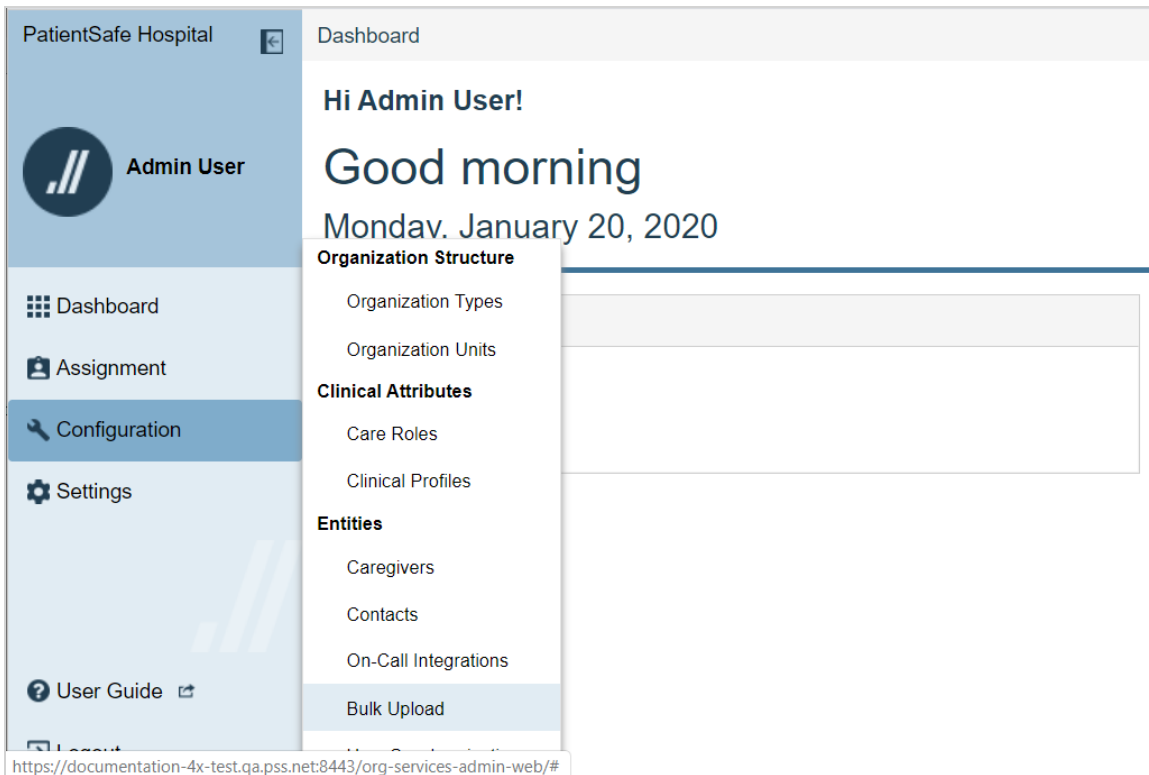
Name:

Description:

Code:

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:

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

Bulk Upload Results

Row#	Sta...	Error Message	Line
No entries			

User Synchronization

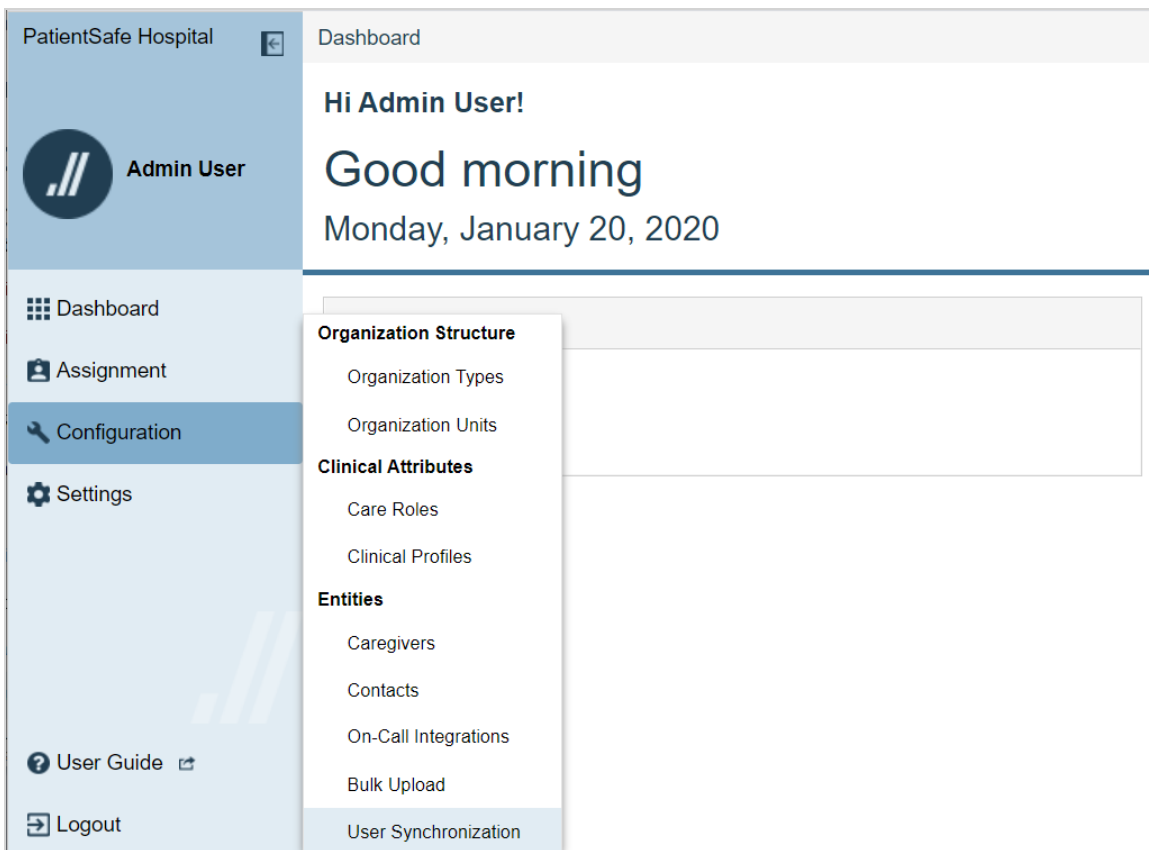
User Synchronization is used to import and map LDAP/AD users into the PatientTouch application. Hospitals need to work with the PatientSafe Solutions Tech Ops team to define the search filters prior to synchronizing them with Enterprise Manager. Once the search filters have been created, users can configure 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**.



The screenshot shows the PatientSafe Hospital dashboard interface. The top navigation bar includes "PatientSafe Hospital" and "Dashboard". The main content area displays a greeting: "Hi Admin User! Good morning Monday, January 20, 2020". A left-hand navigation menu is visible, with "Configuration" selected. A dropdown menu is open from "Configuration", listing various options: "Organization Structure" (with sub-items "Organization Types" and "Organization Units"), "Clinical Attributes" (with sub-items "Care Roles" and "Clinical Profiles"), "Entities" (with sub-items "Caregivers", "Contacts", "On-Call Integrations", and "Bulk Upload"), and "User Synchronization" (which is highlighted).

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**.

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Synchronize Users

Available External Directory Synchronization Providers

<input type="checkbox"/>	Provider Name	P... C..	Remote Address	Scheduled	Initial Delay (min)	Interval (min)
<input checked="" type="checkbox"/>	Synchronizer...	a...	ldaps://TEST-DC-01.test.com:636	True	3	180

User Synchronization Preview Results

Status: Preview completed (total: 1, create: 0, update: 1, delete: 0)

Completed	Provider	Login Name	Operation	Status	Message
11/26/2019 15:50:10	adDocumentationSync	jcartwright	Synchronize	Success	
11/26/2019 15:50:10	adDocumentationSync	msmart	Synchronize	Success	
11/26/2019 15:50:10	adDocumentationSync	ncena	Synchronize	Success	

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.

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Caregiver: Judy Cartwright

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

Caregiver Information

First Name: <input type="text" value="Judy"/>	Middle Initial: <input type="text"/>
Last Name: <input type="text" value="Cartwright"/>	Signature Initials: <input type="text"/>
Job Title: <input type="text"/>	Credentials: <input type="text"/>
	Department: <input type="text"/>
	Company Name: <input type="text"/>

Profile Photo

No profile photo selected.

Additional IDs

ID Type	Identifier	Facility	Remove
No additional ids set.			

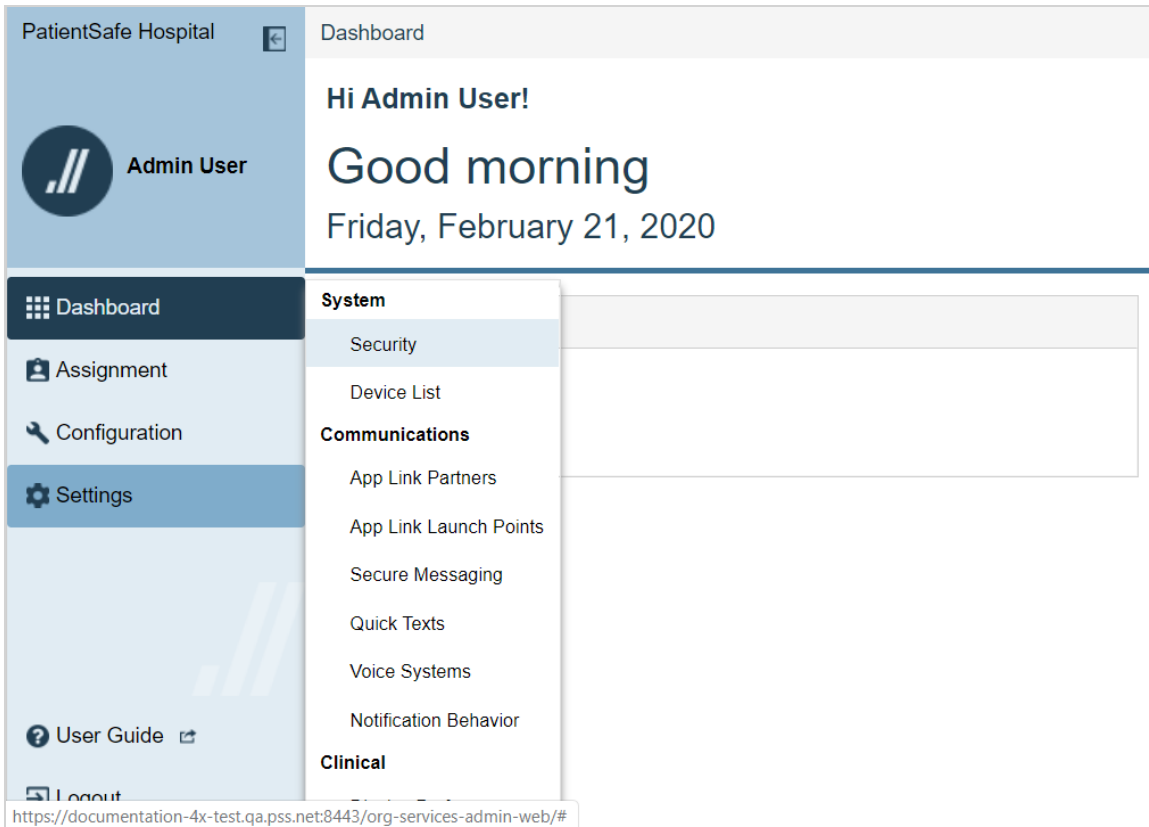
Affiliated Facilities

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

System Settings

Security

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



2. Enter the System Display Name, which is the name that displays in the top left hand corner of the Enterprise Manager screen.



Advanced Settings

3. Click **Advanced Settings**.

4. Use the descriptions in the table below to complete the fields in 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.

Advanced Settings

Name ↑	Value
Cellular Calling Enabled	true
Cellular Calling Extension Length	5
Cellular Calling Prefix	(858) 746-3398
Cellular Calling Prefix Extensions	111 20 22 9
Client Crash Logging (Crashlytics)	true
Enable external authentication.	false
Disable Optimized Ping	false
APNS (iOS) & FCM (Android) Push Notifications	true

Default Preferred Contact Method

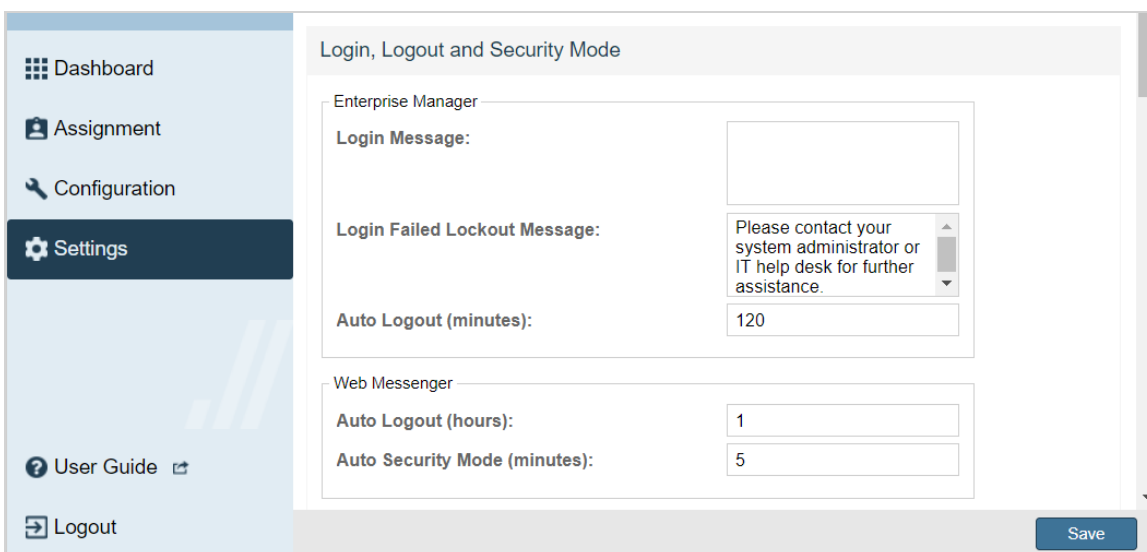
Mobile Phone ▼

Cancel

Login, Logout, and Security Mode

5. Use the descriptions in the table below to complete the fields for this section.

Login Message:	For the Enterprise Manager: Enter the message you want users to see upon logging in.
Login Failed	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."
Lockout Message:	
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.



The screenshot shows the 'Login, Logout and Security Mode' configuration page. On the left is a navigation menu with options: Dashboard, Assignment, Configuration, Settings (highlighted), User Guide, and Logout. The main content area is titled 'Login, Logout and Security Mode' and is divided into two sections: 'Enterprise Manager' and 'Web Messenger'.

Enterprise Manager section:

- Login Message:** A text input field.
- Login Failed Lockout Message:** A text area containing the text: "Please contact your system administrator or IT help desk for further assistance."
- Auto Logout (minutes):** A text input field containing the value "120".

Web Messenger section:

- Auto Logout (hours):** A text input field containing the value "1".
- Auto Security Mode (minutes):** A text input field containing the value "5".

A 'Save' button is located at the bottom right of the configuration area.

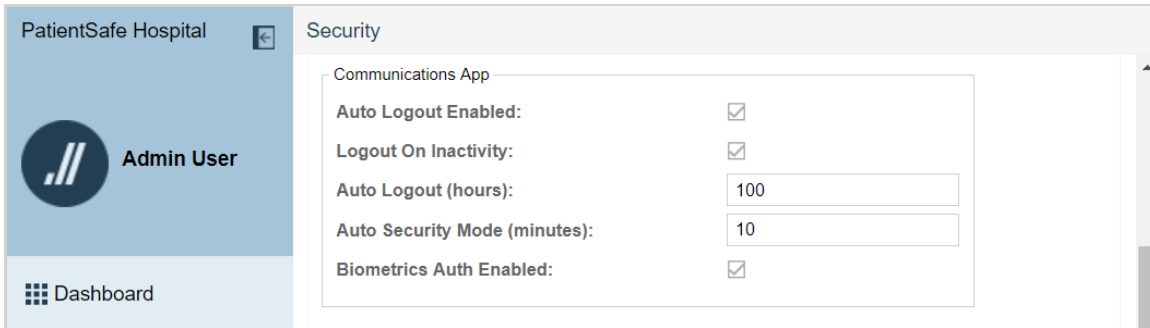
6. Use the descriptions in the table below to complete the fields for the next section.

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 pass-

word or PIN to log in again.

Biometrics Auth Enabled:

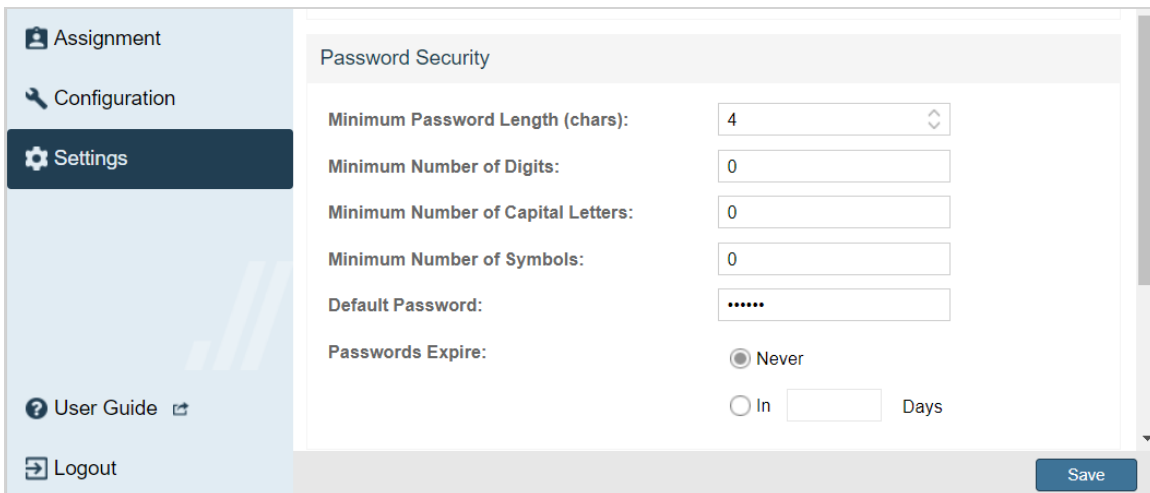
For users of PatientTouch Communications: When selected, this feature enables Touch ID, Face ID, and Fingerprint Sign In. Refer to the next topic titled Configuring Biometric Authentication.



Password Security

7. Use the descriptions in the table below to complete the fields for this section.

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.



PIN Security

8. Use the descriptions in the table below to complete the fields for this section.

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.

Device Security

9. Use the descriptions in the table below to complete the fields for this section.

Clinical App: Require Device Auth:	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.
Communications App: Require Device Auth:	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.

10. 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](#)

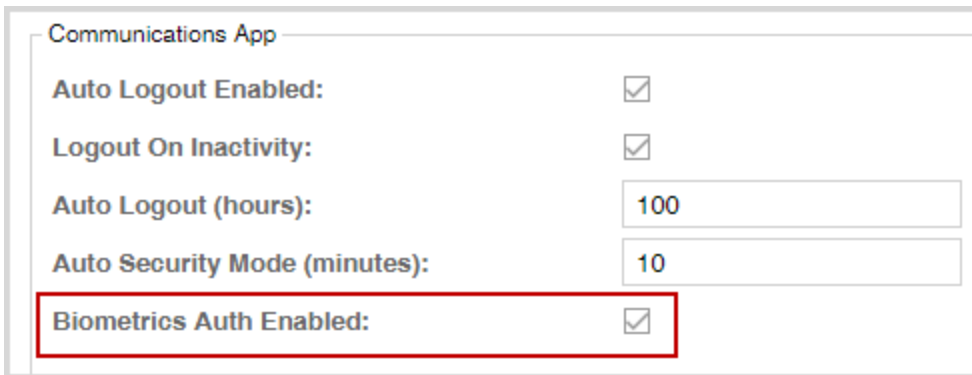
Feature Overview

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.

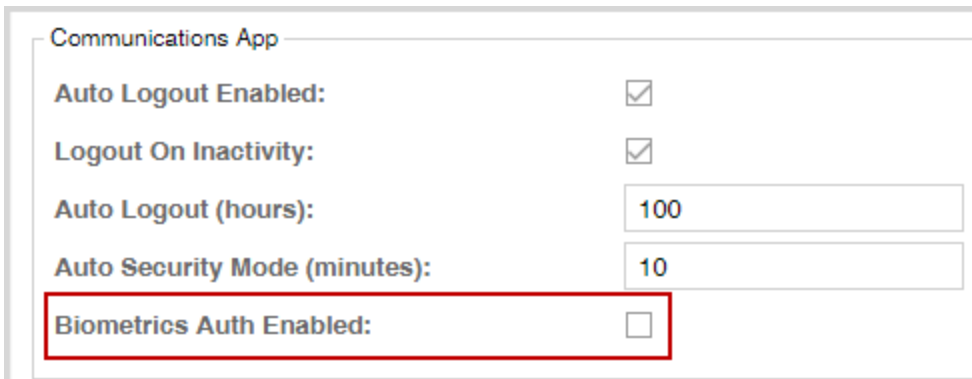
Enabling and Disabling Biometric Authentication

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



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

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



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

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 \(Android\)](#)

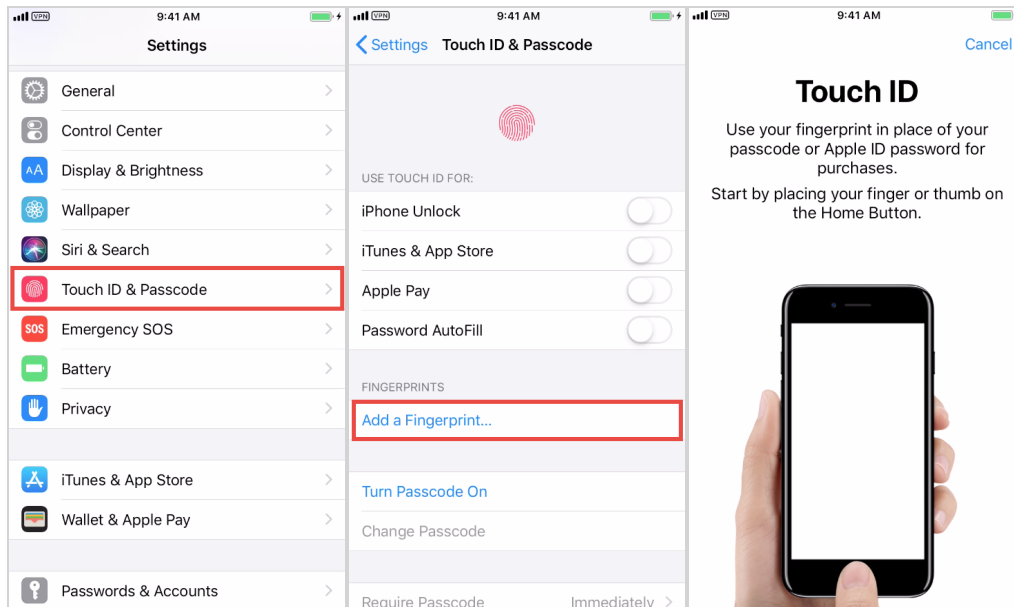
Log in by Touch ID (iOS)

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 and login with Touch ID.

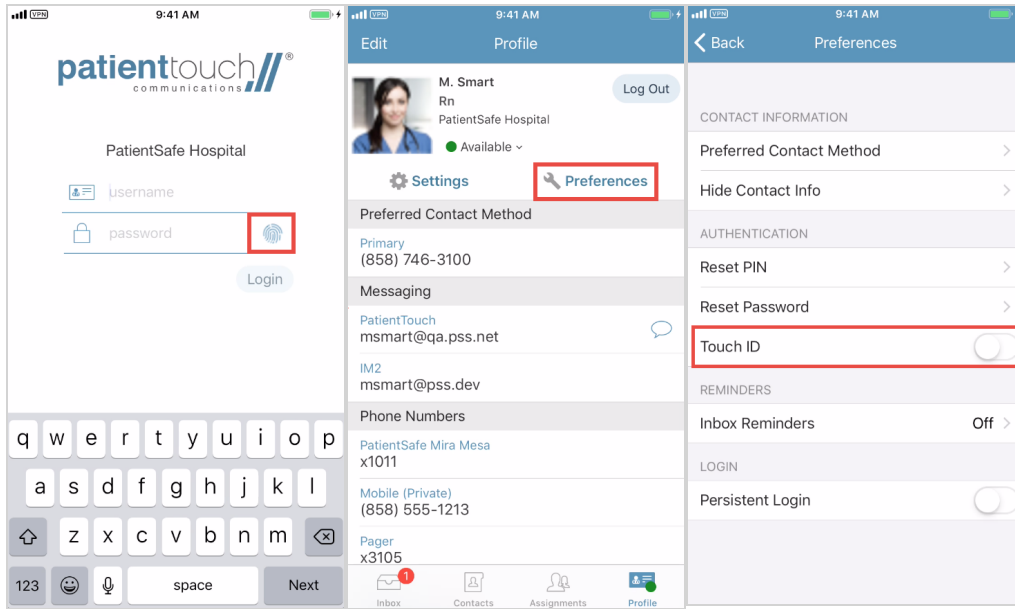
Note You will need your Apple ID to complete the fingerprint sign in process.



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.
4. Follow all prompts (including the ones to enter a passcode).
5. You will also need to enter your Apple ID password.

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

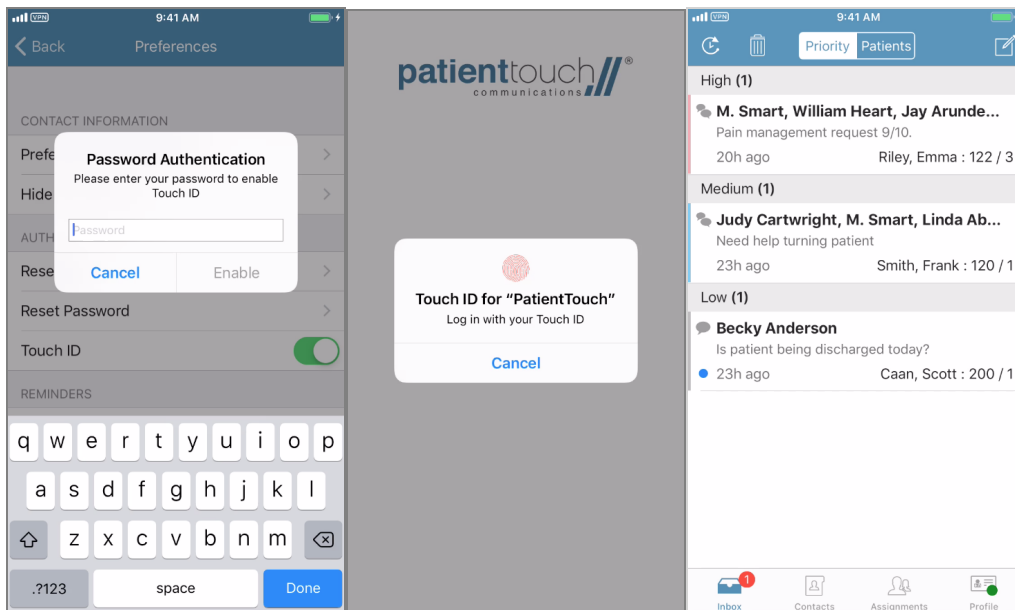
Note If you do not see a thumbprint on the password line, your facility may not have this feature enabled.



6. Log into PatientTouch Communications with your username and password.

7. Navigate to the **Profile** tab and touch **Preferences**.

8. Select **Touch ID**.



9. Enter your PatientTouch password to enable **Touch ID**.

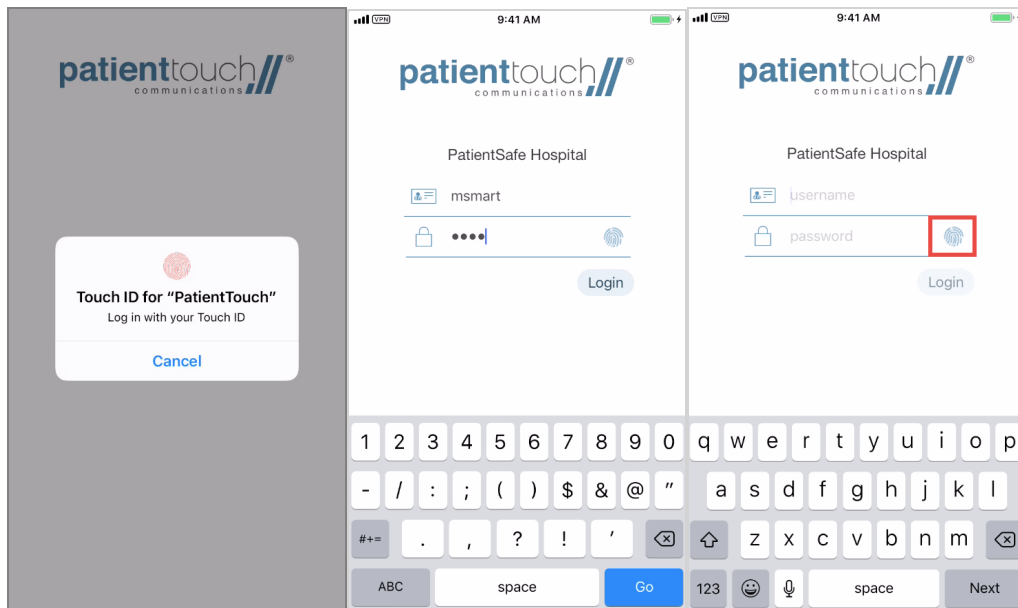
10. An alert displays, asking you to use **Touch ID**.

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

12. 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**.

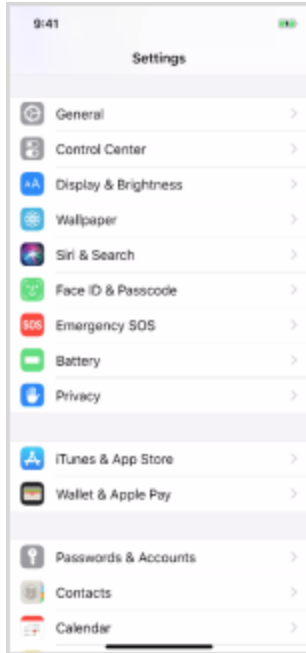
Log in by Face ID (iOS)

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

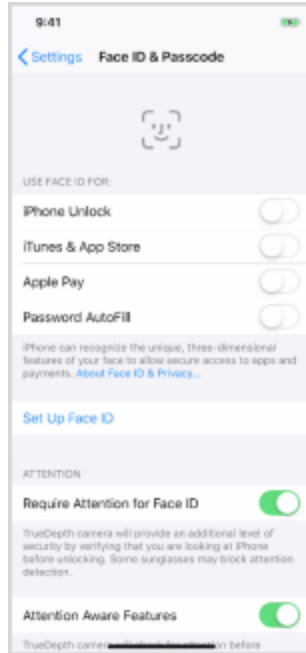
- iPhone 6, 7, 8 supports Touch ID
- **iPhone X** supports Face ID

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

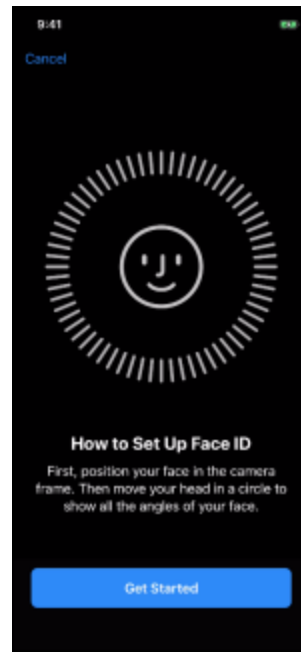
Note You will need your Apple ID to complete the fingerprint sign in process.



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



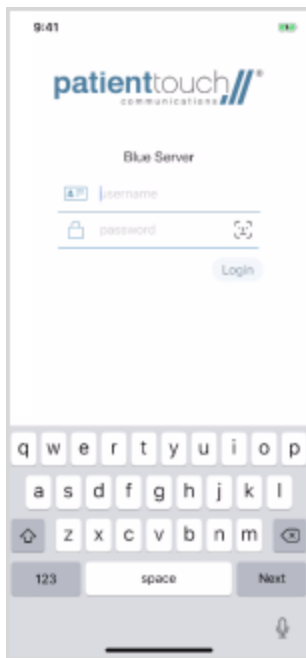
2. Select **Set Up Face ID.**



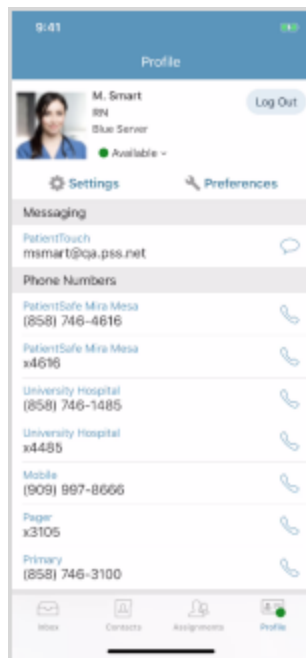
3. Place your face in the camera frame, repeating as the instructions allow, and follow the prompts.

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

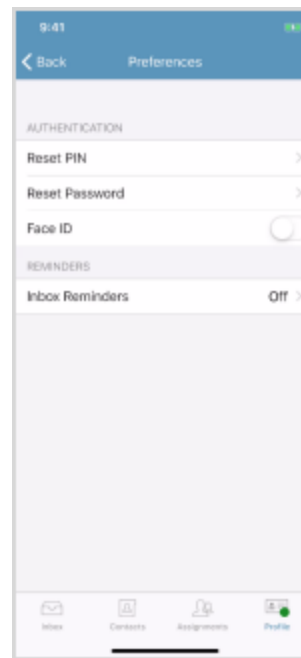
Note If you do not see a thumbprint on the password line, your facility may not have this feature enabled.



4. Log into PatientTouch Communications.



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

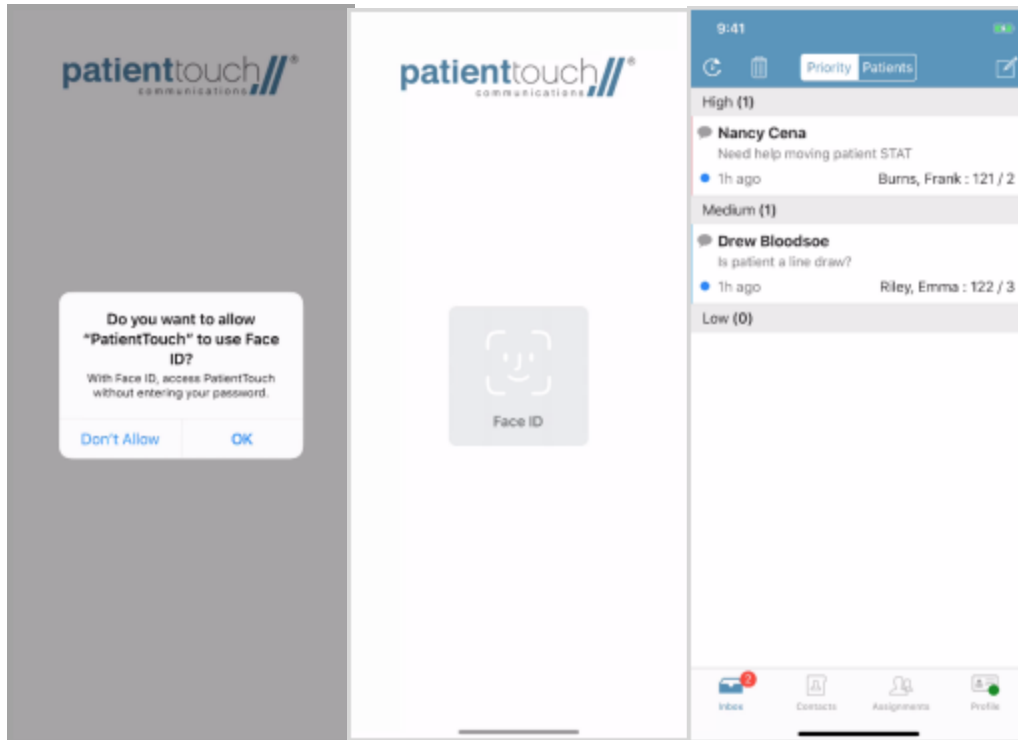


6. Select **Face ID** and enter your password to enable the

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**.

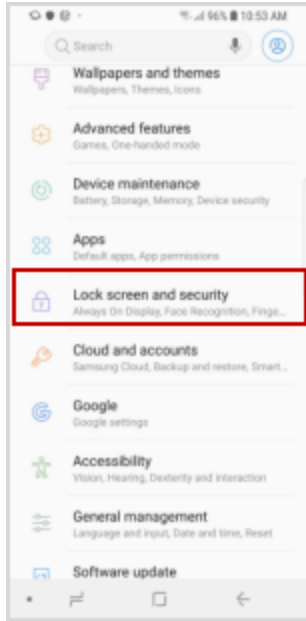
3. Place your face in front of the camera and wait for PatientTouch Communications to log you in.

4. You automatically advance to the PatientTouch Communications Inbox.

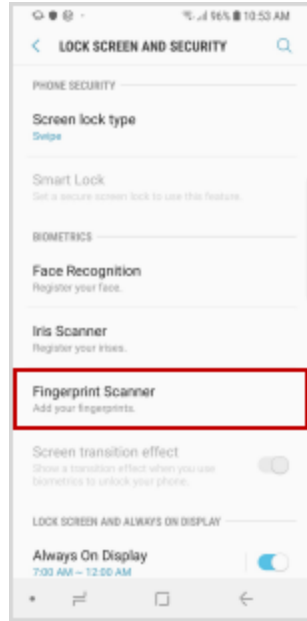
Log in with Fingerprint Sign In (Android)

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.

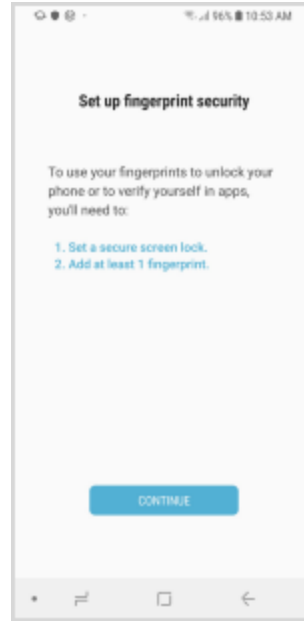
Users must have Fingerprint Sign In configured on their device to use this feature. Use the instructions below to add a fingerprint.



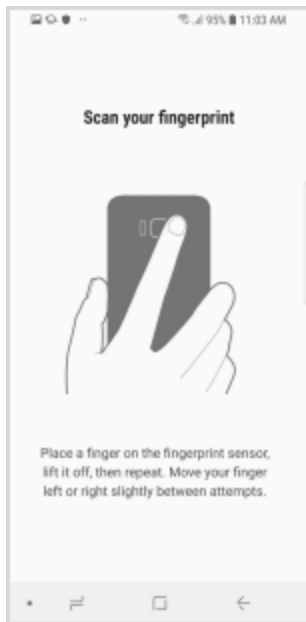
1. Access **Settings** on your Android device.
2. Select **Lock screen and security**.



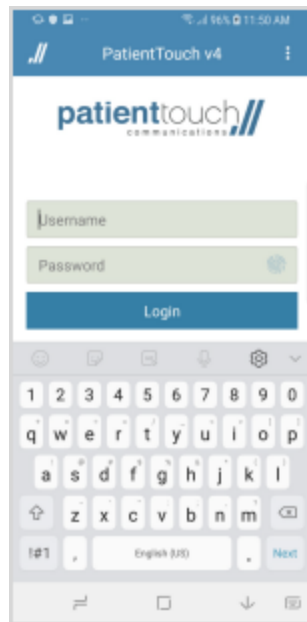
3. Touch **Fingerprint Scanner**.



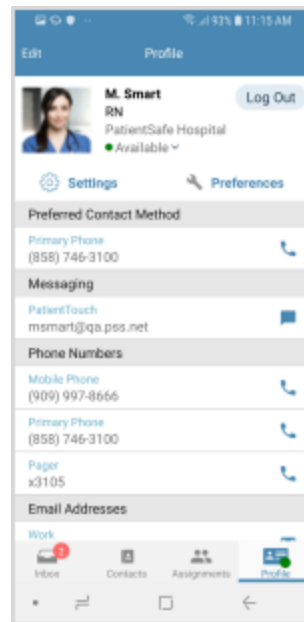
4. Touch **Continue** and add a password or pin.
5. Follow all prompts.



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



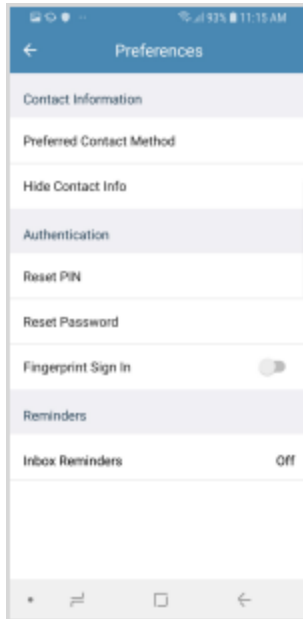
8. After setting up your fingerprint, you should see a blue thumbprint in the password line of the PatientTouch Communications application.



10. Access the Profile>Preferences screen.

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

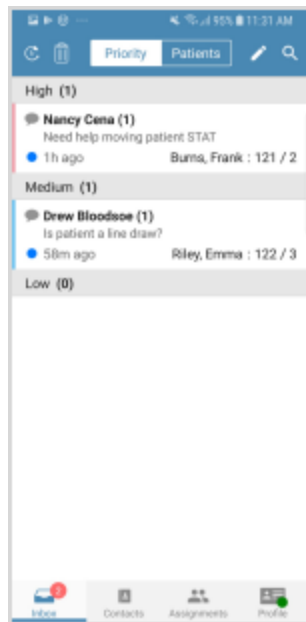
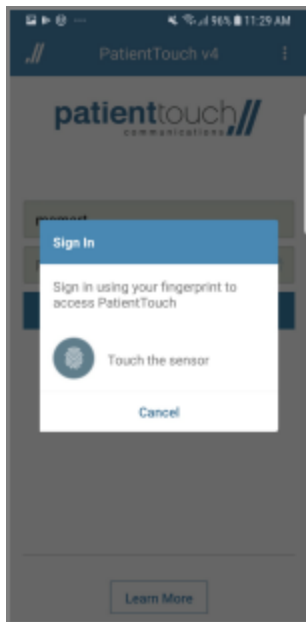
Note If you do not see a thumbprint on the password line, your facility may not have this feature enabled.



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

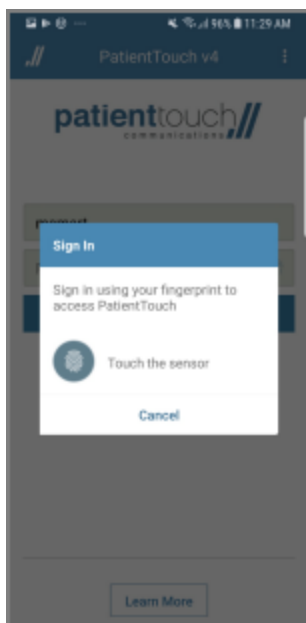
Log out and log back in. Use the instructions below to log in using Fingerprint Sign In.

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

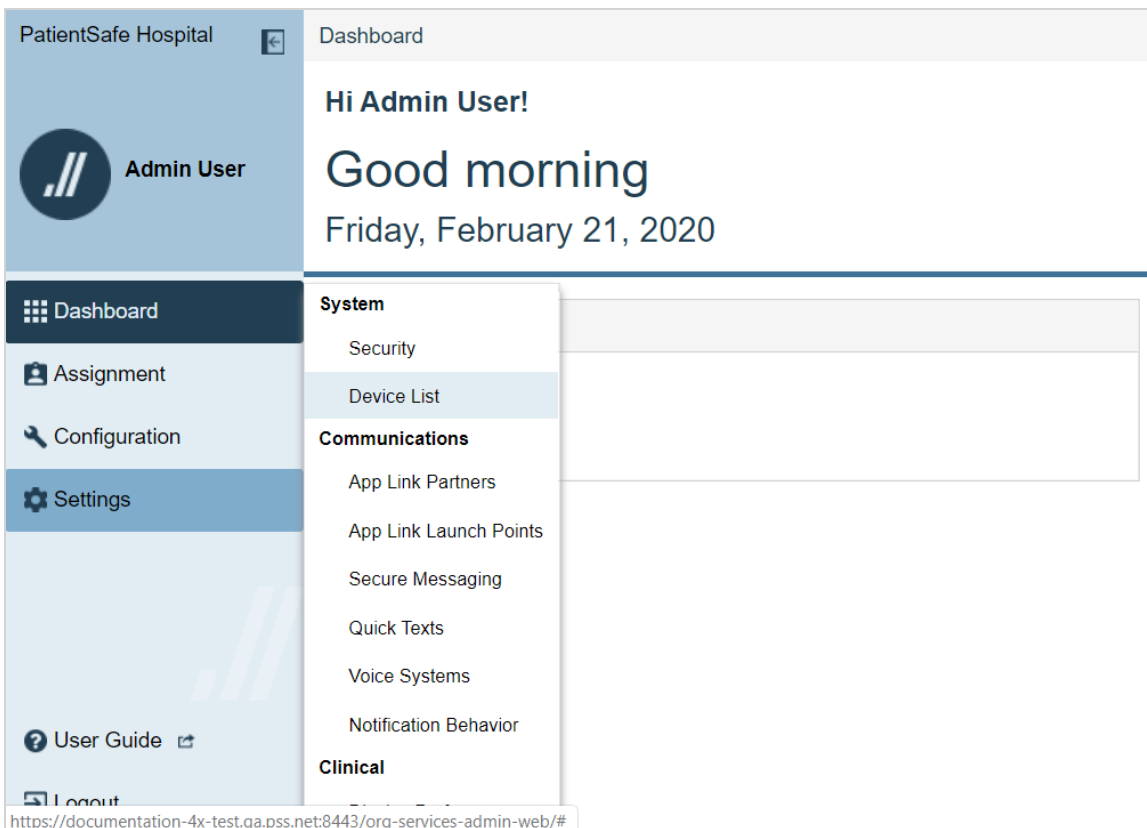


1. Touch **Cancel** on the Fingerprint Sign In alert to log in with your user name and password.
2. Enter your user name and password.
3. Touch Login.
4. Or, touch the fingerprint icon, to bring up the alert and log in with Fingerprint Sign In.

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**.



2. Select the facility for which you want to manage handhelds.
3. The columns in the device list are customizable. Below is a description of some of the columns that display.

- 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.

PatientSafe Hospital

Device List Facility: All

Client Identifier	A...	St...	Last Login	Last Used By	Application	P... V...	O..	OS V...
HH_3C289648-7...	All...	Offiii	09/10/20...	jcartwig...	PatientT...	4...	i...	1...
AB_027a82f5ada...	N...	Offiii	06/12/20...	mwelby (...)	PatientT...	4...	A...	9
HC_31DCFCF6-...	N...	Offiii	04/16/20...	rabercro...	PatientT...	4...		1...
HH_6F248284-D...	All...	Offiii	09/18/20...	jcartwig...	PatientT...	4...	i...	1...
HC_A0177611-36...	N...	Offiii	05/09/20...	banders...	PatientT...	4...	i...	1...
HB_A0177611-36...	N...	Offiii	04/25/20...	jarundell...	PatientT...	4...	i...	1...
HB_31DCFCF6-...	N...	Offiii	04/17/20...	sjohnson...	PatientT...	4...	i...	1...
HH_F4EB9256-D...	All...		04/16/20...	ehuang (...)	PatientT...	4...		1...
HH_106E1687-E...	All...	Offiii	04/16/20...	pssadmi...	PatientT...	4...	i...	1...
HH_AEFE5473-2...	All...		04/18/20...	ehuang (...)	PatientT...	4...	i...	1...
HB_FCF24289-1...	N...	Offiii	06/24/20...	mjones (...)	PatientT...	4...	i...	1...
HC_FCF24289-1...	N...	Offiii	09/16/20...	msmart (...)	PatientT...	4...	i...	1...
HC_AAB226F2-C...	N...		05/08/20...	ehuang (...)	PatientT...	4...	i...	1...
HH_A09B1ACB-2...	All...	Offiii	05/07/20...	labernat...	PatientT...	4...	i...	1...
HH_D8229DD5-2...	All...	Offiii	06/25/20...	jcartwig...	PatientT...	4...	i...	1...
HC_106A4998-F...	N...	Offiii	05/07/20...	labernat...	PatientT...	4...	i...	1...
HB_48376154-A8...	N...	Offiii	07/09/20...	cnurse (...)	PatientT...	4...	i...	1...
HC_30934E37-4...	N...	Offiii	05/10/20...	ncena (...)	PatientT...	4...	i...	1...
HH_7667A955-3...	All...	Offiii	06/04/20...	labernat...	PatientT...	4...	i...	1...

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

Logout

Page 1 of 2 | 1 - 25 of 26 | Broadcast | Authorization

- 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.

PatientSafe Hospital

Device List Facility:

Client Identifier	A...	St...	Last Login	Last Used By	Application	P... V...	O...	OS V...
HH_3C289648-7...	↑	Sort Ascending	09/10/20...	jcartwig...	PatientT...	4...	i...	1...
AB_027a82f5ada...	↓	Sort Descending	06/12/20...	mweiby (...)	PatientT...	4...	A...	9
HC_31DCFCF6...		Columns	<input checked="" type="checkbox"/> Client Identifier <input checked="" type="checkbox"/> Authorization <input type="checkbox"/> Facility <input checked="" type="checkbox"/> Status <input checked="" type="checkbox"/> Last Login <input checked="" type="checkbox"/> Last Used By <input type="checkbox"/> Authorized Date/Time <input type="checkbox"/> Authorizing User <input checked="" type="checkbox"/> Application <input checked="" type="checkbox"/> PSS Version <input checked="" type="checkbox"/> OS <input checked="" type="checkbox"/> OS Version <input type="checkbox"/> PSS Jacket S/N <input type="checkbox"/> PSS Firmware <input type="checkbox"/> IP Address <input type="checkbox"/> Soft Scan Status					
HH_6F248284-D...	All...				PatientT...	4...	i...	1...
HC_A0177611-36...	N...				PatientT...	4...	i...	1...
HB_A0177611-36...	N...				PatientT...	4...	i...	1...
HB_31DCFCF6...	N...				PatientT...	4...	i...	1...
HH_F4EB9256-D...	All...				PatientT...	4...		1...
HH_106E1687-E...	All...				PatientT...	4...	i...	1...
HH_AEFE5473-2...	All...				PatientT...	4...	i...	1...
HB_FCF24289-1...	N...				PatientT...	4...	i...	1...
HC_FCF24289-1...	N...				PatientT...	4...	i...	1...
HC_AAB226F2-C...	N...				PatientT...	4...	i...	1...
HH_A09B1ACB-2...	All...				PatientT...	4...	i...	1...
HH_D8229DD5-2...	All...				PatientT...	4...	i...	1...
HC_106A4998-F...	N...				PatientT...	4...	i...	1...
HB_48376154-A8...	N...				PatientT...	4...	i...	1...
HC_30934E37-4...	N...				PatientT...	4...	i...	1...
HH_7667A955-3...	All...		06/04/20...	labernat...	PatientT...	4...	i...	1...

6. 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

Client Identifier	A...	Status	Last Login	Last Used By	Application	PSS V...	O..	OS V...
HH_3C289648-7C7A-49...	All...	Offline	09/10/2019 0...	jcartwright (J...	PatientTouch...	4...	i...	12.2
AB_027a82f5ada6b61d	N...	Offline	06/12/2019 0...	mwelby (Mar...	PatientTouch...	4...	A...	9
HC_31DCFCF6-BA0C-4...	N...	Offline	04/16/2019 0...	rabercrombie ...	PatientTouch...	4...	i...	12...
HH_6F248284-DE71-490...	All...	Offline	09/18/2019 1...	jcartwright (J...	PatientTouch...	4...	i...	12...
HC_A0177611-367D-4D...	N...	Offline	05/09/2019 0...	banderson (B...	PatientTouch...	4...	i...	12.2
HB_A0177611-367D-4D1...	N...	Offline	04/25/2019 1...	jarundell (Jay ...	PatientTouch...	4...	i...	12.2
HB_31DCFCF6-BA0C-4...	N...	Offline	04/17/2019 1...	sjohnson (Sa...	PatientTouch...	4...	i...	12...
HH_F4EB9256-D031-40...	All...	Offline	04/16/2019 0...	ehuang (Ed H...	PatientTouch...	4...	i...	12.2
HH_106E1687-E0C0-44...	All...	Offline	04/16/2019 1...	pssadmin (Ad...	PatientTouch...	4...	i...	12.2
HH_AEFE5473-26F1-4D...	All...	Offline	04/18/2019 1...	ehuang (Ed H...	PatientTouch...	4...	i...	12.2
HB_FCF24289-1B5A-48...	N...	Offline	06/24/2019 1...	mjones (Mary...	PatientTouch...	4...	i...	12.2
HC_FCF24289-1B5A-48...	N...	Offline	09/16/2019 0...	msmart (M. S...	PatientTouch...	4...	i...	12.2
HC_AAB226F2-C5C3-47...	N...	Offline	05/08/2019 0...	ehuang (Ed H...	PatientTouch...	4...	i...	12.2
HH_A09B1ACB-233A-4A...	All...	Offline	05/07/2019 1...	labernathy (Li...	PatientTouch...	4...	i...	12.2
HH_D8229DD5-2417-4B...	All...	Offline	06/25/2019 0...	jcartwright (J...	PatientTouch...	4...	i...	12...
HC_106A4998-F10D-496...	N...	Offline	05/07/2019 1...	labernathy (Li...	PatientTouch...	4...	i...	12.2
HB_48376154-A8CC-4E...	N...	Offline	07/09/2019 1...	cnurse (Cher...	PatientTouch...	4...	i...	12...
HC_30934E37-44C9-47F...	N...	Offline	05/10/2019 0...	ncena (Nancy...	PatientTouch...	4...	i...	12.2
HH_7667A955-3DCF-47...	All...	Offline	06/04/2019 1...	labernathy (Li...	PatientTouch...	4...	i...	12...
HC_48376154-A8CC-4E...	N...	Offline	10/02/2019 1...	jcartwright (J...	PatientTouch...	4...	i...	12...
HC_5A600D48-11E3-4F...	N...	Offline	06/25/2019 1...	jcartwright (J...	PatientTouch...	4...	i...	12...
AC_027a82f5ada6b61d	N...	Offline	10/31/2019 0...	msmart (M. S...	PatientTouch...	4...	A...	9
HH_FFDA21A3-9672-41...	All...	Offline	07/02/2019 1...	ehuang (Ed H...	PatientTouch...	4...	i...	12...




 Page 1 of 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: Send a message to all handhelds.

Online: Send a message to only the handhelds that are online.

View Scheduled: View scheduled broadcast messages.

2. After selecting **All** or **Online** from above, use the following information to complete the fields.

Facility: Select the facility to receive the message, or, select All.

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

Select the Priority: Low, Medium, or High.

Message: 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

3. Click **Send** to send the message right away.
4. 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

5. Click **Schedule**.

Authorization

1. Click **Authorization** and select one of the following settings.

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

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

Clean Up List

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

Remove Selected: Click to remove a selected device from the Device List.

By Last Login: Click 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:

The screenshot shows a dialog box titled "Device Details". It contains the following elements:

- A "Facility:" label followed by a dropdown menu showing "PatientSafe Mira Mesa".
- The text "Remove devices with Last Login date before:".
- A "Date:" label followed by a date input field containing "07/09/18" and a calendar icon.
- The text "Devices with activity prior to selected will also be removed."
- At the bottom, there are two buttons: "Cancel" on the left and "Clean Up" on the right.

Communications

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

Shared Secret Single Sign On (SSO)

The Shared Secret Single Sign-On feature enables third party mobile applications to launch and use the PatientTouch (PT) application w/o having to log in again (inbound SSO, i.e. Epic Rover -> PatientTouch), or the PatientTouch application to launch third party applications (outbound SSO, i.e. PatientTouch -> AirStrip One).

Customers must contact PatientSafe Solutions Tech Ops team to configure their servers and get the encryption configuration in order to fill out the information below.

App Link Partners

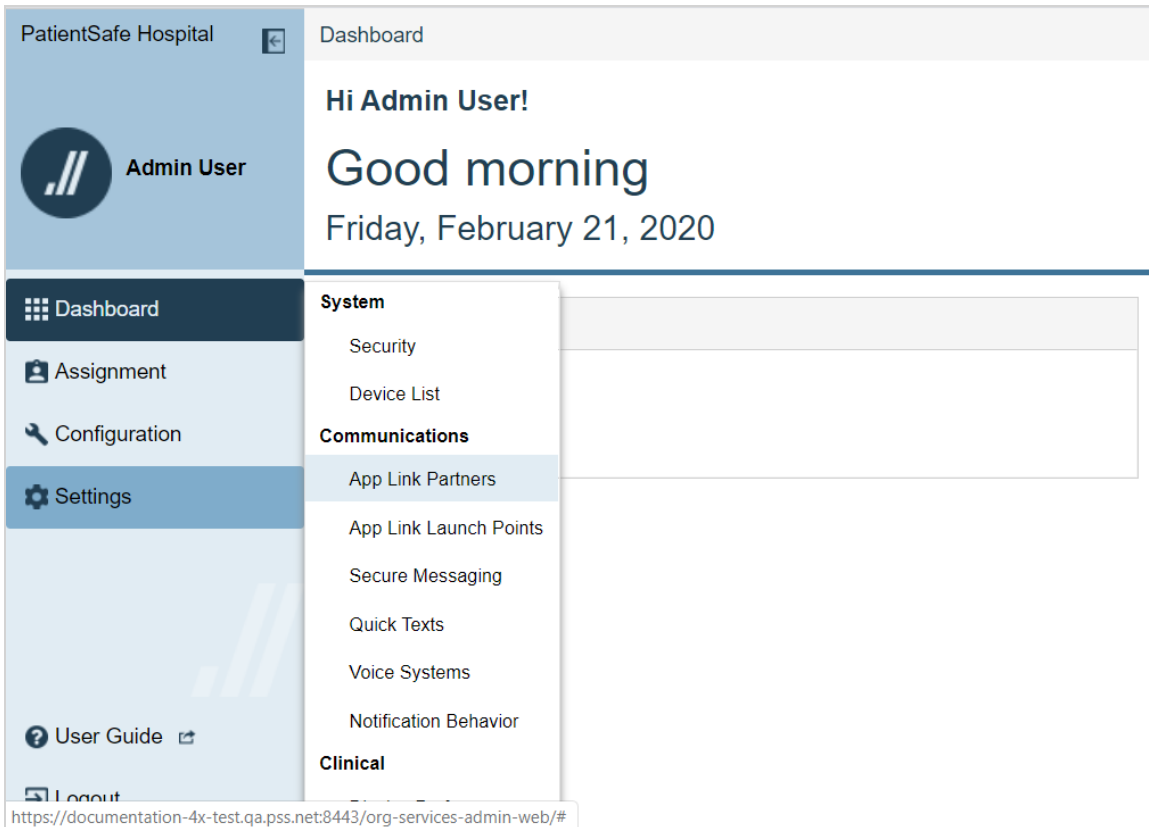
Outbound from PatientTouch

Note Refer to the next topic, App Link Launch Points, for additional outbound instructions.

You must have an app link sso partner and shared secret password to link PatientTouch to Airstrip One.

To configure App Link Partners, please follow the instructions below.

1. Navigate to the tool bar on the left-hand side and click Settings>App Link Partners.



The screenshot shows the PatientSafe Hospital Admin User dashboard. The top navigation bar includes 'PatientSafe Hospital' and 'Dashboard'. The main content area displays a greeting: 'Hi Admin User!', 'Good morning', and 'Friday, February 21, 2020'. A left-hand navigation menu is open, showing options like 'Dashboard', 'Assignment', 'Configuration', 'Settings', 'User Guide', and 'Logout'. The 'Settings' menu is expanded, showing sub-sections: 'System' (Security, Device List), 'Communications' (App Link Partners, App Link Launch Points, Secure Messaging, Quick Texts, Voice Systems, Notification Behavior), and 'Clinical'. The 'App Link Partners' option is highlighted.

2. Click **Create New**.

The screenshot shows the 'App Link Partners' page in the PatientSafe Hospital interface. The sidebar on the left contains navigation links: Dashboard, Assignment, Configuration, Settings (which is currently selected and highlighted in dark blue), User Guide, and Logout. The main content area features a table with the following columns: 'Name ↑', 'Partner Name', 'Description', 'Edit', and 'Delete'. The table is currently empty. At the bottom right of the table area, there is a 'Create New' button, which is highlighted with a red rectangular box. A 'Refresh' button is also visible at the bottom left of the table area.

3. Enter the name of the external system used to encrypt the data. Airstrip One is one system. However, other external systems may be used.
4. Enter the Partner Name, which is the partner name for PSS from the other application's perspective.
5. Enter a Description.
6. Secret is an encrypted password. Facilities need to contact PatientSafe Solutions Tech Ops team for this information.
7. Click **Save**.

The screenshot displays the 'App Link Partner' configuration page in the PatientSafe Hospital Admin User interface. The left sidebar contains navigation options: Dashboard, Assignment, Configuration, Settings (highlighted), User Guide, and Logout. The main content area shows the following form fields:

- Name: Airstrip One
- Partner Name: PSS
- Description: (empty)
- Secret: (masked with dots)

At the bottom of the form, there are four buttons: Back, Delete, Save & Create New, and Save. The Save button is highlighted with a red border.

8. The App Link Partner displays.

The partner (Airstrip One) can now be selected for the App Link Launch Points. See the section below.

PatientSafe Hospital

App Link Partners

Search

Name ↑	Partner Name	Description	Edit	Delete
Airstrip One	PSS			

Admin User

Dashboard

Assignment

Configuration

Settings

User Guide

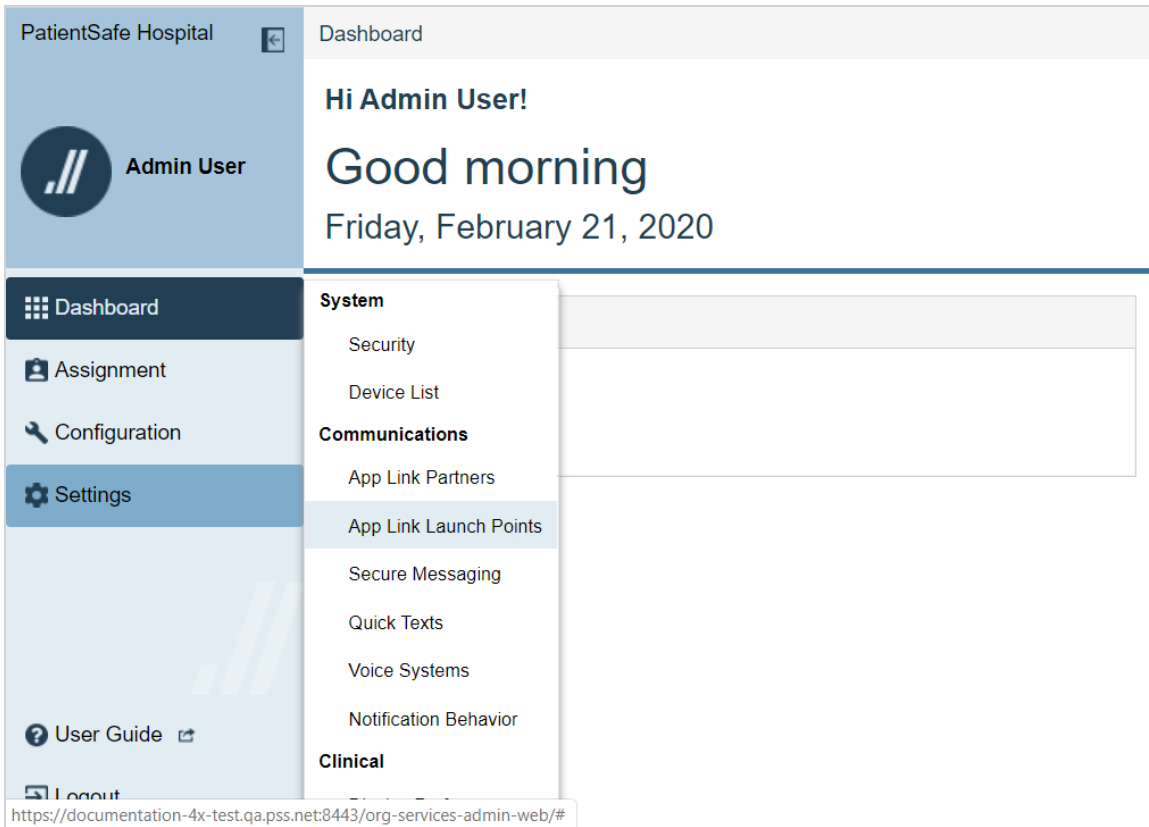
Logout

Refresh

Create New

App Link Launch Points

1. Navigate to the tool bar on the left-hand side and click Settings>App Link Launch Points.



2. Click **Create New**.

PatientSafe Hospital

Facility: All Clinical Profile: All Search

Name ↑	Type	Description	Link	Edit	Delete
Epic...	User	User, Mira Mes...	epichaiku://launch/loginn...		
Epic...	Patient List	Patient List, Mi...	epichaiku://launch/loginn...		

Admin User

Dashboard

Assignment

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Settings

User Guide

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Refresh

Create New

3. Complete the following fields according to the descriptions below:

- Name:** The title of the button to be displayed in the iOS/Android clients (ex.: "Airstrip")
- Link:** The URI/URL that the button should open to when you touch it (ex: epicrover://patientlist)
- Description:** Enter a description of the launch point.
- 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
 - User: contact-detail screen (individual contact)
- Partner:** Select Airstrip One

4. Click **Save**.

PatientSafe Hospital

Admin User

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

App Link Launch Point

Details

Name:

Link: (Supported variables: \$patientmrn and \$username)

Description:

Type:

Partner:

Available To (Clinical Profiles)

Clinical Profile ↑	Facilities	Remove
This app link launch point is not available to any clinical profiles.		

App Link Launch Points

Inbound to PatientTouch

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. Have PatientSafe Solutions Tech Ops Team setup each inbound partner (eg. Epic) and adjust authentication configuration to include the shared_secret type with partner name and shared secret password.
2. Once configured, customers can configure Epic with the desired links now including the partner and encrypted payload using the same shared secret password.
3. Refer to Epic or other 3rd party documentation with regards to Haiku, Rover, or other app configuration.
4. The username of the logged in user is required to be in the encrypted payload of the link.

Configuration in Epic ex:

```
patienttouch://?PartnerName=partner1&siteid=notused&payload=
crypturl field: {ad=%EPICUSERID%}
```

URL in app when user clicks button in Epic ex:

```
patienttouch://?PartnerName=partner1&siteid=notused&payload=IGfzaizl3KO4GANXKAOneci2omrRWL2H5A7
gqkLTm7TfCFWDQdpbfCYqZbBNtva
```

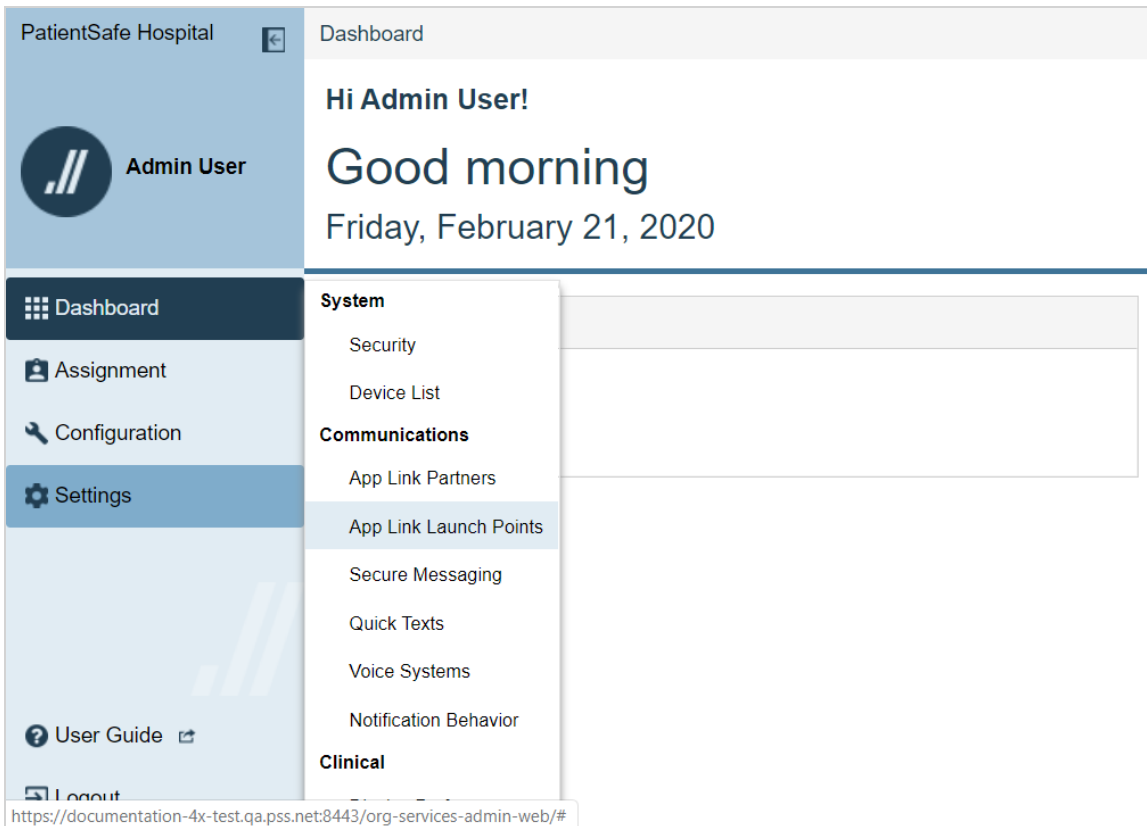
Note Please contact PatientSafe Solutions Technical Support Team for the Single Sign On Configuration document, which contains detailed instructions on how to configure this feature for your facility.

App Link Launch Points

Note This configuration is for users who are not utilizing SSO.

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**.



The screenshot shows the PatientSafe Hospital Admin User interface. The top navigation bar includes 'PatientSafe Hospital' and 'Dashboard'. The main content area displays a greeting: 'Hi Admin User!', 'Good morning', and 'Friday, February 21, 2020'. A left-hand navigation menu is open, showing options: Dashboard, Assignment, Configuration, Settings (highlighted), User Guide, and Logout. A sub-menu is displayed under 'Settings', listing categories: System (Security, Device List), Communications (App Link Partners, App Link Launch Points (highlighted), Secure Messaging, Quick Texts, Voice Systems, Notification Behavior), and Clinical.

2. Click **Create New**.

PatientSafe Hospital

Facility: All Clinical Profile: All Search

Name ↑	Type	Description	Link	Edit	Delete
Epic H...	User	User, Mira Mesa & T...	epichaiku://launch/loginname/Sus...		
Epic H...	Patient List	Patient List, Mira Me...	epichaiku://launch/loginname/Sus...		

Admin User

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Refresh

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 Haiku”)
- Link:** The URI/URL that the button should open when you touch it (ex: epicover://patientlist)
- Description:** Enter a description of the launch point.
- 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
 - User : contact-detail screen (individual contact)

PatientSafe Hospital

Admin User

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App Link Launch Point

Details

Name:

Link: (Supported variables: \$patientmrn and \$username)

Description:

Type:

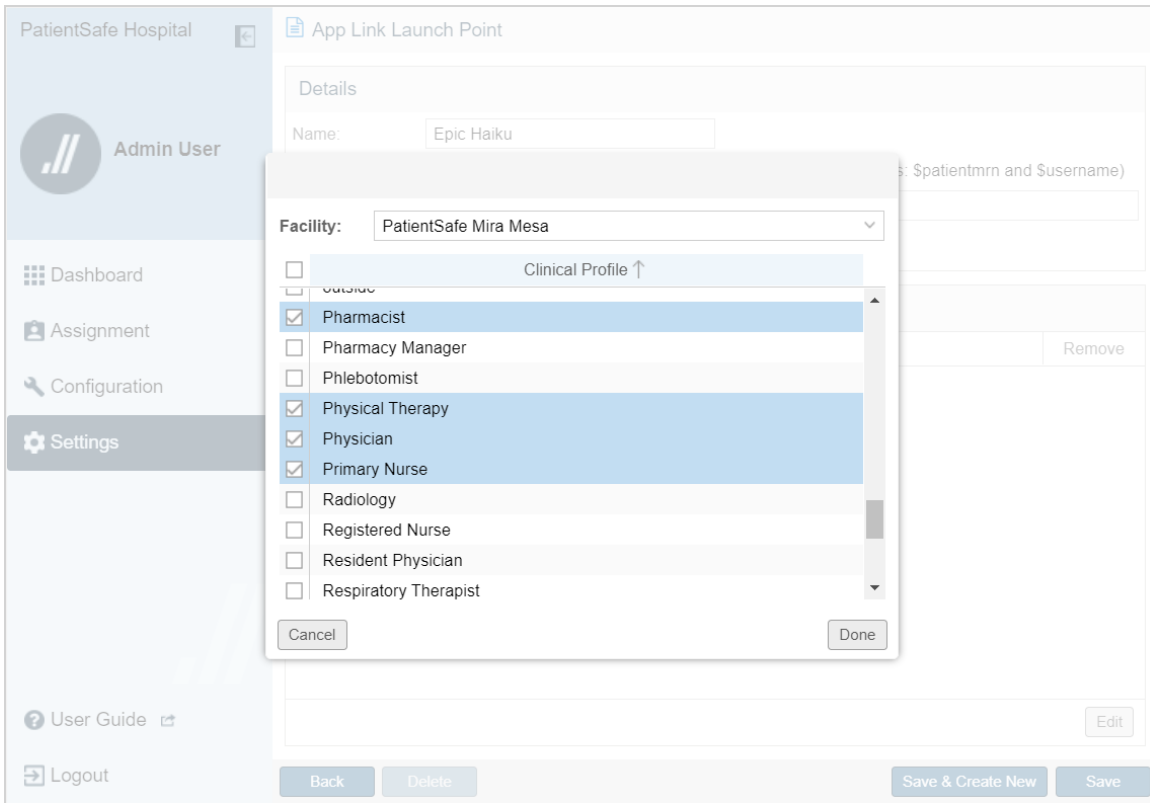
Available To (Clinical Profiles)

Clinical Profile ↑	Facilities	Remove
This app link launch point is not available to any clinical profiles.		


Edit


Back Delete Save & Create New Save

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










6. Click **Save**.

PatientSafe Hospital 



Admin User

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

App Link Launch Point

Details








Name:

Link: (Supported variables: \$patientmtn and \$username)

Description:

Type:

Available To (Clinical Profiles)

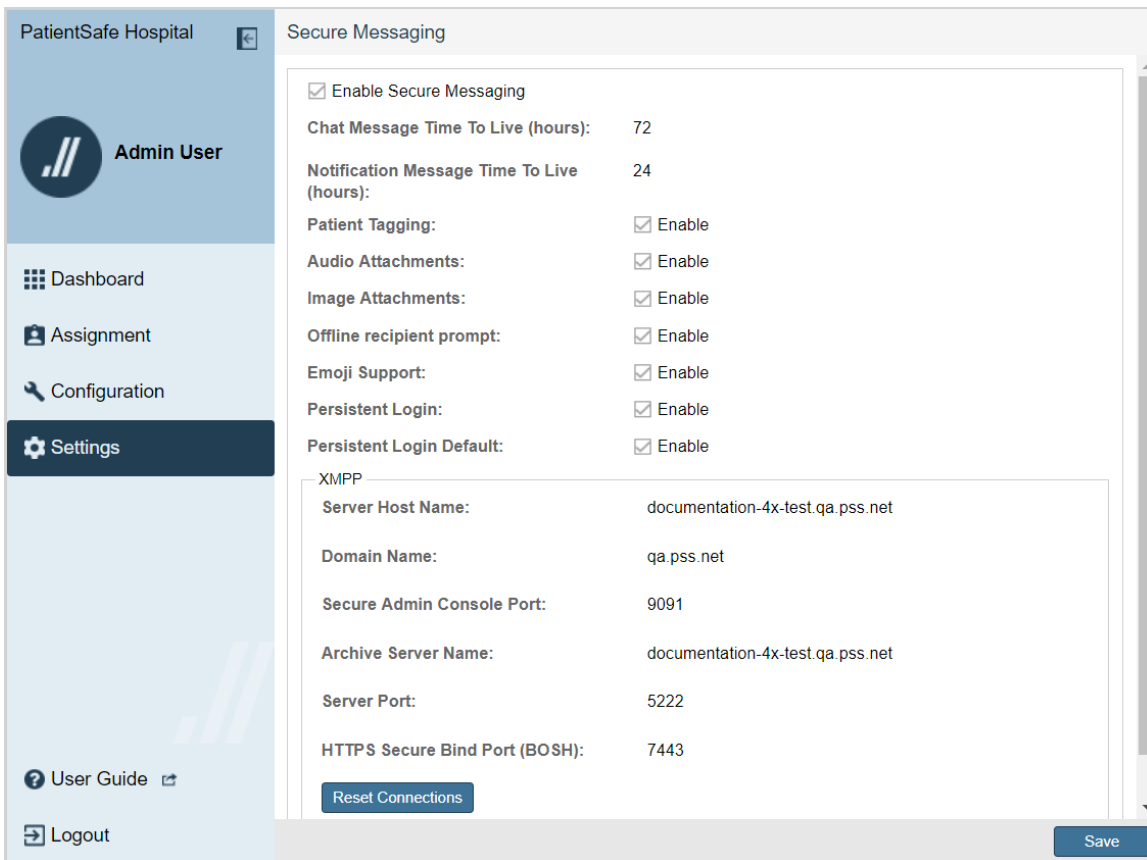
Clinical Profile ↑	Facilities	Remove
Pharmacy Manager	PatientSafe Mira Mesa	
Physical Therapy	PatientSafe Mira Mesa	
Physician	PatientSafe Mira Mesa	
Primary Nurse	PatientSafe Mira Mesa	
Radiology	PatientSafe Mira Mesa	
Registered Nurse	PatientSafe Mira Mesa	
Respiratory Therapist	PatientSafe Mira Mesa	

Secure Messaging

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

The screenshot shows the PatientSafe Hospital Admin User Dashboard. The top header includes the hospital name and a back arrow. The main content area displays a personalized greeting: "Hi Admin User! Good morning Friday, February 21, 2020". A left-hand navigation menu is visible, with "Settings" selected. A settings menu is open, listing categories: System (Security, Device List), Communications (App Link Partners, App Link Launch Points, Secure Messaging, Quick Texts, Voice Systems, Notification Behavior), and Clinical. The "Secure Messaging" option is highlighted. At the bottom, a URL is visible: <https://documentation-4x-test.qa.pss.net:8443/org-services-admin-web/#>

3. The *Secure Messaging* screen displays.



PatientSafe Hospital

Admin User

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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

4. Use the table below to complete the fields.

Enable Secure Messaging: When checked, the *Unified Inbox* 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.

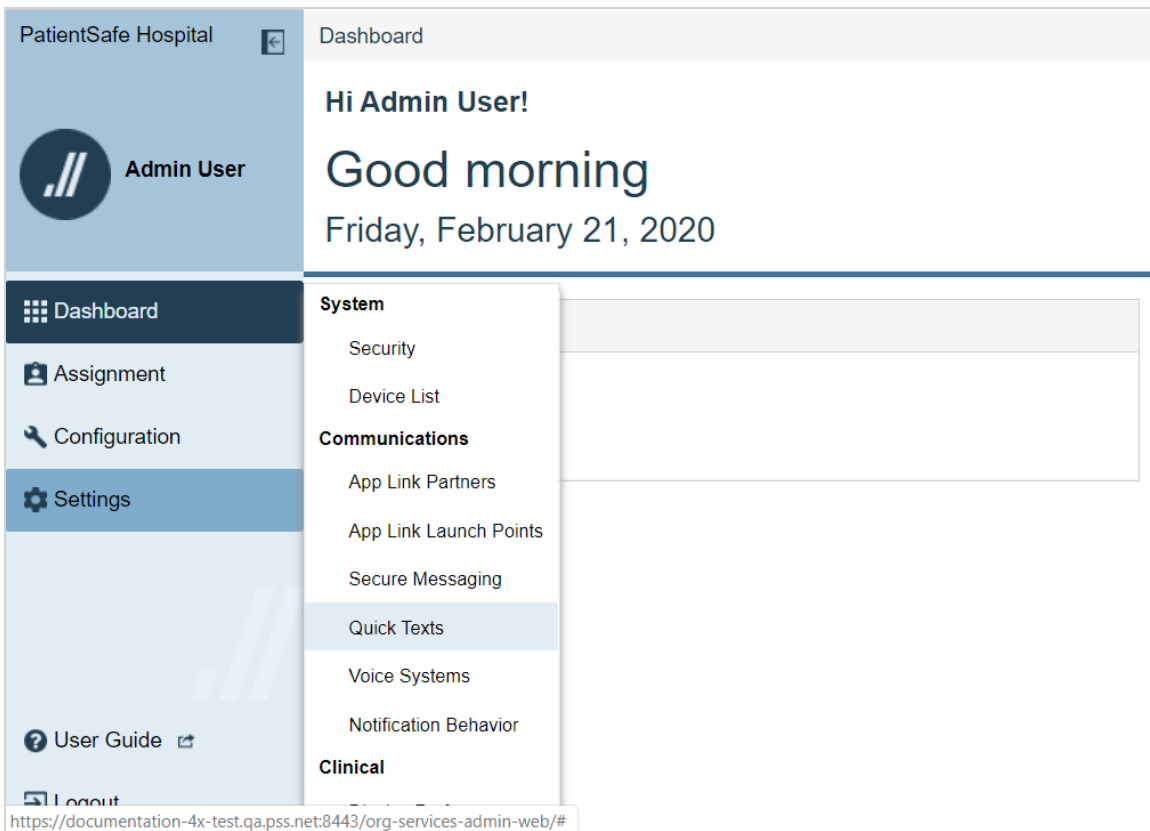
- Persistent Login:** This setting allows system Administrators to choose whether Persistent Login is available to BYOD users.
- Persistent Login Default:** This setting allows system Administrators to choose whether Persistent Login is the default for BYOD users. However, user settings will override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

5. Click **Save**.

Quick Text Messages

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

1. 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.

PatientSafe Hospital

Admin User

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Refresh

Facility: All Clinical Profile: All Search

Shortcut Texts

Message Text	Edit	Delete
Accepted		
Acknowledge		
Be right there		
Busy, available in		
I am busy		

Create New

SMS Page Messages

Message Text	Edit	Delete
Cardiopulmonary consult request, please call back to number below.		
Infectious Disease consult request, please call back to number below.		
Need clarification for medication order for patient		
Neuro consult request, please call back to number below.		
Orthopedic consult request, please call back to number below.		

Create New

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

PatientSafe Hospital

Admin User

Dashboard

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Logout

Shortcut Text

Details

Quick Text Script:

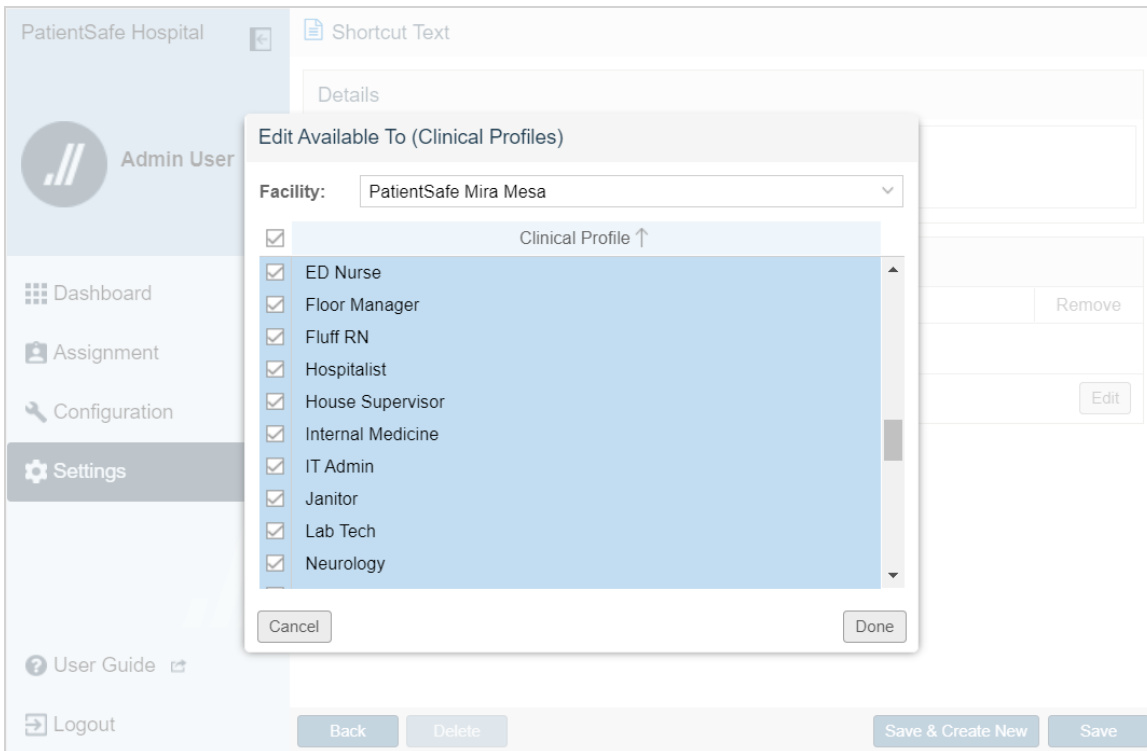
Available To (Clinical Profiles)

Clinical Profile ↑	Facilities	Remove
This quick text message is available to all profiles in all facilities.		

Edit

Back Delete Save & Create New Save

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

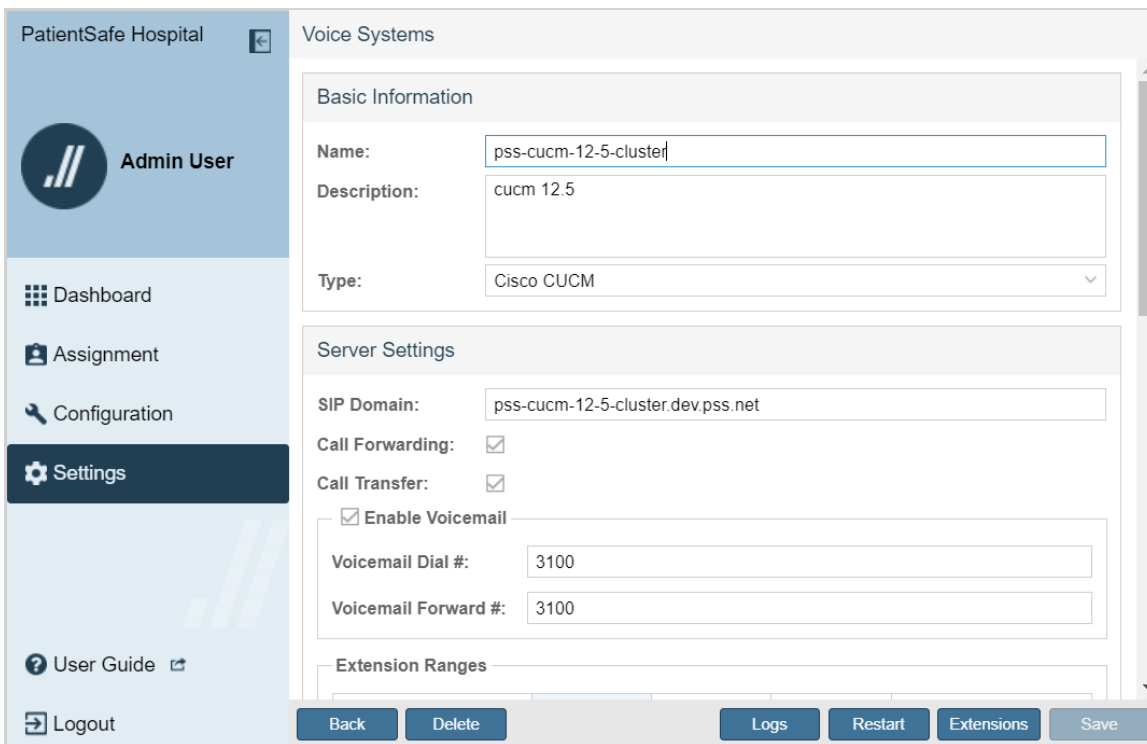
Customers will need to work with a PatientSafe Solutions representative to set up Voice Systems. Please refer to the information below for information purposes only.

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

2. Click **Create New**.

Name ↑	Description	Type	SIP Domain	Edit
doc server frees...		PSS Voice Server	documentation-4...	

3. The **Basic Information** and **Server Settings** tables display. 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 (Freeswitch).

SIP Domain: Enter the IP address of the SIP Domain.

Call Forwarding: Enable or disable Call Forwarding.

Call Transfer: Enable or disable Call Transfer.

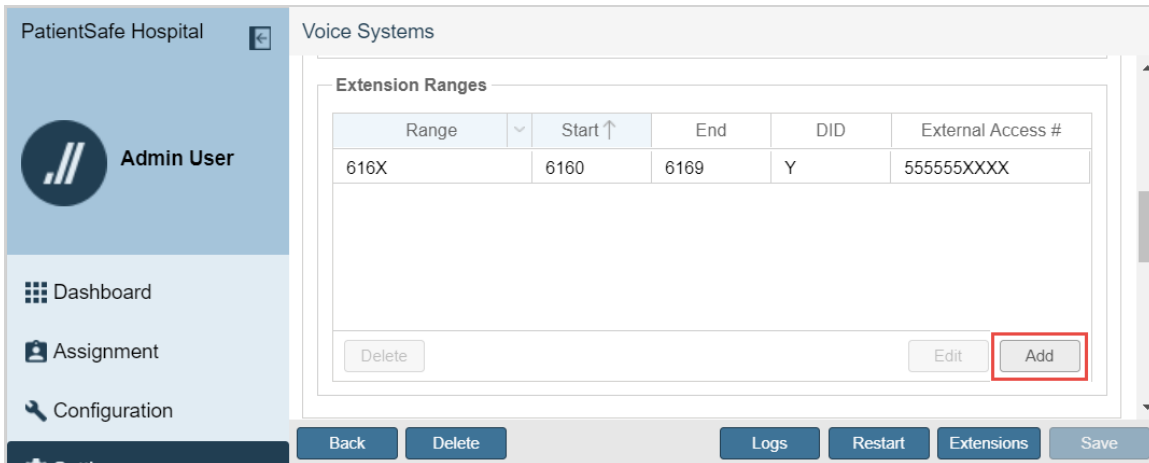
Enable Voicemail: Enable voicemail to be used on this server. When enabled, the two fields below will display.

Voicemail Dial #: Enter the extension that will be dialed to retrieve voicemails when a user clicks the voice mail icon.

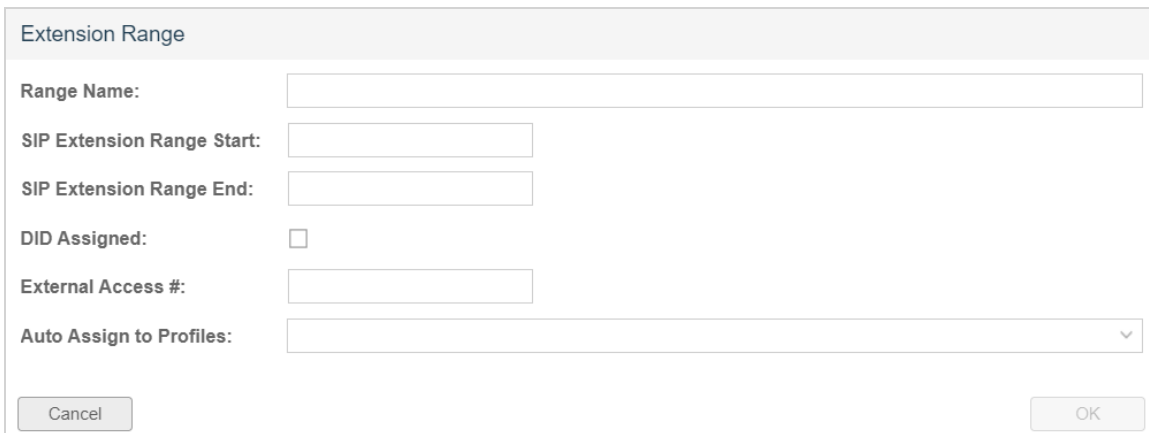
Voicemail Forward #: Enter the voicemail extension for which to forward calls.

System Administrators may want to add extension ranges.

1. Click **Add**.



2. The **Extension Range** dialog box displays.



3. 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.

4. Click **OK**.
5. Click **Add** under **Affiliated Facilities**.
6. Select a facility from the drop down menu. Complete the SRV Mapping field according to PatientSafe Solutions instructions.

Affiliated Facility

Facility:

SRV Mapping:

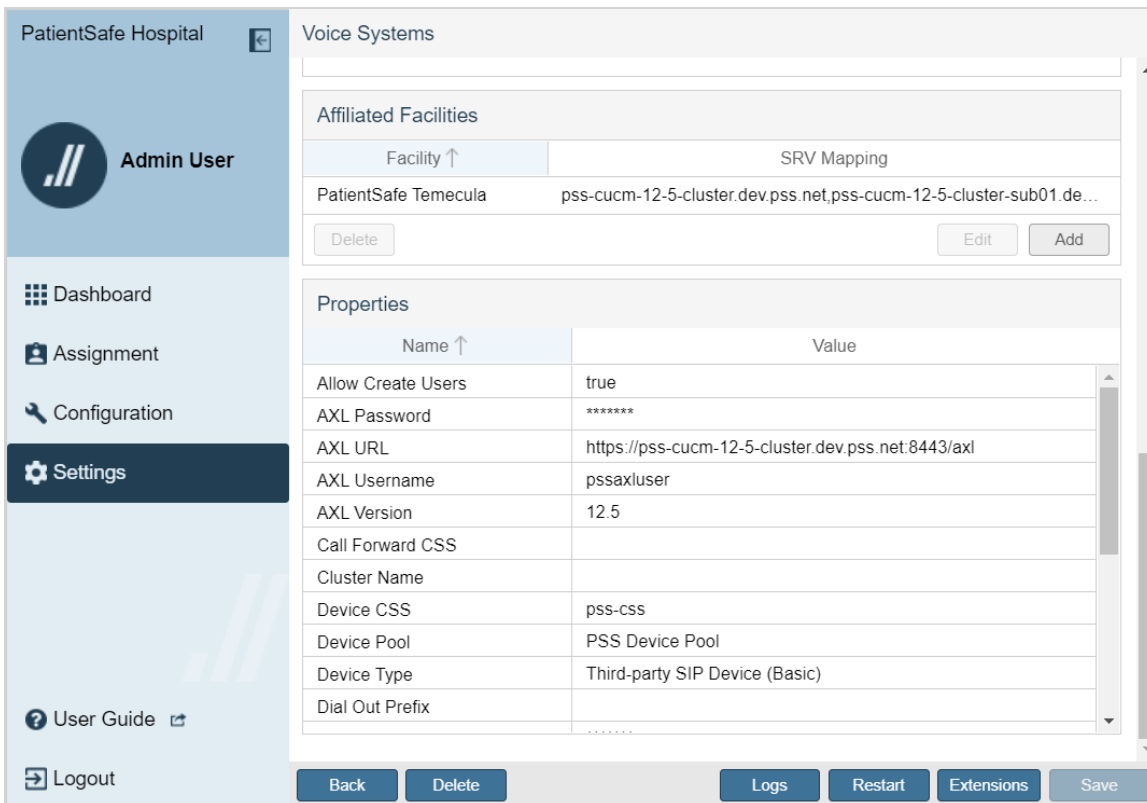
SRV Mapping is a list of patterns for matching _pssvoip SRV records with this Voice System and Facility.

- SRVs are comma separated
- Wildcards (*) are allowed
- Pattern ordering is ignored, PSS VOIP clients use the priority field of the SRV record to determine ordering

7. 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. |



Admin User

Settings

Voice Systems

Affiliated Facilities

Facility ↑	SRV Mapping
PatientSafe Temecula	pss-cucm-12-5-cluster.dev.pss.net,pss-cucm-12-5-cluster-sub01.de...

Properties

Name ↑	Value
Allow Create Users	true
AXL Password	*****
AXL URL	https://pss-cucm-12-5-cluster.dev.pss.net:8443/axl
AXL Username	pssaxuser
AXL Version	12.5
Call Forward CSS	
Cluster Name	
Device CSS	pss-css
Device Pool	PSS Device Pool
Device Type	Third-party SIP Device (Basic)
Dial Out Prefix

Buttons: Back, Delete, Logs, Restart, Extensions, Save

8. Click **Save**.
9. Click **Extensions** to view assigned extensions.

Note Click the **Extensions** topic on the left to learn more.

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

Extensions

Use the **Extensions** button on the Voice Systems screen to update the extensions on the voice server. The Extension functionality works similarly on CUCM and the PSS Voice Server.

Name	Login Name	PatientTouch Extension ↑	PBX Extension
pss test1			6201
pss test2			6203
pss test3			6204
pss test4			6205
Zohreh Doc			6206
Sophia Momeni			6207
Ava Momeni			6208
Purabi CUCM			6175
Purabi iOS			6199
Purabi AD			6186
DJ Turner			6176
Zohreh Hospitalist			6177
Molana Boo			6178
Ava Momeni			6179
Ed Huang			6180
Sophia Momeni			6181
Purabi Test			6185
Purabi Android			6188

1. Click **Select All** to select all extensions in the list. Or, select one or more individual extensions by pressing the Ctrl button on your keyboard.
2. Select:
 - **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.

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.

1. From the Dashboard, click **Settings>Notification Behavior**.

PatientSafe Hospital

Admin User

Dashboard

Hi Admin User!
Good morning
Friday, February 21, 2020

Dashboard

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System

- Security
- Device List

Communications

- App Link Partners
- App Link Launch Points
- Secure Messaging
- Quick Texts
- Voice Systems
- Notification Behavior

Clinical

<https://documentation-4x-test.qa.pss.net:8443/org-services-admin-web/#>

Text Messages

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

PatientSafe Hospital Admin User

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Notification Behavior

Text Messages

High Priority Messages

Vibration: Vibrate Long Vibrat

Sounds: Play Sound Double Chi

Popup: Display Popup

Medium Priority Messages

Vibration: Vibrate Short Vibra

Sounds: Play Sound Single Chin

Popup: Display Popup

Low Priority Messages

Vibration: Vibrate Short Vibra


Sounds: Play Sound Soft Ping


Popup: Display Popup

Save








Notification Messages

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

PatientSafe Hospital 



Admin User

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

Notification Behavior

Notification Messages

High Priority Notifications

Vibration: Vibrate Long Vibrat v

Sounds: Play Sound Single Chin v

Popup: Display Popup

Medium Priority Notifications

Vibration: Vibrate Short Vibra v

Sounds: Play Sound Soft Ping v

Popup: Display Popup

Low Priority Notifications

Vibration: Vibrate Short Vibra v

Sounds: Play Sound Soft Ping v

Popup: Display Popup

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

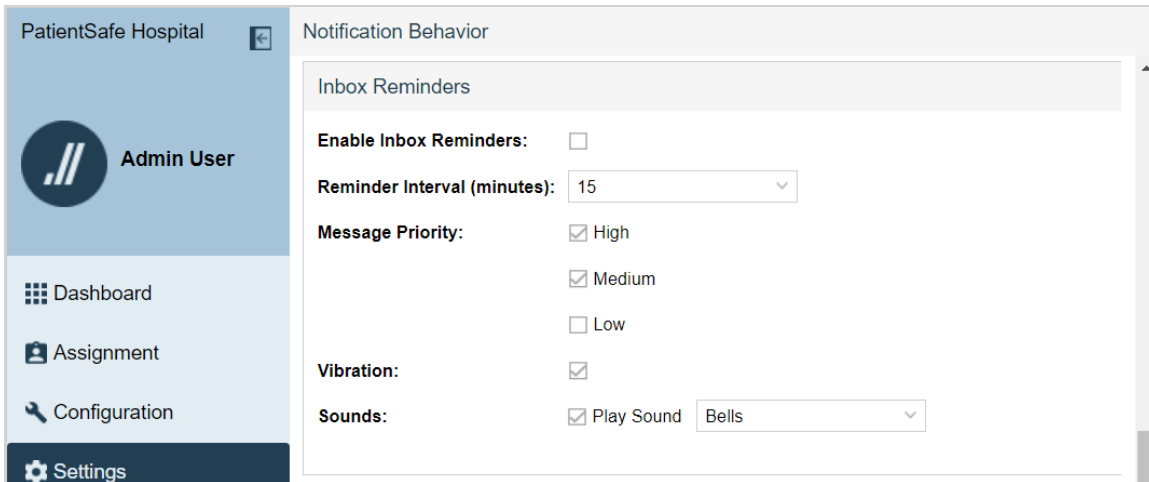
Save

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.

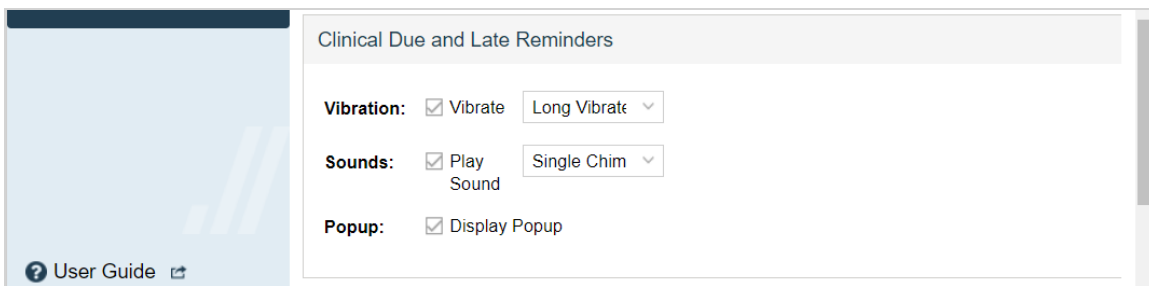
Reminder Interval Minutes: Enter the number of minutes after which users will receive an Inbox Reminder notification.

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



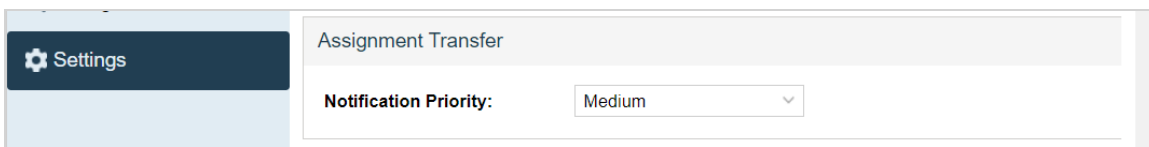
Clinical Due and Late Reminders

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



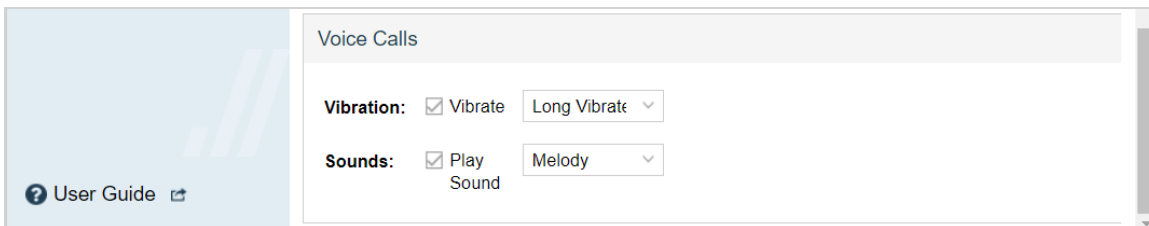
Assignment Transfer

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



Voice Calls

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

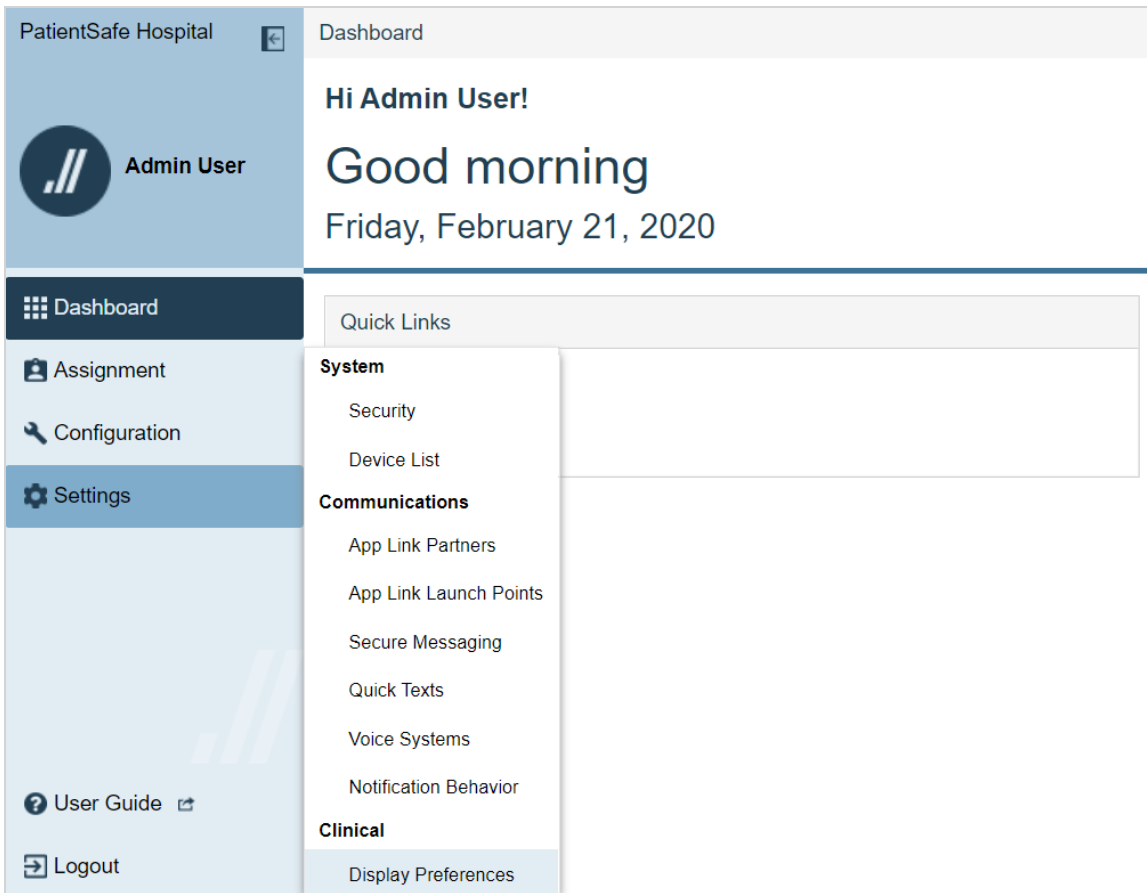


Clinical

Display Preferences

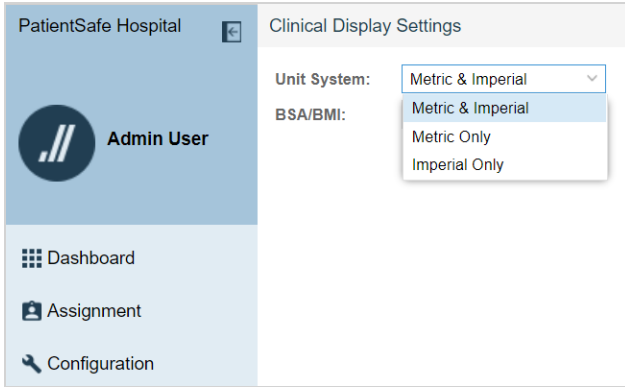
Hospitals can choose whether to display Body Surface Area (BSA) or Body Mass Index (BMI) on the patient info screen of the handheld, Web Messenger, MAR, Clinical Manager, and Enterprise Manager. In addition, facilities can choose to display a patient's height and weight in metric, imperial, or both units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

1. To configure these settings, click **Settings>Clinical> Display Preferences**.

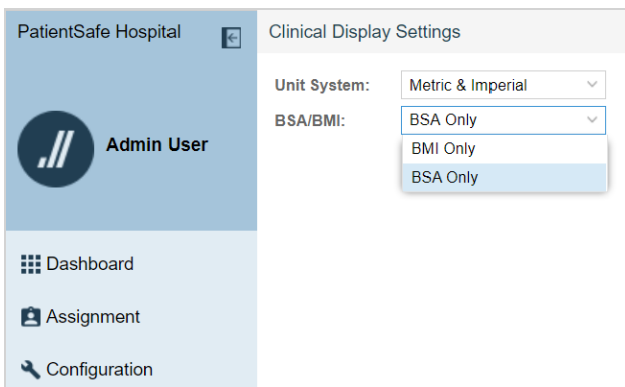


The screenshot shows the PatientSafe Hospital Admin User dashboard. The top navigation bar includes 'PatientSafe Hospital' and 'Dashboard'. The main content area displays a greeting: 'Hi Admin User!', 'Good morning', and 'Friday, February 21, 2020'. A sidebar menu on the left contains 'Dashboard', 'Assignment', 'Configuration', 'Settings', 'User Guide', and 'Logout'. The 'Settings' menu is expanded, showing a 'Quick Links' section, a 'System' section with 'Security' and 'Device List', a 'Communications' section with 'App Link Partners', 'App Link Launch Points', 'Secure Messaging', 'Quick Texts', 'Voice Systems', and 'Notification Behavior', and a 'Clinical' section with 'Display Preferences' highlighted.

2. Unit System: Select Metric & Imperial, Metric Only, or Imperial Only.



3. 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](#)

[Hunt Groups](#)

[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.

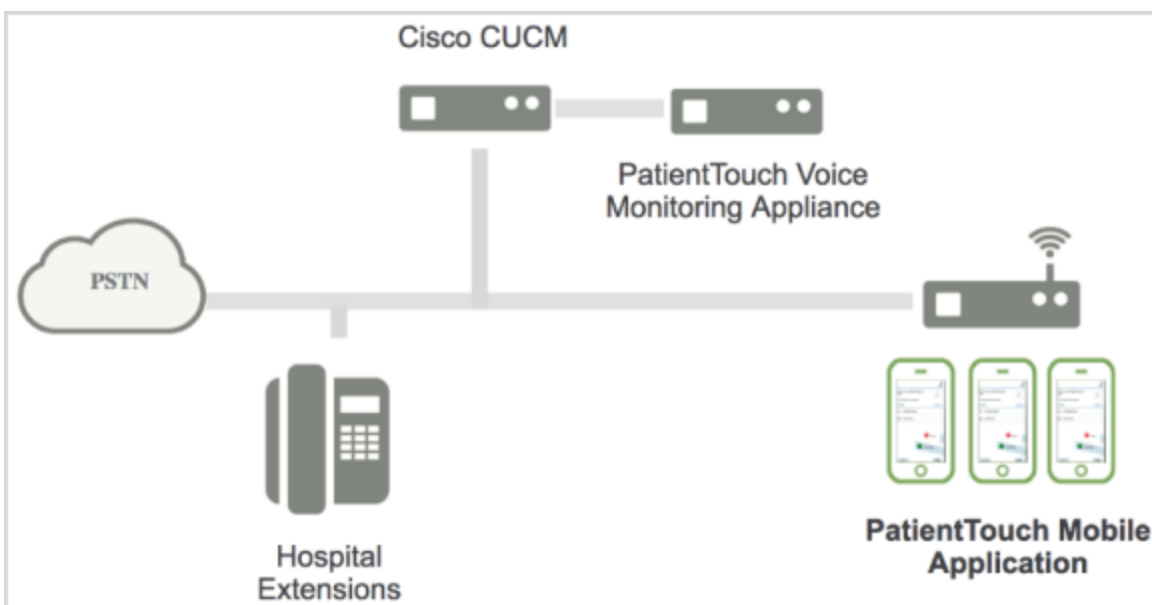
There are two ways that extensions can sync between PatientTouch and CUCM. This is dependent on whether or not the organization has enabled AD Sync.

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.

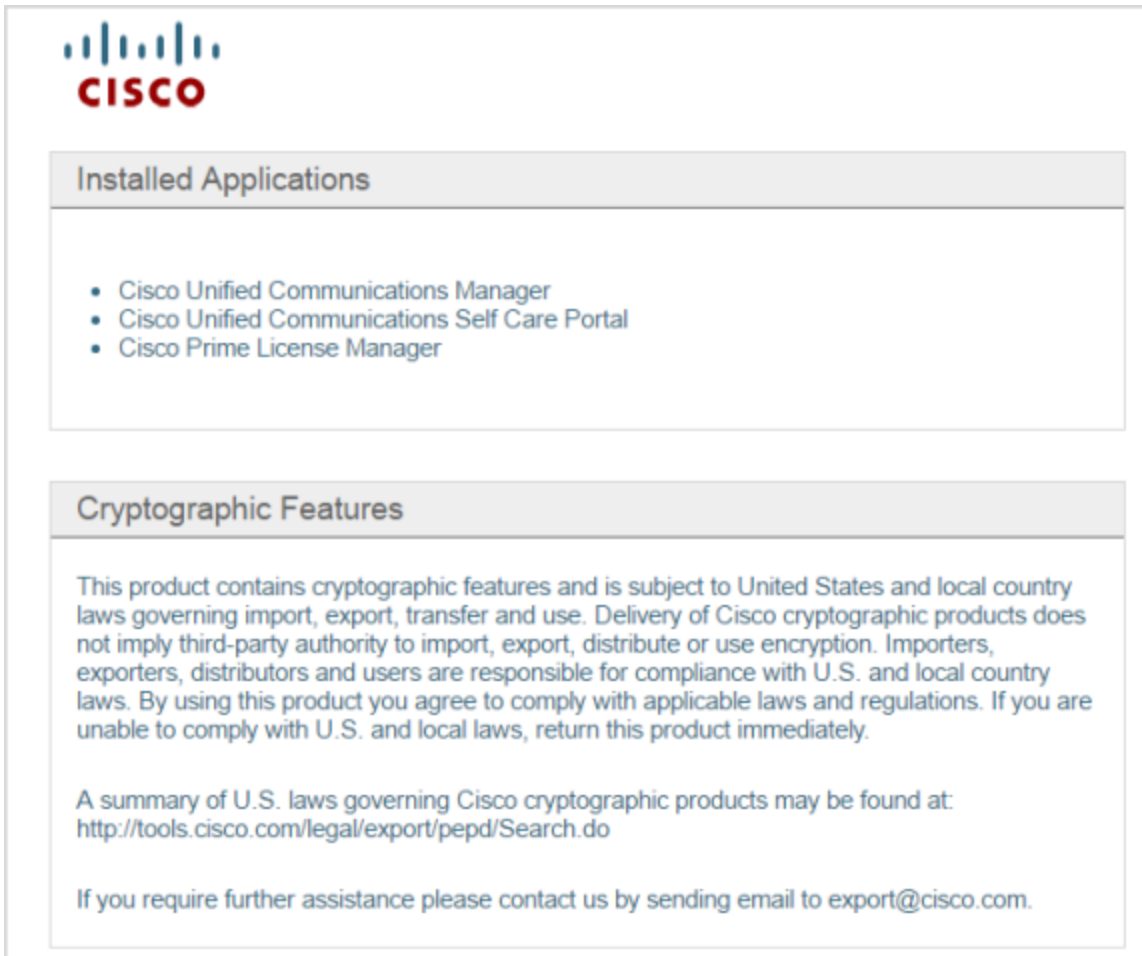
CUCM Setup

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 server ips (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 three 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.

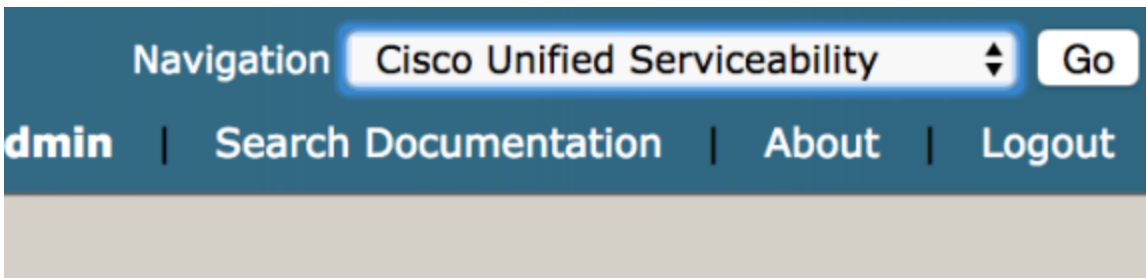
For Cisco Technical Support please visit our [Technical Support](#) web site.

Enable AXL on CUCM

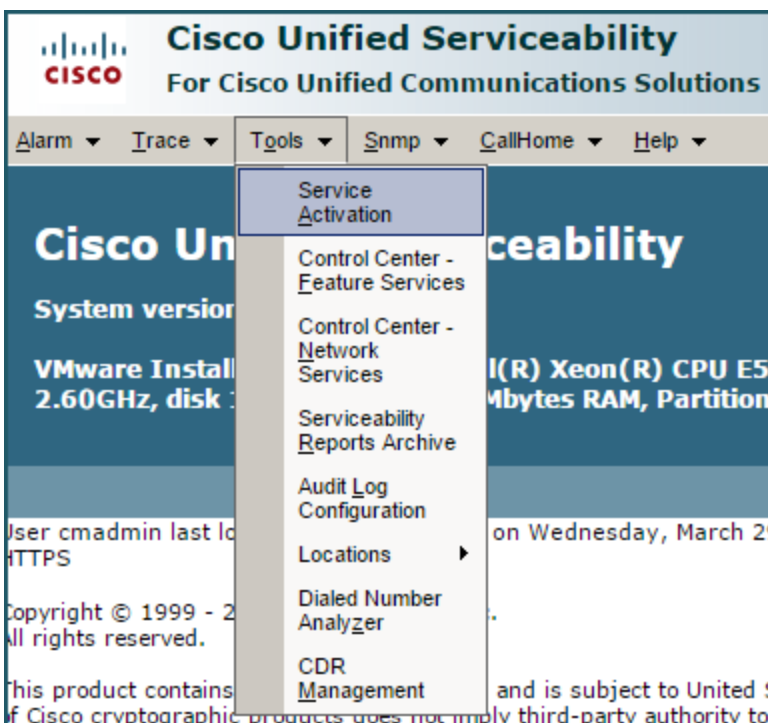
Org Services uses AXL to connect to CUCM and manage the per device SIP settings.

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**.

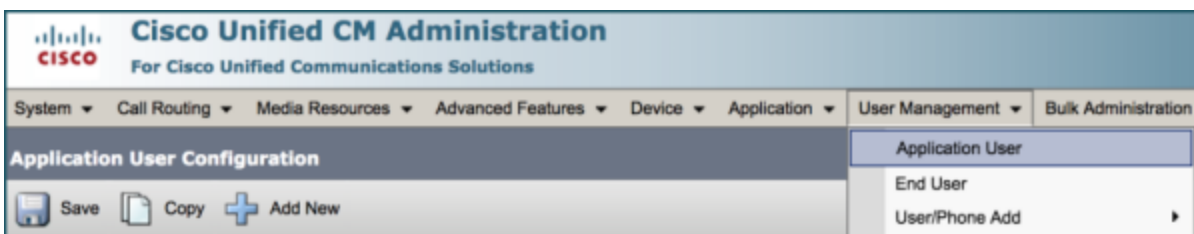
Database and Admin Services		
	Service Name	Activation Status
<input type="checkbox"/>	Cisco Bulk Provisioning Service	Deactivated
<input checked="" type="checkbox"/>	Cisco AXL Web Service	Activated
<input type="checkbox"/>	Cisco UXL Web Service	Deactivated
<input type="checkbox"/>	Cisco TAPS Service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

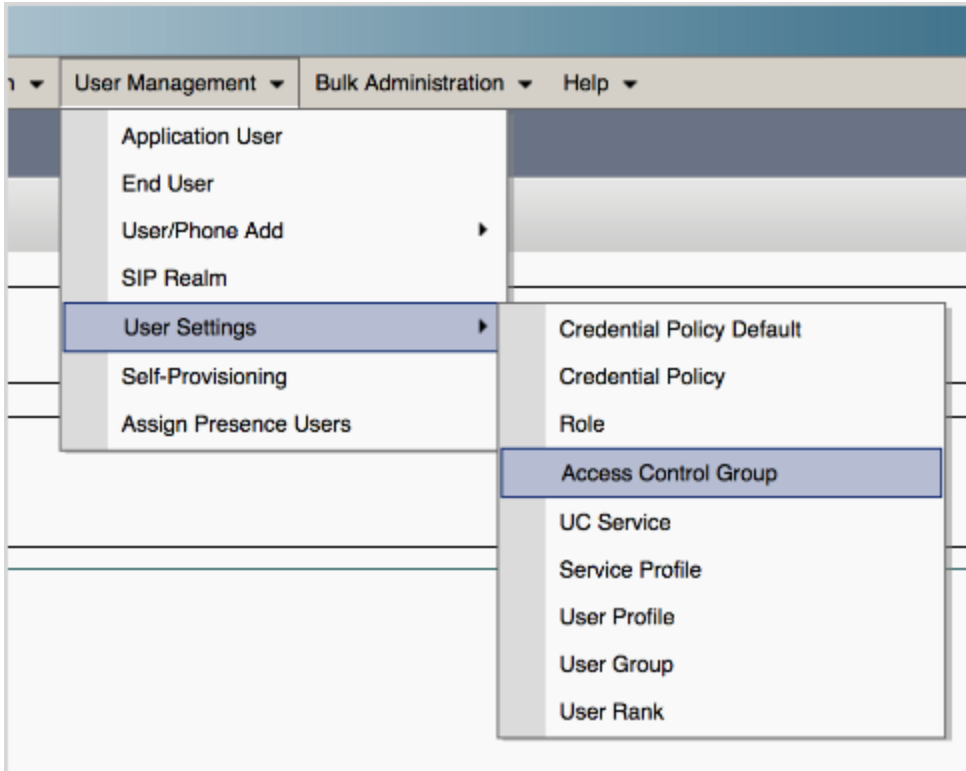
Make sure to click **Go**.

- Select User Management>Application User.

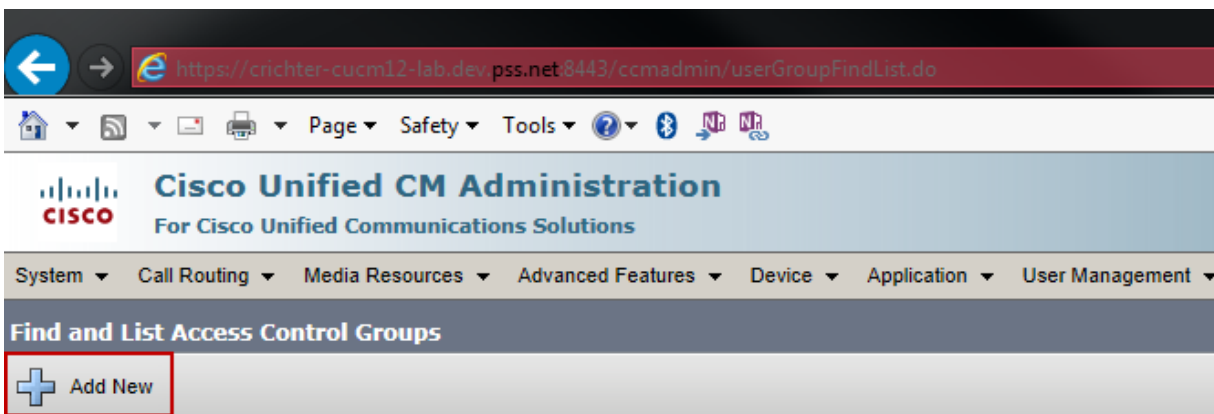


- Add the 'Standard AXL API Access' Role to the user. Roles are granted to CUCM Users by adding 'Access Control Groups'. See below for how to create a more restrictive Access Control Group.
- A more restrictive Access Control Group for PatientTouch can be created and added to the Application User. Create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

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



- Click **Add New**



- Enter the Access Control Group Name

- Click **Save**

The screenshot displays the Cisco Unified CM Administration web interface. At the top, the Cisco logo and the text "Cisco Unified CM Administration For Cisco Unified Communications Solutions" are visible. Below this is a navigation menu with items: System, Call Routing, Media Resources, Advanced Features, Device, and Application. The main heading is "Access Control Group Configuration".

Below the heading is a "Save" button with a floppy disk icon. The "Status" section shows "Status: Ready" with an information icon. The "Access Control Group Information" section contains two fields: "Name*" with the value "PatientTouch Groups 1" (highlighted with a red box) and "Available for Users with User Rank as*" with a dropdown menu showing "1 - Default User Rank".

At the bottom of the form is another "Save" button and an information icon with the text "*- 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 navigation menu includes "System", "Call Routing", "Media Resources", "Advanced Features", "Device", "Application", "User Management", and "Bulk Administration". A "Help" dropdown is also present.

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


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 of the section are "Save", "Delete", "Copy", and "Add New" buttons.


At the very bottom, there is an information icon and the text: "*. 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

- 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

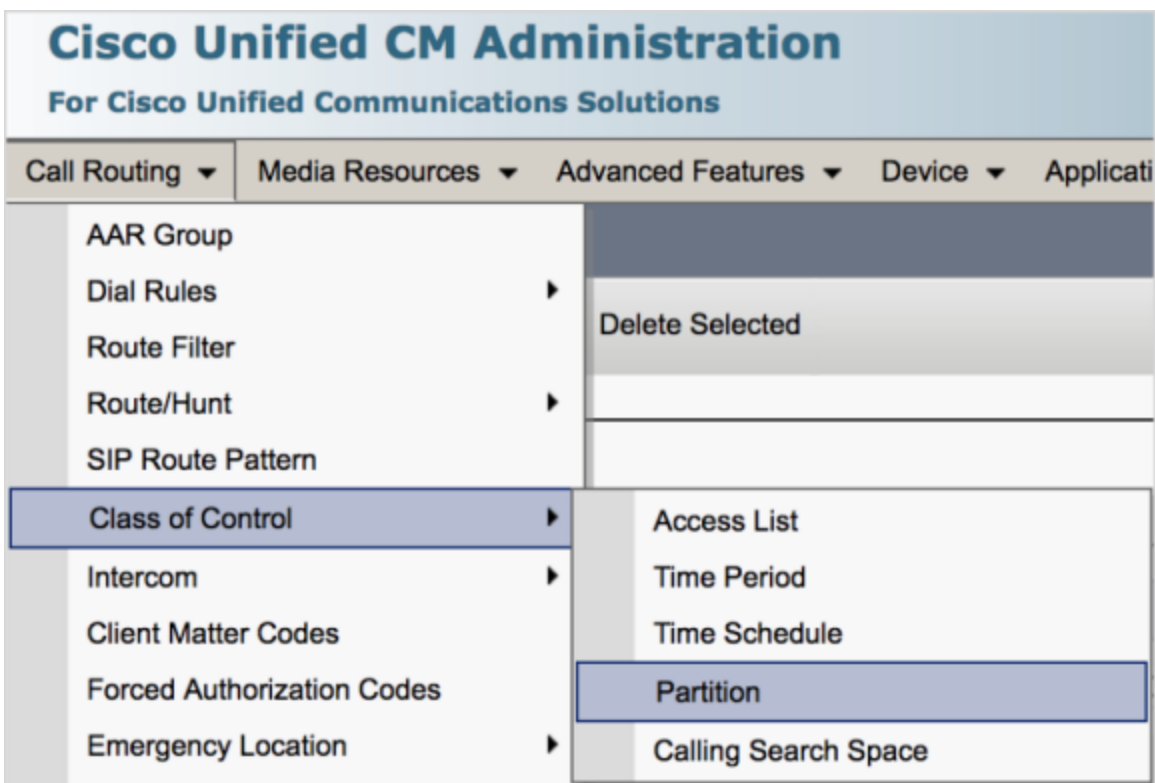
The following have to be configured on the CUCM server and the corresponding properties updated in Enterprise Manager > Voice Systems.

Route Partition & Calling Search Space

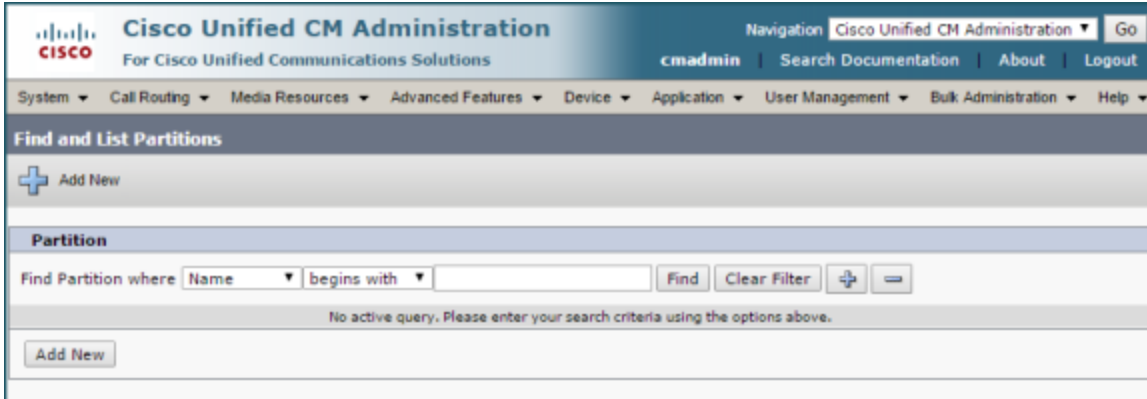
To enable custom call routing for PatientTouch devices, a new Route Partition and a new Calling Search Space specific to PSS devices are required. In addition to call routing, the Route Partition is also used to determine calls made by PatientTouch devices as part of the Call History feature.

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.

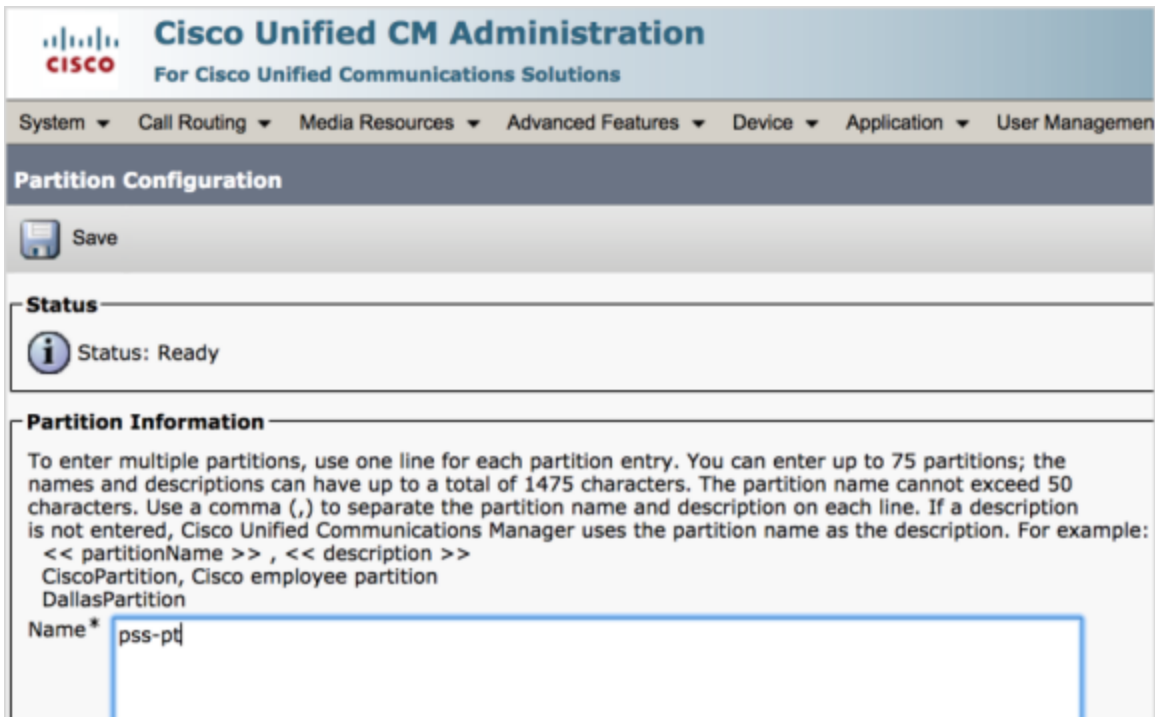


2. Click Add New.



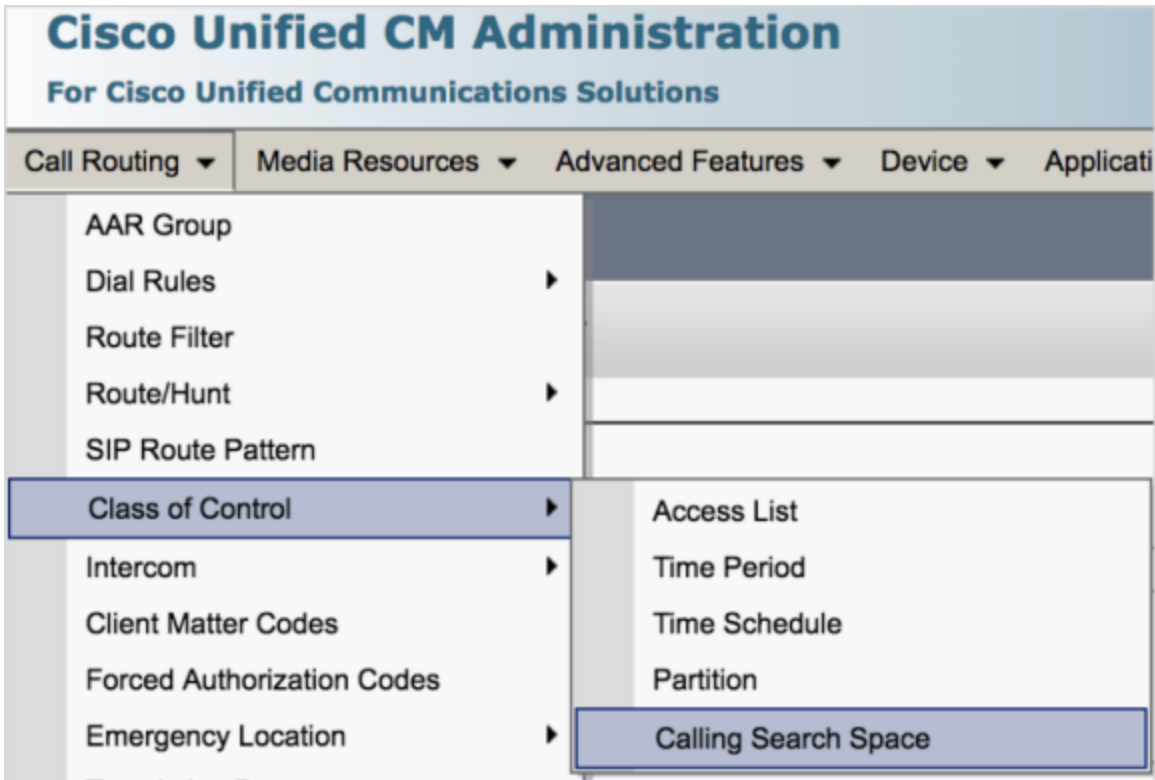
The screenshot shows the 'Find and List Partitions' page in Cisco Unified CM Administration. The page has a header with the Cisco logo and 'Cisco Unified CM Administration For Cisco Unified Communications Solutions'. A navigation bar includes 'Navigation', 'Cisco Unified CM Administration', and 'Go'. 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 with a dropdown menu set to 'Name', a 'begins with' dropdown, a text input field, and buttons for 'Find', 'Clear Filter', and a minus sign. 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**.

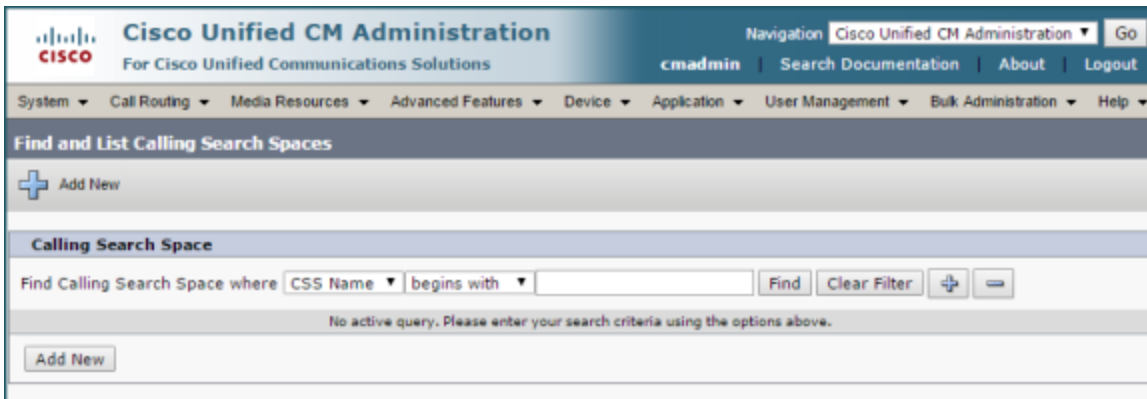


The screenshot shows the 'Partition Configuration' page in Cisco Unified CM Administration. The header is the same as the previous screenshot. The navigation bar includes 'System', 'Call Routing', 'Media Resources', 'Advanced Features', 'Device', 'Application', and 'User Management'. The main content area is titled 'Partition Configuration' and contains a 'Save' button with a floppy disk icon. Below this 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.

To allow multiple Voice Settings for the same CUCM cluster from a multi-facility installation of Org Services, each facility will have a single Voice Settings, that will have its own device pool and calling search space. A separate calling search space is necessary for each facility so 0, 911, etc, can be routed. Separate Device Pools are needed for to allow for different routing, and Caller ID transforms mask (among other settings that may be optionally used).

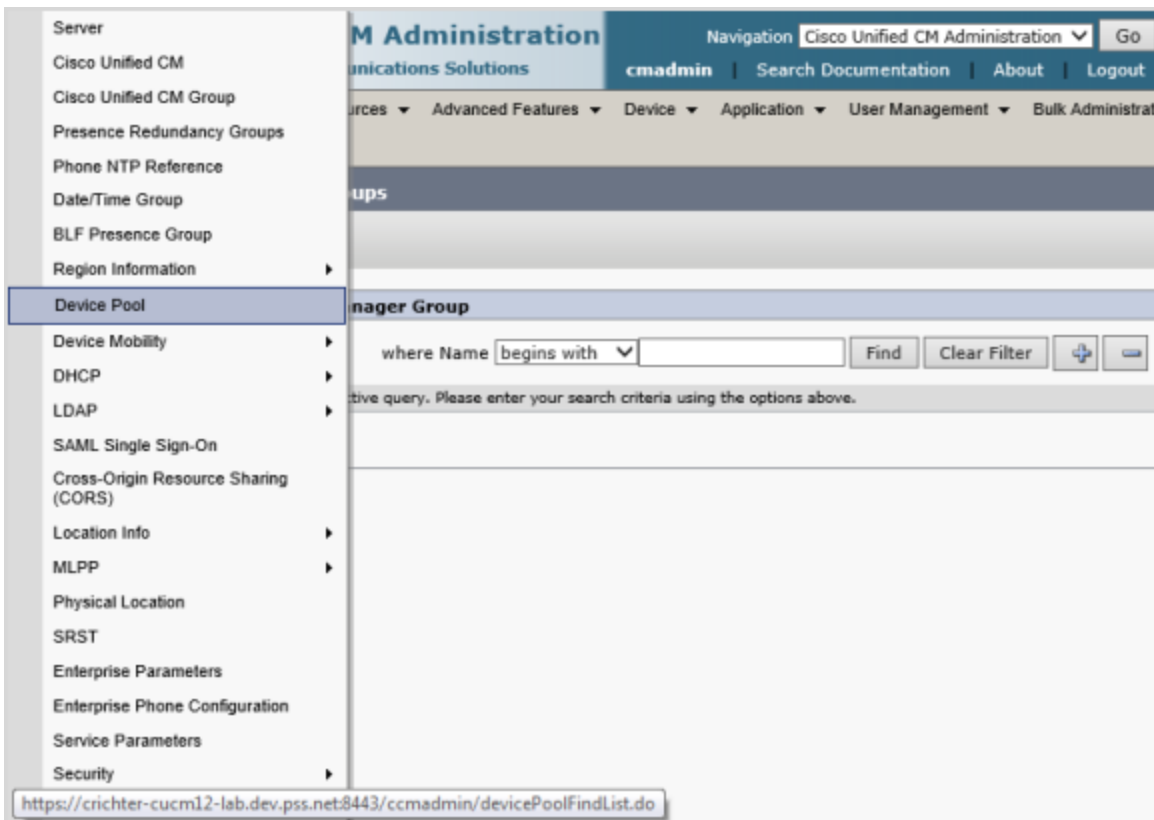
Device may be duplicated per facility OR move per facility in CUCM. This is determined by number of device pools listed per PBX.

- If single device pool entered, device will be duplicated across facilities.
- If multiple device pools, device will be moved between facilities.
- In both cases calling should work as expected.

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.

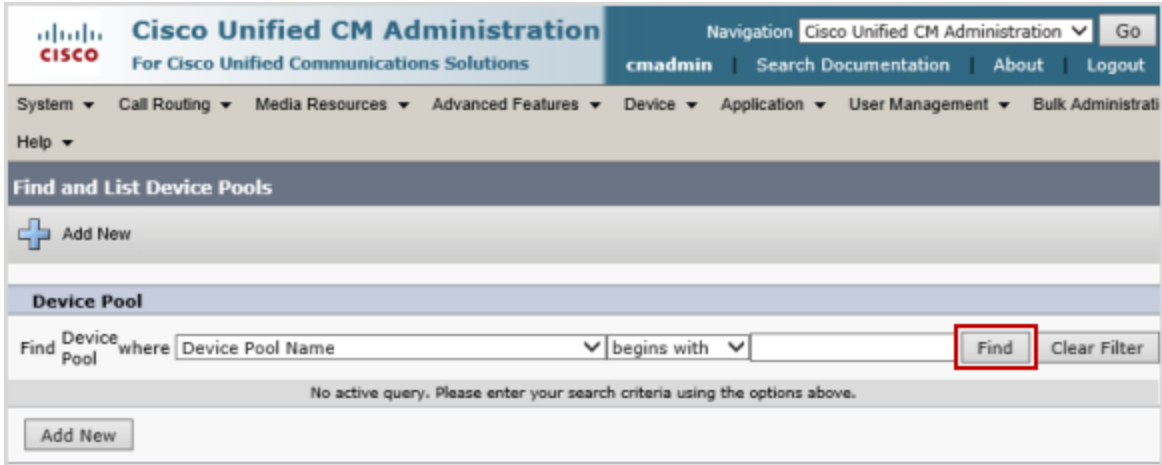
The device type must match 'Third-Party SIP Device (Basic)'.

1. From the System menu, select Device Pool.



The screenshot shows the Cisco Unified CM Administration web interface. On the left is a navigation tree with 'Device Pool' selected. The main content area shows the 'Device Pool' configuration page with a search filter set to 'where Name begins with'. The browser address bar at the bottom shows the URL: `https://crichter-cucm12-lab.dev.pss.net:8443/ccmadmin/devicePoolFindList.do`.

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 ▾

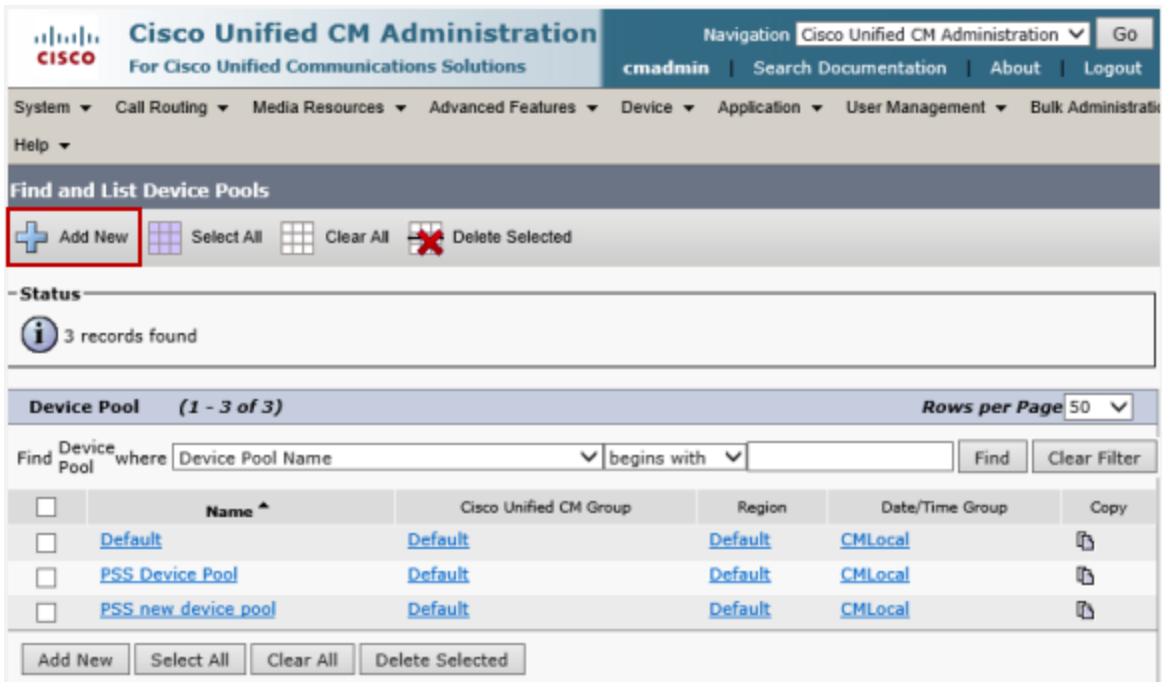
Find and List Device Pools

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

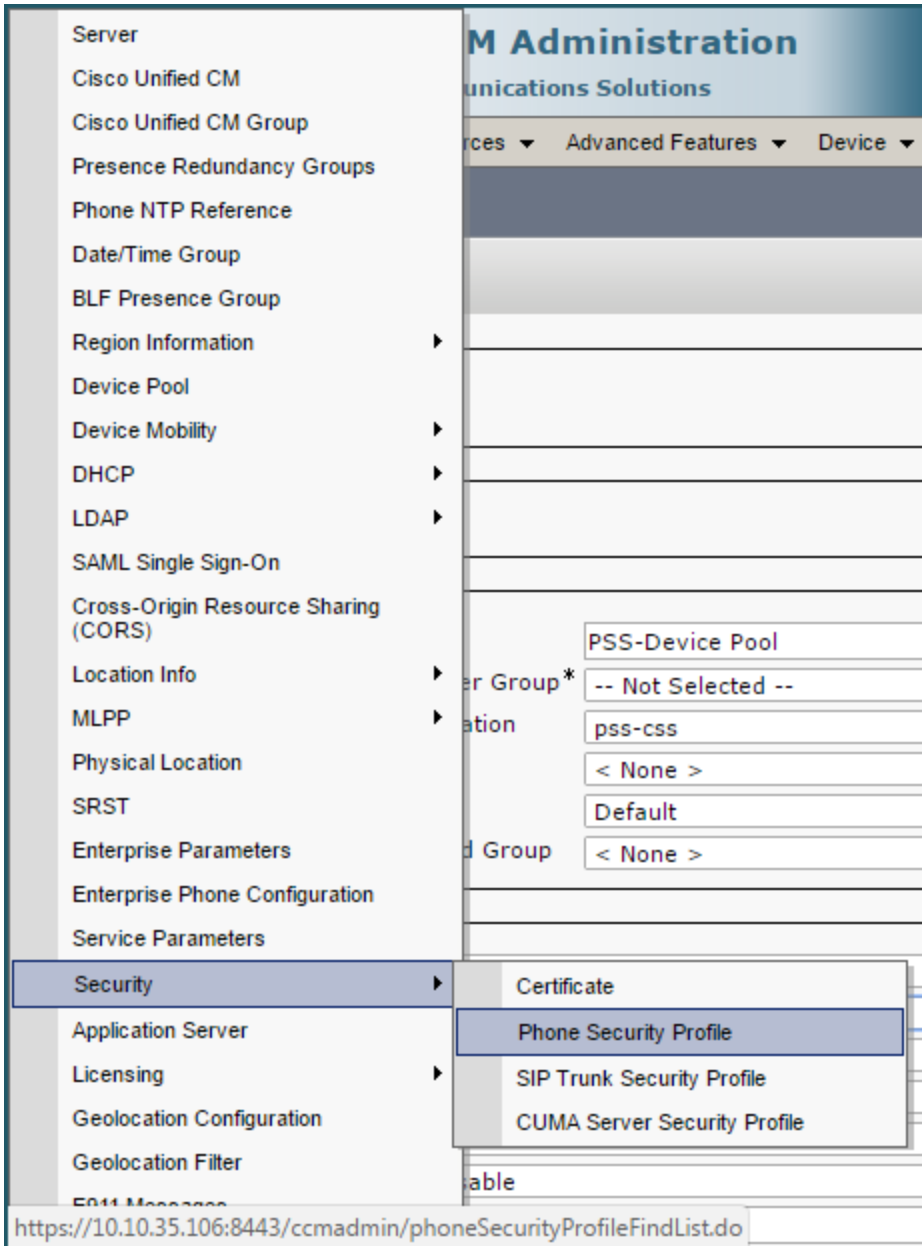
Device Pool Information	
Device Pool:	New
Device Pool Settings	
Device Pool Name*	<input type="text" value="PSS Device Pool"/>
Cisco Unified Communications Manager Group*	Default
Calling Search Space for Auto-registration	pss-css
Adjunct CSS	< None >
Reverted Call Focus Priority	Default
Intercompany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

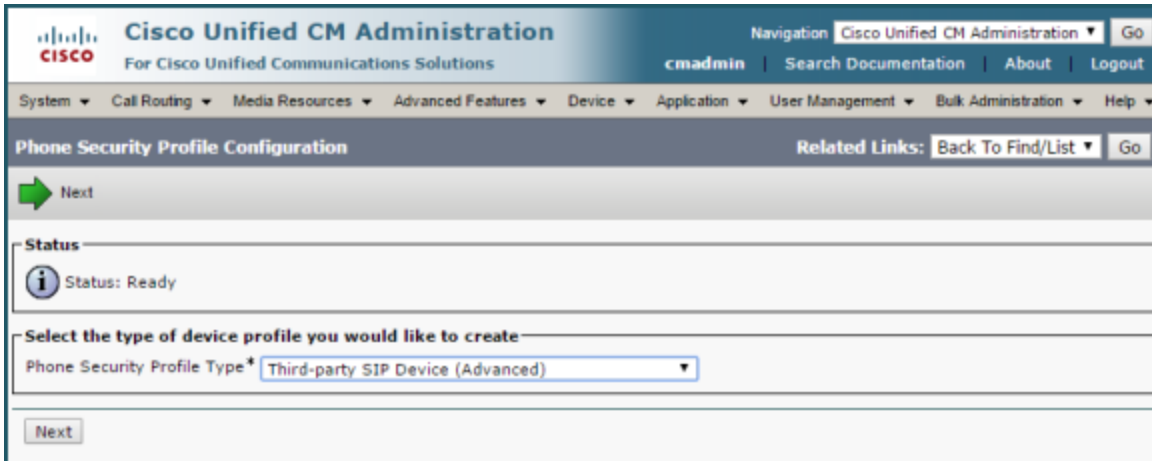
This is only needed if you want to enable digest authentication. Add a new SIP Security Profile and select 'Digest Authentication'. Take note of the name you used for this SIP Security Profile, this will be configured in Enterprise Manager later.

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 navigation bar includes the Cisco logo, the title "Cisco Unified CM Administration", and the subtitle "For Cisco Unified Communications Solutions". The user is logged in as "cadmin". A navigation menu contains items like 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 includes 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.

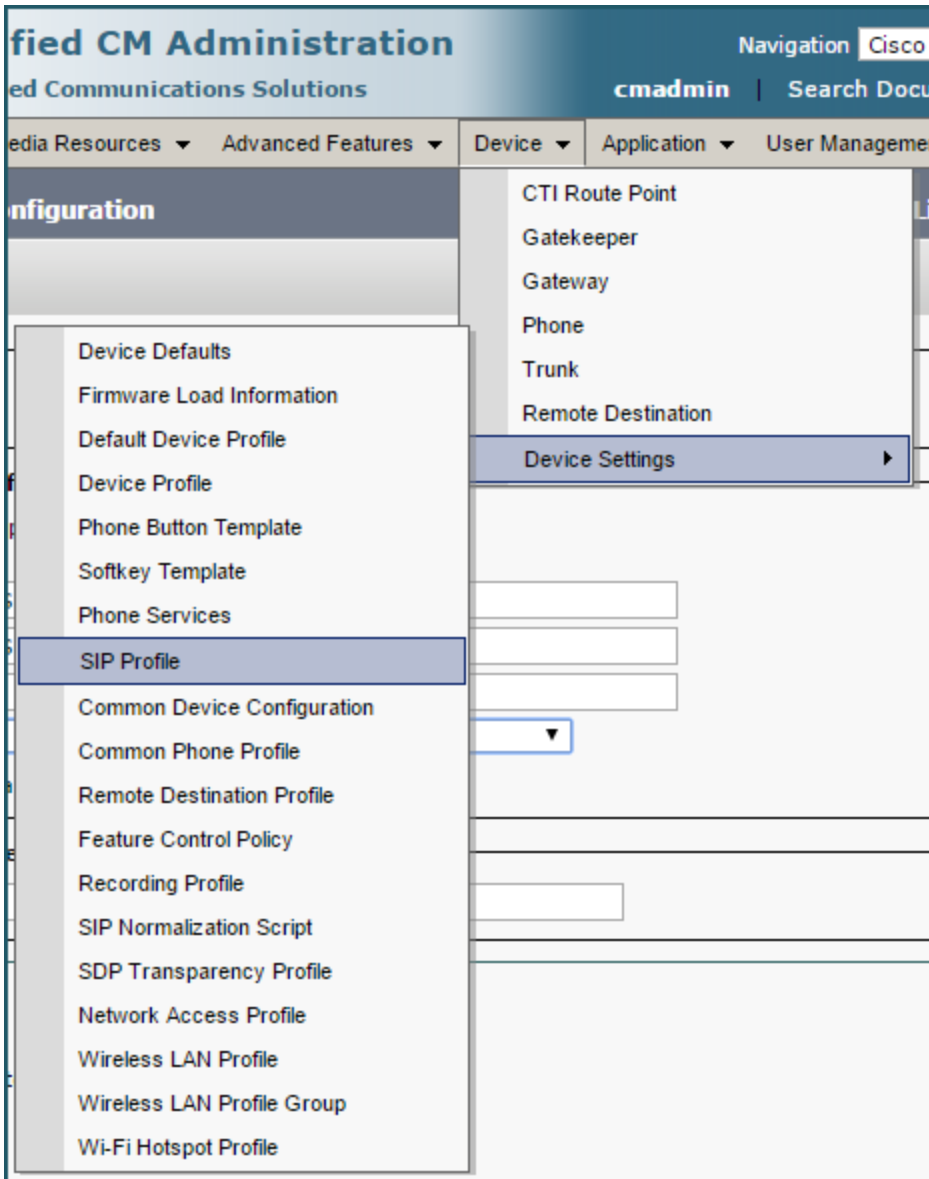
Call History has to be enabled on the CUCM server. Call history logs are uploaded by CUCM to the Org Services cluster over SFTP. Only logs for the route partition configured in 'Voice Systems' are considered.

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)

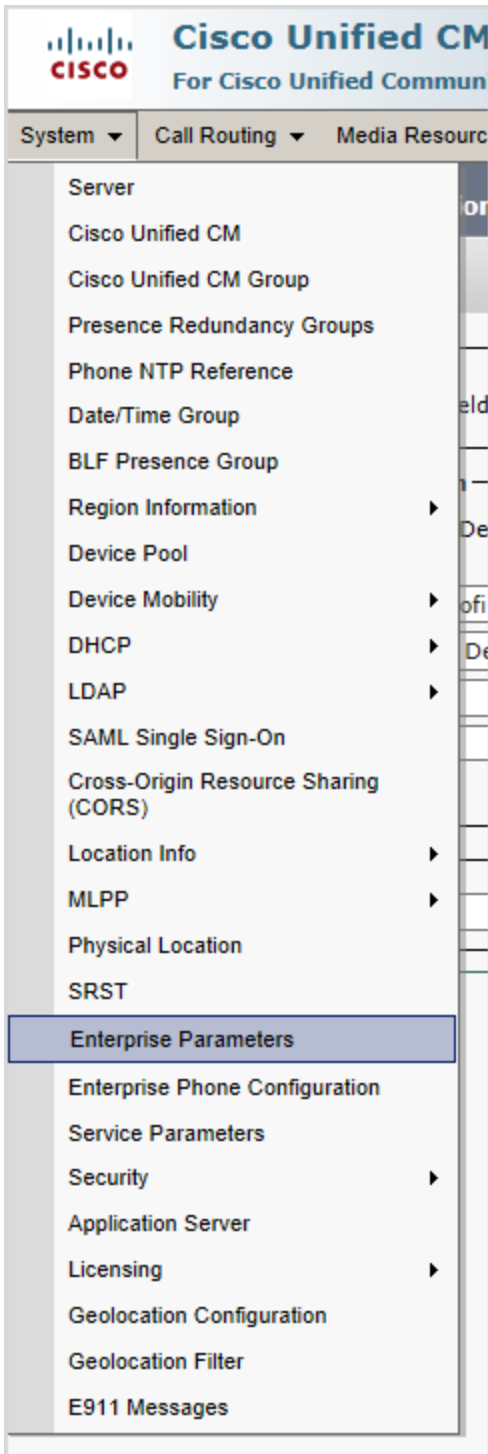
SIP Domain

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](#) *

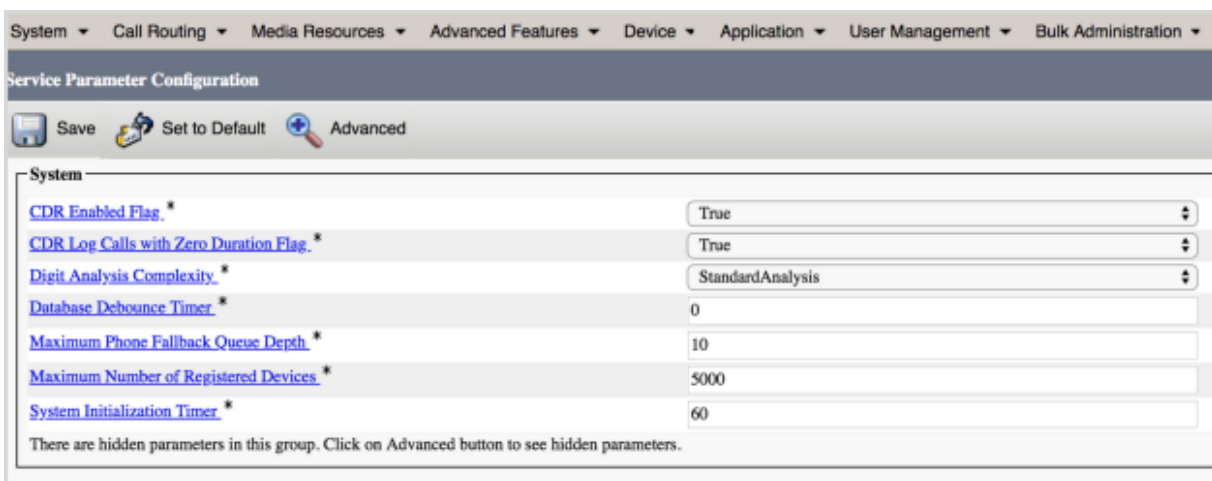
TLS Resumption Timer

[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.

1. Set the 'CDR File Time Interval' to '1' under 'System' -> 'Enterprise Parameters' (the call history records will uploaded to Org Services every 1 minute).
2. 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 ▾ Call Routing ▾ Media Resources ▾ Advanced Features ▾ Device ▾ Application ▾ User Management ▾ Bulk Administration ▾

Service Parameter Configuration

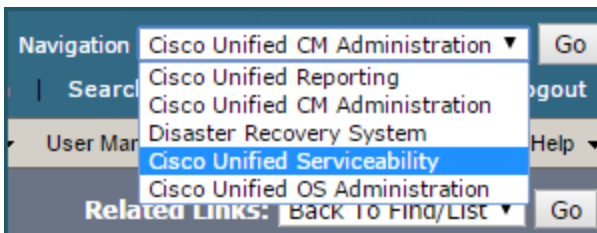
Save Set to Default Advanced

System

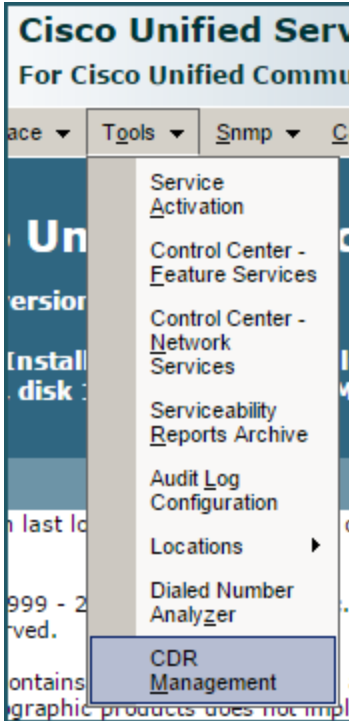
CDR Enabled Flag *	True
CDR Log Calls with Zero Duration Flag *	True
Digit Analysis Complexity *	StandardAnalysis
Database Debounce Timer *	0
Maximum Phone Fallback Queue Depth *	10
Maximum Number of Registered Devices *	5000
System Initialization Timer *	60

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

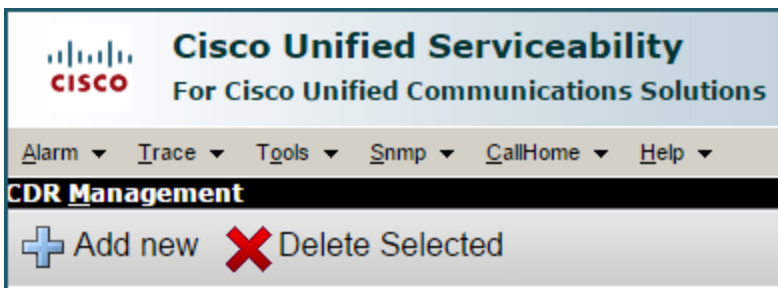
3. Then setup 'CDR Management': Select 'Cisco Unified Serviceability' and click 'Go'.



4. Click Tools>CDR Management.




5. 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).

6. 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

Hunt Groups

A hunt group is a method of distributing phone calls from a single extension or number to a group of users. In order to use Hunt Groups with PatientTouch they must first be configured in CUCM.

Terminology:

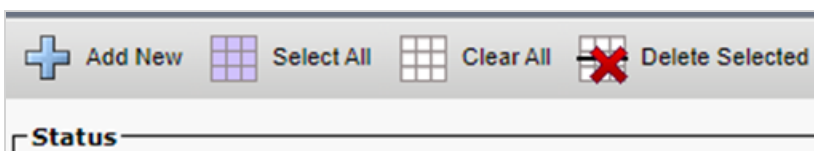
- **Line Group** - A line group allows you to designate the order in which directory numbers are chosen. PatientTouch Extensions are added and removed from this line group. In general, we anticipate sites configuring the Distribution Algorithm(Ring Order) to Broadcast, which will ring all numbers.
- **Hunt List** - A Hunt List lists a set of Line groups in a specific order.
- **Hunt Pilot** - A Hunt Pilot is the extension that routes calls to the Hunt List.

Create a new Line Group. PatientTouch extensions will be added/removed from this line group.

1. Click **Route/Hunt > Line Group**.



2. Click **Add New**.



3. Enter the following information:

- Line Group Name. Note this as it will need to be entered into Enterprise Manager.
- Ring No Answer (RNA) Timer. The recommended length is 15 seconds.
- Distribution Algorithm. The recommended option is Broadcast.
- Optionally, set responses for No Answer and Busy settings.

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

Line Group Configuration

Save Delete Add New

Line Group Information

Line Group Name*

RNA Reversion Timeout*

Distribution Algorithm*

Hunt Options

No Answer*

Automatically Logout Hunt Member on No Answer

Busy**

Not Available**

Optionally, a second line group may be set up as a fallback.

Line Group Configuration Related Links: [Back To](#)

Save Delete Add New

Line Group Information

Line Group Name*

RNA Reversion Timeout*

Distribution Algorithm*

Hunt Options

No Answer*

Automatically Logout Hunt Member on No Answer

Busy**

Not Available**

Line Group Member Information

Find Directory Numbers to Add to Line Group

Partition

Directory Number Contains

Available DN/Route Partition

- 6101/ps-pt
- 8888#1/ps-pt
- 8888252*1#/ps-pt
- 9101/ps-mwtest1-pt
- Too many matches; use more specific search.

Current Line Group Members

Selected DN/Route Partition

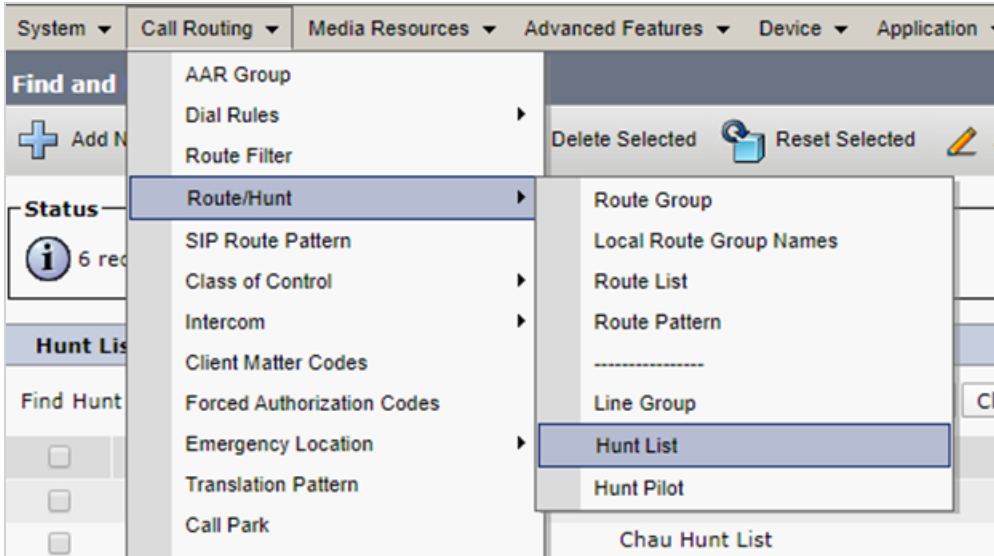
Removed DN/Route Partition

Directory Numbers

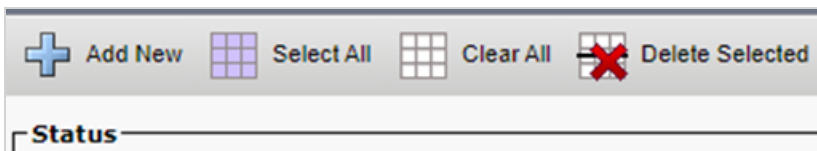
[View 1006 in ps-white-pt](#)

Create a Hunt List.

1. Click on **Route/Hunt > Hunt List**.



2. Click **Add New**.



3. Enter the following information:

- Name
- Description
- Check the box next to “Enable Hunt List”.
- Click “Add Line Group” and add the line group created in the first step.

Hunt List Configuration Related

Save ✖ Delete 📄 Copy 🔄 Reset 🔧 Apply Config ➕ Add New

- Status -

📘 Status: Ready

- Hunt List Information -

Device is trusted

Name*

Description

Cisco Unified Communications Manager Group*

Enable this Hunt List (change effective on Save; no reset required)

For Voice Mail Usage

- Hunt List Member Information -

➕ Add Line Group

Selected Groups**

Removed Groups***

- Hunt List Details -

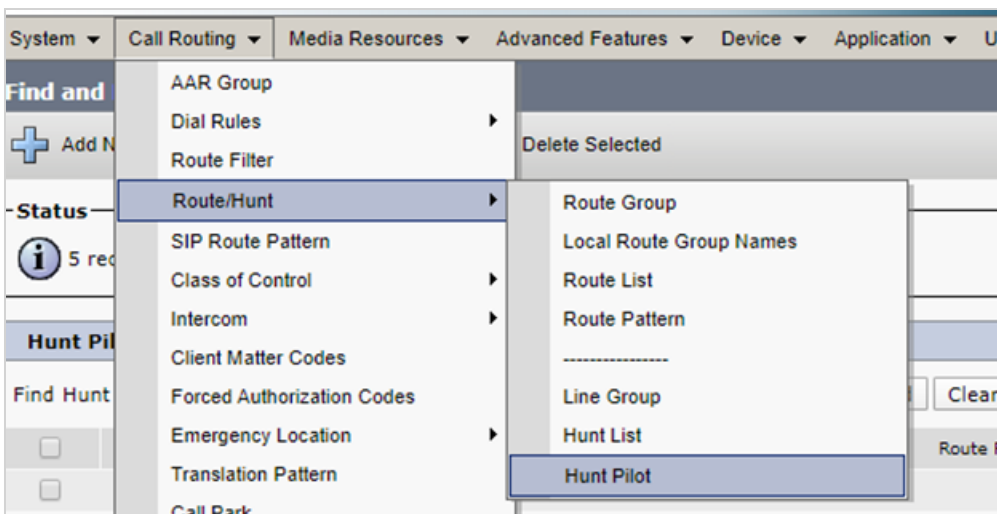
📄 [Line Group PSS 1](#)

📄 [7001 Fall Back Number](#)

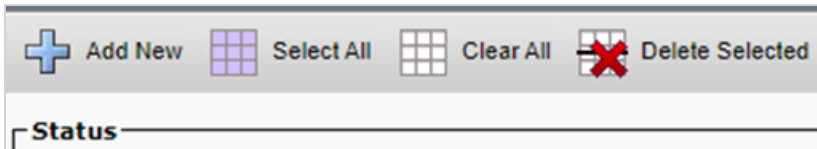
Save Delete Copy Reset Apply Config Add New

Create Hunt pilot.

1. Click on **Route/Hunt > Hunt Pilot**.



2. Click **Add New**.



3. Enter the following information:
 - Hunt Pilot DN
 - Select the Route Partition
 - Description
 - Select the Hunt List created in the second step.
 - Alerting name
 - Optionally, set forward no answer and busy settings.

Hunt Pilot Configuration		Related Link
Save Delete Copy Add New		
Status		
Status: Ready		
Pattern Definition		
Hunt Pilot*	<input type="text" value="7001"/>	
Route Partition	<input type="text" value="pss-white-pt"/>	
Description	<input type="text" value="Hunt Group PSS 1"/>	
Numbering Plan	<input type="text" value="< None >"/>	
Route Filter	<input type="text" value="< None >"/>	
MLPP Precedence*	<input type="text" value="Default"/>	
Hunt List*	<input type="text" value="Hunt List PSS 1"/>	(Edit)
Call Pickup Group	<input type="text" value="< None >"/>	
Alerting Name	<input type="text" value="Hunt Group PSS 1"/>	
ASCII Alerting Name	<input type="text" value="Hunt Group PSS 1"/>	
Route Option	<input checked="" type="radio"/> Route this pattern <input type="radio"/> Block this pattern <input type="text" value="No Error"/>	
<input type="checkbox"/> Provide Outside Dial Tone <input type="checkbox"/> Urgent Priority		
Hunt Call Treatment Settings		
Forward Hunt No Answer		
<input checked="" type="radio"/> Do Not Forward Unanswered Calls <input type="radio"/> Use Forward Settings of Line Group Member <input type="radio"/> Forward Unanswered Calls to		
Destination	<input type="text"/>	
Calling Search Space	<input type="text" value="< None >"/>	
Maximum Hunt Timer	<input type="text"/>	
Forward Hunt Busy		
<input checked="" type="radio"/> Do Not Forward Busy Calls <input type="radio"/> Use Forward Settings of Line Group Member <input type="radio"/> Forward Busy Calls to		
Destination	<input type="text"/>	
Calling Search Space	<input type="text" value="< None >"/>	

When setting up the Hunt Group in Enterprise Manager, enter the Line Group Name from CUCM. Please see step by step instructions in the Enterprise Manager User Guide.

Voice

Facility:	PatientSafe Temecula	Name:	3RDFLOOR: Consulting Endocrinologist
Voice System:	pss-cucm-12-5-cluster	Extension (Display Only):	6010
		Fallback # (Display Only):	6000
		Hunt Group:	<input checked="" type="checkbox"/>
		External Number:	
		Line Group Name:	<input type="text"/> ⓘ

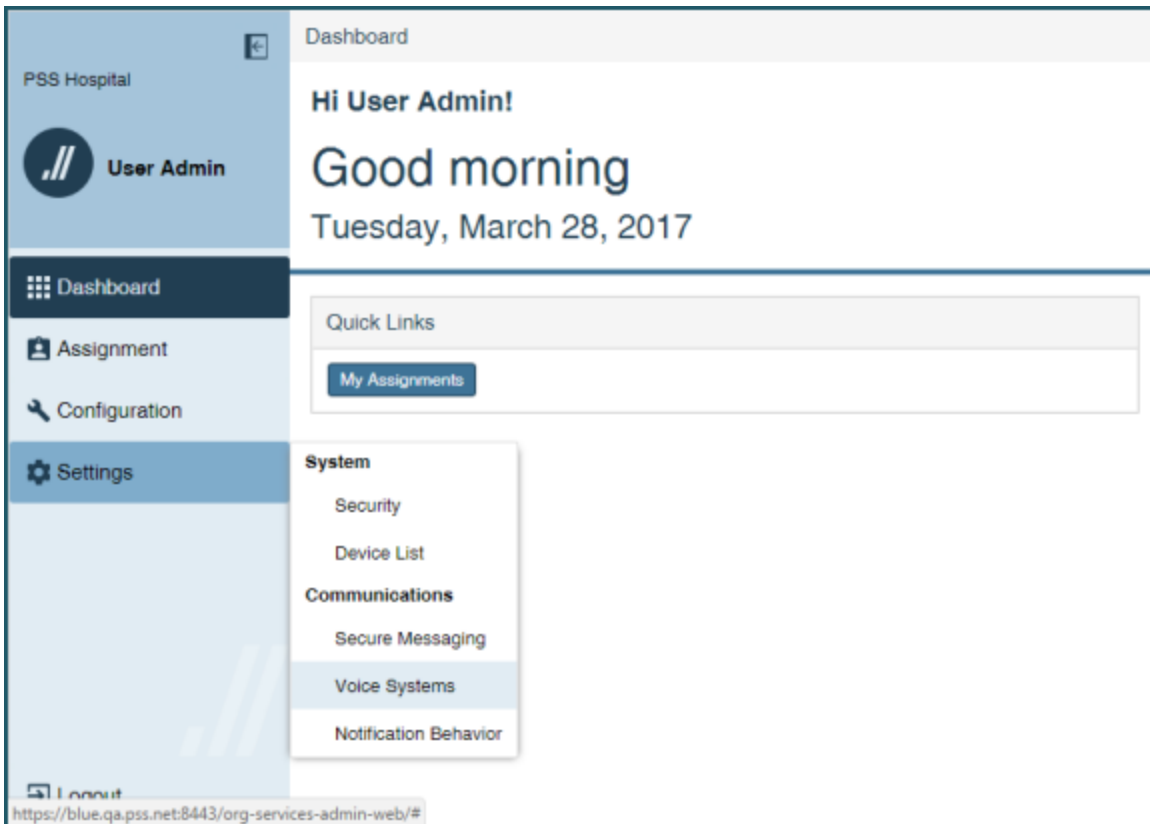
Cancel Done

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.

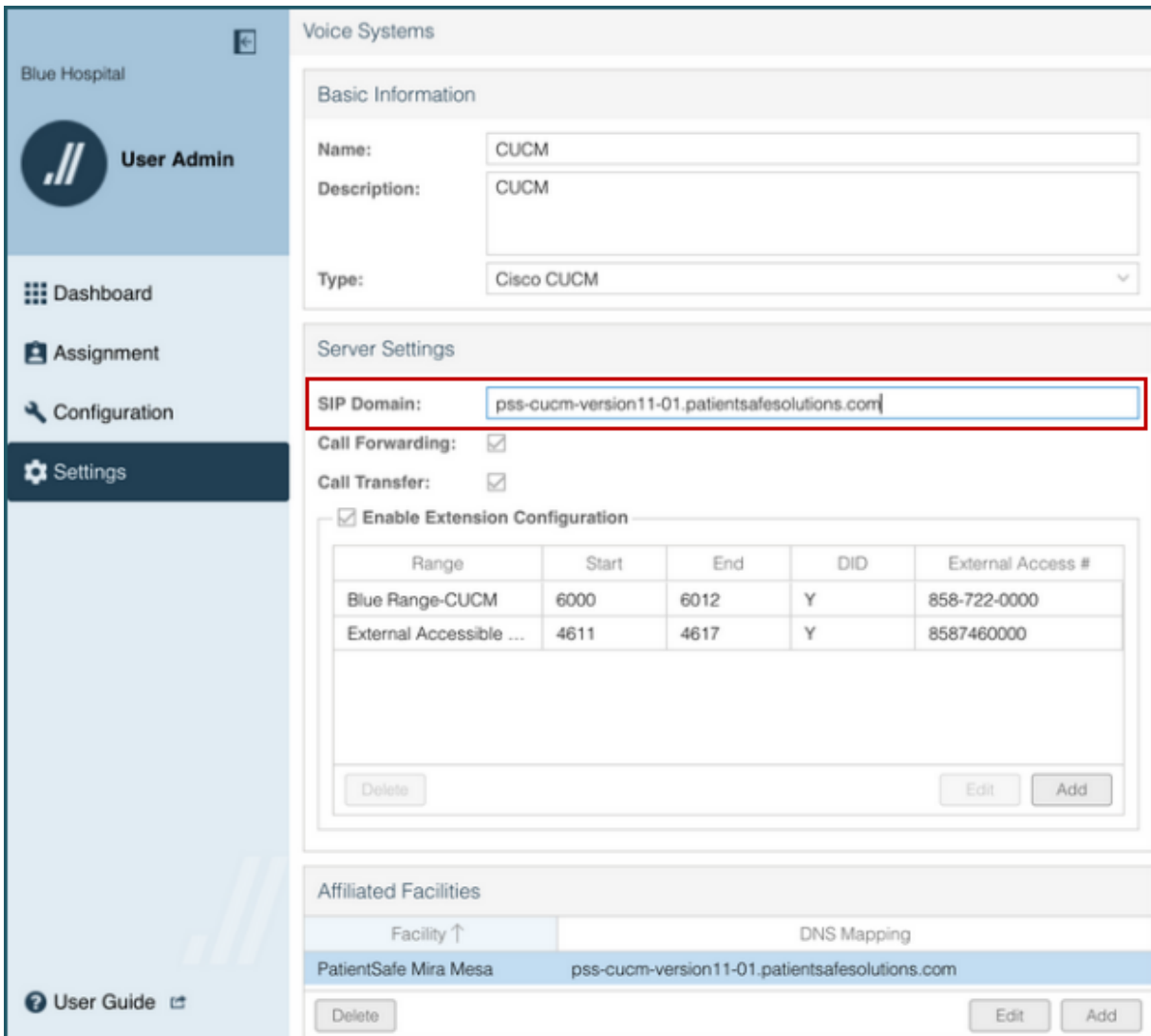
1. Select Settings>Voice Systems.



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 contains navigation options: Blue Hospital, User Admin, Dashboard, Assignment, Configuration, and Settings. The main content area is divided into sections: Basic Information, Server Settings, and Affiliated Facilities.

Basic Information

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

Server Settings

- SIP Domain: `pss-cucm-version11-01.patientsafesolutions.com` (highlighted with a red box)
- 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

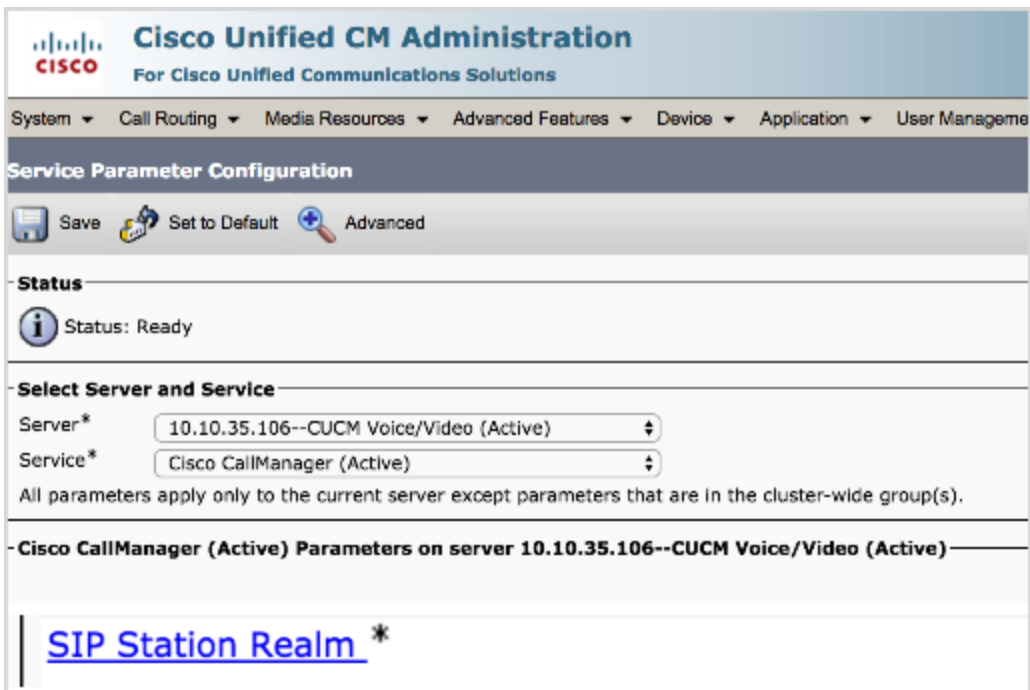
Affiliated Facilities

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 expanded to show the "SIP Station Realm" parameter, which is marked 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.

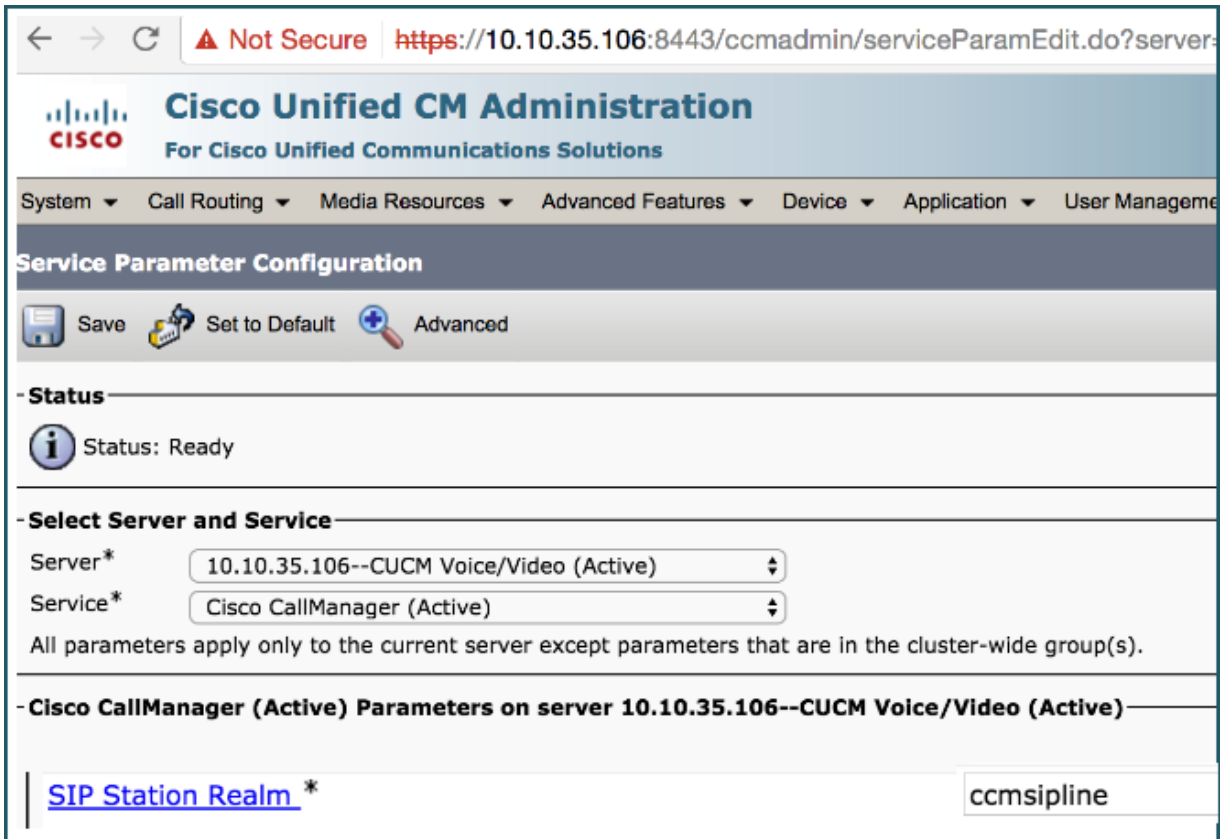
- Make sure the 'Digest Realm' matches the setting 'SIP Station Realm' in CUCM - See the 'Authentication' section below.
- Make sure the 'CUPI' settings are blank (they are by default) - these are only used in test environments.

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 section is 'Service Parameter Configuration', which includes buttons for Save, Set to Default, and Advanced. Below this, the 'Status' section shows 'Status: Ready'. The 'Select Server and Service' section has two dropdown menus: 'Server*' set to '10.10.35.106--CUCM Voice/Video (Active)' and 'Service*' set to '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
14Mbytes RAM, Partitions

...ter on Wednesday, March 29,
Inc.

...res and is subject to United Sta
...mply third-party authority to in
...with U.S. and local country laws
...with U.S. and local laws, return t

...ryptographic products may be

...unications Manager please visit

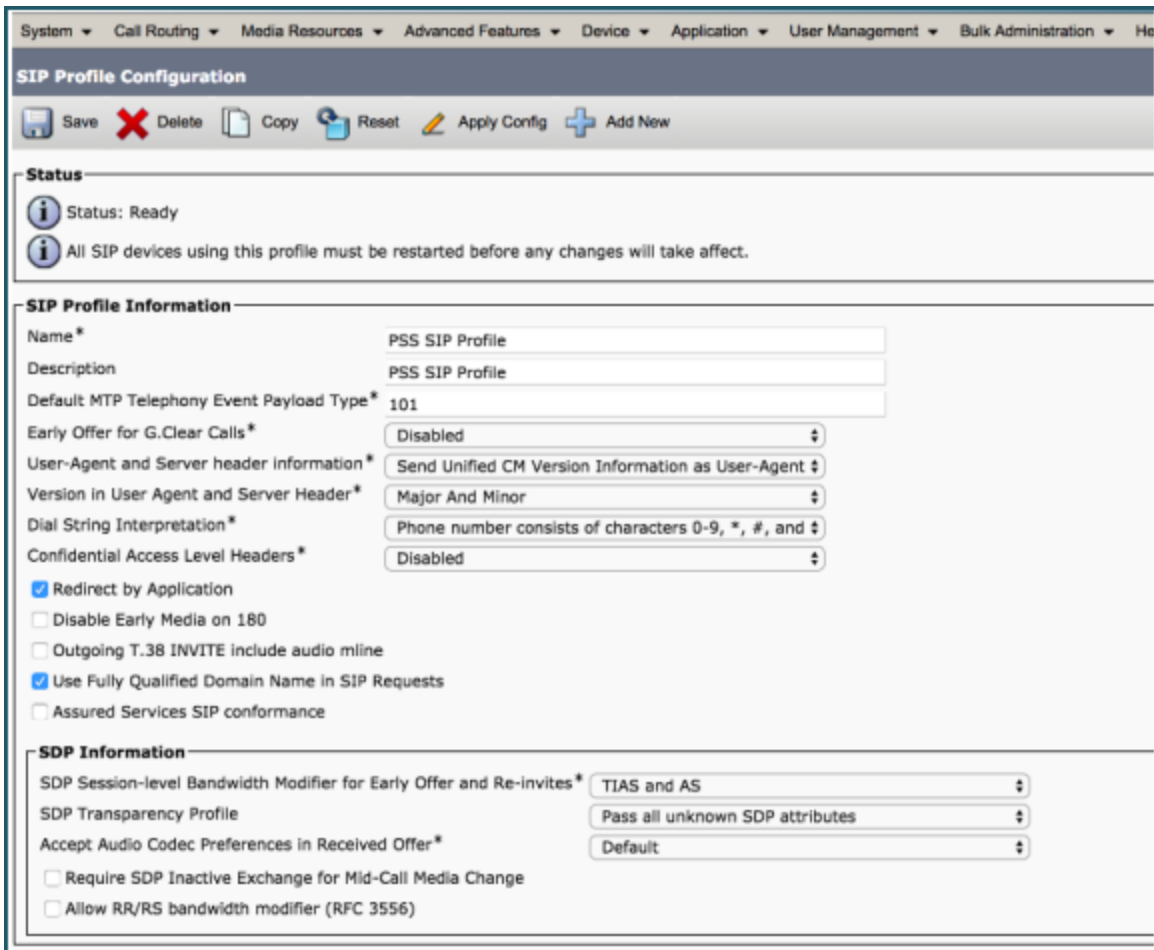
...ur [Technical Support](#) web site.

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)