Vocera Care Experience Rounding User Guide

Notice

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VCE-Production-Docs build 168

Contents

Introduction to VCE

This section introduces you to Vocera Care Experience (VCE), the details covered in this document, the product applicability, and the related documentation.

The Care Rounds solution streamlines, manages, and monitors the practice of rounding, enabling staff to conduct rounding more efficiently and with greater accountability, while providing meaningful and actionable data.

Rounding enables real-time capture of patients' voice and feedback as well as family or visitor comments. Staff ask patients key questions designed specifically to drive improved outcomes. Answers are captured and used to measure and track progress in patient experience, identify best performers among staff, get ahead of service issues proactively, and pinpoint opportunities for improvement.

The Care Rounds solution supports rounds on patients and staff in a manner aligned with workflows and goals. The solution can be tailored to support a wide variety of aims including patient experience and safety, staff engagement, and operational quality:

- **Patient experience and safety rounding:** Staff can address patient needs in a timely manner by sending service requests in realtime and use custom filters to stratify and prioritize patients according to various factors ranging from low satisfaction to round status, location, and diagnosis. Leaders can track a patient's experience from prior units and from other facilities in your health system, and track trends in patients' perception of care to identify opportunities for staff recognition.
- **Staff engagement rounding:** Provide protocols for staff coaching in diverse areas including hand hygiene, expressing gratitude, ensuring staff feel safe, and more. Use custom filters to identify staff with high risk for dissatisfaction or need for intervention, to prioritize them for staff rounding.
- **Operational quality rounding:** Monitor compliance with operational requirements; for example, fire safety. Track environment-of-care issues and gain insights needed for remediation. Support supervision of the general safety of the facility.

The **Business Intelligence** (BI) module provides multi-dimensional analysis of patient experience across units and different facilities within a health system to identify gaps and improve processes throughout the care continuum. In addition to key performance indicators like usage and trends, BI also provides sentiment analysis powered by artificial intelligence and machine learning. This valuable module provides accountability and transparency to the data, delivering key metrics to drive improvement and celebration to stakeholders.

Vocera provides three methods of consuming data:

- BI module dashboards provide near real time data and the ability to define a view of selected data which can be exported as a PFD, Image, or CSV format.
- Scheduled reports provide views of a variety of data, which arrives automatically in your inbox. Reports can be defined to arrive daily, weekly, monthly, or quarterly.
- A raw data export allows organizations the ability to import VCE data into their reporting or data warehouse for further analysis. This can be set up by contacting Vocera Support.

About this Guide

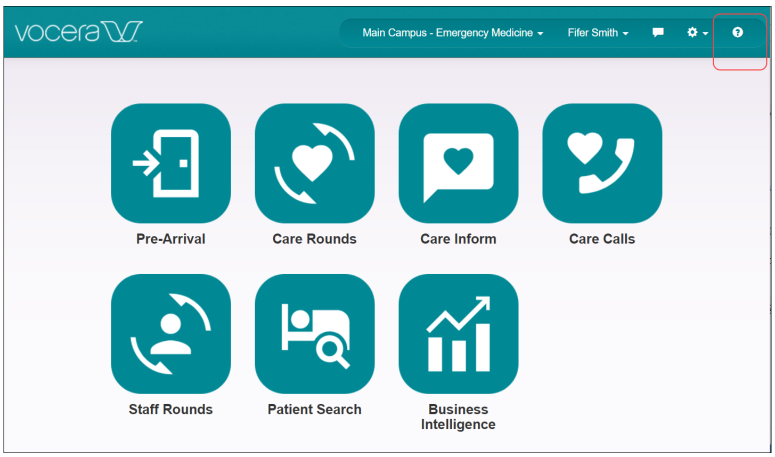
Vocera Care Experience Rounding User Guide describes how to use the VCE functionality. It starts with the basics, such as accessing the cloud based service.

The Introduction section contains an overview of the VCE product, including requirements and how to access your environment. Information that applies to all modules is provided here, such as navigation tools you will find throughout the application and patient search.

The Care Rounds module and the Business Intelligence module are each described in their own section of this guide.

All examples provided in this documentation use demo data, and images are sourced from a demonstration system; no personal health information (PHI) is exposed in this content.

Click the **Help** icon in the toolbar of the VCE application to access this Vocera Care Experience Rounding User Guide.



Getting Started

This section provides an overview of the Vocera Care Experience application and helps you understand how to work with the user interface.

VCE Overview

Vocera Care Experience is a cloud-based application providing access to a comprehensive suite of software solutions.

VCE makes it easy to facilitate effective communication and engagement with patients across the continuum of care; it helps improve care quality, patient safety, and patient perception, as well as staff engagement.

Our VCE software solutions are implemented as modules, and include Pre-Arrival, Care Rounds, Care Inform (formerly called Good to Go®), and Care Calls. The Business Intelligence solution provides information that can help reveal gaps and prioritize where improvements are needed to elevate patient satisfaction and reinforce treatment goals.

VCE is designed to work with the Windows Operating System, or an Apple tablet.

Feature Overview

Vocera Care Experience is composed of modules which provide the functionality to perform rounds in your facility.

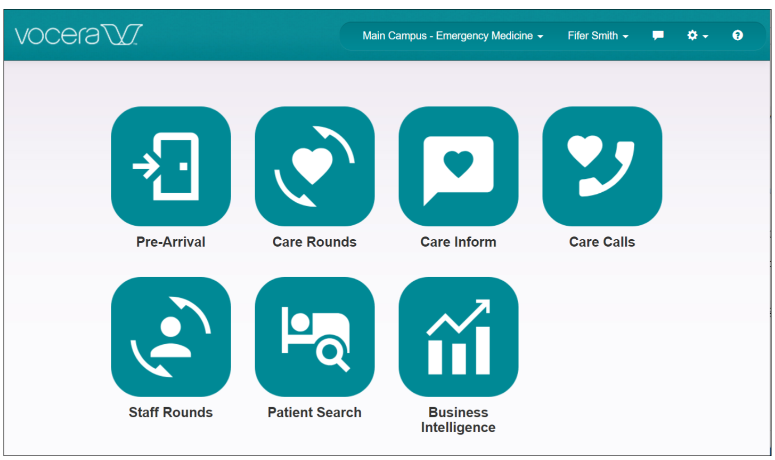
The functionality included in rounding may include a combination of the following, depending on your enterprise licensing agreement:

- Care Rounds
  Provides a system-wide way to track patient feedback. Rounding enables real-time capture of patients' voice and feedback as well as family or visitor comments.
- Staff Rounds
  Provides a system-wide way to track and recognize staff members. Rounding enables real-time capture of staff comments or concerns.
- Patient Search
  Provides access to patient details for a current admission, and a three year historical view. Search can be performed on patient names, as well as medical record numbers.
- Business Intelligence
  Provides information that can help reveal gaps and prioritize where improvements are needed to elevate patient satisfaction and reinforce treatment goals.

All the modules you are licensed to access will display in the module selection page, along with a toolbar enabling you to work with product features.

You can click on the Vocera logo in the top left corner of the browser to display the module selection page. This option is available from most VCE pages.

The modules displayed in the selection page provide easy access to functionality the enterprise has licensed for your use. The Toolbar menu provides access to tools such as the Locations menu, user account logout, and management tools; refer to Working with the Toolbar on page 12 for instruction.



Understanding VCE Requirements

Please refer to the Vocera Care Experience section of the Vocera Release Notes Library on the **Vocera Documentation Portal** for requirement information.

Accessing your VCE Application

Using the URL provided in email by your Client Services Manager, you can sign into a cloud-based VCE instance to access the rounding features and supporting functionality, such as patient search.

Enter the URL provided by your Client Services Manager into the web browser address bar to display the VCE sign in page. You can sign into VCE using the individual credentials sent to you in email.

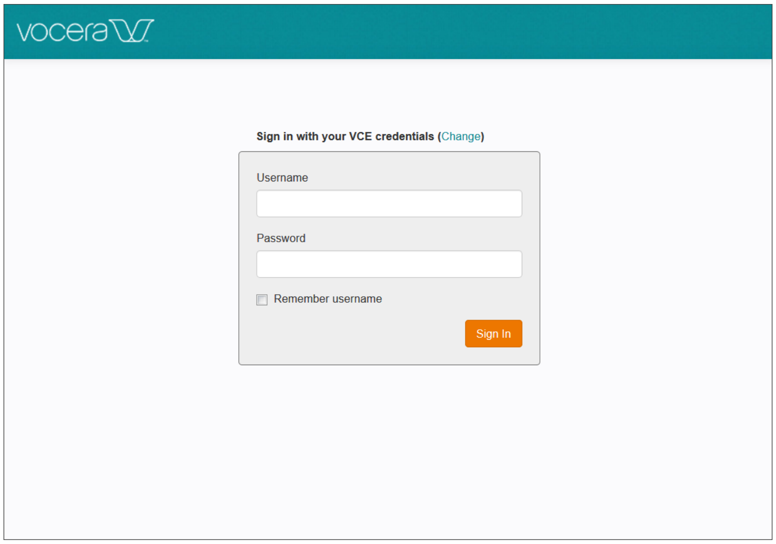
Alternatively, when the enterprise has established an integrated authentication you will sign in with the specified enterprise credentials.

Signing into VCE using your Credentials

Use your individual credentials to sign into your cloud-based VCE instance in a web browser.

The "Sign in with your VCE Credentials" dialog provides the option to sign in with your individual credentials, or if specified by the Client Services Manager, an enterprise credential. Refer to Signing into VCE using an Enterprise Credential on page 8 for instruction.

1. Enter the username and password for your individual credentials in the fields provided in the "Sign in with your VCE Credentials" dialog.



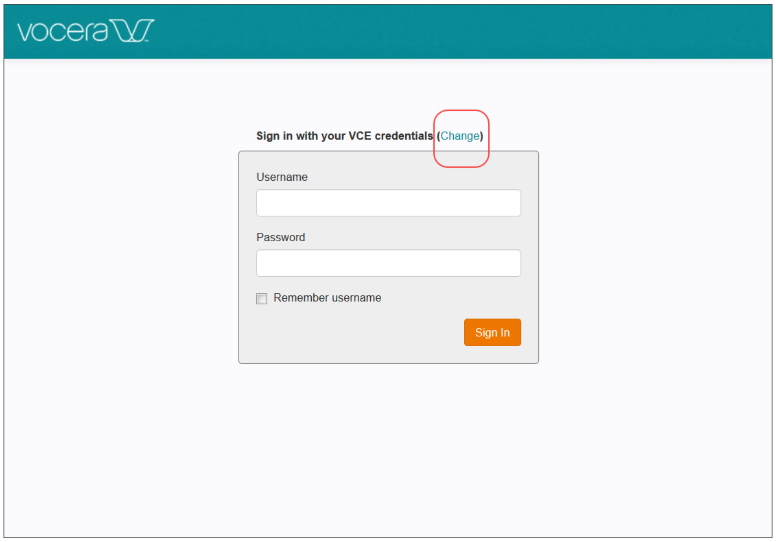
2. Check the **Remember username** box to autopopulate your username on subsequent logins.
   Select the Remember username checkbox if you are signing onto a personal device that you will always use to access the application. When this checkbox is activated, your username will be retained and you only have to enter your password.
3. Select **Sign in** to access VCE.
   The VCE **Home** page displays.

Signing into VCE using an Enterprise Credential

If specified by your Client Services Manager, you may be required to sign into VCE using an enterprise facility code.

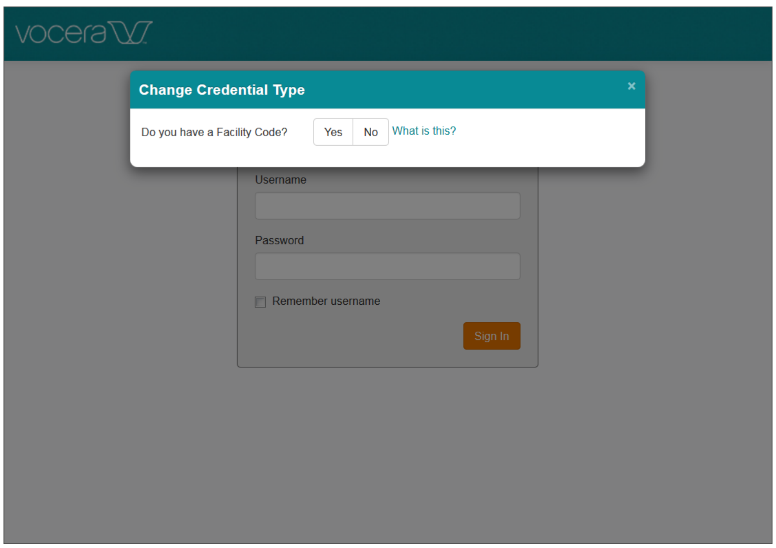
After this initial one-time login, you will sign in with your individual credentials. Refer to Signing into VCE using your Credentials on page 8 for instruction.

1. Select **Change** in the "Sign in with your VCE Credentials" dialog.



The Change Credential Type dialog displays.

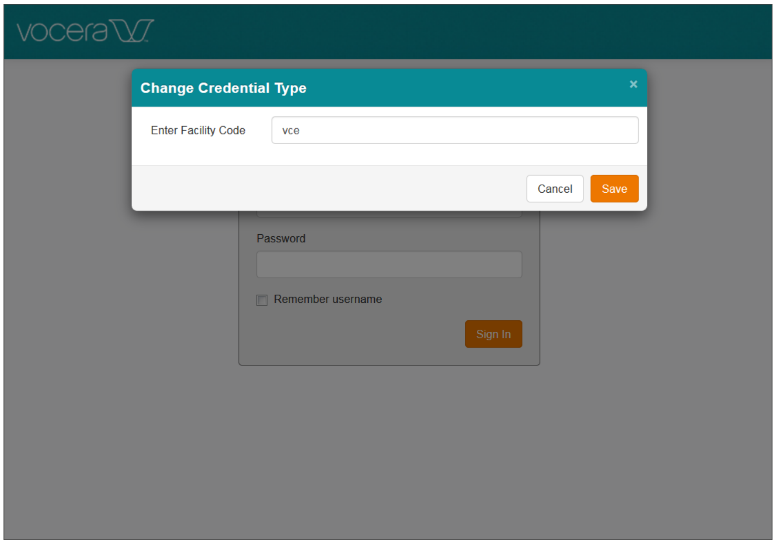
2. Select Yes in the **Change Credential Type** dialog to sign in.



Choose an option to exit the dialog:

- **Yes**: If the Client Services Manager has provided you with enterprise credential to access VCE.
- **No**: Return to the sign in dialog without making a change.
- **What is this**: Select this option to display additional information.

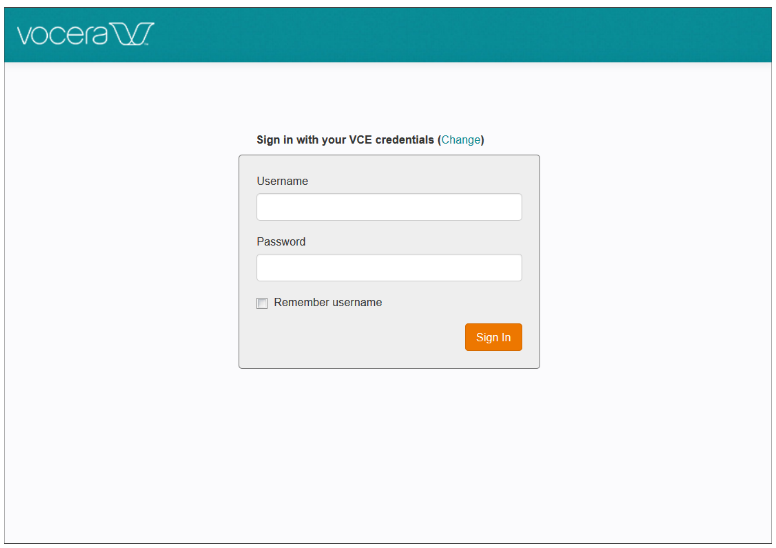
3. Enter the facility code provided by your Client Services Manager in the **Enter Facility Code** field.



Choose an option to exit the dialog:

- **Save**: Submit the facility code for authorization in the system, and display the login dialog.
- **Cancel**: Return to the sign in dialog without making a change.

4. Enter the username and password for your individual credentials in the fields provided in the "Sign in with your VCE Credentials" dialog.



5. Check the **Remember username** box to autopopulate your username on subsequent logins.

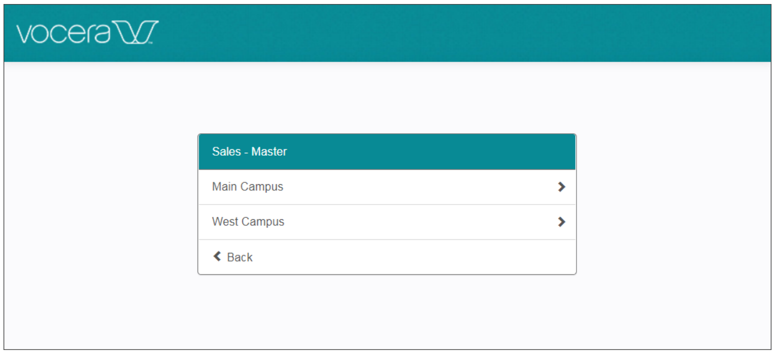
   Select the Remember username checkbox if you are signing onto a personal device that you will always use to access the application. When this checkbox is activated, your username will be retained and you only have to enter your password.
6. Select **Sign in** to access VCE.

   The VCE **Home** page displays.

Navigating VCE

From any module in VCE you can navigate to facilities and units you need to access, using the Locations menu, the Locations field in a module's toolbar, or breadcrumbs in the module.

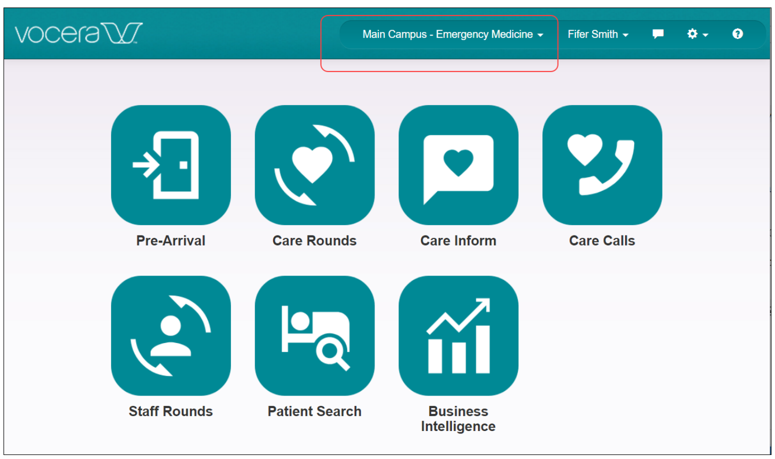
Upon signin, the VCE application displays the Locations menu where you must choose the facility, health system, or campus, and then the unit that you want to work with.



The facilities and units which display in the Locations menu will depend upon your access permissions. Refer to Choosing a Facility Unit on page 12 for more information.

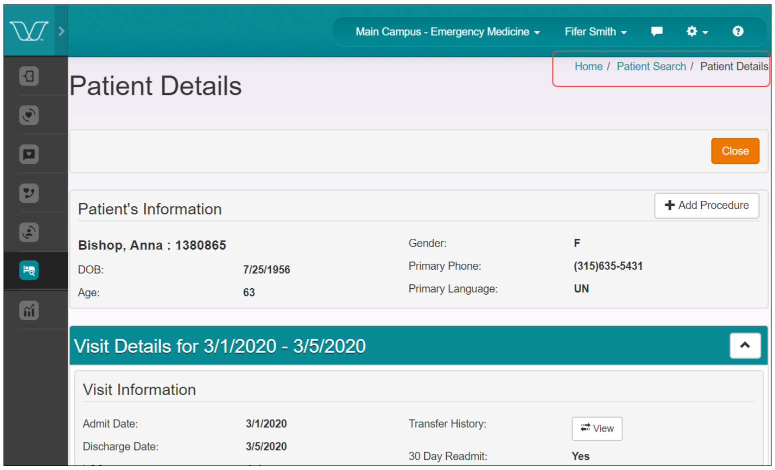
You can select the Back arrow to display the Health System menu. In this example, the Health System is Sales - Master. Otherwise, you can select a facility arrow, such as the Main Campus facility, to navigate to the units in that facility.

Once you have accessed the unit you need, the Home page displays as shown below. In this example, the toolbar shows that you are viewing the Main Campus - Emergency Medicine unit. Using the Location toolbar on this page you can navigate back to the Locations menu.



On this Home page you can select a module to work with by clicking the icon, such as the Patient Search module.

Once you have accessed a module, you can use the breadcrumbs to navigate back through your path to the Home page. For example, you can navigate back to Patient Search from the Patient Details page shown here,



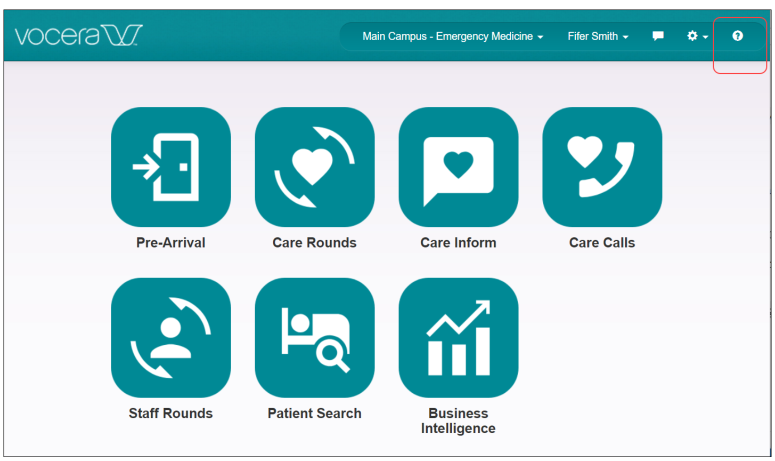
Note: The Care Rounds module does not display breadcrumbs. It has been redesigned with an enhanced navigation menu.

Working with the Toolbar

You can change locations, edit your user account, provide VCE feedback, and access management tools in the Toolbar in the module screens.

Depending on the enterprise licensing permissions, you may have access to management functionality. See your Client Services Manager for assistance.

You can click the **Help** icon in the toolbar of the VCE application to access this Vocera Care Experience Rounding User Guide.



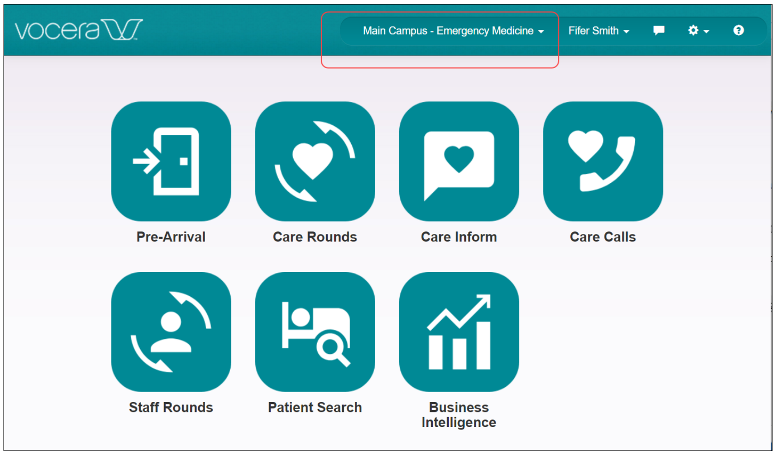
The Vocera Care Experience Rounding User Guide opens in a new browser window. To return to the VCE application, click on the browser window where the application is running.

Choosing a Facility Unit

Depending on licensing established by your enterprise, you may access multiple facilities and units in your VCE environment.

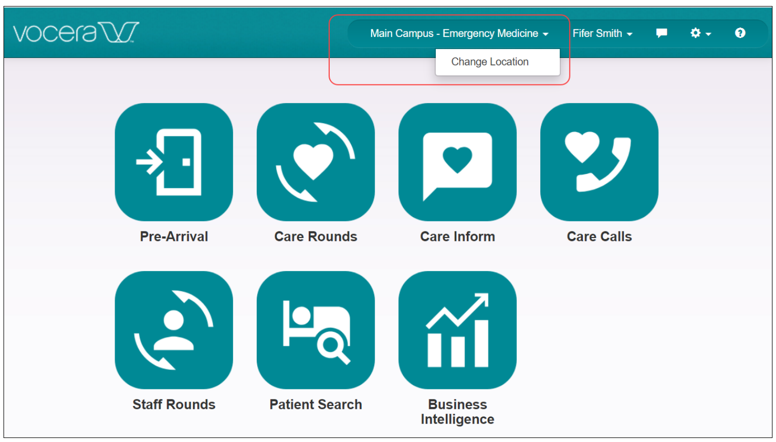
Refer to Navigating VCE on page 10 for additional information about VCE navigating a Health System.

1. Click the unit displayed in the VCE toolbar. In this example, "Main Campus - Emergency Medicine" is the current facility and unit.



The Change Location link displays.

2. Click **Change Location**.

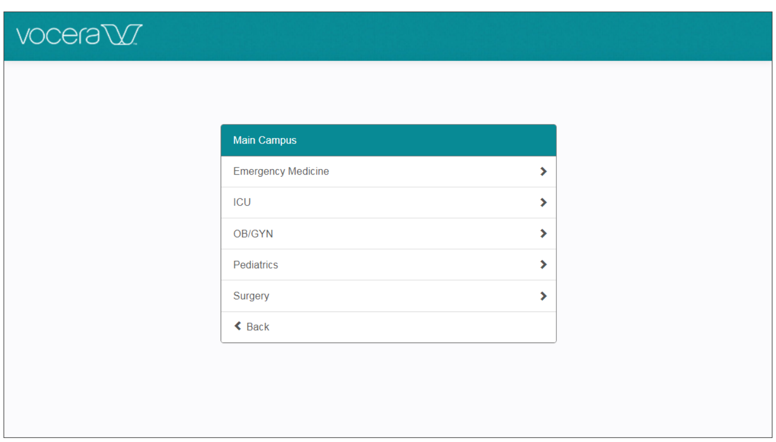


The facility's units menu displays.

3. Use the arrows to navigate to the unit or facility needed.

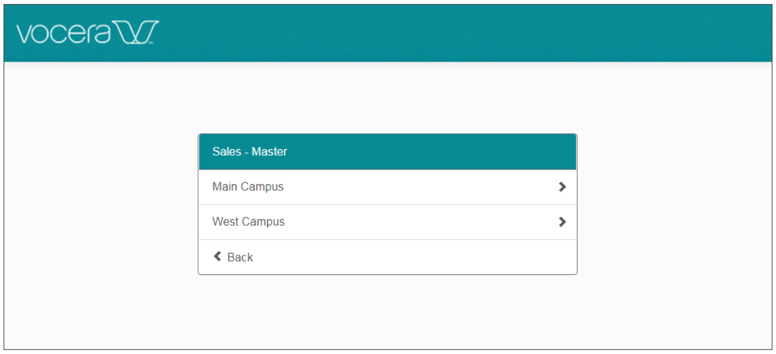
   In this example, the Main Campus facility displays several units you may access, such as ICU.

   Click the Back arrow to navigate to the facility menu, if your account is configured to allow access to multiple facilities.



The Facility menu displays.

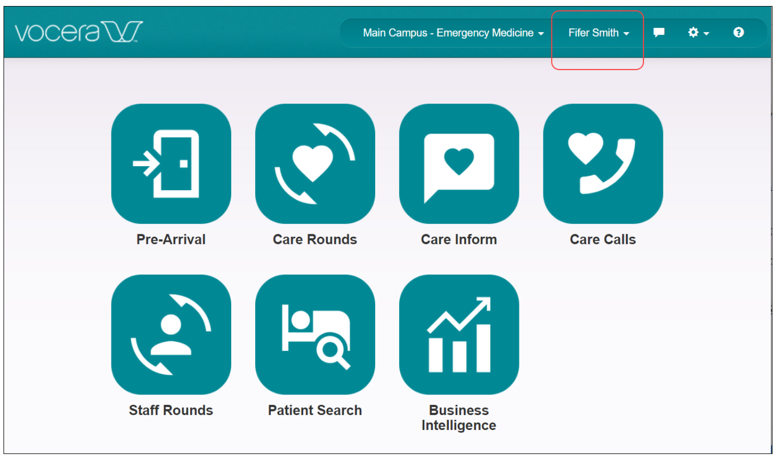
4. Click the Back arrow to display the Health System menu, if your account is configured to allow access to multiple Health Systems.



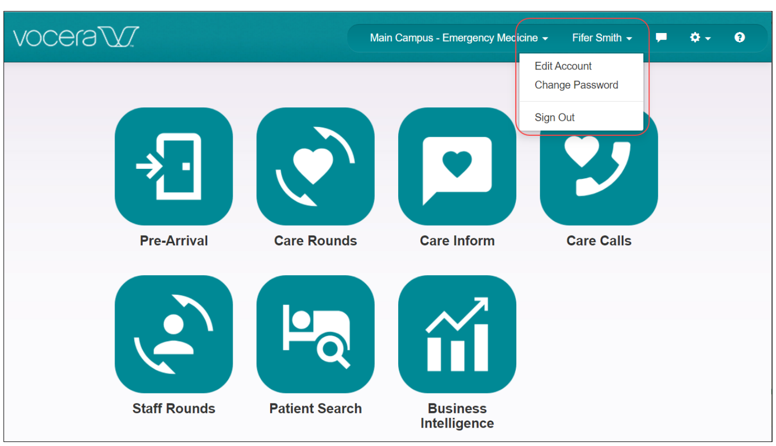
Changing your Account Information

Sign out of your VCE instance, or manage the account details, such as the password or contact information, for the currently signed in account.

1. Click on the user account displayed in the toolbar. In this example, "Fifer Smith" is signed into VCE.



   The user account menu displays.
2. Select an option from the menu in order to manage your user account.

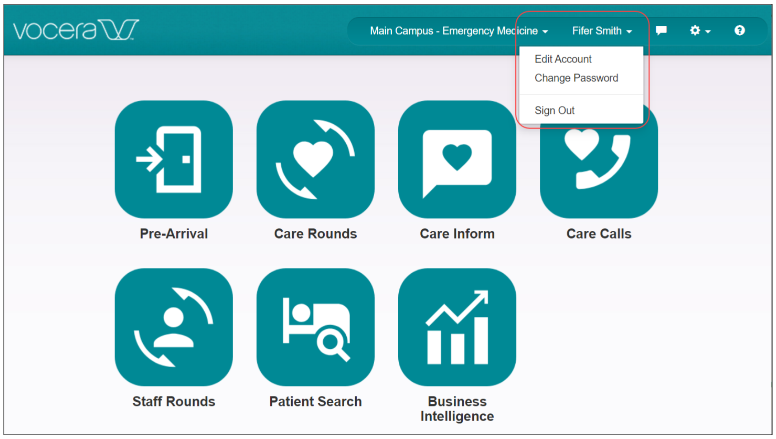


Editing your User Account

Revise the contact information for the user account, such as the email address and phone number.

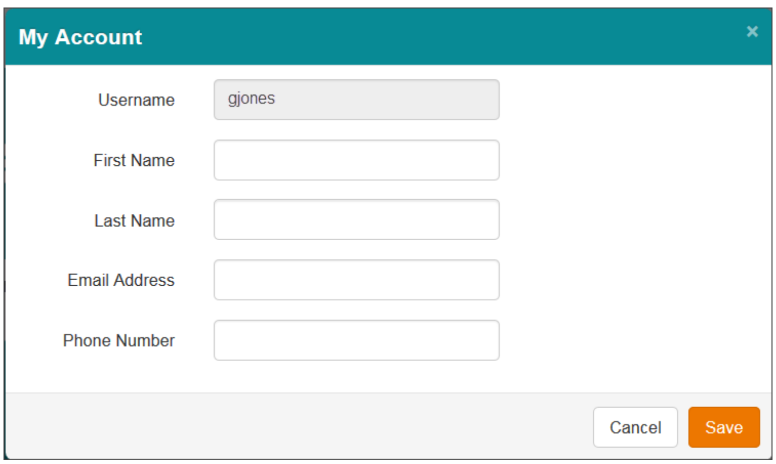
The username is not editable, and the first and last name are required.

1. Select **Edit Account** in the user account menu.



2. Complete the user account information in the My Account fields.

Note: The Username field cannot be edited or removed.



3. Use the information in this table to complete the My Account fields.

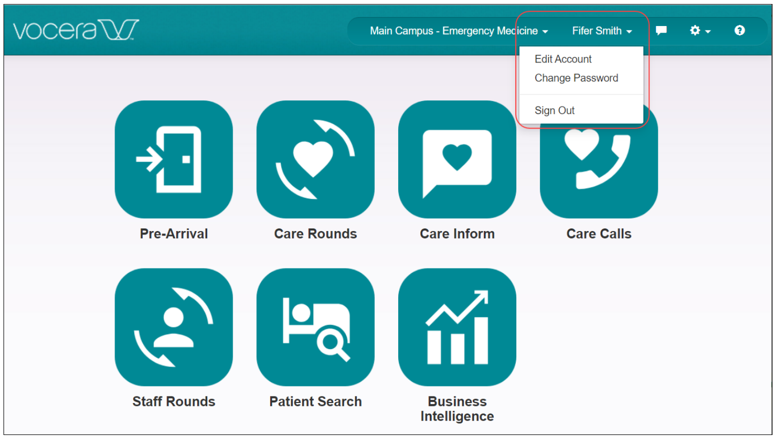
Setting	Description
Username	Uniquely identifies the user account. Cannot be revised.
First Name	Enter the first name for the user account. Required.
Last Name	Enter the last name for the user account. Required.
Email Address	Enter the email address for the user account.
Phone Number	Enter the phone number for the user account.

4. Select an option to exit the My Account dialog:
   - **Save**: Save the changes to your user account and close the dialog.
   - **Cancel**: Close the dialog without making a change to your account.

Changing your Account Password

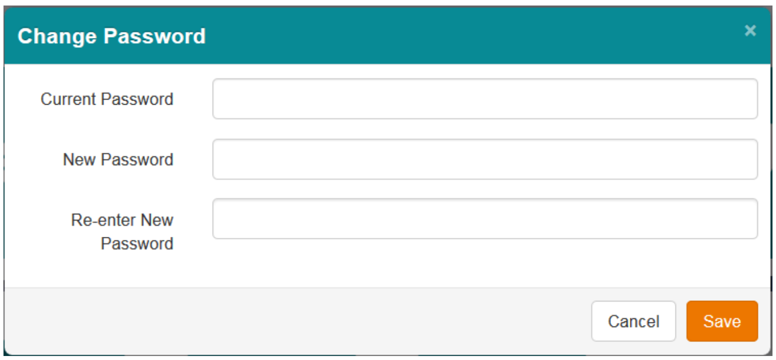
Change your VCE password from the user account option in the toolbar.

1. Select **Change Password** in the user account menu.



2. Complete the password information in the **Change Password** fields.

Note: The password must be at least eight characters, using letters and numbers and one or more special characters.

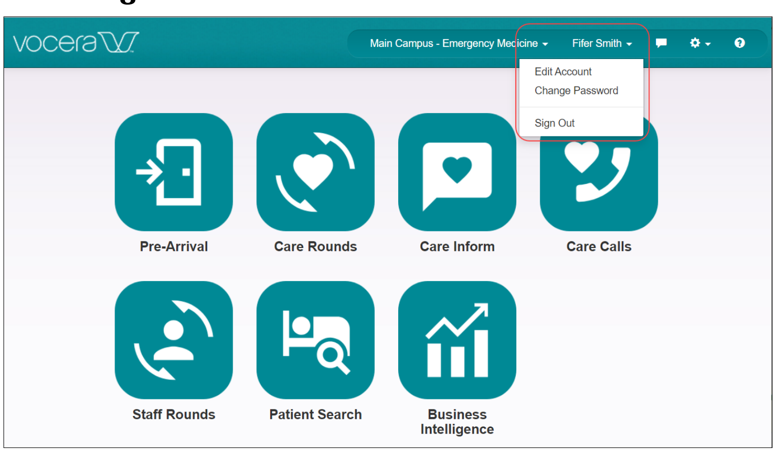


3. Select an option to exit the **Change Password** dialog:
   - **Save**: Save the new password and close the dialog.
   - **Cancel**: Close the dialog without changing your password.

Signing Out of your VCE Instance

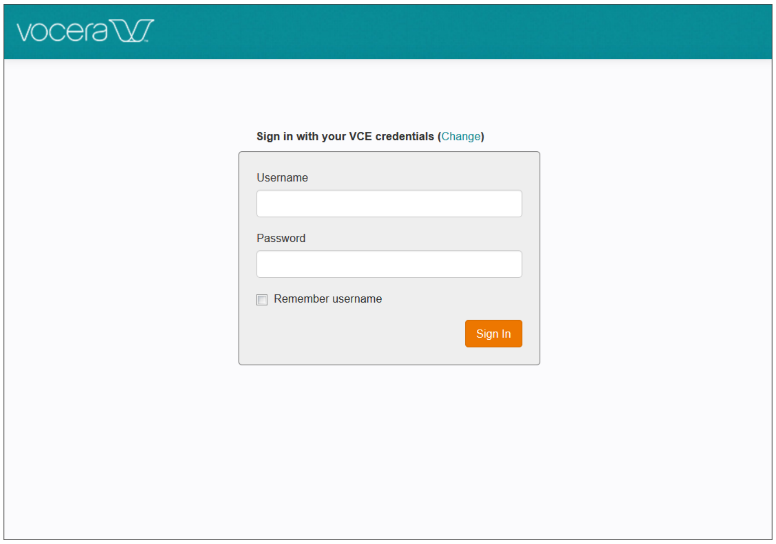
Select your user account in the VCE toolbar to access the signout option.

1. Select **Sign Out** in the user account menu.



   The sign in dialog displays.

2. Sign into VCE to resume working. Otherwise, close the browser window to complete your exit.

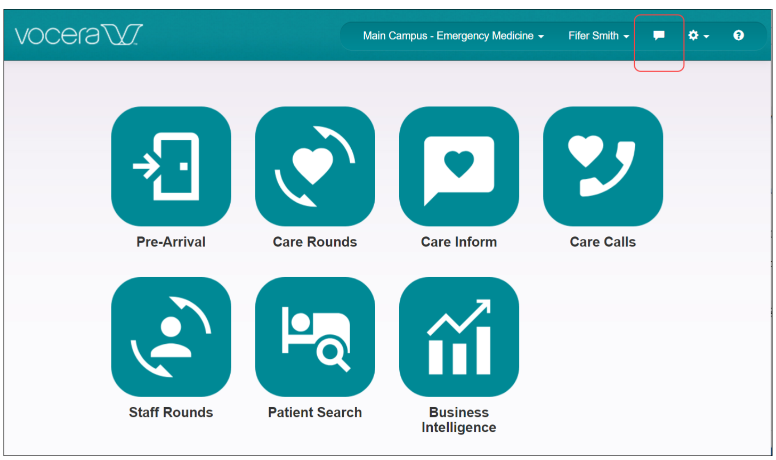


Providing VCE Feedback

Send a text message directly to Technical Support with your feedback, problem, or suggestion regarding the VCE product.

Messages are delivered to the VCE Technical Support group, and are escalated to VCE Professional Services as needed. Please contact your Client Services Manager with any questions you may have about this feedback option.

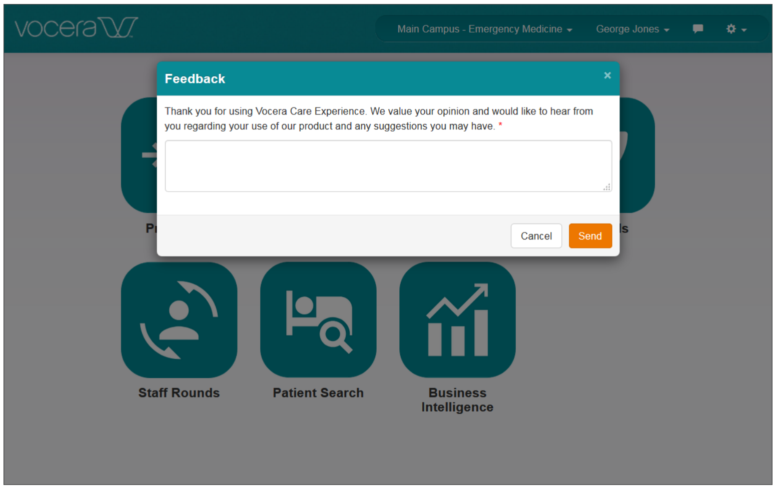
1. Select the message icon in the toolbar.



   The Feedback message dialog displays.

2. Type your message in the Feedback text field. The dialog provides the following comment:

   Note: Thank you for using Vocera Care Experience. We value your opinion and would like to hear from you regarding your use of our product and any suggestions you may have.



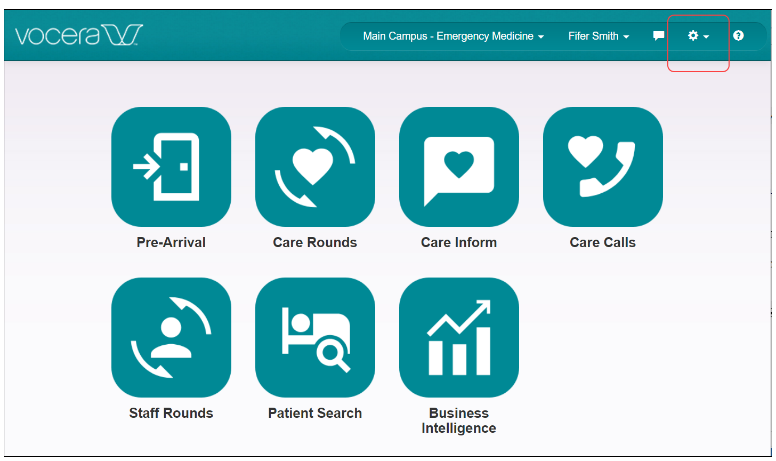
3. Select an option to exit the Feedback dialog:
   - **Send**: Send your composed message and close the dialog.
   - **Cancel**: Close the dialog without sending feedback to VCE.

Using Management Tools

Locate your VCE instance version number, and access management tools in the dropdown menu.

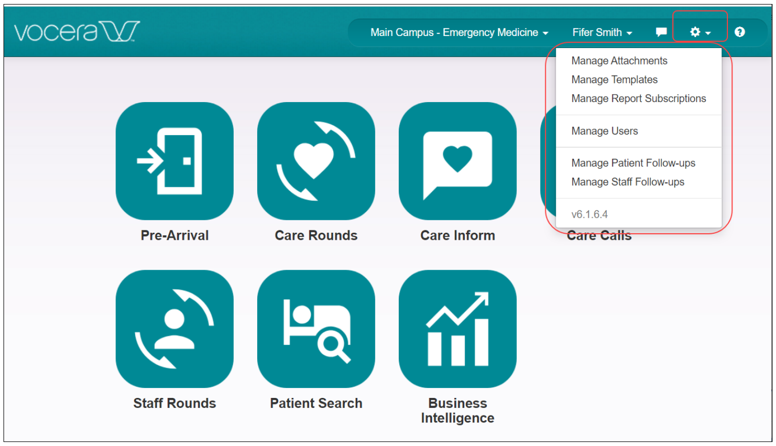
The options displayed in the management tools dropdown menu depend on the permissions authorized for your user account. Contact your immediate supervisor or the VCE Client Services Manager for assistance if you require access to additional functionality.

1. Select the gear icon in the toolbar.



   The management tools menu displays.
2. Select an option from the menu.

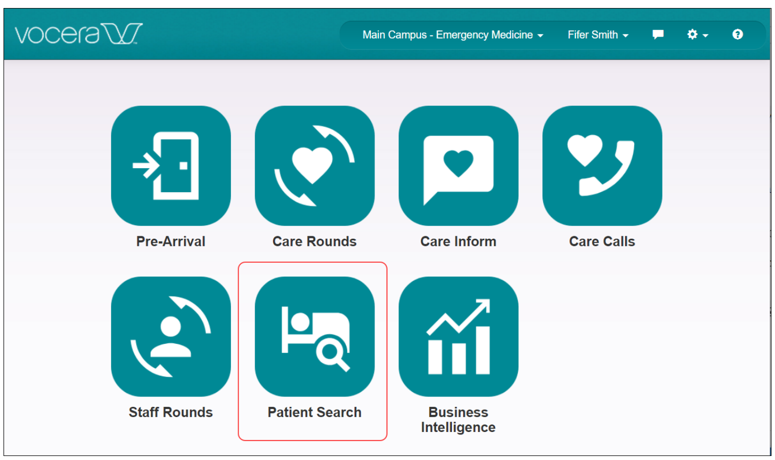
Note: The version number is display only. Contact your Client Services Manager for access to a different VCE version if needed.



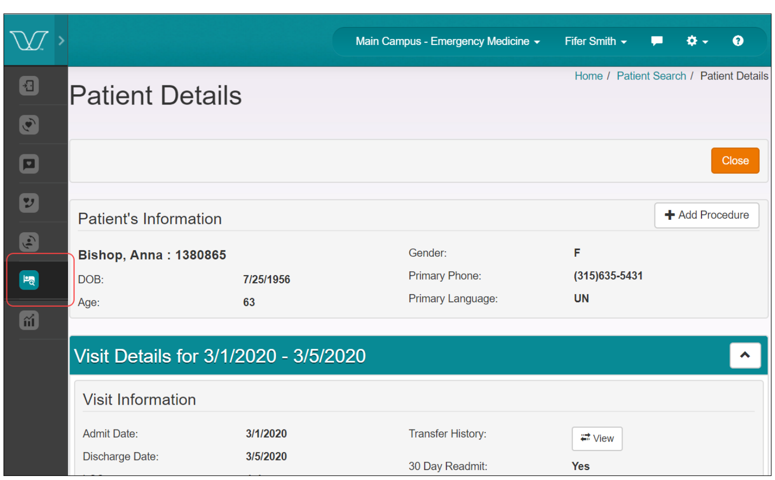
Working with Patient Search

Use the Patient Search module to locate a patient and view their visit history, whether currently an inpatient or discharged from your facility.

You can access the Patient Search module from the VCE home page.



You can also access the Patient Search module in the VCE left navigation from any module. This image shows the Patient Search icon in the left navigation on the Patient Details page.

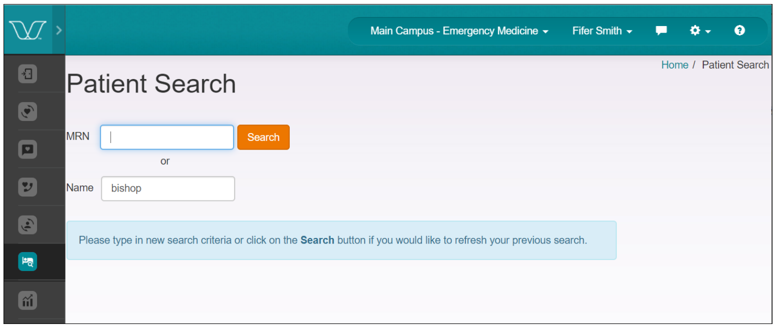


Searching for a Patient

Enter characters to search by name or medical record number and return a list of patient names meeting your search criteria.

1. Enter search terms to identify a selected patient in the Patient Search fields. For example, enter "smi" in the Name field to return a list of patients with those letters in their first or last name, such as Smith.

   Enter at least three characters in the MRN or Name fields. The Search button displays orange, indicating the search can be executed. The cursor displays a red circle with a slash across when the Search button is selected but the characters entered do not meet the search criteria.



2. Use the information in this table to understand the search fields criteria.

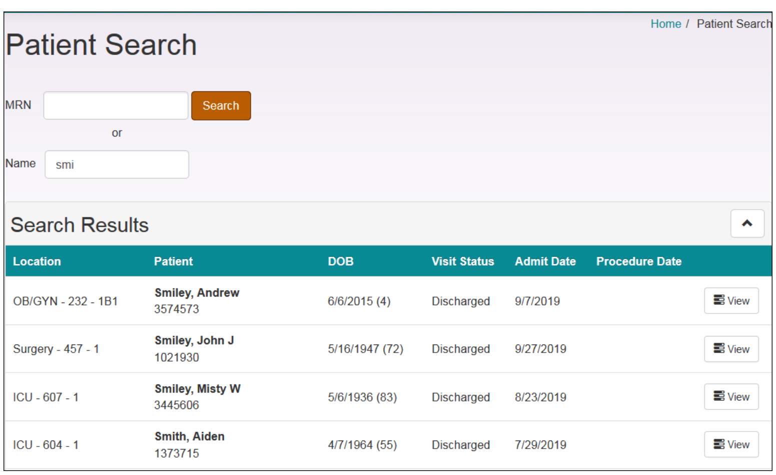
Setting	Description
MRN	Enter the medical record number for the patient.
Name	Enter the name of the patient in the Name search field. The search is performed on all patients in the locations which you are authorized to access, and on all patient names (first, last, middle) containing the characters submitted in the Name field.

3. Select **Search**.

   The search results display in a table below the search fields.

4. Sort the patient list displayed in the Search Results table below the search fields, as needed.

   Use the chevron icon in the Search Results bar to toggle between the hide and display options. The search results list is displayed when the chevron points up; click the chevron to hide the list. Then the chevron points down, indicating that you can click it to display search results.



5. Use the information in this table to work with the results returned by the search criteria. Click on a column heading to sort the table by that setting; a chevron appears, allowing you to toggle the sorted table in ascending or descending order.

Setting	Description
Location	Identifies the facility unit and bed where the selected patient is located, or was located at the time of discharge.
Patient	Identifies the selected patient by name and medical record number.
DOB	Identifies the patient date of birth followed by the patient's age in parentheses.
Visit Status	Identifies the patient's current status as Discharged, In Hospital, or shows an empty field.
Admit Date	Displays the date when the patient was last admitted to the facility.
Procedure Date	Displays the date when the patient is scheduled to receive a procedure.
View	Click **View** to display the Patient Details page for the selected patient. Refer to Viewing Patient Visit Details on page 21 for more information.

6. Select the desired patient in the Search Results list, or use the search fields to further filter the list of patients displayed.

Next, view the visit details for a selected patient. Refer to Viewing Patient Visit Details on page 21 for more information.

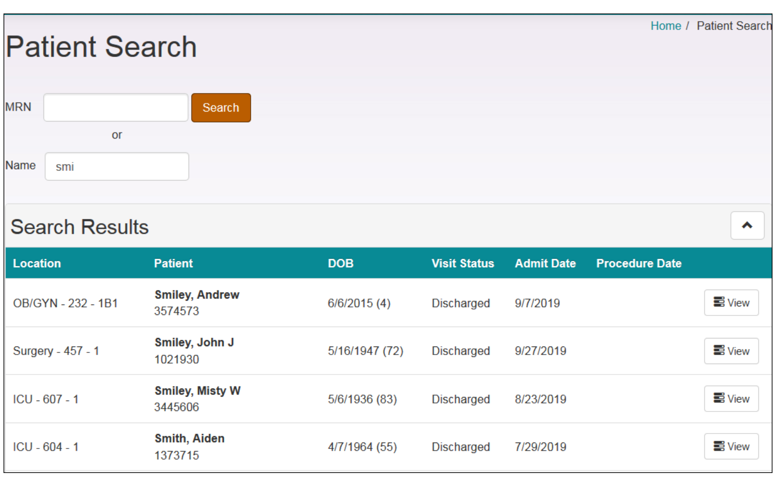
Viewing Patient Visit Details

After locating a patient in Patient Search, you can access the Patient Details to view the record of their visits.

Patient Details provides access to a record of the patient's visits in the past three years that includes admit, discharge, and transfer history. Any associated VCE module records for the patient can also be accessed from the search results.

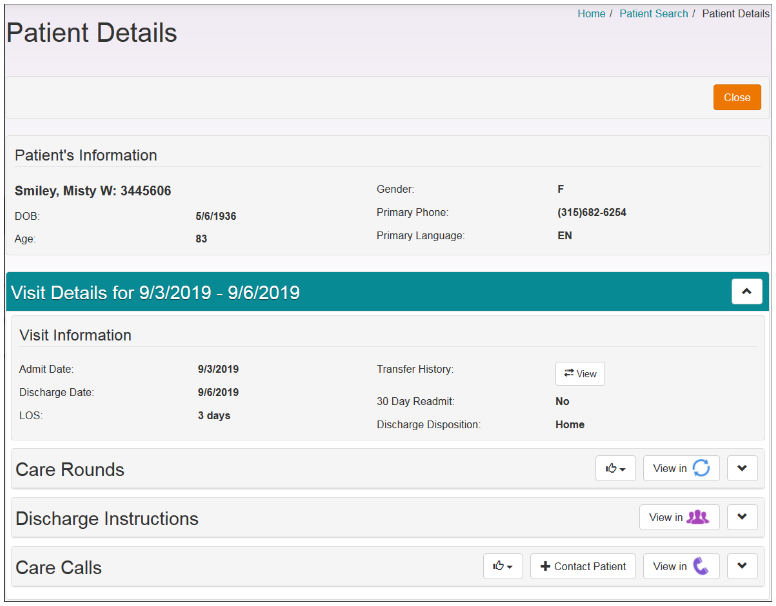
Note: The information described in this section is comprehensive. Users are generally granted access to only the information needed to perform their required tasks. You may not see all of the functionality described here, depending upon the permissions assigned to your user account.

1. Select **View** in the last column in the Search Results table for the patient of interest.



The Patient Details page displays.

2. View the **Patient Details** page for the selected patient.



3. Review the details provided in the **Patient's Information** section.

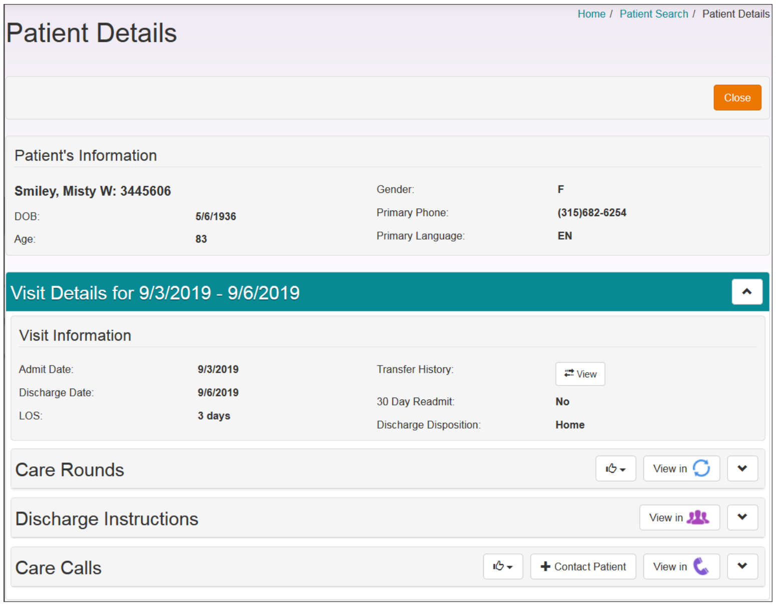
Setting	Description
Patient	Identifies the selected patient by name and medical record number.
DOB	Displays the patient's date of birth in month/day/year format.
Age	Displays the patient's age in years.
Gender	Displays the patient's gender.
Primary Phone	Displays the patient's contact telephone number, if provided.
Primary Language	Displays the patient's primary language, if provided.

4. Review the information provided in the **Visit Details** section.

Setting	Description
Admit Date	Displays the patient's most recent admission date in month/day/year format.
Discharge Date	Displays the patient's most recent discharge date in month/day/year format.
LOS	Displays the patient's length of stay (LOS) in days.
Transfer History	Displays an icon to access the patients transfer history in a new window. Refer to Viewing Patient Transfer History on page 23 for instruction.
30 Day Readmit	Displays Yes or No to indicate if the patient has been readmitted within the past 30 days.
Discharge Disposition	Displays the location the patient was last discharged to, if applicable.

5. View the associated VCE modules listed in **Visit Details**.

   In this example, Care Rounds, Discharge Instructions, and Care Calls modules are associated with the selected patient. Use the icons in the menu bars to change the round status for the patient, to navigate into the associated module, or choose to hide or display the module's summary of data for the patient. Refer to the relevant module documentation for additional information.



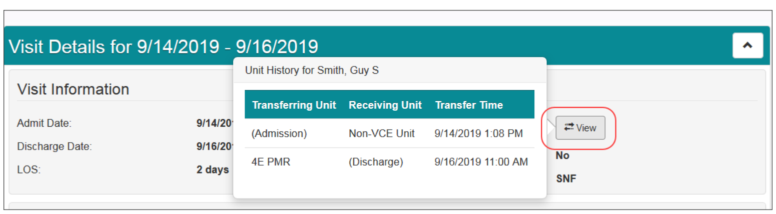
Next, select **View** to access the transfer history for the selected patient.

Viewing Patient Transfer History

Using the Patient Search module, you can access a record of a patient's transfers between units in a facility.

Navigate to the Patient Details page and view the Visit Details section.

1. Click the **View** icon in the Transfer History field. Refer to Viewing Patient Visit Details on page 21 for more information.



The Unit History popup window opens on top of the Visit Details.

2. Use the information in this table to understand the record of transfers provided in the Unit History.

Setting	Description
Transferring Unit	Identifies the unit where the patient originated. Entry includes admission, or the name of the unit.
Receiving Unit	Identifies the unit the patient moved to. Entry includes discharge, or the name of the unit.
Transfer Time	Identifies the date and time when the patient was transferred into or out of the unit.

3. Click **View** again to close the Unit History popup window.

Working with Care Rounds

The Care Rounds solution streamlines, manages, and monitors the practice of rounding, enabling nurse leaders to conduct rounding more efficiently and with greater accountability, while providing meaningful and actionable data.

Viewing the Patient List

Patient information is provided in a grid which can be filtered to display the data you need for your tasks.

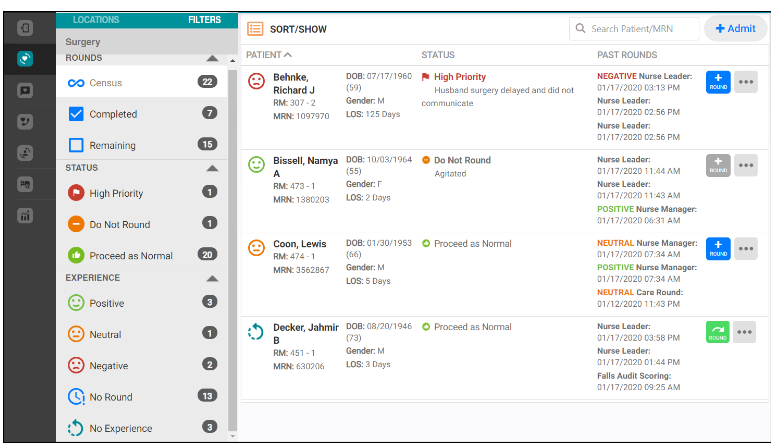
In the patient grid, you can:

- Search for a patient by name or medical record number
- Show specific patient information in the grid, such as diagnosis and length of stay
- Sort the grid by a desired patient parameter, such as location or language

Note: Selections made to sort and show information as described in this section will be retained until you change them. Unless changed, you will see the current selections with each subsequent login.

Click a column label to sort the display by patient name, round status, or past rounds. A chevron appears at the top of the column, indicating the patients are sorted in ascending or descending order.

In this example the Patient column displays the chevron pointing up; the patients in the list are sorted by name in descending alphabetical order.



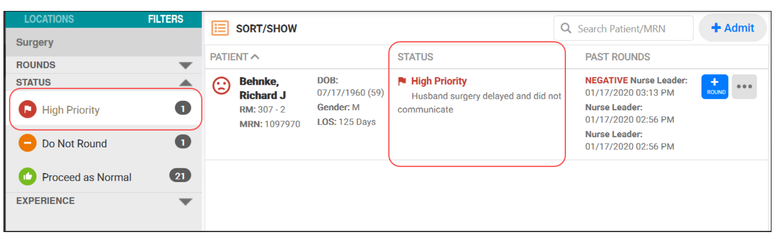
Column Label	Description
Patient	Displays the selected patient's information. Refer to Customizing the Patient Information Display on page 26 for details.

Column Label	Description
Status	Displays the current rounding status for the selected patient. Options are High Priority, Do Not Round, and Proceed as Normal. Refer to Changing a Round Status on page 42 for details.
Past Rounds	Displays the date and type of round performed, along with the color-coded Experience value for a quick visual reference. Up to three past rounds display, if available.
Round	Displays the New Round list where you can select a round type to initiate for the patient. This icon may be blue, green, or gray. Refer to Using Rounding Surveys on page 35 for details.
Admit Discharge Transfer	Admit Discharge Transfer (ADT) options are visible when the customer does not have an automated ADT service. The **Admit** button at the top of the page, and the **More Options (...)** icon in the right hand column, allow you to manually perform ADT functions such as Admit Patient, Cancel Patient Admit, Discharge Patient, and Transfer Patient. The user must be assigned Vocera Care Rounds “Patient Manager” rights. The functionality can be assigned at the unit level.

By default, the Filters menu displays with Rounds set to Census. This displays the entire patient population for the location selected.

You can select an item in the Filters or Locations menus to restrict the list of patient displayed in the grid. For example, select High Priority in the round Status menu to filter when you wish to identify the patients who should receive a round survey at the next opportunity.

Refer to Navigating Menus on page 29 and Filtering the Patient List View on page 32 for more information.



Searching for Patient Information

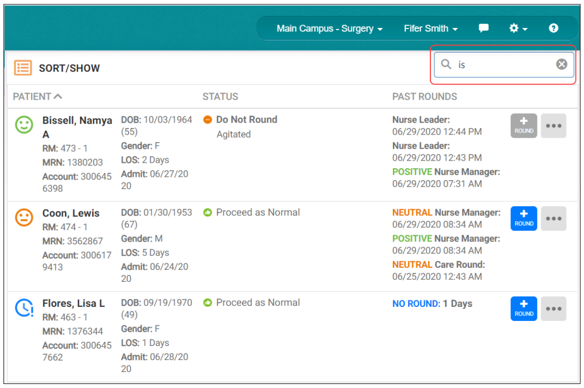
You can search by name or medical record number to display the list of patients that you wish to work with.

Search is performed on the location currently displayed in Care Rounds. To search across multiple locations, use the Patient Search module; refer to Working with Patient Search on page 19 for details.

A minimum of two characters are required to initiate a search. Special characters, including a space, are not allowed.

1. Enter characters in the Search field in the patient grid.

   As you type, Search finds the closest match.



2. Use the following guidance to enter characters in the Search field.

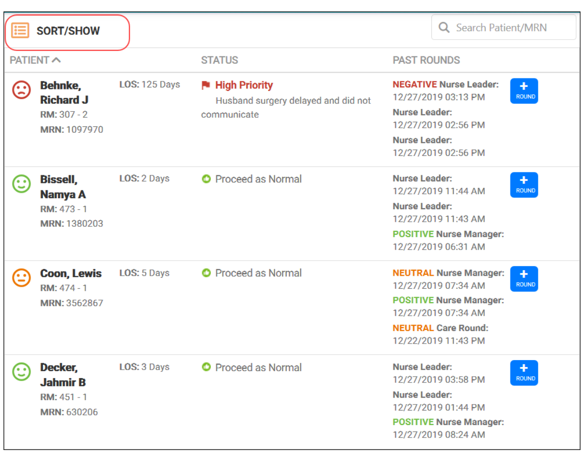
Search Term	Description
Name	Enter letters in the search field to display the list of patient names containing the string. Search is performed on the first, middle, and last name fields. For example, enter three letters to return all patients in the location whose first or last name contains the three-letter string. In this example, enter "is" to return patients named Namya Bissell and Lisa Flores.
MRN	Enter numbers in the search field to display the list of patients with a medical record number (MRN) that contains the string. For example, enter three numbers to return all patients in the location whose MRN contains the three-letter string in any position in the number. Enter "36" to return two patients with the MRNs 360080 and 225362.

Next, select the patient you wish to work with in the search results.

Customizing the Patient Information Display

In addition to required characteristics, such as the patient name or account number, you can display as much or as little of the patient information in the grid as you wish to view.

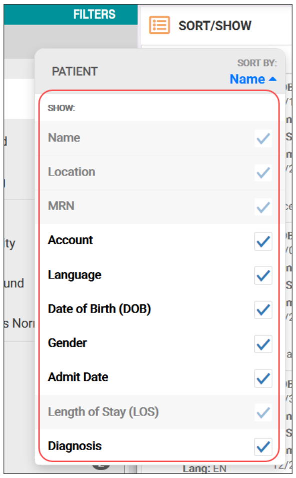
1. Click the **Sort/Show** icon in the patient grid.



The Sort/Show dialog displays.

2. Check the boxes in the **Show** dialog which correspond to the patient information you wish to display in the patient grid. The display updates in real time as you make selections.

Note: By default, some boxes cannot be unchecked. The patient name, MRN, location, and LOS are required in the system.

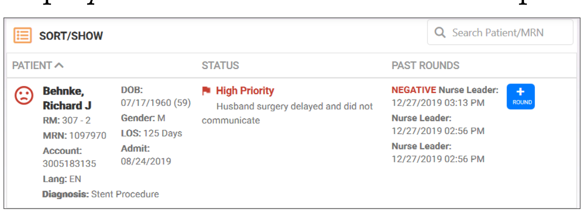


The following table describes the parameters in the Show list.

Note: The following is a superset of options; the settings implementated at your facility may not include all shown in this table.

Show Label	Description
Name	The first name, middle initial, and last name of the patient.
Location	The unit and bed where the patient is admitted.
MRN	The patient's medical record number.
Account	The patient's account identifier.
Language	The language spoken by the patient.
DOB	The date of birth of the patient, in mm/dd/yyyy format, followed by the patient age.
Gender	The identified gender; M or F.
Admit Date	The date the patient was admitted.
LOS	The length of stay identifies the number of days and hours that the patient has been admitted.
Diagnosis	The reason the patient is admitted to the facility.

3. Click the **Sort/Show** icon to close the dialog.
4. View the patient information displayed by the Show characteristics as they are selected. This example displays all the characteristics for the patient.

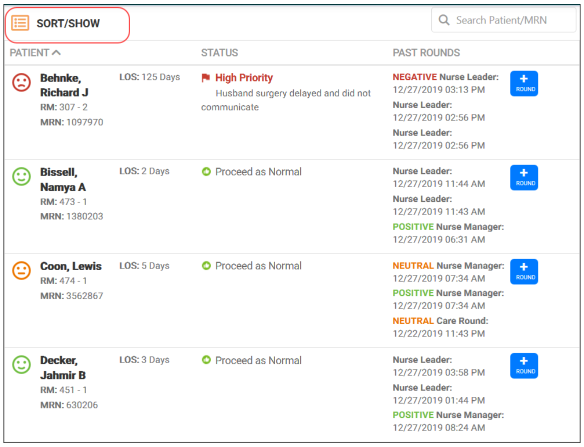


Sorting By Patient Information

You can easily sort the grid by a patient characteristic, such as gender or location, to display the group of patients you need.

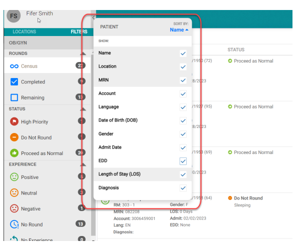
The list of options that display in the Sort By list is determined by the parameters selected in the Show setting. For example, if DOB is not currently shown in the patient information, it is not available as a sort parameter. Refer to Customizing the Patient Information Display on page 26 for details regarding the Show setting.

1. Click the **Sort/Show** icon in the patient grid.



The Sort/Show dialog displays.

2. Select **Sort By:** in the Sort/Show dialog.



The Sort By option list displays.

3. Select one parameter from the **Sort By** list to organize the grid by this parameter. For example, select LOS to display the patient list in order from the shortest to longest length of stay in the facility.

   By default, the Sort list will always include patient name, MRN, location, and LOS, as well as two columns in the grid; Status, and Past Rounds. Otherwise, you can sort by any of the characteristics chosen for display.

   The following table describes the parameters in the Sort list.

Sort By Label	Description
Name	The first name, middle initial, and last name of the patient.
Diagnosis	The reason the patient is admitted to the facility.
Location	The unit and bed where the patient is admitted.
LOS	The length of stay identifies the number of days and hours that the patient has been admitted.
MRN	The patient's medical record number.
DOB	The date of birth of the patient, in mm/dd/yyyy format, followed by the patient age.

Sort By Label	Description
Gender	The identified gender; M or F.
Account	The patient's account identifier.
Admit Date	The date the patient was admitted.
EDD	The patient's expected discharge date.
Language	The language spoken by the patient.
Past Rounds	Lists the last three rounds performed on the patient.
Status	Current experience reported by the patient on the last round performed.

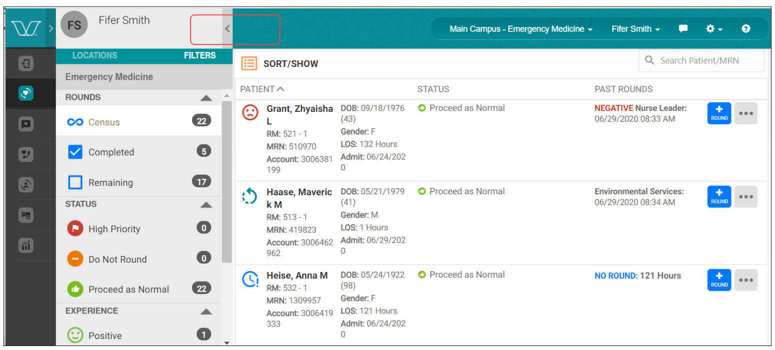
4. Click the **Sort/Show** icon to close the dialog.

Navigating Menus

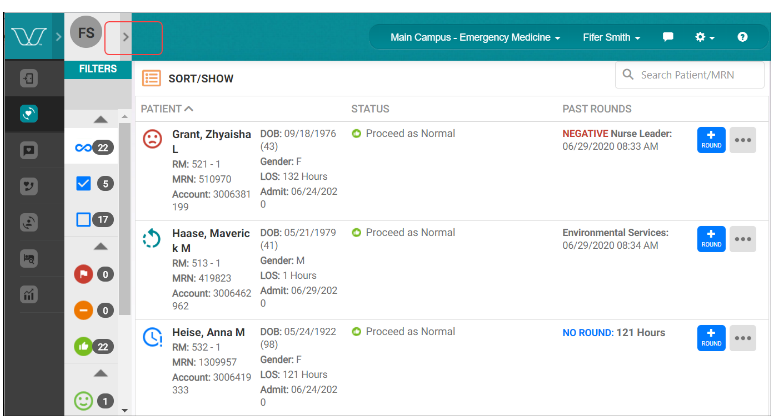
Expand or collapse the left navigation pane to manage the patient grid and menu view.

By default, the Care Rounds navigation menu is expanded. You can easily minimize the menu to increase the view of the patient grid in the main window.

Click the left arrow in the header where the user name is displayed.



The Care Rounds navigation menu is minimized to display the icon and count for each filtering section. The window containing the patient grid expands, providing greater visibility of rounding details.



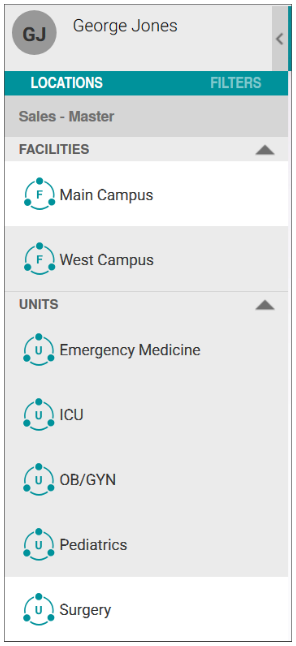
The arrow now points to the right. Click the arrow to access the menu's details, and the patient grid contracts again to allow the menu to expand.

Accessing Locations

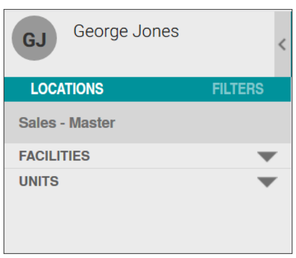
The navigation menu provides access to facility and unit locations, making it easy for you to work with patients in a specific unit or to quickly change locations.

The current location displays below the Locations tab.

1. Click the **Locations** tab in the navigation menu.



2. Select a facility in the menu to display the units associated with that facility. The grid updates with the patient list for the facility.
3. Select a unit, and the patient list for that unit displays in the grid.
4. Click the up/down arrow in the Facilities or Unit section to expand or contract the list of locations. Both the Facilities and Units sections are contracted in this example.

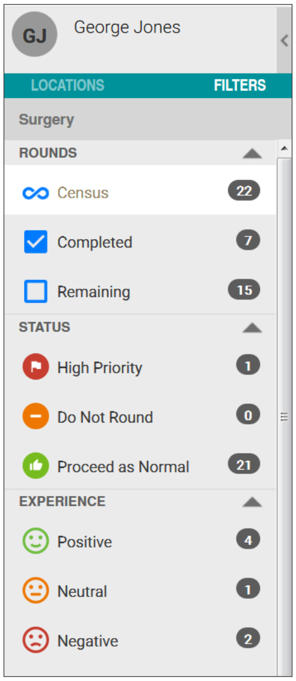


Next, select the patient you wish to work with in the grid.

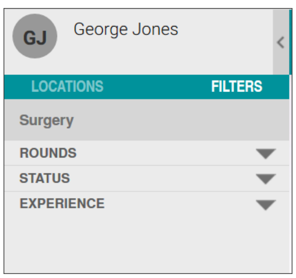
Accessing Filters

The navigation menu provides access to filtering categories that allow you to quickly identify patients by round completion, by round status, or by round experience.

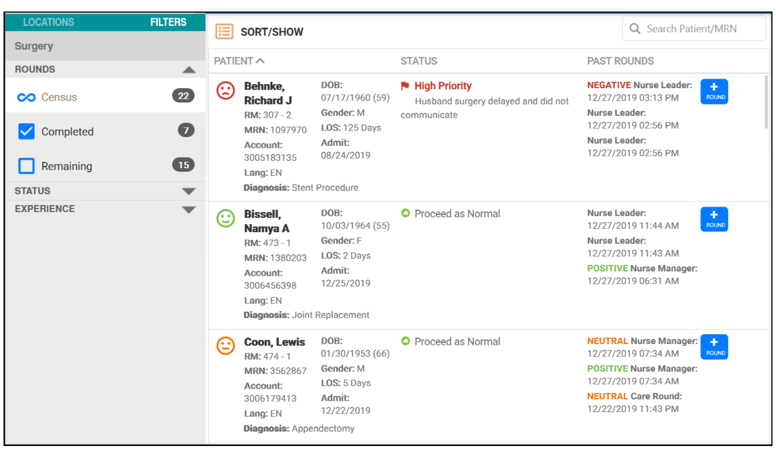
1. Select a facility and unit, if desired. See Accessing Locations on page 29 to understand the Locations tab.
2. Click the **Filters** tab in the navigation menu.



3. Click the up/down arrow in the Rounds, Status, or Experience sections to expand or contract the lists in the section. The three sections are contracted in this example.



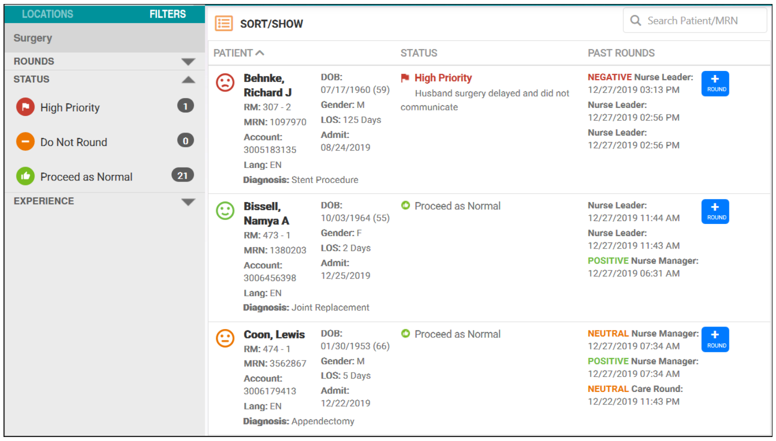
4. Select an option in the Rounds section; options are Census, Completed, Remaining. The patient grid updates to display the patients that meet the selected criteria.



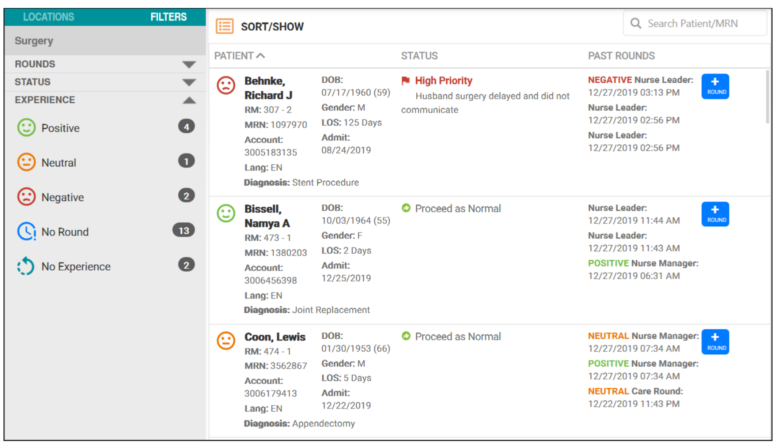
Rounds Filters	Description
Census	Click Census to display the full census list for the selected unit.
Completed	Click Completed to view only those patients with a completed round for the selected unit on that day.

Rounds Filters	Description
Remaining	Click Remaining to view all patients who have yet to have a completed round for the selected unit on that day.

5. Select an option in the Status section; High Priority, Do Not Round, Proceed As Normal. The patient grid updates to display the patients that meet the selected criteria.



6. Select an option in the Experience section; Positive, Neutral, Negative, No Round, No Experience. The patient grid updates to display the patients that meet the selected criteria.

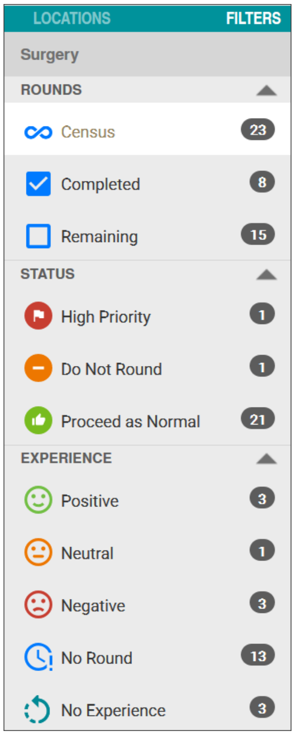


Next, select the patient you wish to work with in the grid.

Filtering the Patient List View

Using the navigation menu you can restrict the patient list to those patients with the round completion, round status, or round experience value that you want to work with.

By default in Care Rounds, the patient list displays all patients in the selected unit. In the left navigation menu, you can quickly access the visual guides and links to work with three filtering modes. With one click you can display the patients with your chosen value in Rounds, Status, or Experience.



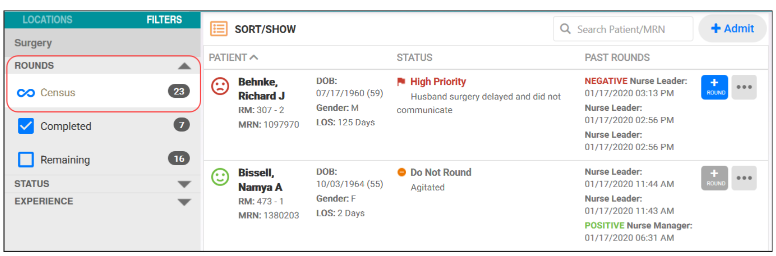
Filtering by Round

You can use the Round menu to display the full patient list, patients with a completed round, or patients who are eligible for a round.

By default, the full patient list is displayed for the selected location.

1. Navigate to the location you wish to survey.
2. Select an option in the Rounds menu. In this example, select Census and the complete patient list for the location displays.

   The number of patients is displayed next to the label. In this example, the census for this location is 23.

   The patient grid displays the list of patients that meet the criteria.
3. Use the following table to understand the Rounds options.

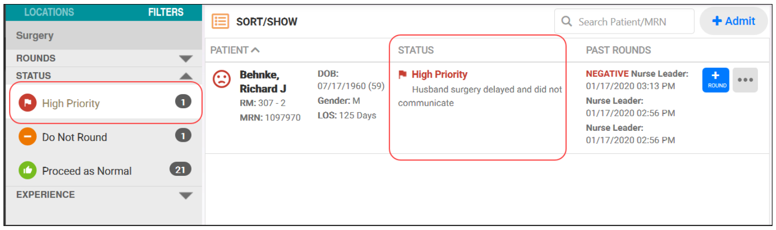
Rounds	Description
Census	Displays the full patient list for the selected location in the patient grid. The menu displays an infinity icon, and the patient count.
Completed	Displays the list of all patients with a completed round. The menu displays a checkmark in a checkbox in blue, and the patient count.
Remaining	Displays the list of all patients who are eligible for a round. The menu displays an open checkbox in blue, and the patient count.

Filtering by Round Status

You can use the Status menu to display a list of patients with the selected rounding priority.

Status values are manually assigned by facility staff. Refer to Changing a Round Status on page 42 for more information.

1. Navigate to the location you wish to survey.
2. Select an option in the Status menu. In this example, select High Priority rounding status.



The patient grid displays the list of patients that meet the criteria.

3. Use the following table to understand the round Status options.

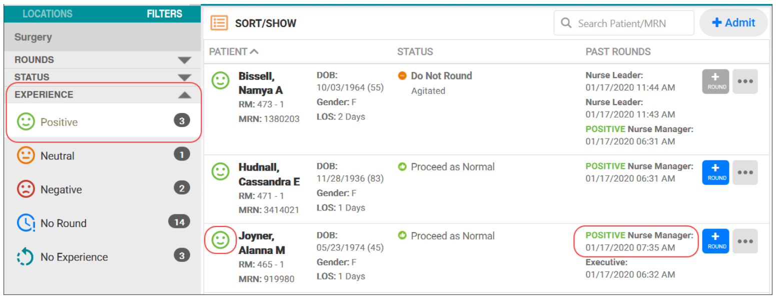
Round Status	Description
High Priority	Staff assigns this High Priority value to indicate that the patient should receive a rounding survey at the first opportunity. High Priority value can be assigned a predefined reason, or a unique reason can be added. The Status menu displays a red flag icon, and the patient count. The Round icon is blue, allowing a round to be initiated.
Do Not Round	Staff assigns this Do Not Round value to indicate that the patient should not receive a rounding survey. Do Not Round value can be assigned a predefined reason, or a unique reason can be added. The Status menu displays an orange access denied icon, and the patient count. The Round icon is gray and inactive to prevent accidental rounding.
Proceed as Normal	Staff assigns this Proceed as Normal value to indicate that the patient may receive a rounding survey. The Status menu displays a green thumbs up icon, and the patient count. The Round icon is blue, allowing a round to be initiated.

Filtering by Round Experience

You can use the Experience menu to display a list of currently-admitted patients with the selected rounding experience.

Experience values are derived from the most recent round performed with the patient. Refer to Using Rounding Surveys on page 35 for details.

1. Navigate to the location you wish to survey.
2. Select an option in the Experience menu. In this example, select the Positive rounding experience.



The patient grid displays the list of current patients that meet the criteria.

3. Use the following table to understand the round Experience options.

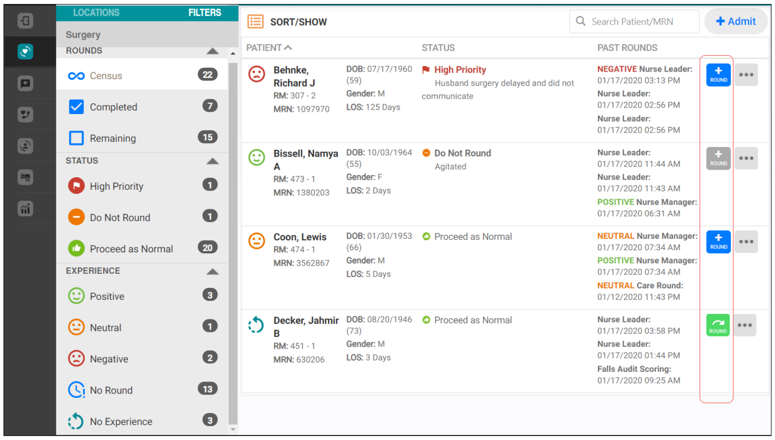
Round Experience	Description
Positive	The latest round resulted in the patient reporting a positive experience. The Experience menu displays green text, a smiling face emoticon, and the patient count.
Neutral	The latest round resulted in the patient reporting a neutral experience. The Experience menu displays orange text, a plain face emoticon, and the patient count.
Negative	The latest round resulted in the patient reporting a negative experience. The Experience menu displays red text, a frowning face emoticon, and the patient count.
No Round	A round survey has not been performed with this patient. The Experience menu displays blue text, a clock face with an exclamation mark emoticon, and the patient count.
No Experience	The latest round resulted in the patient reporting that the subject raised in the survey did not apply to them. For example, if the patient had not received a meal yet, then a dietary question would not apply. The Experience menu displays teal text, a broken circle emoticon, and the patient count.

Using Rounding Surveys

Rounding surveys are questionaires designed to efficiently identify and solve patient or family concerns, recognize staff members for excellence, and capture patient comments to inform system-level improvement efforts.

An icon provides an easily visible way to quickly assess a patients availability for rounding, as well as access to the rounds list. The rounding icon appears in a column on the right side of the patient grid. The color of the icon indicates if a round can be initiated.

When the icon is clicked, the New Round menu displays; select a round type to initiate the round for the patient. For details, refer to Starting a New Round on page 37.



The information in this table describes the behaviour of each color icon in the patient grid.

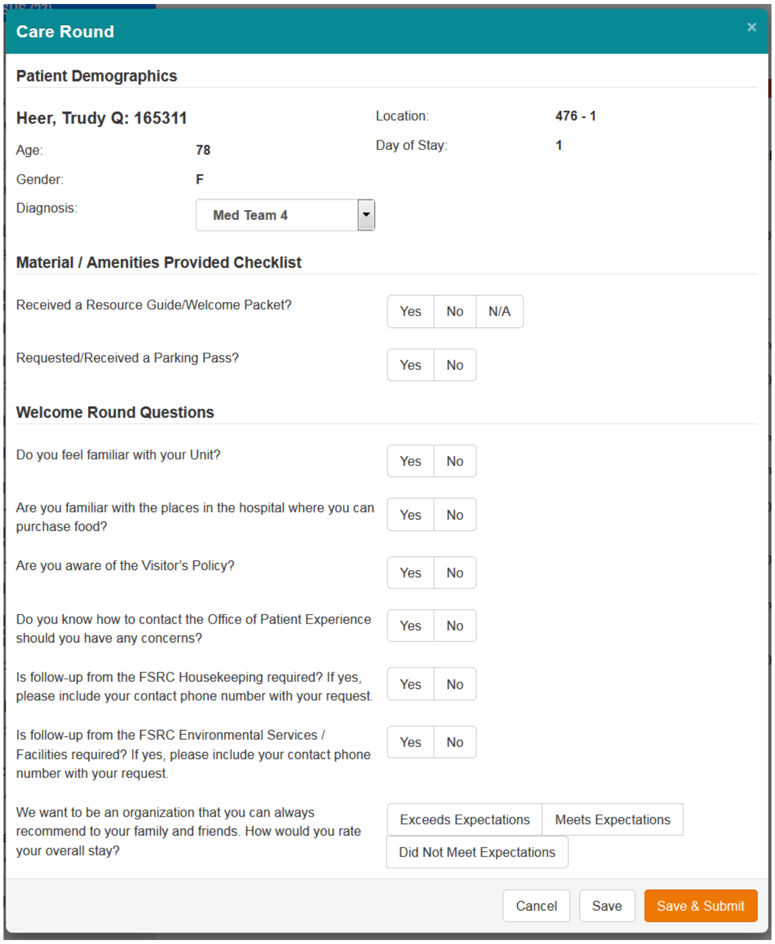
Rounds	Description
Blue	Indicates the patient can be rounded on. Blue may display when the patient Status is High Priority or Proceed as Normal.
Green	Indicates a round has been initiated and saved, but not submitted. Green may display when the patient Status is High Priority or Proceed as Normal.
Gray	Indicates the patient cannot be rounded on, and the icon is inactive. Gray displays when the patient Status is Do Not Round.

Viewing a Care Round Survey

Surveys are predefined questions which are designed for a business purpose.

Your facility determines the surveys that will be provided. Staff members can be permitted access to the surveys they need to complete their responsilbilites associated with their role.

The following survey is an example of a Welcome round that staff in your facility would use to evaluate the facility performance in orienting a new patient upon their admission to the facility.



The Patient Demographics section contatins the information about the patient and their admission. This information is typically name, medical record number, age, gender, location. Refer to Viewing the Patient List on page 24 for details.

The remaining sections in the survey will be specific to the type of round survey. Questions may be answered with a checkbox, a text field, or other options such as Yes or No. A question may configured to require an answer, and additionally, an answer may be configured to require a comment in an accompanying text field.

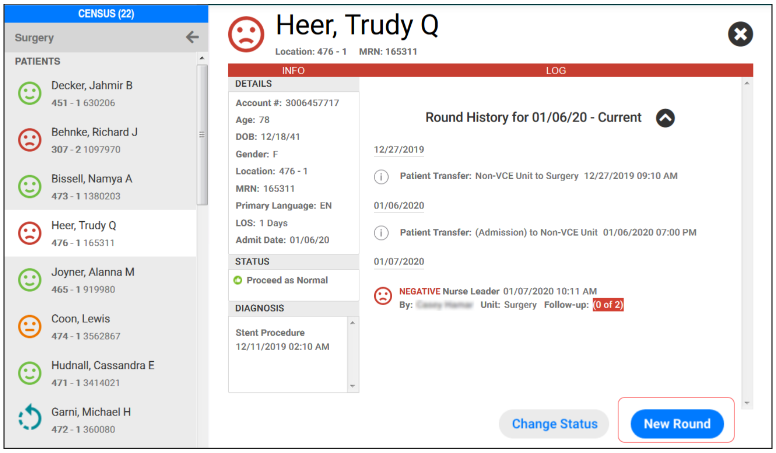
A question is often provided at the bottom of the survey to allow the system to assign an overall experience to the patient visit. For example, in this Welcome survey the final question asks, "How would you rate your overall stay?" The response options are Exceeds Expectations, Meets Expectations, and Did Not Meet Expectations. These answers correspond to an Experience rating of Positive, Neutral, and Negative, respectively. Refer to Filtering by Round Experience on page 34 for more information.

Starting a New Round

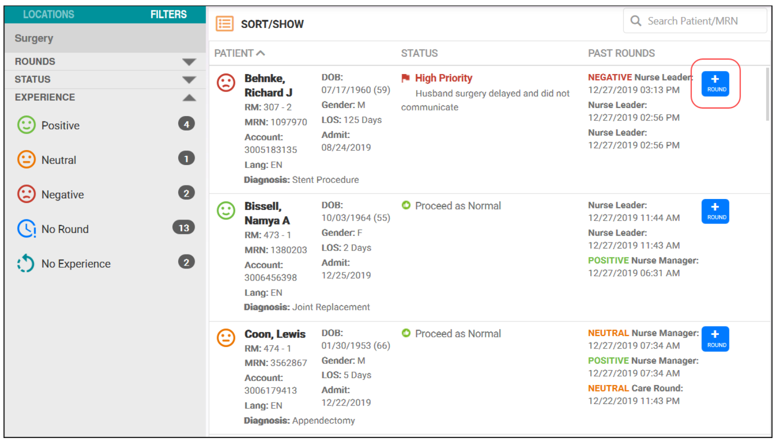
Access the list of configured surveys for your company, and complete the questions for the selected patient.

First display the list of preconfigured surveys, then select the survey you want, complete the questions, and finally submit the form.

1. Display the **New Round** list of surveys in either of the following ways.
   a. In a patient's Details, select **New Round**.

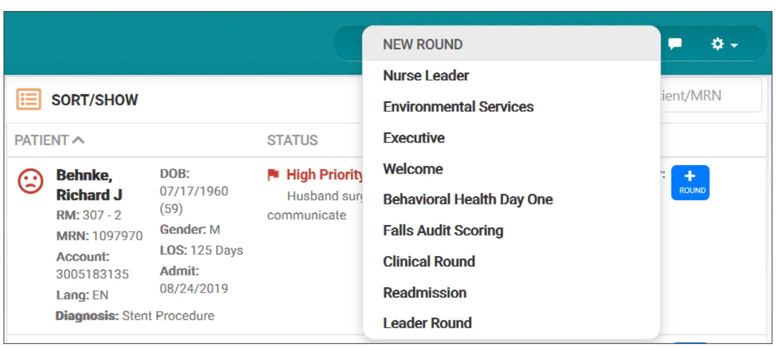


b. In the patient grid, select **Round**.



2. Select the round in the **New Round** list that you wish to assign for the patient. In this example select the Welcome round.

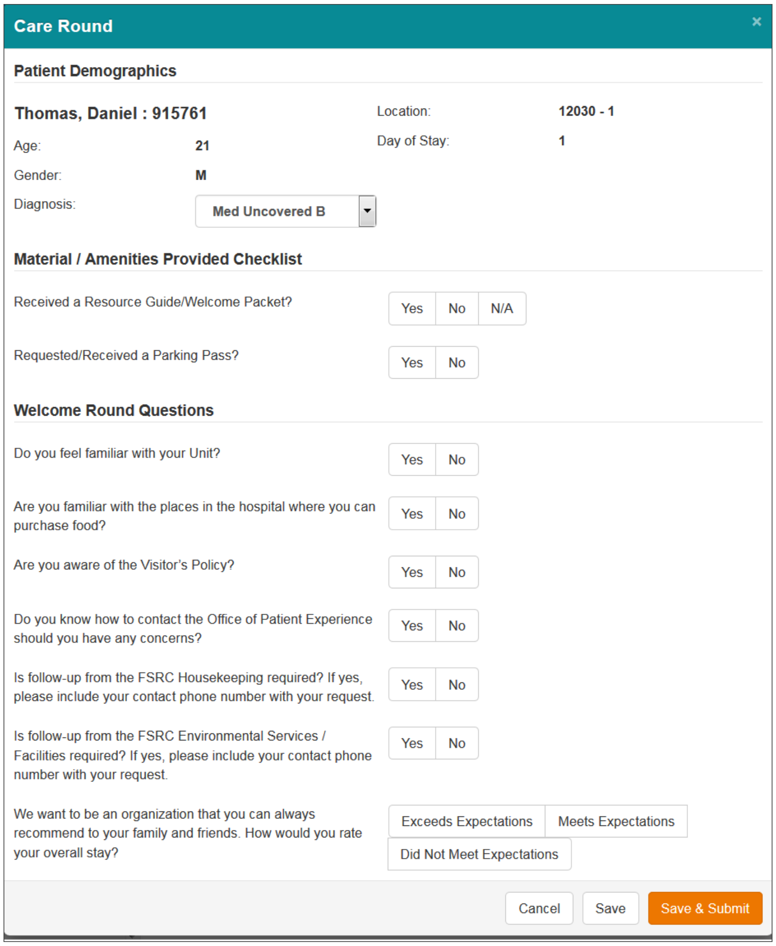
   The list of available New Rounds is defined by the customer. See your Client Services Manager for assistance with the list of rounds provided.



   The round survey form displays.

3. Complete the questions in the survey with the patient. Each survey form contains questions designed for the specific round's intention.

   Patient information is displayed in the Patient Demographics section. Refer to Customizing the Patient Information Display on page 26 for more information about the patient details provided.



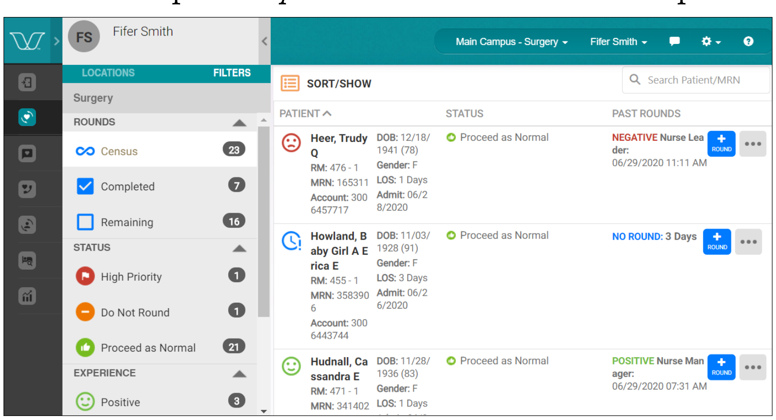
4. Select one of the following to exit the round form:
   - **Cancel**: Close the round form without saving any changes.
   - **Save**: Close the round form and preserve the entries without submitting the form to the system.
   - **Save & Submit**: Close the form and submit it to the system; no additional changes can be made.

Viewing a Patient's Round History

You can view rounding history, change the round status, and start a new round for the selected patient.

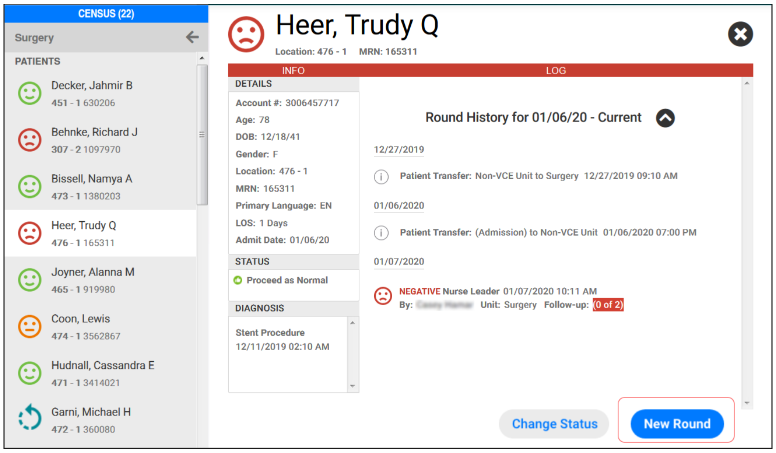
The left navigation menu automatically displays the **Census** view. All patients assigned to the current location are listed in the Census view.

1. Click on the patient you wish to work with in the patient grid.

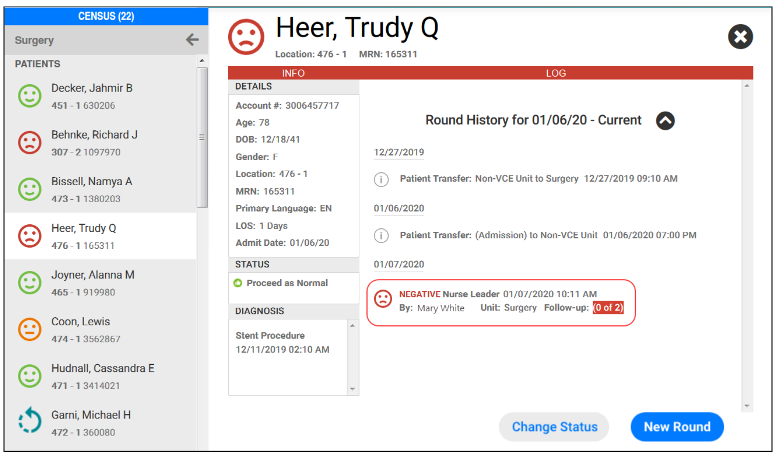


The patient details appear.

2. Review the patient details.

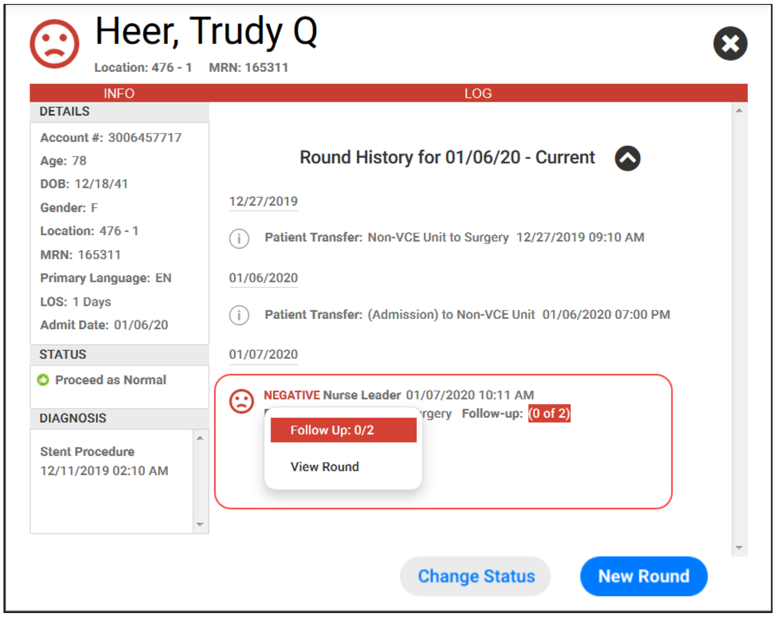


3. View the **Log** section to view the round history for the selected patient. This log contains the admission and transfer information by date in descending order.
4. Click a round link for the chosen date in the log.



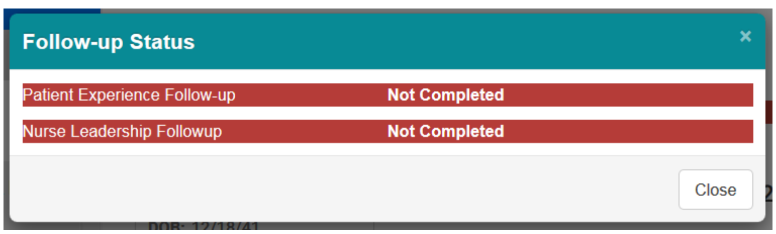
A popup window displays.

5. Select an option in the popup window.



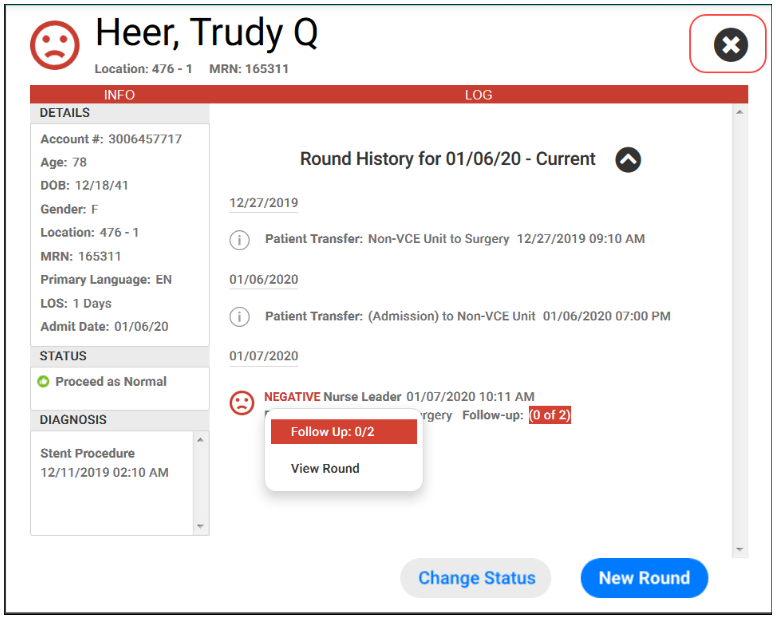
Click on the page outside the popup window to close the popup dialog.

6. Click **Follow Up** if displayed in the popup dialog, and review the information presented in the **Follow-Up Status** window. This information is available when the patient has follow-up assignments that are not complete.



Click **Close** or the **X** icon to close the dialog.

7. Click **View Round** if displayed in the popup dialog, and review the round presented. This option will display the completed round for the patient, location, date, and rounder. Refer to Viewing a Care Round Survey on page 36 for more information.
8. Select **Change Status** to access the dialog where you can assign a new status for this patient. Refer to Changing a Round Status on page 42 for more information.
9. Select **New Round** to display the list of available rounds where you can select a new round for this patient. Refer to Starting a New Round on page 37 for more information.
10. Select the **X** icon in the upper right corner to close the dialog.



The patient grid displays.

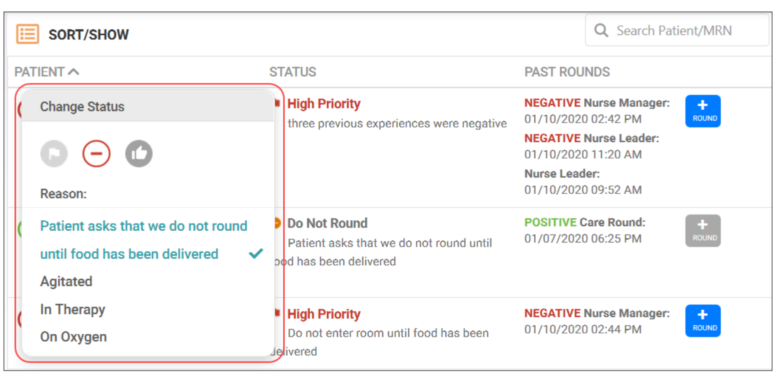
Changing a Round Status

You can change a patient's current rounding status (High Priority, Proceed as Normal, and Do Not Round) from the patient grid.

Pre-defined reasons for changing a patient status are provided. Contact your Client Services Manager for assistance with the provided list. Otherwise, you can use the Other option to define a new reason for a patient status change.

1. Display the **Change Status** dialog in either of the following ways.
   a. In the **Status** column, click on the status for the patient you wish to change.
   b. In the patient's round history, select **Change Status**. Refer to Viewing a Patient's Round History on page 39 for more information.

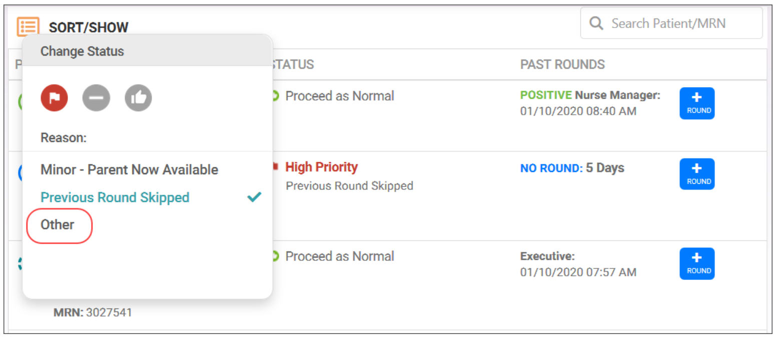
   The **Change Status** popup dialog appears.
2. Edit the **Change Status** dialog.



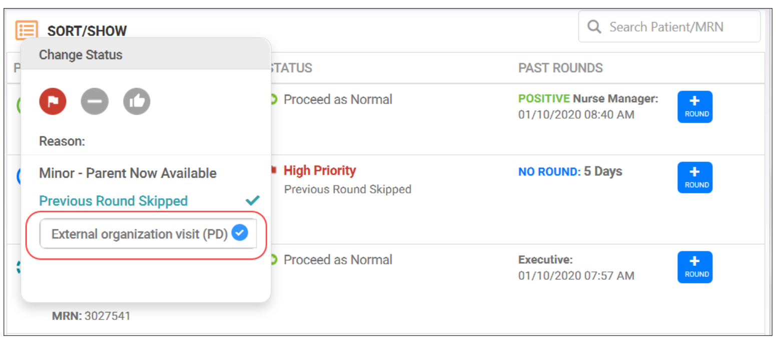
Configuration Item	Description
Status	Click an option to change the status of the round for this patient. Default options are **High Priority**, **Proceed as Normal**, and **Do Not Round**.

Configuration Item	Description
Reason	Click a pre-defined option in the **Reason** list. Reason options are provided when the Status is **High Priority** or **Do Not Round**. Reason options are defined by the customer. Contact your Client Services Manager for assistance with the reasons presented. In addition to the defined list, you can create a unique reason for the patient by selecting the **Other** reason option.

3. Click the reason for the round status change in the Reason list.
   The patient round status is updated. A success banner displays at the bottom of the window.
4. Click a default reason for the round status change, or click **Other** in the Reason list to add a unique explanation for a patient's change in status.

   A free-text field displays.
5. Enter the new reason in the text field and click the checkmark.

   The patient's round status is updated. A success banner displays at the bottom of the window.

Advanced Functionality

These functions may be limited as not all users will see the functionality described here.

Managing VCE Users

A user is a person who has been authorized to access the VCE product. A unique account is created for each user which defines the features in the VCE app that they may access.

You may be authorized to manage your staff's access to the roles and facilities you wish them to use in performing their responsibilities. If you have the appropriate authorization, you can edit a user's role permissions, provide users access to the facilities and units they can work with, and delete users who no longer require access to VCE.

Roles are defined in VCE to allow users access to the functionality necessary to perform their jobs. A defined role is associated with the rounding functionality needed, such as a clinical or environmental rounding survey. For example, a user may be assigned a clinical role which provides access to the rounding surveys they need for patient care. Users can be authorized to access all locations (hospital, campus, care unit) or to a subsection of locations where they may have responsibilities.

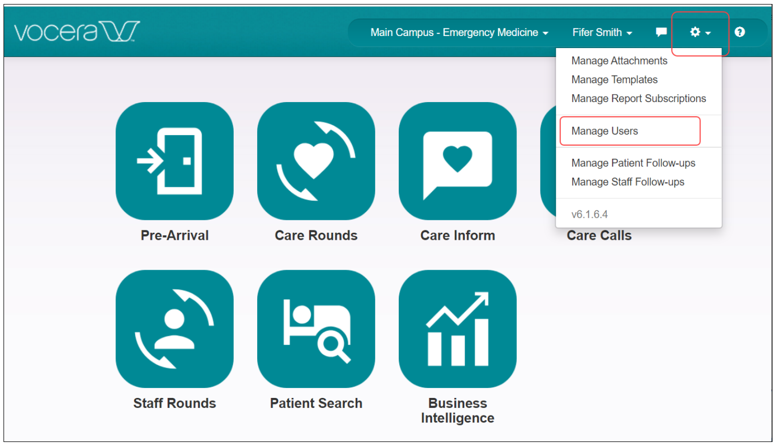
Customers often choose Active Directory (AD) to manage user authentication and authorization in Vocera. If desired, a customer can employ the Managing Users functionality to manually create users in VCE, instead of using AD to populate the VCE user data.

Accessing the Manage Users Functionality

Navigate to Manage Users in VCE to work with your user accounts.

The modules displayed in VCE depend on your access authorization. Please contact your Supervisor or a VCE Client Services Manager for assistance if needed.

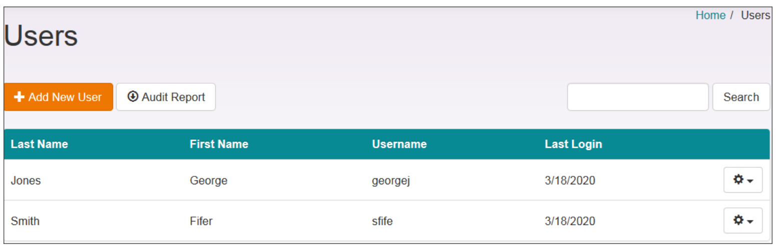
1. Select the gear icon in the VCE toolbar. Refer to Using Management Tools on page 18 for more information.
   A drop down menu displays.
2. Select **Manage Users** in the menu.



The Users window displays.

3. View the list of users displayed in the Users window.

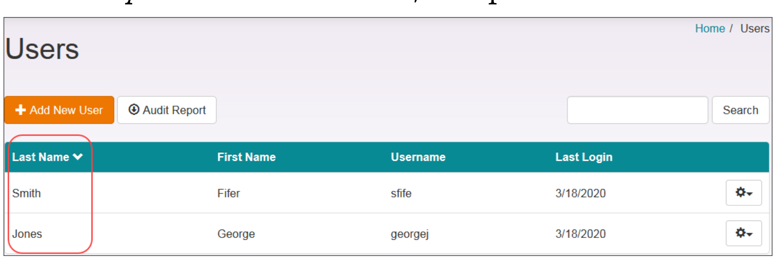
   In this window you can search for a user, add a new user, or generate an audit report.



4. Use the following table to understand the information displayed in the columns in the Manage Users grid.

Setting	Description
Last Name	Displays the last name of the VCE account user.
First Name	Displays the first name of the VCE account user.
Username	Displays the username of the VCE account user.
Last Login	Displays the date when the account user most recently logged into the VCE system.
Gear Icon	Use the functionality provided in this icon to edit or delete the selected user, change the user's VCE password, or generate an audit report.

5. Click a column label to sort the grid by that column. For example, click the Last Name column to sort the list by the user's last name, in alphabetical order.



   An up/down arrow appears in the column label. You can toggle between ascending and descending alphabetical order by clicking the arrow.

6. Enter a character in the search field and press **Search** to return the list of users that you want to work with.

Search is performed on the user's first, name, last name, and username. Enter at least one letter to initiate the search. A numerical search is not supported.

Delete the term in the field and click Search again to display the complete user list.

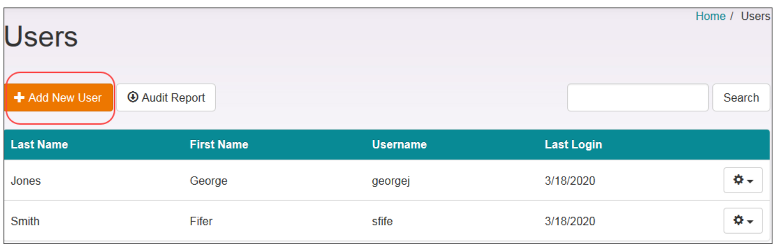
Adding a New User

When creating a new user in VCE, assign the functional roles required for them to complete their tasks and allow them access to facilities and units where they will perform their responsibilities.

The steps on this page describe how to manually create a new account for a user in VCE.

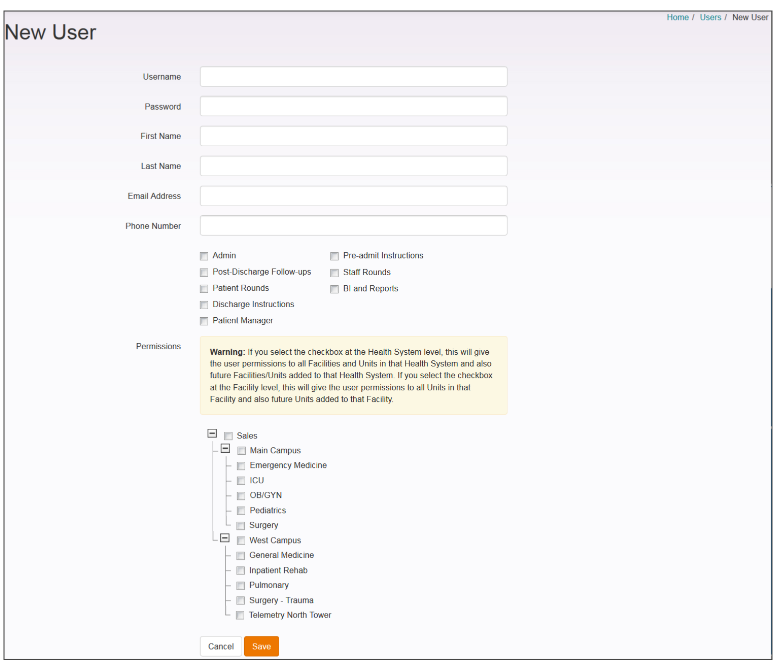
Note: If your facility uses Active Directory, this function is managed internally by your IS department. Follow your facility's process for adding new users to Active Directory.

1. Select **Add New User** in the Users window.



The New User dialog displays.

2. Complete the **New User** form in the window.



3. Use the following table to complete the fields displayed in the New User form.

Setting	Description
Username	Enter the username for the new account user. This field is required.
Password	Enter a password for the new account user. This field is required.
First Name	Enter the first name of the new account user. This field is required.
Last Name	Enter the last name of the new account user. This field is required.
Email Address	Enter the email address of the new account user. This field is optional.
Phone Number	Enter the phone number for the new account user. This field is optional.
Roles	Select at least one role for the new user. The roles displayed depend upon the user's authorized access to the system. At least one user role is required. Refer to the next table for a description of each user role.
Permissions	Select the locations the user is authorized to access. At least one location is required for the new user.

Use the information in this table to understand the user roles to select from in the New User page.

User Role	Description
Admin	This role allows the user administrative capability within VCE.
Post-Discharge Follow-ups	This role allows the user access to the Care Calls module.
Patient Rounds	This role allows the user access to the Care Rounds module.
Discharge Instructions	This role allows the user access to the Care Inform module.
Patient Manager	This role allows a customer that does not use an HL7 interface to populate the census. They can manually admit, discharge, and transfer patients in and out of VCE.
Pre-Admit Instructions	This role allows the user access to the Pre-Arrival module.
Staff Rounds	This role allows the user access to the Staff Rounds module.
BI and Reports	This role allows the user access to the Business Intelligence module.

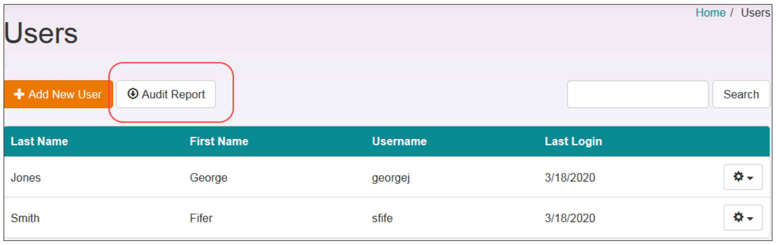
4. Select one of the following to exit the New User form.
   - **Cancel**: Return to the Users page without adding a user to the system.
   - **Save**: Create the new VCE user in the system.

Generating an Audit Report of User Activity

The Audit Report displays log in, log out, and rounds submitted activity for the staff accounts you manage within VCE.

First, you will select the timeframe to display in the CSV report on your users' activity.

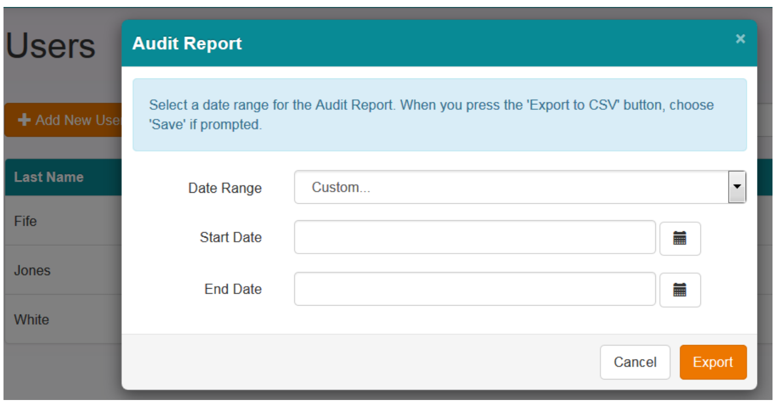
1. Select **Audit Report** in the Users menu.

   The Audit Report dialog displays.

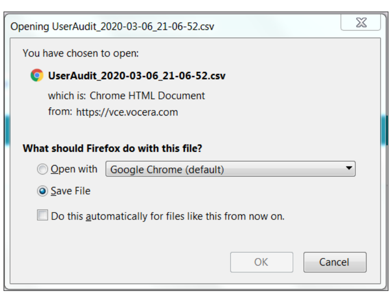
2. Select a date range in the drop down menu.

   Date Range options are Today, Yesterday, Last 3 Days, Last 7 Days, Last 14 Days, Custom. In the Custom selection, specify the Start Data and End Date for the range of interest.

   - **Cancel**: Close the Audit Report dialog without submitting the report request.
   - **Export**: The user audit report for the requested date(s) is generated as a CSV file.

3. Select an option to open or save the UserAudit CSV file.

   - **Cancel**: Close the open or save dialog without saving or opening the generated file.
   - **OK**: Open the generated file, or save the file to the default Download folder on your system and open it from there.

4. If you saved the file, navigate to the downloads folder on your device and open the export file.

	A	B	C	D	E
1	User Audit				
2	Showing data for 03/18/2020 to 03/18/2020				
3					
4	User	UnitName	Date	Description	
5	Fifer Smith		03/18/20	Login	
6	George Jones		03/18/20	Logout	
7	George Jones		03/18/20	Login	
8	Fifer Smith		03/18/20	Logout	
9	Fifer Smith		03/18/20	Login	
10	Fifer Smith		03/18/20	Logout	
11	Fifer Smith		03/18/20	Login	
12	Fifer Smith		03/18/20	Logout	
13	Fifer Smith		03/18/20	Login	

The User Audit report displays.

5. Use the following table to understand the fields displayed in the User Audit report.

   The information reported in a user audit include the name of the staff, the unit, date of the activity, and the audit event.

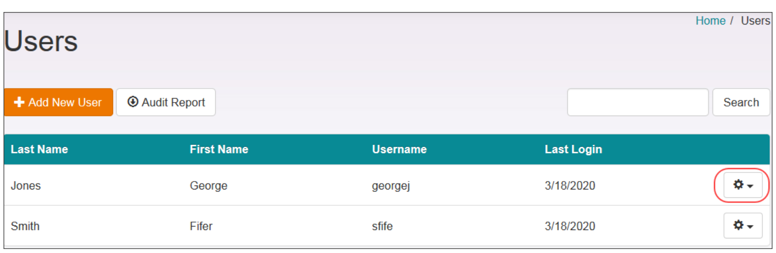
Setting	Description
User	Displays the audited user's name; first and last.
Unit Name	Displays the name of the unit where the user was assigned on the audit date.
Date	Displays the date on which the login, logout, or round was reported.
Description	Describes the audit event logged on the audit date for the identified user name. Audit events reported on are: • Login • Logout • Round submitted

Using the Options Menu

The Options Menu provides access to user account maintenance tasks, allowing you to manage the staff that you are responsible for in VCE.

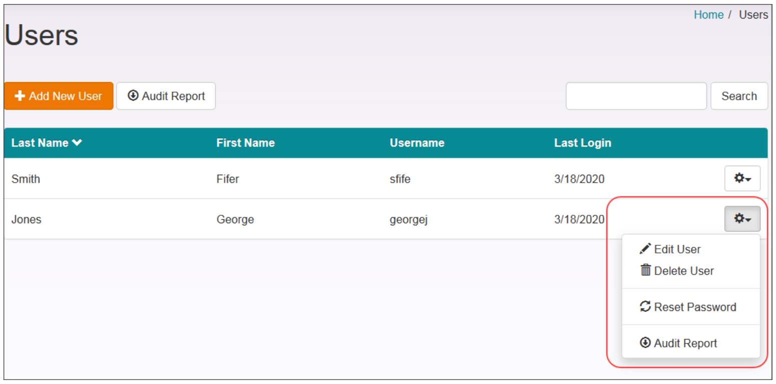
Navigate the menu described here to edit or delete a user, or reset a user's password. You can also generate an audit report on the login, logout, and round submission activity for your users.

1. Select the Options menu (gear icon) in the Users grid for the user you want to work with.



   The Options menu displays.

2. Select an option in the menu.



The selected functionality displays.

Next you can edit or delete a user, change a user's password, or create an audit report.

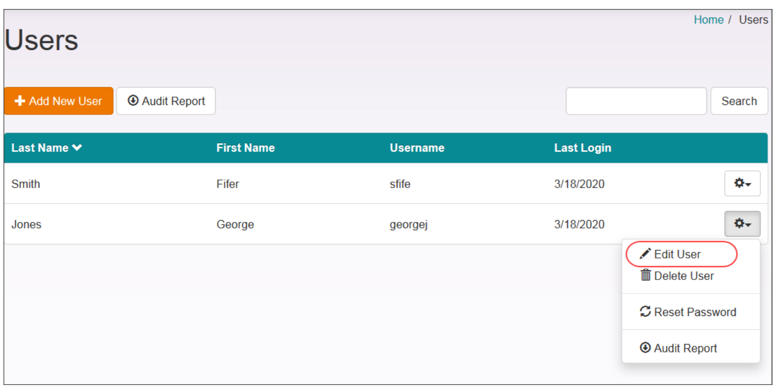
Editing a User

Revise the user account selected in the Users grid to change the user's information or to assign different roles or locations.

You can edit a user account to change how the user's name is displayed in VCE. For example, if you prefer to be called by your middle name instead of your first name, you can change that information in the Edit User dialog.

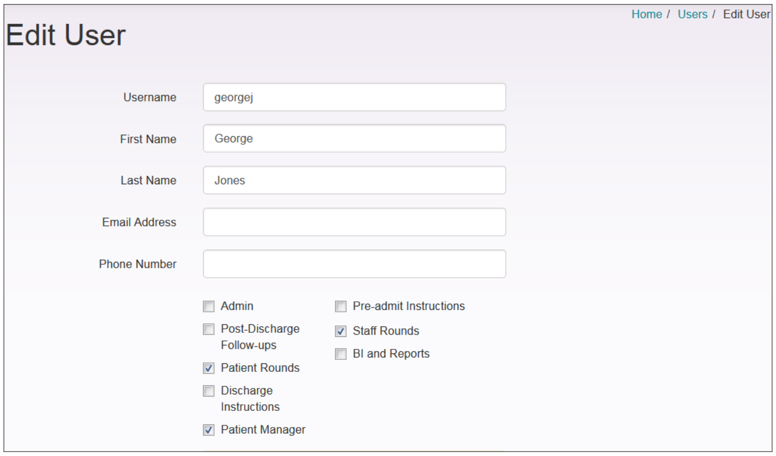
Note: If your facility uses Active Directory for authentication, the "Username" field cannot be revised; the account's username is managed by Active Directory.

1. Select **Edit User** in the Options menu.



The Edit User dialog displays.

2. Complete the Edit User fields as needed. Refer to Adding a New User on page 46 for details.



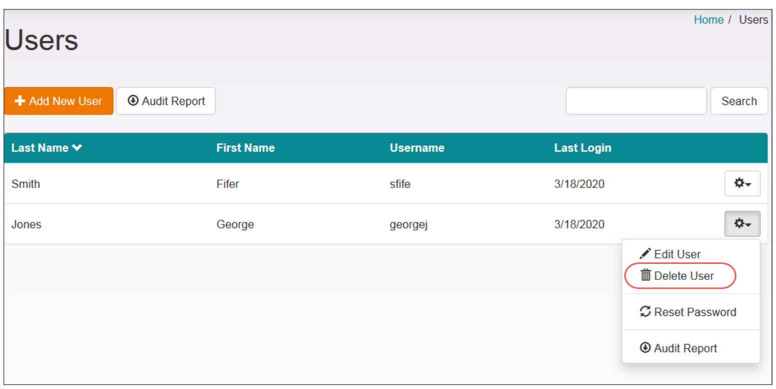
Deleting a User

Quickly delete a manually created user from the system.

A user created by Active Directory can be removed from the VCE user list with these steps. However, their credentials remain active unless they are also removed from the Active Directory security group – a process managed internally by the facility IS department.

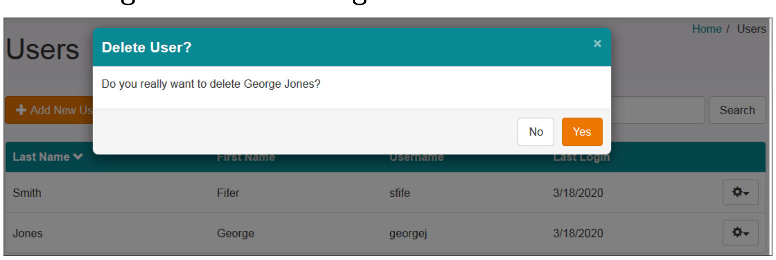
Note: If your facility uses Active Directory, this function is managed internally by your IS department. Follow your facility's process for removing users from Active Directory.

1. Select **Delete User** in the Options menu.



The Delete User dialog displays.

2. Select **Yes** in the Delete User? dialog to delete the user from the system. Otherwise, select No to close the dialog without deleting the user.



The User is automatically and immediately removed from the Users grid.

Resetting a Password

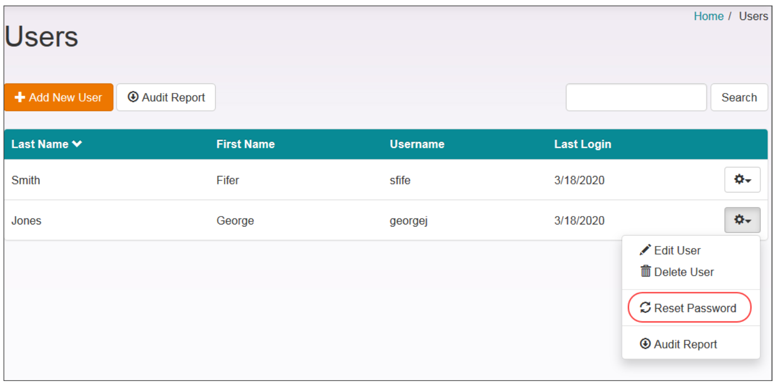
You can create a temporary password for the selected user, which the user will be required to change when they next log into VCE.

The steps on this page describe how to reset a password for an account that has been created manually in VCE.

Note: If your facility uses Active Directory, this function is managed internally by your IS department. Follow your facility's process for resetting passwords in Active Directory.

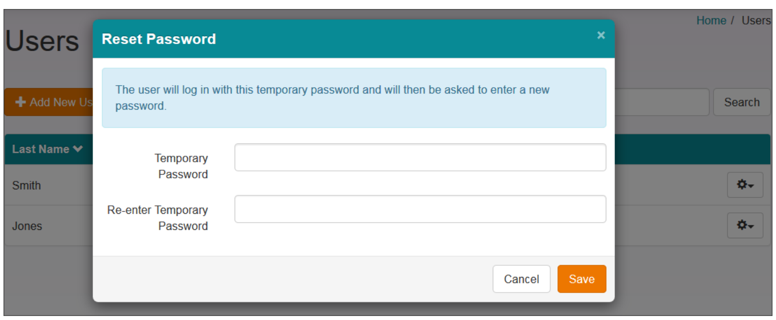
1. Select **Reset Password** in the Options menu.

   Enter a temporary password using these steps. Upon login, the user will be required to create a new, permanent password.



   The Reset Password dialog displays.

2. Enter the temporary password in the **Reset Password** fields.



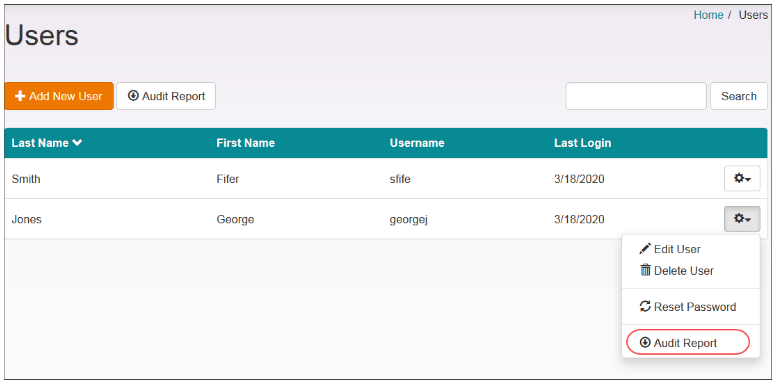
   Select one of the following to exit the Reset Password dialog.

   - **Cancel**: Close the dialog without changing the user account password.
   - **Save**: Save the temporary pasword to the system.

Create an Audit Report

This option accesses the same functionality as the Audit Report link on the Users page.

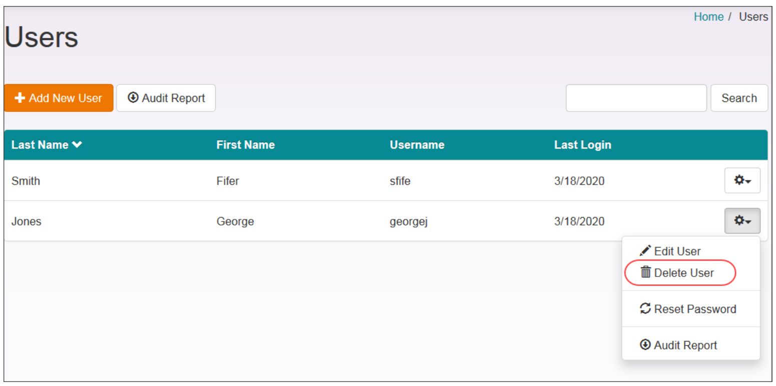
1. Select **Audit Report** in the Options menu.



The Audit Report dialog displays.

2. Select a date range in the **Audit Report** dialog.

   Refer to Generating an Audit Report of User Activity on page 48 for Audit Report details.



This Audit Report functionality is the same whether accessed from this Options menu, or from the Users page toolbar.

Working with Round Follow-ups

Round follow-up communication allows a rounder to use the survey to report a patient issue, and initiate communication that is tracked until the situation is resolved.

Your facility can easily capture patient requests and immediately send request notifications to the right care team members at the right time. The closed-loop system allows monitoring of request-fulfillment status. Request records are retained in the patient file to support follow-up at the next interaction.

Round surveys can be designed to include questions that trigger a follow-up event. A designated department or VCE user is automatically notified of the follow-up request. The notification can be escalated or resent if needed. Once the recipient has addressed the issue that triggered the follow-up notification, they can close the follow-up event.

The follow-up request and any escalations can be accessed in Managing Patient Followups. To view the round survey that triggered the follow-up request, navigate to the patient history in Care Rounds. Refer to Viewing a Patient's Round History on page 39 for instruction.

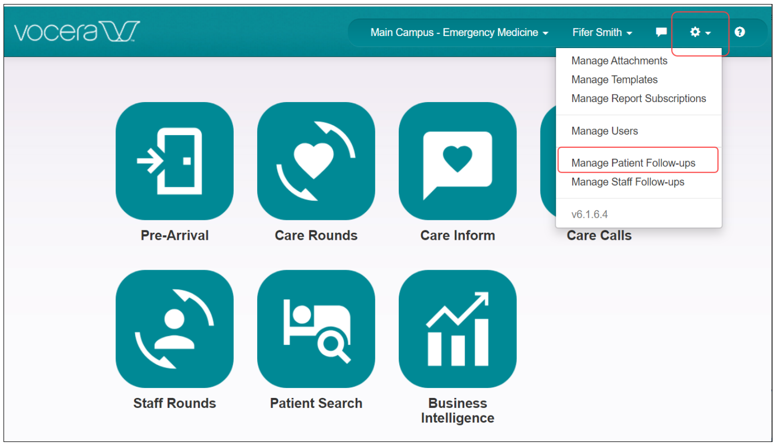
The Business Intelligence (BI) module provides access to the Care Rounds dashboard where the follow-up events are compiled into a data display. With authorization to access the BI module, you can view the tables displaying follow-up types and trends in the dashboard. You also have the ability to set parameters to look at selected data, such as a chosen date range, facility unit, or round type, for example.

Accessing Patient Follow-Up Requests

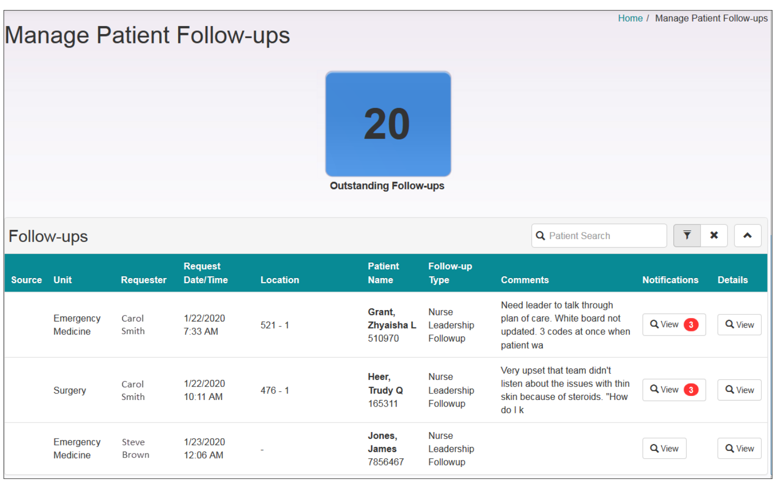
You can access a list of patients who have a current follow-up request, and view a notification history or close a request.

The displayed patient list depends on your access authorization. Please contact your Supervisor, or VCE Client Services Manager, for assistance if needed.

1. Select the gear icon in the VCE toolbar. Refer to Using Management Tools on page 18 for more information.
   A drop down menu displays.
2. Select **Manage Patient Follow-ups** in the menu.



   The Manage Patient Follow-ups window displays.
3. View the list of admitted patients who have an active follow-up request.
   The dashboard displays the number of current follow-up requests. You can search for a patient, filter for a subset of outstanding follow-up requests, or click the up/down arrow to show or hide the follow-ups list.

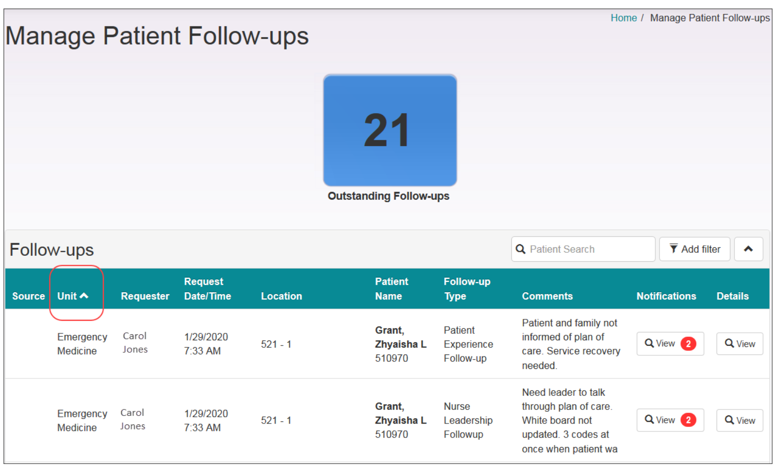


4. Use the following table to understand the information displayed in the columns in the Manage Patient Follow-ups grid.

Setting	Description
Source	Displays the VCE module where the follow-up request originated.
Unit	Displays the unit where the patient is admitted.

Setting	Description
Requester	Displays the name of the staff who requested a follow-up.
Request Date/Time	Displays the date and time when the follow-up request was made.
Location	Displays the facility information where the patient is admitted, as unit and bed.
Patient Name	Displays the patient name and medical record number.
Follow-up Type	Displays the type of follow-up request that was made, such as Environmental, or Clinical.
Comments	Displays any comment or instruction the requester noted in the follow-up request.
Notifications	Displays a list of the notifications and escalations for the follow-up request.
Details	Displays the Follow-up Details dialog. The requester can be edited, and the follow-up can be resolved from this dialog.

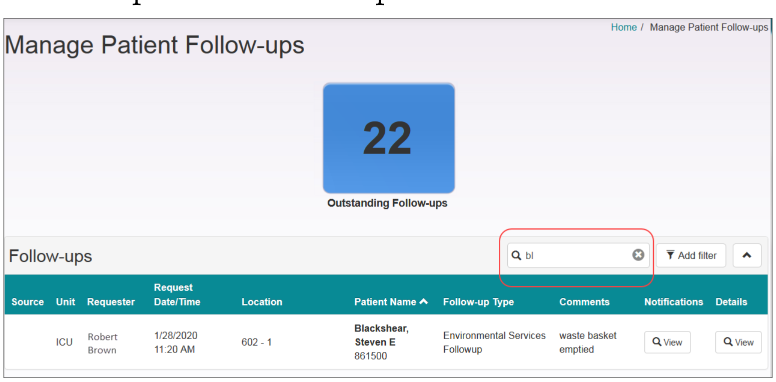
5. Click a column label to sort the grid by that column. For example, click the Unit column to sort the patient list by the unit name, in alphabetical order.



An up/down arrow appears in the Unit column label. You can toggle between ascending and descending alphabetical order by clicking the arrow.

6. Enter a term in the search field and press **Enter** on the keyboard to return the list of patients with follow-up requests that you want to work with.

   Search is performed on the patient's first and last name. Enter at least one letter to initiate the search.



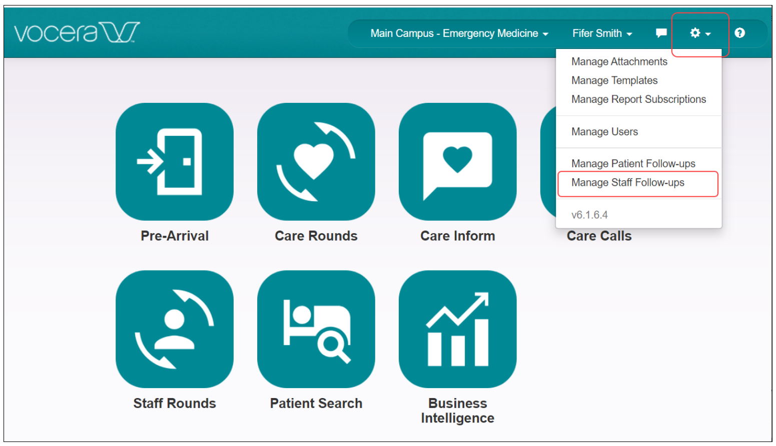
Click the **X** in the search field to remove the search, and display the complete patient list.

Accessing Staff Follow-up Requests

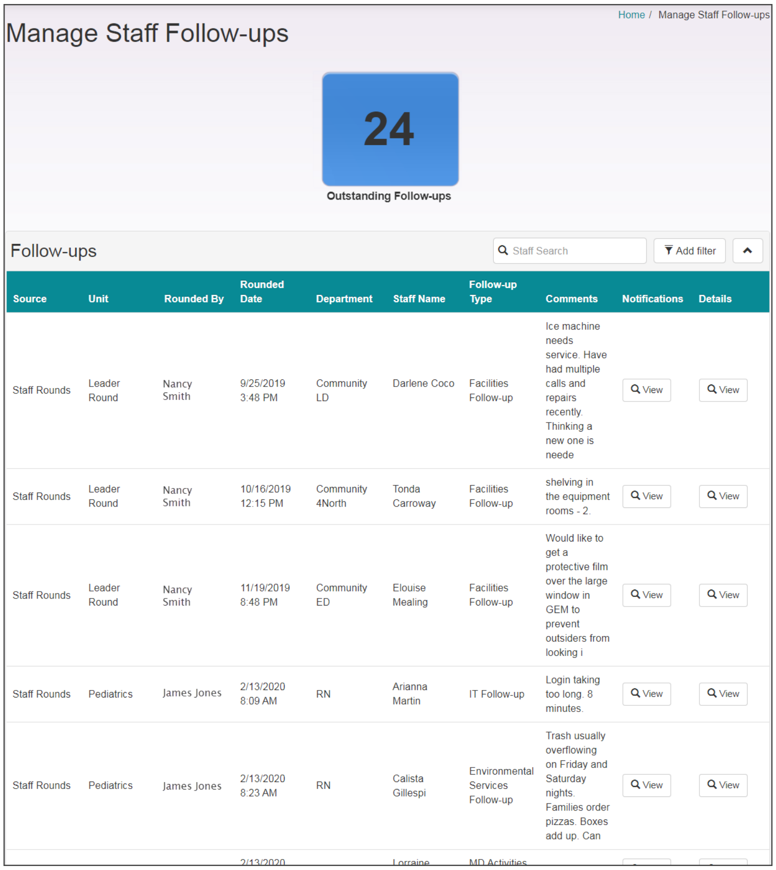
You can access a list of staff who have a current follow-up request, and view a notification history or close a request.

The displayed staff list depends on your access authorization. Please contact your Supervisor, or VCE Client Services Manager, for assistance if needed.

1. Select the gear icon in the VCE toolbar. Refer to Using Management Tools on page 18 for more information.
   A drop down menu displays.
2. Select **Manage Staff Follow-ups** in the menu.

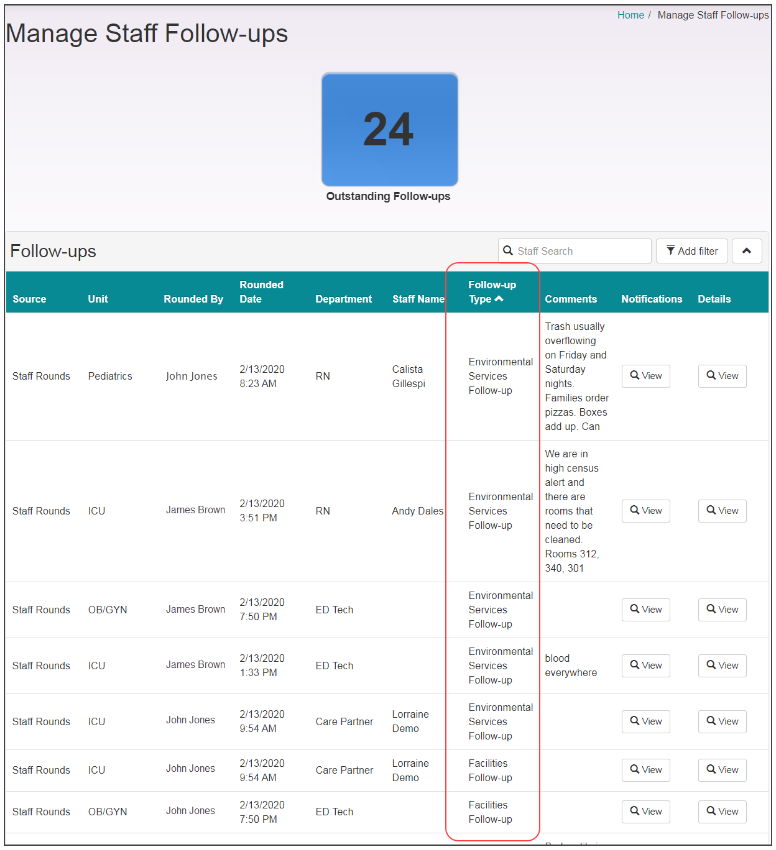
   The Manage Staff Follow-ups window displays.
3. View the list of staff who have an active follow-up request.
   The dashboard displays the number of current follow-up requests. You can search for a staff, filter for a subset of outstanding follow-up requests, or click the up/down arrow to show or hide the follow-ups list.



4. Use the following table to understand the information displayed in the columns in the Manage Staff Follow-ups grid.

Setting	Description
Source	Displays the VCE module where the follow-up request originated.
Unit	Displays the unit where the patient is admitted.
Rounded By	Displays the name of the staff who performed the round.
Rounded Date	Displays the date and time when the round was performed.
Department	Displays the location where the round was performed. The Department value is determined by the customer at the time of implementation, and may represent the facility, unit, role, or department name.
Staff Name	Displays the first and last name of the staff who received the round.
Follow-up Type	Displays the type of follow-up request that was made, such as Environmental, or Clinical.
Comments	Displays a comment added to the follow-up request, if there is a comment.
Notifications	Displays a list of the notifications sent for the staff round. You can select to re-send the notification.
Details	Displays the Follow-up Details dialog. The Resolving Staff name can be edited, and the follow-up can be resolved from this dialog.

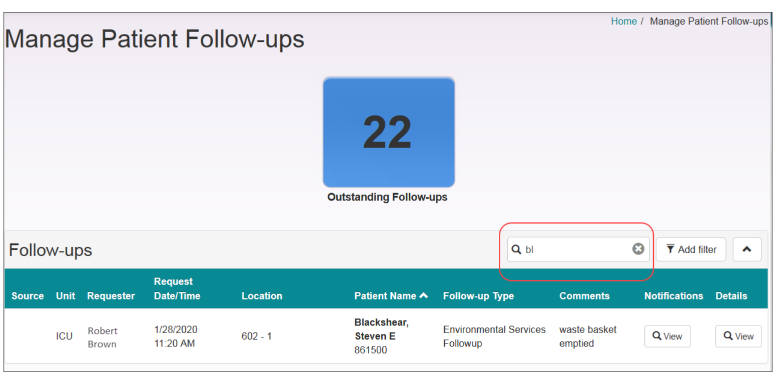
5. Click a column label to sort the grid by that column. For example, click the Follow-up Type column to sort the staff list by the type of follow-up, in alphabetical order.



An up/down arrow appears in the column label. You can toggle between ascending and descending alphabetical order by clicking the arrow.

6. Enter a term in the search field and press **Enter** on the keyboard to return the list of patients with follow-up requests that you want to work with.

   Search is performed on the staff's first and last name. Enter at least one letter to initiate the search.

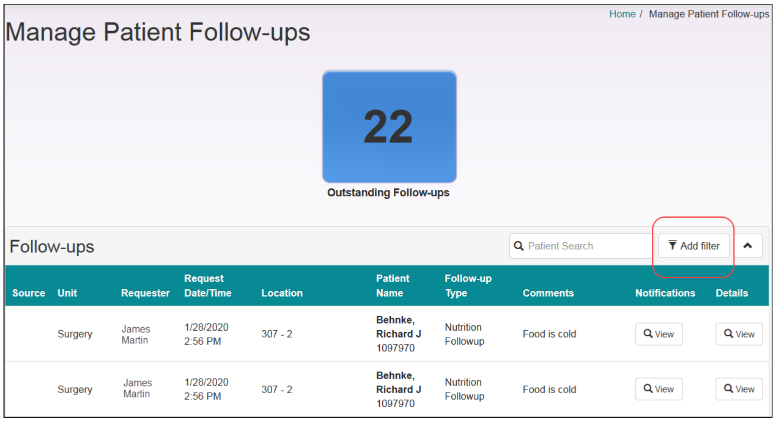


Click the **X** in the search field to remove the search, and display the complete patient list.

Filtering the Follow-ups List

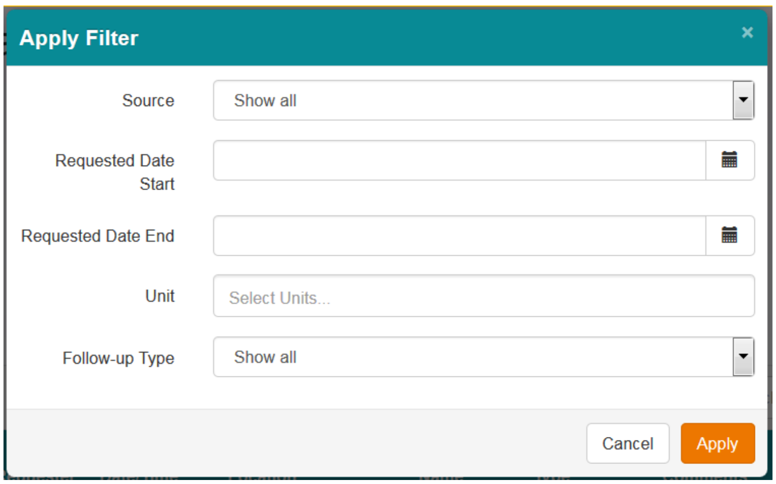
You can filter the list in Manage Patient Follow-ups by module, date, facility unit, and type of follow-up request, to quickly identify the follow-ups you want to work with.

1. Select **Add Filter** in Manage Patient Follow-ups.



The Apply Filter dialog displays.

2. Configure the **Apply Filter** dialog to restrict the displayed list of patients by the criteria you require.



3. Use the following table to understand the configuration settings in the Apply Filter dialog.

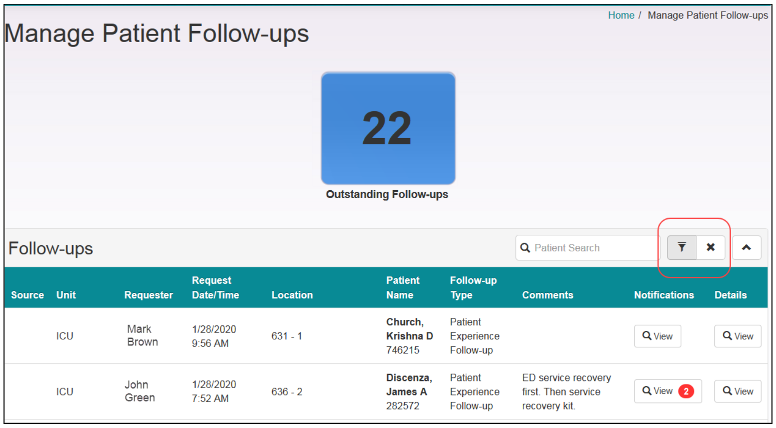
   You can filter simply by one setting such as Unit, or you can expand your filtering capability by using a combination of settings, such as module and round type for a particular date range.

Setting	Description
Source	Displays a list of the VCE modules that you are authorized to work with. Select all, or narrow your view to a particular module.
Requested Date Start	Displays a calendar to select the start date for your filter.
Requested Date End	Displays a calendar to select the end date for your filter.
Unit	Displays a list of the facility units that you are authorized to work with. Select as many units as you need to view. By default, none are selected.
Follow-up Type	Displays a list of the follow-up types that have an active request across the facility units and modules you have selected.

4. Select one of the following to exit the Apply Filter dialog.
   - **Cancel**: Exit the filter dialog without saving the settings.
   - **Apply**: Save and apply the filter settings to the list displayed in the Manage Patient Follow-ups page.

Select **Apply**, and the list in Manage Manage Patient Follow-ups now displays only the patients who meet the filter criteria. The count in the dashboard continues to display the total number of outstanding follow-ups.

5. Click the **X** to remove any filters on the patient list.



The list in Manage Manage Patient Follow-ups now displays all the patients who have an outstanding follow-up request.

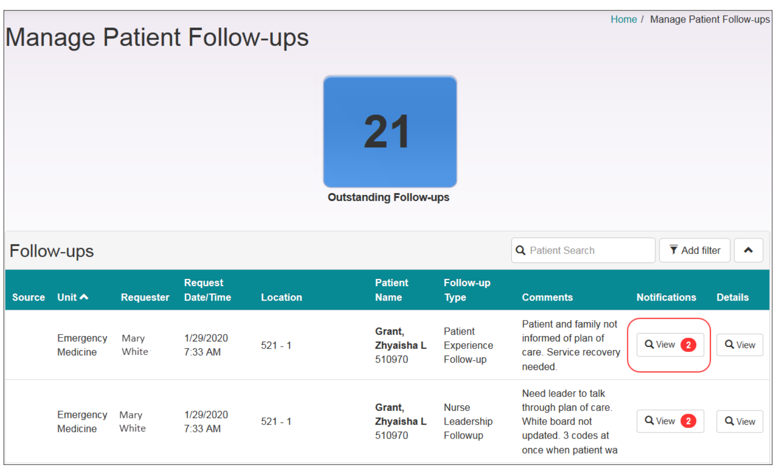
Working with Follow-up Request Notifications

A follow-up request email message is initiated by a round survey question, and can be resent in an escalation path.

The follow-up escalation path is determined by your facility. Contact your Supervisor or a VCE Client Services Manager for information, if needed.

1. Select **View** in the Notifications column in Manage Patient Follow-ups.

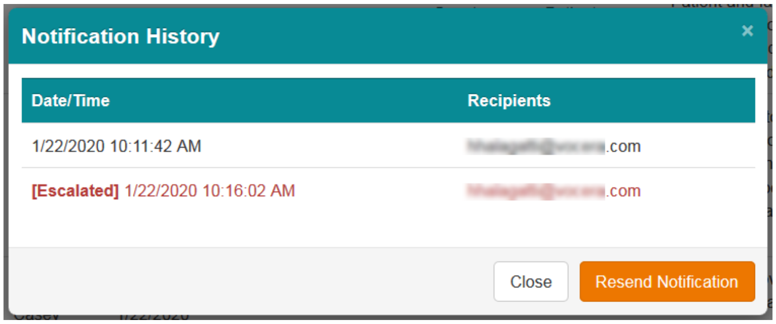
   The View icon displays a count for each time the follow-up request has been sent, including the initial notification. In this example, the notification has been sent twice.



   The Notification History displays.

2. Review the list of notifications sent for the follow-up request.

   In this example, the original request was sent to the recipient at 10:11AM. The notification was sent again (escalated) to the same recipient at 10:16AM. The escalation time can be defined by your facility.

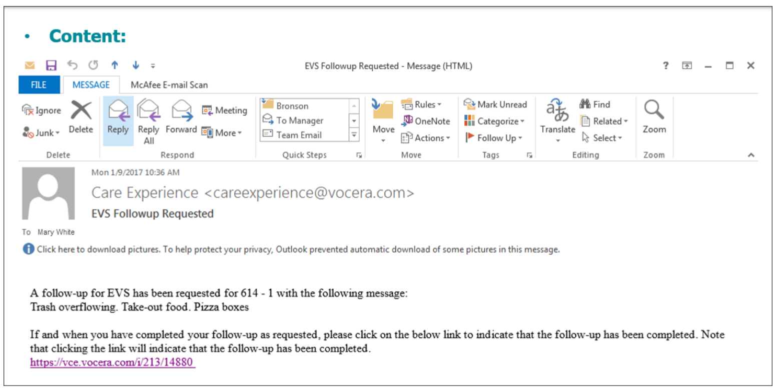


Select one of the following to exit the Notification History:

- **Close**: Leave the history without sending the notification.
- **Resend Notification**: Send the notification to the recipient again.

3. Locate the notification in your email Inbox, when you are the recipient for a follow-up request notification.

   This example displays the type of information provided in a typical follow-up request notification email. A link is provided to complete the follow-up in the system.

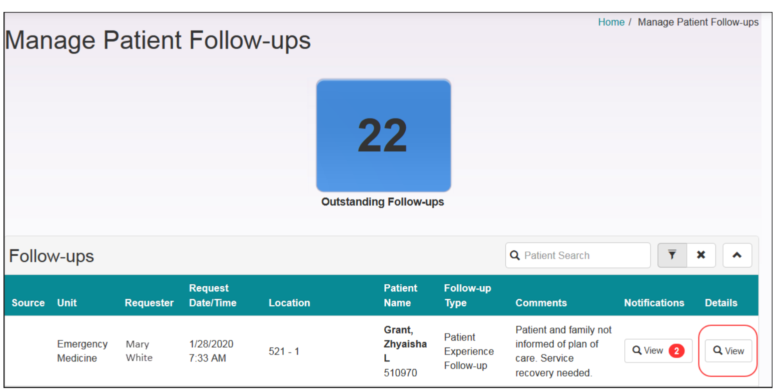


Next, resolve the follow-up request. Refer to Resolving a Follow-up Request on page 61 for more information.

Resolving a Follow-up Request

In Follow-up Details, you can change the resolving staff and close the follow-up request.

1. Select the **View** icon in the Details column for the patient's follow-up request that you want to work with.

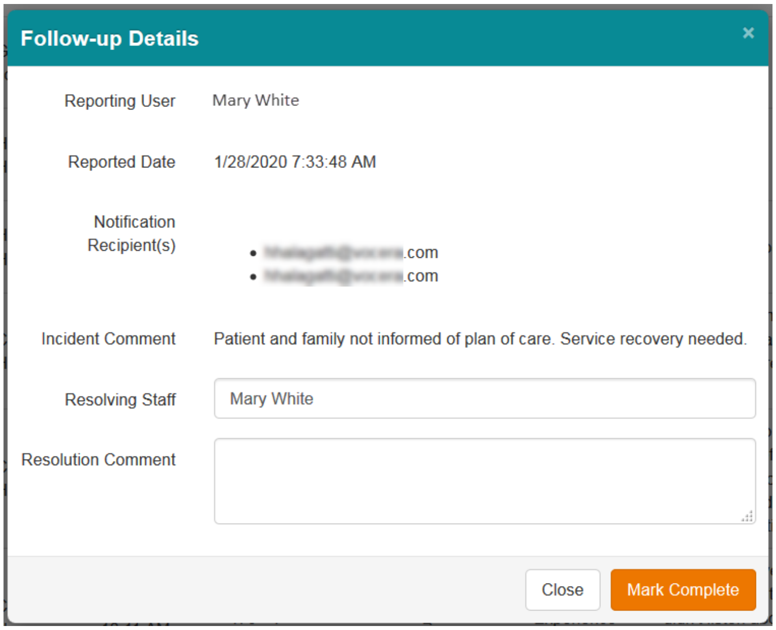


   The **Follow-up Details** dialog displays.

2. Edit the **Follow-up Details** dialog as needed.

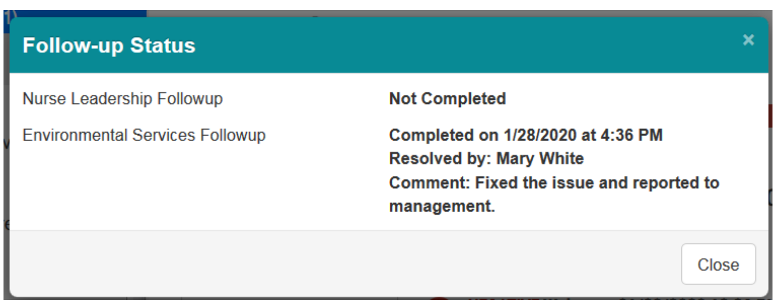
You can edit the Resolving Staff field by selecting from a dropdown list of associated staff. For example, you may need to change the original assignment to yourself, if you are closing the follow-up request.

Enter a complete explanation of the actions taken to address the request in the Resolution Comment field.



3. Select one of the following to exit the **Follow-up Details** dialog:
   - **Close**: Exit the dialog and return to Manage Patient Follow-ups without making a change.
   - **Mark Complete**: Resolve the follow-up request; the resolved request no longer appears in Manage Patient Follow-ups list.
4. Navigate to the Care Round module and display the patient's Round History to verify the resolution.

   The resolved follow-up is reported in the follow-up type in the Round History. In this example, the patient has two follow-up requests; an Environmental Services Follow-up has been resolved, and a Nurse Leadership Follow-up is currently open. Refer to Viewing a Patient's Round History on page 39 for more information.



Working with Report Subscriptions

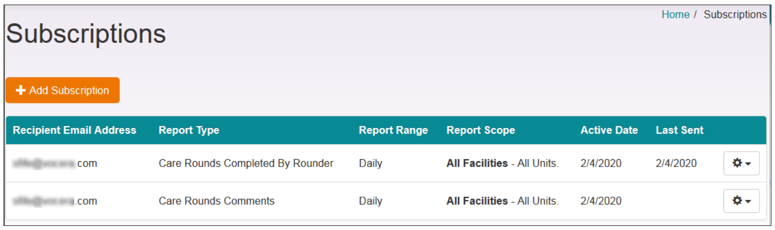
VCE provides retrospective analysis of key data in predefined reports which can be scheduled for delivery to subscribers by email.

A number of reports have been created by VCE to accommodate popular requests made by customers. By default, these reports are provided in either a CSV or PDF output; such as the reports named Care Rounds Completed By Rounder (csv), and Percentage of Patients Who Received a Round(s) by Census (pdf).

With the proper authorization and access, in Manage Report Subscriptions you can select a report and then further define your subscription to the report. You can select a schedule (such as daily or weekly) for the report delivery, select the facility units to report on, and select all the rounding survey types to report on for your new subscription.

You can register your email account as the recipient for predefined reports. You can also subscribe as many email accounts as needed to be recipients of a report. For example, you might subscribe your team members to receive a weekly round report in order to ensure trending is tracked regularly in your team.

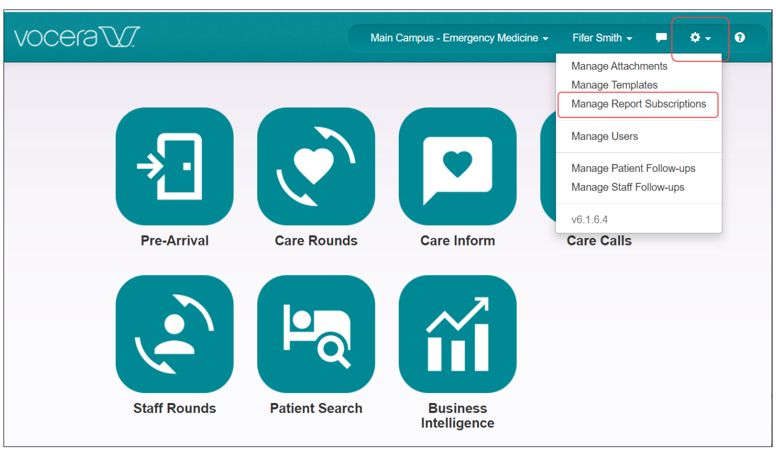
Scheduled report subscriptions are managed in Subscriptions in the VCE application, as shown in this example.



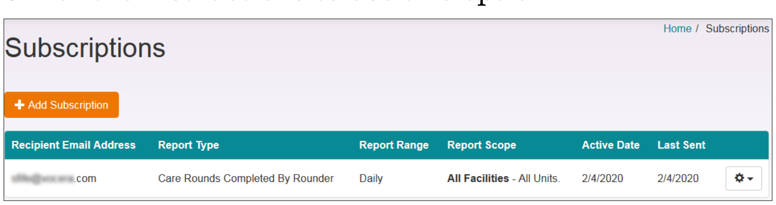
Accessing Report Subscriptions

You can access a list of report subscriptions to view the reports that are being sent to subscribers by email.

1. Select the gear icon in the VCE toolbar. Refer to Using Management Tools on page 18 for more information.
   A drop down menu displays.
2. Select **Manage Report Subscriptions** in the menu.

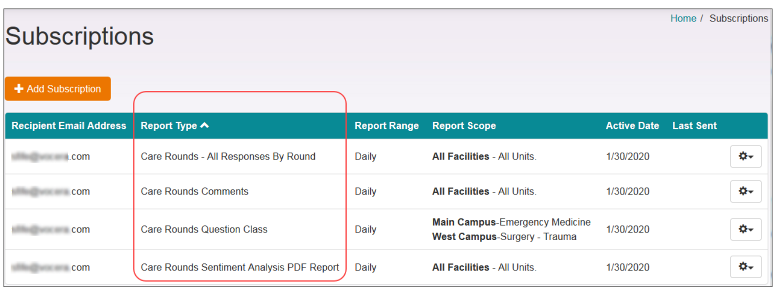
   The Manage Report Subscriptions grid displays.
3. View the scheduled reports listed in the Subscriptions grid.
   The Add Subscription button displays above the grid. Refer to Creating a Report Subscription on page 64 for the instructions to use this option.

4. Use the following table to understand the information displayed in the columns in the Subscriptions grid.

Setting	Description
Recipient Email Address	Displays the email address where the report is sent as scheduled.
Report Type	Displays the name of the report which is sent to the subscriber.
Report Range	Displays the scheduled delivery date range for the report. Range selection may be one of the following: Daily, Weekly, Monthly, Quarterly. Note: Care Rounds Sentiment Analysis PDF Report can be scheduled for delivery Daily, Weekly, or Monthly, but not Quarterly.
Report Scope	Displays the facility units that will be included in the report.
Active Date	Displays the effective date for which the subscription was submitted.
Last Sent	Displays the date when the report was last sent to the subscriber.
Options	Displays a gear icon which provides access to edit and delete functions for the selected subscription. Refer to Editing a Report Subscription on page 69 and Deleting a Report Subscription on page 70 for details.

5. Click a column label to sort the grid by that column. For example, click the Report Type column to sort the Subscriptions list by the report name, in alphabetical order.



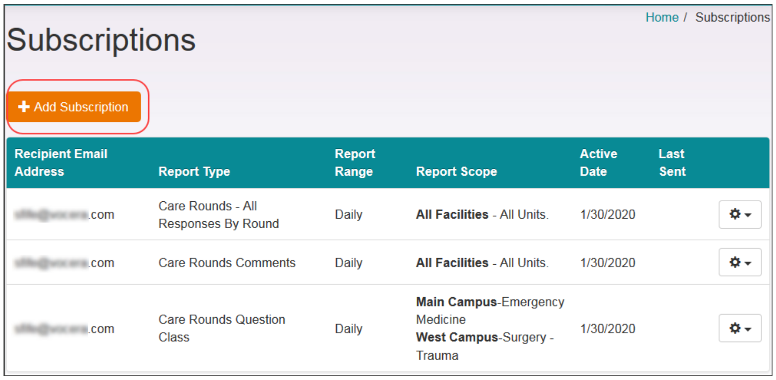
An up/down arrow appears in the Report Type column label. You can toggle between ascending and descending alphabetical order by clicking the arrow.

Next, create a new report subscription.

Creating a Report Subscription

By completing the configuration fields in Subscriptions, you can request scheduled delivery of the predefined reports you need to perform your job responsibilities.

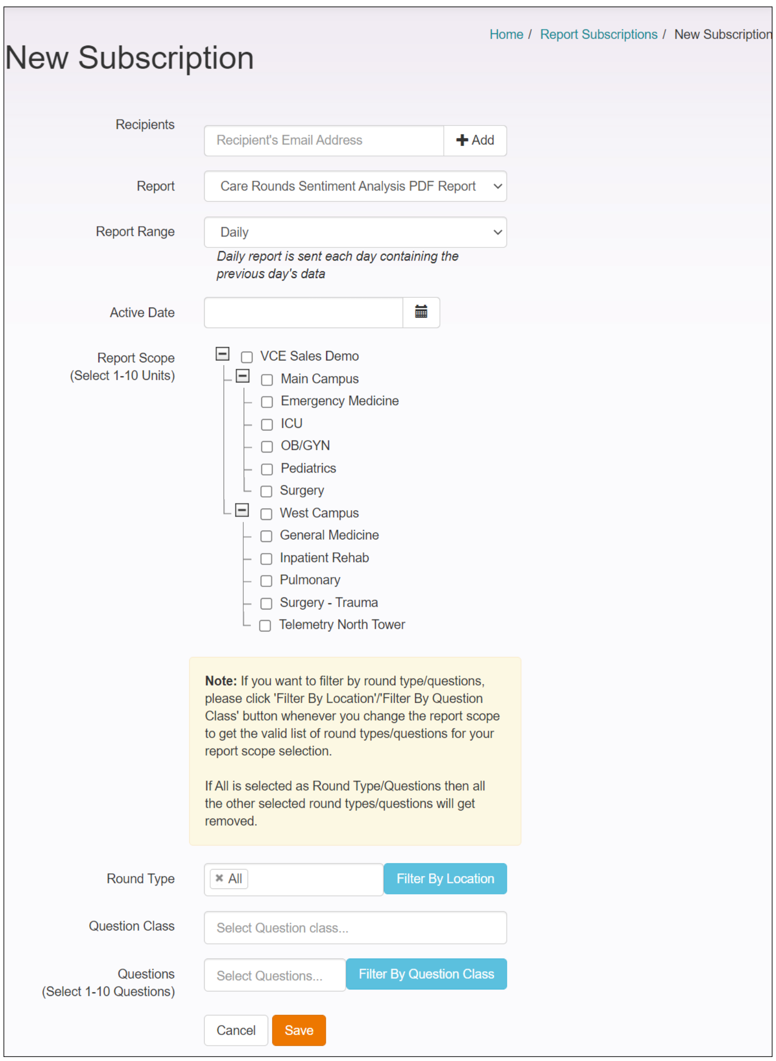
1. Select **Add Subscription** in the Subscriptions grid.



The New Subscription form displays.

2. Configure the settings in the **New Subscription** form.

   Configuration options displayed in the user interface depend on the report parameters and the output. The screencapture below provides guidance for the report subscription fields; please refer to the table for the complete list of options for each report.



3. Use the following table to understand the settings to configure in the New Subscription form.

Setting	Description
Recipients	Enter the new recipient's email address in the text field, and click **Add**. The email address displays above the text field. Enter an email address for each recipient that you wish to receive the selected report.
Report	Select the report you want sent to the selected recipients. The Report field displays a dropdown list of predefined reports. Refer to Understanding the Defined Reports on page 72 for information about each report.
Report Range	Select a schedule for the report delivery. The Report Range field displays the following dropdown list of options: Daily, Weekly, Monthly, Quarterly, Yearly. • **Daily** report is sent each day, containing the previous day's data. • **Weekly** report is sent each Sunday, containing the previous week's (Sunday – Saturday) data. • **Monthly** report is sent on the first day of each month, containing the previous calendar month's data. • **Quarterly** report is sent on the first day after each quarter, containing the previous calendar quarter’s data. • **Yearly** report is sent on the first day of each month containing the previous 12 month's data. **Note:** Care Rounds Sentiment Analysis PDF Report can be scheduled for delivery Daily, Weekly, or Monthly, but not Quarterly. **Note:** The Daily report range is not allowed for the following reports: • Staff Rounds - Number of Rounds Completed Trend • Care Rounds - Number of Rounds Completed Trend **Note:** The Yearly report range is provided only for the following reports: • Staff Rounds - Number of Rounds Completed by Location • Care Rounds - Number of Rounds Completed by Location • Staff Rounds - Number of Rounds Completed Trend • Care Rounds - Number of Rounds Completed Trend
Report Options	Select one or both of the Report Options checkboxes to include additional information in the CVS report output. (Not shown in the above image.) • **Include Column Headers in CSV** - display a header for each column in the CSV output. • **Include Vocera Title in CSV** - display the report title information, including name, location, time frame, etc.

Setting	Description
Active Date	Select the date on which the subscription should become effective. The Active Date defines when a subscription should begin to be analyzed, to determine if a report is generated or not. When an Active Date is in the future, then the system will not even look at that subscription to determine if a report should be generated or not until that date is reached. The Active Date field displays a calendar where you can select the date to start the report subscription.
Report Level	Select the facilities and units that you want to report on in the report subscription. Unit is selected by default. (Not shown in the above image.) **Note:** The Report Level option displays only when configuring the following report subscriptions: • Staff Rounds - Number of Rounds Completed by Location • Care Rounds - Number of Rounds Completed by Location • Staff Rounds - Number of Rounds Completed Trend • Care Rounds - Number of Rounds Completed Trend Select **Facility** or **Unit** level in the two Care Rounds report subscriptions. **Note:** Select units in one facility; reports cannot be generated for units in different facilities. Select **Facility** or **Department** level in the two Staff Rounds report subscriptions. **Note:** See the **Departments** field description for additional information.
Report Scope	Select the facilities and units that you want to report on with this subscription. For example, depending on the needs of your report recipients, you can select the facility level to report on all units in the facility, or you can select units within a particular facility. Click in a box to select a facility or unit. If you select a facility checkbox, the units within the facility are selected by default although a check does not display. Please note that the Care Rounds Sentiment Analysis PDF report scope is limited to a maximum of 10 units.

Setting	Description
Goal Line	Enter a numeric whole number in the Goal Line text field, next to the Report Scope field. (Not shown in the above image.) Each unit (or facility) can have a goal line entry. Positive values to a maximum of 200,000 are allowed. Entering no value will result in a blank text field. **Note:** The Goal Line option displays only when configuring the following report subscriptions: • Staff Rounds - Number of Rounds Completed by Location • Care Rounds - Number of Rounds Completed by Location • Staff Rounds - Number of Rounds Completed Trend • Care Rounds - Number of Rounds Completed Trend
Departments	Select the departments to report on for the selected locations. (Not shown in the above image.) This option displays when Department is chosen in the **Report Level** field. This option displays only when configuring the **Staff Rounds - Number of Rounds Completed by Location** subscription. If you change the report scope selection, click **Filter by Location** to display the valid list of departments for your facility unit selection. Note that if you select All, then any selected departments previously selected will be removed because All is a superset of the available selections.
Round Type	Select as many types of rounding surveys as needed for your report subscription. By default, all round types are selected for delivery. If you change the report scope selection, click **Filter by Location** to display the valid list of round types for your facility unit selection. Note that if you select All, any individual round type previously selected will be removed because All is a superset of the available selections.
Question Class	Select as many question classes as needed for your report. The dropdown list displays the list of question types used in the report. By default, all question classes are selected for delivery. This field displays when **Care Rounds Sentiment Analysis PDF Report** (pdf) is selected in the Report field. Note that if you select All, any individual question class previously selected will be removed because All is a superset of the available selections.
Questions	Select as many questions as needed, to a maximum of 10. The dropdown list displays the list of questions used in the report. By default, all questions are selected for delivery. This field displays when **Care Rounds Sentiment Analysis PDF Report** (pdf) is selected in the Report field. If you change the Report Scope selection, click **Filter by Question Class** to display the valid list of questions for your facility unit selection. Note that if you select All, any individual question previously selected will be removed because All is a superset of the available selections.

4. Select one of the following to exit the Edit Subscription form.

- **Cancel**: Close the Edit Subscription form without creating a new subscription. The Subscriptions grid displays again.
- **Save**: Immediately creates the report subscription in the system. The Subscriptions grid displays the new report in the list.

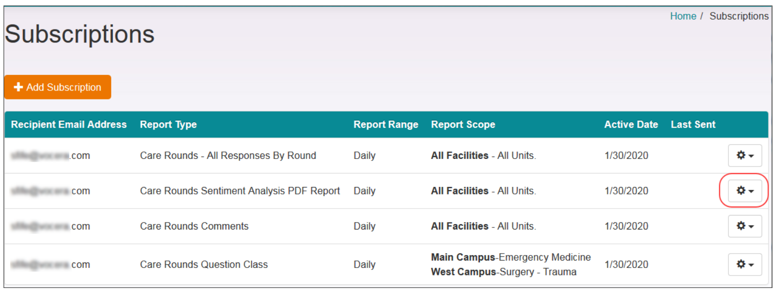
Next, edit an existing report subscription.

Editing a Report Subscription

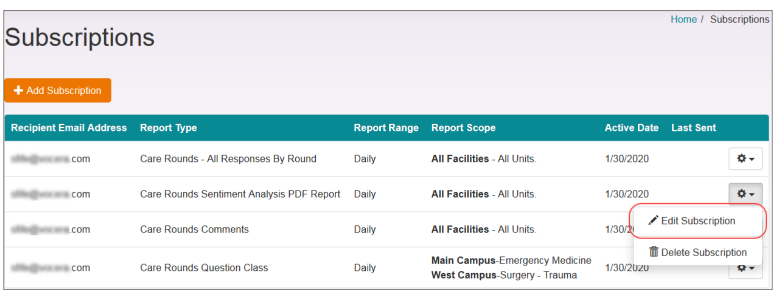
An existing subscription can be easily edited, and the changes are implemented immediately in the system.

When new staff join your team, for example, you may want to add these email recipients to an existing report subscription used by your team.

1. Navigate to the report subscription you want to edit in the Subscriptions grid.
2. Select **Options** in the last column.

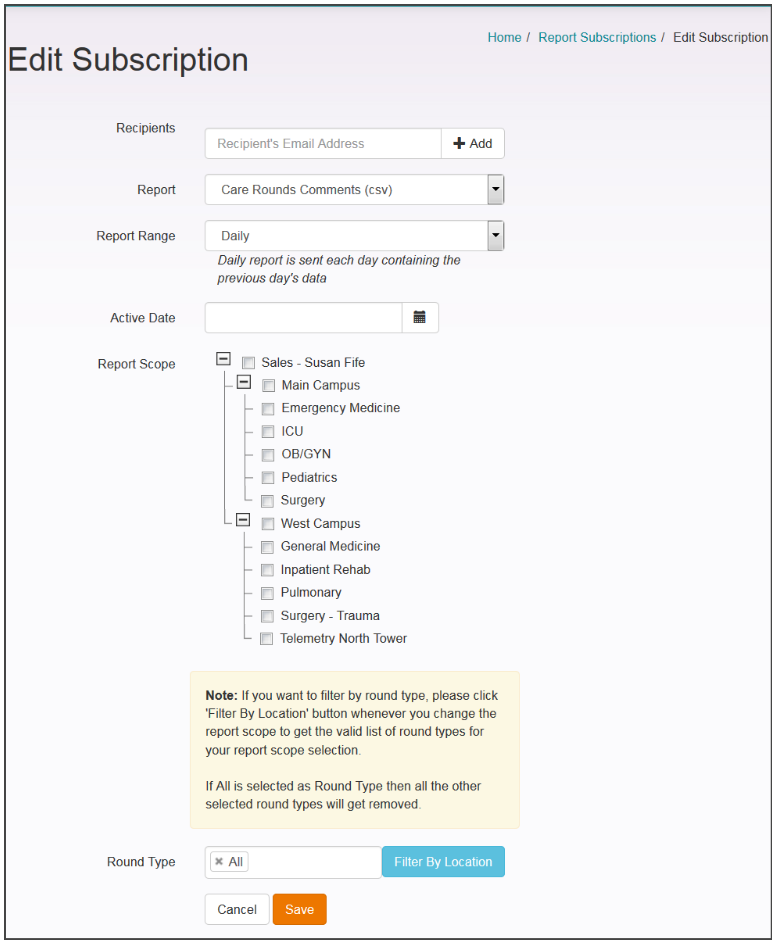


   A drop down menu displays.
3. Select **Edit Subscription** in the menu.



   The current subscription details display.
4. Review the existing report subscription settings in the Edit Subscription form.

   Refer to Creating a Report Subscription on page 64 for details about the subscription settings before revising the current subscription.



5. Select one of the following to exit the Edit Subscription form.
   - **Cancel**: Close the Edit Subscription form without making a change to the subscription.
   - **Save**: Immediately implement the changes made to the subscription in the system.

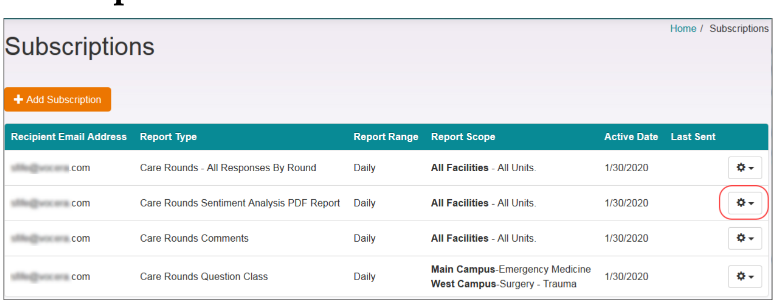
Next, delete an existing report subscription.

Deleting a Report Subscription

When you delete a subscription from VCE, the removal is immediate and irreversable. No record of the subscription is retained in the system.

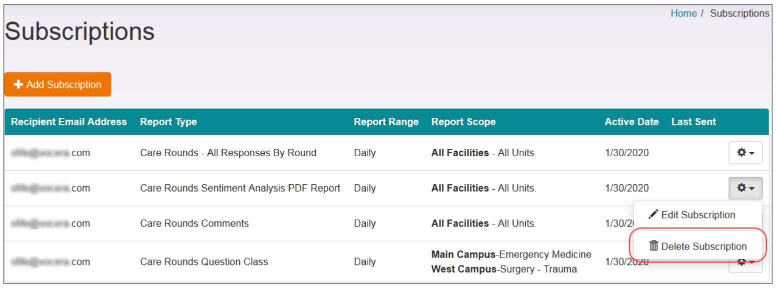
A warning message allows you to verify the choice to delete the subscription from the system before implementing the deletion. You can easily create a new replacement report subscription, however.

1. Navigate to the report subscription you want to delete in the Subscriptions grid.
2. Select **Options** in the last column.



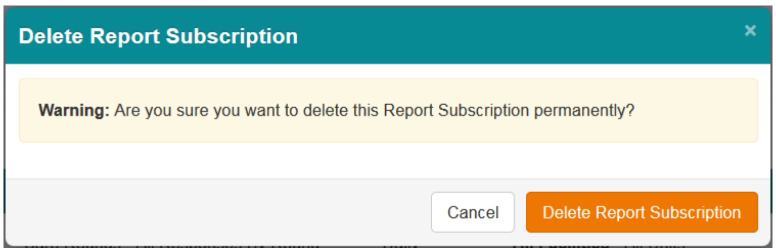
A drop down menu displays.

3. Select **Delete Subscription** in the menu.



A warning message displays.

4. Select one of the following to exit the Delete Report Subscription warning message.



- **Cancel**: The message closes without a change made to the Subscriptions list.
- **Delete Report Subscription**: The message closes and the subscription is immediately removed from Subscriptions list.

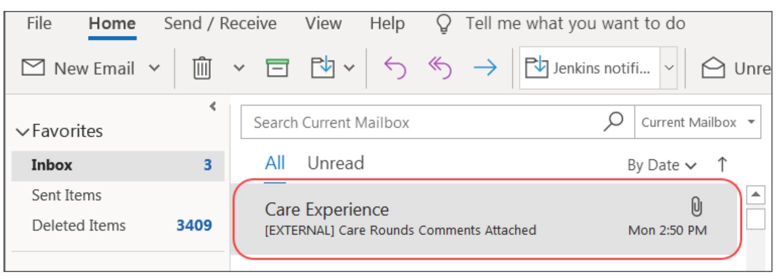
Receiving a Scheduled Report

Once subscribed to a report, you will receive it as a regularly scheduled delivery in your email.

The following is an example of the email and attachment that are received when a scheduled report subscription is delivered. See your Supervisor for details regarding the output or process in your facility.

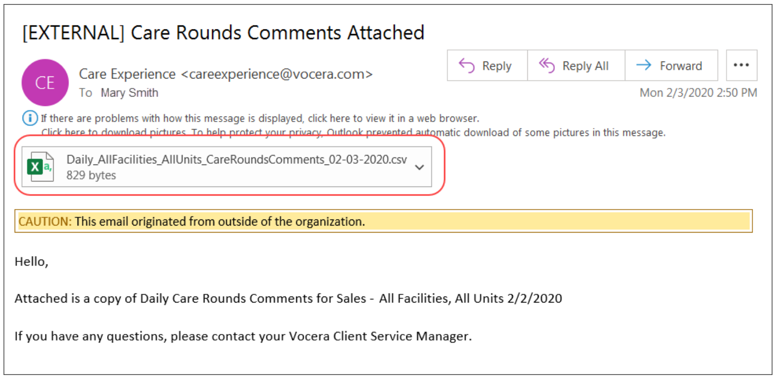
1. Click the VCE message in your email program.

   In this example a Care Rounds Comments scheduled report is attached to the Care Experience email.



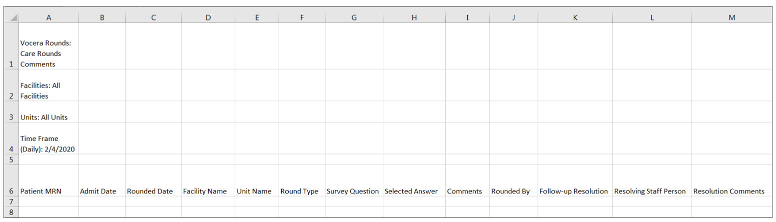
2. Download the attached report file to your local file store.

   The attached file is identified by the report name and date, as shown in this example.



3. Open the file to review the reported data.

   Scheduled reports are provided in PDF, XLSX, or CSV formats. The file contents depend on the report subscription.



   In this example, the scheduled report covers the following information:

   - Row 1 displays the report name.
   - Row 2 displays the facilities covered in the report.
   - Row 3 displays the units covered in the report.
   - Row 4 displays the time period covered in the report.
   - Row 5 is empty.
   - Row 6 displays the questions covered in the survey.
   - Row 7 and below display the data for the questions covered in the survey.

Understanding the Defined Reports

You can learn about each of the scheduled reports available to subscribers.

Care Rounds - Number of Rounds Completed Trend

A line graph displays the number of rounds completed in the selected Facilities or Units, and shows the goal maximum that is set for the locations.

The report header identifies the name of the report, facility, units, round type, and time frame, depending on the settings specified in the subscription. When reporting by facility, a single page is produced which displays the trend for the facility. When reporting on multiple units, a page is produced for each unit.

The horizontal axis of the line graph displays the date of the round completion, and the vertical axis displays the number of rounds. The established goal number displays as an orange number on its own line in the graph.

Below the graph, the data point values are shown in a table. The first row displays the number of rounds completed for each location, and the second row shows the goal metrics.

Users may configure reports for various use cases, and review data by week, month, quarter, or year. For example, a Nursing Director may wish to see trends by week or month.

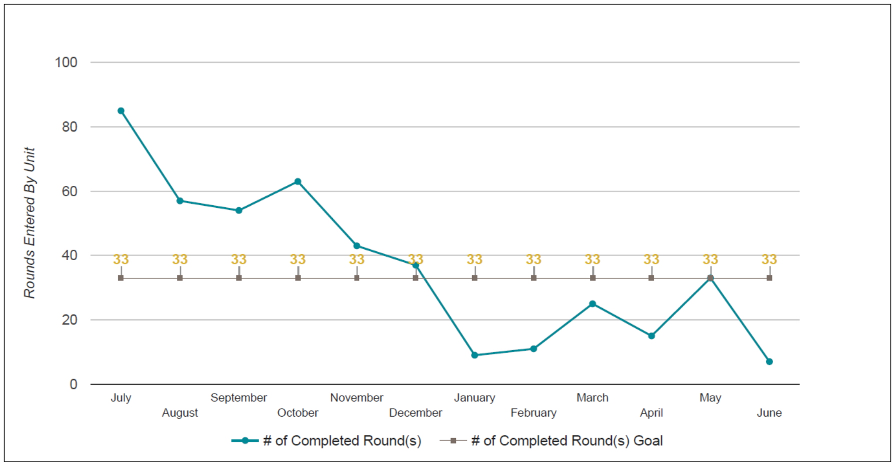
Care Rounds - Number of Rounds Completed Trend is presented as a PDF report.

Vocera Rounds: Care Rounds - Number of Rounds Completed Trend

Facility: Roan Bay Medical Center

Unit: BL3NORTH

Time Frame (Yearly): 01-07-2020 to 30-06-2021



	July	August	September	October	November	December	January	February	March	April	May	June
# Of Completed Round(s)	85	57	54	63	43	37	9	11	25	15	33	7
# Of Completed Round(s) Goal	33	33	33	33	33	33	33	33	33	33	33	33

Staff Rounds - Number of Rounds Completed Trend

A line graph displays the number of rounds completed in the selected Facilities or Departments, and shows the goal maximum that is set for the locations.

The report header identifies the name of the report, facility, round type, and time frame, depending on the settings specified in the subscription.

The horizontal axis of the line graph displays the date of the round completion, and the vertical axis displays the number of rounds. The established goal number displays as an orange number on its own line in the graph.

Below the graph, the data point values are shown in a table. The first row displays the number of rounds completed for each location, and the second row shows the goal metrics.

Users may configure reports for various use cases, and review data by week, month, quarter, or year. For example, a Nursing Director may wish to see trends by week or month.

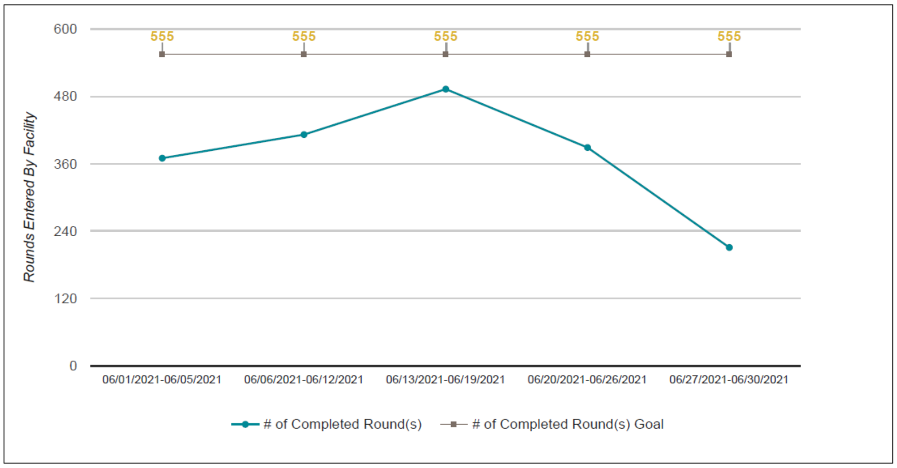
Staff Rounds - Number of Rounds Completed Trend is presented as a PDF report.

Vocera Rounds: Staff Rounds - Number of Rounds Completed Trend

Facility: South West University Medical Center

Round Types: All

Time Frame (Monthly): 01-06-2021 to 30-06-2021



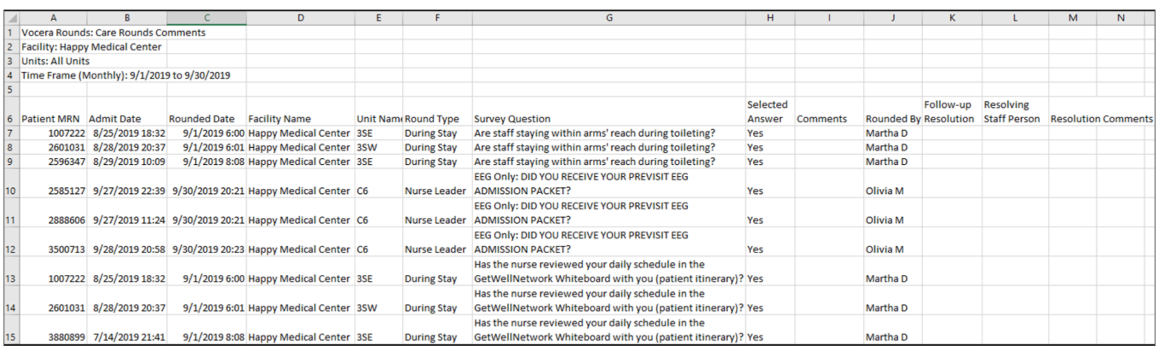
	06/01/2021-06/05/2021	06/06/2021-06/12/2021	06/13/2021-06/19/2021	06/20/2021-06/26/2021	06/27/2021-06/30/2021
# Of Completed Round(s)	370	412	493	389	211
# Of Completed Round(s) Goal	555	555	555	555	555

Care Rounds Comments

All comments attached to the Care Rounds survey questions will appear on this report.

The questions and answers to the questions will also display for reference.

Care Rounds Comments is a CSV report as shown here.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Vocera Rounds: Care Rounds Comments													
2	Facility: Happy Medical Center													
3	Units: All Units													
4	Time Frame (Monthly): 9/1/2019 to 9/30/2019													
5														
6	Patient MRN	Admit Date	Rounded Date	Facility Name	Unit Name	Round Type	Survey Question	Selected Answer	Comments	Rounded By	Follow-up Resolution	Resolving Staff Person	Resolution Comments	
7	1007222	8/25/2019 18:32	9/1/2019 6:00	Happy Medical Center	3SE	During Stay	Are staff staying within arms' reach during toileting?	Yes		Martha D				
8	2601031	8/28/2019 20:37	9/1/2019 6:01	Happy Medical Center	3SW	During Stay	Are staff staying within arms' reach during toileting?	Yes		Martha D				
9	2596347	8/29/2019 10:09	9/1/2019 8:08	Happy Medical Center	3SE	During Stay	Are staff staying within arms' reach during toileting?	Yes		Martha D				
10	2585127	9/27/2019 22:39	9/30/2019 20:21	Happy Medical Center	C6	Nurse Leader	EEG Only: DID YOU RECEIVE YOUR PREVISIT EEG ADMISSION PACKET?	Yes		Olivia M				
11	2888606	9/27/2019 11:24	9/30/2019 20:21	Happy Medical Center	C6	Nurse Leader	EEG Only: DID YOU RECEIVE YOUR PREVISIT EEG ADMISSION PACKET?	Yes		Olivia M				
12	3500713	9/28/2019 20:58	9/30/2019 20:23	Happy Medical Center	C6	Nurse Leader	EEG Only: DID YOU RECEIVE YOUR PREVISIT EEG ADMISSION PACKET?	Yes		Olivia M				
13	1007222	8/25/2019 18:32	9/1/2019 6:00	Happy Medical Center	3SE	During Stay	Has the nurse reviewed your daily schedule in the GetWellNetwork Whiteboard with you (patient itinerary)?	Yes		Martha D				
14	2601031	8/28/2019 20:37	9/1/2019 6:01	Happy Medical Center	3SW	During Stay	Has the nurse reviewed your daily schedule in the GetWellNetwork Whiteboard with you (patient itinerary)?	Yes		Martha D				
15	3880899	7/14/2019 21:41	9/1/2019 8:08	Happy Medical Center	3SE	During Stay	Has the nurse reviewed your daily schedule in the GetWellNetwork Whiteboard with you (patient itinerary)?	Yes		Martha D				

Percentage of Discharged Patients Who Received a Round(s)

A trended graph displays the percentage of patients who received at least one round prior to being discharged.

Patients are identified by their unique visit number, and will be counted in the unit from which they were discharged and a round was performed.

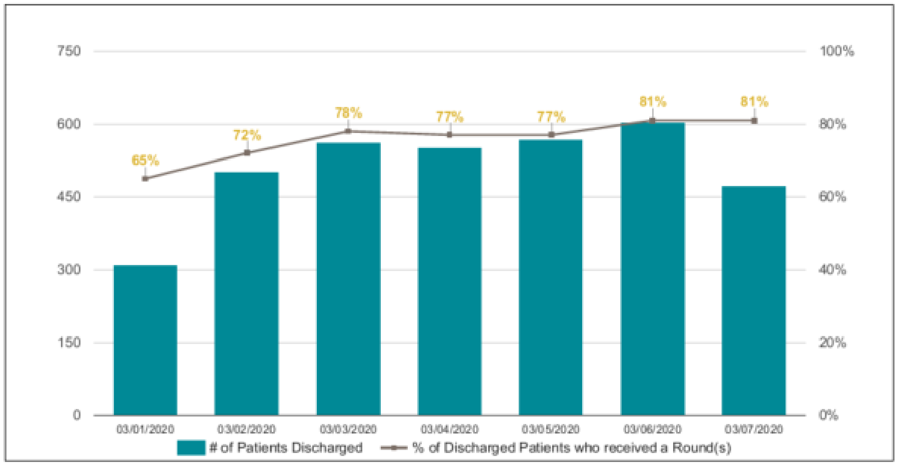
Percentage of Discharged Patients who Received a Round(s) is a PDF report as shown here.

Vocera Rounds: Percentage of Discharged Patients Who Received a Round(s)

Facilities: All Facilities

Units: All Units

Time Frame (Weekly): 3/1/2020 to 3/7/2020



	03/01/2020	03/02/2020	03/03/2020	03/04/2020	03/05/2020	03/06/2020	03/07/2020	Summary
% of Discharged Patients who received a Round(s)	65%	72%	78%	77%	77%	81%	81%	76.8 %
# of Patients Discharged	309	500	562	551	568	603	470	3563
# of Discharged Patients who received a Round(s)	201	358	440	426	437	491	382	2735

Staff Comments

This Staff Rounds module report includes all the questions and responses for rounds performed on staff.

The report provides a breakdown by question class and allows you to share comments and staff recognitions.

Staff Rounds' Staff Comments is a CSV report as shown here.

Vocera Rounds: Staff Comments
Facility: Midtown Central
Units: All Units
Time Frame (Daily): 1 3/12/2020

Rounded D	Round Typ	Facility Name	Unit Nam	Departme	Survey Question	Selected Answer	Comments	Rounded By	Staff Name
12-Mar-20	Everyday I	Midtown	EOC	4 Main	No food or drink in patient care areas	Not Met	dayroom	J Smith	John
13-Mar-20	Everyday I	Midtown	EOC	5 Main	No food or drink in patient care areas	Not Met	Drinks found unattended @ NS B		Deb
14-Mar-20	Everyday I	Midtown	EOC	6 Main	Bathroom emergency cords not wrapped around grab bars	Met	no emergency cords on the unit	J Smith	Hanna
15-Mar-20	Everyday I	Midtown	EOC	7 Main	Refrigerators clean, no expired/unlabeled items	Unable to Survey	No patient room refrigerators	J Smith	Mike
16-Mar-20	Everyday I	Midtown	EOC	8 Main	Refrigerators clean, no expired/unlabeled items	Met	no refrigerators in patient rooms	J Smith	Jonathon
17-Mar-20	Everyday I	Midtown	EOC	9 Main	Needles/syringes/meds under constant surveillance, or locked	Met	none in the rooms	J Smith	Randy
18-Mar-20	Everyday I	Midtown	EOC	10 Main	Needles/syringes/meds under constant surveillance, or locked	Met	Not in pts' rooms, psychiatry	J Smith	Jennifer
19-Mar-20	Everyday I	Midtown	EOC	11 Main	Hallways minimum 8 foot clearance (exceptions: code carts, chemo/isolation carts for specific patients; mobile computers if in use)	Not Met	Patient sitting in recliner in hallway. Asked to place back in room for safety.	J Smith	Brenda
20-Mar-20	Everyday I	Midtown	EOC	12 Main	Under sink storage: only sharps containers, trash bags, cleaning agents, battery buckets	Met	Soda stored under sink in nutrition room	J Smith	Barbara
21-Mar-20	Everyday I	Midtown	EOC	13 Main	No food or drink in patient care areas	Met	Staff eating and drinking at nursing stations. Staff reminded of importance of keeping nursing station free and clear of drinks and snacks	J Smith	Barbara
22-Mar-20	Everyday I	Midtown	EOC	14 Main	Observe for stained or poorly seated ceiling tiles	Not Met	stained ceiling in breakroom	J Smith	Nicole
23-Mar-20	Everyday I	Midtown	EOC	15 Main	O2 tanks: only full tanks in 'full' racks ; all others in 'empty' rack	Not Met	Tank found with cap off in 'full' rack. Placed in 'empty' rack.	J Smith	Peter
24-Mar-20	Everyday I	Midtown	EOC	16 Main	Stairwells completely clear	Not Met	Vacuum Backpack still in stairwell. Told House Keeping again. They will contact Manager.	J Smith	Peter
25-Mar-20	Everyday I	Midtown	EOC	Main	Bathroom emergency cords not wrapped around grab bars				

Staff Rounds - All Responses By Rounds

This report displays all the questions and responses for staff rounds by the round number.

All questions display, in a standard order, without the presence of answers for easy report comparison. The format of this report allows for quick filter and sort options.

Staff Rounds - All Responses By Rounds is a CSV report as shown here.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Vocera Rounds: Staff Rounds - All Responses by Round													
2	Facilities: All Facilities													
3	Units: All Units													
4	Time Frame (Weekly): 10/28/2018 to 11/3/2018													
5														
6	RoundNumber	Round Date	Unit	Department	Staff	RoundBy	RoundType	Role	Is the Emergency Pull Cord unwrapped?	Is the Emergency Pull Cord unwrapped? Comments	Was trash/linen picked up?	Was trash/linen picked up? Comments	Was Room/office/work area organized and put together?	Was Room/office/work area organized and put together?Com
7	13929	10/29/2019 8:56	Med/Surg	EVS	Romona N	Paul S	EVS		N/A		Yes		Yes	
8	139330	10/29/2019 9:58	Med/Surg	EVS	Florita C	Paul S	EVS		N/A		Yes		Cleaning facilities	
9	139331	10/29/2019 11:05	Med/Surg	EVS	Margarita H	Paul S	EVS		Yes		Yes		Yes	

Vocera Rounds: Staff Rounds Unit Usage

Access a summary of the most commonly used rounding success indictors.

The Staff Rounds Unit Usage report is often used by Hospital Executives on a dashboard to view the overall rounding practices on all units. The report provides an overall summary of selected units and then a breakout by unit.

Staff Rounds Unit Usage is a CSV report as shown here.

	A	B	C	D	E	F	G	H	I
1	Vocera Rounds: Staff Rounds Unit Usage								
2	Facilities: All Facilities								
3	Units: All Units								
4	Time Frame (Weekly): 11/6/2022 to 11/12/2022								
5									
6	Location	Count Of	11/6/2022	11/7/2022	11/8/2022	11/9/2022	11/10/2022	11/11/2022	11/12/2022
7	All Facilities All Units	# of Rounds	0	0	0	0	0	0	0
8	All Facilities All Units	# of Rounded Staff	0	0	0	0	0	0	0
9	All Facilities All Units	# of Staff Recognitions	0	0	0	0	0	0	0
10	All Facilities All Units	# of Follow-ups	0	0	0	0	0	0	0
11	All Facilities All Units	# of Completed Follow-ups	0	0	0	0	0	0	0
12	All Facilities All Units	# of Rounders	0	0	0	0	0	0	0
13	Jersey Shore University Medical Center Care Transition Center	# of Rounds	0	0	0	0	0	0	0
14	Jersey Shore University Medical Center Care Transition Center	# of Rounded Staff	0	0	0	0	0	0	0
15	Jersey Shore University Medical Center Care Transition Center	# of Staff Recognitions	0	0	0	0	0	0	0
16	Jersey Shore University Medical Center Care Transition Center	# of Follow-ups	0	0	0	0	0	0	0
17	Jersey Shore University Medical Center Care Transition Center	# of Completed Follow-ups	0	0	0	0	0	0	0
18	Jersey Shore University Medical Center Care Transition Center	# of Rounders	0	0	0	0	0	0	0
19	Jersey Shore University Medical Center Ackerman 2 & 5	# of Rounds	0	0	0	0	0	0	0
20	Jersey Shore University Medical Center Ackerman 2 & 5	# of Rounded Staff	0	0	0	0	0	0	0
21	Jersey Shore University Medical Center Ackerman 2 & 5	# of Staff Recognitions	0	0	0	0	0	0	0
22	Jersey Shore University Medical Center Ackerman 2 & 5	# of Follow-ups	0	0	0	0	0	0	0
23	Jersey Shore University Medical Center Ackerman 2 & 5	# of Completed Follow-ups	0	0	0	0	0	0	0
24	Jersey Shore University Medical Center Ackerman 2 & 5	# of Rounders	0	0	0	0	0	0	0
25	Jersey Shore University Medical Center Booker 2 - Maternity	# of Rounds	0	0	0	0	0	0	0

Unit Usage

Access a summary of the most commonly used rounding success indictors.

Unit Usage is often used by Hospital Executives on a dashboard to view the overall rounding practices on all units. The report provides an overall summary of selected units and then a breakout by unit.

Unit Usage is a CSV report as shown here.

Location	Count Of	6/24/2018	6/25/2018	6/26/2018	6/27/2018	6/28/2018	6/29/2018	6/30/2018
Hospital All Units	# of Rounds	25	203	149	251	173	201	36
Hospital All Units	# of Patients to Receive a Round	25	159	132	184	151	160	36
Hospital All Units	# of Rounds with a Positive Rating	0	1	0	3	3	0	0
Hospital All Units	# of Staff Recognitions	2	8	5	7	1	3	0
Hospital All Units	# of Follow-ups	0	0	0	18	54	18	0
Hospital All Units	# of Completed Follow-ups	0	0	0	18	18	18	0
Hospital All Units	# of Rounders	6	24	31	32	29	31	8
Hospital All Units	# of Patients Discharged	89	89	122	105	118	108	117
Hospital All Units	% of Discharged Patients with Rounds	71.91%	68.54%	86.07%	83.81%	76.27%	80.56%	70.94%
Hospital All Units	# Census	616	708	717	743	750	728	679
Hospital All Units	% Census with Rounds	4.06%	22.46%	18.41%	24.76%	20.13%	21.98%	5.30%

Care Calls Comments

All comments attached to the Care Calls survey questions will appear on this report.

The questions and the answers to the questions will also display for reference.

Care Calls Comments is a CSV report as shown here.

Vocera Rounds: Care Calls Comments
Facility: Happy Medical Center
Units: All Units
Time Frame (Monthly): 9/1/2019 to 9/30/2019

Patient M	Discharge Date	Care Call Date	Discharge Facility	Discharge Unit	Question Class	Survey Question	Selected Answer	Comments	Called By	Follow-up Resolution	Resolving Staff Person	Resolution Comments
1586867	8/26/2019 15:09	9/3/2019 9:45	Happy Medical Center	7W Surgery	CC_Letter	Did patient receive the permission letter?	Declined		Debbie Smith			
3834939	8/26/2019 9:38	9/3/2019 9:50	Happy Medical Center	7W Surgery	CC_Letter	Did patient receive the permission letter?	Yes		Debbie Smith			
3370714	8/26/2019 23:59	9/3/2019 9:51	Happy Medical Center	7W Surgery	CC_Letter	Did patient receive the permission letter?	Declined		Debbie Smith			
1237917	8/26/2019 16:25	9/3/2019 13:17	Happy Medical Center	7W Surgery	CC_Letter	Did patient receive the permission letter?	Yes		Debbie Smith			
2522728	8/27/2019 7:45	9/4/2019 12:13	Happy Medical Center	7W Surgery	CC_InstructionsGiven	Did the written instructions you were given help you get ready for your surgery and getting to the hospital?			Debbie Smith			
1586867	8/26/2019 15:09	9/3/2019 9:45	Happy Medical Center	7W Surgery	CC_InstructionsGiven	Did the written instructions you were given help you get ready for your surgery and getting to the hospital?			Debbie Smith			
3738562	9/19/2019 23:59	9/27/2019 14:29	Happy Medical Center	7W Surgery	CC_InstructionsGiven	Did the written instructions you were given help you get ready for your surgery and getting to the hospital?			Debbie Smith			

Care Rounds Question Class

View the survey question, question class, and details around the response rates and percentages in this report.

This Question Class report breaks down the Care Rounds data by the selected answers. Questions are grouped, or broken into classes, to easily compare the similar responses. The format of this report allows for easy sorting and filtering for a specific question, or class.

Care Rounds Question Class is a CSV report as shown here.

Vocera Rounds: Care Rounds Question Class
Facility: Happy Medical Center
Units: All Units
Time Frame (Monthly): 9/1/2019 to 9/30/2019

Question Class	Survey Question	Selected Answer	# of Survey Question Class Answered	Total Count of Survey Question Class Answered	% of Total Rounds Answered This Way
	Is there a visitor available to complete the round?	No	103	354	29.10%
	Is there a visitor available to complete the round?	Not Answered	65	354	18.36%
	Is there a visitor available to complete the round?	Yes	186	354	52.54%
CR_2DaysPostOp	Seek out and support those who appear lost or need help		124	124	100.00%
CR_2DaysPostOp	Seek out and support those who appear lost or need help	Yes	0	124	0.00%
CR_ActivityNeeds	Do you feel like your child's play/activity needs are being met?	N/A	0	13	0.00%
CR_ActivityNeeds	Do you feel like your child's play/activity needs are being met?	Not Answered	12	13	92.31%
CR_ActivityNeeds	Do you feel like your child's play/activity needs are being met?	Somewhat	0	13	0.00%
CR_ActivityNeeds	Do you feel like your child's play/activity needs are being met?	Yes	1	13	7.69%
CR_AddressingConcerns	PEDS ICU ONLY: Did the nurse answer your questions and address your concerns?	N/A	1	142	0.70%
CR_AddressingConcerns	PEDS ICU ONLY: Did the nurse answer your questions and address your concerns?	No	0	142	0.00%
CR_AddressingConcerns	PEDS ICU ONLY: Did the nurse answer your questions and address your concerns?	Not Answered	141	142	99.30%

Percentage of Patients Who Received a Round(s) by Census

View the percentage and the number of patients in the daily census who have received at least one round.

The percentage of patients who received a round(s) by census report allows you to filter data by the type of round, and by census preference.

By default, the census is calculated on a daily (morning) basis, but a 24-hour method may also be provided. This table describes the methods for calculating census.

Census based on morning	Patients who were admitted to, or transferred to, the unit prior to 7AM on that day will be included in the day's census. Patients who were discharged, or transferred, out of the unit after 7AM will be counted in the census for that day. Patients discharged or transferred out of the unit between the hours of 12:01AM and 7:00AM **will not** be included in that day's census.
Census based on a 24-hour period	All patients who were in the unit that day at any point will be included in the day's census.

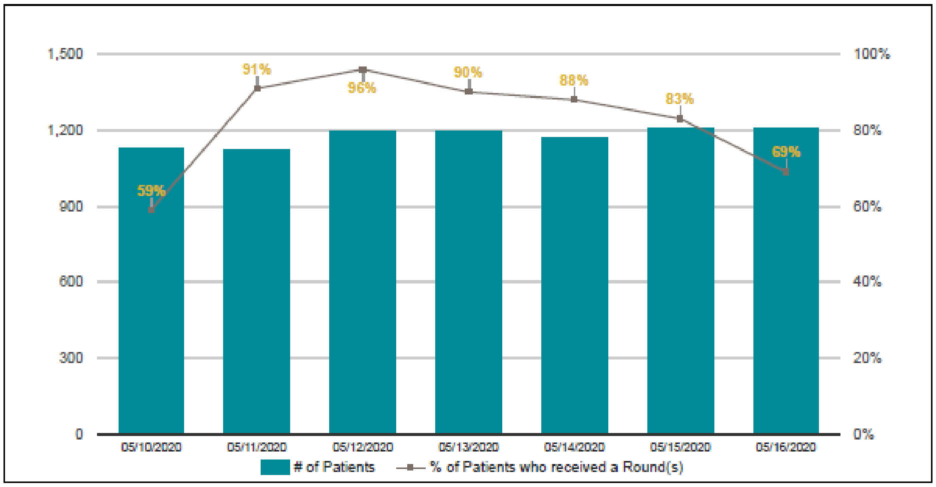
Percentage of Patients who Received a Round(s) by Census is a PDF report as shown here.

Vocera Rounds: Percentage of Patients Who Received a Round(s) by Census

Facilities: All Facilities

Units: All Units

Time Frame (Weekly): 5/10/2020 to 5/16/2020



	05/10/2020	05/11/2020	05/12/2020	05/13/2020	05/14/2020	05/15/2020	05/16/2020	Summary
% of Patients who received a Round(s)	59%	91%	96%	90%	88%	83%	69%	82.2 %
# of Patients	1133	1123	1196	1197	1175	1211	1212	8247
# of Patients who received a Round(s)	665	1017	1143	1078	1036	1002	836	6777

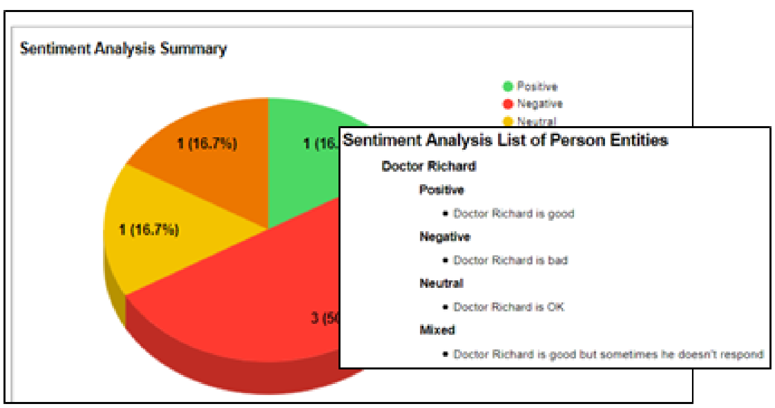
Care Rounds Sentiment Analysis

This report provides a breakdown of the percentage (and number) of comments that are categorized as either positive, negative, neutral, or mixed.

The report will break out the comments by a person entity if a name was included. It will then break the comments by question class or question.

Sentiment analysis is the process of identifying and categorizing opinions recorded in Care Rounds comments. Artificial intelligence and machine learning from Amazon Comprehend examine the comments to determine whether the patient's attitude (sentiment) towards areas of their experience is positive, negative, neutral or mixed.

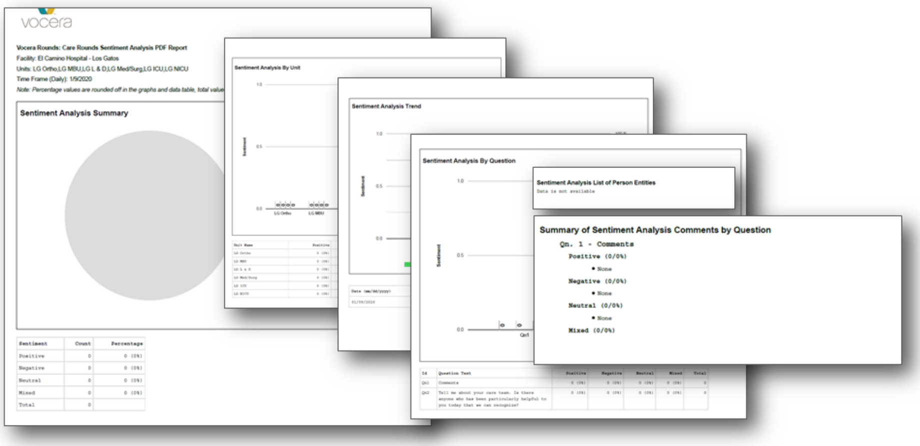
Care Rounds Sentiment Analysis is a PDF report as shown here.



The following details apply to the Sentiment Analysis report:

- Choose up to 10 units
- Choose up to 10 questions
- Choose Daily/Weekly/Monthly delivery

- Graphical Sentiment Analysis Summary
- Sentiment Analysis Person Entity Recognition
- Summary of Sentiment Analysis Comments by question



Care Rounds Completed By Rounder

This review by unit presents the type of rounds completed by each rounder, as well as the number of rounds completed, and the percentage of the rounds that were completed by the rounder.

This report is often used by hospitals who set rounding goals for each rounder.

Completed Rounds by Rounder is a CSV report as shown here.

Vocera Rounds: Care Rounds Completed By Rounder							
Facility: Western National Medical Center							
Units: Summit 3 ,Summit 4 East, Summit 4 West, Summit 5, Summit 6							
Time Frame (Weekly): 12/29/2019 to 1/4/2020							
Date	Round Type	Rounder Name	Facility Name	Unit Name	# of Completed Rounds by User	# of Completed Rounds by Unit	% of Completed Rounds by User per Unit
12/29/2019	Care Round	Virginia Z.	Western Nation	Summit 5	7	7	100
12/29/2019	Care Round	Marlena I.	Western Nation	Summit 4 Wes	5	5	100
12/29/2019	Care Round	Amanda A.	Western Nation	Summit 5	1	1	100
12/29/2019	Care Round	Amanda A.	Western Nation	Summit 6	4	4	100
12/30/2019	Care Round	Anne B.	Western Nation	Summit 5	2	8	25
12/30/2019	Care Round	Kathleen G.	Western Nation	Summit 3	3	8	38
12/30/2019	Care Round	Virginia Z.	Western Nation	Summit 3	3	8	38
12/30/2019	Care Round	Jeffrey L.	Western Nation	Summit 4 East	3	3	100
12/30/2019	Care Round	Jeffrey L.	Western Nation	Summit 4 Wes	10	10	100
12/30/2019	Care Round	Kathleen G.	Western Nation	Summit 5	10	38	26
12/30/2019	Environmental Sei	Jenna E.	Western Nation	Summit 5	4	38	11
12/30/2019	Food & Nutrition	Jenna E.	Western Nation	Summit 5	5	38	13

Care Rounds - All Responses By Round

This report displays all the questions and responses for Care Rounds by the round number.

The report displays all of the questions, as well as the comments for each question.

Care Rounds All Responses by Round is a CSV report as shown here.

	Vocera Rounds: Care Rounds						
1	- All Responses By Round						
2	Facilities: All Facilities						
3	Units: All Units						
4	Time Frame (Monthly): 2/1/2019 to 2/28/2019						
5							
6	Round Number	Rounded Date	Unit	Patient MRN	Rounded By	Round Type	Do you underst
7	1817642	2/1/2019 1:08	O_5WEST	692774	Annmarie Kennedy	Care Rounds	
8	1817643	2/1/2019 1:09	O_5WEST	275737	Annmarie Kennedy	Care Rounds	
9	1817644	2/1/2019 1:11	O_5WEST	295128	Annmarie Kennedy	Care Rounds	
10	1817645	2/1/2019 3:27	O_5SOUTH	378152	Michele Hayes	Care Rounds	
11	1817646	2/1/2019 3:27	OB_MS 4	101690673	Eileen Eloe	Care Round	

Percentage of Discharged Patients Who Received at least a Round(s) during LOS

A trended graph displays the percentage of patients who received at least one round during their stay (LOS) prior to being discharged.

Similar to the Percentage of Patients Receiving a Round(s) report, except that this report covers all units that the patient visited during this stay, and not just the discharge unit.

Patients are identified by their unique visit number, and will be counted in the unit from which they were discharged and a round was performed.

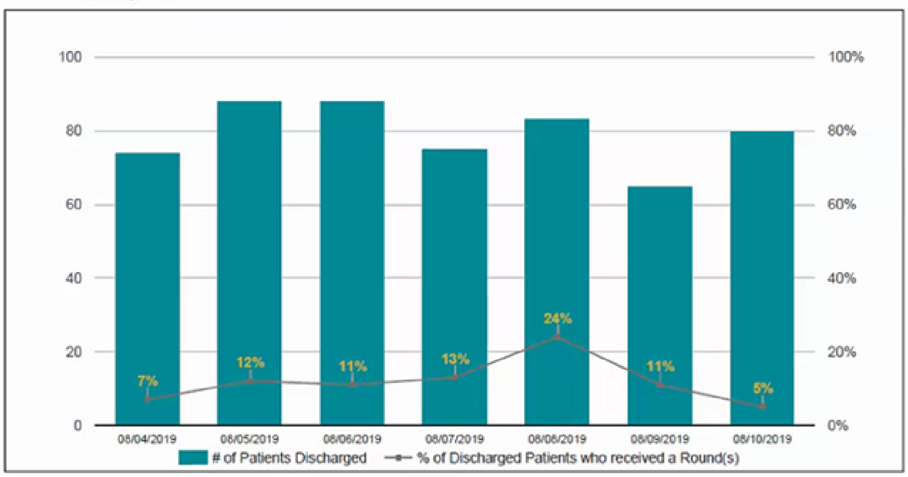
Percentage of Discharged Patients who Received at least a Round(s) during LOS is a PDF report as shown here.

Vocera Rounds: Percentage of Discharged Patients Who Received at least a Round(s) during LOS

Facility: **Northern Hills**

Units: All Units

Time Frame (Weekly): 8/4/2019 to 8/10/2019



	08/04/2019	08/05/2019	08/06/2019	08/07/2019	08/08/2019	08/09/2019	08/10/2019	Summary
% of Discharged Patients who received a Round(s)	7%	12%	11%	13%	24%	11%	5%	12.1 %
# of Patients Discharged	74	88	88	75	83	65	80	553
# of Discharged Patients who received a Round(s)	5	11	10	10	20	7	4	67

Staff Rounds Question Class

View the survey question, question class, and the details around the response rates and percentages in this report.

This Question Class report breaks down the Staff Rounds data by the selected answers. Questions are grouped, or broken into classes, to easily compare the similar responses. The format of this report allows for easy sorting and filtering for a specific question, or class.

Staff Rounds Question Class is a CSV report as shown here.

	A	B	C	D	E	F	G	H	I	J
1	Vocera Rounds: Staff Rounds Question Class									
2	Facilities: All Facilities									
3	Units: All Units									
4	Time Frame (Daily): 4/20/2020									
5										
6	Question Class	Round Type	Facility	Unit	Department	Survey Question	Selected Answer	# of Survey Question Class Answered	Total Count of Survey Question Class Answered	% of Total Rounds Answered This Way
7	SR_Emergency_Cord	EVS	North West	Med/Surg	AmbU	Is the Emergency Pull Cord unwrapped?	N/A	3	4	75.00%
8	SR_Any_Followup	Staff Round	South East	Team	NICU	Are there follow-up items?	No	2	2	100.00%
9	SR_Bathrooms_Stocked	EVS	Central	Psych	CC	Were bathrooms fully stocked?	N/A	2	3	66.67%
10	SR_Biohazard_Waste_Removed	EVS	Main	ICU	EVS	Was Biohazard waste removed?	N/A	1	1	100.00%

Staff Rounds Completed By Rounder

In the Staff Rounds module, view the type of rounds completed by each rounder, as well as the number of rounds completed, and the percentage of the rounds that were completed by the rounder.

This report is often used by hospitals who set rounding goals for each rounder.

Staff Rounds Completed by Rounder is a CSV report as shown here.

	A	B	C	D	E	F	G	H	I
2	Facilities: All Facilities								
3	Units: All Units								
4	Time Frame (Daily): 6/15/2020								
5									
6	Date	Round Type	Rounder Name	Facility Name	Unit Name	Department	# of Completed Rounds by User	# of Completed Rounds by Department	% of Completed Rounds by User per Department
7	6/15/2020	Nursing Team Round	Emily Locke	Central UMC	2 Main	Nurse	4	4	100%
8	6/15/2020	Quality Audit Round	James Martin	Central UMC	5 West	Nurse	2	3	67%
9	6/15/2020	Nursing Team Round	Abigail Odell	NorthWest	2 Main	Nursing Assist	1	1	100%
10	6/15/2020	TX Event Tracking	Emily Locke	Central UMC	2 Main	Patient Exp	1	1	100%
11	6/15/2020	Quality Audit Round	Joey Bloch	Eastern UMC	3 East	Nurse	4	4	100%
12	6/15/2020	Nurse Leader Round	Pat Brown	Eastern UMC	5 West	Nurse	1	1	100%
13	6/15/2020	Quality Audit Round	John Jones	Green Center	3 North	Nurse	10	10	100%
14	6/15/2020	TX Event Tracking	Brenda Right	Eastern UMC	4 South	Patient Exp	1	1	100%
15	6/15/2020	Quality Audit Round	Mary Jones	NorthWest	5 West	Nurse	1	3	33%
16	6/15/2020	Nurse Leader Round	Karen Smith	NorthWest	1 ICU	Nurse	9	14	64%
17	6/15/2020	TX Event Tracking	Mark Luther	Green Center	4 South	Patient Exp	1	1	100%

Care Rounds - Number of Rounds Completed By Location

A bar chart displays the number of rounds completed in the selected Facilities or Units, and identifies the goal maximum established for each location.

This report is delivered by email to the selected recipients in a PDF output. Reports may be defined for daily, weekly, monthly, quarterly, or yearly results, and a goal value may be established for each location selected in the report.

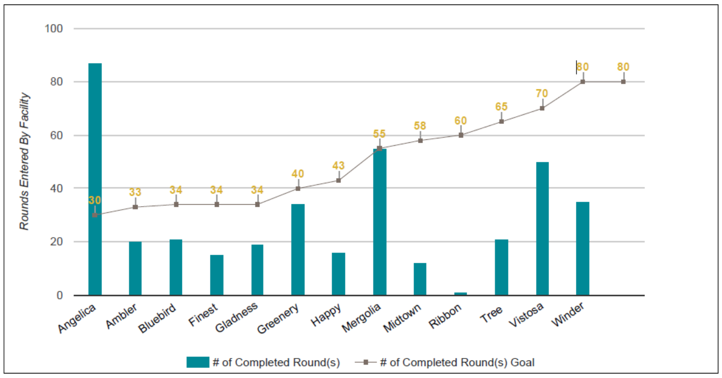
Note: For best results, please configure your report subscriptions for fewer than 10 round types. More than 10 round types may be difficult to interpret in the report output.

The report output displays location names on the horizontal axis, and the number of rounds on the vertical axis. The completed round goals are charted as a black line across the locations, with the goal value displayed on each location's bar.

Below the bar chart a table shows the number of rounds completed for each location. Below this row, the goal metric for each location is shown as a numerical value.

Care Rounds - Number of Rounds Completed by Location is a PDF report as shown here. In this example, you can see that the Mergolia location met the goal of 55 completed rounds in the selected week.

Vocera Rounds: Care Rounds - Number of Rounds Completed by Location
Facilities:
Angelica,Ambler,Bluebird,Finest,Gladness,Greenery,Happy,Mergolia,Midtown,Ribbon,Tree,Vistosa
Unit: All Units
Round Types: All
Time Frame (Weekly): 8/22/2021 to 8/28/2021



	Angelica	Ambler	Bluebird	Finest	Gladness	Greenery	Happy	Mergolia	Midtown	Ribbon	Tree	Vistosa	Winder	Default User Facility
# Of Completed Round(s)	87	20	21	15	19	34	16	55	12	1	21	50	35	0
# Of Completed Round(s) Goal	30	33	34	34	34	40	43	55	58	60	65	70	80	80

Staff Rounds - Number of Rounds Completed By Location

A bar chart displays the number of rounds completed in the selected Facilities or Departments, and identifies the goal maximum established for each location.

This report is delivered by email to the selected recipients in a PDF output. Reports may be defined for daily, weekly, monthly, quarterly, or yearly results, and a goal value may be established for each location selected in the report.

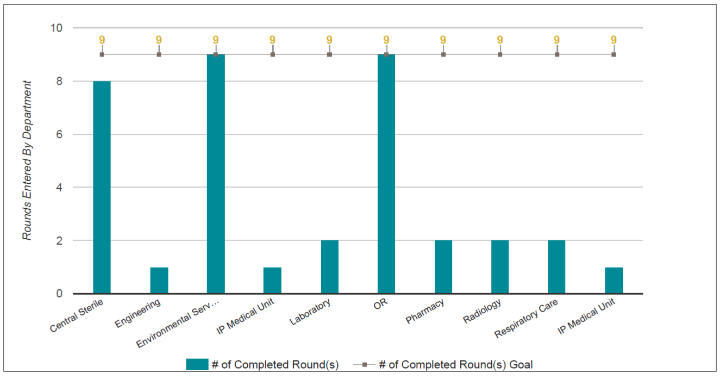
Note: For best results, please configure your report subscriptions for fewer than 10 round types. More than 10 round types may be difficult to interpret in the report output.

The report output displays location names on the horizontal axis, and the number of rounds on the vertical axis. The completed round goals are charted as a black line across the locations, with the goal value displayed on each location's bar.

Below the bar chart a table shows the number of rounds completed for each location. The second row in the table shows the goal metric as a numerical value for each location.

Staff Rounds - Number of Rounds Completed by Location is a PDF report as shown here. In this report, the goal of 9 completed rounds was met by the Environmental Services and OR units reported on in the selected month.

Vocera Rounds: Staff Rounds - Number of Rounds Completed by Location
Facility: Central
Departments: Central Sterile, Engineering, Environmental Services, IP Medical Unit, Laboratory, OR, Pharmacy, Radiology, Respiratory Care, IP Medical Unit
Round Types: All
Time Frame (Monthly): 8/1/2021 to 8/31/2021



	Central Sterile	Engineering	Environmental Services	IP Medical Unit	Laboratory	OR	Pharmacy	Radiology	Respiratory Care	IP Medical Unit
# Of Completed Round(s)	8	1	9	1	2	9	2	2	2	1
# Of Completed Round(s) Goal	9	9	9	9	9	9	9	9	9	9

Business Intelligence

Business Intelligence (BI) provides access to the rounding data stored in VCE databases. Data is organized into dashboard views that can be customized to reveal trending, as well as detail, information.

The software and analytics work in concert to capture the voice of the patient and make it readily available to care team members along the patient's journey.

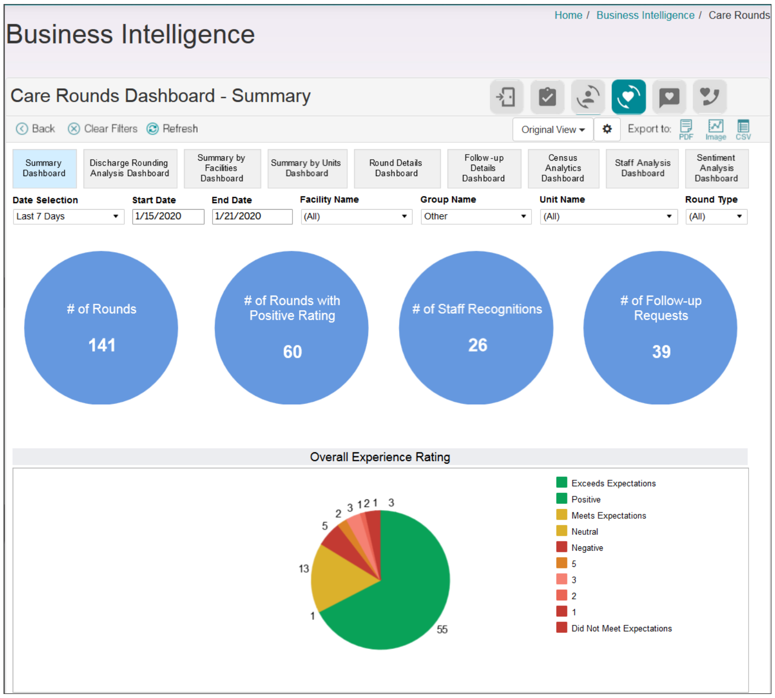
Dashboards allow you to view data in near real-time, and filter the data to identify views specific to your needs:

- Identify gaps and improve outcomes in managing the experience and quality of care per patient, by department, enterprise-wide, and across the care continuum through multi-dimensional analytics.
- Receive real-time data analysis, trends, and dashboards for managing patient experience and quality of care.
- Drill down to patient-level details to analyze and better understand the root causes of readmissions, patient dissatisfaction, and lost revenue.
- Analyze patient's experience throughout a service period, from prior stays, and across different facilities within a system.

Data views are also exportable to PDF, image, and CSV formats.

Note: The BI dashboards that display will depend on the modules you have been granted permission to work with.

The following displays an example of a BI dashboard in VCE.

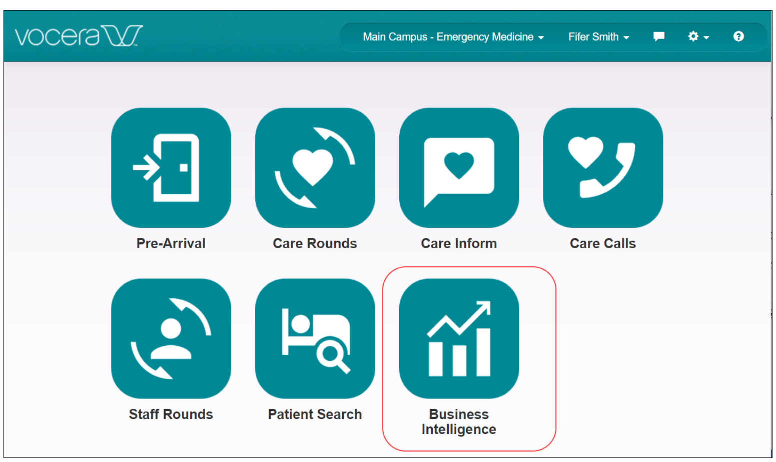


Accessing BI for Care Rounds

Navigate to the Business Intelligence module to view the real time data that has been sourced from your facility's Care Rounds surveys.

Access the BI module from the VCE Home page, or from the left navigation menu in any module.

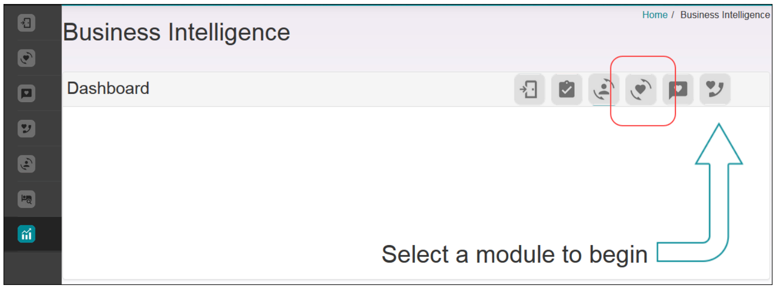
1. Select the **Business Intelligence** module in the Home page.



   The default Business Intelligence dashboard displays.

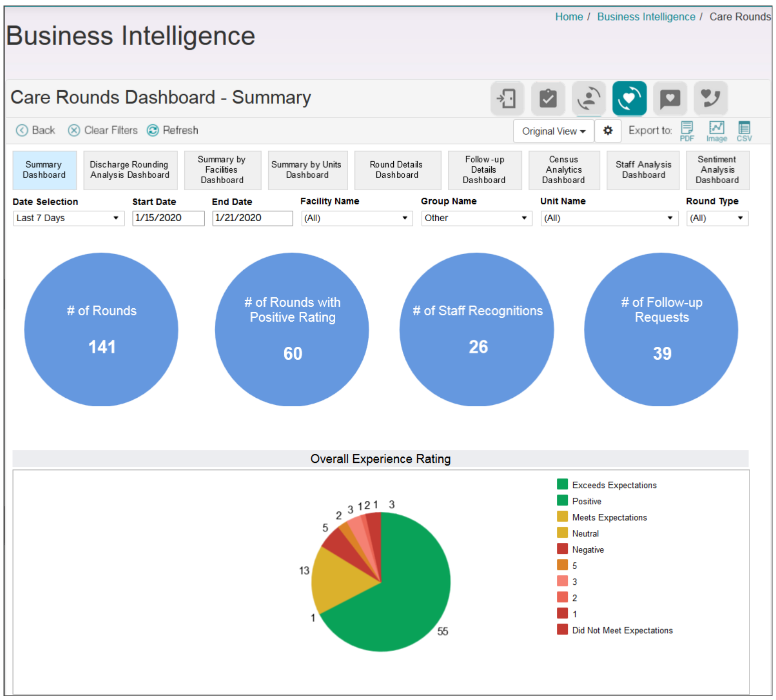
2. Select the Care Rounds module in the Business Intelligence dashboard menu.

Note: The BI dashboards that display will depend on the modules you have been granted permission to work with.



The default BI dashboard for the Care Rounds module displays.

3. View the dashboards provided for the Care Rounds module. In this example, the Summary dashboard displays by default.



4. Click a dashboard to access other data views for Care Rounds. For example, click the Discharge Rounding Analysis Dashboard to view rounding data on discharged patients.

   Refer to BI Dashboards on page 101 for information about the available dashboards.

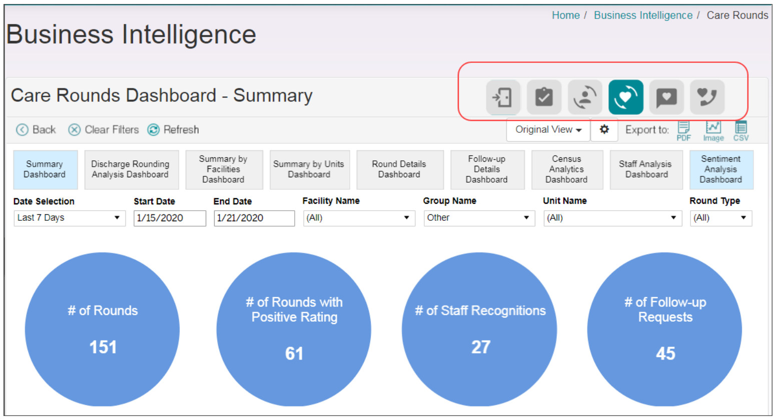
Next, use the tools to display the dashboard data that you need. For example, you might expand the Date Selection field from the "Last 7 Days" to the "Last 14 Days" selection to access more data in the Summary dashboard.

Navigating BI Menus and Tools

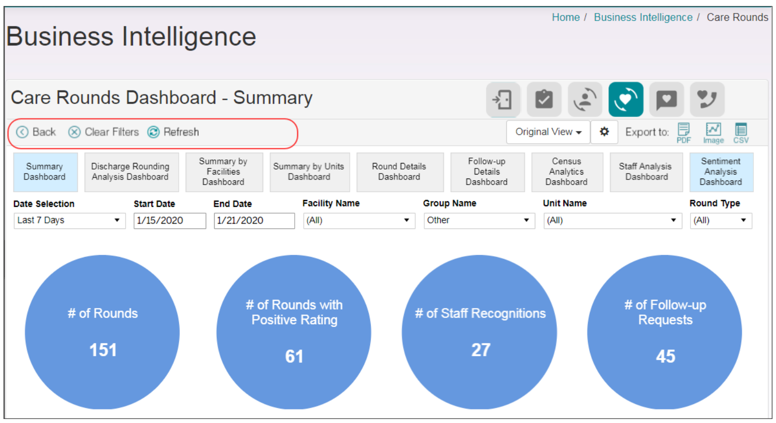
Use the menus and tools in Business Intelligence to display different data views.

The name of the currently viewed BI module dashboard displays on the left below the Business Intelligence title. In the example used on this page, the Care Rounds module is selected and displays the default dashboard; Summary.

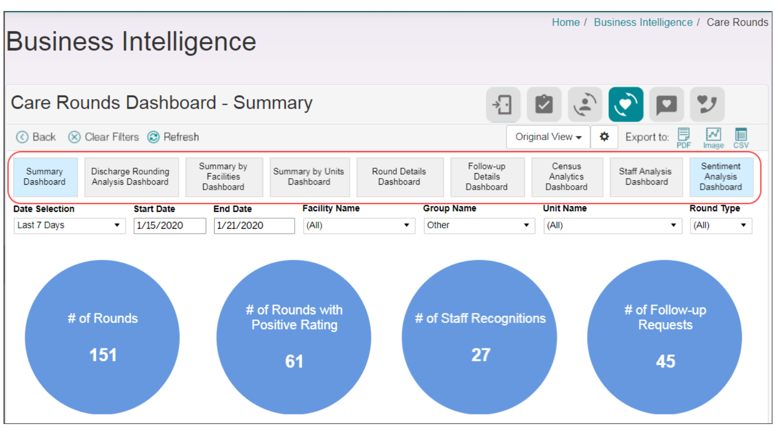
1. Select a module in the Business Intelligence menu.



2. Select an option in the toolbar to navigate back, to clear the filters you have been working with, or to refresh the data in your view.



3. Select a dashboard to view the predefined report data for the selected module.
   The dashboards shown here are available in the Care Rounds module. Refer to BI Dashboards on page 101 for details.



Next, you might want to work with filters and views to drill into VCE data, display a round survey to view those details, or export a static copy of a view.

Working with View Filters

Filters provided in the dashboard allow the BI data to be shown in various, customizable ways.

The available filters depend on the module and dashboard selected. In addition, data options displayed in a filter's drop down list, such as facilities or staff data, will depend upon the current account user's data access authorization.

By default, each of the filters are configured to show all data for its respective filter. Use the filters as needed to specify the data you wish to be displayed in the chosen dashboard.

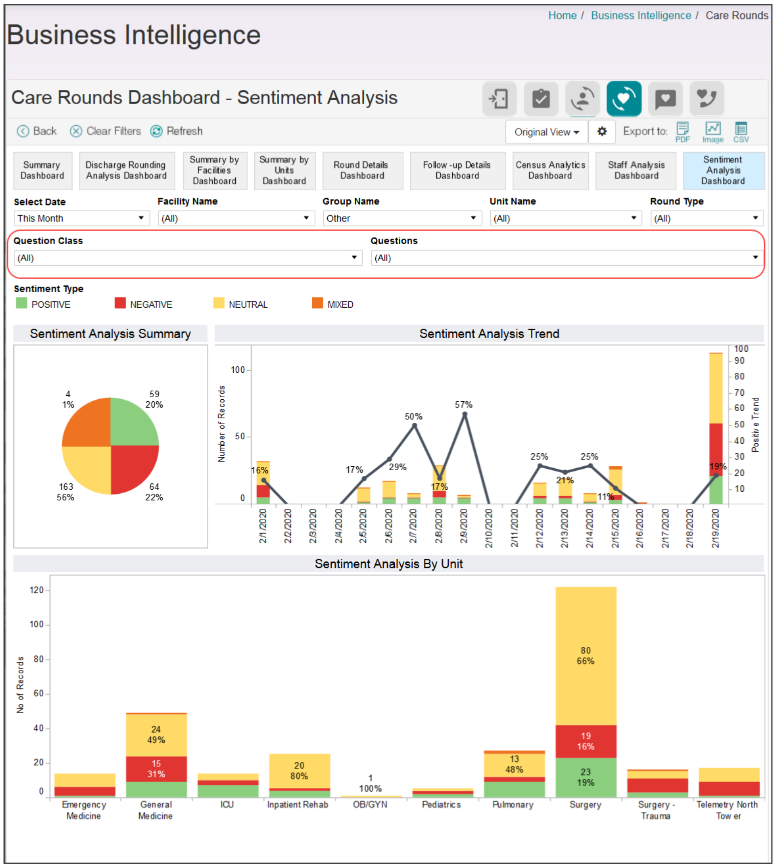
The Date Selection drop down menu allows you to select the timeframe that the module should use for displaying procedure data. Timeframe options are:

- Today
- Yesterday
- Last 7 Days
- Last 14 Days
- This Week
- Previous Week
- This Month
- Previous Month
- Custom: Allows you to manually configure the timeframe using the Start Date and End Date calendars next to the Date Selection menu.

Additional filters found in the dashboards are provided to specify data such as facility, group, unit, or round type. Refer to BI Dashboards on page 101 for information about the Care Rounds filters.

1. Navigate to the dashboard you want to work with in a BI module.
   The Care Rounds dashboards display in this example.
2. Identify the filters in the toolbar used to change the data displayed in your view.
   For example, you might choose a particular facility or unit on which to focus your data view.

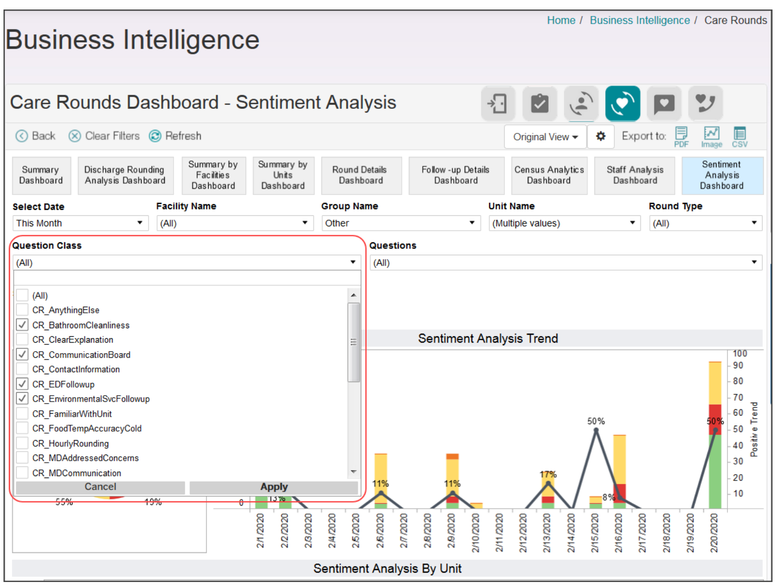
3. Click a filter to display the dropdown list.
   For example, the Sentiment Analysis dashboard displays Question Class and Questions filters. Click the Questions filter to display the list of questions used in rounding surveys.



The filter's list of items displays, such as all survey question classes.

4. Select the items you wish to work with, and click **Apply**.

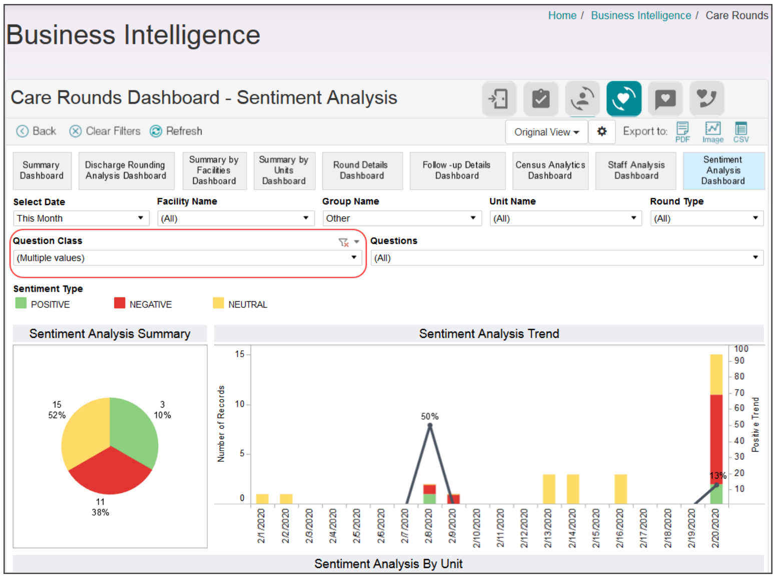
   De-select All in order to select the items you need. Select All to display the full set of data.



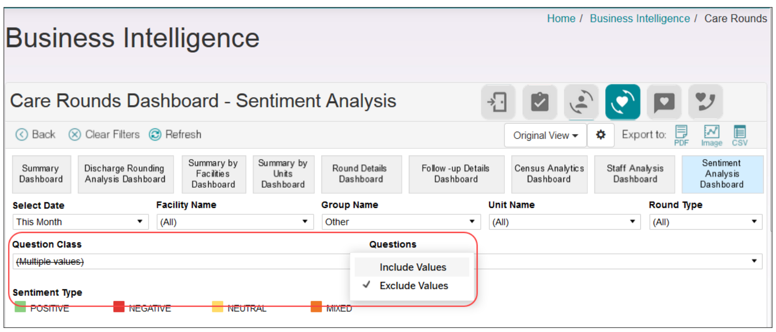
The data updates to display the requested view.

5. Click the Include/Exclude icon in the filter displaying Multiple Views.

   Click the funnel icon to show all values again. Click the arrow to display the Include and Exclude options.

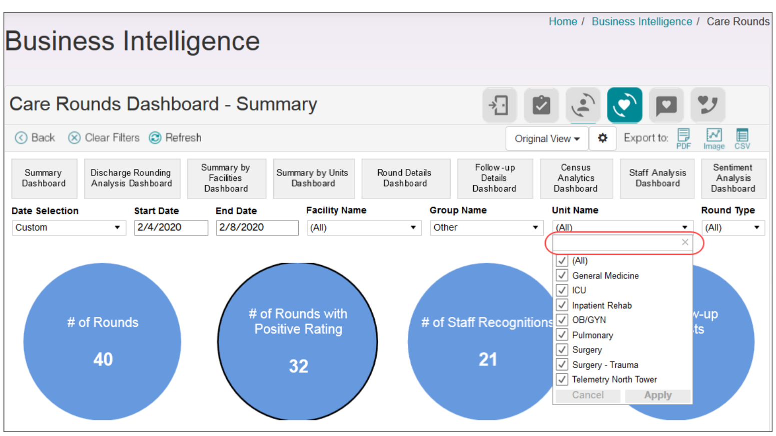


6. Select **Include Values** or **Exclude Values** to apply to the current items selected in the filter.
   In this example, the multiple items selected in the Question Class filter will be excluded from the data display.



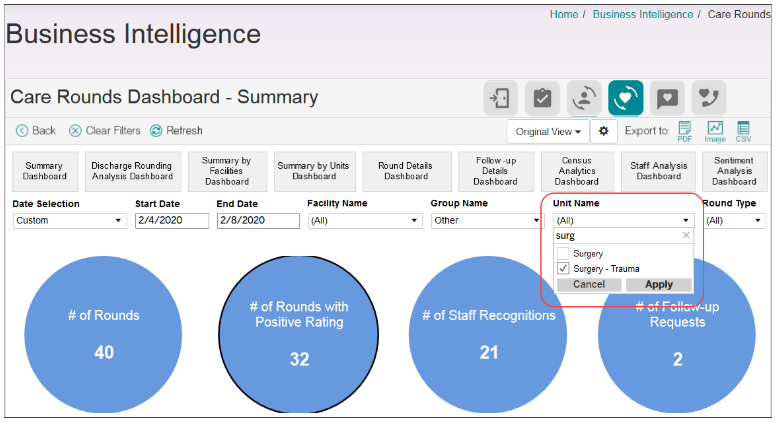
The data display updates to exclude (or include) the selected filtering items.

7. Enter a search term in the field provided for long dropdown lists.
   Use the dropdown lists in the displayed filters to select the parameters you wish to view. For example, you can select a unit from the list of all units you are authorized to work with.



The list updates as you type in the field, displaying the items that match the entered text.

8. Select an item in the search list and click **Apply**.
   When no items are selected in the filter, the data display will be empty.



The data updates to display the requested view.

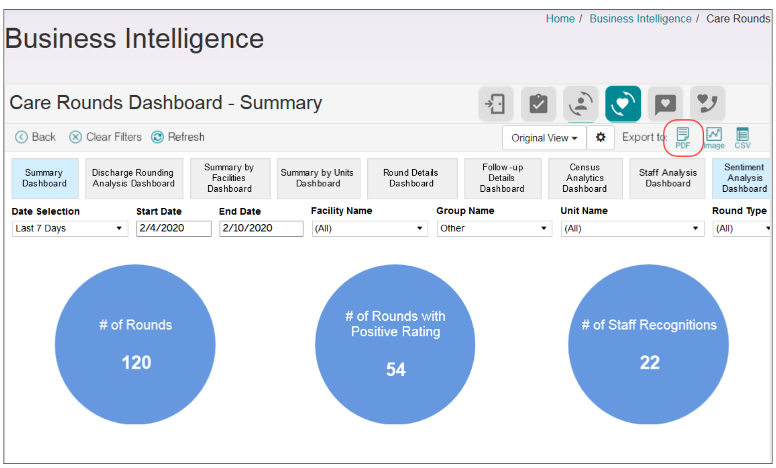
Exporting a BI View

You can create a PDF, Image (PNG), or CSV export file containing a copy of the VCE dashboard display, and download it to your local file store.

Exporting a PDF Copy

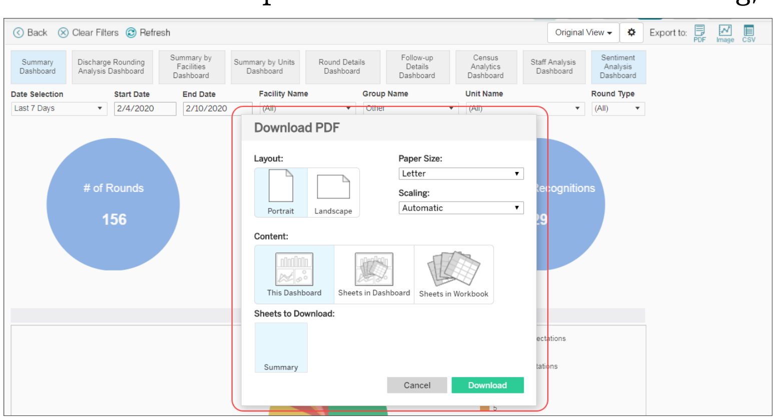
Generate a PDF copy of the current dashboard for storage.

1. Select the **PDF** export option in the dashboard toolbar.



The Download PDF dialog displays.

2. Edit the selection options in the **Download PDF** dialog, or use the default configuration settings.



3. Use the following table to understand the configuration settings in Download PDF.

Setting	Description
Paper Size	Select a paper size for the PDF copy of the selected dashboard. The Letter size is selected by default.
Scaling	Select a scale option for the PDF copy of the selected dashboard. The Automatic scale is selected by default.
Layout	Select Portrait or Landscape page layout for the copy of the selected dashboard. The Portrait layout is selected by default.
Content	Select the content to include in the PDF copy of the selected dashboard. This Dashboard content is selected by default. The following content options are provided: • This Dashboard • Sheets in Dashboard • Sheets in Workbook 'This Dashboard' provides a PDF of the information shown in the dashboard. For example, all results currently displayed in the page will display in this PDF. 'Sheets in Dashboard' provides a PDF of all pages in the selected module that are available in the selected dashboard. For example, all results in the Care Rounds Summary dashboard will display in this PDF. 'Sheets in Workbook' provides a PDF of all pages in all dashboards in the selected module. For example, while the Summary dashboard is selected, the results in all Care Rounds dashboards will display in this PDF.
Sheets to Download	Select the pages in the dashboard to include in the generated PDF. All are selected by default. This field displays the names of the pages in the dashboard (or workbook, when 'Sheets in Workbook' is selected in Content) that will display in the generated PDF.

4. Select one of the following in the Download PDF dialog.

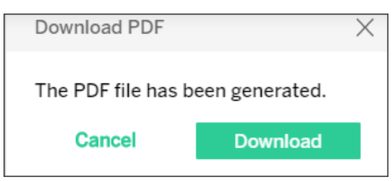
   In this example, select **Download PDF** to generate a PDF.

   - **Cancel**: Close the dialog without generating a PDF.
   - **Download**: Generate a PDF of your selections.

   The setting options are removed in the Download PDF dialog, and a results message displays.

5. Select one of the following:

   In this example, select **Download** in the Download PDF dialog to download the file to your local file store.

   Select one of the following to exit the Download PDF dialog.

   - **Cancel**: Close the dialog without downloading a PDF.
   - **Download**: Download a PDF of your selections.

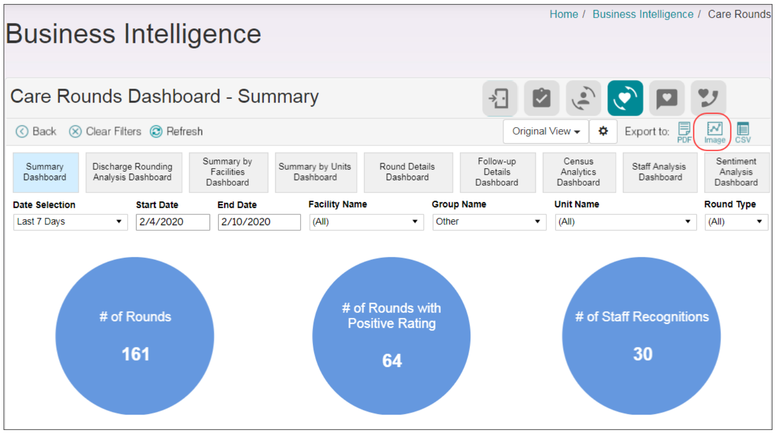
   The dialog closes, and the dashboard is visible again.

Finally, verify your export content is delivered in your local file store.

Exporting an Image Copy

Generate an image (PNG) copy of the current dashboard for storage.

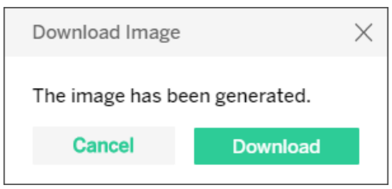
1. Select the **Image** export option in the toolbar to generate a .PNG file of the currently displayed dashboard data.



The Download Image dialog displays.

2. Select one of the following in the **Download Image** dialog.

   In this example, select **Download** in the Download Image dialog to download the file to your local file store.



Select one of the following to exit the Download Image dialog.

- **Cancel**: Close the dialog without downloading an image.
- **Download**: Download an image of your selections.

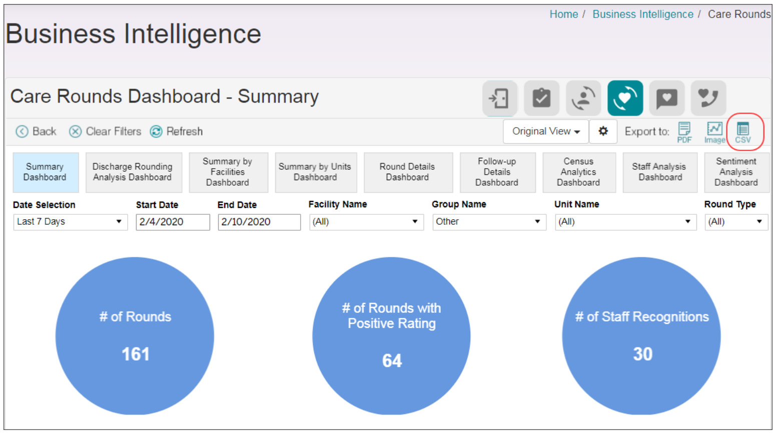
The dialog closes, and the dashboard is visible again.

Finally, verify your export content is delivered in your local file store.

Exporting a CSV Copy

Generate a comma separated value (CSV) copy of the current dashboard for storage.

1. Select the **CSV** export option in the toolbar to generate a CSV file of the currently displayed dashboard data.



The Download Crosstab dialog displays for the CSV file.

2. Select one of the following in the **Download Crosstab** dialog.

   In this example, select **Download** in the Download Crosstab dialog to download the file to your local file store.

   Select one of the following to exit the Download Crosstab dialog.

   - **Cancel**: Close the dialog without downloading a CSV file.
   - **Download**: Download a CSV file of your selections.

   The dialog closes, and the dashboard is visible again.

Finally, verify your export content is delivered in your local file store.

Using Custom Views

You can configure a dashboard with the set of filters that you want to re-visit regularly, and save it as a custom view for easy access to that data view in the future.

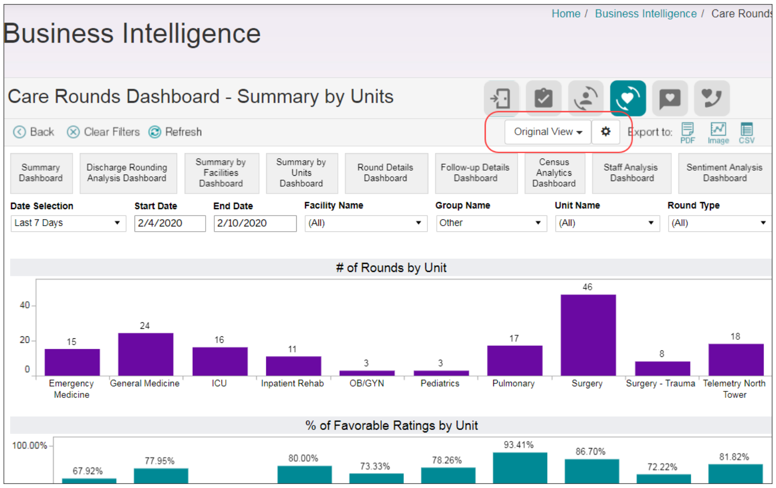
By default, VCE displays a summary dashboard for the module that you select to work with in BI. You can create custom views to quickly access the current data with the configurations you need in a dashboard. The custom view list includes the Original View, and any custom views that have been created. Once created, you can choose a custom view to display by default, or delete it from the system.

Creating a Custom View

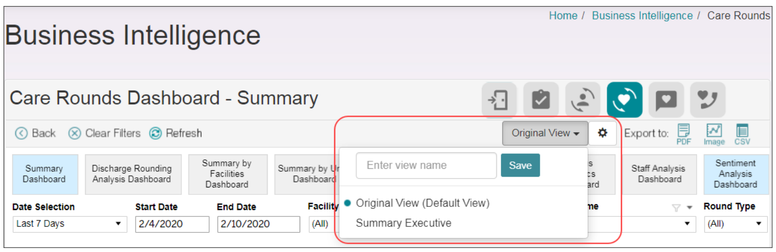
You can create a custom view to display the current BI data for the view you need.

Refer to Working with View Filters on page 87 for details about displaying data in BI dashboards.

1. Configure the dashboard and filters to display the data settings that you want to access in the future.
2. Click the **Original View** field in the toolbar.

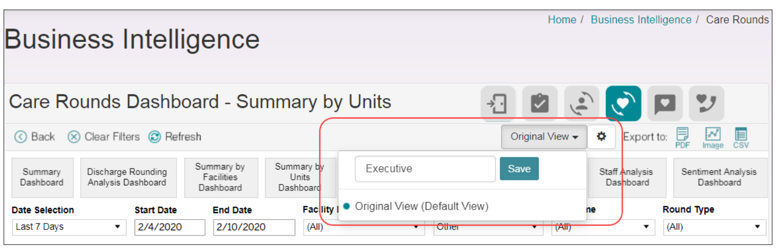


The custom view list displays.



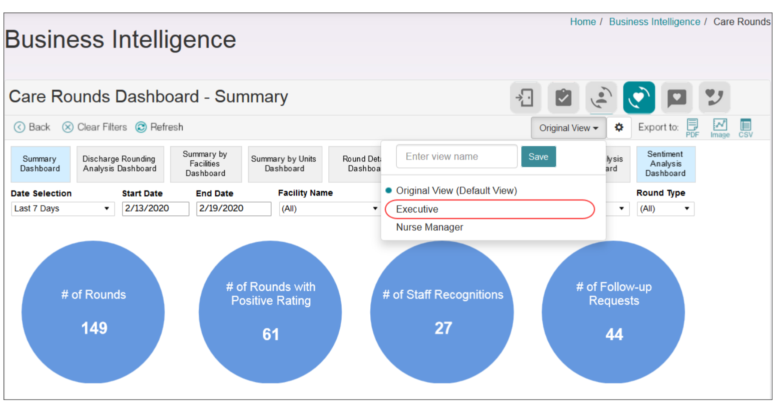
3. Type over the **Enter view name** text, entering the name of a view that you want to create, and select **Save** in the dialog.

   In this example, the filters set on the Summary by Units dashboard will be saved as a custom view named Executive.



   The new custom view is created.

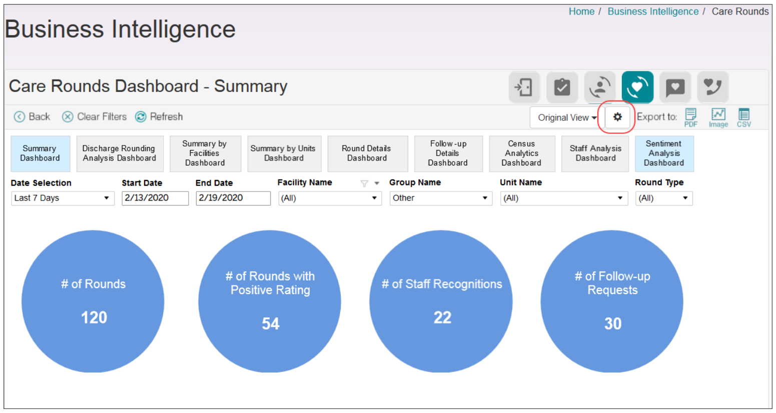
4. Verify the new custom view displays in the list.



Deleting a Custom View

You can delete a custom view from the system.

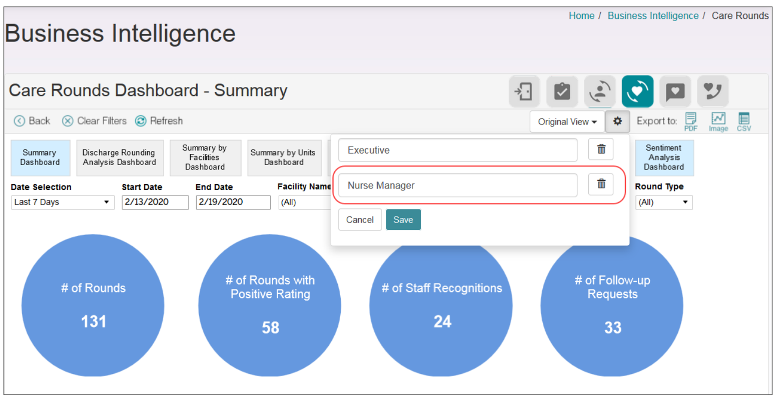
1. Click the gear icon in the custom view toolbar to select a view for deletion.



The list of custom views displays.

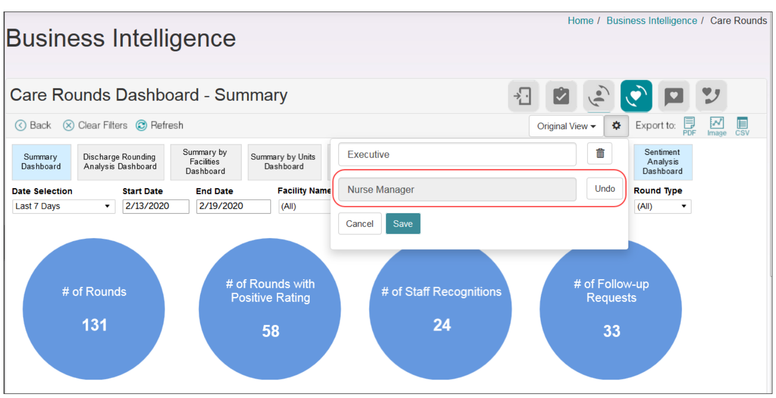
2. Click the trash barrel button for the custom view you wish to delete.

   Original View cannot be deleted from the system, but any custom view may be deleted.



The trash barrel changes to the word Undo.

3. Select one of the following to exit the dialog.



- **Cancel**: Close the dialog without deleting the view. A custom view marked for deletion will remain marked until the Undo option is selected (or Save is selected).
- **Save**: Confirm the deletion, and close the dialog. The custom view no longer displays in the list.

Next, you can create a custom view.

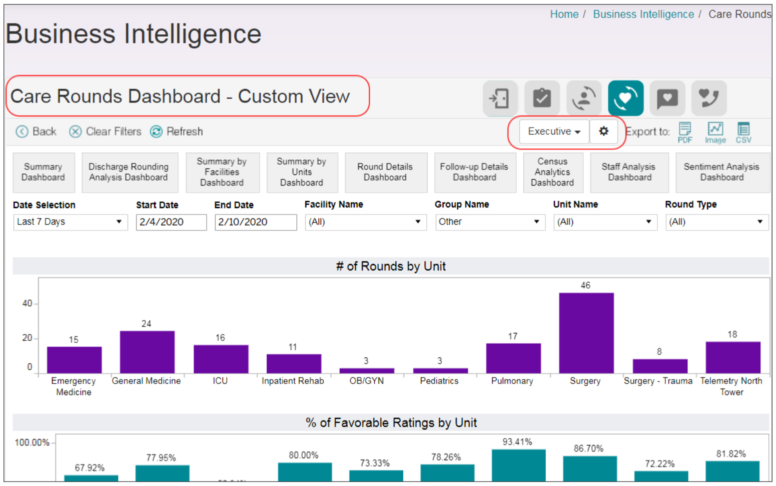
Choosing a Default View

You can select one custom view to display by default when you access BI.

Only one view can be selected to be the default, but you can easily make a different view the default, or display another custom view to quickly access the data you need.

1. Click a custom view in the list.

   In this example, select the Executive custom view.

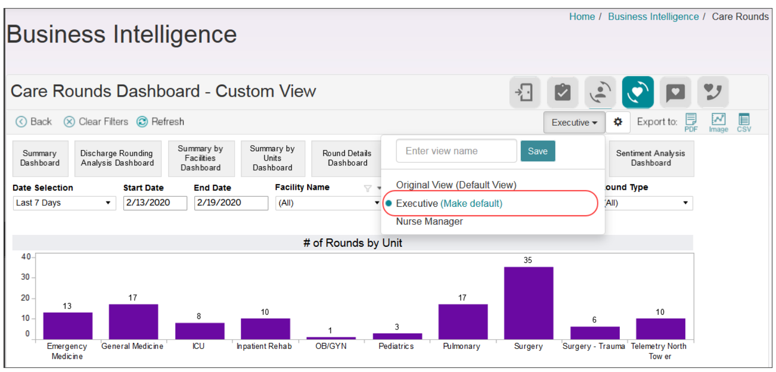
   

   The custom view displays the dashboard configured for the selected view.

2. Click the custom view name marked with **Make Default** in the list.

   The **Make Default** option displays in the custom view list only when that custom view is displayed in the window.

   In this example, the Executive custom view is displayed and can be made the default view.

   The selected custom view will now display each time the module is accessed in BI.

Accessing a Round's Details

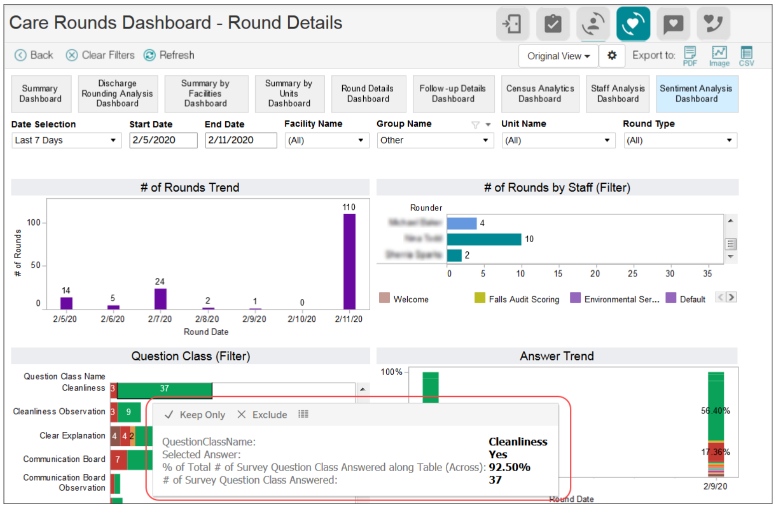
You can access the Details page for patient rounds reported in the graph, and a view-only copy of the round reported.

Data tables in a graph display a tooltip when you mouse over data. This tooltip displays the allows you to select to include or exclude the data from the visual display.

Note: Some dashboards do not provide the **View Data** option, such as Care Rounds - Discharge Rounding Analysis Dashboard, or Care Rounds - Sentiment Analysis Dashboard.

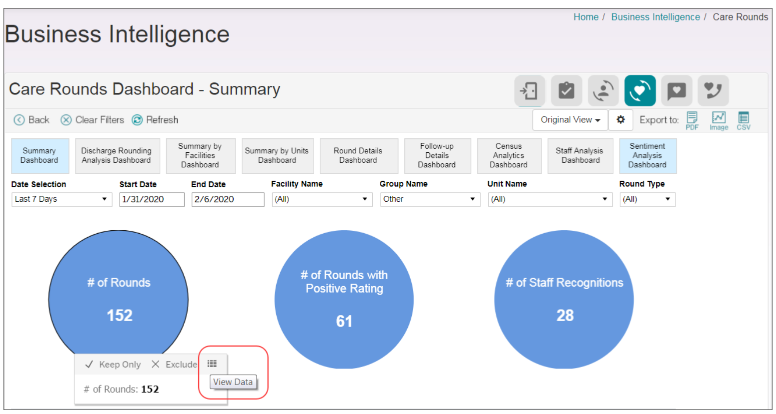
1. On any dashboard, mouse over a graph to display a tooltip with more information.

   In this example the tooltip displays the data for the Cleanliness question class in the Round details dashboard.



2. Select one of the following in the tooltip.
   - Select **Keep Only** to remove the other data points from the graph.
   - Select **Exclude** to remove the current data point from the graph.
   - Select the **More Information** icon to display the View Data option.

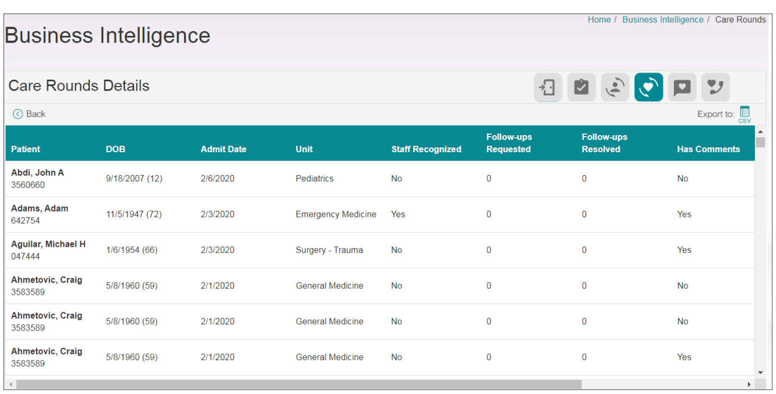
   Refresh the browser to clear the selected filtering from the page. (The toolbar's Refresh option will re-display the filtered data.)
3. Click **View Data** in the tooltip.



The Details grid displays.

4. View the information provided in the module's **Details** grid.

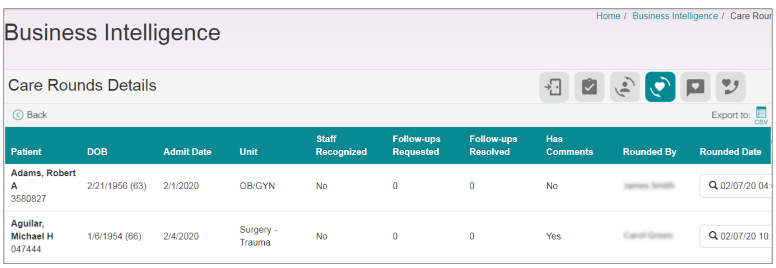
   The Details grid displays sortable columns. Use the scroll bars to access columns and rows not shown in the window.



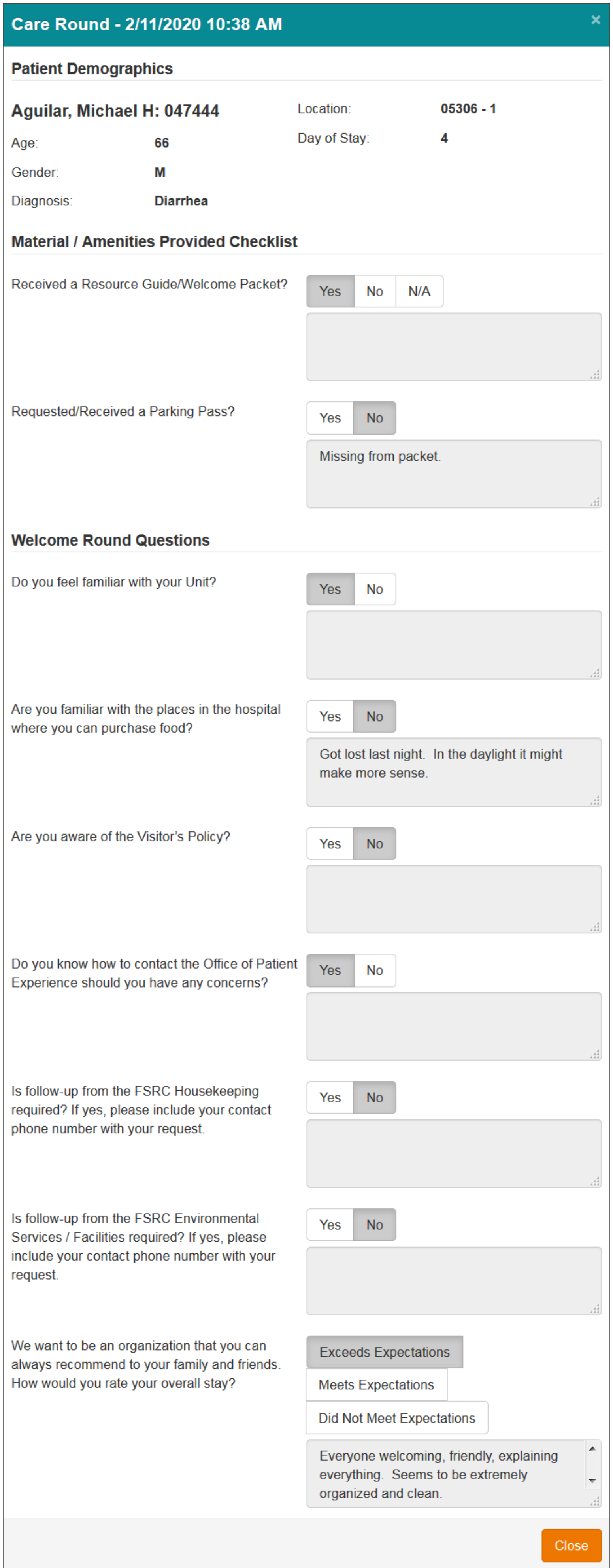
5. Use the following table to understand the information provided in the Details grid.

Setting	Description
Patient	Identifies the patient name.
DOB	Identifies the patient date of birth, and age in years.
Admit Date	Identifies the patient date of admission to the facility.
Unit	Identifies the unit where the patient was admitted at the time of the report.
Staff Recognized	Displays a Yes or No value to indicate whether staff was recognized.
Follow-ups Requested	Displays the count of times a follow-up has been requested for the patient.
Follow-ups Resolved	Displays the count of times a follow-up has been resolved for the patient.
Has Comments	Displays a Yes or No value to indicate whether comments were reported.
Rounded By	Displays the name of the staff who completed the round on the patient.
Rounded Date	Displays the date and time when the round was recorded. This is also a clickable link to view the completed round survey.

6. Click the icon in the **Rounded Date** column to view the survey that was completed in the round.



The completed survey displays for review as shown in this example; this document is view-only.


Care Round - 2/11/2020 10:38 AM
Patient Demographics
Aguilar, Michael H: 047444
Location: 05306 - 1
Day of Stay: 4
Age: 66
Gender: M
Diagnosis: Diarrhea
Material / Amenities Provided Checklist
Received a Resource Guide/Welcome Packet?
Yes No N/A
Requested/Received a Parking Pass?
Yes No
Missing from packet.
Welcome Round Questions
Do you feel familiar with your Unit?
Yes No
Are you familiar with the places in the hospital where you can purchase food?
Yes No
Got lost last night. In the daylight it might make more sense.
Are you aware of the Visitor's Policy?
Yes No
Do you know how to contact the Office of Patient Experience should you have any concerns?
Yes No
Is follow-up from the FSRC Housekeeping required? If yes, please include your contact phone number with your request.
Yes No
Is follow-up from the FSRC Environmental Services / Facilities required? If yes, please include your contact phone number with your request.
Yes No
We want to be an organization that you can always recommend to your family and friends. How would you rate your overall stay?
Exceeds Expectations
Meets Expectations
Did Not Meet Expectations
Everyone welcoming, friendly, explaining everything. Seems to be extremely organized and clean.
Close

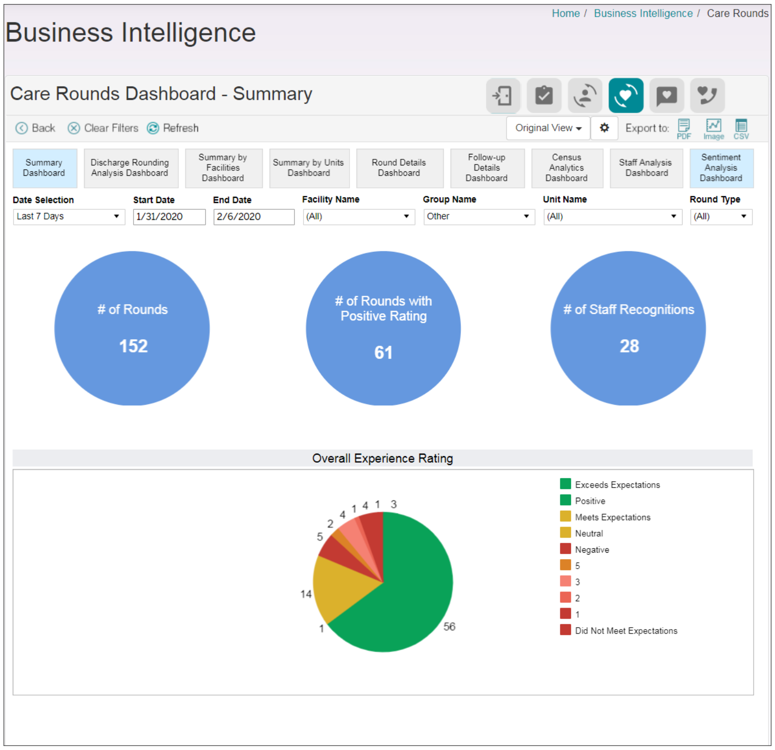
BI Dashboards

Understanding the Care Rounds Business Intelligence dashboards provided in the VCE application.

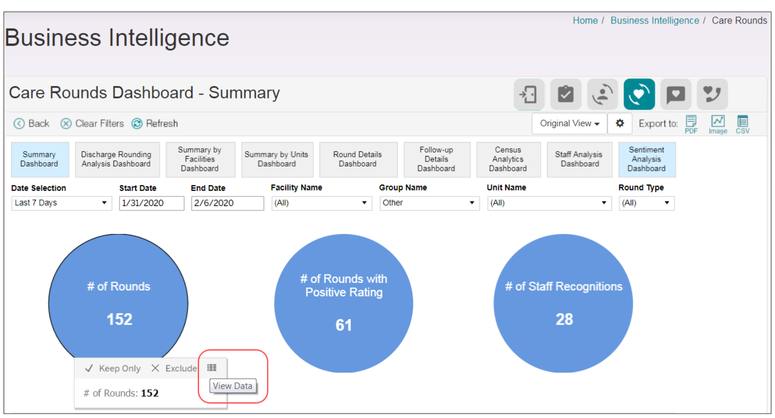
Care Rounds Summary Dashboard

The Summary dashboard displays visualized data on the number of total rounds, positively rated rounds, and staff recognitions.

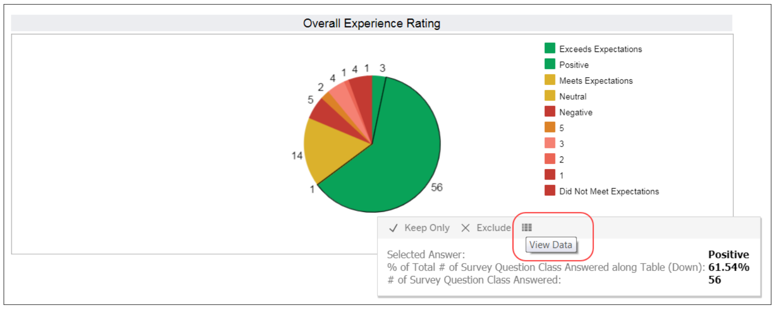
The Summary dashboard also displays a distribution of the overall experience rating from each recorded round.



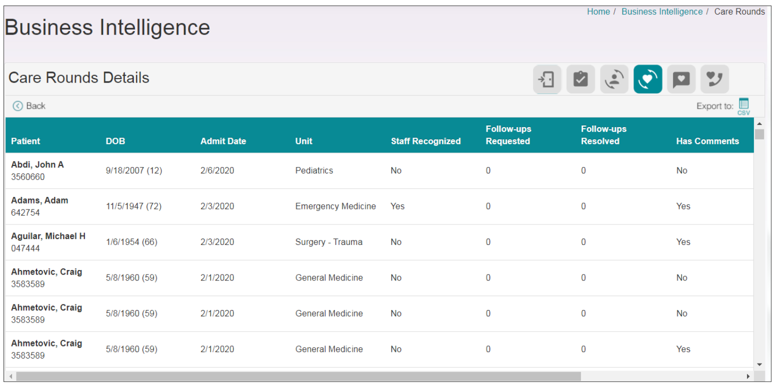
The blue circular icons at the top specify the total rounds, positively rated rounds, and staff recognitions with more detail. Selecting an icon, and then selecting the 'View Data' icon in the tooltip provides access to more information for each category. For example, select the '# of Rounds' icon to display the tooltip and access more data in the Care Rounds Details page.



The Overall Experience Rating icon also provides a tooltip for each category which displays the Care Rounds Details page for the selected data.



The Care Rounds Details page in BI provides additional data about individual care rounds including the patient, department, unit, recognition and follow up information, as well as the staff rounder and round time. Select 'Back' in the upper left-hand corner to go back to the main dashboard. Use the window's scroll bars to display all columns and rows.



Patient	DOB	Admit Date	Unit	Staff Recognized	Follow-ups Requested	Follow-ups Resolved	Has Comments
Abdi, John A 3560660	9/18/2007 (12)	2/6/2020	Pediatrics	No	0	0	No
Adams, Adam 642754	11/5/1947 (72)	2/3/2020	Emergency Medicine	Yes	0	0	Yes
Aguilar, Michael H 047444	1/6/1954 (66)	2/3/2020	Surgery - Trauma	No	0	0	Yes
Ahmetovic, Craig 3583589	5/8/1960 (59)	2/1/2020	General Medicine	No	0	0	No
Ahmetovic, Craig 3583589	5/8/1960 (59)	2/1/2020	General Medicine	No	0	0	No
Ahmetovic, Craig 3583589	5/8/1960 (59)	2/1/2020	General Medicine	No	0	0	Yes

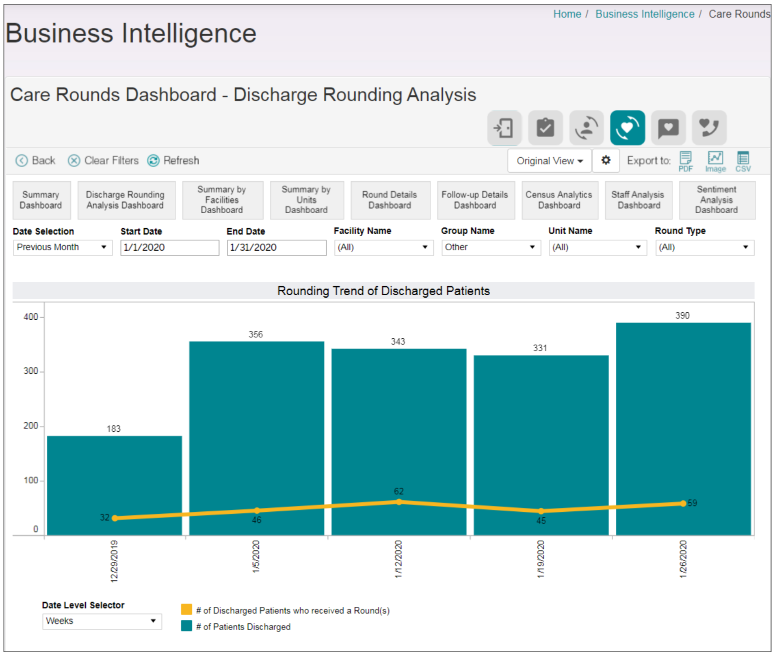
Discharge Rounding Analysis Dashboard

The Discharge Rounding Analysis dashboard displays visualized data on the rounding trends of discharged patients.

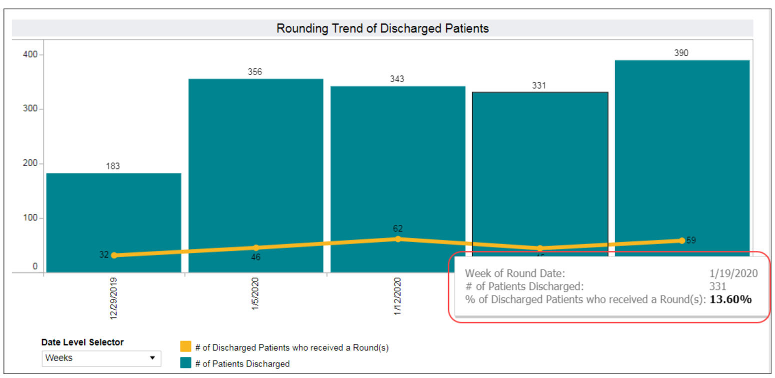
A bar graph represents the total number of patients discharged on a given day, with an overlapping line graph representing how many discharged patients also received a round.

When a patient has a Care Round completed during their stay, but the patient is then discharged from a different unit than the unit where they were rounded on, then Null displays for the discharging unit in the Round Type filter. Null in this case indicates that the patient was not rounded on in the discharging unit, but that there was a round performed. The data is accurate, and all rounds and discharges are counted in the Rounding Trend of Discharged Patients graph. The Null label could more accurately indicate "Other unit rounded".

This data can be viewed at the level of weeks, months, or quarters by selecting the desired option in the Date Level Selector in the bottom left corner.



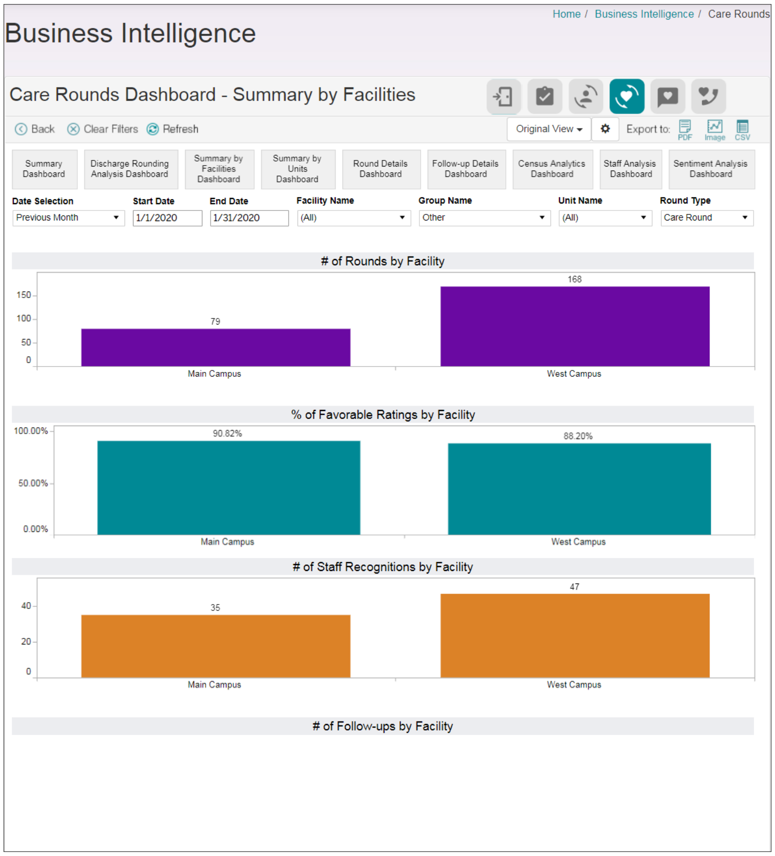
Mouse over the graphs to view the numerical explanation in a tooltip.



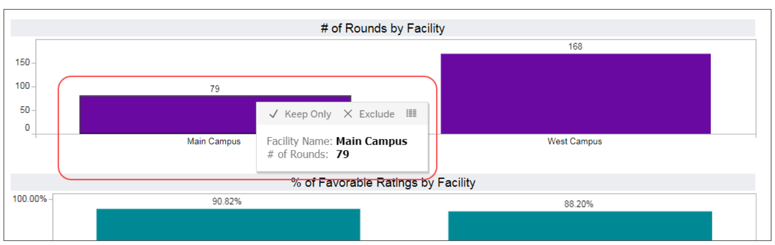
Summary by Facilities Dashboard

The Summary by Facilities dashboard provides a visual representation of the facility's total rounds, percentage of favorable ratings, total staff recognitions, and total follow-ups.

The data is organized by each facility with separate bar graphs for each category of data. If no data exists for a given category, a graph will not appear (as in the example below with # of Follow-ups).



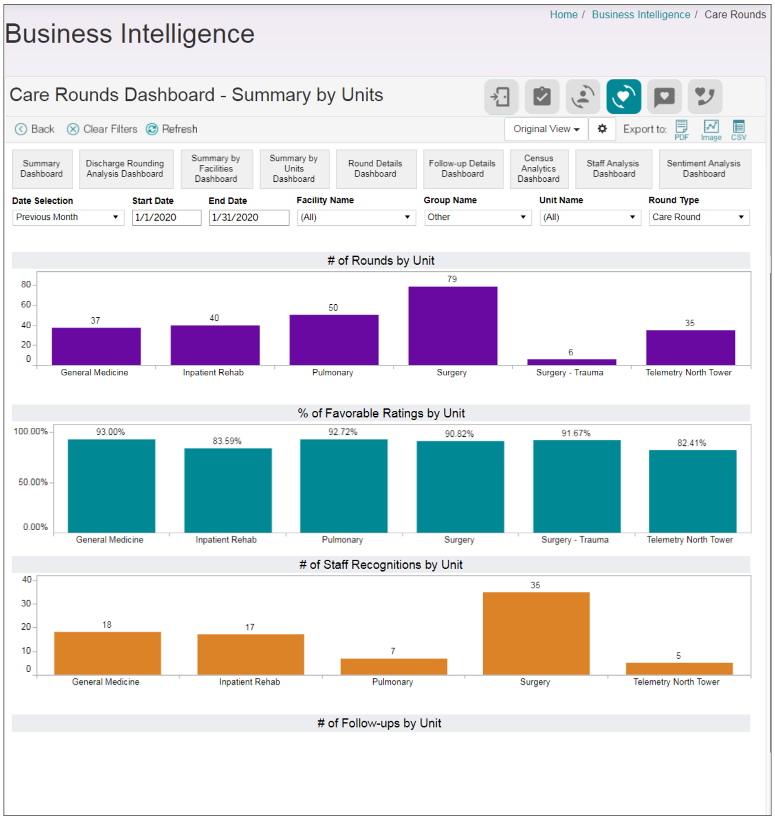
Mouse over the graphs to view the numerical explanation in a tooltip.



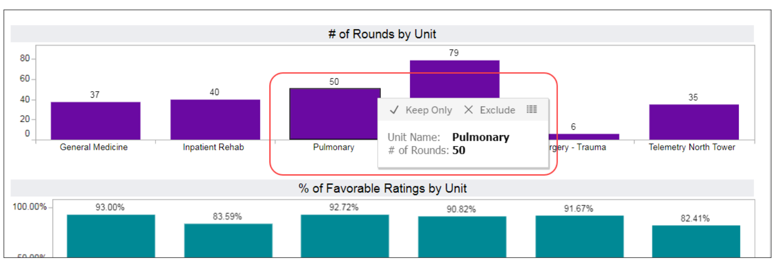
Summary by Units Dashboard

The Summary by Units dashboard provides a visual representation of the facility's total rounds, percentage of favorable ratings, total staff recognitions, and total follow-ups.

The data is organized by each unit (instead of facility) with separate bar graphs for each category of data. If no data exists for a given category, a graph will not appear (as in the example below with # of Follow-ups by Unit).



Mouse over the graphs to view the numerical explanation in a tooltip.



Round Details Dashboard

The Round Details Dashboard displays more specific trending data about the rounds made within the facility. The displayed data includes the number of rounds trend, the number of rounds by individual staff, question class information, answering trends, and the comments made from submitted follow-ups.

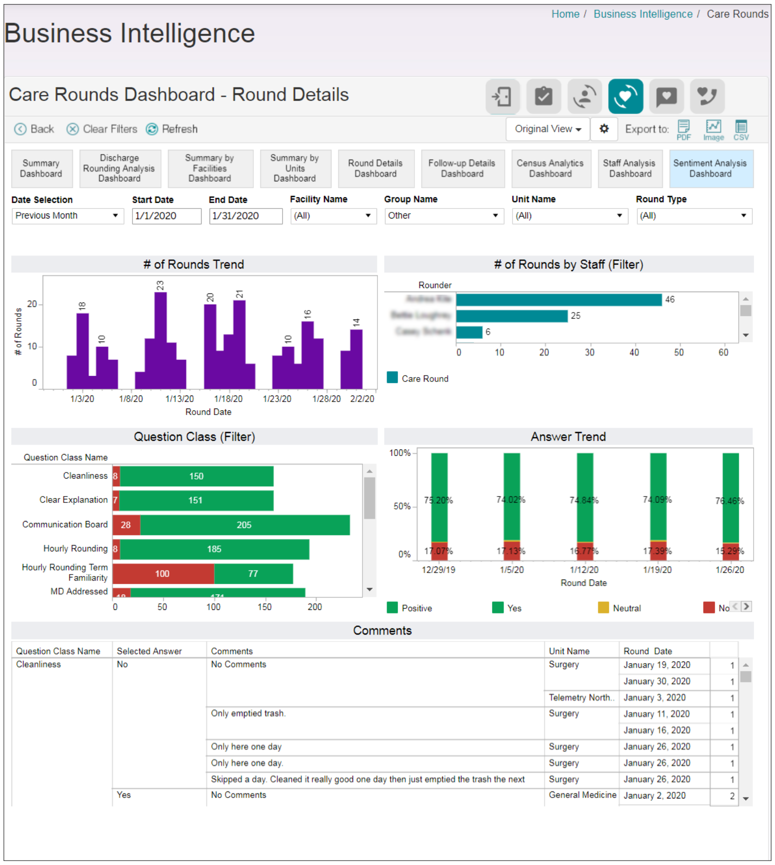
The # of Rounds Trend graph shows a frequency of rounds on a given date, and the # of Rounds by Staff graph displays the frequency of rounds by an individual staff member. The bar's color associated with the staff member details more specific rounding information, and in this example the teal color indicates a Care Round.

The Question Class graph displays a frequency of specific questions answered in rounds. The distribution of green and red within each question's bar indicates the frequency of 'yes' (green) or 'no' (red) answers for that question class.

The Answer Trend graph shows an overall trending visualization of the rounding quality from follow-up data. The green and red colors represent the percentage distribution of positive to negative experiences follow-up data provides to VCE on a given date.

When a patient has a Care Round completed during their stay, but the patient is then discharged from a different unit than the unit where they were rounded on, then Null displays for the discharging unit in the Answer Trend graph. Null in this case indicates that the patient was not rounded on in the discharging unit, but that there was a round performed. The data is accurate, and all rounds and discharges are counted in the Rounding Trend of Discharged Patients graph. The Null label could more accurately indicate “Other unit rounded”.

Comments are displayed in a table on this dashboard, with specific information on the question and selected answer as well as the comment itself. Each comment also provides the associated unit and rounding date that came with it.



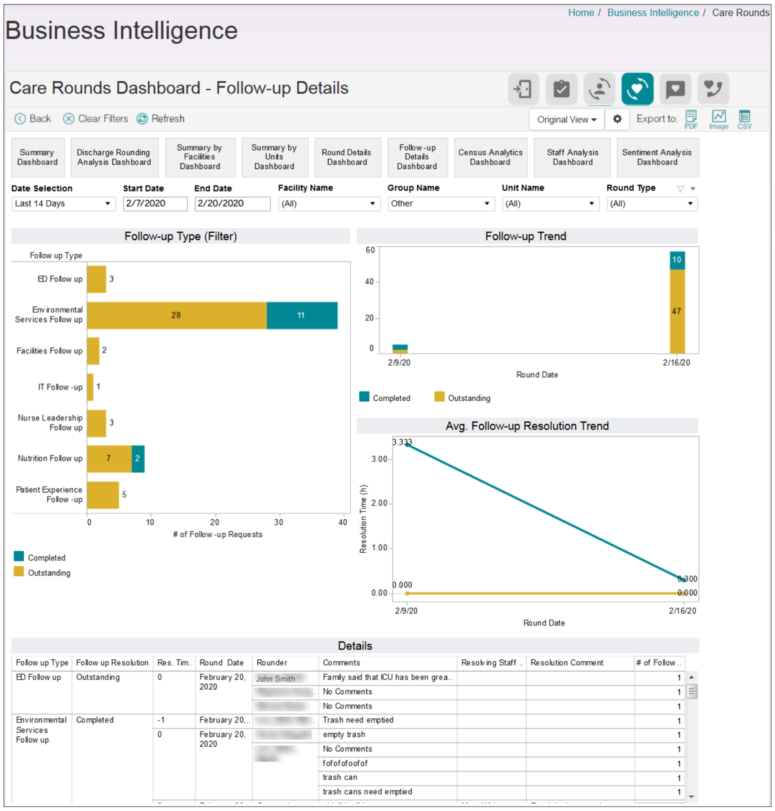
Follow-up Details Dashboard

The Follow-up Details Dashboard displays more specific trending data about follow-ups requested within the facility. The displayed data includes the follow-up types, follow-up trends, average follow-up resolution trending, and the details from submitted follow-ups.

The Follow-up Type graph shows a frequency of follow-up requests for a given follow-up type. The Follow-up Trend graph displays the frequency of follow-ups for a given date. The bar’s color associated with the follow-up details more specific information, and in this example the teal color indicates a completed follow-up, while gold indicates an outstanding follow-up. The teal and gold colors represent the percentage distribution of completed to outstanding follow-up data provided to VCE on a given date.

The Average Follow-up Resolution Trend graph shows the resolution time measured in hours, for a given day. The line color indicates the trend of completed (teal) and outstanding (gold) follow-up requests.

Details are displayed in a table on this dashboard, with specific information on the follow-up request comments and resolution comments. Full details include the follow-up type, resolution status, resolution time, name of the rounder who submitted the follow-up request, name of the resolving staff, number of follow-up requests made per follow-up type. Use the scroll bar in this table to display the full list of follow-up types reported on in this dashboard view.



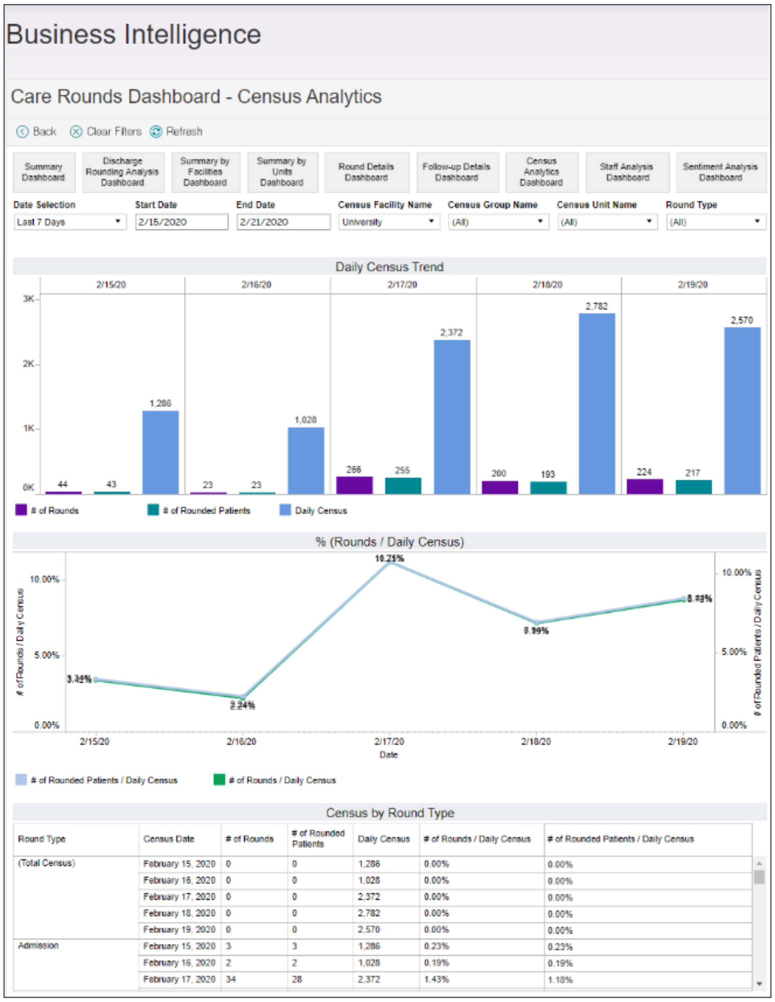
Census Analytics Dashboard

The Census Analytics Dashboard displays more specific trending data about the rounds made in relation to the census. The displayed data includes the census and number of rounds by given day trend, number of rounds by census trend, and the details for census by round type.

The Daily Census Trend graph shows an overall trending visualization of the rounding completed for the census in the given timeframe. The purple, teal, and blue colors represent the percentage distribution of rounds to census in the data provided to VCE on a given date.

The # of Rounds by Daily Census graph displays the percentage of rounded patients in the census on a given date in a blue line, and the percentage of rounds completed in the census on the given date in a teal line on this graph.

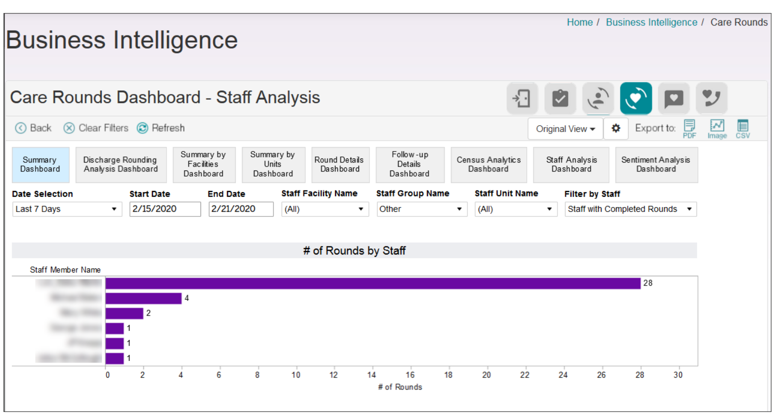
The Census by Round Type graph displays the details of the calcuated percentages for the completed rounds by round type and date.



Staff Analysis Dashboard

The Staff Analysis dashboard provides a visual representation of data for staff rounds completed within a given timeframe.

The Filter by Staff option allows you to select between all or completed rounds by staff. Mouse over the # of Rounds label below the grid to access a view icon. This icon allows you to toggle the list between lowest and highest number of rounds completed.



Sentiment Analysis Dashboard

The Sentiment Analysis dashboard provides a visual representation of data of patient sentiment within a given timeframe.

The data is color-categorized by positive (green), negative (red), neutral (yellow), and mixed (orange).

At the top, you may filter specific question classes and questions to view more focused data on specific question types. In this example, all question classes and questions are viewable to show the broadest scope of data within the timeframe.

The Sentiment Analysis Summary provides a pie graph detailing the frequency of each sentiment response.

The Sentiment Analysis Trend graph next to it provides a specific distribution of answers on a given date.

The Sentiment Analysis By Unit graph provides a detailed visualization of sentiment response at the Unit level. The graph shows the distribution of sentiment response for each Unit and the percentage shares of each sentiment response that Unit received within the selected timeframe.