NAVVIS Coreo View User Guide

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Changing Healthcare

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Preface

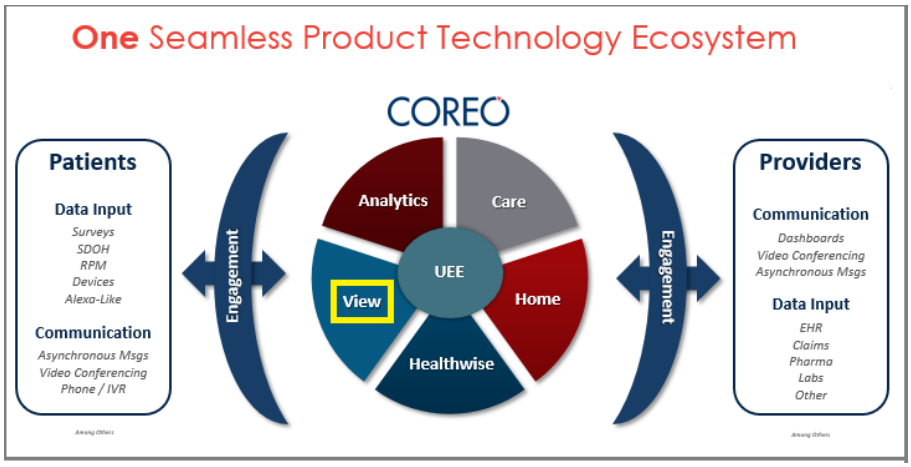
Welcome to the release of the NAVVIS Coreo View User Guide.

About Navvis Coreo View

NAVVIS Coreo View is a software platform that empowers users to manage the status and the flow of patients through Acute Care (AC), Post-Acute Care (PAC), and home networks.

Coreo View is HIPAA (Health Insurance Portability and Accountability Act) compliant and is available as a SaaS (Software-as-a-Service) cloud solution, enabling the management of patients with real-time data. Coreo View is part of the Coreo ecosystem, which allows cross-continuum care coordination and ensures seamless care transition.

The Coreo ecosystem includes the following applications as illustrated below:



About Navvis Healthcare

Navvis Healthcare provides counsel to health systems, hospitals, and physician groups on the development of innovative, market-linked strategies to build future-ready health systems, cultivate tomorrow's leaders, and strengthen strategic performance.

Purpose of this Document

This guide is the primary source of information about the Navvis Coreo View application. It contains overviews, processes, and procedures to use the Coreo View application effectively.

You can refer to the Navvis Unified Ecosystem Experience (UEE) User Guide and the Navvis Coreo Home User Guide for additional sources of information.

Intended Audience

1. **Users**: The users of the Coreo View application include the following personnel:

- Clinical staff, care coordinators, and hospital administrators
- Employees, consultants, contractors, or agents of the clinicians or patients who have been invited by the clinician or patient to access and use the service to participate in the care of the patient
- Any other person involved in the care of the patient, including patient's care providers, patient's insurer or payer, or a social worker, or government agencies

2. **Administrator-users**: The Coreo View administrator-users are assigned the task of managing other users of the Coreo View application.

Organization of the Document

This document contains the following modules:

- Coreo View User Function
    - Module 1, “User Onboarding”
    - Module 2, “Home Screen Layout and Navigation”
    - Module 3, “Bed View”
    - Module 4, “Prioritized View”
    - Module 5, “Geomap View”
    - Module 6, “Using Filters and Themes”
    - Module 7, “Global Search and Local Search”
    - Module 8, “Patient Summary”
    - Module 9, “Flagging Patient Records”
    - Module 10, “General Reports”
    - Module 11, “Synchronizing Patient View between UEE Applications with Coreo View”

- Exhibit: Coreo View and UEE Administrative Guide
    - Module 1, “Coreo View Administrator Tasks”
    - Module 2, “Settings to manage Coreo View Users”
    - Module 3, “Administrative Reports”

Conventions

This document uses the following conventions:

Convention	Item
Boldface font	**Menu** items, **Tab** names, **Text box** names, **List box** names, **Button** names and **Navigation** paths as displayed in the Coreo View application user interface (UI)
Example	*Examples to leverage the concepts*
Text in blue	Hyperlinks
	Note: Notes contain helpful suggestions. A note informs the reader about any deviation in the sequence of instructions or helps the reader save time in understanding why something is not working.
	Tip: The information helps the user solve a problem faster, or to perform an action differently.

Browsers Versions for Coreo View

The Coreo View application is available on desktops, laptops, IOS devices, and android tablets on the browser versions, as mentioned in the following table, and on higher versions.

Browser	Version
Google Chrome	74
Microsoft Edge	40
MacBook - Safari	12.1.1
Samsung Tab – Google Chrome	7.0.0
IPad IOS - Safari	12.1

Coreo View User Function

1 User Onboarding

A first-time user of Coreo View receives an automated email verification link from the Navvis administrator to activate the Okta single sign-on (SSO) account.

You can log into the Coreo View application and other applications that are part of the Coreo ecosystem through a single secure home page provided by SSO.

As a user, you can access only those applications for which you have permission for and based on the role that your Navvis administrator has assigned to you.

1.1 Log into Coreo View–First-Time user

Follow these steps to activate the Okta SSO account to access the Coreo View application:

1. Open the email link sent to your email inbox by the Navvis administrator.
2. Select the Activate Okta Account link in the email. The **Create your Navvis & Company, LLC account** screen opens.

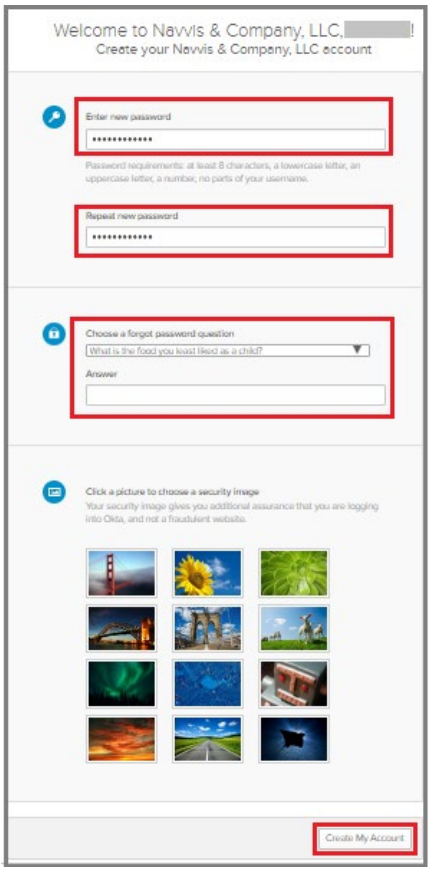


FIGURE 1. CREATE YOUR NAVVIS & COMPANY, LLC ACCOUNT SCREEN

3. Enter a new password in the **Enter new password** box.

The password must be at least eight characters long and must be a combination of these following characters:

Description	Characters
Upper case characters	A – Z
Lower case characters	a – z
Digits	0 – 9
Special characters	~ ! @ # $ % ^ & * _ - + = ` | \ () {} [] : ; " ' < > , . ? /

Table 1. System Accepted Password Characters

4. Reenter the password in the **Repeat new password** box.

In case you forget the existing password, it is recommended to add a security question to reset a new password.

5. Under **Choose a forgot password** question on the **Create your Navvis & Company, LLC account** screen, select the arrow to view the questions.

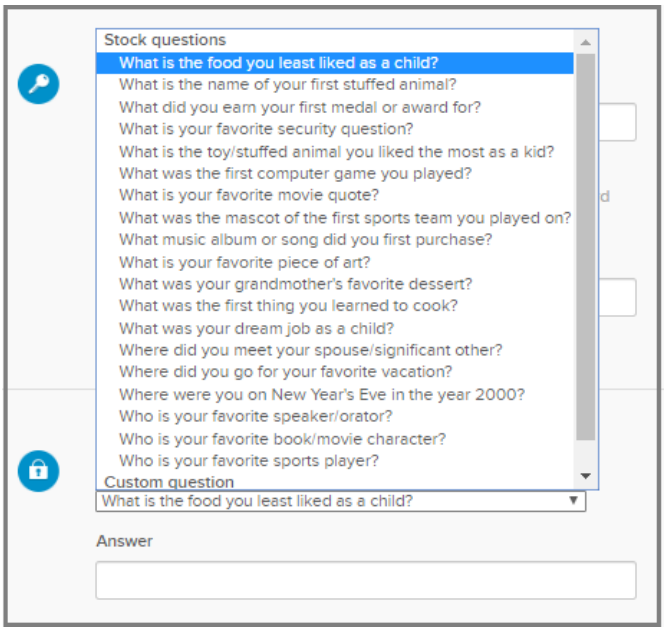


FIGURE 2. Choose A Forgot Password Question

6. Choose a security question from the list.
7. In the **Answer** box, enter the answer. You must remember this answer because it is used at a later date to reset a forgotten or expired password.

8. Choose a picture as a security image on the **Create your Navvis & Company, LLC account** screen, and then select **Create My Account**. The security image displays in the Coreo Sign In screen on entering the user name.

9. The **Coreo** landing screen opens.

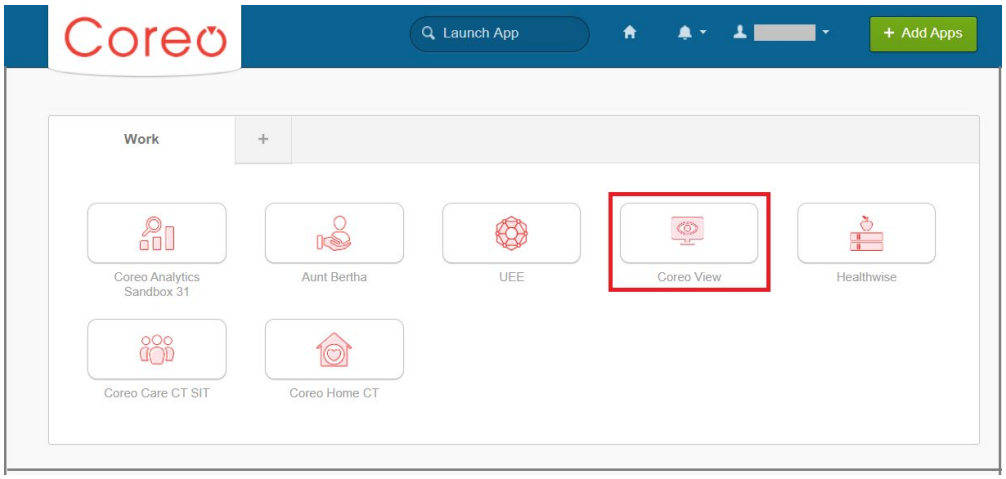


FIGURE 3. COREO LANDING SCREEN

10. Select the **Coreo View** button on the landing screen. The Coreo applications that you see on the Coreo landing screen depends upon the user-role and permissions that your Navvis administrator has assigned to you.

11. The **Coreo Sign in** screen opens.

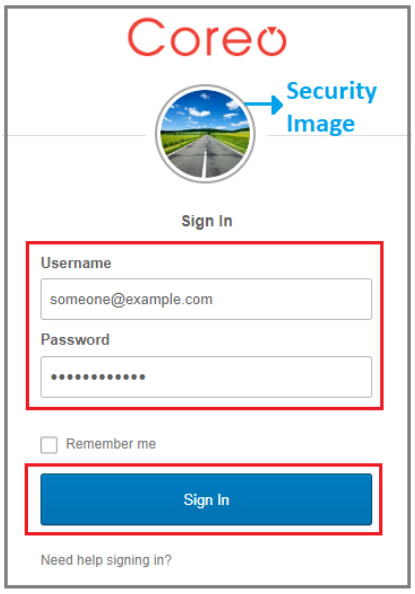


FIGURE 4. COREO SIGN IN SCREEN

12. Enter the user ID in the **Username** box.

13. Enter the password that you have set in the **Password** box.

14. Select **Sign In**.

15. The EULA screen displays for a first-time user of Coreo View. A first-time user of Coreo View is required to accept the EULA (End User License and Business Associate Agreement) before accessing the Coreo View application.

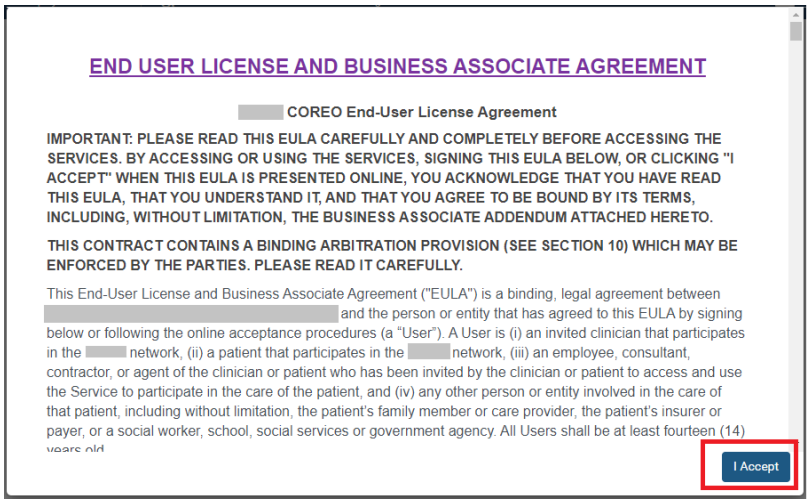


FIGURE 5. EULA PAGE

16. Read the terms and conditions and select the **I Accept** button. Your Okta SSO account is activated successfully, and the Coreo View home page opens.

> **Once the user accepts EULA and the Okta SSO account is activated, the new user becomes an existing user.**
>
> **As an existing user, go to login.coreohealth.com to open the Coreo Sign in screen.**

1.2 Manage Locked Okta SSO Account

The Okta SSO account locks for the following reasons:

- The user exceeds five failed login attempts within 24 hours. The login attempts fail when the user enters an incorrect password.

  The locked account resets after 24 hours, and the user can log in to the account after 24 hours without contacting the Navvis administrator.

  To unlock the Okta SSO account immediately after the five failed login attempts, contact the Navvis administrator.

- The Navvis administrator can lock the Okta SSO account as per the company lock account policy.

1.3 Reset a Forgotten or Expired Password

The Okta SSO password policy specifies that the password expires after 60 days, and the user must reset the password periodically.

Also, if the user forgets the password, Okta gives the option to reset the password.

Follow these steps to reset the password:

1. Go to login.coreohealth.com to open the **Coreo Sign In** screen.

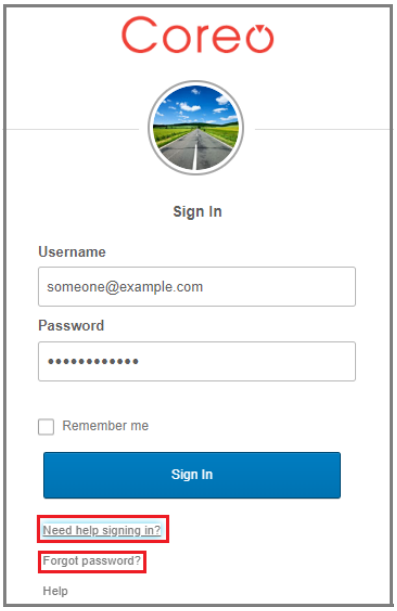


FIGURE 6. COREO SIGN IN SCREEN—NEED HELP SIGNING IN?

2. Select the **Need help signing in** drop-down list.
3. Select the **Forgot password** option to open the **Coreo Reset Password** screen.

FIGURE 7. COREO RESET PASSWORD SCREEN

4. Enter the e-mail or the user name in the **Email or Username** box.
5. Select **Reset via E-mail**. You will receive an email with a verification link from the Navvis administrator. You can reset the password using the verification link sent to your email address.

6. Reset the password with the following considerations:

- The new password cannot be among the previous six passwords.
- The password expires after 60 days, and the user must reset the password periodically.
- The user will be locked out of the application for 15 minutes after five failed login attempts. The login attempts fail when the user enters an incorrect password. Contact the Navvis administrator to reset the password.

On the successful resetting of the password, you can use the new password to log into your Okta SSO account.

2 Home Screen Layout and Navigation

Each screen in Coreo View has the same foundational structure with slight variation based upon on the user's role and permissions.

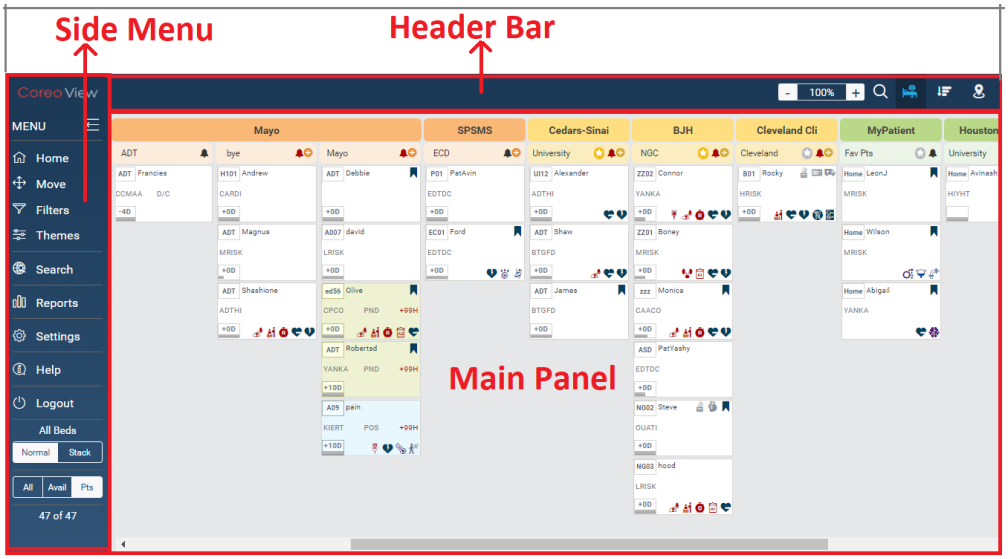


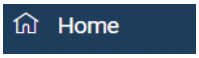
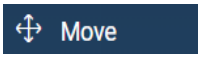
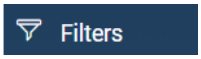
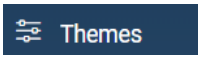
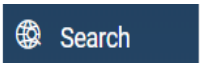
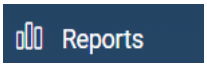
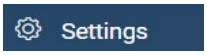
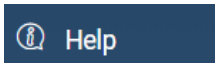
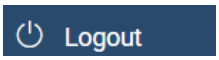
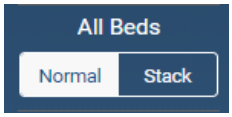
FIGURE 8. COREO VIEW HOME PAGE

The Coreo View home page layout includes the following areas:

- Side Menu: The side menu has a list of menu items and buttons to perform bed management functions for the Coreo View patients, displays the patient census for the screen layout, and helps you navigate the application.
- Header Bar: The header bar includes buttons to switch between the three main views; the **Bed View**, the **Prioritized View,** and the **Geomap View** in Coreo View.
- Main Panel: The display in the main panel is based on the three main views of Coreo View, the **Bed View**, the **Prioritized View,** and the **Geomap View**.

2.1 Side Menu

Refer to the following table to view details about the menu items and buttons included in the side menu.

Icon and Element Name	Description
 **Home**	Opens the home screen, the first screen of the Coreo View application, and can use it as a refresh button.
 **Move**	Use **Move** to process the patient move requests.
 **Filters**	Use **Filters** to display patient information based on the pre-defined filter criteria.
 **Themes**	Use **Themes** to create and save new themes based on the filter criteria.
 **Search**	Use **Search** to do a global search of patients from the Coreo Analytics application, also sometimes referred to as Coreo application.
 **Reports**	Use **Reports** to generate facility reports, audit log reports, and automation log reports.
 **Settings**	Use **Settings** to manage groups, locations, patient cohorts, user access, and permissions.
 **Help**	Use **Help** to open the Coreo View user help document.
 **Logout**	Use this to log out of the Coreo View application.
 **All Beds** group	This button group has two buttons, **Normal** and **Stack.**

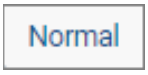
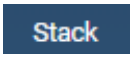
 **Normal** view button	The Normal view is the default view. It displays the empty bed cells, and the occupied bed cells in each column placed adjacent to each other. The beds per column are categorized based on the groups and their locations.
 **Stack** view button	Displays the empty bed cells, and the occupied bed cells in each column placed one below the other. The beds per column are categorized based on the groups and their locations.
 Three-state toggle button	This button group has three buttons, **All, Avail,** and **Pts.**
 **All** button	Select **All** to view the empty bed cells, the bed cells occupied with patients, and the empty locations.
 **Avail** button	Select **Avail** to view the empty bed cells that are available to assign to the patients and the occupied beds.
 **Pts** button	Select **Pts** to view all the bed cells that are occupied with patients. The Pts view is the default view in the three-state toggle button.
 Patient Count	The total number of patients in the bed view across all the groups, Acute Care (AC), Post-Acute Care (PAC), and Cross Continuum (CC), displayed on a single screen of the bed view. When you navigate to the next screen using the chevron icon, the patient count increases and adds to the previous patient count. *For example, 20 of 47; 20 indicates the number of patients displayed in the bed view per screen; 47 indicates the total count of all the patients in the entire bed view;* *When you reach the last screen of the bed view, the per-screen count and the final count match, 47 of 47.*

Table 2. SIDE MENU ELEMENTS

2.2 Header Bar

Refer to the following table for details about the header bar elements:

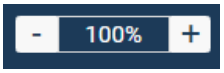
Icon and Element Name	Description
 Coreo View logo	The Coreo View logo
 Magnification icon	Zoom in (+) to increase or zoom out (-) to decrease the bed view layout magnification. 60% being the least and 240% being the maximum magnification values.
 Coreo View Search icon	Select this button to search the patient records in bed view based on criteria such as patient name, MPI (Master Patient Index), group, location, cohort details.
 Bed View (BV) button	Select this button to display patient and bed information organized by groups and locations with bed cells arranged vertically below.
 Prioritized View (PV) button	Select this button to display a simplified view of the patient list that is sorted by pre-defined criteria and applied to a user-specified time range.
 Geomap View (GMV) button	Select this button to display graphical markers representing the number of patients associated with the location on a geographical map. The view can be filtered based on the three groups, AC, PAC, and CC, and may include pharmacies and food pantries.

Table 3. HEADER BAR ELEMENTS

2.3 Main Panel

View the patient records in the main panel assigned to different groups (AC, PAC, and CC) and locations by selecting from the following three views:

- **Bed View**
- **Prioritized View**
- **Geomap View**

Coreo View displays real-time patient information in the Bed View, Prioritized View, and Geomap View.

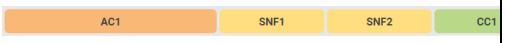
3 Bed View

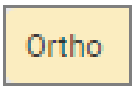
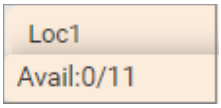
The bed view layout displays the patient information based on the type of group, location, patient cohorts, patient attributes, bed attributes, bed activities, and patient move requests. The bed view is the default home page.

FIGURE 9. THE BED LAYOUT VIEW

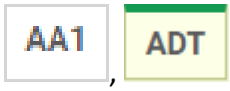
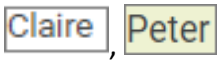
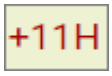
3.1 Bed View Layout Elements

Refer to the following table for details about the bed view layout elements:

Icon Name and Element Name	Description
 Group Header Bar	The header bar displaying the group color code and the group name
 AC Group Bar	The color code for Acute Care (AC) group
PAC group bar	The color code for Post-Acute Care group
 CC group	Color code for Cross Continuum group

 Location header bar	The header bar displaying the location attached to the group
 Location name-AC Group  Location name-PAC Group  Location name-CC Group	The location belonging to the group
 **Avail** beds	View the available empty beds and the total number of beds for that location. Hover the cursor over the Location header bar to view **Avail**.
 Level Icon-**Platinum**  Level Icon-**Gold**  Level Icon-**Participating**	View the NAVVIS's partnership agreement levels with the facilities. **Platinum**, **Gold,** and **Participating** are the three-tier levels. The level for a facility is set up when creating a location and is available for the Post-Acute Care and Cross Continuum group-types only.
 Bell Icon–Red	A red bell icon Indicates overdue patient activities, patient move requests, pending patient discharges, and bed cleaning tasks; It is also an indication that the patient needs to be attended to without any further delay.

 Bell Icon–Black	A black bell icon indicates that the patient's discharge process is complete.
 Add Bed button–Acute Care group  Add Bed button–Post-Acute Care group  Add Bed button–Cross Continuum group	Use the Plus icon to add a new bed. A new bed is either a standard bed or an overflow bed type (ADT bed) indicating that a patient is waiting for a bed, for example, as in a hallway.
 Bed Cell  ADT Bed Cell	A bed cell displays the pictorial summary of a bed, the assigned patient name, and the patient-specific health information. The summary is displayed as component icons. An empty bed cell that is available for a patient is yellow, and an occupied bed cell is white. The bed highlighting color depends on patient disposition status.

 Bed ID	The bed identification number. An ADT bed has a default bed id "**ADT**." Coreo View creates a temporary bed called an ADT bed under a location automatically when you move the patient from a bed cell to an occupied (destination) bed cell. The patient in the destination bed cell is moved to the ADT bed indicating that the patient, for example, is in a hallway and is waiting for an actual bed. Also, an ADT bed under a location is created when you admit the patient in an **Emergency** state. However, an ADT bed under the ADT location receives only discharged patients. Coreo View creates an ADT location automatically for each new group that you create. The green bar indicates that a recent action has been performed in the bed cell.
 Patient name	The last name of the patient
 Bed attributes	The bed attributes include **Male Room**, **Female Room**, **Bariatric**, **Mobile Home**, **Private Room,** among others. Refer to the Bed Attributes figure to view the complete list of bed attributes.
 Alert time	Alert time in hours displays in red color if the patient disposition is not processed within the set time frame.

 Patient attributes icons and Patient activities icons	The patient attributes icons represent health-related descriptors such as **Chest Pain**, **Fall Risk**, **Diabetes**, among others. The patient activities icons represent health-related interventions and treatments such as **Insulin Drip**, **Med reminders**, among others. Refer to the Patient Attributes table and Patient Activities table to view the complete list of patient attributes and activities. The **Patient Activities** appear blue. The icon turns to red when an assigned care team member does not perform the activity within the established time frame.
 LOS indicator	The patient's **Length of Stay** in the facility counted in the number of days.
 Patient cohort	The cohort group to which the patient is assigned within the Coreo application. The patients are categorized into cohorts based upon various factors, including medical conditions, social determinants, risk scores, among others.
 Patient disposition status	View the patient disposition status.
 Flag Icon–Blue	You flag a patient record when the patient of Coreo Analytics is not assigned to any bed in Coreo View and yet needs to be monitored. Coreo Analytics stores the master list of all the patients. A blue flag icon represents that the patient is in the flagged status.

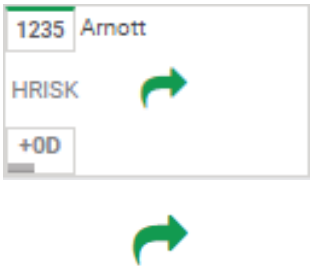
 Move Request–Green arrow	The dark green arrow indicates that the patient's move request from one bed to another bed is accepted.
 Move Request arrow–Light green	The olive-green color arrow indicates that the user has initiated the patient's move request from one bed to another bed and that the approval is pending
 Move Request–Red arrow	The red arrow indicates that the user has rejected the move request for that bed.
 Chevron icon	Use the chevron icon to navigate from one Bed View-screen to another.

Table 4. BED VIEW LAYOUT ELEMENTS

Refer to the following table for information on the patient disposition status and the bed highlighting colors:

Patient Disposition Status	Bed Cell Highlighting Color	Acronym Displayed in the Bed Cell
Emergency	White	**ED**
Observation	White	**OBS**
Admitted	White	No Acronym displayed
Discharge Possible	Aqua blue	**POS**
Discharge Pending	Green	**PND**
Complete	White	**D/C**

Table 5. BED CELL HIGHLIGHTING AND PATIENT DISPOSITION STATUS

3.2 Viewing Modes—Normal View and Stacked View

There are two available Viewing Modes of the Bed View Layout:

- Normal View
- Stacked View

The Normal view is the default view. It displays the empty bed cells, and the occupied bed cells in each column adjacent to each other based on the three-state toggle button (**All Avail Pts**) that you select.

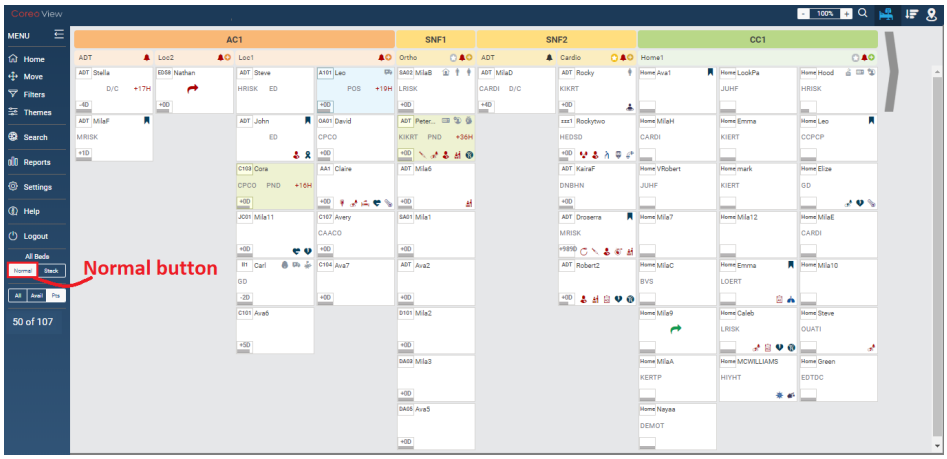


FIGURE 10. BED VIEW–NORMAL VIEW MODE

The stacked view displays the empty bed cells, and the occupied bed cells in each column placed one below the other. The beds per column are categorized based on the three groups and their locations.

FIGURE 11. BED VIEW–STACKED VIEW MODE

Both views display the beds within their respective group (Acute Care, PAC, or Cross Continuum) and the specific location within the group. The difference between Normal View and Stacked View is in the placement of the bed cells.

3.3 Viewing Modes—All, Available, and Patient

Coreo View provides three viewing modes, **All**, **Avail,** and **Pts,** to view the patient count based on occupied beds, empty beds, and empty locations.

All view mode: The **All** view mode displays the empty bed cells, the bed cells occupied with patients, and the empty locations if any.

Avail view mode: The Available view mode displays the empty bed cells and the occupied beds.

Pts view mode: The Patient view mode displays only those bed cells that are occupied with patients. **Pts** is the default bed view mode.

3.3.1 All View Mode

Follow this step to view the bed cell-slots, including empty bed cells, empty locations, and occupied bed cells:

1. On the **Side Menu**, select the **All** button, the first button of the three-state toggle button.

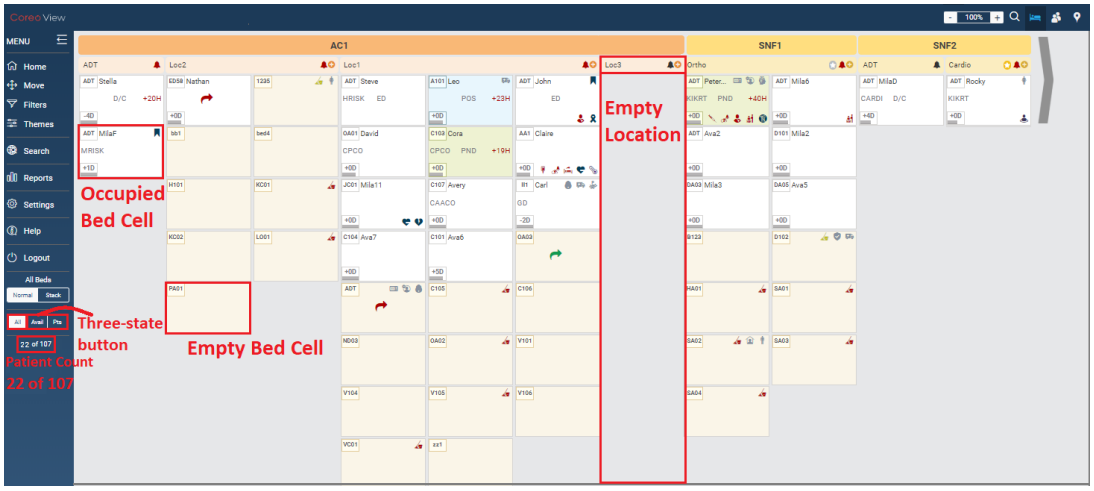


FIGURE 12. BED VIEW LAYOUT IN THE ALL VIEW MODE

The **All** view mode displays the empty bed cells, the bed cells occupied with patients, and the empty locations if any.

The patient-count on the Bed View screen displays on the **Side Menu**.

For example, 22 of 107. 22 indicates the number of patients on the current screen, and 107 indicates the total number of patients in the entire bed view layout, which you can view as you navigate to the last screen of the bed view layout.

Each bed screen displays 50 bed-cell slots, and this number can be changed from the application backend by the administrator, and the patient count changes in each mode to adjust itself to the number (50) of the bed-cell slots.

3.3.2 Avail View Mode

Follow this step to view the beds which are available to assign to the patients in the Available view mode:

1. On the **Side Menu**, select the **Avail** button, the middle button in the three-state toggle button.

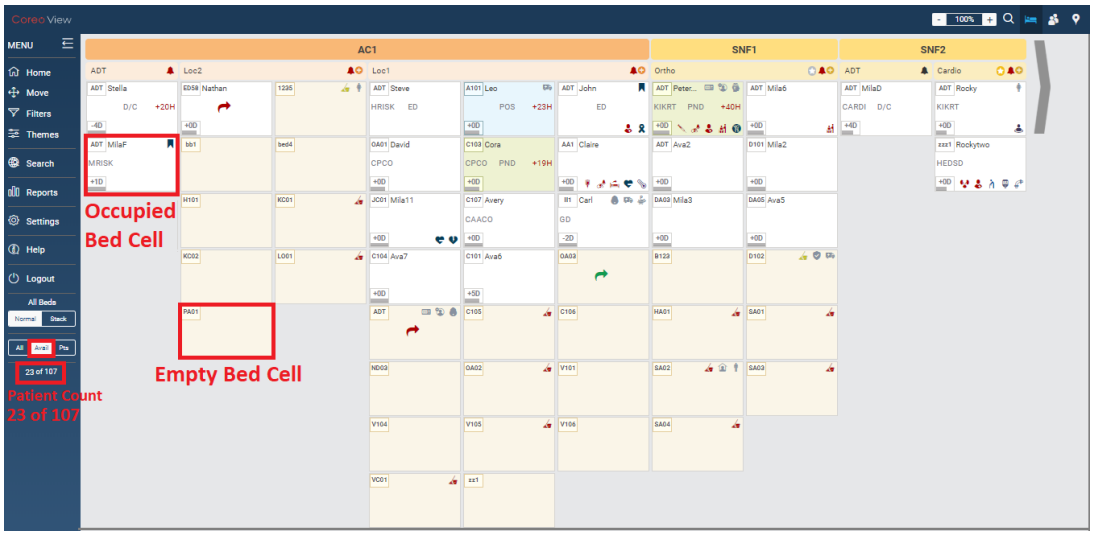


FIGURE 13. BED VIEW LAYOUT IN THE AVAIL VIEW MODE

The Available view mode displays the empty bed cells and the bed cells occupied with patients.

3.3.3 Pts View Mode

Follow this step to view those bed cells which are assigned to the patients in the **Pts** view mode:

1. On the **Side Menu**, select the **Pts** button, the third button in the three-state toggle button.

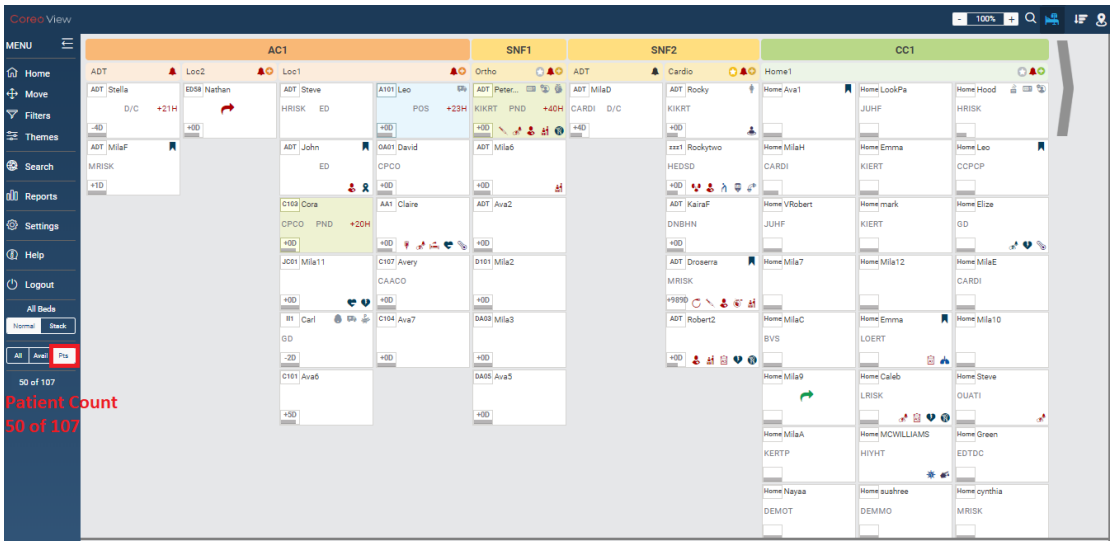


FIGURE 14. BED VIEW LAYOUT IN THE PTS VIEW MODE

The Patient View mode displays only those bed cells that are occupied with patients.

You can use the three viewing modes in combination with the **Normal** view mode and the **Stack** view mode.

3.4 Add a Bed to a Location

Coreo View gives you the provision to add multiple beds to a location one bed at a time by using the **Add Bed to Location** window (Go to **Bed View** layout > **Location** header bar > **Add Bed** button). You can add new beds to a location belonging to any of the three groups, belonging to group-types, AC, PAC, or CC.

Adding a bed using the **Add Bed to Location** window includes the following:

- Creating a new bed: You create a new empty bed without assigning a patient to the bed
- Assigning a patient to a bed: You create a new bed and simultaneously assign a patient to the newly created bed.

3.4.1 Create a New Bed

Follow these steps to create a new bed and add it to a location in the **Add Bed to Location** window:

1. Click the **Coreo View** application on the Coreo Landing screen to open the **Coreo View** home screen. The Bed View is the default layout on the Coreo View home screen unless the user changes it to Prioritized View or Geomap View.

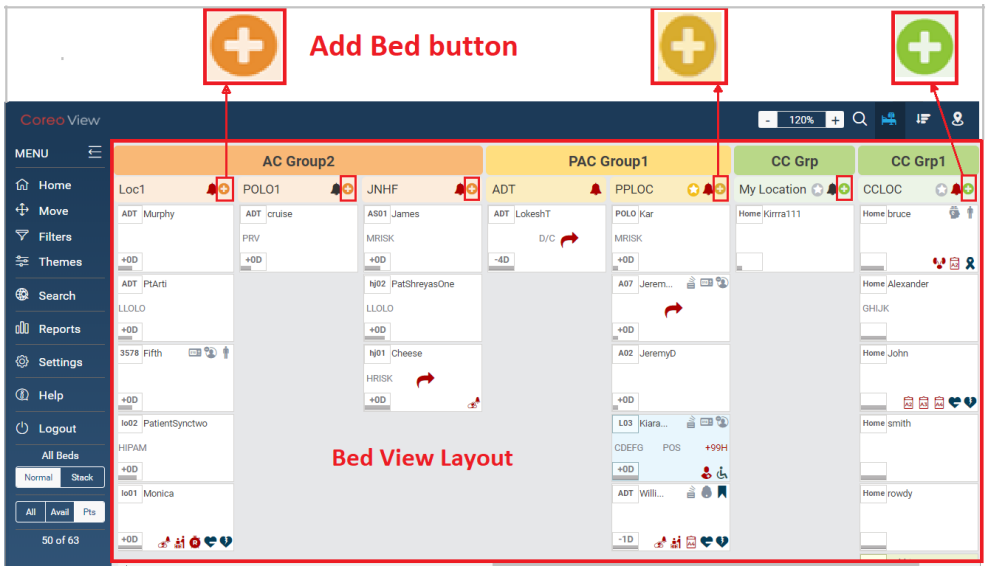


FIGURE 15. BED VIEW LAYOUT–ADD BED BUTTON

2. Click the **Add Bed** button on the Location header bar to open the **Add Bed to Location** window.

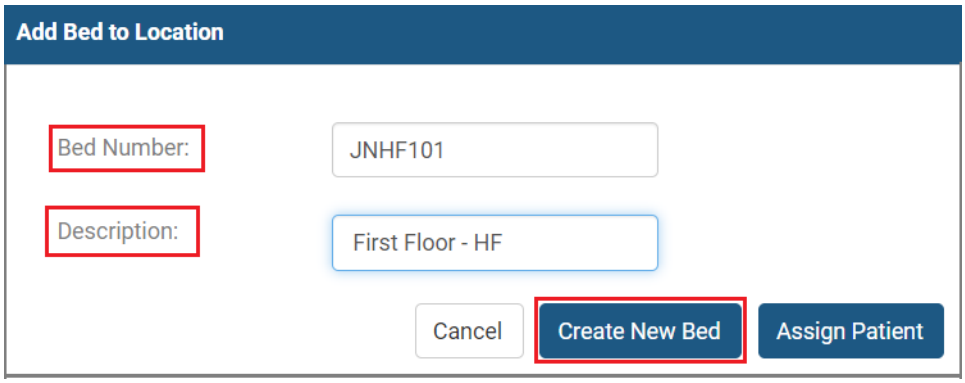


FIGURE 16. ADD BED TO LOCATION WINDOW–CREATE NEW BED

3. Enter the bed number in the **Bed number** box; it accepts digits (0–9), alphabetic characters (A–Z, a–z), or a combination of alphabet and digits.
4. Enter a description for the bed in the **Description** field.
5. Select the **Create New Bed** button to create a new bed.

6. The newly created bed displays as a bed cell in the Bed View Layout. Select the **All** button or the **Avail** button on the **Side Menu** under the **All Beds** button group to view the new bed cell.

The last four characters of the bed-number are displayed in the upper-left corner of the bed cell. Hover the mouse pointer over the last four characters to view the full bed number.

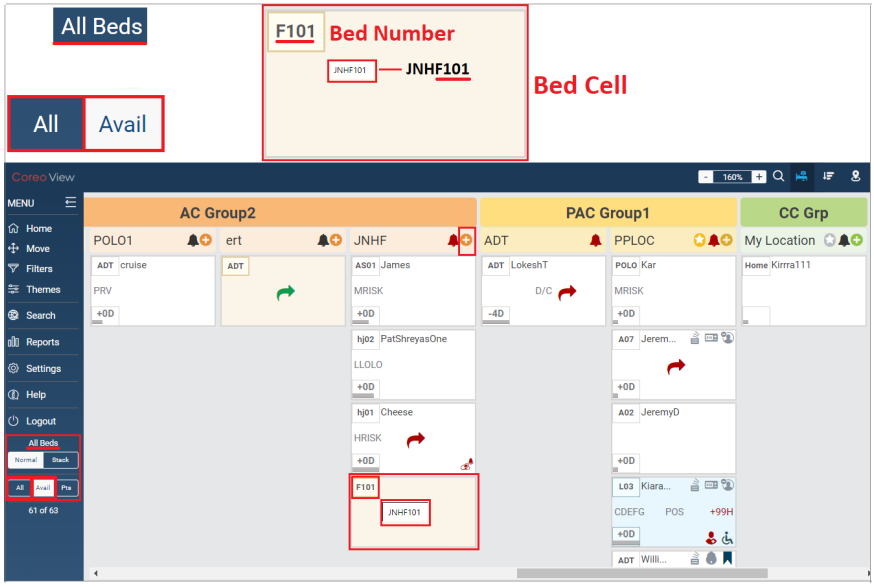


FIGURE 17. BED VIEW LAYOUT–THE NEWLY CREATED BED

The newly created bed is empty, and you can assign bed attributes to the empty bed in the **Summary** window, and you can also assign a patient to the bed from the empty bed cell.

7. Select the empty bed cell to which you want to assign the patient. The **Summary** window opens.

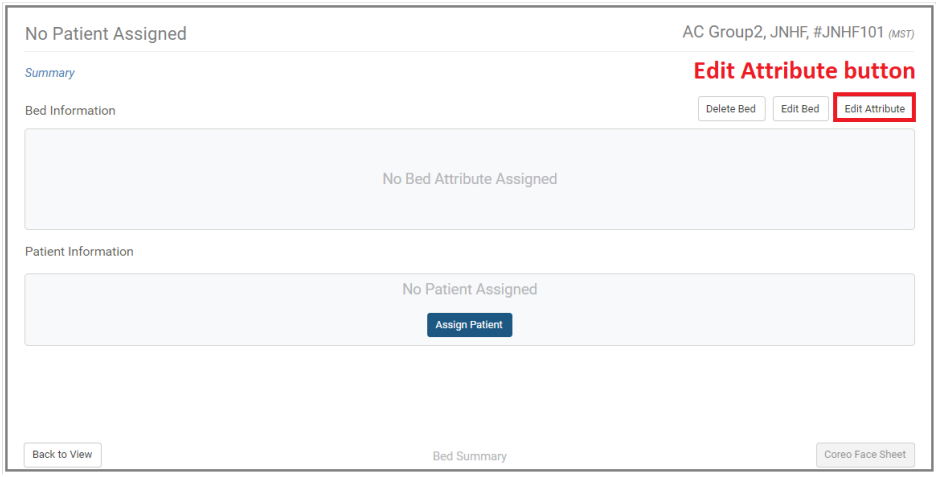


FIGURE 18. SUMMARY WINDOW–EDIT ATTRIBUTE BUTTON

8. Select the **Edit Attribute** button to assign the attributes to the bed. The assigned bed attributes display in the **Bed Information** box.

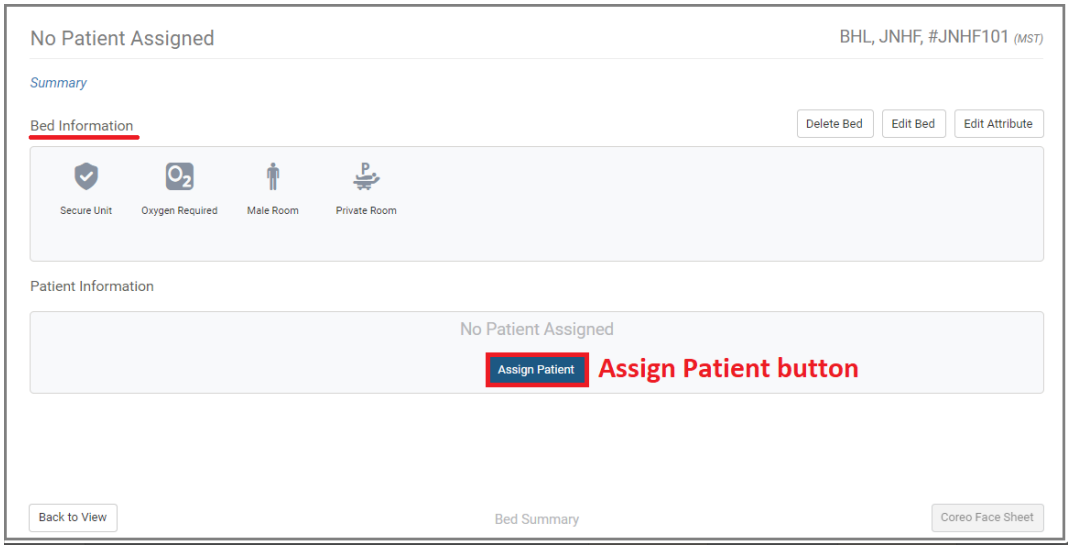


FIGURE 19. SUMMARY WINDOW–ASSIGN PATIENT BUTTON

9. Select the **Assign Patient** button to assign a patient to the empty bed cell. The **Summary** window–**Assign Patient** page opens. The procedural steps to assign a patient from an empty bed cell and the steps to assign a patient using the **Assign Patient** button in the **Add Bed to Location** window are the same.

3.4.2 Assign a Patient to a Bed

Follow these steps to create a new bed and simultaneously assign a patient to the newly created bed in the **Add Bed to Location** window:

1. In the Bed View layout, click the **Add Bed** button on the **Location** header bar to open the **Add Bed to Location** window.
2. Enter the bed number in the **Bed number** box.
3. Enter a description for the bed in the **Description** field.

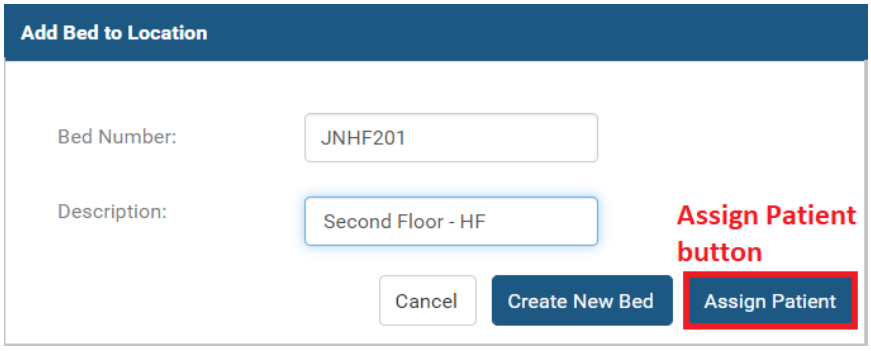


FIGURE 20. ADD BED TO LOCATION WINDOW–ASSIGN PATIENT

4. Select the **Assign Patient** button to open the **Summary** window–**Assign Patient** page.

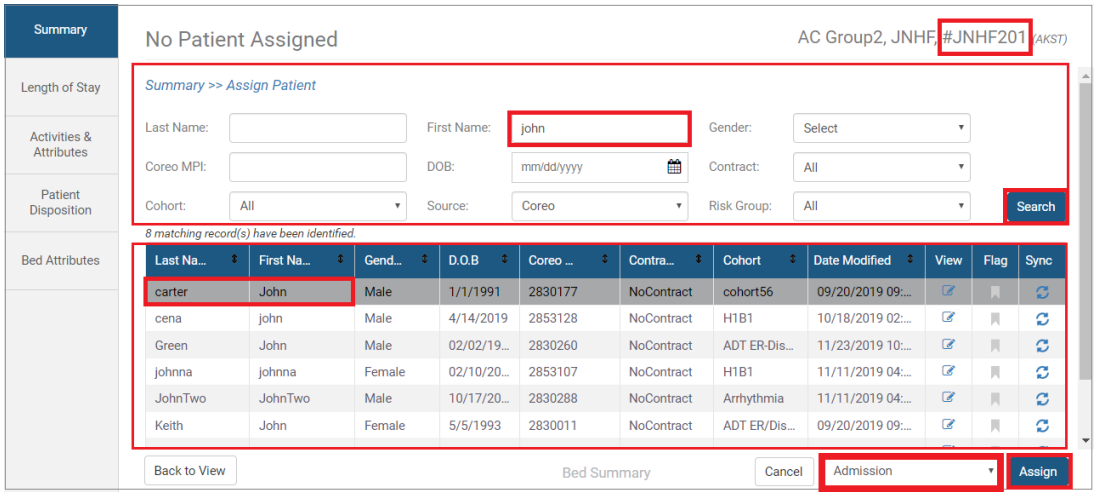


FIGURE 21. SUMMARY WINDOW–ASSIGN PATIENT PAGE

5. Enter one or more criteria to search for a patient in the upper pane of the window. You can search the patient based on the following criteria:

   - **Last Name:** The last name of the patient
   - **First Name:** The first name of the patient
   - **Gender:** Select the gender of the patient from these options:
     - **Male**
     - **Female**
     - **Unknown**
     - **Undifferentiated**
   - **Coreo MPI:** The Master Patient Index (MPI) is a unique identification number generated for each patient in Coreo.
   - **DOB:** Patient's date of birth
   - **Contract:** The contract that the patient has
   - **Cohort:** The Cohort group that is assigned to the patient in Coreo
   - **Source:** The Coreo Analytics platform interfaces with Coreo View to provide the master source of patient information.
     - **Risk Group:** Select the risk group that the patient is assigned to from these options; **All, High Risk – HRISK, Moderate Risk – MRISK, Low Risk – LRISK**.

6. Click the **Search** button to search the patient. The patient details are fetched from the Coreo application.

Coreo View displays the patient details in the lower pane of the window, based on the search criteria that you enter in the upper pane of the **Summary** window–**Assign Patient** page.

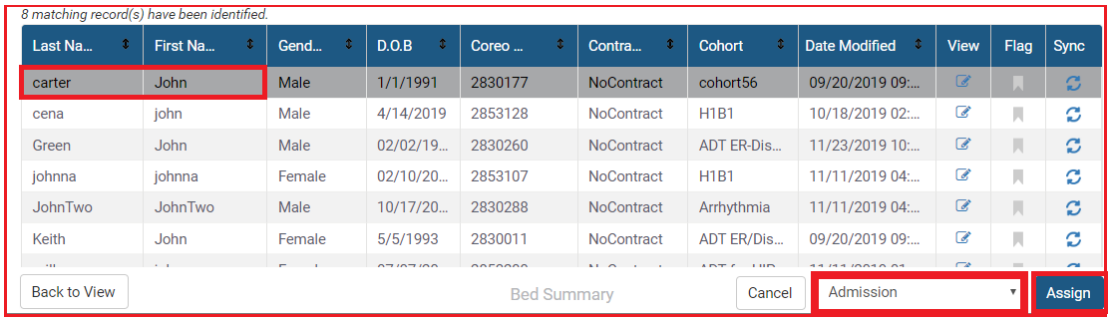


FIGURE 22. SUMMARY WINDOW–ASSIGN PATIENT PAGE–LOWER PANE

7. Select the patient to assign to the newly created bed.
8. Select the **Admission** arrow to display the patient disposition status and choose the state in which the patient is admitted from the following states:

- **Admission**
- **Observation**
- **Emergency**

When you select the **Emergency** state, Coreo View admits the patient to the **ADT** bed. You can assign an **Emergency** state to a patient in a group of the **AC** group-type only.

A patient admitted to the Emergency department is indicated in Coreo View by selecting the **Emergency** state in the **Admission** arrow in the **Summary** window.

Coreo View has a location pre-defined in the Cross Continuum group to automatically receive those patients in the **Emergency (ED)** state after a configurable time.

When the automated data-synchronization job runs in the Coreo View database, the patient in the **ED** state is moved to the pre-defined CC location automatically based on the periodicity of the synchronization job, or on time configured for this event (The event of moving the **ED** patient to the pre-defined CC location).

9. Select the **Assign** button to assign the patient to the newly created bed. On successfully assigning the patient to the newly created bed, the **Summary** window displays the details of the patient assignment activity.

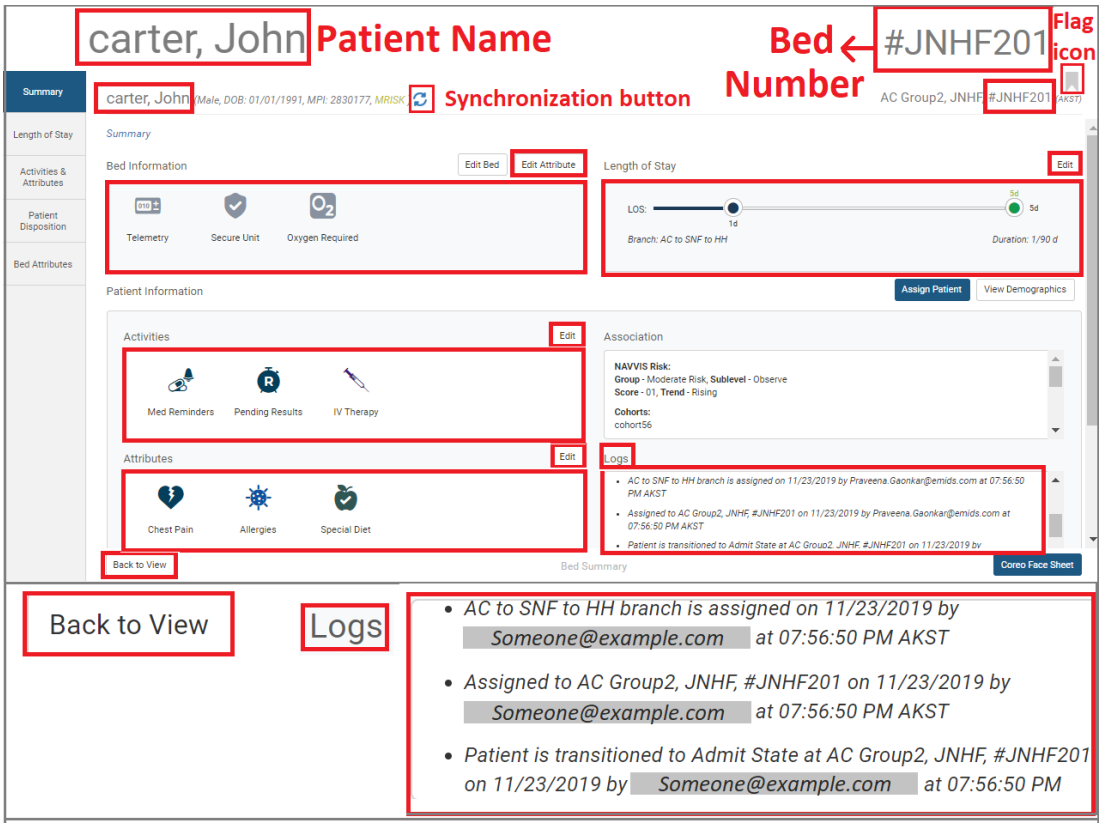


FIGURE 23. SUMMARY WINDOW– A PATIENT ASSIGNED TO THE NEW BED

10. Click the **Edit Attributes** button to assign the bed attributes.
11. Click the **Edit** button above the **Length of Stay** box to modify the patient's length of stay in the facility.
12. Click the **Edit** button above the **Activities** box to assign the activities for the patient.
13. Click the **Edit** button above the **Attributes** box to assign the attributes to the patient.

You can view and track the activities, bed assignments, movements, updates, and attributes assigned to the patient in the **Logs** box. It displays the user role who has made changes to the patient records.

Refer to the **Patient Summary** topic in this user guide for more information on the **Summary** window.

14. Click the **Synchronization** button to view the same patient record in another Coreo application. Synchronization allows you to harmonize the patient record in Coreo View with the same patient record of another Coreo application when viewing the applications in two or three different panels on your monitor screen.

15. Click the **Back to View** button to go back to the Bed View layout.

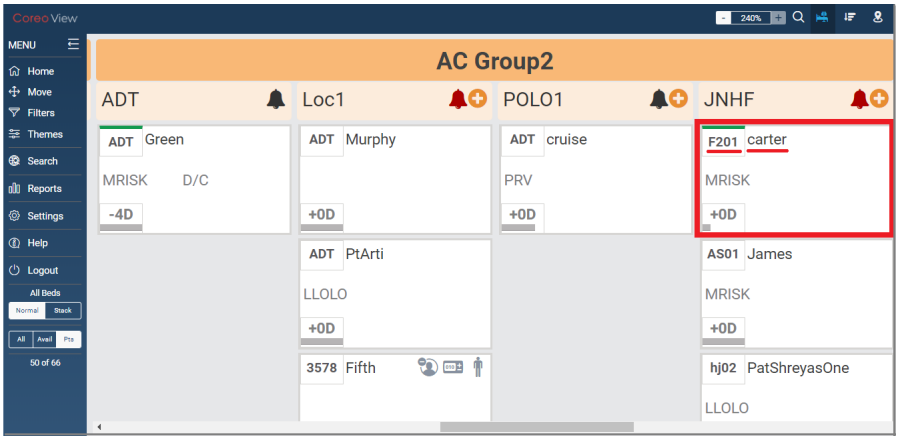


FIGURE 24. BED VIEW LAYOUT–A PATIENT ASSIGNED TO A NEWLY CREATED BED

16. View the patient that you assigned to the newly created bed.

3.5 Manage Inter-Facility Patient Transfers

Patient transfer involving the movement of patients to and from beds of different medical facilities is a routine procedure in hospitals.

Coreo View provides the functionality to capture and track patient movements.

3.5.1 Quick Move

Follow these steps to quick-move a patient from one bed to another bed:

1. Open the Bed View layout and on the **Side Menu** select **Move.**
2. Select the patient in the bed cell that you want to move from (Origin bed) to another bed (Destination bed).

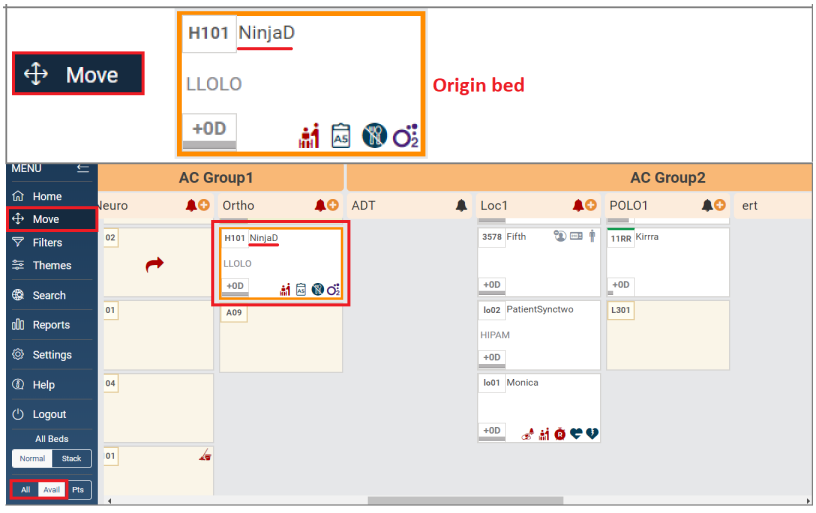


FIGURE 25. BED VIEW LAYOUT–ORIGIN BED

3. Select the destination bed cell (empty bed cell) that you want the patient to move to. On selecting the destination bed, the bed cell borders change to green color, and the **Move Patient** window opens.

> **On the Side Menu, click the Avail button or the All button to view the empty bed cells.**

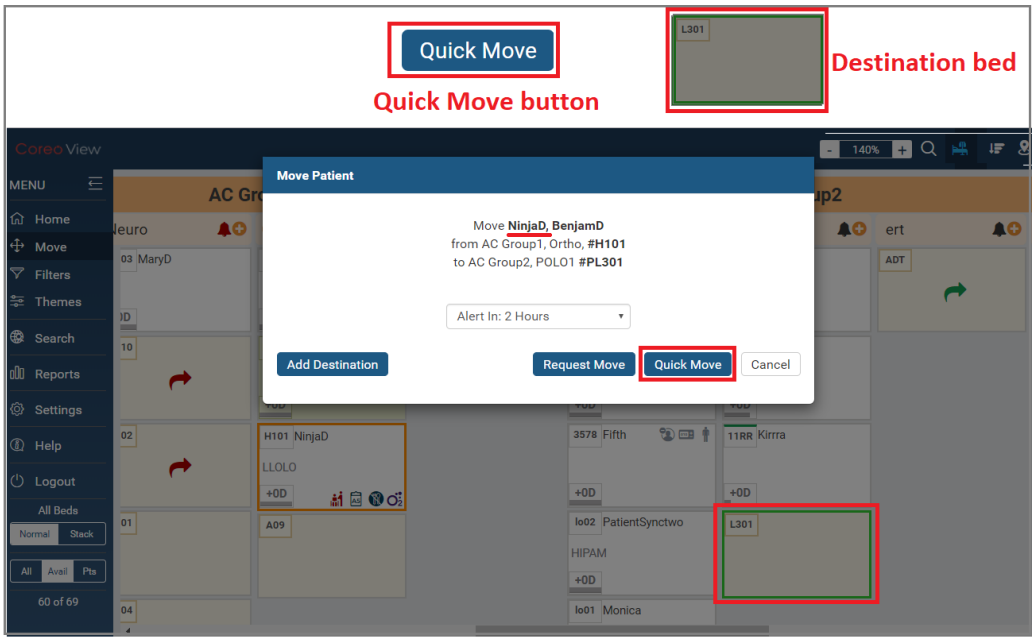


FIGURE 26. MOVE PATIENT WINDOW

4. Select the **Quick Move** button in the **Move Patient** window to move the patient to the destination bed in the bed view layout.

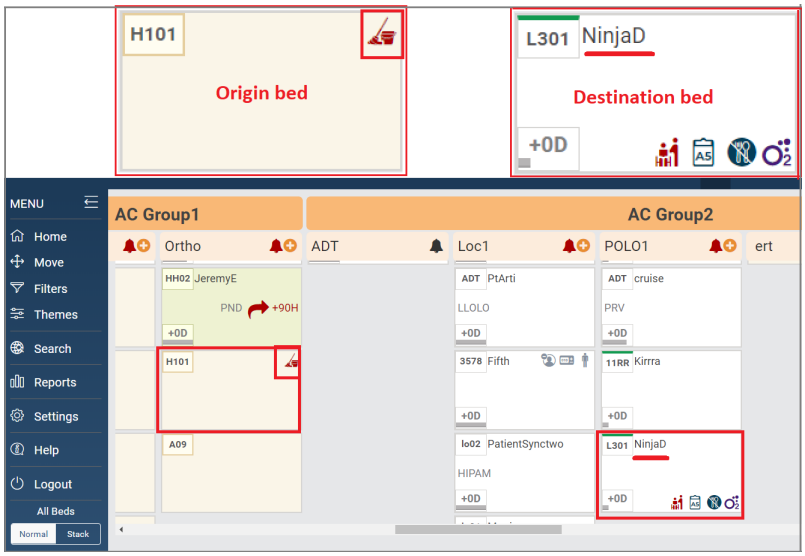


FIGURE 27. BED VIEW LAYOUT–PATIENT MOVED TO THE DESTINATION BED

The patient is moved to the destination bed. The origin bed cell is empty, and a bed cleaning icon displays in the upper-right corner of the bed cell in the origin bed.

When selecting the destination bed cell, if you click the location bar, instead of an empty bed cell, Coreo View creates an ADT bed, and the patient is moved to the ADT bed under the location that you have selected, on selecting the Quick Move button.

3.5.2 Request Move—Moving Patients within the Same Group

When you move a patient on request from one bed to another bed within the same location of that group (and within the same group-type, AC, PAC or, CC), or across different locations within the same group, you need not discharge the patient from the origin bed.

Follow these steps to move a patient from one bed to another bed within the same group:

1. In the Bed View layout and on the side menu, select **Move**. **Move** remains highlighted on the side menu during the process of selecting the origin bed and the destination bed.
2. Select the patient in the bed cell that you want to move from (origin bed). The bed cell borders change to orange color.
3. Select the destination bed (empty bed cell) belonging to the same group, within the same location, or across different locations, to which you want to move the patient. The bed cell borders of the destination bed change to green color, and the **Move Patient** window opens.

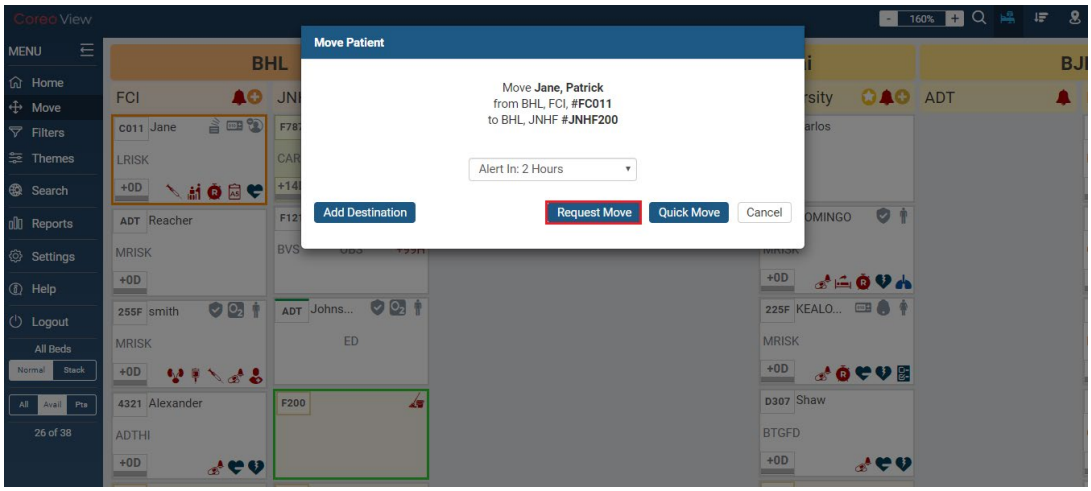


FIGURE 28. MOVE PATIENT WINDOW–REQUEST MOVE BUTTON

4. Select the **Request Move** button to add the destination bed.

The **Move Patient** window closes, and on the bed view layout, an olive-green color move-indicator arrow displays in the origin bed cell and the destination bed cell, indicating that the patient move request is initiated at the origin bed and the destination bed.

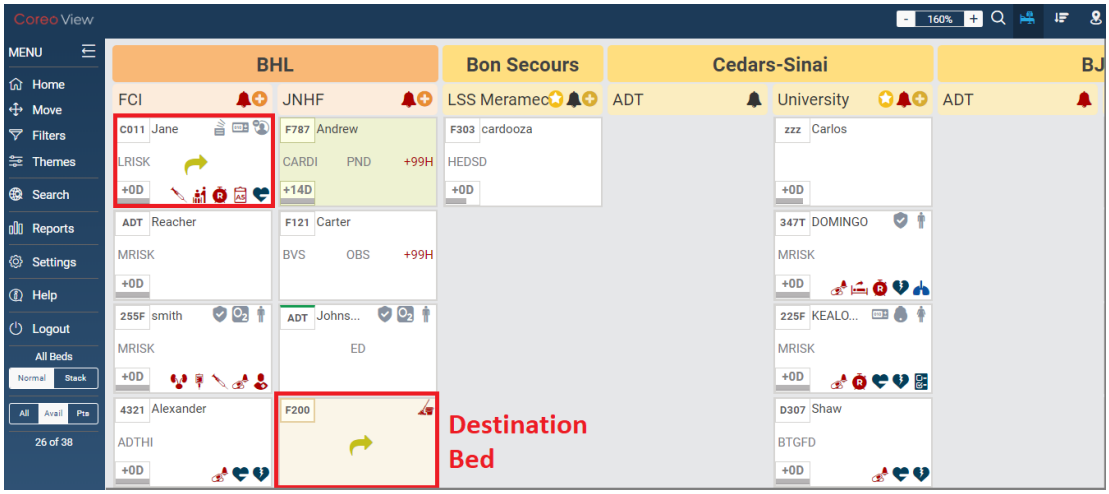


FIGURE 29. BED VIEW LAYOUT–PATIENT MOVE REQUEST INITIATED

5. Select the destination bed cell to open the **Summary** window.

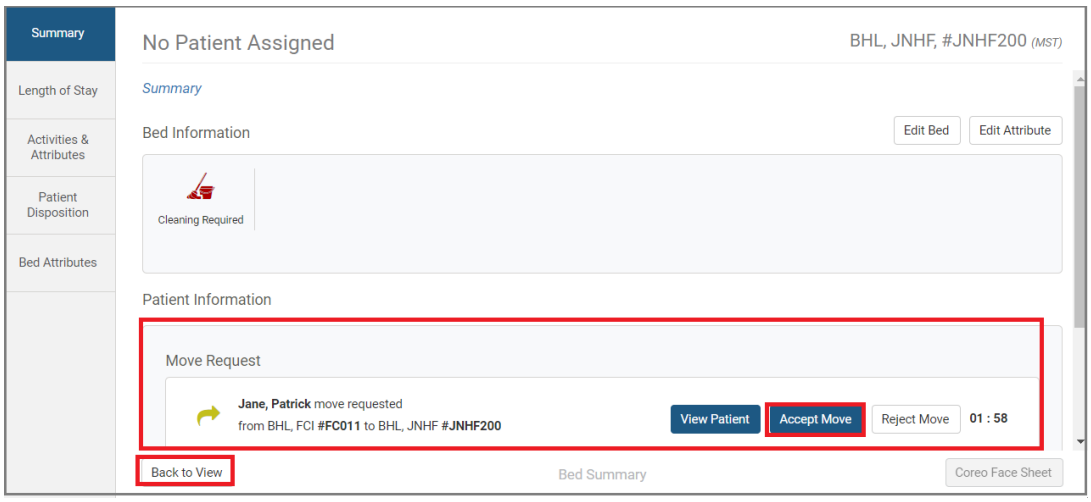


FIGURE 30. SUMMARY WINDOW

In the **Move Request** box, you can view the patient move request details.

6. Select the **Accept Move** button to accept the move request changes. You can also reject the move request by selecting the **Reject Move** button. If rejected, a red arrow displays in the bed cell in the Bed View.

7. Select **Back to View** to go to the bed view layout.

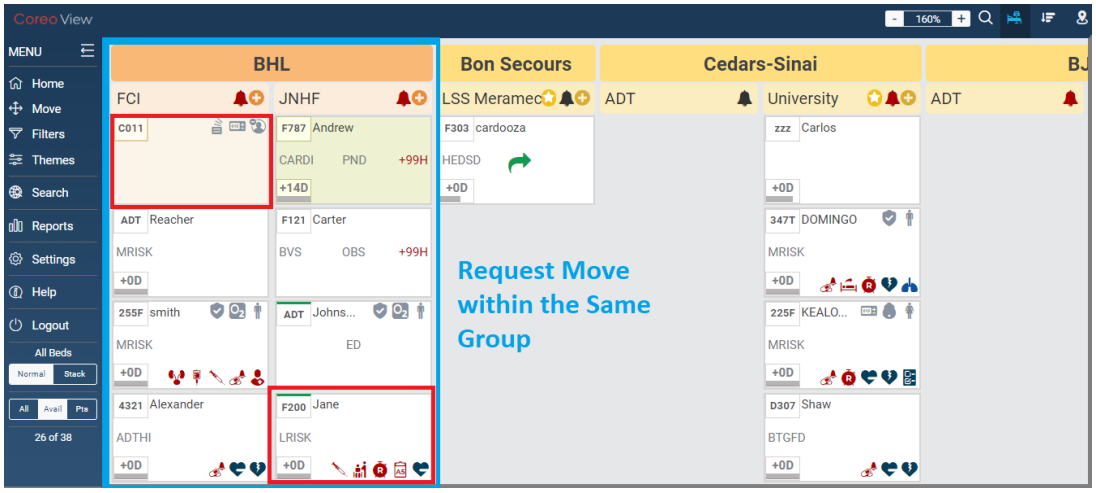


FIGURE 31. BED VIEW LAYOUT–PATIENT MOVE WITHIN THE SAME GROUP

You can notice that the patient is moved to the destination bed from the origin bed.

3.5.3 Request Move–Moving Patients across Different Groups

When you move a patient on request from one bed to another bed across different groups (though within the same group-type), Coreo View prompts you to discharge the patient before moving the patient to the destination bed.

Once you complete the patient discharge process in the **Summary** window in the origin bed, the patient moves to the destination bed.

Follow these steps to move a patient from a bed cell to another bed cell across different locations:

1. Open the Bed View layout and on the side menu select **Move**. **Move** remains highlighted on the side menu during the process of selecting the origin bed and the destination beds. At any point to quit from the process, click **Move** again to clear the selection.
2. Select the patient in the bed cell that you want to move from (origin bed). The bed cell borders change to orange color.

3. Select the destination bed (empty bed cell) belonging to another group to which you want to move the patient. The bed cell borders of the destination bed change to green color, and the **Move Patient** window opens.

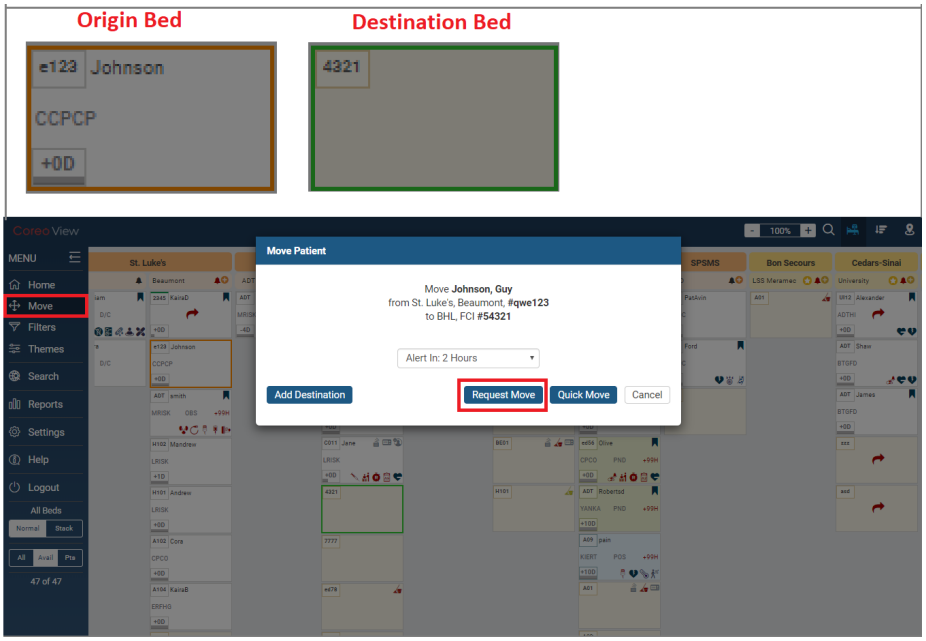


FIGURE 32. MOVE PATIENT WINDOW–REQUEST MOVE BUTTON

4. Select the **Request Move** button to add the destination bed.

The **Move Patient** window closes, and on the bed view layout, an olive-green color move-indicator arrow displays in the origin bed cell and the destination bed cell, indicating that the patient move request is initiated at the origin bed and the destination bed.

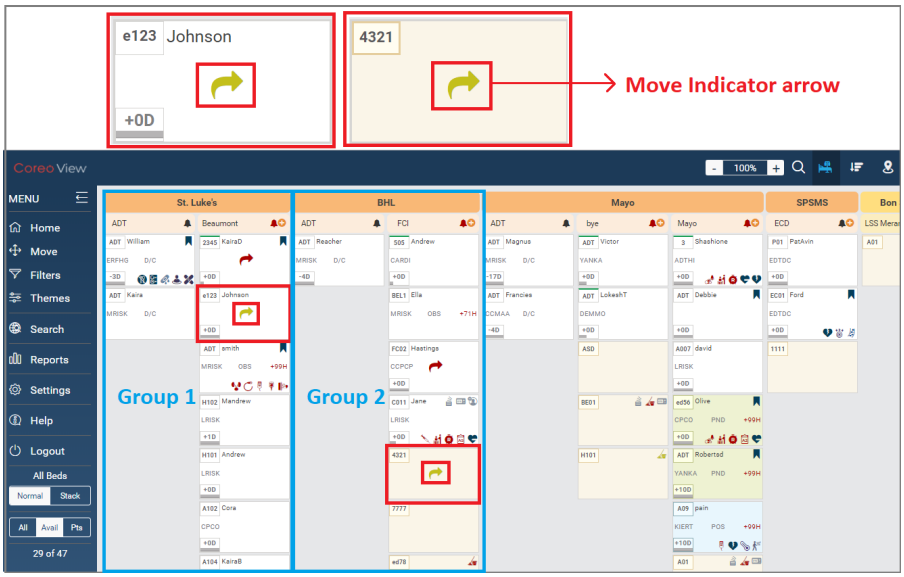


FIGURE 33. BED VIEW LAYOUT–PATIENT MOVE REQUEST INITIATED

5. Select the destination bed cell to open the **Summary** window.

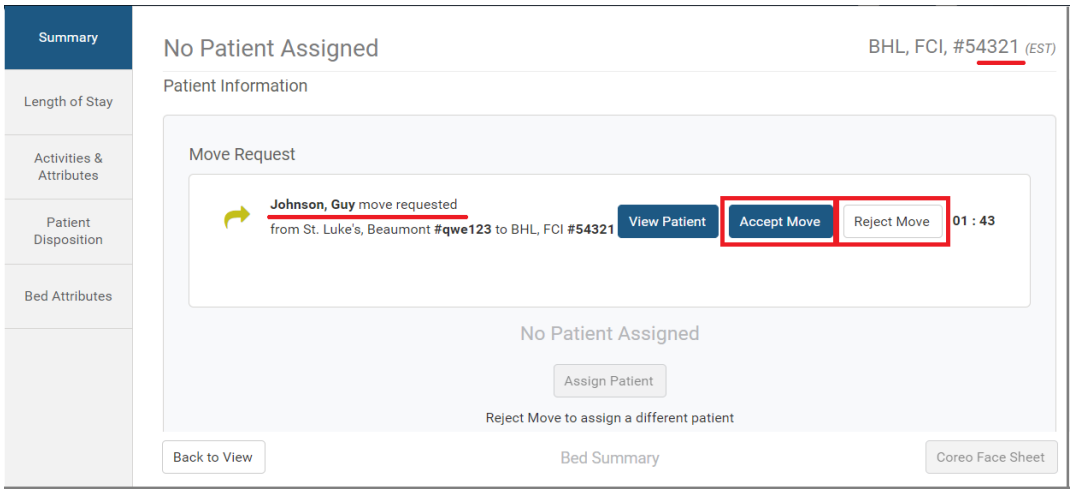


FIGURE 34. SUMMARY WINDOW–MOVE REQUEST INITIATED

In the **Move Request** box, you can view the patient move request details.

6. Select the **Accept Move** button to accept the move request changes. You can also reject the move request by selecting the **Reject Move** button. If rejected, a red arrow displays in the bed cell in the Bed View.

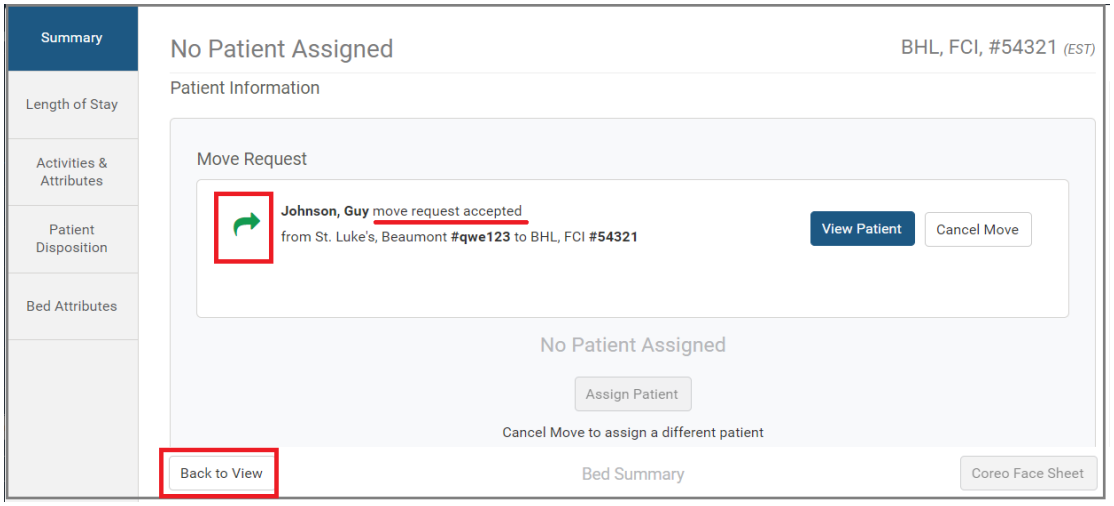


FIGURE 35. SUMMARY WINDOW–MOVE REQUEST ACCEPTED

On accepting the move request, a bright green arrow is displayed. A bright green arrow indicates that you must discharge the patient from the origin bed to further process the patient-move.

7. Select the **Back to View** button to go to the Bed View layout.

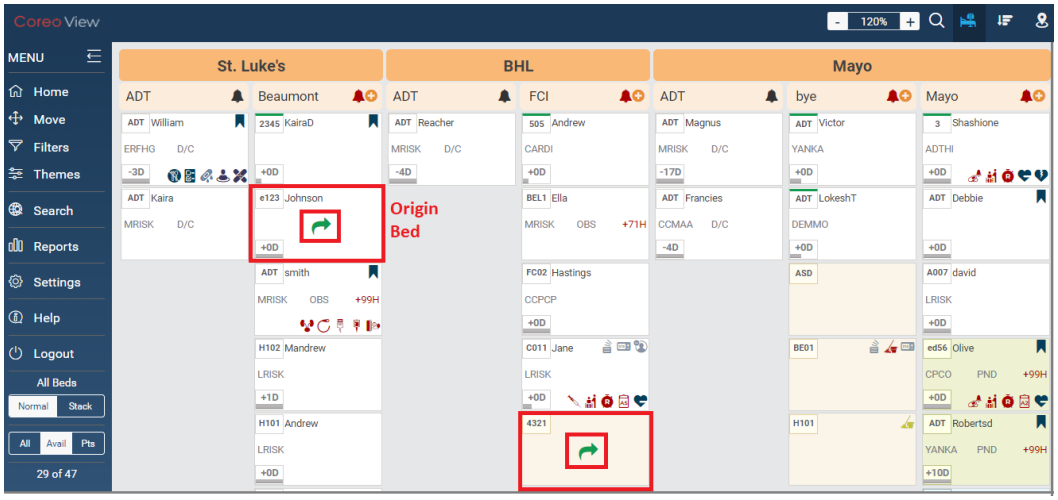


FIGURE 36. BED VIEW LAYOUT

8. Select the origin bed cell to open the **Summary** window.

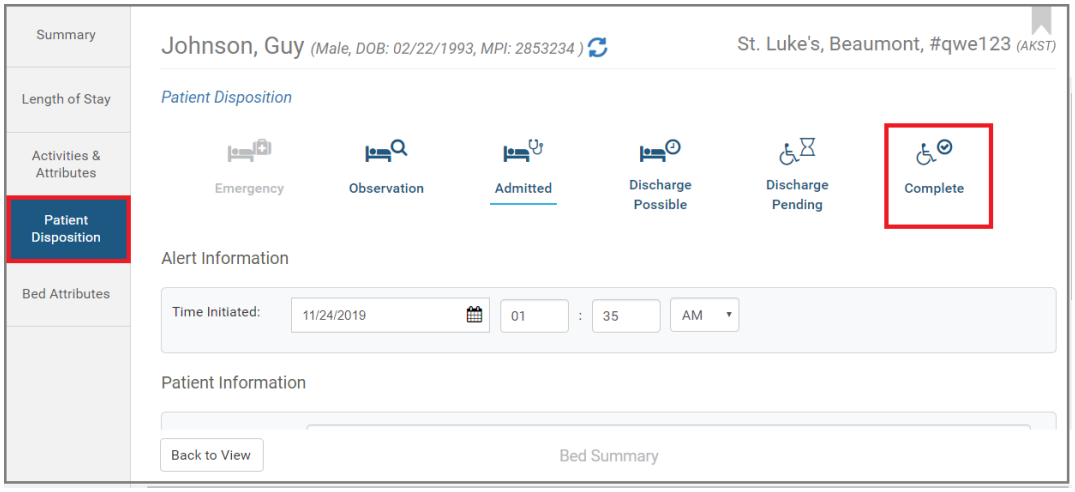


FIGURE 37. SUMMARY WINDOW–PATIENT DISPOSITION TAB

9. Select the **Patient Disposition** tab and select the **Complete** button to complete the patient discharge process.

10. A message box displays asking for your confirmation for the discharge process.

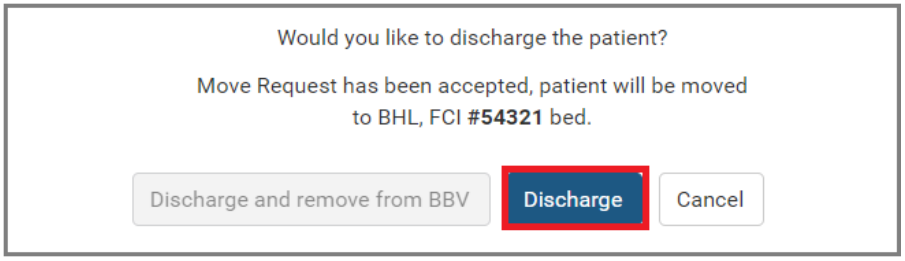


FIGURE 38. CONFIRMATION MESSAGE BOX

11. Select the **Discharge** button to discharge the patient from the origin bed. To cancel the discharge process, you can select the **Cancel** button.

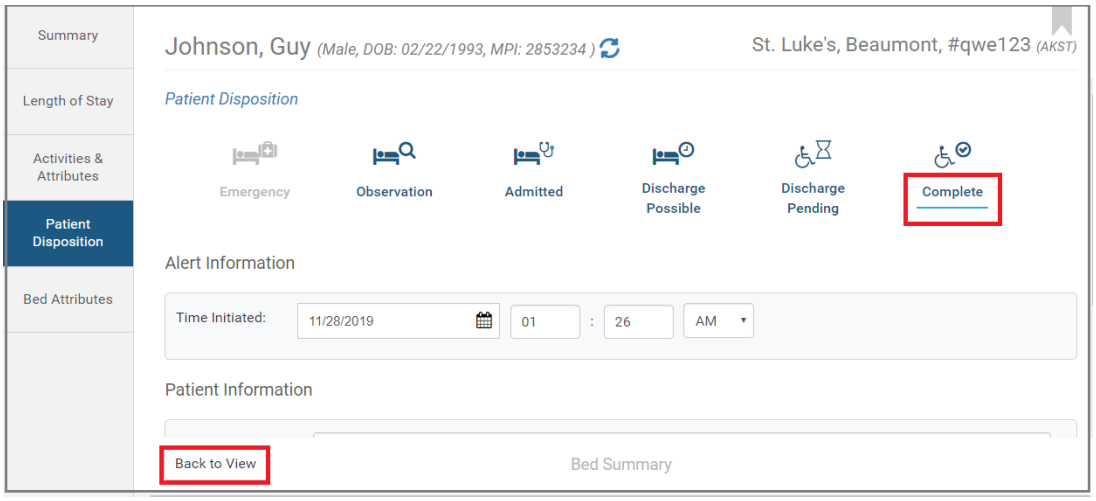


FIGURE 39. SUMMARY WINDOW–DISCHARGE PROCESS COMPLETED

12. A blue line displays below the **Complete** icon on completing the discharge process successfully.

13. Select **Back to View** to go to the Bed View layout.

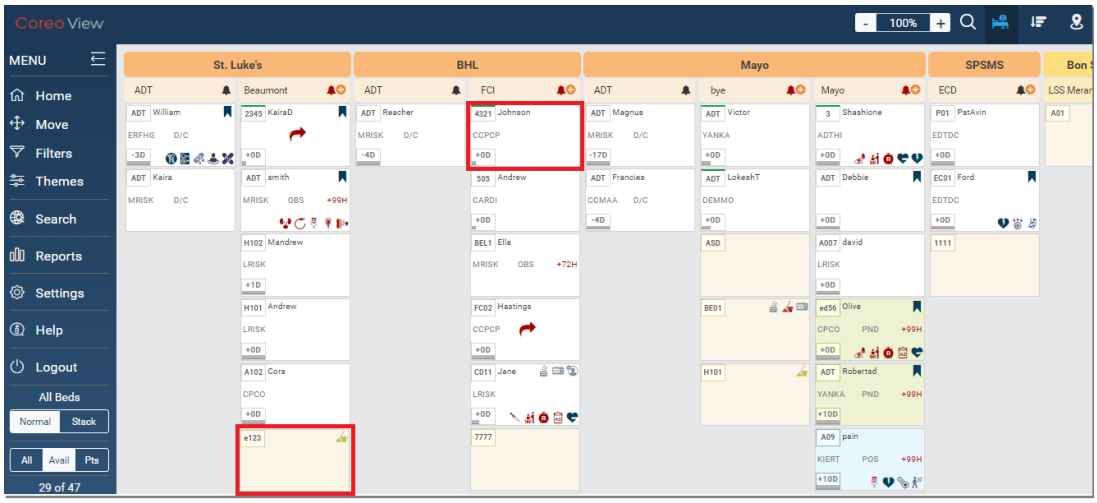


FIGURE 40. BED VIEW LAYOUT–PATIENT MOVED TO THE DESTINATION BED

You can notice that the patient has moved to the destination bed from the origin bed.

3.5.4 Adding Multiple Destinations during Request-Move

Follow these steps to move a patient from one bed to another with the option of adding multiple destination beds:

1. Open the Bed View layout and on the side menu select **Move**. **Move** remains highlighted on the side menu during the process of selecting the origin bed and the destination beds. At any point to quit from the process, click **Move** again to clear the selection.
2. Select the patient in the bed cell that you want to move from (origin bed). The bed cell borders change to orange color.
3. Select the destination bed (empty bed cell) to which you may want to move the patient. The bed cell borders of the destination bed change to green color, and the **Move Patient** window opens.

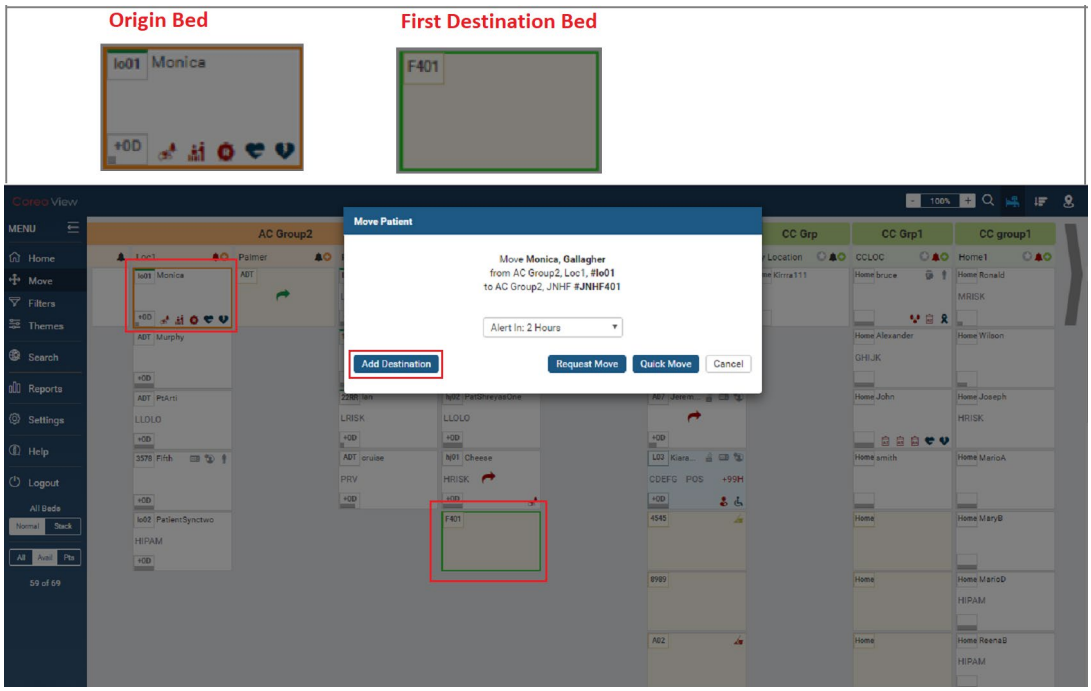


FIGURE 41. MOVE PATIENT WINDOW–ADD DESTINATION BUTTON

4. Select the **Add Destination** button to add the first destination bed. The **Move Patient** window closes.

In the bed view, an olive-green color move-indicator arrow displays in the origin bed cell and the first destination bed cell. This indicates that the patient move request is initiated at the origin bed and the first destination bed.

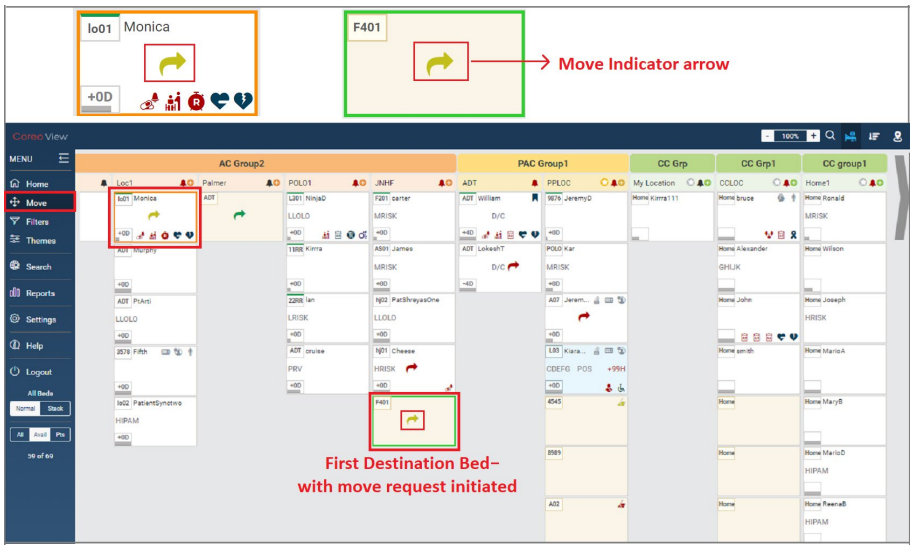


FIGURE 42. BED VIEW LAYOUT–FIRST DESTINATION BED

Move on the side menu remains highlighted because you have selected the **Add Destination** button previously in the **Move Patient** window indicating that you can add more number of destination beds.

5. Select another bed cell to add the second destination bed to which in case you may want to move the patient.
6. The bed cell borders of the second destination bed change to green color and the **Move Patient** window opens.

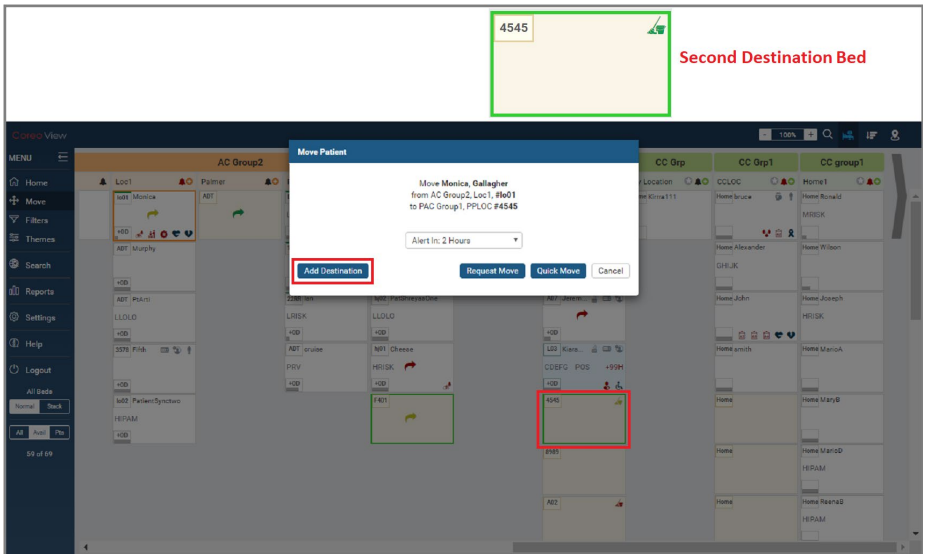


FIGURE 43. MOVE PATIENT WINDOW–ADD DESTINATION BUTTON

7. Select the **Add Destination** button to add the second destination bed.
8. The **Move Patient** window closes, and in the bed view layout, the olive-green color move-indicator arrow displays in the second destination bed cell, indicating that the patient move request is initiated for the second destination bed.

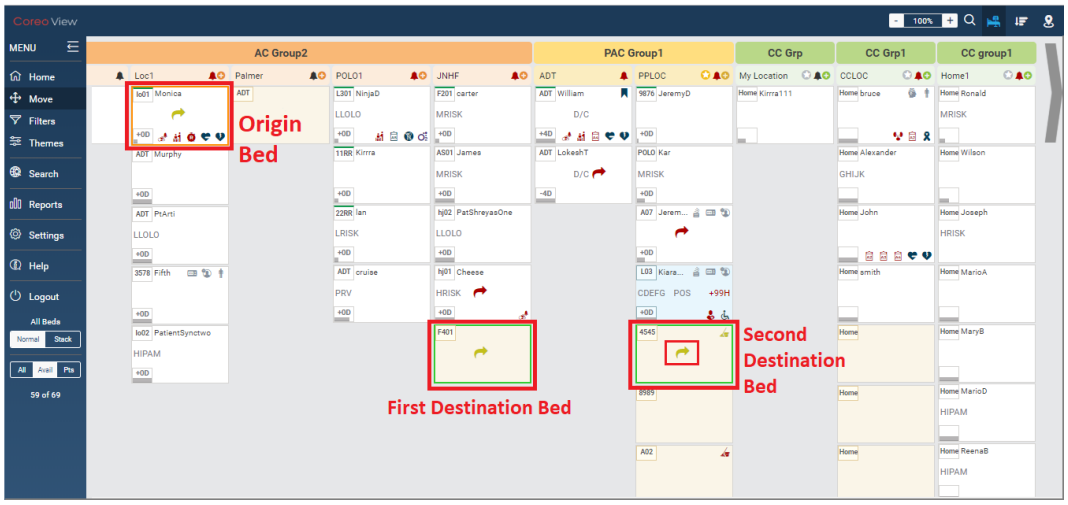


FIGURE 44. BED VIEW LAYOUT–SECOND DESTINATION BED

Move on the side menu remains highlighted because you have selected the **Add Destination** button previously in the **Move Patient** window indicating that you can add more number of destination beds.

9. Select another bed cell to add the third destination bed to which you may want to move the patient.
10. The bed cell borders of the third destination bed change to green color and the **Move Patient** window opens.

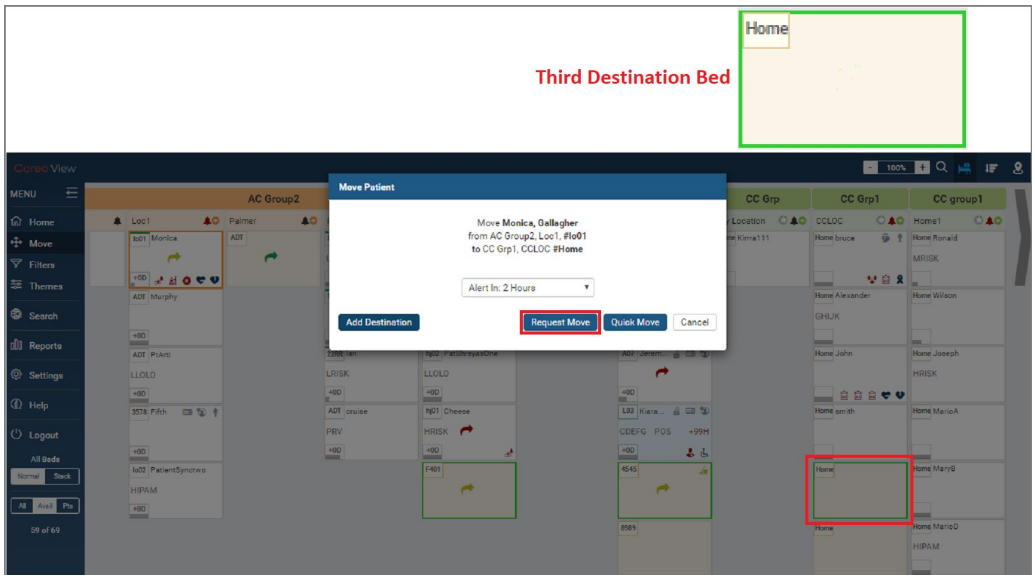


FIGURE 45. MOVE PATIENT WINDOW–REQUEST MOVE BUTTON

11. Select the **Request Move** button to add the third destination bed and process the patient move request.
12. The **Move Patient** window closes, and in the bed view layout, the olive-green color move-indicator arrow displays in the third destination bed cell, indicating that the patient move request is initiated for the third destination bed.

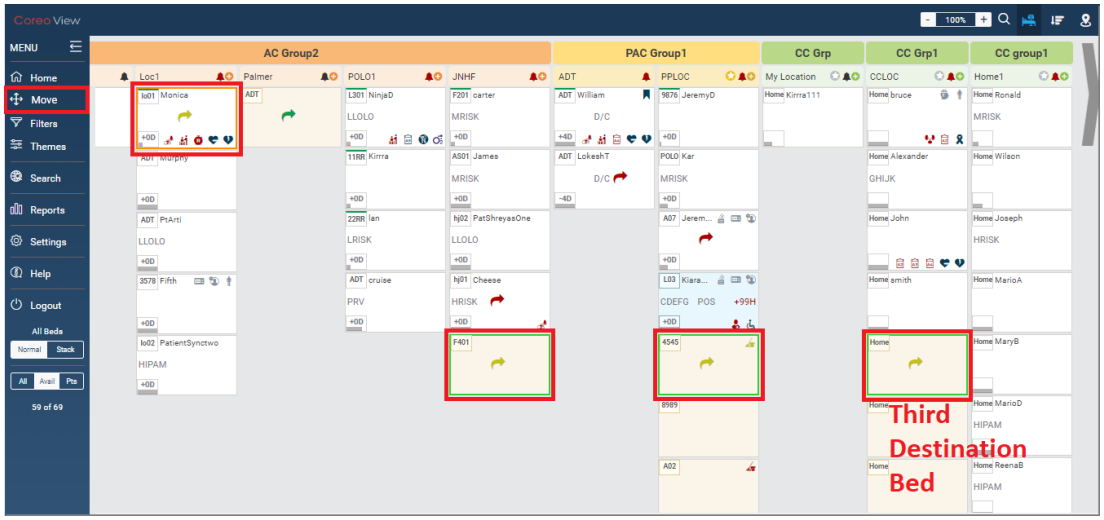


FIGURE 46. BED VIEW LAYOUT–THIRD DESTINATION BED

Notice that the **Move** selection on the side menu is cleared once you select the **Request Move** button in the **Move Patient** window.

13. Select one of the destination beds, *for example, first destination bed,* for which you have initiated the patient move request.

FIGURE 47. SUMMARY WINDOW–ACCEPT MOVE BUTTON

14. Select the **Accept Move** button to accept the patient move request. To reject the move request, you can select the **Reject Move** button.

15. Select the **Back to View** button to go to the Bed View page.

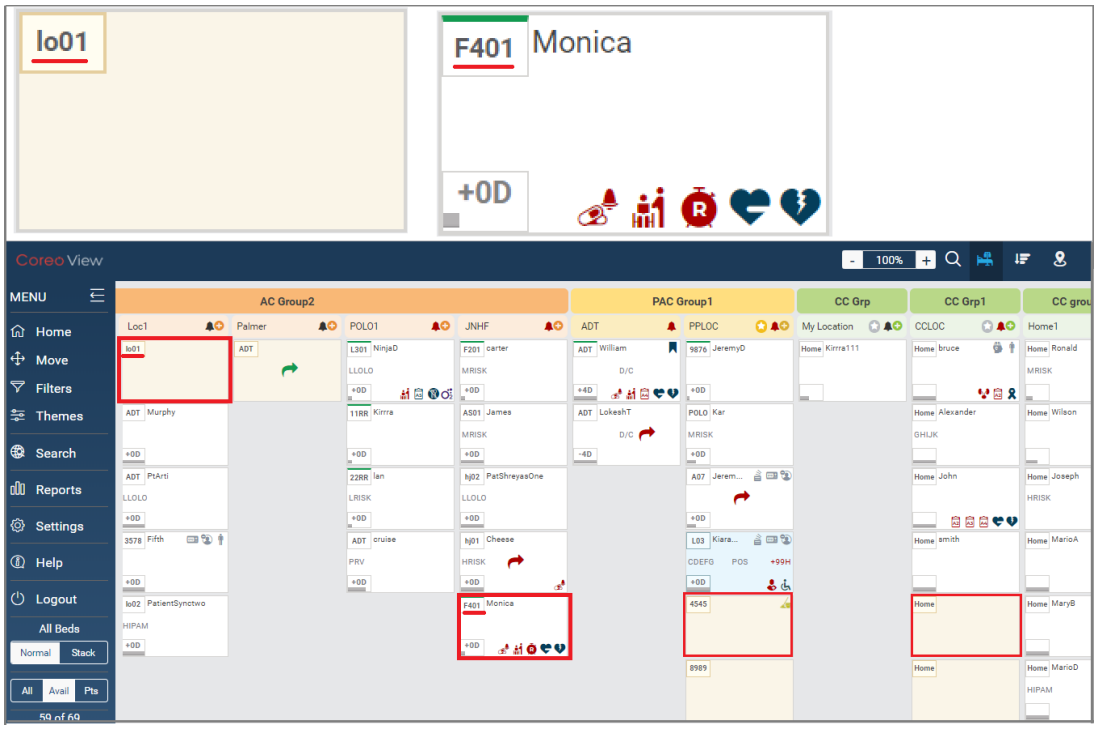


FIGURE 48. BED VIEW LAYOUT-PATIENT MOVED TO THE DESTINATION BED

You can notice that the patient is moved from the origin bed to the destination bed that you chose from the multiple destination beds that you had created.

You can add up to five destination beds; however, your Navvis administrator can change this number as per the hospital's bed management policy.

When you exceed the maximum number of destination beds, the Add Destination button and the Request Move button in the Move Patient window is not available for selection.

4 Prioritized View

Use the **Prioritized view** feature to display the patient details and bed information of the AC group based on the following criteria:

- **Most Recently Admitted – Emergency**
- **My Flagged Patients**
- **Most Inpatient Admissions**
- **Most Emergency Visits**
- **Most Recently Admitted – Inpatient**
- **Most Recently Discharged – Inpatient**
- **Longest Length of Stay**
- **All Patients in Beds**

4.1 Sorting Patient Records

Follow these steps to sort the patient records based on the sorting attribute:

1. On the home page, select the **Prioritized View** button on the Header Bar to display the prioritized view layout.

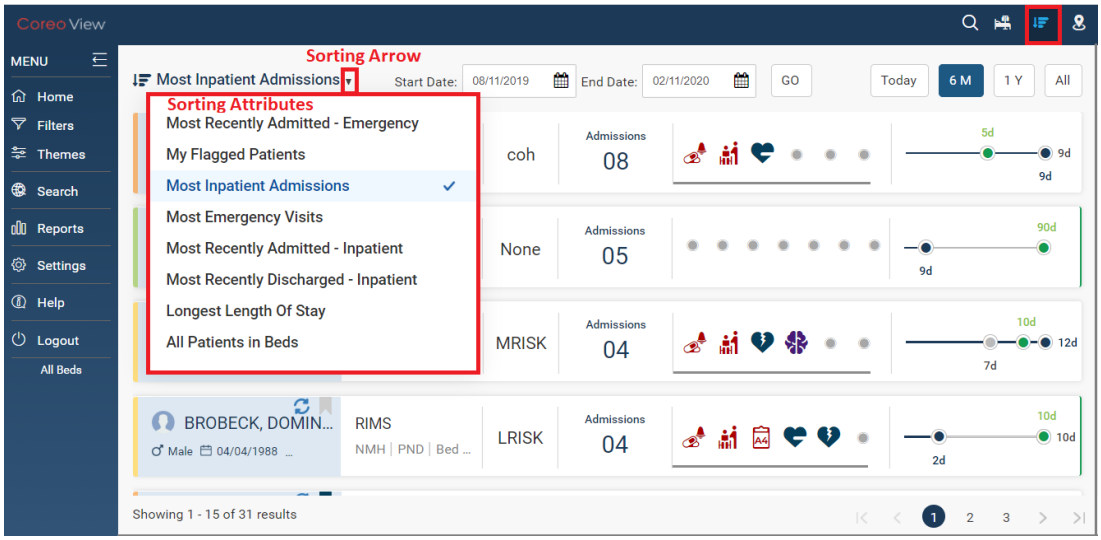


FIGURE 49. PRIORITIZED VIEW–SORTING ATTRIBUTES

2. Select the Sorting arrow and choose the sorting attribute from the following list, based on which you want to sort the patient information.

- **Most Recently Admitted – Emergency**
- **My Flagged Patients**
- **Most Inpatient Admissions**
- **Most Emergency Visits**
- **Most Recently Admitted – Inpatient**
- **Most Recently Discharged – Inpatient**
- **Longest Length of Stay**
- **All Patients in Beds**

The screen layout of the prioritized view for each of the sorting attributes is similar. However, the UI elements differ based on the attribute that you select.

Each sorting attribute and its features are detailed in the following sections.

4.2 Sorting Attribute–Most Recently Admitted-Emergency

Follow these steps to view the list of patients that are most recently admitted to the Emergency department in the AC facility:

1. In the Prioritized View layout, click the Sorting arrow and select the **Most Recently Admitted-Emergency** sorting attribute.

The latest admitted patients to the Emergency department display at the top of the list.

Each patient record displays in a row and is called Card View.

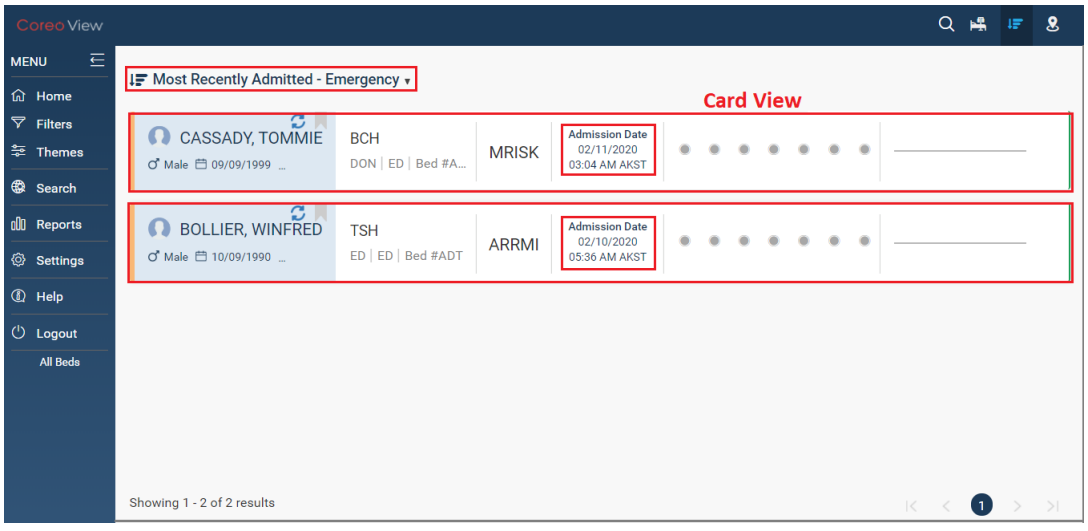


FIGURE 50. PRIORITIZED VIEW – MOST RECENTLY ADMITTED-EMERGENCY

The patients admitted in the Emergency state are sorted based on the date and time of admission. The emergency patient with the latest date and time of admission is listed at the top.

This list shows only those patients who are still in the Emergency facility and not the patients who are discharged from the Emergency state.

Refer to the following table for information on the **Admission Date** box:

Element name	Description
 **Admission Date**	The date and time at which the patient was admitted to the Emergency facility. The patient with the latest admission time and date displays at the top of the list, and the patients admitted at a later date display towards the end of the list. Coreo View sorts the patient records in the decreasing order of the patient admission time and date.

Table 6. PRIORITIZED VIEW – EMERGENCY PATIENT ADMISSION DATE DETAILS

The details of each box in the card view and the tab page that opens in the **Summary** window on clicking each of these boxes in explained in the following sections.

4.3 Sorting Attribute–My Flagged Patients

Flag a patient record for the following reasons:

- When a patient in Coreo Analytics is not assigned to any bed (AC, PAC, or CC) in the Bed View and yet needs to be monitored in Coreo View.
- Flag a patient who is assigned to a bed cell under one of the care-level groups, AC, PAC, or CC in the bed view, if you want to mark the patient as a favorite for monitoring purposes.

Follow these steps to view all the flagged patient in Coreo View:

1. In the Prioritized View layout, click the Sorting arrow and select the **My Flagged Patients** sorting attribute. All the patients that are flagged in the Bed View are displayed.

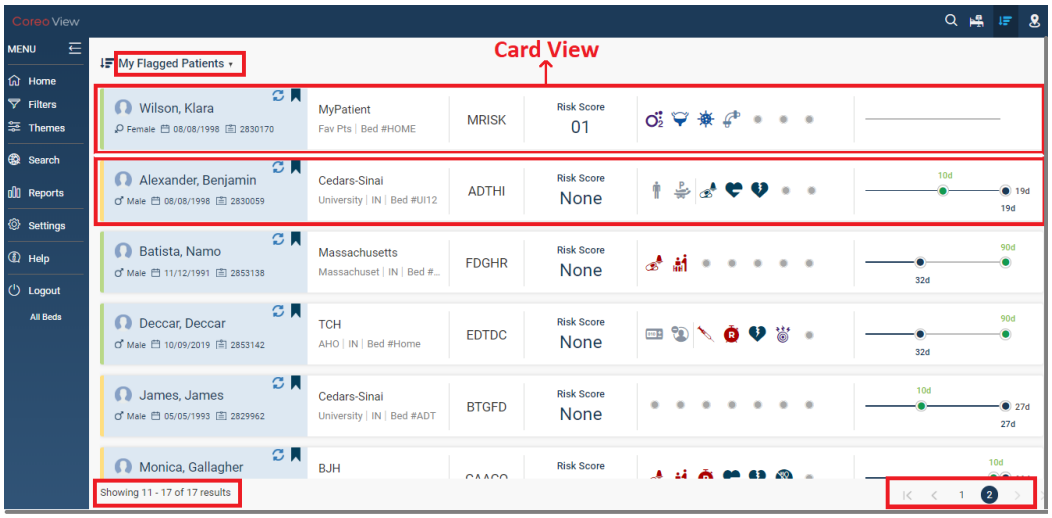
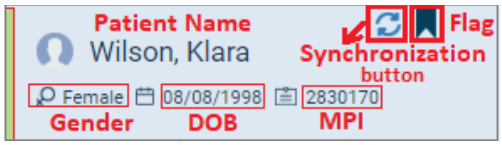
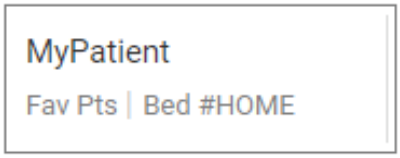
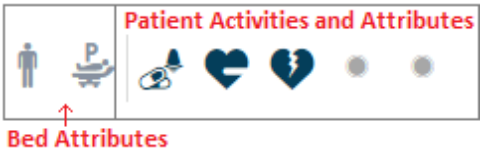
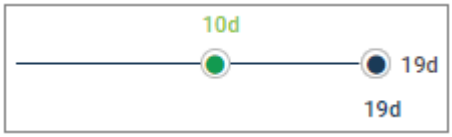


FIGURE 51. PRIORITIZED VIEW–MY FLAGGED PATIENTS

Refer to the following table for the details of each box in the card view of the flagged patient records:

Element name	Description
 Patient Name box	Displays the full name, gender, date of birth, and the MPI (Master Patient Index) of the patient The navy-blue color flag icon indicates that the patient is in the flagged state. The MPI is a unique identification number generated for each patient in the Coreo application. The Patient Name box has a color bar on the left side, which shows the group (AC-Orange, PAC-Yellow, and CC-Green) to which the patient belongs. Click the Synchronization button to view the same patient record in another Coreo application.

 Group Name box	Displays the group name, location, and the identification number of the bed to which the patient is assigned
 Patient Cohort box	Displays the cohort group to which the patient is assigned in the Coreo application
 Risk Score box	The high risk, medium risk, or low-risk score of the patient matching the cohort.
 Patient Attributes box	Displays the patient attributes for a Coreo patient who is not assigned to a bed in Coreo View
 Bed Attributes box Patient Activities box and Attributes box	Displays the bed attributes and the activities and attributes of a patient assigned to a bed in one of the groups (AC, PAC, or CC) in Coreo View
 Length of Stay Indicator box 	The patient's length of stay in the facility expressed in the number of days.

Showing 11 - 17 of 17 results	The results (*Example 17*) show the total count of flagged patients. The final results on the Prioritized View page (E*xample 17*) matches with the flagged patient count on the Bed View. You can view ten patient records at a time on a page.
1 2 Pagination	Displays the total number of page numbers in which the patient records are displayed. Use the left arrow to navigate to the starting pages and the right arrow to navigate to the following pages.

Table 7. CARD VIEW ELEMENTS

2. Click any box in the Card View. The **Patient Details** window or the **Summary** window opens based on whether the patient is assigned to any bed in the bed view.

When you flag those Coreo patients who are not assigned to any bed in either of the three groups (AC, PAC, or CC), then Coreo View automatically assigns such patients to a distinct group and location. The **Patient Details** window opens for that patient who is in a distinct group. The distinct group and location are set by your administrator and this group and location displays in the bed view layout under the CC group-type.

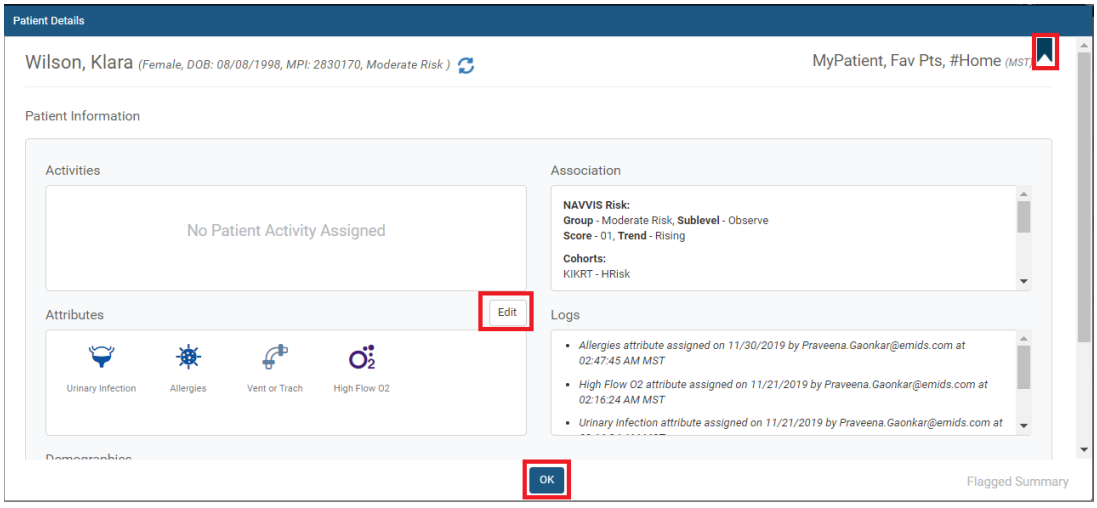


FIGURE 52. PATIENT DETAILS WINDOW

i. View these details in the **Patient Details** window:

- **Associations:** Patient Associations include Group, Sublevel, Risk Score, Trend, Cohorts, and other related details.
- **Attributes**: Select the **Edit** button to add or remove the attributes assigned to the patient.
- **Logs**: View and track the activities and updates made to the patient record by the user-role who has access and permission to modify the patient details in the Logs section.
- **Demographics**: View the address and the contact details of the patient.

ii. Select the **Flag** button in the upper-right corner of the window if you choose to unflag the patient record and remove it from the distinct group.

iii. Click the **OK** button to close the **Patient Details** window.

The **Summary** window opens for that patient who is assigned to a bed in one of the three groups (AC, PAC, or CC) in the **Bed View**.

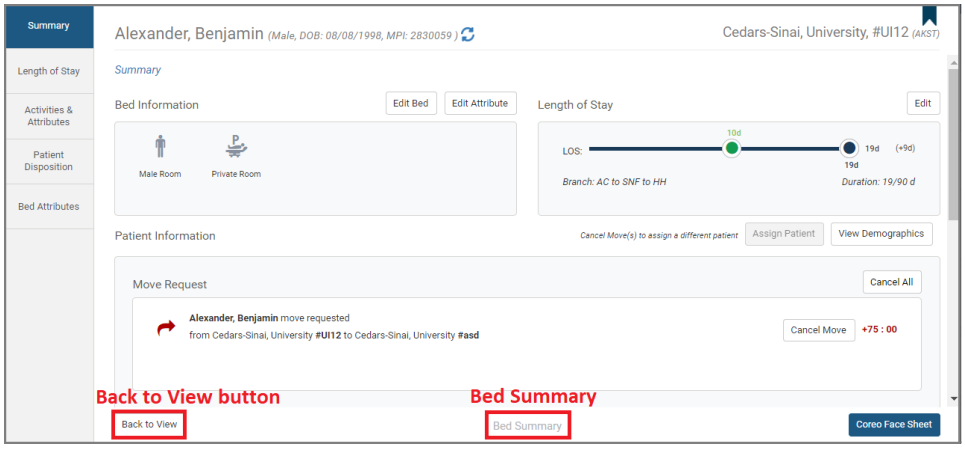


FIGURE 53. SUMMARY WINDOW

Bed Summary-display indicates that the patient is assigned to a bed in Coreo View.

3. Click the **Back to View** button to close the **Summary** window.

4.4 Sorting Attribute—Most Inpatient Admissions

Follow these steps to view the list of inpatients with the most number of admissions:

1. In the Prioritized View layout, click the Sorting arrow and select the **My Inpatient Admissions** sorting attribute.

A list of inpatients with repeated admissions display. The patient who has the most number of admissions to the AC and PAC facility displays at the top of the list and this number reduces as you go down the page.

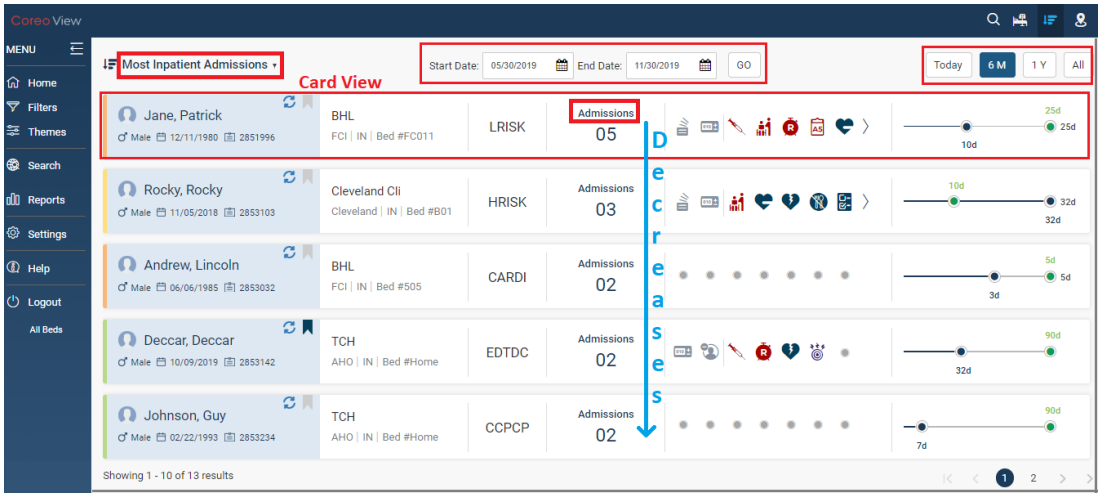


FIGURE 54. PRIORITIZED VIEW – MOST INPATIENT ADMISSIONS

The Prioritized View layout and the Card View for the **Most Inpatient Admissions** record and the **Flagged Patient** record are similar, except for a few changes which are detailed below:

Element name	Description
Start Date box	Select the starting date of the period for which the inpatient record details with the most number of admissions must display.
End Date box	Select the ending date of the period for which the inpatient record details with the most number of admissions must display.
Go button	Select the **Go** button to display the inpatient records with the most number of admissions.
Today button	Select the **Today** button to view the most inpatient admissions for the current date.

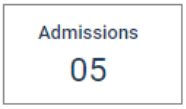
6M button	Select the **6M** button to view the inpatient records with the most number of admissions for the previous six months from the current date.
1Y button	Select the **1Y** button to view the inpatient records with the most number of admissions for the previous one year from the current date.
All button	Select the **All** button to view all the inpatient admission records.
 Card View- **Admissions**	Displays the total number of times a patient is admitted to the AC or PAC group facility The patient who has the most number of admissions to the AC or PAC group facility displays at the top of the list, and this number reduces as you go down the page.

Table 8. PRIORITIZED VIEW LAYOUT ELEMENTS–MOST INPATIENT ADMISSIONS

2. Click any box in the card view.

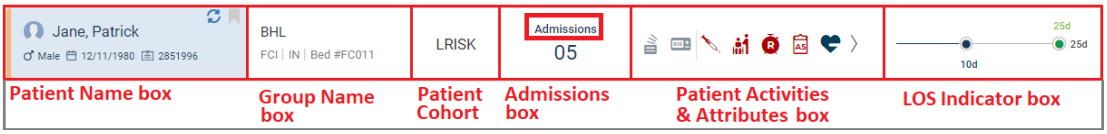
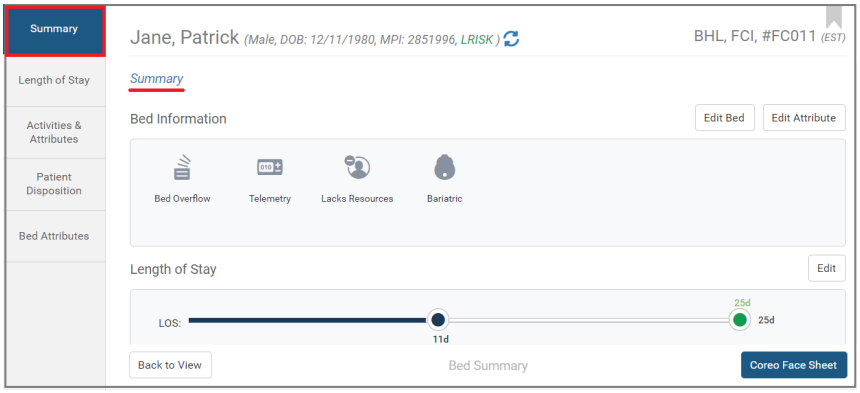
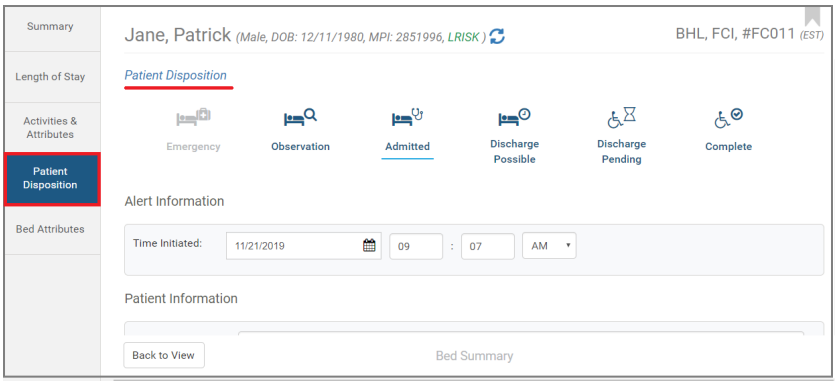
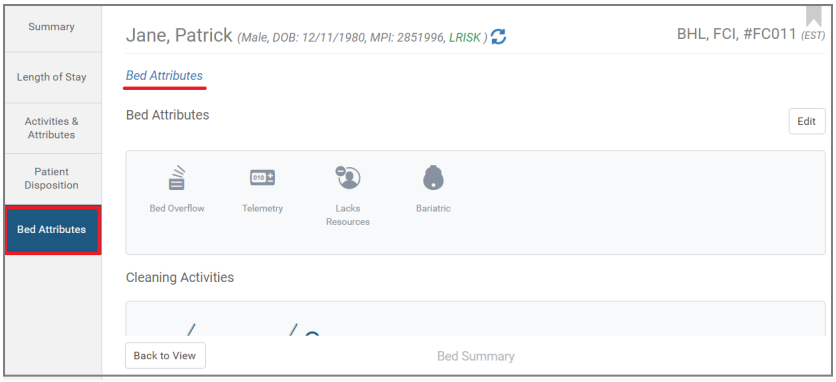
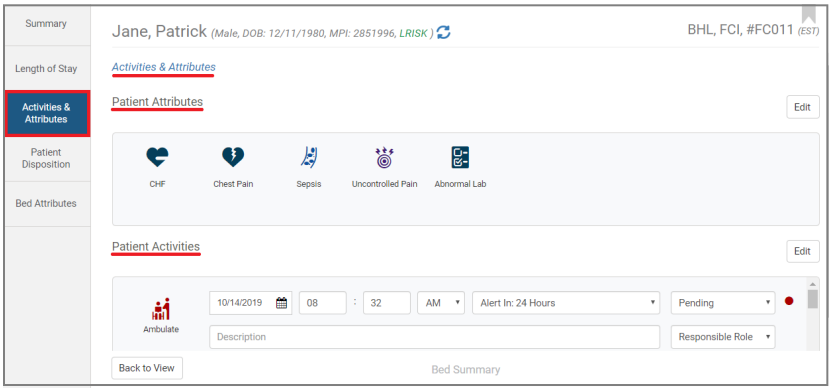


FIGURE 55. BOXES IN THE CARD VIEW

The **Summary** window opens on different tab pages based on the box that you select in the card view.

Refer to the following table below to view the tab pages that open in the **Summary** window for the box that you click in the card view.

Click this box in the card view:	This tab page opens in the Summary window
Patient Name box Group Name box Admissions box	**Summary** tab page 

Patient Cohort box	**Patient Disposition** tab page 
Bed Attributes box	**Bed Attributes** tab page 
Patient Activities and Attributes box	**Patient Activities and Attributes** tab page 

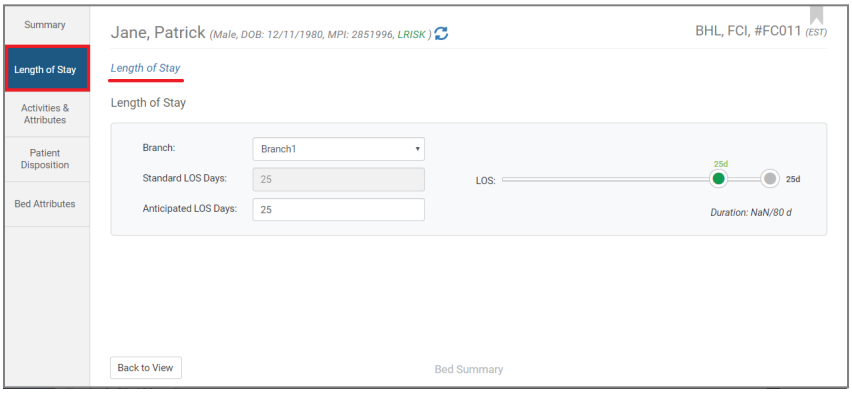
Length of Stay (LOS) Indicator box	**Length of Stay** tab page 

Table 9. CARD VIEW BOX AND THE CORRESPONDING TAB PAGE

4.5 Sorting Attribute—Most Emergency Visits

Follow these steps to view the list of patients with the most number of emergency visits to the Acute Care (AC) facility:

1. In the Prioritized View layout, click the Sorting arrow and select the **Most Emergency Visits** sorting attribute.

A list of patients with the most number of emergency visits to the AC facility display. The patient with the most number of emergency visits displays at the top of the list, and the one with the least number displays as the last patient record.

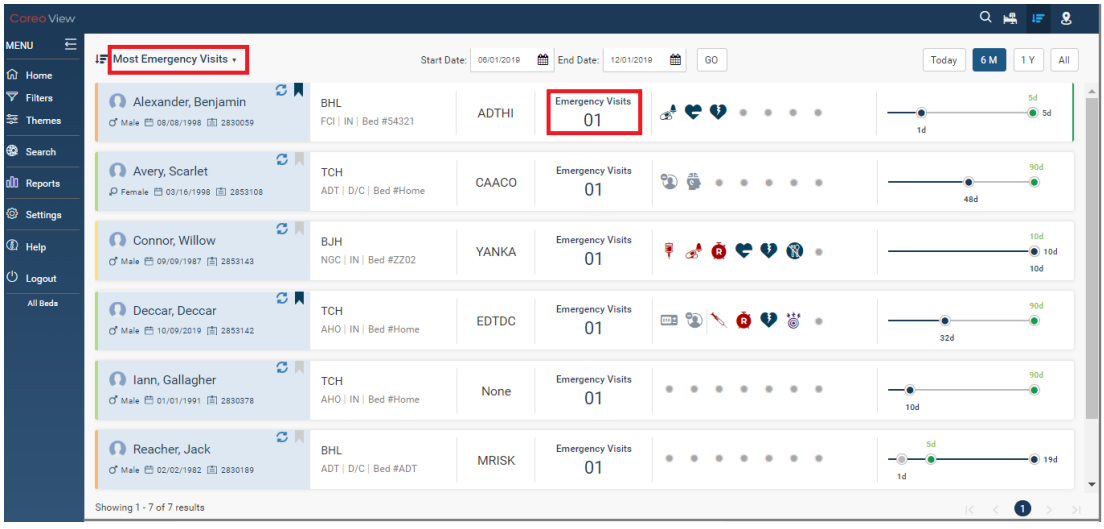


FIGURE 56. PRIORITIZED VIEW – MOST EMERGENCY VISITS

The Prioritized View layout and the Card View of the **Most Inpatient Admission** are almost similar to that of the **Most Emergency Visits**, except for the **Emergency Visits** box. The patient records display in a decreasing order based on the most number of emergency visits made by the patient.

Refer to the following table for information on the **Emergency Visits** box:

Element name	Description
 **Emergency Visits**	The number of emergency visits made by the patient to the AC facility The patient with the most number of emergency visits displays at the top of the list, and the one with the least number displays as the last patient record.

Table 10. PRIORITIZED VIEW – MOST EMERGENCY VISITS

2. Click any box in the card view to open the **Summary** window and you can edit the patient information in the window.

4.6 Sorting Attribute—Most Recently Admitted - Inpatient

Follow these steps to view the list of inpatients with most recent admissions:

1. In the Prioritized View layout, click the Sorting arrow and select the **Most Recently Admitted – Inpatient** sorting attribute.

A list of patients with latest admission time displays. The patient with the most recent admission time displays at the top of the list, and the patients admitted earlier display towards the end of the list.

Coreo View sorts the patient records in decreasing order of the admission time.

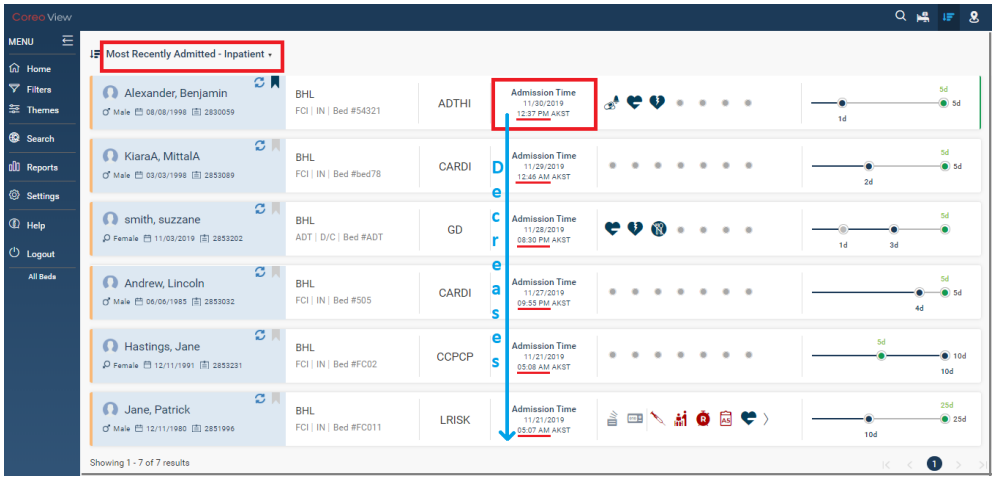


FIGURE 57. PRIORITIZED VIEW – MOST RECENTLY ADMITTED - INPATIENT

Refer to the following table for information on the **Admission Time** box:

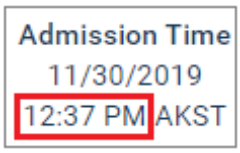
Element name	Description
 **Admission Time**	The time at which the patient was admitted to the facility. The patient with the most recent admission time displays at the top of the list, and the patients admitted earlier display towards the end of the list. Coreo View sorts the patient records in decreasing order of the admission time.

Table 11. Prioritized View – Patient Admission Time Details

2. Click any box in the card view to open the **Summary** window and you can also edit the patient information in the window.

4.7 Sorting Attribute—Most Recently Discharged - Inpatient

Follow these steps to view the list of inpatients with most recent discharges from the facility:

1. In the Prioritized View layout, click the Sorting arrow and select the **Most Recently Discharged – Inpatient** sorting attribute.

A list of patients with latest discharge time displays. The patient with the most recent discharge time displays at the top of the list, and the patients discharged earlier display towards the end of the list.

Coreo View sorts the patient records in decreasing order of the patient discharge time.

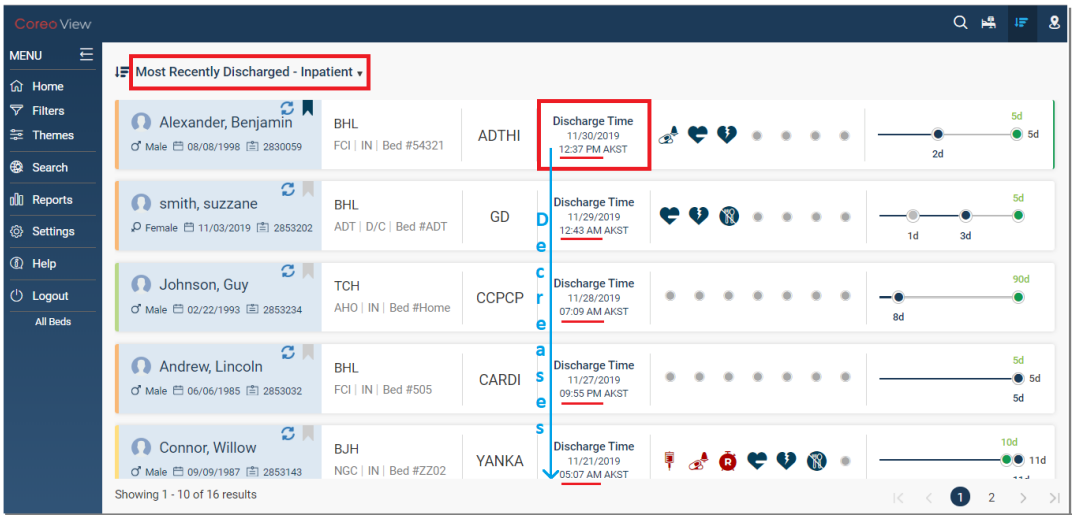


FIGURE 58. Prioritized View – Most Recently Discharged - Inpatient

Refer to the following table for information on the **Discharge Time** box:

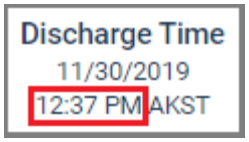
Element name	Description
 **Discharge Time**	The time at which the patient was discharged from the facility. The patient with the most recent discharge time displays at the top of the list, and the patients discharged earlier display towards the end of the list. Coreo View sorts the patient records in decreasing order of the patient discharge time.

Table 12. Prioritized View – Patient Discharge Time Details

2. Click any box in the card view to open the **Summary** window and you can edit the patient information in the window.

4.8 Sorting Attribute—Longest Length of Stay

Follow these steps to view the list of inpatients with the most extended stay in a group across group-types (AC, PAC, or CC):

1. In the Prioritized View layout, click the Sorting arrow and select the **Longest Length of Stay** sorting attribute.

A list of patients with the most extended length of stay in a facility displays. The patient with the most extended length of stay (in days) displays at the top of the list and the patients with shorter lengths of stay display towards the end of the list.

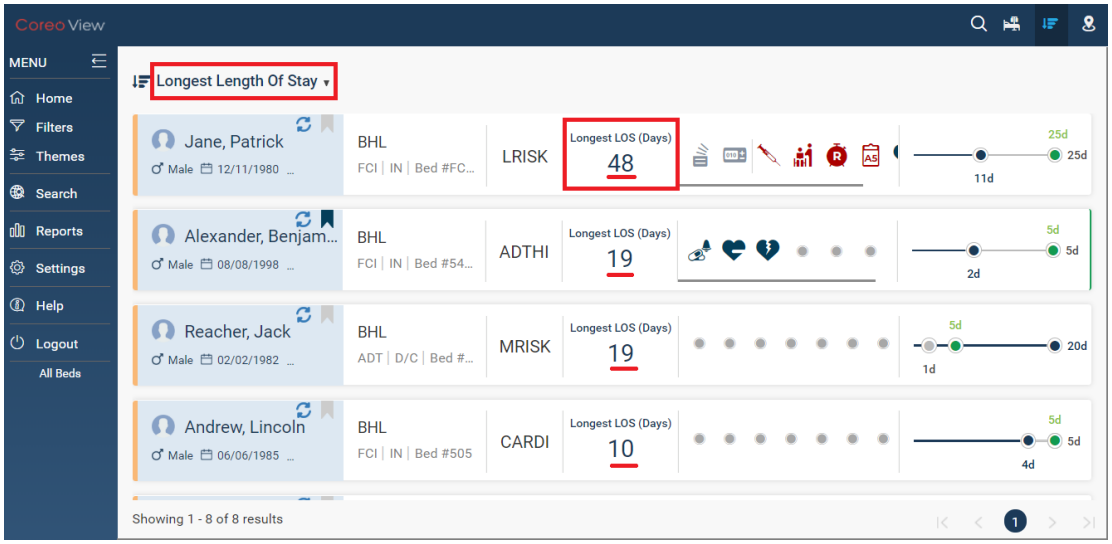


FIGURE 59. Prioritized View – Longest Length of Stay (LOS)

Refer to the following table for information on the **Longest LOS (Days)** box:

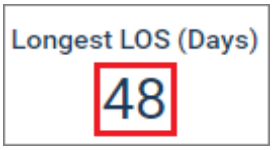
Element name	Description
 **Longest LOS**	The longest length of stay of the patient in days in the facility in a group (AC, PAC, or CC).

Table 13. PRIORITIZED VIEW – PATIENT'S LENGTH OF STAY DETAILS

2. Click any box in the card view to open the **Summary** window and you can edit the patient information in the window.

4.9 Sorting Attribute—All Patients in Beds

Follow this step to view all the patients that are present in the bed view across all the three group types (AC, PAC, and CC):

1. In the Prioritized View layout, click the Sorting arrow and select the **All Patients in Beds** sorting attribute.

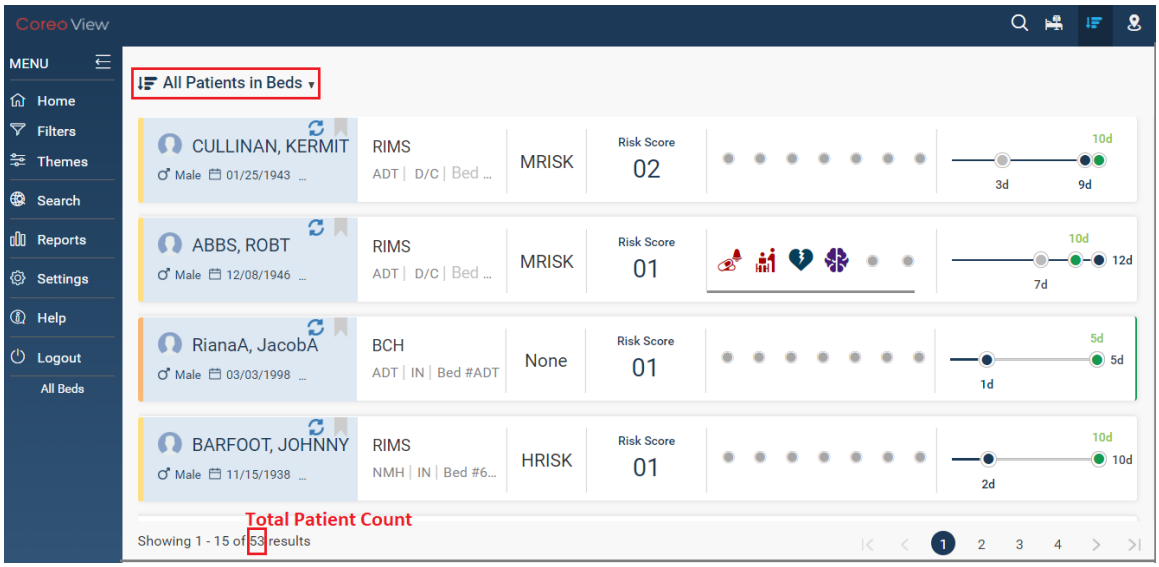


FIGURE 60. PRIORITIZED VIEW – ALL PATIENTS IN BEDS

All the patients that are present in the bed view display here. The total patient count that is shown here is same as that displayed in the bed view.

5 Geomap View

Use the **geomap view** feature to display the patient details associated with the location on a geographical map, to locate the community resources available in the neighborhood, and to access social services for the patients.

5.1 Geomap Plotting

Coreo View gives you the functionality to plot the groups, locations, and the patients in the geomap view layout.

You can locate the geographical position of hospital groups, their locations, and the patients assigned to them.

You can plot the geomap for the following Network types:

- Acute Care group type
- Post-Acute Care group type
- Cross Continuum group type

You can plot the geomap for the following community services:

- Food
- Transit
- Goods
- Housing
- Health
- Money
- Legal
- Multi Category

5.2 Acute Care

1. On the home page, select the Geomap View button on the header bar to display the Geomap View layout.

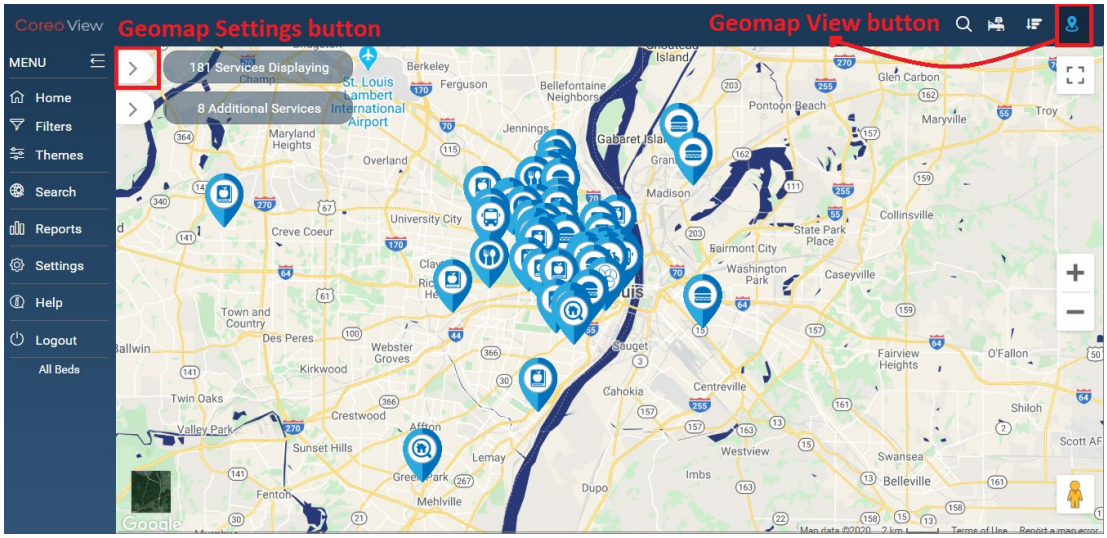


FIGURE 61. GEOMAP VIEW LAYOUT–GEOMAP SETTINGS BUTTON

2. Click the **Geomap Settings** button to open the **Geomap Settings** pane on the left side of the screen.

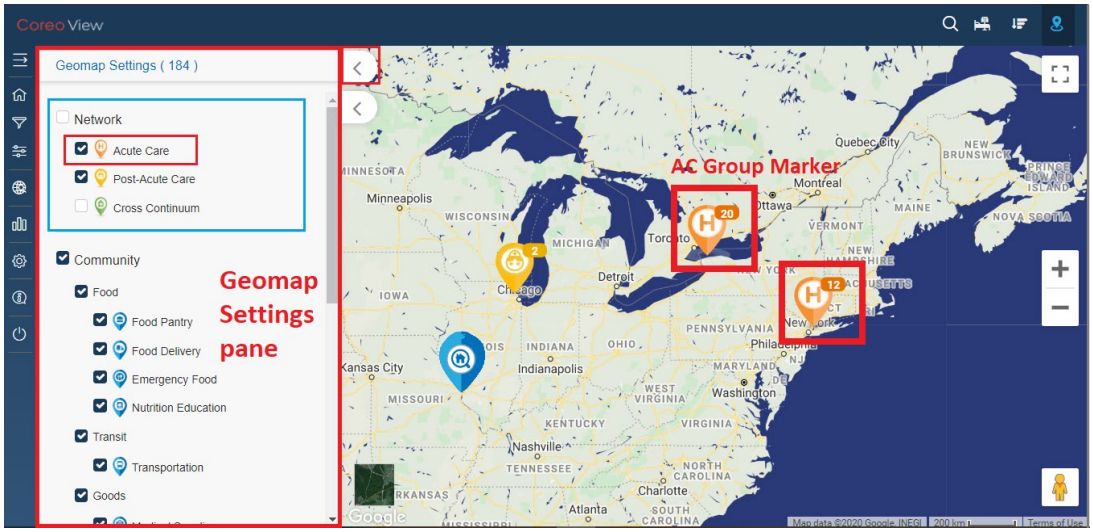


FIGURE 62. GEOMAP VIEW LAYOUT–GEOMAP SETTINGS BUTTON

3. In the default settings, the **Cross Continuum** group check box is not selected.
4. If the **Acute Care** check box is not already selected, select the **Acute Care** check box.

5. Select the AC group marker. The Acute Care group information panel opens as a small pop-up window. To view only the AC group markers, clear the **Post-Acute Care** check box and the **Community** check box in the **Geomap Settings** pane.

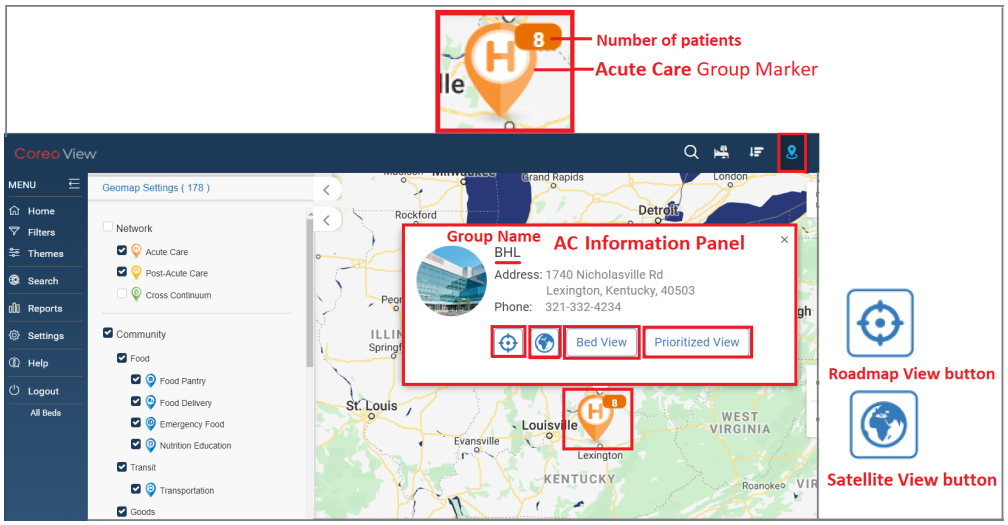


FIGURE 63. GEOMAP VIEW–ACUTE CARE GROUP INFORMATION PANEL

For the AC group, the Geomap View displays as many AC group markers as many AC groups in the Bed View.

For example, if there is just one group under Acute Care in the Bed View, you can view only one AC group marker in the Geomap View.

The AC information panel displays the following information:

- The AC group name
- The address at which the group is located
- Phone number
- Roadmap View button: Displays the roadmap view for the AC group
- Satellite View button: Displays the satellite view for the AC group
- Bed View button: Displays the selected AC group and its related patient records in the bed view
- Prioritized View button: Displays the selected AC group and its related patient records in the PV

The group displays as a marker on the Geomap View only if it has a valid address (You can assign the address for the AC group in the Add Group window under Settings. Refer to the Administrative Guide for more information on creating groups)

5.2.1 AC Information Panel–Bed View button

Follow these steps to drill down on a group name in the Bed View from the AC information panel:

1. Select the **Bed View** button in the AC information panel. The Bed View layout opens. The number of patients displayed in the AC group marker and that on the Bed View matches.

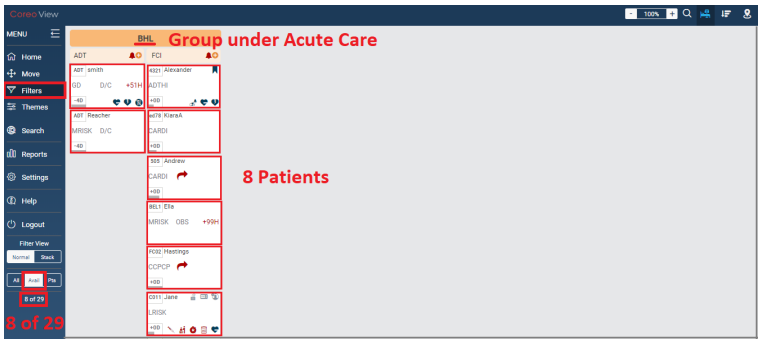


FIGURE 64. BED VIEW LAYOUT

You can notice that **Filters** on the side menu is highlighted, indicating that the Bed View is displaying patient records filtered based on the **Acute Care** group that you have selected in the AC group information panel in the bed view. Refer to the Filters and Themes topic in this user guide for more information on how to apply filters.

5.2.2 AC Information Panel–Prioritized View Button

Follow these steps to drill down on a group name in the Prioritized View from the AC information panel:

1. Select the Geomap View button on the header bar to go to the Geomap View layout.
2. Select the Prioritized View button in the information panel to open the Prioritized View (PV) layout. The default sorting for the PV layout is **Most Inpatient Admissions**.

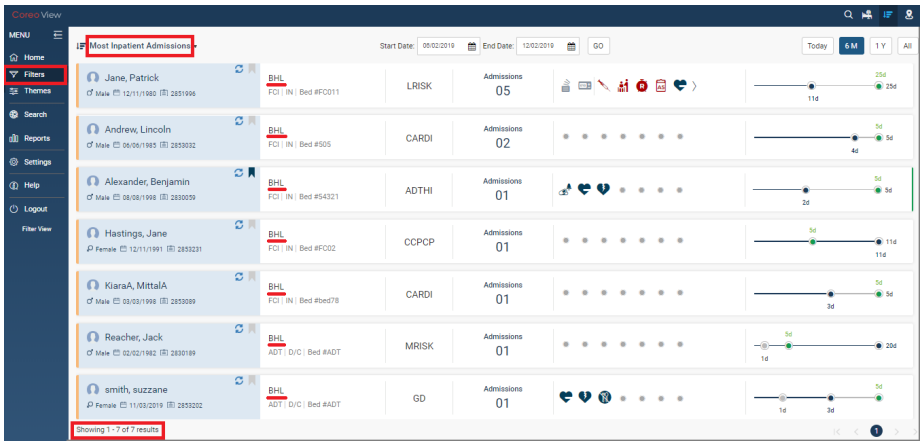


FIGURE 65. PRIORITIZED VIEW LAYOUT–MOST INPATIENT ADMISSIONS

The **Most Inpatient Admission** list is displayed only for that AC group that you have selected from the AC group information panel in the Geomap View.

You can notice that **Filters** on the side menu is highlighted, indicating that the PV layout is displaying most inpatient admission records filtered based on the **Acute Care** group that you have selected in the AC group information panel on the bed view.

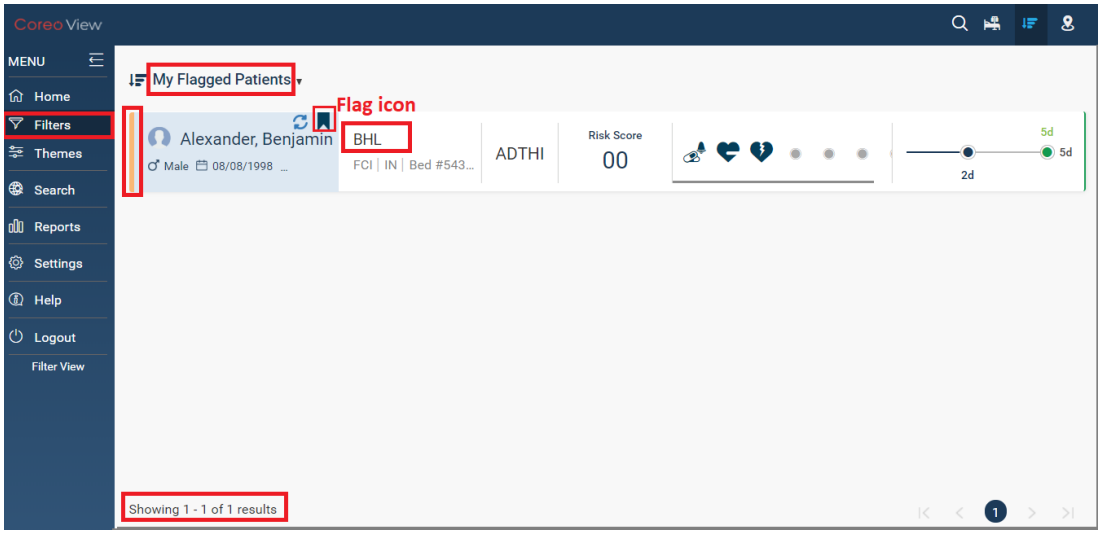


FIGURE 66. PRIORITIZED VIEW LAYOUT–MY FLAGGED PATIENTS

3. Select the **My Flagged Patients** sorting attribute. The flagged patient list is displayed only for that AC group that you have selected from the AC group information panel on the Geomap View.

The patient count in the AC group marker on the Geomap View and that on the PV does not match because the AC group filter criterion that you select on the Geomap View applies on an already sorted list on the PV.

Similarly, you can select any sorting attribute on the PV for which you want to view the patient records for the AC group that you select on the Geomap View.

5.2.3 AC Information Panel–Roadmap View button

1. Select the **Geomap View** button on the header bar to go to the Geomap View layout.
2. Select the **Roadmap View** button in the information panel.

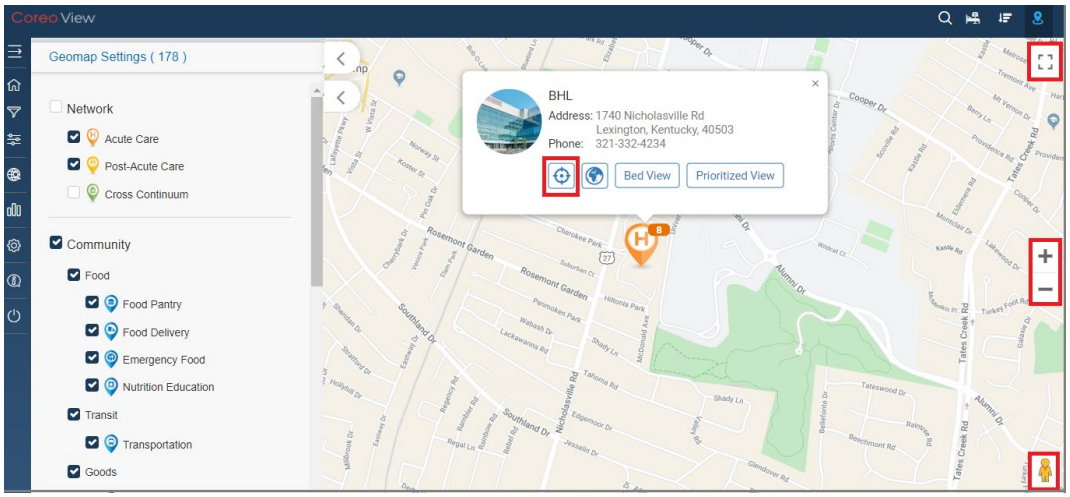


FIGURE 67. AC GROUP INFORMATION PANEL–ROADMAP VIEW BUTTON

View the roadmap of the geographical location within 200 meters in which the AC group is located.

5.2.4 AC Information Panel–Satellite View button

1. Select the **Satellite View** button in the information panel.

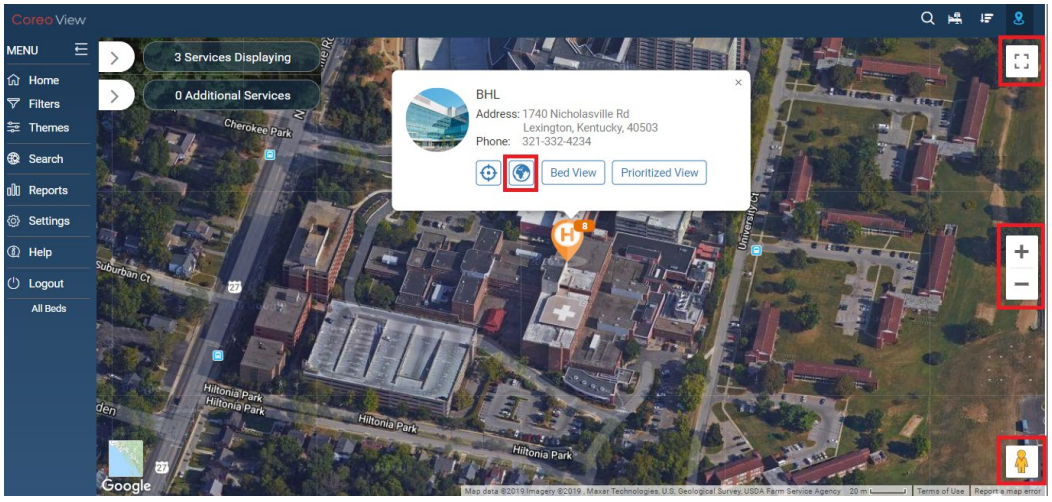


FIGURE 68. AC GROUP INFORMATION PANEL–SATELLITE VIEW BUTTON

You can view the satellite map of the geographical location within 20 meters in which the AC group is located.

2. Select the Toggle Full Screen icon to view the full-screen mode. Select the same button to exit the full-screen view.
3. Select the Magnification icon to zoom in (+) the size of the map layout, or to zoom out (–) the size of the map layout.
4. Select the Pegman icon to zoom into the street view imagery. Care teams can walk through a street-level view to understand geographic conditions and help with care navigation.

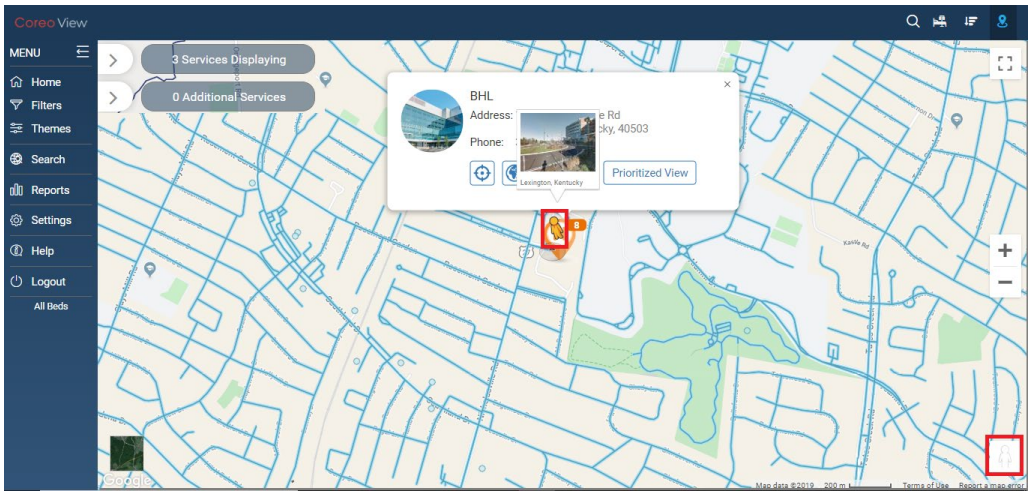


FIGURE 69. PEGMAN ICON

5. Drag the Pegman icon from the lower-right corner of the map and place the icon at the desired site to zoom into the street view imagery.

FIGURE 70. STREET VIEW

6. Use the navigation arrows to move back and forth in the street view.
7. Select the Compass button to rotate the street view.
8. Select the Exit arrow to exit the street imagery view.

5.2.5 Search Feature

Follow these steps to perform a local search of a patient, or a location, or a group, in the Geomap View.

1. In the Geomap View, select the **Search** icon on the header bar.
2. Enter the keyword to search for the details in the **Keyword search** box. You can enter the group names under AC, PAC or CC, location names, patient-first name, patient-last name, MPI, Bed ID, Risk group, among others.
3. Select the **Search** button on the header bar. The AC group, PAC location, or CC patient markers display in the Geomap view based on the search attribute that you enter.

For example, if the search attribute is the patient name, and if the patient is located in a group under AC, then the AC group marker displays.

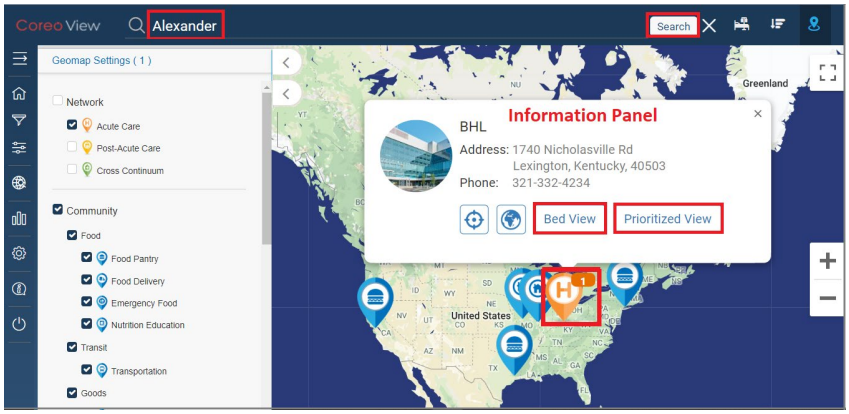


FIGURE 71. GEOMAP LAYOUT–SEARCH FEATURE

4. Select the marker to open the information panel.
5. Select the **Bed View** button in the information panel. The bed view layout opens.

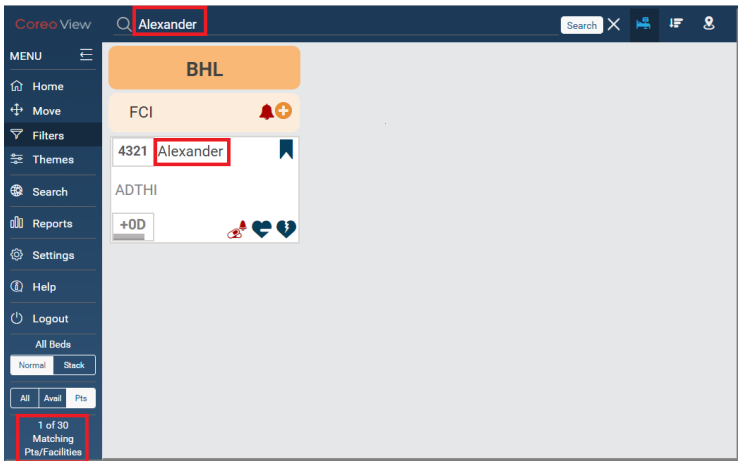


FIGURE 72. BED VIEW LAYOUT

Coreo View filters the information based on the search attribute and displays only the relevant data in the Bed View layout.

6. Similarly, select the **Prioritized View** button in the information panel in the Geomap view.

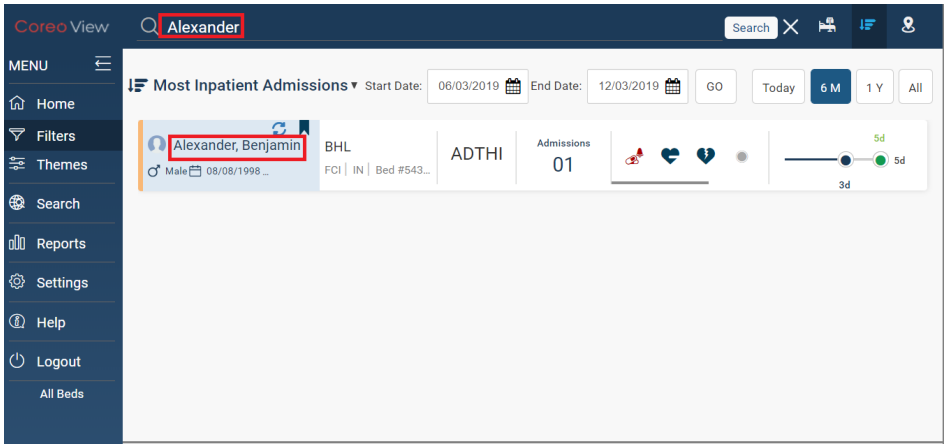


FIGURE 73. PRIORITIZED VIEW LAYOUT

The patient records in the Prioritized View show based on the sorting attribute, start date, end date, and duration. The default sorting attribute being the **Most Inpatient Admissions**, the **Start Date** and the **End Date** being the current date, and **6M** the default duration for which the patient records are displayed.

5.3 Post-Acute Care

1. On the home page, select the **Geomap View** button on the header bar to display the Geomap View layout.
2. Click the **Geomap Settings** button to open the **Geomap Settings** pane.
3. Select the **Post-Acute Care** check box if not already selected. The PAC locations are plotted as location markers and not the PAC group names.

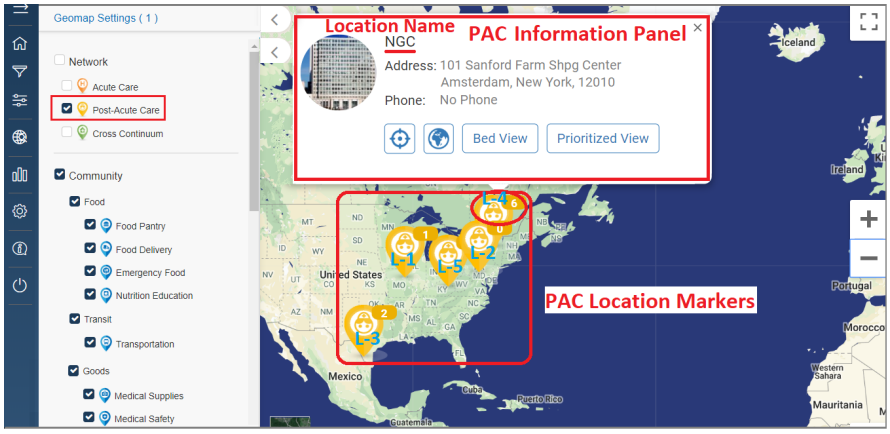


FIGURE 74. GEOMAP VIEW LAYOUT–PAC INFORMATION PANEL

4. Select the PAC group–location marker. The PAC group information panel opens as a small pop-up window. For the PAC group, the geomap view displays as many PAC group location markers as many PAC locations in the Bed View.

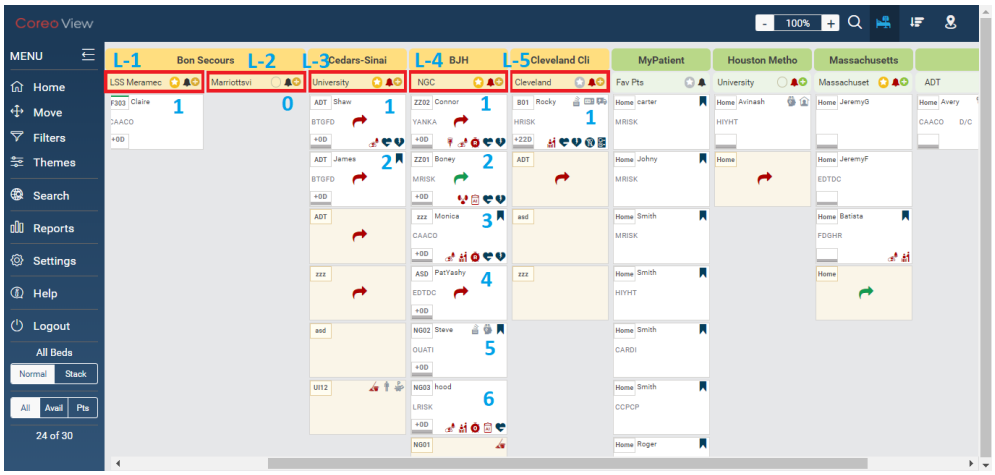


FIGURE 75. BED VIEW LAYOUT-PAC LOCATIONS

For example, if five locations belong to four different groups under Post-Acute Care in the Bed View, you can view five PAC group–location marker in the Geomap View.

The PAC information panel is similar to the AC information panel, except that the location name and address display instead of the group name and group address.

5.3.1 PAC Information Panel–Bed View button

Follow these steps to drill down on a location name in the Bed View from the PAC information panel:

1. Select the **Bed View** button in the PAC information panel. The Bed View layout opens. The number of patients displayed in the PAC location marker and that on the Bed View matches.

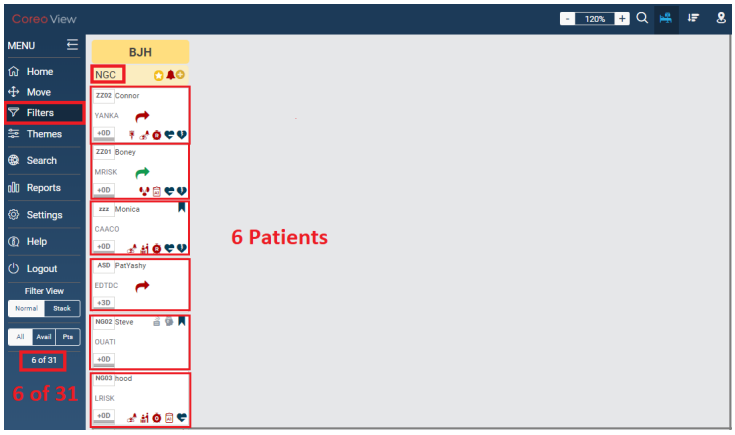


FIGURE 76. BED VIEW LAYOUT

You can notice that **Filters** on the side menu is highlighted, indicating that the Bed View is displaying patient records filtered based on the PAC location that you have selected in the PAC group information panel in the bed view.

2. You can select **Filters** on the side menu to view the filter criterion.

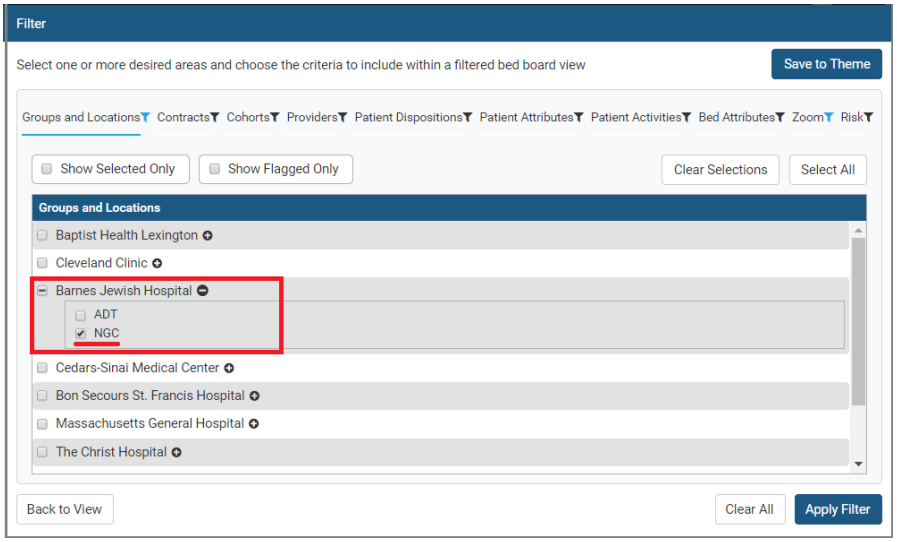


FIGURE 77. FILTER WINDOW

Refer to the Filters and Themes topic for more information on how to apply filters.

5.3.2 PAC Information Panel–Prioritized View Button

Follow these steps to drill down on a location name in the Prioritized View from the PAC information panel:

1. Select the **Geomap View** button on the header bar to go to the Geomap View.
2. Select the **Prioritized View** button in the information panel to open the **Prioritized View** (PV) layout. The default sorting for the PV layout is **Most Inpatient Admissions**.

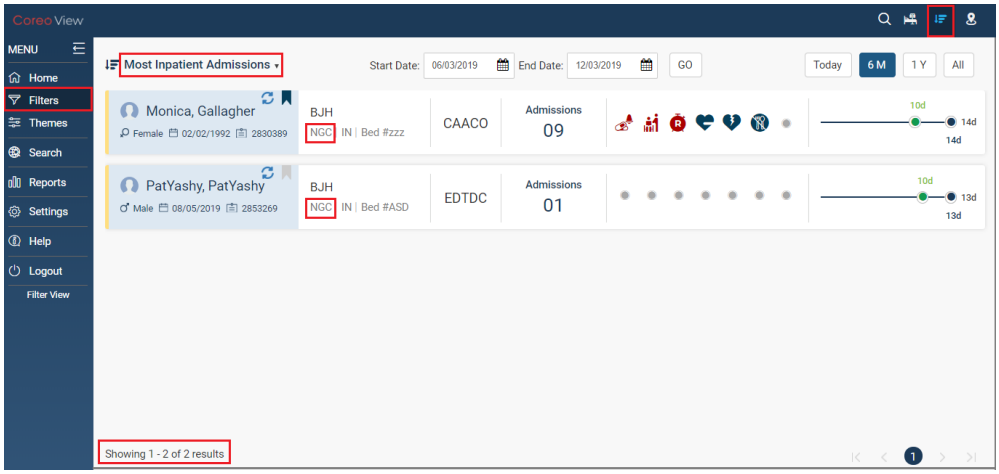


FIGURE 78. PRIORITIZED VIEW LAYOUT

The patient count in the PAC location marker on the Geomap View and that on the PV does not match because the PAC location filter criterion that you select on the Geomap View applies on an already sorted list on the PV.

You can select any sorting attribute on the PV for which you want to view the patient records for the PAC group location that you select on the Geomap View.

The **Roadmap-View** button, the **Satellite View** button, the Toggle Full Screen icon, the Magnification icon, and the Pegman icon function as explained for the AC information panel.

5.4 Cross Continuum

1. On the home page, select the **Geomap View** button on the header bar to display the Geomap View layout.
2. Select the **Geomap Settings** button to open the **Geomap Settings** pane.
3. Select the **Cross Continuum** check box, you can notice that the CC group–patient marker does not open because the patients are located in their home locations.
4. Enter the patient name, the group name, the location name, or any other search attributes such as MPI in the **Search** box to display the CC group–patient marker.

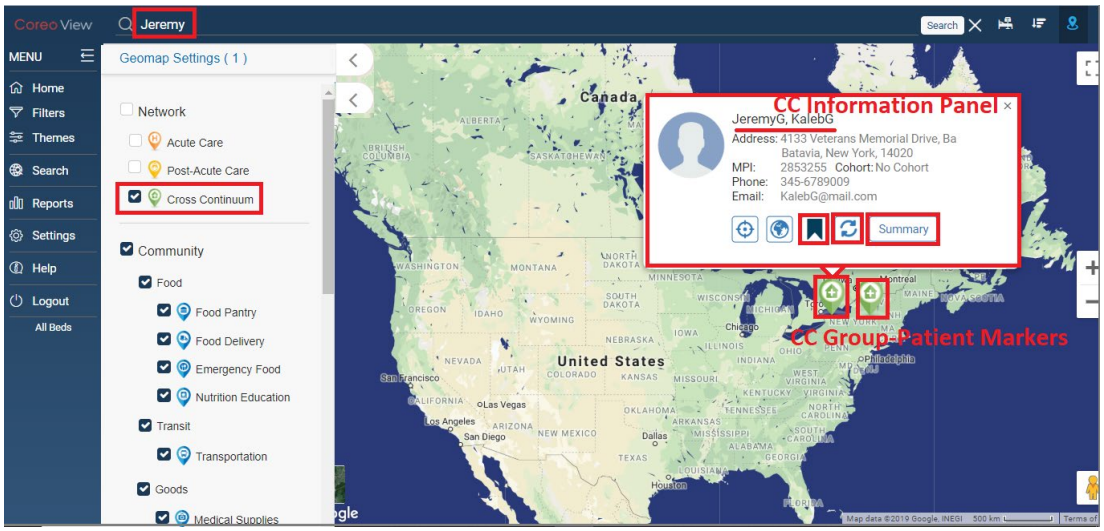


FIGURE 79. GEOMAP VIEW LAYOUT–CC INFORMATION PANEL

5. Select the CC group–patient markers. The CC group-patient information panel opens as a small pop-up window. The patient details, including name, address, MPI, and cohort group display in the information panel.

The **Roadmap View** button, the **Satellite View** button, the **Flag** icon, the **Synchronization** button, and the **Summary** button are available in the information panel.

6. The Roadmap View button and the Satellite View button function, as explained under the **Acute Care** section.
7. Select the **Flag** icon to flag the patient, or if the patient is already flagged, you can unflag the patient.
8. Select the Synchronization button to synchronize the patient record with that in the other Coreo applications.
9. Select the **Summary** button to open the **Summary** window and view the bed summary of the patient.

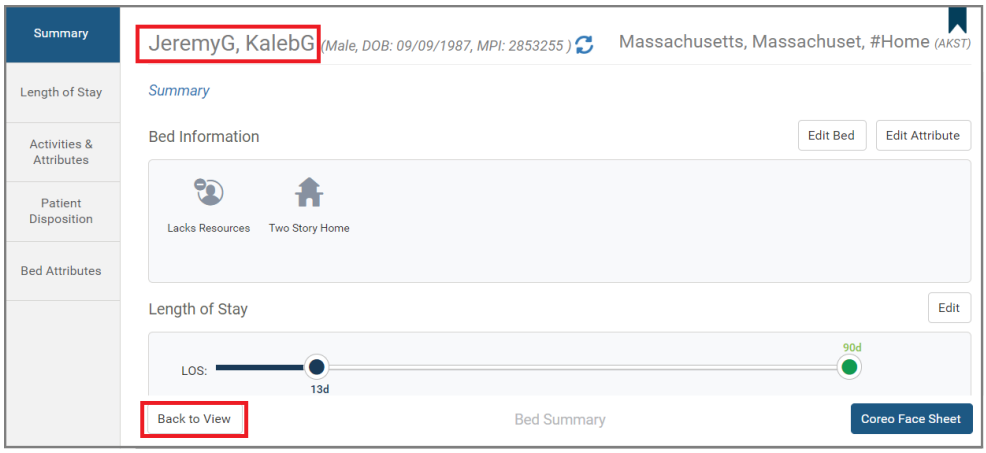


FIGURE 80. SUMMARY WINDOW

10. Select the **Back to View** button to close the window.
11. Select the **Bed View** button on the header bar to view the same patient details in the Bed View layout.

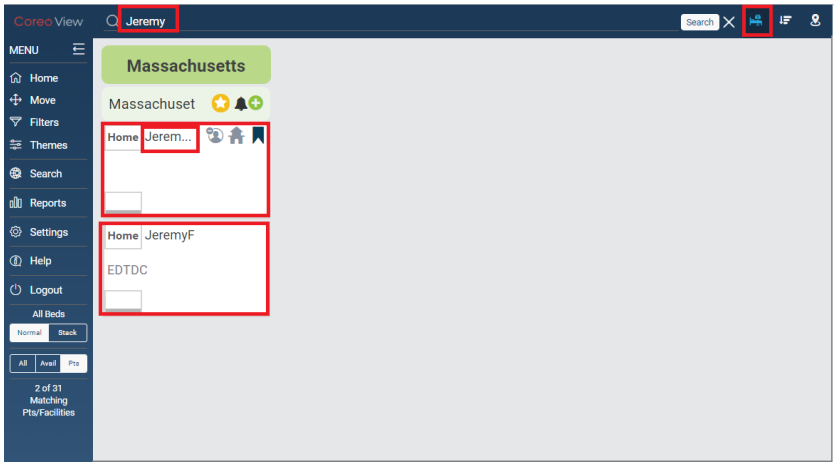


FIGURE 81. BED VIEW LAYOUT

5.5 Community Resources and Social Service Programs

Coreo View collaborates with Aunt Bertha to connect its users to community resources and social service programs in real-time. Connect to the social care resources and programs using these features in Coreo View:

- **Geomap Settings**
- **National & State Services**

5.6 Geomap Settings

Using **Geomap Settings** find nearby community resources, including food, medical supplies, transportation, housing-help organizations among many other resources in the vicinity of the patient's home. Care teams can locate community resources covering the geographic location surrounding a patient's home.

1. In the Geomap View, select the **Geomap Settings** button to open the **Geomap Settings** pane.
2. Select the check boxes under **Community** to find the required community resources in the nearby geographical vicinity.

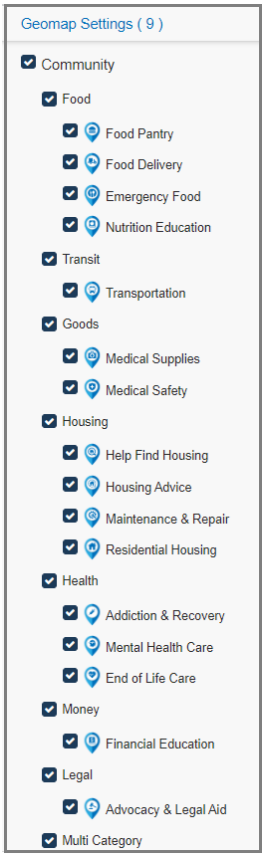


FIGURE 82. GROUP SETTINGS PANE–COMMUNITY RESOURCES

On selecting the relevant check boxes, the related markers display in the map.

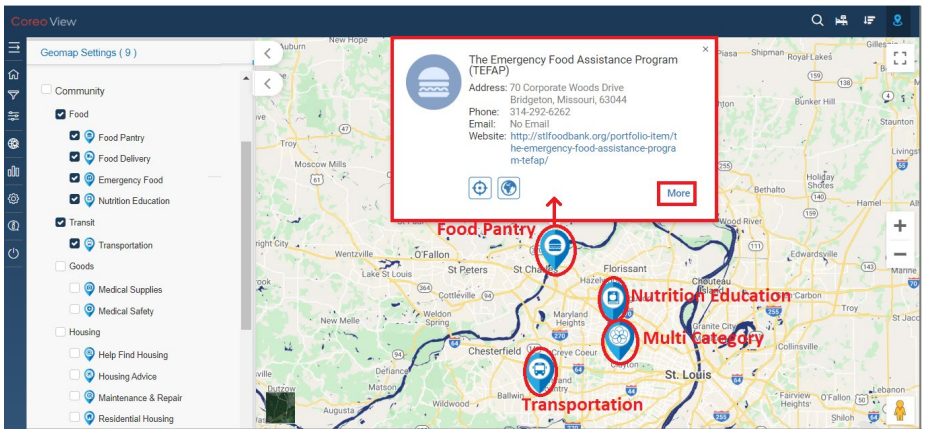


FIGURE 83. GEOMAP VIEW LAYOUT–COMMUNITY RESOURCES

You can either select an individual check box or select the **Community** check box to select all the check boxes together to view the respective markers.

3. Click the marker to open the information panel and to view details about the resource or service offered. Select **More** to know more about the program.

The **Multi Category** option indicates those providers who offer more than one type of service or program, like food, transportation, financial education, skills and training and so on.

5.7 National & State Services

Follow these steps to list the national and state service programs that are available in a geographical location:

1. In the Geomap View, select the **National & State Services** arrow to open the **National & State Services** pane on the left side of the screen.

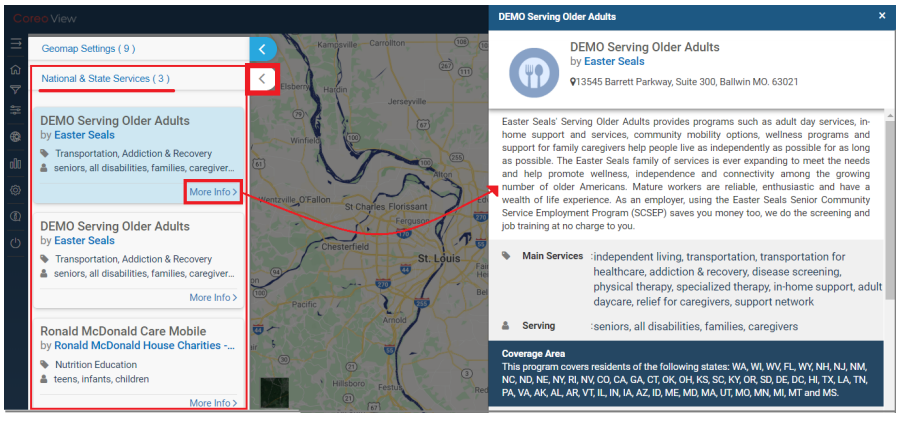


FIGURE 84. NATIONAL & STATE SERVICES

The national and state service programs that are available for the geographical location that is in focus in the geomap view on your screen are listed in the pane.

2. Select the **More Info** button to open the information box.

The information box gives you details about the kind of services that the program offers, the population type that they serve, their coverage area, and their timings of operation.

6 Using Filters and Themes

The Coreo View users can apply filter criteria to the patient list based on hospital groups, locations, patient cohorts, insurance providers, patient disposition status, patient attributes and activities, bed attributes, and risk factors. Only the related patient records display, and the other records are cleared from the view.

Coreo View provides you the flexibility to create and save new themes based upon the filter criteria such as hospital groups, locations, patient cohorts, insurance providers, patient information, among others. A theme customizes the look of the Coreo View screen and its layout based upon the filter criteria.

6.1 Filters

Apply filters to display the patient records based on the filter criteria. Only those patient records that meet the filter criteria are displayed. You can apply filters and themes across all the three views, the Bed View (BV), the Prioritized View (PV), and the Geomap View (GMV). The filter that you apply displays in all the three views.

6.1.1 Apply Filters

Follow these steps to apply one or more filter criteria to display only specific patient records across all the three views:

1. On the side menu, select **Filters** to open the **Filter** window.

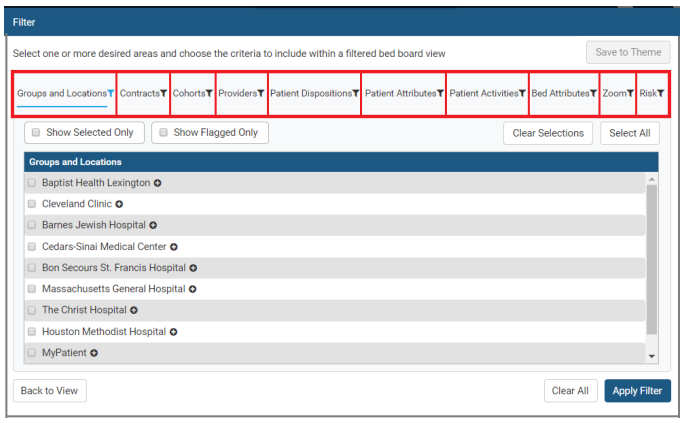


FIGURE 85. FILTER WINDOW

2. Select one or more of the following filter criteria which display as tabs across the **Filter** window to filter the patient record across all the three views:

- **Groups and Locations**: This is the default filter criterion. Select this to filter the patient list based on groups and their respective locations.
- **Contracts:** Select **Contracts** to filter the patient records based on the Coreo Contracts that the patients have.
- **Cohorts:** Select **Cohorts** to filter the patient records based on the Cohort group to which the patient belongs.
- **Providers:** Select **Providers** to filter the patient records based on the attributed providers with which the patients are associated.
- **Patient Dispositions**: The patient's dispositions are **Emergency**, **Admitted**, **Observation**, **Discharge Possible**, **Discharge Pending**, **Complete**. Select one or more of these disposition states to filter the patient records.
- **Patient Attributes**: Select this to filter the patient records based on the patient attributes such as **Chest Pain**, **NPO**, **Special Diet,** among others that you have assigned to the patients.
- **Patient Activities**: Select this to filter the patient records based on patient activities such as **Med Reminders**, **Ambulate**, **Insulin Drip**, among others that you have assigned to the patients.
- **Bed Attributes**: Select this to filter the patient records based on the bed attributes such as **Med Reminders**, **Ambulate**, **Insulin Drip**, among others that you have assigned to the patients.
- **Zoom**: Select **Zoom** to choose the zoom percentage, 60% being the least, and 240% the maximum by which you want to filter the patient records. 100% is the standard-default resolution.
- **Risk**: Select this to filter the patient records based on the risk group (**High Risk, Moderate Risk, Low Risk**) the patient is assigned to.

The options available under each filter criterion is based on your (user's) role and access permission granted to you by the Coreo View administrator.

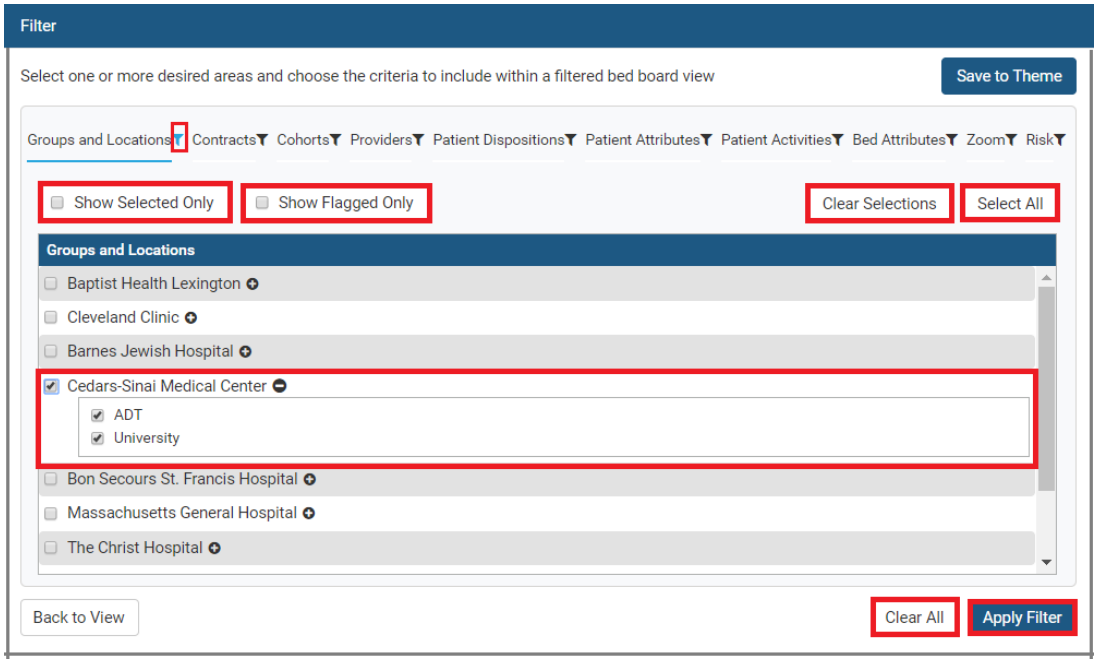


FIGURE 86. FILTER WINDOW–GROUPS AND LOCATIONS OPTIONS SELECTED

The user can view only those groups and locations for which they have access-permission.

3. Select the check box next to the group name based on which you want to filter the patient records.
4. Select the small plus icon next to the group name to view the locations for that group. On selecting the icon, it changes to minus sign when the location drop-down list displays.
5. Select the location names based on which you want to apply the filter.

The filter icon next to the filter criterion turns blue when you select one or more options.

6. Similarly, you can select one or more of the other filter criteria based on which you want to limit the patient list. Coreo View allows you to select all of the filter criteria together.
7. Select the **Show Selected Only** check box to view only those options that you have selected for that filter criterion. You can save this filter criterion as a theme.

8. Select the **Show Flagged Only** check box to have the flagged patient records as the filter criterion. The **Show Flagged Only** option displays only the flagged patients, both the Coreo flagged patients and the flagged patients assigned to beds. You can save this filter criterion as a theme.
9. Select the **Clear Selections** button to clear all the options that you have selected for the current filter criterion. Select the **Clear All** button to clear all the selections under all the filter criteria together.
10. Select the **Select All** button to select all the available options for a filter criterion.
11. Select the **Apply Filter** button to apply the filter for the patient records in the three views (BV, PV, and the GMV) directly without saving it as a theme.

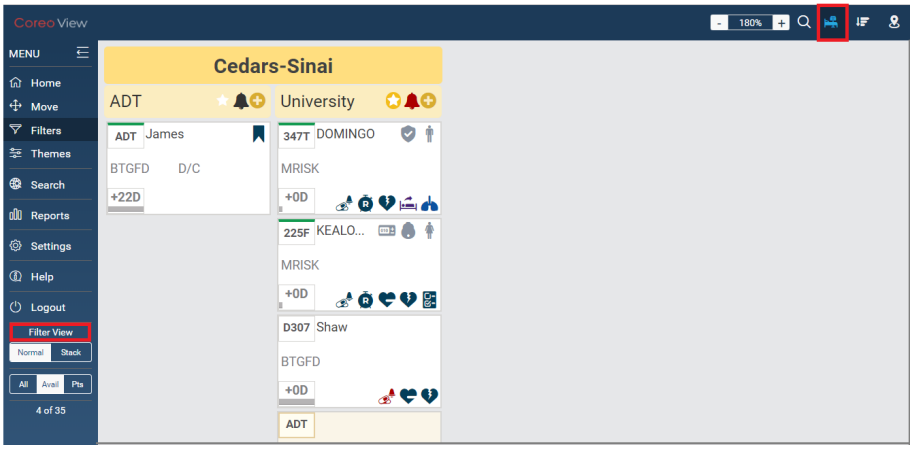


FIGURE 87. FILTER CRITERIA APPLIED IN THE BV

The applied filter displays a label, **Filter View**, on the side menu.

12. Click the PV button to view the PV layout.

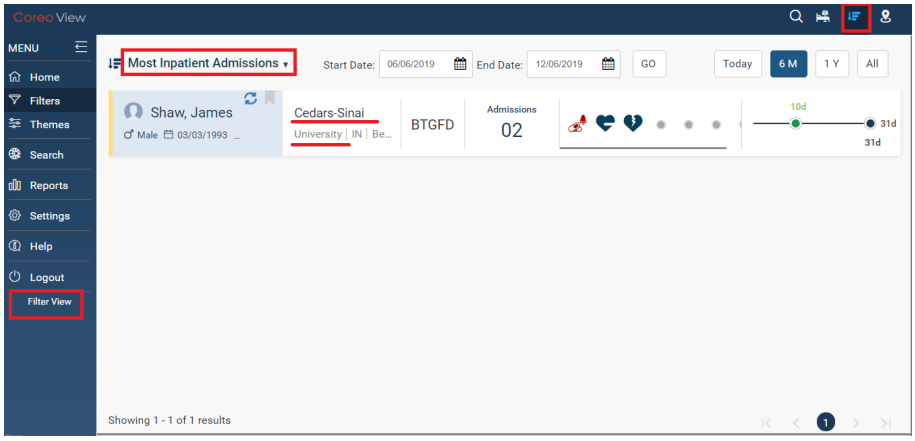


FIGURE 88. FILTER CRITERIA APPLIED IN THE PV

In the PV, you can view the theme applied to the default sorting attribute, **Most Inpatient Admissions**. Select the other sorting attributes to view the applied theme.

You can view the filtered patient records only if the theme results fall within the PV-filter criteria such as the date range (**Start Date** and **End Date**) and the periods (**6 M**, **1 Y**, **All**).

13. Select the GMV button on the header bar to go to the GMV.

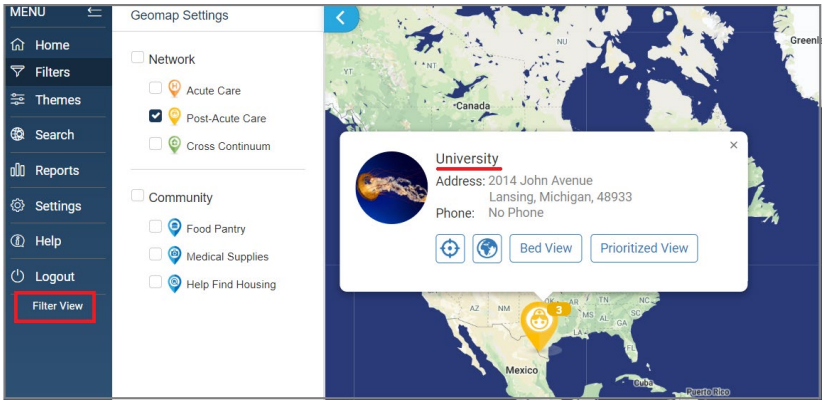


FIGURE 89. FILTER CRITERIA APPLIED IN THE GMV

You can view the applied filter in the geomap view.

6.2 Themes

A theme is a visual representation of locations, beds, and patients. Coreo View gives you the provision to save a theme, apply a theme, set a theme as a home default theme, and to edit a theme. The theme that you apply displays in all three views.

6.2.1 Save a Theme

Follow these steps to save a theme in the **Save Themes** window from the **Filter** window:

1. On the **Coreo View** home page, select **Filters** on the side menu to open the **Filter** window.

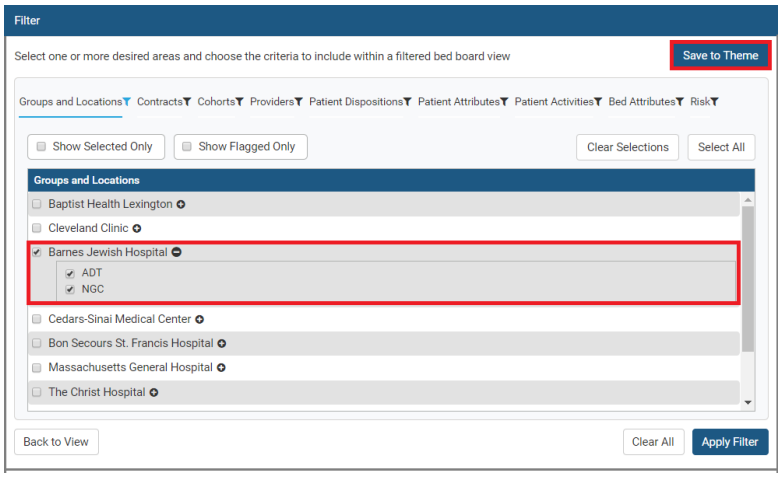


FIGURE 90. FILTER WINDOW – GROUPS AND LOCATIONS OPTIONS SELECTED

2. Select the **Groups and Locations** criterion or any criteria based on which you want to filter the patient records in the three views. The **Groups and Locations** criterion filters the patient list based on the groups and locations that you choose.
3. Select the check box next to the group name by which you want to filter the patient records.
4. Select the small plus icon next to the group name to view the locations for that group. On selecting the icon, it changes to minus sign when the location drop-down list displays.
5. Select the location names based on which you want to apply the filter on the patient records.
6. Similarly, you can select one or more of the other filter criteria based on which you want to limit the patient list. Coreo View allows you to select all the filter criteria at a time.
7. Select the **Save to Theme** button to save the filter criteria as a new theme. The **Save Themes** window opens.

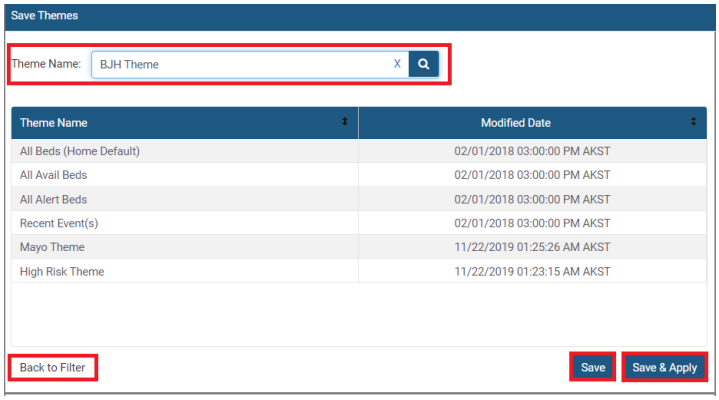


FIGURE 91. SAVE THEMES WINDOW

8. Enter the name for the saved filter criteria in the **Theme Name** box. Select **Save** to save the new theme without applying it and to use it for the next use.

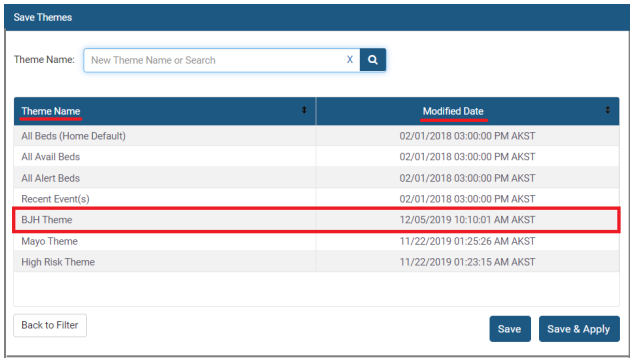


FIGURE 92. SAVE THEMES WINDOW

The saved theme displays under the **Theme Name** column along with the date and time at which you modified it. Or,

9. Select **Back to Filter** to go back to the **Filter** window without saving the theme or without applying the theme, or to quit the **Save Themes** window without making any changes. Or,
10. Select **Save & Apply** to save the theme and apply it in the BV and the other two views with immediate effect.

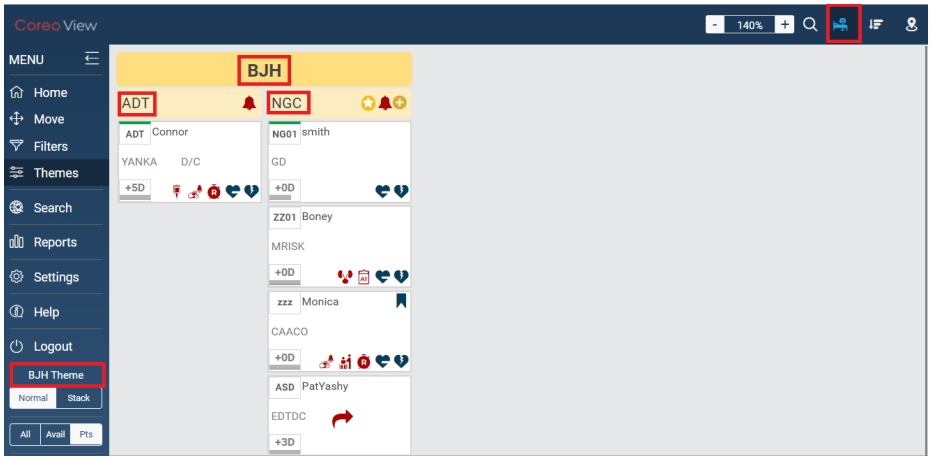


FIGURE 93. FILTER CRITERIA SAVED AND APPLIED AS A THEME IN THE BV

The applied theme name displays on the side menu.

11. Select the PV button on the header bar to go to the PV.

In the PV, you can view the theme applied to the default sorting attribute, **Most Inpatient Admissions**. Select the other sorting attributes to view the applied theme.

You can view the filtered patient records only if the theme results fall within the PV-filter criteria such as the date range (**Start Date** and **End Date**) and the duration (**6 M**, **1 Y**, **All**).

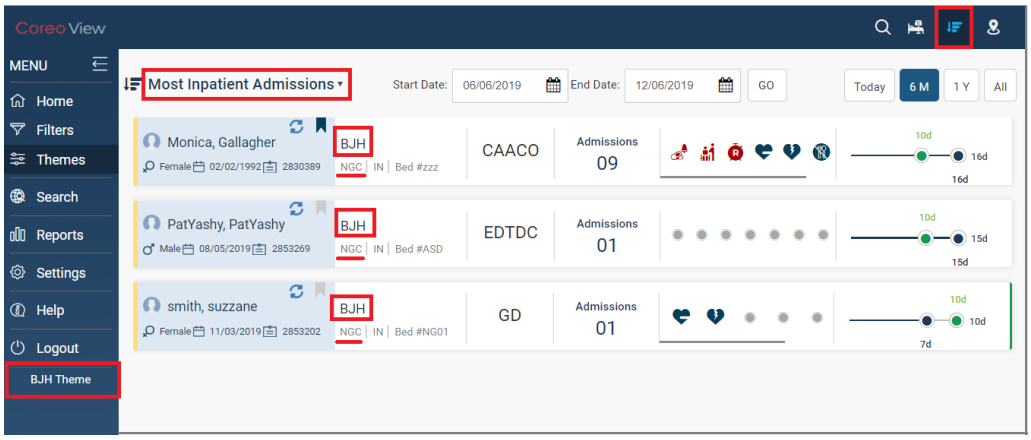


FIGURE 94. FILTER CRITERIA SAVED AND APPLIED AS A THEME IN THE PV

12. Select the GMV button on the header bar to go to the GMV.

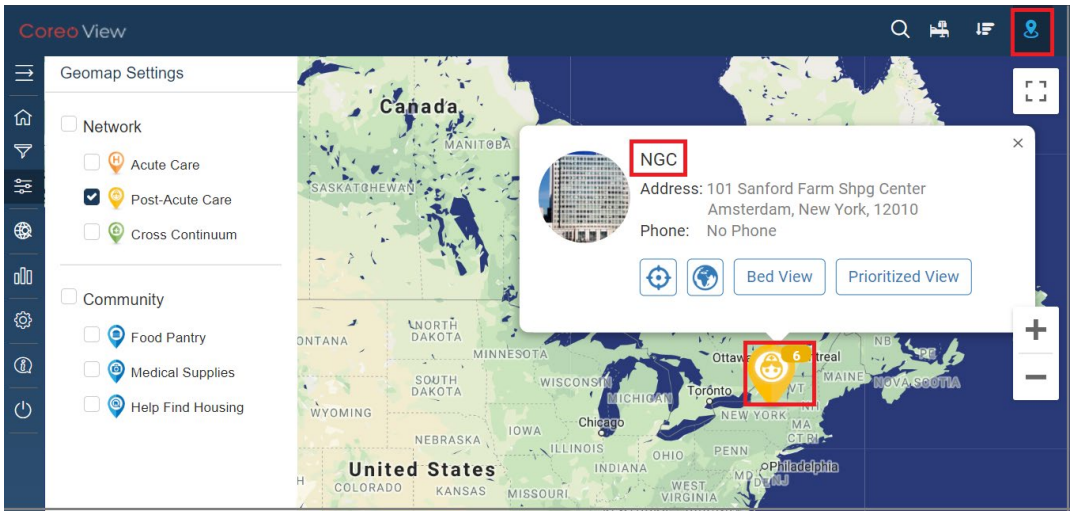


FIGURE 95. FILTER CRITERIA SAVED AND APPLIED AS A THEME IN THE GMV

You can view the applied theme on the GMV.

6.2.2 Apply a Theme

Follow these steps to apply a theme from the **View Themes** window to the three views, the BV, the PV, and the GMV:

1. On the **Coreo View** home page, select **Themes** on the side menu to open the **View Themes** window.

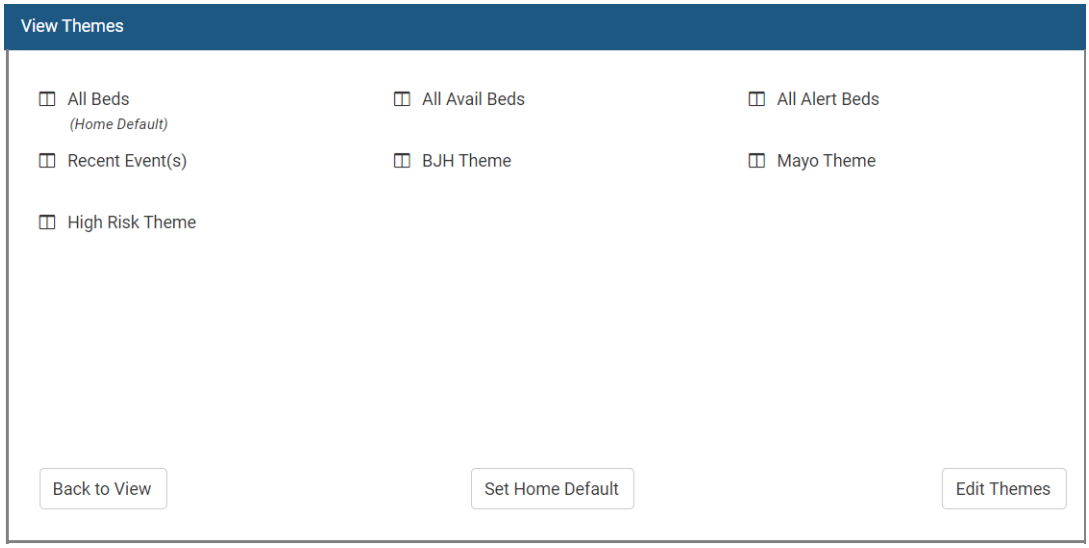


FIGURE 96. VIEW THEMES WINDOW

2. Select a theme, and the theme applies across all three views, the bed view, the prioritized view, and the geomap view.

6.2.3 Set a Theme as the Home Default Theme

A home default theme is a layout that the user sees on the Coreo View home page across all three views, the bed view, the prioritized view, and the geomap view each time the user logs into Coreo View.

1. Select the **Set Home Default** button in the **View Themes** window.
2. Select a theme that you want to set as the home default theme. The **(Home Default)** label displays below the selected theme.
3. Select **Back to View** to view the applied changes to the three view layouts.

6.2.4 Edit a Theme

The user can delete a theme that is not used anymore. **All Beds**, **All Avail Beds**, **All Alert Beds**, and **Recent Event(s)** themes are the system-defined themes, and you cannot edit them.

1. Select the **Edit Themes** button in the **View Themes** window. The **Edit Themes** window opens.

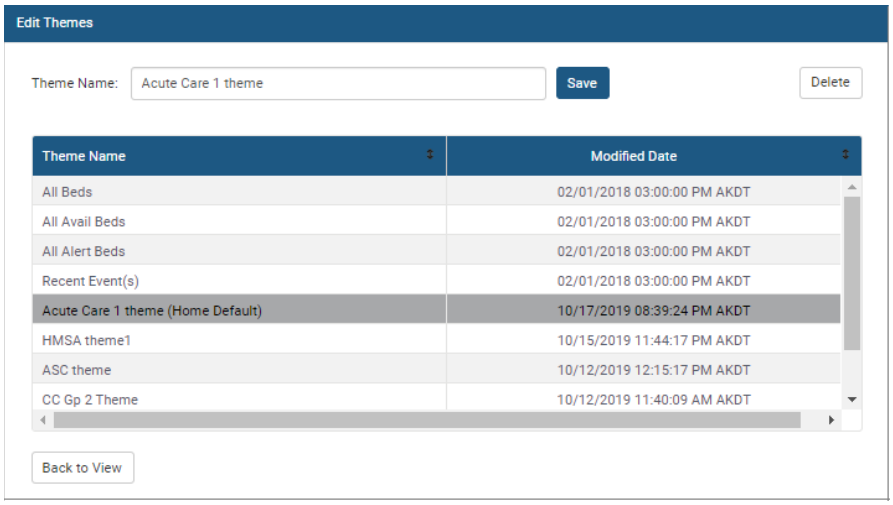


FIGURE 97. EDIT THEMES WINDOW

2. Enter the name of the theme that you want to delete in the **Theme Name** box, or select the theme directly in the grid.
3. Select **Delete** to delete the theme. A confirmation message box is displayed.

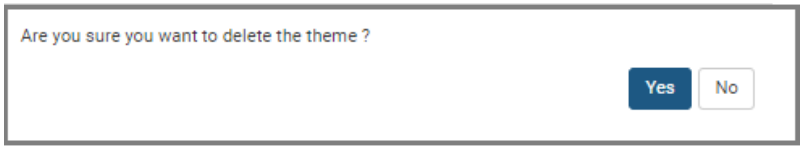


FIGURE 98. DELETE CONFIRMATION MESSAGE BOX

4. Select **Yes** to confirm the deletion of the theme.

If you delete a theme that you have created and set as the home default theme, the system-defined home default theme, **All Beds**, applies automatically.

5. Enter the theme name that you want to rename in the **Theme Name** box, or select from the grid.
6. Enter the new name in the **Theme Name** box and then select the **Save** button to rename the theme.
7. Click the **Back to View** button to exit the **Edit Themes** window.

7 Global Search and Local Search

Coreo View provides two types of search functionality to search the patient records to its users, the global search, and the local search.

- Global search: Coreo View searches for patient records from Coreo Analytics, which stores the master list of all the patients, and from within the Coreo View application.
- Local search: Coreo View searches for patient records only from within the application.

7.1 How to Perform a Global Search

In a global search, Coreo View fetches the patient records both from Coreo Analytics and Coreo View based on the search criteria that you enter.

The Coreo View patients are those patients from Coreo Analytics who are assigned a bed under one of the three groups (AC, PAC, and CC) in the Coreo View application.

Follow these steps to perform a global search of patients:

1. On the home page, on the side menu, select **Search** to perform a global search of patients. The **Coreo Population Search** window opens.

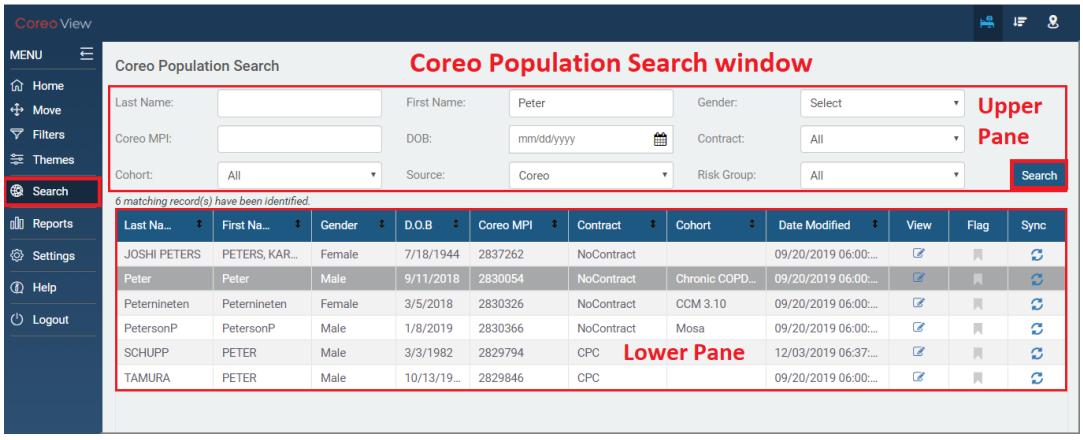


FIGURE 99. COREO POPULATION SEARCH WINDOW

2. Enter one or more criteria to search for a patient in the upper pane of the window. You can search the patient based on the following criteria:

- **Last Name:** The last name of the patient
- **First Name:** The first name of the patient
- **Gender:** Select the gender of the patient from these options:
  - **Male**
  - **Female**
  - **Unknown**
  - **Undifferentiated**
- **Coreo MPI:** The Master Patient Index (MPI) is a unique identification number generated for each patient in Coreo.
- **DOB:** Patient's date of birth
- **Contract: The insurance contract of the patient**
- **Cohort:** The cohort group to which the patient belongs. The cohorts are defined in the Coreo Analytics application.
- **Source:** The source from where the patient details are fetched. The Coreo (Coreo Analytics) application is the master source that stores the details of all the patients saved in the Coreo View application.
- **Risk Group:** Select the risk group that the patient is assigned to from these options:
  - **All**
  - **High Risk – HRISK**
  - **Moderate Risk – MRISK**
  - **Low Risk – LRISK**

3. Click the **Search** button to search the patient. Coreo View fetches the patient details both from Coreo Analytics and from within the Coreo View application.

Coreo View displays the patient details in the lower pane of the window based on the search criteria that you enter in the upper pane in the **Coreo Population Search** window.

7.2 How to Perform a Local Search

In a local search, Coreo View fetches the patient records only from within the Coreo View application based on the search criteria that you enter.

Follow these steps to perform a local search of a patient record from within the Coreo View application:

1. In the Bed View, select the **Search** icon on the header bar.
2. Enter the keyword to search for the details in the keyword search box on the header bar.

You can enter the group name, location name, patient-first name, patient-last name, MPI, Bed ID, Risk group, among others.

3. Select the **Search** button on the header bar to perform the local search.

The search criterion that you enter retains in all the three views, the Bed View, the Prioritized View, and the Geomap View.

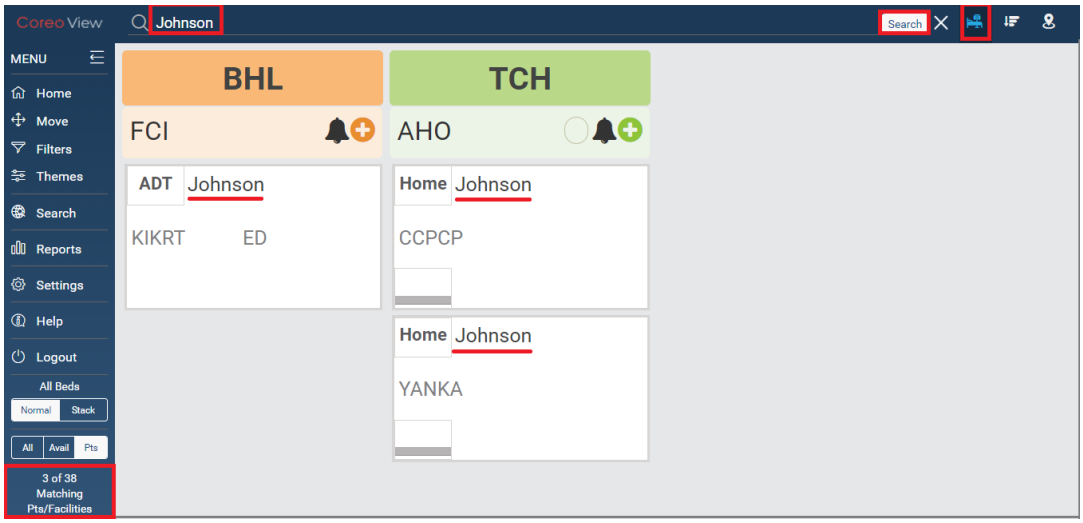


FIGURE 100. LOCAL SEARCH–BED VIEW

Coreo View searches for all the patient records from within the application and fetches the records based on the search criterion that you have entered.

The side menu displays the number of patients that match the search criteria out of the total patients that are in the bed view.

4. Select the **Prioritized View** button on the header bar to go to the Prioritized View layout.

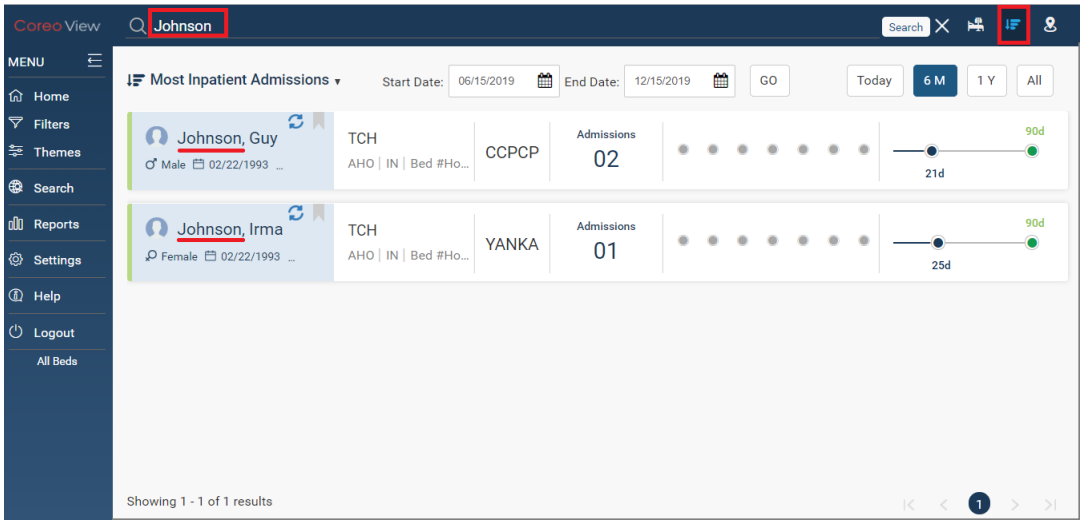


FIGURE 101. LOCAL SEARCH–PRIORITIZED VIEW

The patient records in the Prioritized View show based on the sorting attribute, start date, end date, and duration. The default sorting attribute being the **Most Inpatient Admissions**, the **Start Date** and the **End Date** being the current date, and **6M** the default duration for which the patient records display.

5. Select the Geomap View button on the header bar to view the search results in the Geomap View layout.

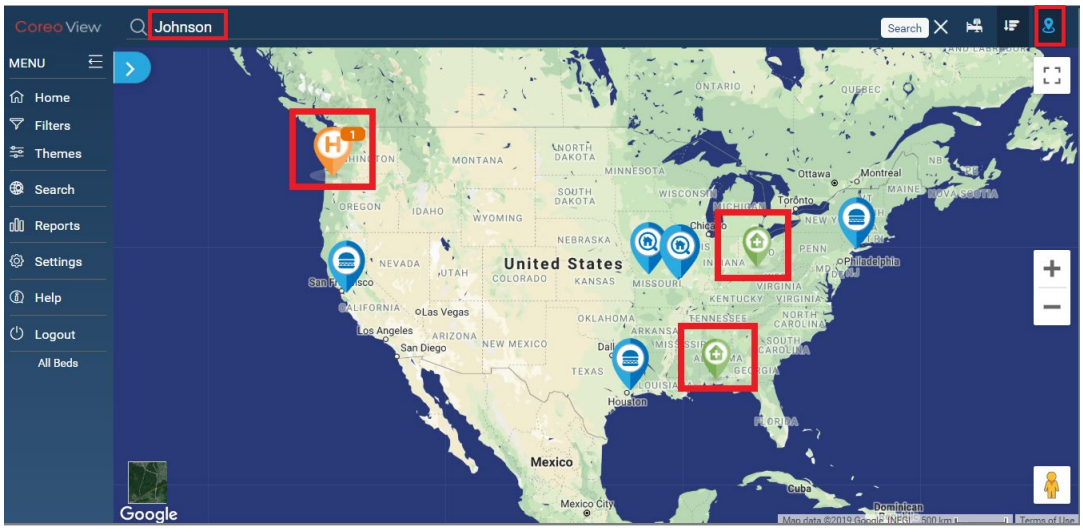


FIGURE 102. LOCAL SEARCH–GEOMAP VIEW

The group, location, or the patient marker displays based on the group-type the patient belongs.

8 Patient Summary

Coreo View users have the provision to display the patient information as three different summaries:

Bed Summary: Coreo View generates **Bed Summary** for those patients assigned to a bed (bed cell) under one of the three groups (AC, PAC, or CC) in Coreo View.

Note: Coreo View fetches all the patient records from Coreo Analytics; you cannot create any new patient in the Coreo View application. However, you can assign those patients that you fetch from Coreo Analytics to bed cells (under one of the three groups) created in Coreo View.

Coreo Summary: Coreo View generates **Coreo Summary** for those patients that you fetch from Coreo Analytics, and whom you have not assigned to any beds (bed cells) in Coreo View.

Flagged Summary: Coreo View generates **Flagged Summary** for those patients that you fetch from Coreo Analytics, and whom you have not assigned to any beds (bed cells) in Coreo View; you flag a patient record for monitoring purposes. Coreo View automatically assigns such flagged patients to a separate virtual location, which is color-coded green like the CC group.

8.1 Bed Summary

Follow these steps to view the bed summary of a patient:

1. On the home page, in the bed view, select a patient assigned to a bed cell for whom you want to view the bed summary and the patient information.

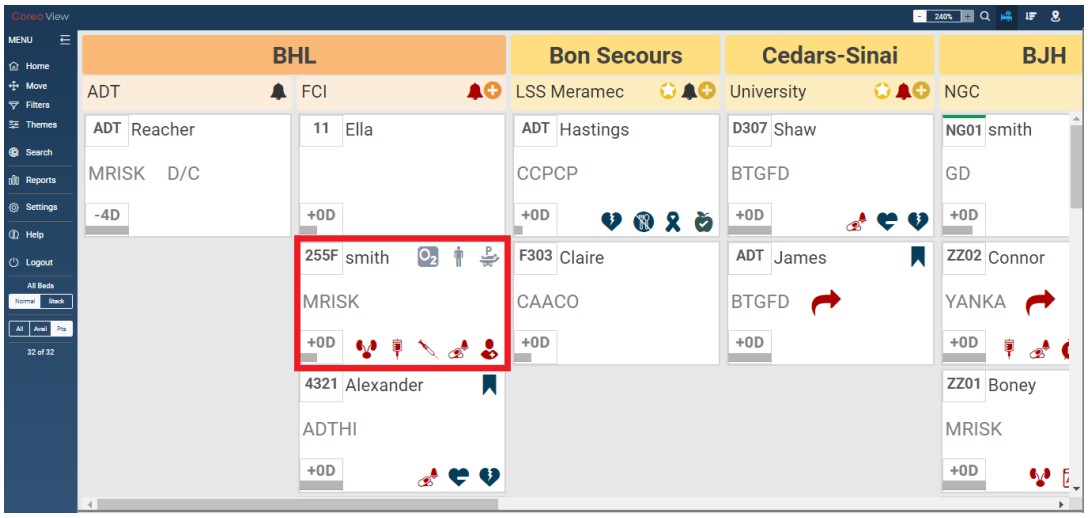


FIGURE 103. BED VIEW LAYOUT

8.1.1 Summary Window–Summary Tab

The **Summary** window opens on the **Summary** tab, which is the default tab page.

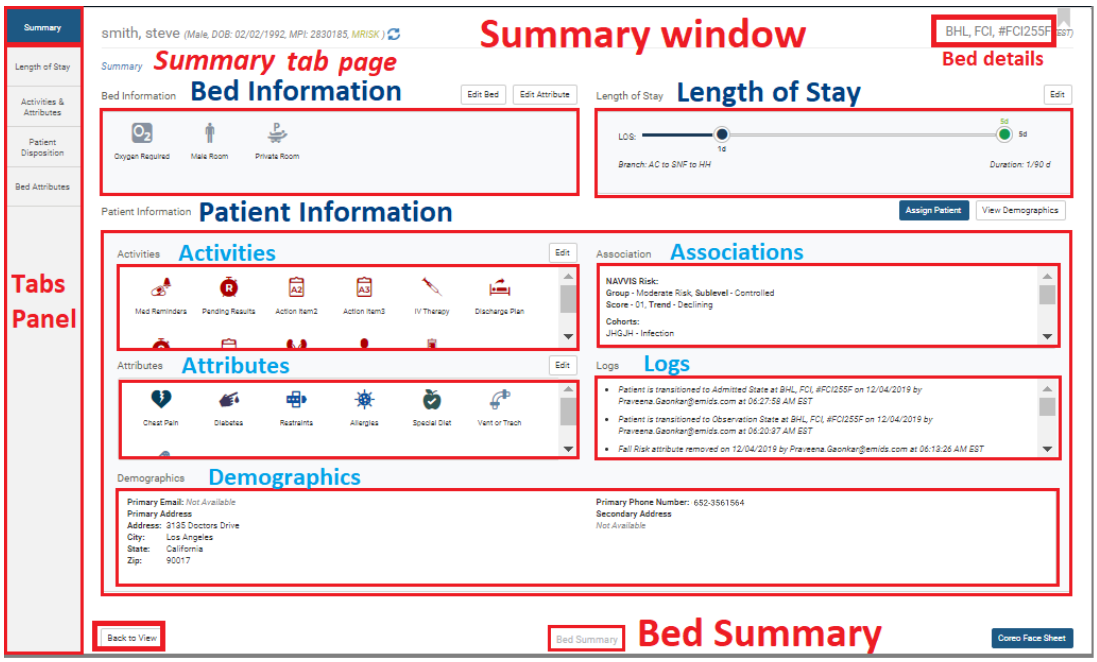


FIGURE 104. BED SUMMARY—SUMMARY WINDOW–SUMMARY TAB

When the patient is assigned to a bed cell under one of the three groups, the **Summary** window displays the **Bed Summary** of the patient.

The details on the **Summary** tab page in the **Summary** window are detailed in the following sections:

8.1.1.1 Summary Tab–Bed Information

The bed information is available only in the bed summary since the patient is assigned to a bed under one of the three groups in Coreo View. You can also view the bed summary for an empty bed cell. Bed information includes the following:

- Bed details – The bed details comprise the group name, the location at which the bed is available, and the Bed ID. The bed details display in the upper-right corner of the **Summary** window.
- Bed attributes: Coreo View allows you to assign these bed attributes, which are the amenities that a clinical facility is equipped with for each bed for patient care.

The bed attributes defined in Coreo View are listed in the following table:

Bed Attributes			
Bed Overflow	**Telemetry**	**Lacks Resources**	**Memory Bed**
At Home Alone	**Patient Sitter**	**Bariatric**	**Secure Unit**
Oxygen Required	**Two Story Home**	**Mobile Home**	**Male Room**
Female Room	**Remote Monitoring**	**Private Room**	

Table 14. Bed Attributes

The **Bed Information** box displays the bed attributes that you have assigned to a bed when assigning a patient to the bed or an empty bed cell.

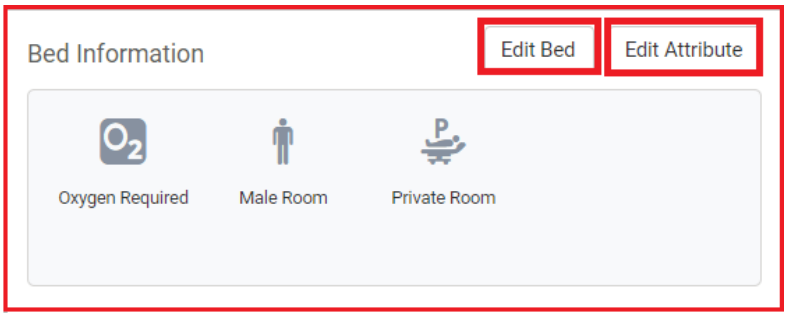


FIGURE 105. Bed Information box–Summary window

You can edit the bed number and the bed attributes in the **Bed Information** box.

1. Select the **Edit Bed** button. The **Edit Bed to Location** window opens. You can edit the bed number in this window.

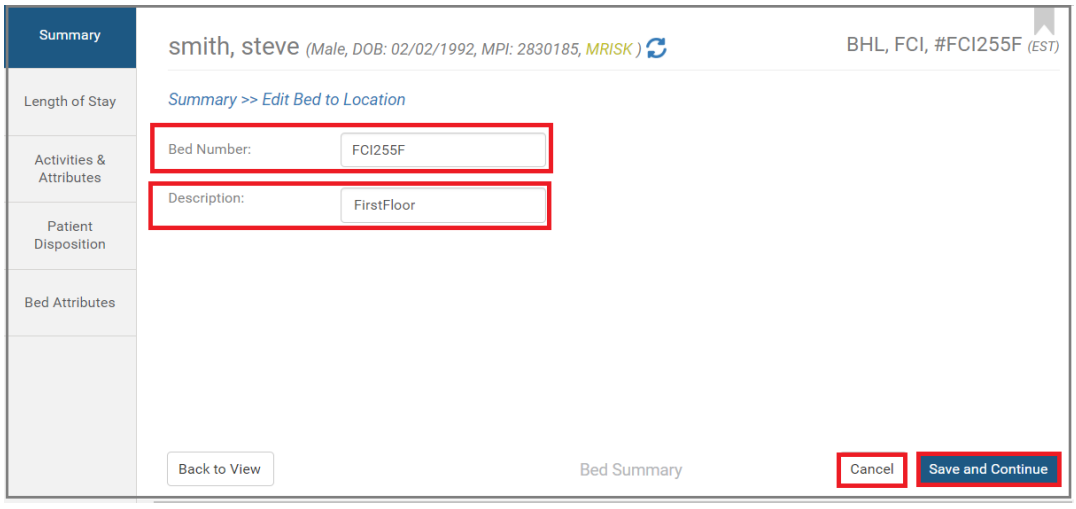


FIGURE 106. Edit Bed to Location window

2. Enter a new bed number in the **Bed Number** box, if you want to edit the bed number.
3. Enter the description in the **Description** box for the new bed number that you have entered.
4. Select the **Save and Continue** button to assign the patient to the newly created bed. The bed to which the patient was assigned previously is deleted on creating a new bed for that patient.
5. Select the **Back to View** button to go to the bed view.
6. Select the **Cancel** button to quit the window without making any changes to the Bed information and to go to the **Summary** window.
7. Select the **Edit Attribute** button in the **Bed Information** box to open the **Edit Bed Attributes** window.

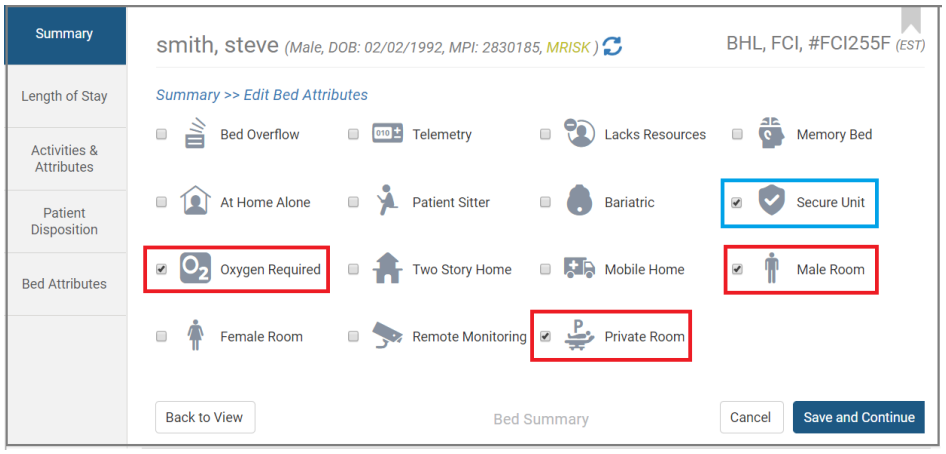


FIGURE 107. EDIT BED ATTRIBUTES WINDOW

8. You can select or clear one or more check boxes next to the bed attribute icons to either add or remove the bed attributes already assigned to the patient.
9. Select the **Save and Continue** button to save the changes that you have made to the bed attributes.

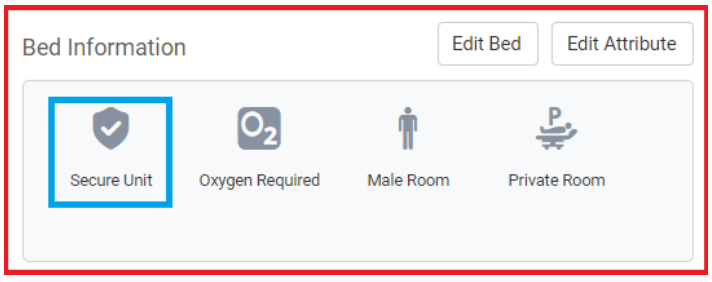


FIGURE 108. BED INFORMATION BOX–SUMMARY WINDOW

You can view the edited bed attributes in the **Bed Information** box in the **Summary** window.

8.1.1.2 Summary Tab—Length of Stay (LOS)

The **Length of Stay** box displays the patient's length of stay in a facility in days. However, for those patients in the **Emergency** state and **Observation** state, and those in the **ADT** bed in the **ADT** location, Coreo View does not calculate the LOS.

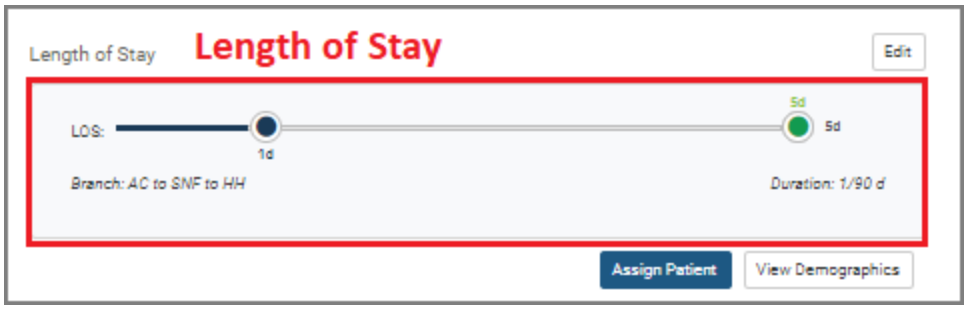


FIGURE 109. LENGTH OF STAY BOX

Refer to the following table for details about Length of Stay (LOS):

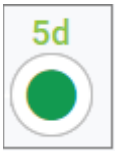
Icon and Element Name	Description
 LOS indicator bar–Current LOS (Days)	The blue circle and the blue LOS indicator bar represent the patient's current LOS in days in a facility based on the group-type (AC, PAC, or CC).
 LOS indicator bar–Anticipated LOS (Days)	The grey LOS indicator bar represents the patient's anticipated LOS in days in a facility based on the group-type.
 LOS indicator bar–Standard LOS (Days)	The green circle indicates the patient's standard LOS in days in a facility based on the group-type.
 The LOS branch	The LOS branch specifies the standard LOS for each level of care (AC, PAC, or CC) and the total duration to display the patient in the bed view (for example, 90 days for episode care). The default LOS branch is **AC to SNF to HH** and the branch is system-configurable.

Table 15. ELEMENTS IN THE LENGTH OF STAY BOX

Automated jobs that run in the Coreo View background remove the patients from the bed view on completion of 90 days.

You can either view the LOS assigned to the patient or can edit, using the **Edit** button, in the **Length of Stay** box. The **Length of Stay** tab page opens. Refer to the **Summary Window—Length of Stay Tab** topic for information on how to edit the LOS details.

8.1.1.3 Summary Tab—Patient Information–Activities

The **Activities** box displays the patient activities that you have assigned when assigning a patient to a bed.

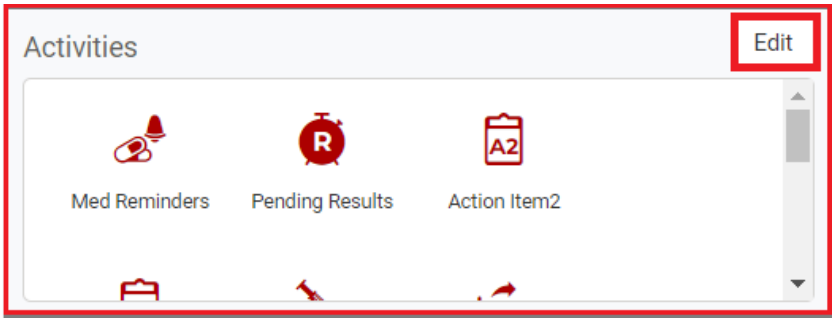


FIGURE 110. ACTIVITIES BOX–SUMMARY WINDOW

Follow these steps to either view the patient activities assigned to the patient or to edit them in **Activities** box.

1. Select the **Edit** button. The **Edit Patient Activities** window opens.

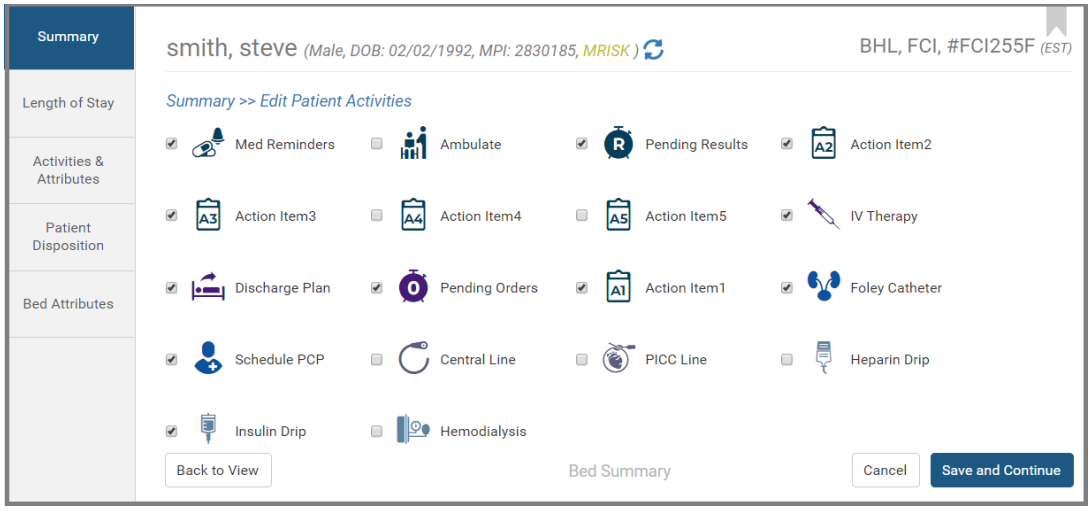


FIGURE 111. EDIT PATIENT ACTIVITIES WINDOW

You can select or clear one or more check boxes next to the patient activity icons to either add or remove the activities assigned to the patient.

The patient activities defined in Coreo View are listed in the following table:

Patient Activities			
Med Reminders	**Ambulate**	**Pending Results**	**Action Item2**
Action Item3	**Action Item4**	**Action Item5**	**IV Therapy**
Discharge Plan	**Pending Orders**	**Action Item1**	**Foley Catheter**
Schedule PCP	**Central Line**	**PICC Line**	**Heparin Drip**
Insulin Drip	**Hemodialysis**		

Table 16. PATIENT ACTIVITIES

2. Select the **Save and Continue** button to save any changes that you have made to the patient activities.
3. Select the **Cancel** button to quit the window without making any changes to the patient activities and to go to the **Summary** window.

If you have made any changes to the patient activities, it displays in the **Activities** box in the **Summary** window.

8.1.1.4 Summary Tab—Patient Information–Association

The **Association** box displays the following information assigned to a patient in Coreo Analytics.

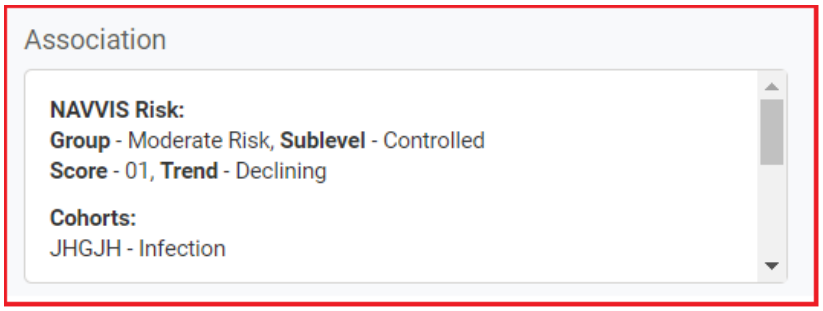


FIGURE 112. ASSOCIATION BOX–SUMMARY WINDOW

Group: The risk group the patient belongs to, the groups are **High Risk**, **Moderate Risk**, and **Low Risk**.

Sublevel

Score: The patient risk score

Trend: The trend that indicates the patient's health condition. The trend values include **Declining**, **Stable,** among others.

Cohorts: The cohort to which the patient belongs. The cohorts are defined in the Coreo Analytics application.

Attributed Providers: The provider or the provider group that the patient is associated with.

Contracts: The insurance contract of the patient.

Rosters: The user rosters who are in charge of the patient record in the Coreo View application.

You can only view the information in the **Associations** box but cannot edit it.

8.1.1.5 Summary Tab—Patient Information–Attributes

The **Attributes** box displays the patient attributes that you have assigned when assigning a patient to a bed.

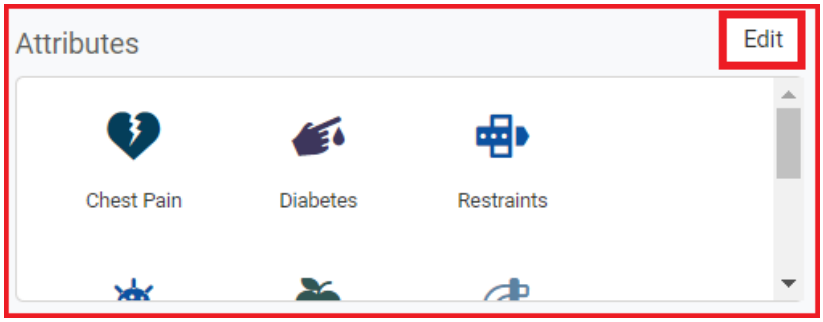


FIGURE 113. ATTRIBUTES BOX–SUMMARY WINDOW

Follow these steps to either view the patient attributes assigned to the patient or to edit them in the **Attributes** box.

1. Select the **Edit** button. The **Edit Patient Attributes** window opens.

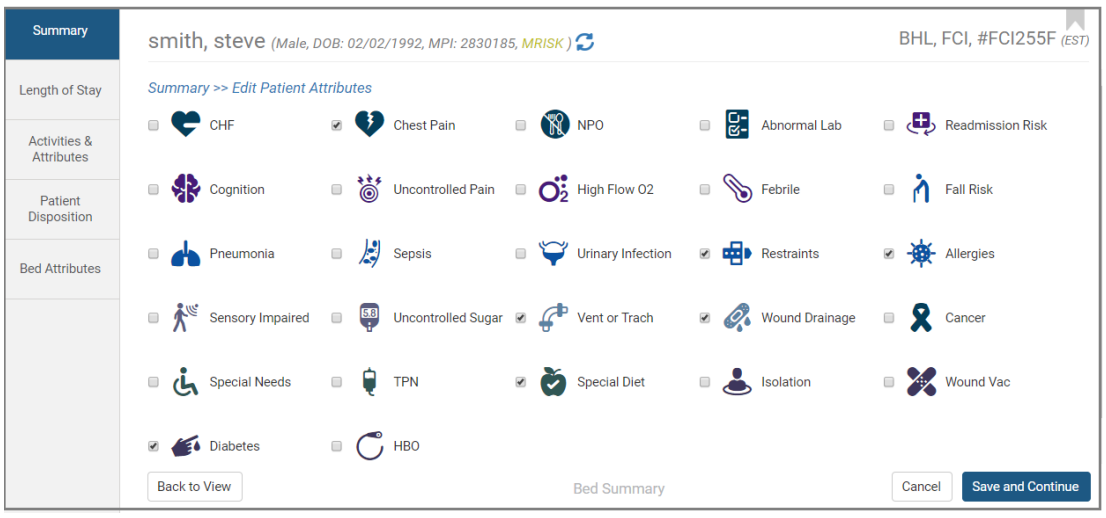


FIGURE 114. EDIT PATIENT ATTRIBUTES WINDOW

You can select or clear one or more check boxes next to the patient attribute icons to either add or remove the attributes assigned to the patient. The patient attributes defined in Coreo View are listed in the following table:

Patient Attributes				
CHF	Chest Pain	NPO	Abnormal Lab	Readmission Risk
Cognition	Uncontrolled Pain	High Flow O2	Febrile	Fall Risk
Pneumonia	Sepsis	Urinary Infection	Restraints	Allergies
Sensory Impaired	Uncontrolled Sugar	Vent or Trach	Wound Drainage	Cancer
Special Needs	TPN	Special Diet	Isolation	Wound Vac
Diabetes	HBO			

Table 17. PATIENT ATTRIBUTES

2. Select the **Save and Continue** button to save any changes that you have made to the patient attributes.
3. Select the **Cancel** button to quit the window without making any changes to the patient attributes and to go to the **Summary** window.

If you have made any changes to the patient attributes, it displays in the **Attributes** box in the **Summary** window.

8.1.1.6 Summary Tab—Patient Information–Logs

You can view and track the activities, bed assignments, movements, updates, and attributes assigned to the patient in the **Logs** section. It displays the user role who has made these changes to the patient record.

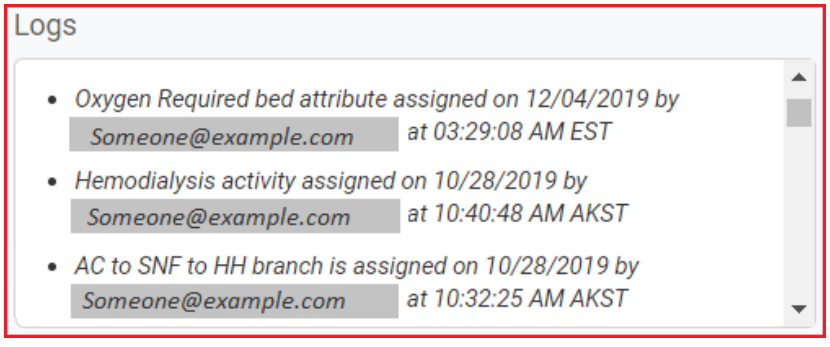


FIGURE 115. LOGS BOX–SUMMARY WINDOW

Logs is a view-only section, and you cannot make any edits in this box.

8.1.1.7 Summary Tab—Patient Information–Demographics

View the address and contact details of the patients in the **Demographics** box.

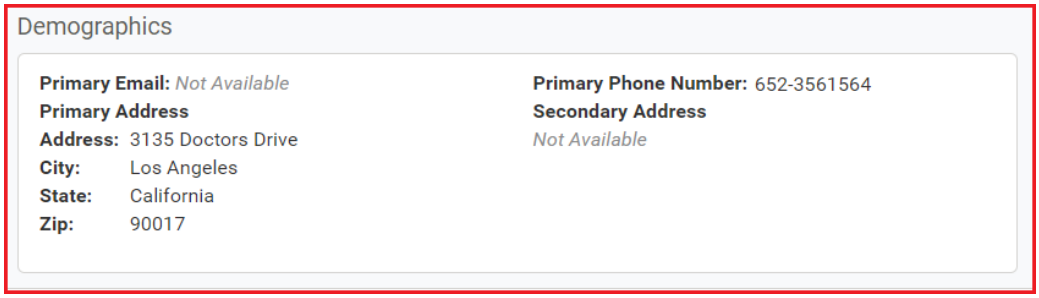


FIGURE 116. DEMOGRAPHICS BOX–SUMMARY WINDOW

Demographics box is a view-only section, and you cannot make any edits in this box.

8.1.2 Summary Window–Length of Stay Tab

The **Length of Stay** tab page displays the patient's length of stay in a facility in days.

Follow these steps to either view the patient's LOS details or to edit them.

1. On the **Tabs** panel in the **Summary** window, select the **Length of Stay** tab to open the **Length of Stay** tab page.

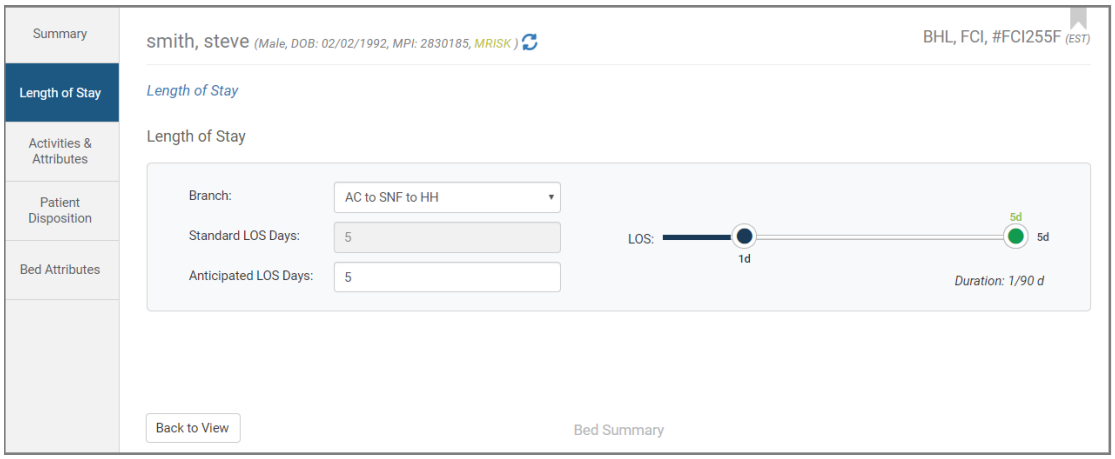


FIGURE 117. BED SUMMARY—SUMMARY WINDOW– LENGTH OF STAY TAB PAGE

You can view the details of the patient's length of stay in a facility in days.

1. Select the **Branch** drop-down arrow from the following options to select another branch, if required. The default branch is **AC to SNF to HH**, which is system-configurable.

2. In the **Anticipated LOS Days** box, when you enter a value higher than the standard number of days, a "+" icon displays to trigger outreach to the doctor. However, this feature does not apply to the **Low Risk Patient** branch.

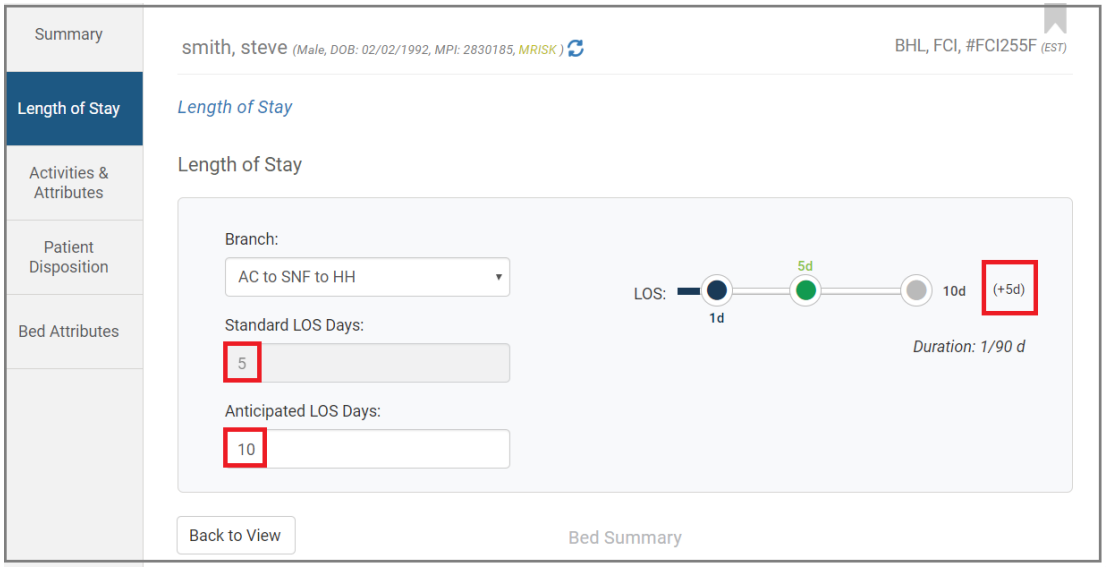


FIGURE 118. LENGTH OF STAY TAB PAGE–ANTICIPATED LOS DAYS > STANDARD LOS DAYS

Similarly, when the anticipated number of days is lesser than the standard number of days, a "-" icon displays.

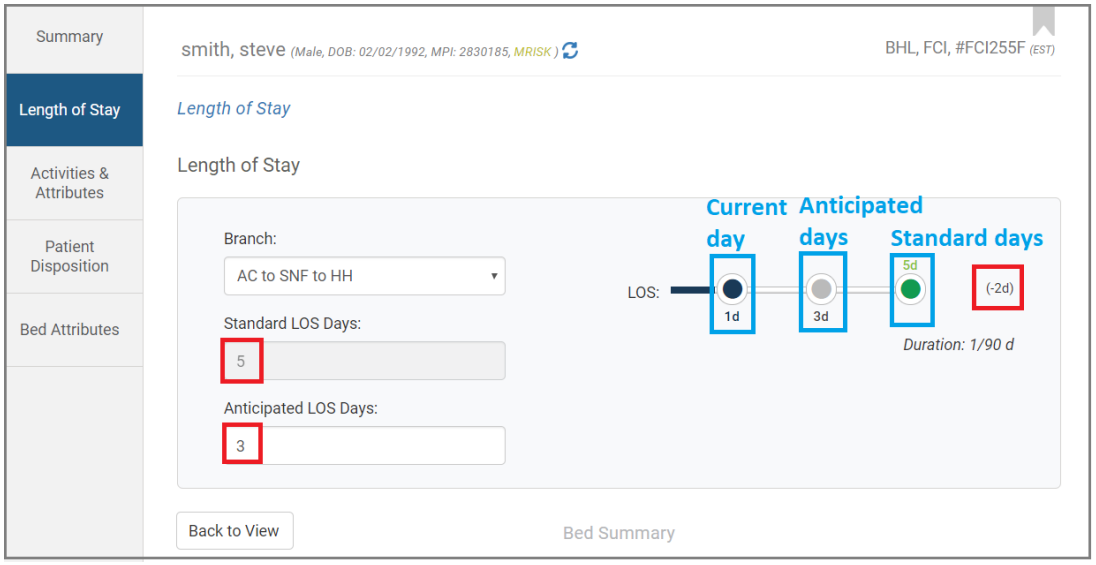


FIGURE 119. LENGTH OF STAY TAB PAGE–ANTICIPATED LOS DAYS < STANDARD LOS DAYS

The days within the brackets represents the difference between the **Anticipated LOS Days** and the **Standard LOS Days**.

Coreo View calculates the LOS differently in each of these scenarios as detailed in the following sections:

8.1.2.1 LOS for Patients in Emergency (ED) State and Observation (OBS) State

When you assign a patient to a bed in the OBS or ED state, Coreo View does not calculate LOS for such patients, and the LOS fields are unavailable.

8.1.2.2 LOS for Patients in Admission State

In Coreo View, patients are in the **Admission** state when you admit the patient to a bed manually (through **Summary window – Assign patient page**), or through the ADT event–A01 - HL7 files.

When you assign a patient P1 to a bed in Admit status, Coreo View assigns the default branch, AC to SNF to HH branch, which is a system configurable branch and you can view the following default values in the **Length of Stay** box:

- **Standard LOS Days - 5**
- **Anticipated LOS Days - 5**
- **Current day - 1**
- **Duration - 1/90d**

However, the Anticipated LOS days must be equal to or greater than the current day.

If the number of days that you enter in the **Anticipated LOS Days** is lesser than the Current number of days, Coreo View automatically increments the Anticipated LOS Days by 1.

Coreo View automatically increments the Current number of days and Duration by 1 every 24 hours from the admission date and time.

When you move a patient from one location to another within the same AC group:

- There are no changes in the LOS.

When you move a patient across different AC groups:

- Coreo View resets the current day to 1.
- The duration continues.

For example, for a patient P1 in AC Group 1, the current day is 5, and the duration is 5/90d.

When you move P1 to AC Group 2, the current day resets to 1, and the duration remains 90d.

8.1.2.3 LOS after Discharging the Patient

Case 1:

The Current day resets to 1, and the existing Duration continues as is in these scenarios:

1. When you move a patient from a group under **Acute Care** to another group under **PAC** or vice versa
2. When a patient gets discharged through Request move or Quick move

Case 2:

Coreo View stores the number of days that the patient stays at the ADT location in **Discharge (D/C)** state. And, when you move the patient to another group, the number of days the patient spent at the ADT location in the D/C state displays on **the Length of Stay** tab page.

For example, before you moved a patient to the ADT in the D/C state, if these were the following values for LOS: Current day – 5 and Duration - 5/90d

And, that the patient is at the ADT location in D/C state for 2 days.

Now, when you move the patient to another Acute care group or PAC group, the same LOS branch continues, and Coreo View resets the following values:

Current day - 2 and Duration – 5/90d

The Current day displays as 2 since the patient was at the ADT location in D/C state for 2 days.

8.1.2.4 LOS after Discharging the Patient

For a patient assigned to the Cross Continuum group, the **Standard LOS Days** and the **Anticipated LOS Days** box are not available.

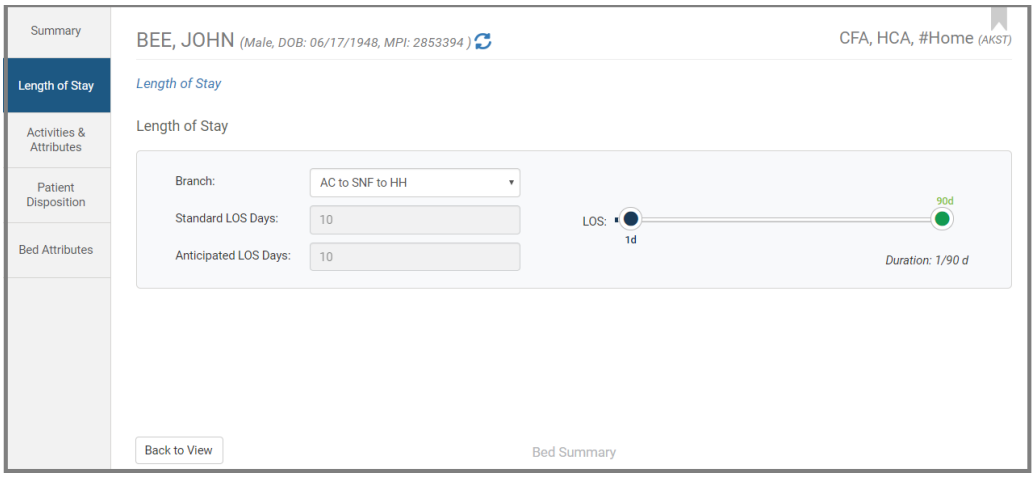


FIGURE 120. LENGTH OF STAY TAB–PATIENT IN A CROSS CONTINUUM GROUP

The blue circle represents the Current day (example, 1d).

The green circle represents the Total duration for the assigned LOS branch (example, 90d).

Duration represents Current day/Total duration (example, 1/90d).

When a patient is at an ADT location in the D/C state for more than 24 hours (configurable time), Coreo View auto-moves the patient to a configurable location in Cross continuum through the automation process.

The LOS branch of the patients change based on the following risk group during the automation process:

- For High Risk Patients – The LOS branch does not change
- For Medium/Low Risk Patients – Coreo View assigns the **Low Risk Patient** branch (The branch names are system-configurable)
- For Patient with no risk - Coreo View assigns the **Low Risk Patient** branch

8.1.2.5 LOS Closure

When the total LOS duration for a patient is complete, Coreo View removes the patients from the Bed View during the automation process.

8.1.3 Summary Window–Activities & Attributes Tab

The **Activities & Attributes** tab page displays the patient attributes and activities that you have allocated to the patient at the time of assigning a patient to a bed.

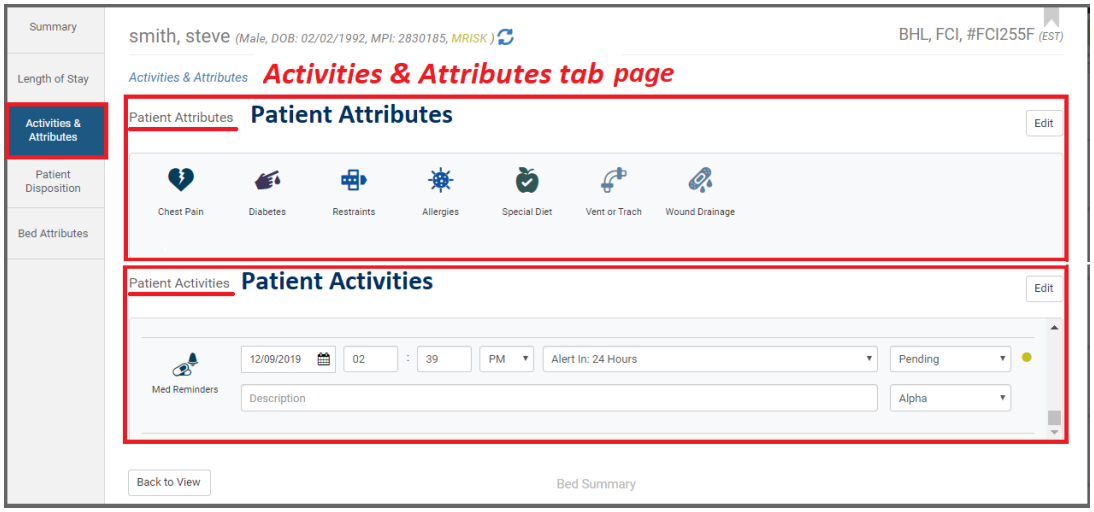


FIGURE 121. BED SUMMARY—SUMMARY WINDOW–ACTIVITIES & ATTRIBUTES TAB

Follow these steps to either view the patient attributes and activities assigned to the patient or to edit them.

1. On the **Tabs** panel in the **Summary** window, select the **Activities & Attributes** tab to open the **Activities & Attributes** tab page.
2. Select the **Edit** button above the **Patient Attributes** box if you want to change the attributes assigned to the patient.
3. Select the **Edit** button above the **Patient Activities** box if you want to change the activities assigned to the patient.

For each of the activities that you assign to the patient, Coreo View allows you to set an alert time frame, and when the activity is overdue, the related activity icon changes to red color alerting the user (you) about the delay. The red color icon also displays in the relevant bed cell in the bed view layout.

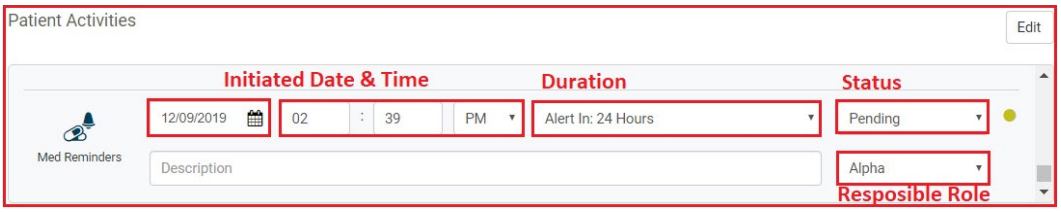


FIGURE 122. PATIENT ACTIVITIES BOX–ALERT TIMER

4. In the Date box, select the date by which the assigned role must perform the patient activity.
5. Enter the time in hours and minutes to initiate the activity.
6. Select the alert timer duration from the drop-down list:
   - **Alert In: 2 Hours**
   - **Alert In: 2 Hours**
   - **Alert In: 4 Hours**
   - **Alert In: 8 Hours**
   - **Alert In: 24 Hours**
   - **Alert In: 2 Days**
   - **Alert In: 3 Days**
   - **Alert In: 1 Week**
   - **Alert In: 2 Weeks**
   - **Alert In: 4 Weeks**
   - **No Alert**

Once the time exceeds the set duration with respect to the initiated time, the activity icon changes to red color.

7. Change the status of the activity by selecting from the list:
   - **Pending**
   - **Closed**
   - **Deferred**
   - **Incomplete**
8. Select the user role responsible for updating the activity in the application. The user roles created by the Coreo View administrator display as a list on selecting this box.
9. Enter a description, if required.

Similarly, you can set the alert timer for each activity that you have assigned to the patient.

8.1.4 Summary Window–Patient Disposition Tab

The **Patient Disposition** tab displays the state of the patient that you have assigned at the time of assigning a patient to a bed.

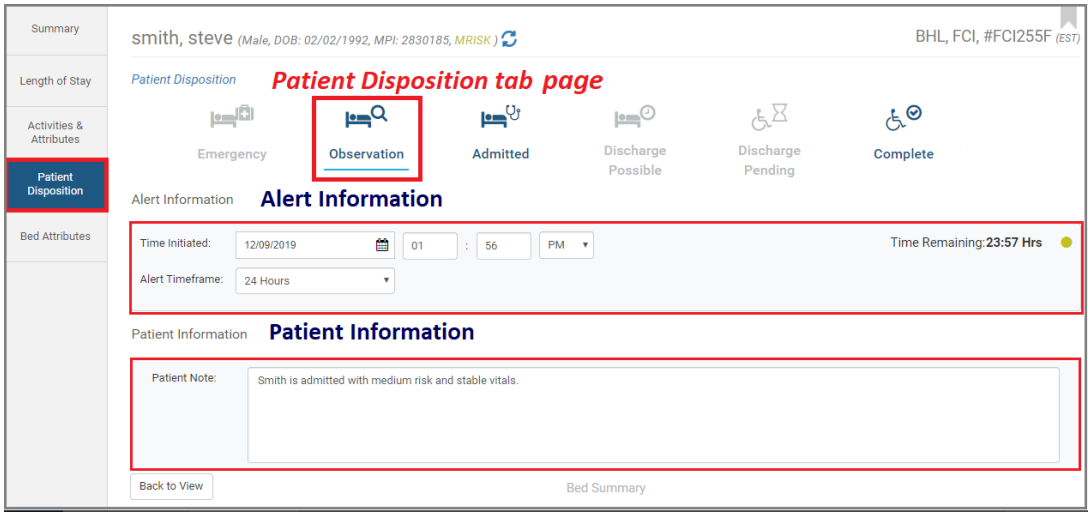


FIGURE 123. BED SUMMARY—SUMMARY WINDOW–PATIENT DISPOSITION TAB

Follow these steps to view or change the patient disposition state and set the alert timer for the disposition states:

1. On the **Tabs** panel in the **Summary** window, select the **Patient Disposition** tab to open the **Patient Disposition** tab page.

The state that the patient is assigned at the time of admission highlights with a blue bar below the icon. However, you can change the disposition state for the patient.

The following table details about each disposition state:

Patient Disposition State	Description
 Emergency	You can admit a patient in the **Emergency** state only in facilities/groups which belong to the Acute Care group-type. When a patient is admitted to the **Emergency** state, you can change the state to any of the other disposition states on the **Patient Disposition** tab in the **Summary** window. You can set an alert timer for this state. When the set timeframe exceeds, the overdue number of hours displays in red in the respective bed cell and the **Alert Information** box in the **Summary** window.
 Observation	You can admit a patient in the **Observation** state in facilities/groups belonging to all the three levels, Acute Care, Post-Acute Care, and Cross Continuum. From the **Observation** state, you can change the patient state to either an **Admission** state or **Complete** state. The other disposition state icons are inactive when the **Observation** state icon is selected. You can set an alert timer for this state. When the set timeframe exceeds, the overdue number of hours displays in red in the respective bed cell and the **Alert Information** box in the **Summary** window.
 Admitted	You can admit a patient in the **Admitted** state in facilities/groups belonging to all the three levels, Acute Care, Post-Acute Care, and Cross Continuum. The **Emergency** disposition state icon is inactive when the **Admitted** state icon is selected. You can view or modify the time at which the user initiates the admission process for the patient; however, the alert timer option is not available for this disposition state.

 Discharge Possible	Select the **Discharge Possible** state when there is a possible discharge for the patient that is initiated by the authorized medical team. The **Discharge Possible** state is available only in the **Summary** window on the **Patient Disposition** tab. The **Emergency** disposition state icon is inactive when you select the **Discharge Possible** state icon. You can set an alert timer for this state. When the set timeframe exceeds, the overdue number of hours displays in red in the respective bed cell and the **Alert Information** box in the **Summary** window.
 Discharge Pending	The Coreo View functionality for the **Discharge Pending** state and the **Discharge Possible** state are similar.
 Complete	Select the **Complete** state to complete the discharge process for the patient. A message box displays informing you that the patient would be moved to the **ADT** bed in the **ADT** location. Coreo View moves the discharged patients to a pre-defined location called **ADT**. When the administrator creates a new group, for the each created group, Coreo View creates an automatic **ADT** location, and when a patient discharge process happens, the patient moves to the ADT bed in the ADT location, which you can view in the bed view layout. The disposition state-icons are inactive for a discharged patient in the ADT bed in the ADT location. You can enter the time at which you initiated the discharge completion process for the patient; however, the alert timer option is not available for this disposition state.

Table 18. PATIENT DISPOSITION STATES–SUMMARY WINDOW

Refer to the **Bed Cell Highlighting and Patient Disposition Status** table for information on how the patient disposition states display in the bed cells.

2. In the **Alert Information** section, the date and the time at which you initiated the disposition state display in the **Time Initiated** box. The current date and time are the default values that you can change.
3. In the **Alert Timeframe** box, select the number of hours from the drop-down list for which you want to set an alert timer duration. Once the time exceeds the set duration with respect to the initiated time, the overdue number of hours change to red color.
4. In the **Patient Note** box, enter a note about the patient, if required.

8.1.5 Summary Window–Bed Attributes Tab

The **Bed Attributes** tab page displays the bed attributes that you have assigned to a bed when assigning a patient to the bed or an empty bed cell.

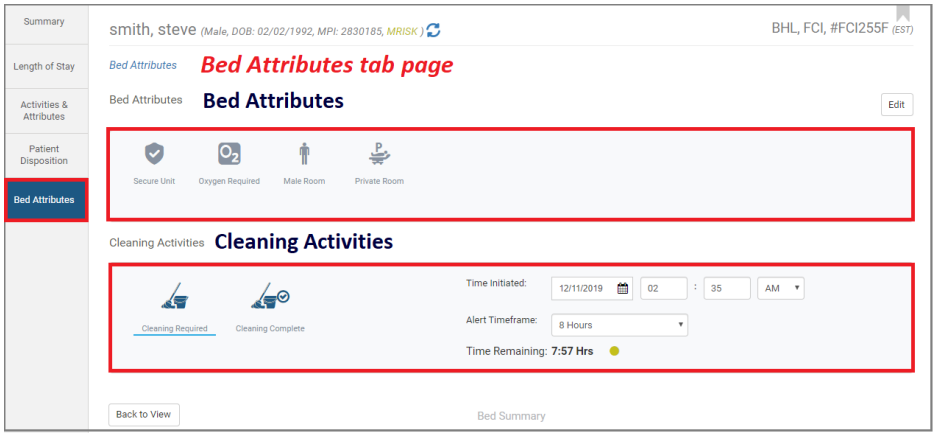


FIGURE 124. BED SUMMARY—SUMMARY WINDOW–BED ATTRIBUTES TAB

Refer to the **Summary Tab—Bed Information** topic for more information on how to edit the bed attributes.

1. In the **Cleaning Activities** box, select the **Cleaning Required** icon if the bed requires cleaning.

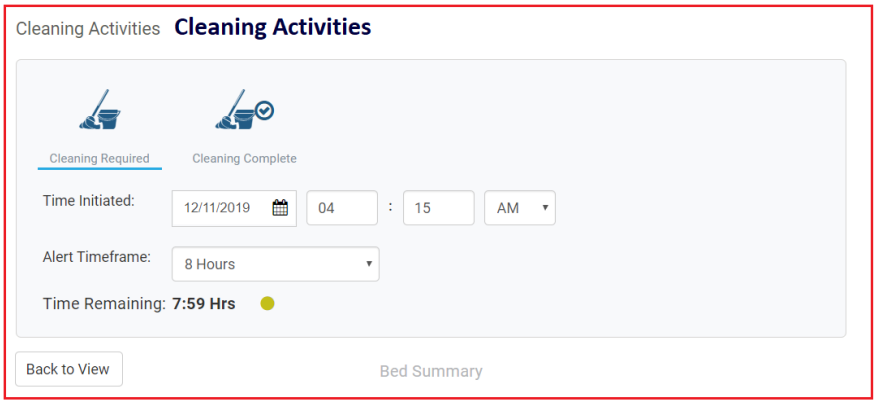


FIGURE 125. BED ATTRIBUTES TAB–CLEANING ACTIVITIES BOX

You can set an alert timer for the cleaning activity.

2. In the **Time Initiated** box, the date and time at which you initiate the cleaning activity displays. The current date and time are the default values that you can change.
3. In the **Alert Timeframe** box, select the number of hours(duration) for which you want to set an alert timer duration from the drop-down list. Once the time exceeds the set duration with respect to the initiated time, the overdue number of hours change to red color in the **Cleaning Activities** box.

If you assign the cleaning activity to an empty bed cell, the **Cleaning Activity** icon displays in the bed cell.

FIGURE 126. BED CELL–CLEANING ACTIVITY ICON

Refer to the following table for details on the cleaning activity icon colors and what they stand for:

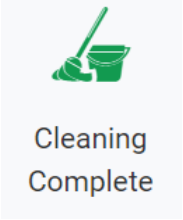
Cleaning Activity Icon	Description
	The icon in the bed cell is olive-green color when the set time duration is within the alert time frame with respect to the initiated time.
	The icon in the bed cell is a bright green color when you select the **Cleaning Complete** icon in the **Cleaning Activities** box, indicating that the cleaning activity is complete.
	The icon in the bed cell is red color when the set time duration exceeds the alert time frame with respect to the initiated time.

Table 19. CLEANING ACTIVITY ICON COLORS

8.1.6 Deleted Patients

Duplication of patient records in Coreo Analytics results in multiple patient records existing for a single person. Coreo Analytics deduplicates the duplicate patient record and merges with the existing patient record that is selected to be retained, and the other record is deleted.

When the deleted patient records are fetched into the Coreo View application though the nightly data-sync process that runs in the background, then the deleted patient details are displayed in the **Summary** window.

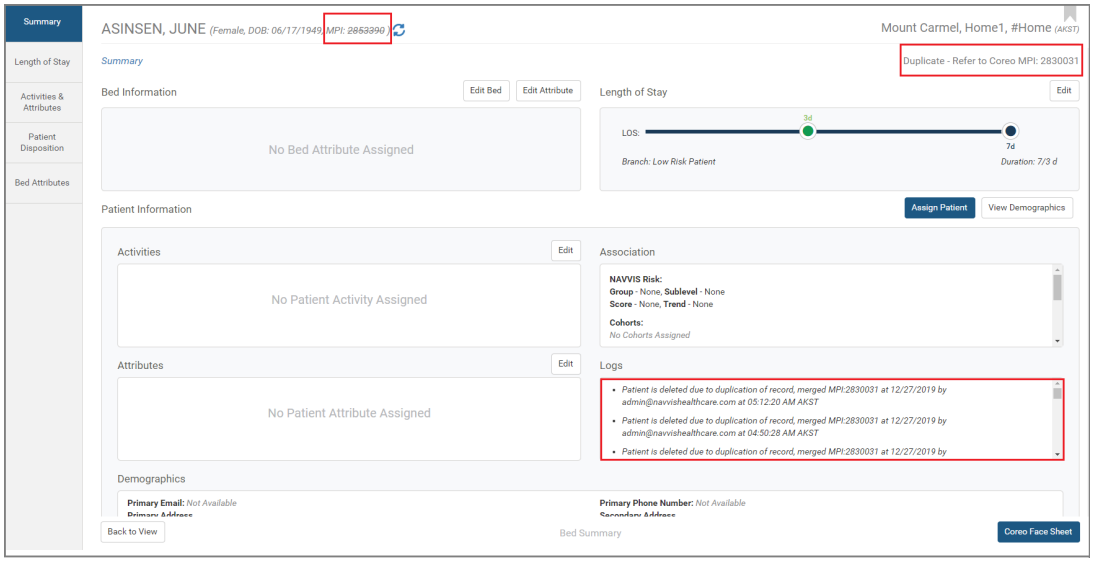


FIGURE 127. SUMMARY WINDOW–DELETED PATIENT RECORD

You can identify a duplicate patient in the **Summary** window through the following:

- The previous MPI of the patient is struck off and displays in the upper-left corner of the window.
- The label, "**Duplicate - Refer to Coreo MPI: [Number]**" displays in the upper-right corner of the window.
- Coreo View captures all the transactions related to the deleted or duplicate patient in the summary **Logs** section.

8.1.7 Inactive Patients

A patient record in Coreo Analytics is set to an Inactive status based on the information received from a health plan or system.

Coreo View fetches patients with any status-change (Active / Inactive) from Coreo Analytics during the nightly data-sync process.

In Coreo View, a patient with an Inactive status does not display either in the Bed View or Prioritized view or Geomap view.

When the patient status changes to either active or inactive, Coreo View captures the updates in the summary **Logs** section.

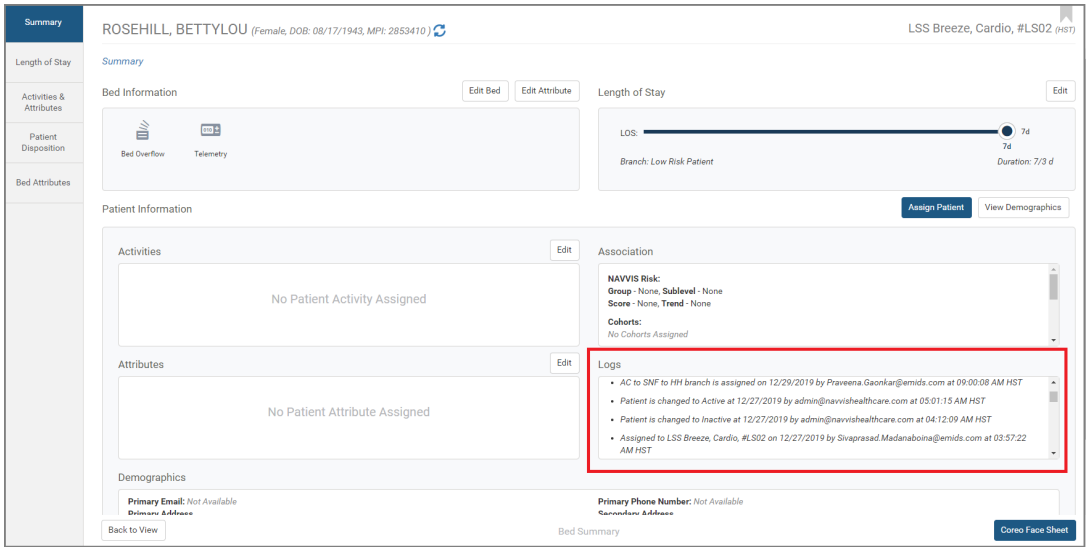


FIGURE 128. SUMMARY LOG–INACTIVE PATIENT CHANGED TO ACTIVE PATIENT

8.2 Coreo Summary

Follow these steps to view the Coreo Summary of a patient:

1. On the home page, on the side menu, select **Search** to perform a global search of patients.
2. The **Coreo Population Search** window opens.

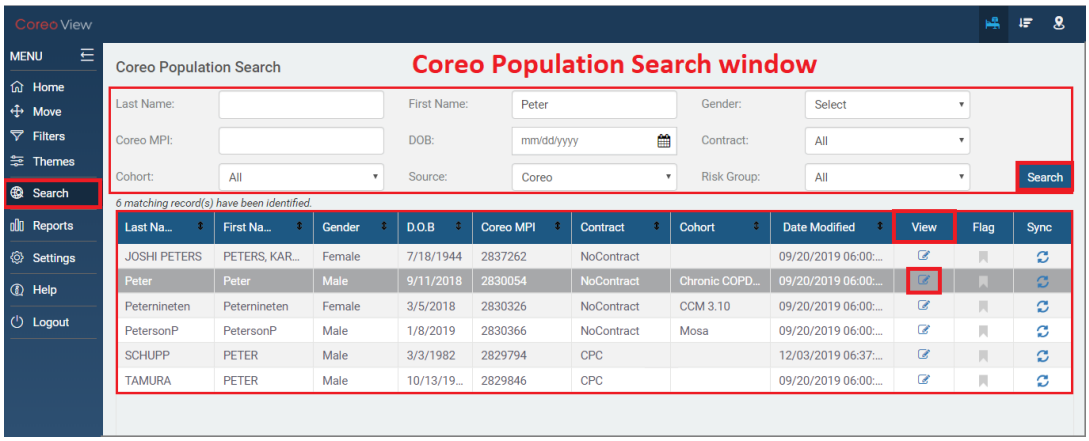


FIGURE 129. COREO POPULATION SEARCH WINDOW

3. Enter one or more criteria and search for a patient in the upper pane of the window.
4. Select the patient record for which you want to view the summary and select the **View** icon for that patient record. The **Patient Details** window opens.

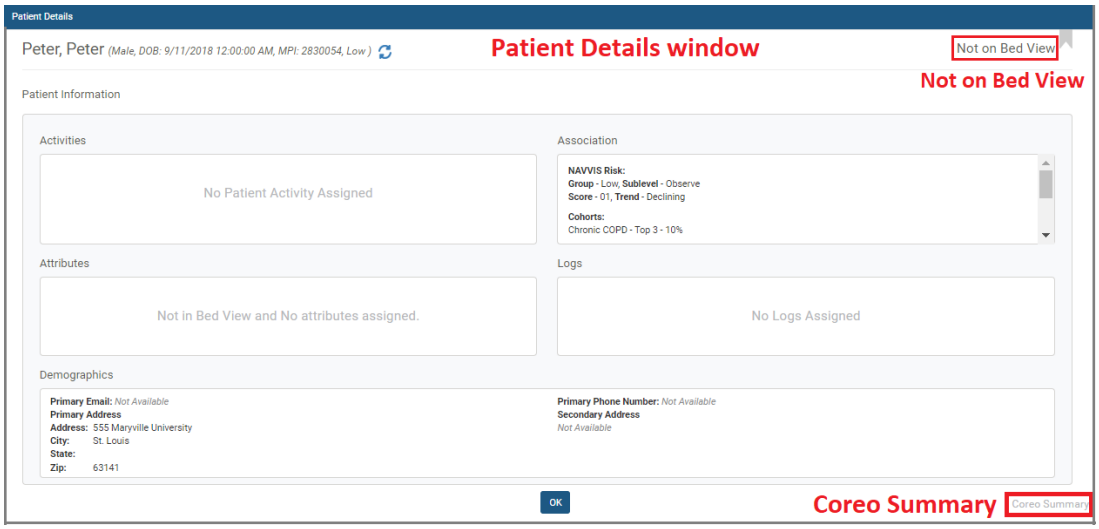


FIGURE 130. COREO SUMMARY–PATIENT DETAILS WINDOW

The **Coreo Summary** page in the **Patient Details** window generates for those Coreo patients who are not assigned to any bed in either of the three groups (AC, PAC, or CC) in the bed view.

In the upper-right corner of the **Coreo Summary** page, a label, **Not on Bed View** displays indicating that you have not assigned the patient to any bed cell in the bed view layout.

The **Coreo Summary** page displays the **Association** and **Demographics** of the Coreo patient.

The **Activities**, **Attributes,** and **Logs** sections are inactive as the patient is not in the bed view layout

5. Click the **OK** button to exit the **Patient Details** window.

8.3 Flagged Summary

Follow these steps to view the flagged summary of a patient:

1. On the home page, on the side menu, select **Search** to perform a global search of patients.
2. The **Coreo Population Search** window opens.

3. Enter one or more criteria to search for a patient in the upper pane of the window, and select the **Search** button.

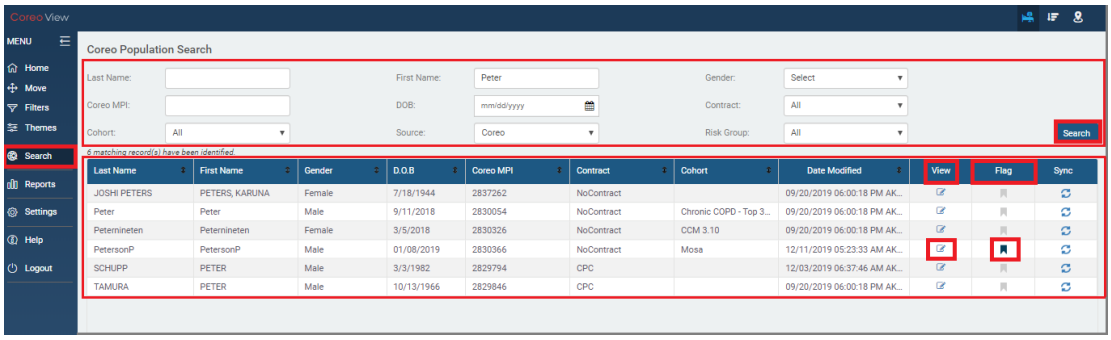


FIGURE 131. COREO POPULATION SEARCH WINDOW

The flagged patients meeting the search criteria are displayed in the lower pane. A blue flag icon in the **Flag** column indicates that the patient is in the flagged status.

4. To flag an un-flagged patient record, select the **Flag** icon for that patient.

You flag a Coreo patient record to monitor the patient even if the user has not assigned the patient to any bed cell (under AC, PAC, or CC) in Coreo View.

Refer to the **Flagging Patient Records** topic for more information on how to flag a patient.

5. Select the **View** icon for the flagged patient record to view the **Flagged Summary** of the patient.

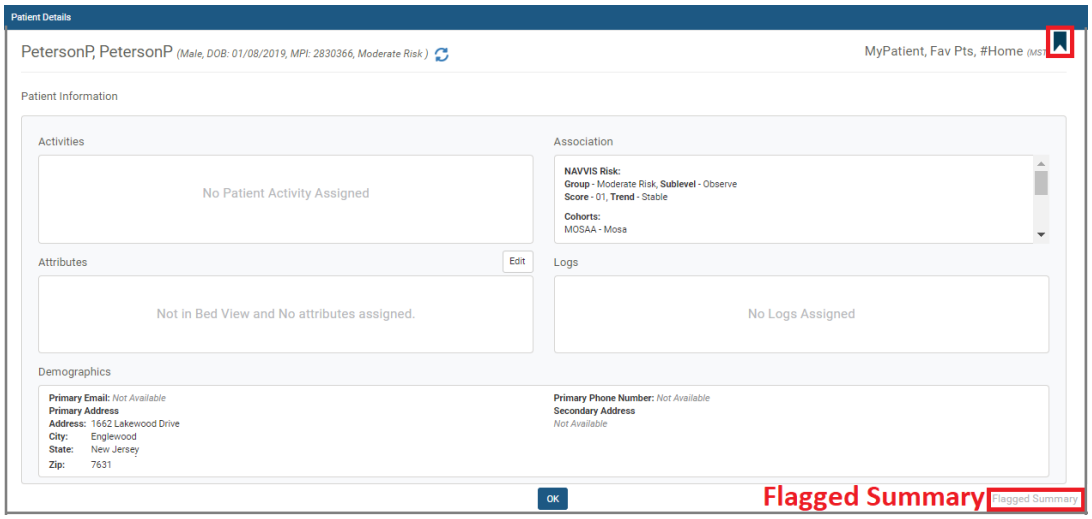


FIGURE 132. FLAGGED SUMMARY–PATIENT DETAILS WINDOW

In the upper-right corner of the **Flagged Summary** page, the flag icon is highlighted, indicating that the patient is in the flagged status.

The patient details displayed in the Flagged Summary is similar to that in the Coreo Summary.

Your Coreo View administrator creates a virtual group name and a virtual location to store all the flagged Coreo patients that are not assigned to any beds in Coreo View.

When you flag the Coreo patients, they automatically move to this virtual column, which displays as the first group under Cross Continuum. Coreo View generates an automated bed id, **HOME**, for the flagged Coreo patients just like for the beds in Cross Continuum.

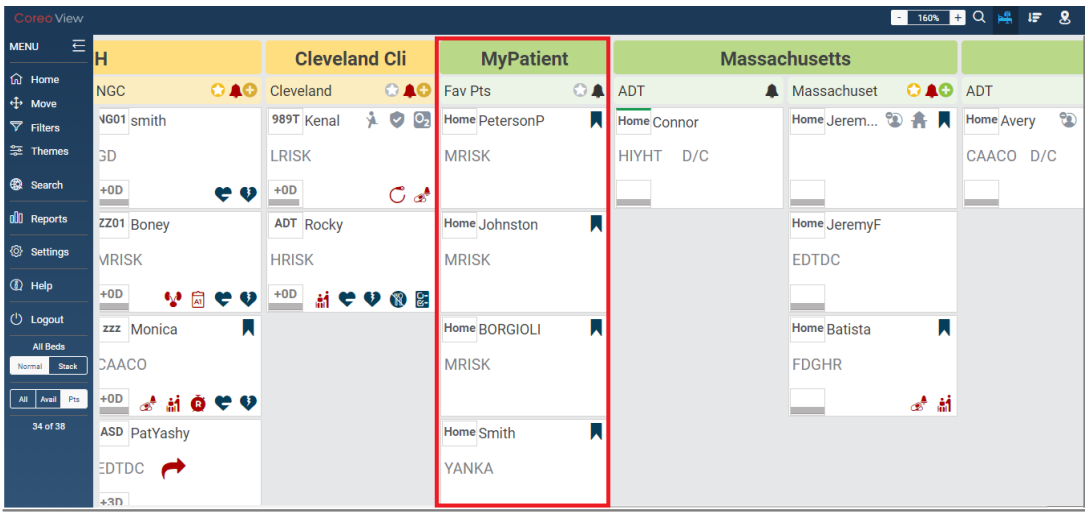


FIGURE 133. FLAGGED COREO PATIENTS

> **The summary of the flagged Coreo patient and that of the flagged Coreo View patient is different. The flagged Coreo View patient has a bed summary since they are assigned to a bed under one of the three groups (AC, PAC, and CC) in Coreo View.**

You can also open the **Flagged Summary** by selecting a flagged Coreo patient in the virtual bed cell.

9 Flagging Patient Records

Coreo View gives you the flexibility of flagging a patient record. You can flag a patient for the following reasons:

- When a patient in Coreo Analytics (also called Coreo) is not assigned to any bed (AC, PAC, or CC) in the Bed View and yet needs to be monitored in Coreo View.
- Flag a patient who is assigned to a bed cell under one of the care-level groups, AC, PAC, or CC in the bed view, if you want to mark the patient as a favorite for monitoring purposes.

9.1 Flag a Patient Record

In Coreo View, you can flag a patient record from the following:

- **Summary** window (Select the bed cell to open the **Summary** window)
- **Coreo Population Search** window (On the side menu, select **Search** to open the **Coreo Population** window)
- **Prioritized View** layout (On the header bar, select the **Prioritized View** icon to open the **Prioritized View** layout)
- **Geomap View** layout (On the header bar, select the **Geomap View** icon to open the **Geomap View** layout)

9.1.1 Summary Window

Follow these steps to flag a patient in the **Summary** window:

1. In the bed view, select a patient assigned to a bed cell whom you want to flag.

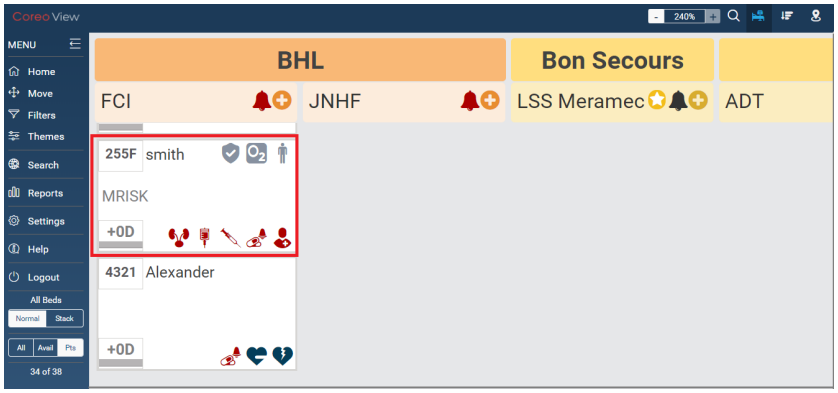


FIGURE 134. BED VIEW–UNFLAGGED PATIENT

2. The **Summary** window opens.

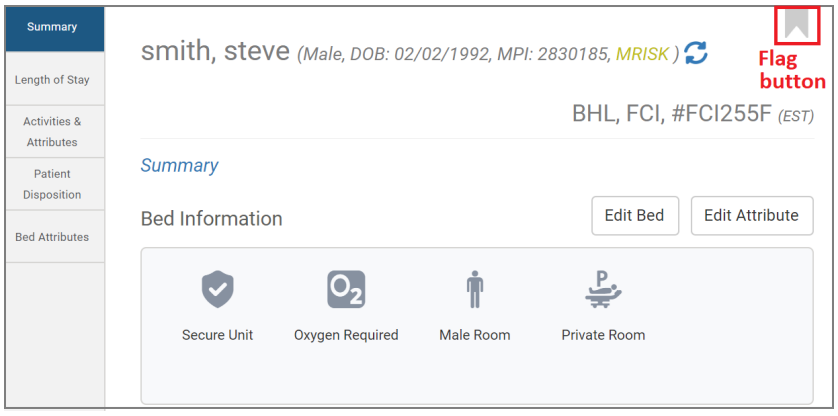


FIGURE 135. SUMMARY WINDOW–FLAGGING A PATIENT

3. Select the **Flag** icon in the upper-right corner of the **Summary** window to flag the patient record. An un-flagged patient record shows a light grey color icon. On selecting the Flag icon button, it changes to dark blue.
4. Select the **Back to View** button to exit the **Summary** window and view the changes in the relevant bed cell.

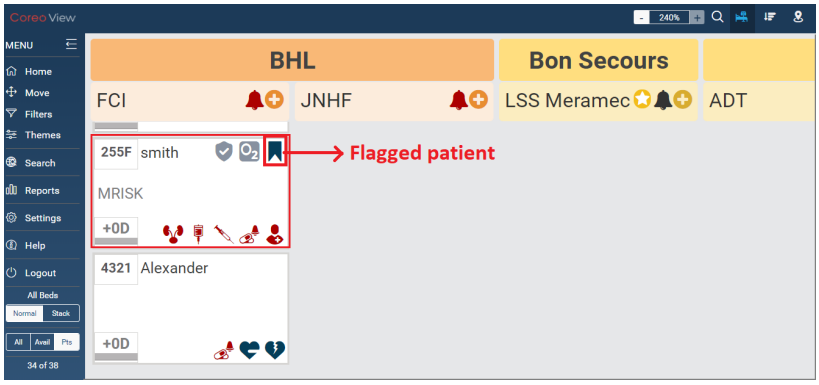


FIGURE 136. BED VIEW–FLAGGED PATIENT

You can notice that the bed cell displays a dark blue color flag icon, indicating that the patient is flagged.

For a flagged patient assigned to a bed cell, a bed summary is available and not a flagged summary.

9.1.2 Coreo Population Search Window

Follow these steps to flag a patient in the **Coreo Population Search** window:

1. On the side menu, select **Search** (global search) to open the **Coreo Population Search** window.

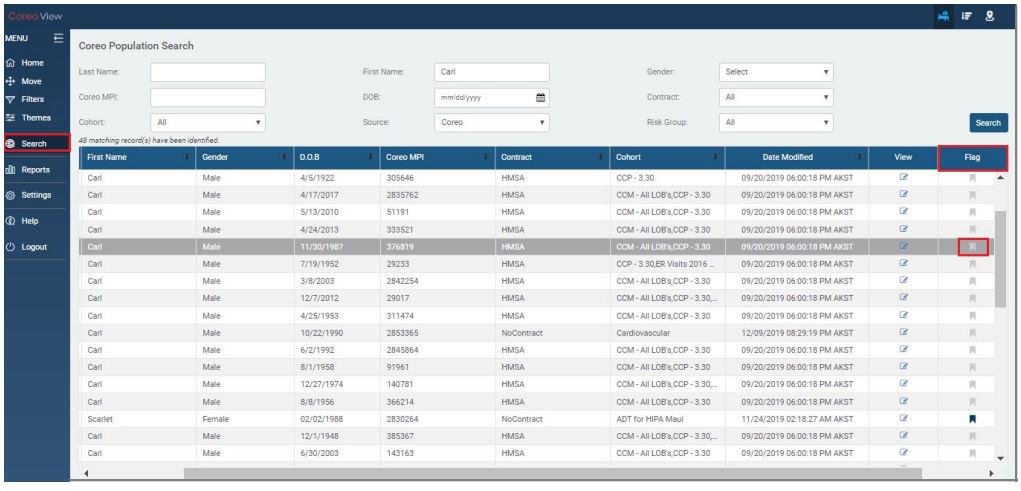


FIGURE 137. COREO POPULATION SEARCH WINDOW–FLAGGING A PATIENT

2. Enter the search criteria in the upper pane of the window to fetch the patient records.
3. Select the **Flag** icon for the patient record for which you want to flag.

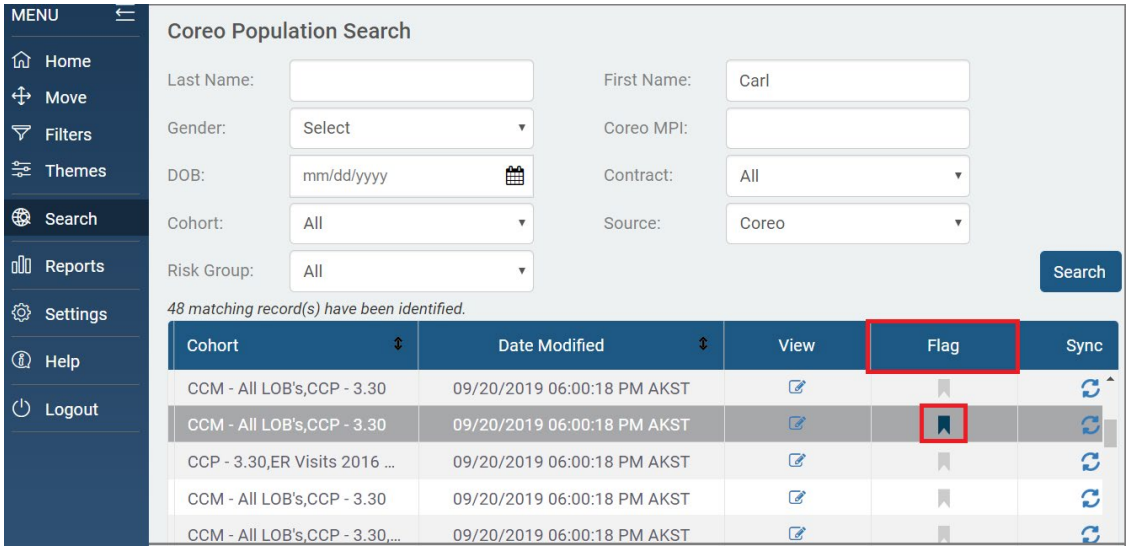


FIGURE 138. COREO POPULATION SEARCH WINDOW–FLAGGED PATIENT

The patient record displays a dark blue flag icon indicating that the patient is flagged.

9.1.3 Prioritized View Layout

Follow these steps to flag a patient in the **Prioritized View** layout:

1. On the header bar, select the **Prioritized View** button to open the **Prioritized View** layout.

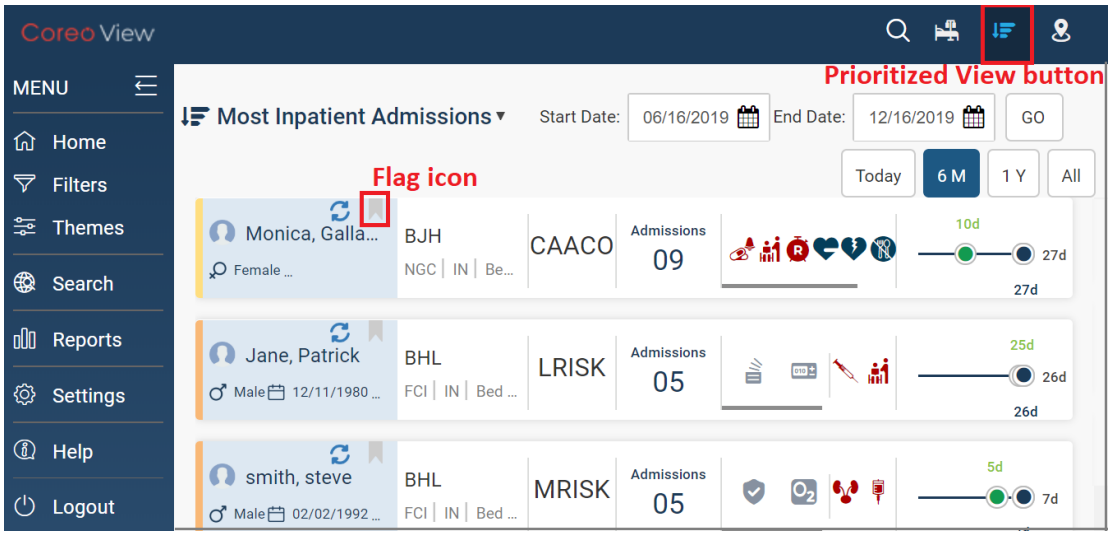


FIGURE 139. PRIORITIZED VIEW LAYOUT–FLAGGING A PATIENT

2. Select the **Flag** icon for the patient in the card view for which you want to flag.

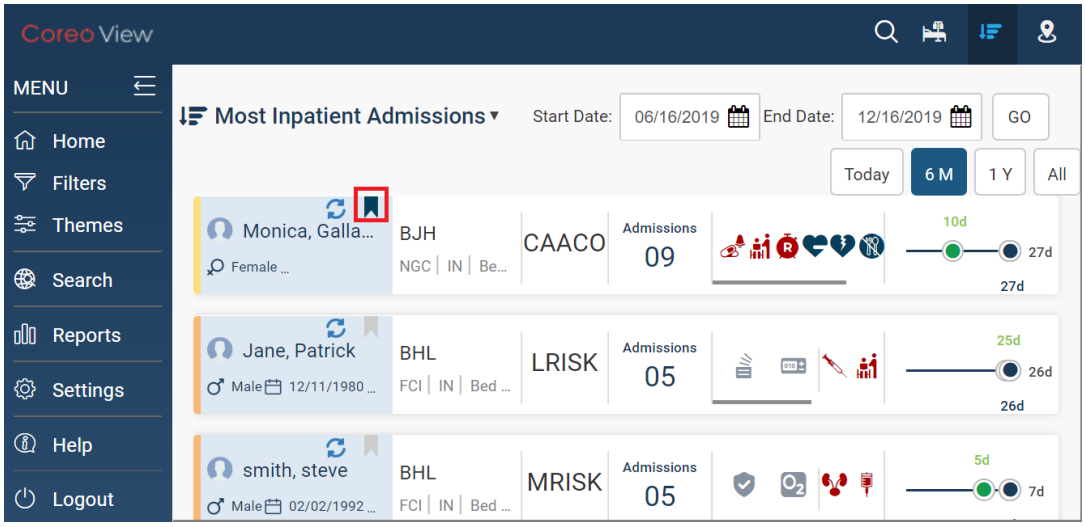


FIGURE 140. PRIORITIZED VIEW LAYOUT–FLAGGED PATIENT

The patient record displays a dark blue flag icon indicating that the patient is flagged.

9.1.4 Geomap View Layout

Follow these steps to flag a patient in the **Geomap View** layout:

1. On the header bar, select the **Geomap View** button to open the **Geomap View** layout.

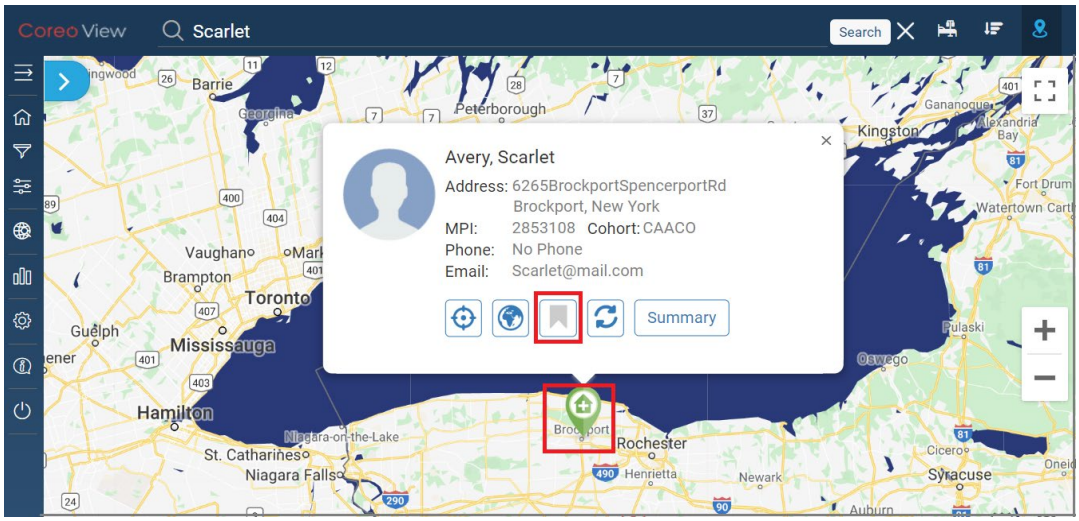


FIGURE 141. GEOMAP VIEW–CC GROUP PATIENT MARKER—FLAGGING A PATIENT

2. In the **Search** box on the header bar, enter the patient name who is assigned a bed in the CC group for which you want to flag the record.

The CC group patient marker opens.

3. Select the CC marker to open the information panel and then select the **Flag** icon.

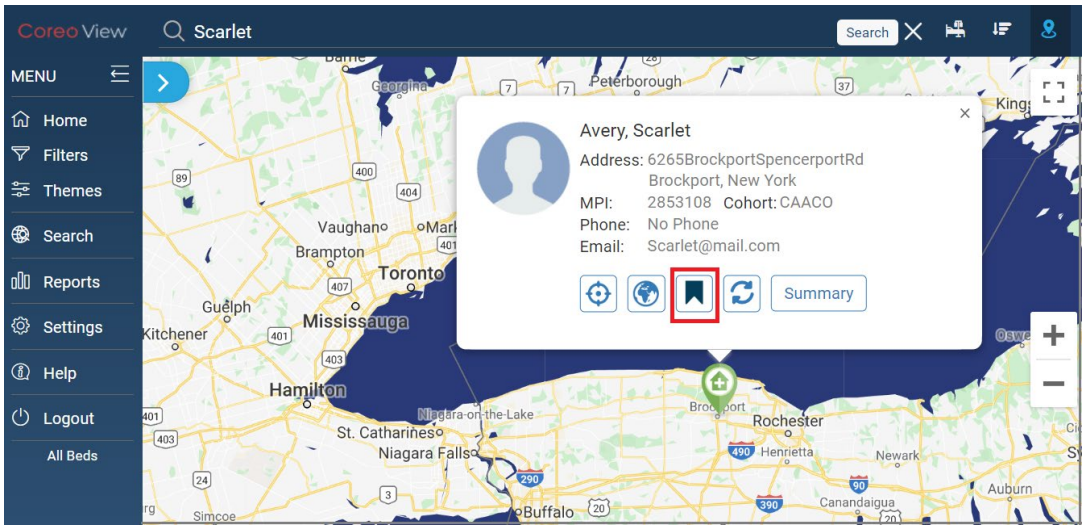


FIGURE 142. GEOMAP VIEW–CC GROUP PATIENT MARKER—FLAGGING A PATIENT

The patient record displays a dark blue flag icon indicating that the patient is flagged.

You can apply filter and view only the flagged patients using the **Filter** window. Refer to the Using Filters and Themes topic for more information.

10 General Reports

Coreo View gives you the provision to generate facility reports for the various aspects of patient information.

Facility reports provide access to key performances and to benchmark the information.

You can generate the following types of facility reports:

- **Patient Attribute Report**
- **Summary Report by Patient**
- **Patient Activity Report**
- **Summary Report by Location**
- **Alert Summary Report as of Today**
- **Facility Bed Summary**
- **Contract Bed Summary**
- **Contract Wise Accessible Population**

10.1 Patient Attribute Report

The patient attribute report displays the patient details based on the attributes defined in Coreo View such as **CHF**, **Chest Pain**, **NPO**, **Abnormal Lab**, among others that you assign to a patient when assigning the patient to the bed.

Follow these steps to generate the patient attribute report:

1. On the side menu, select **Reports** to open the **Reports** window. The window opens on the default tab page, **Facility Reports**.

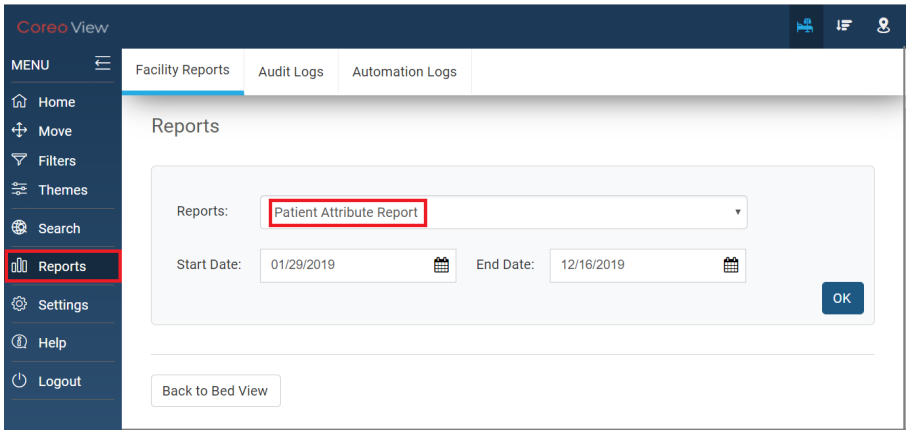


FIGURE 143. REPORTS WINDOW–PATIENT ATTRIBUTES REPORT

2. In the **Reports** box, select **Patient Attribute Report** from the drop-down list
3. In the **Start Date** box, enter the starting date for the period for which you want to generate the report.
4. In the **End Date** box, enter the ending date of the period for which you want to generate the report.
5. Select **OK.** The details are fetched in the lower pane of the window.

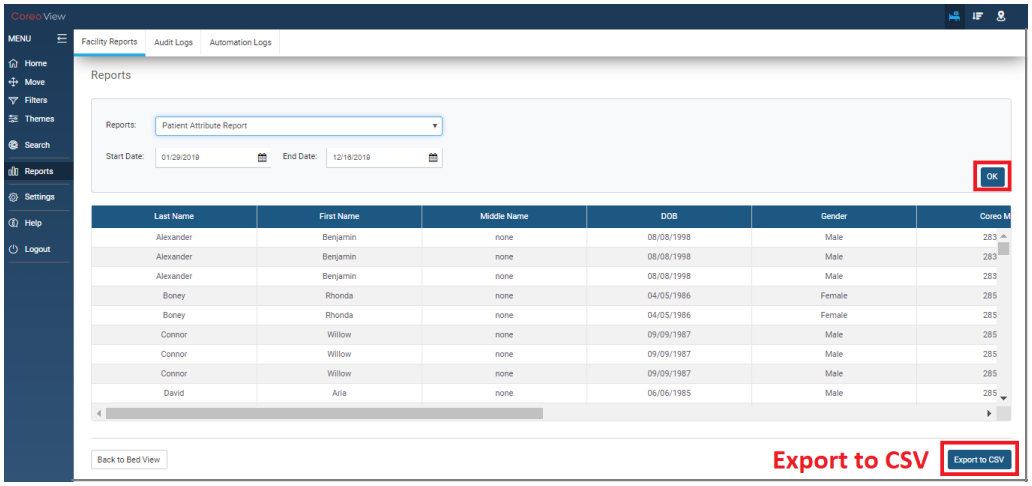
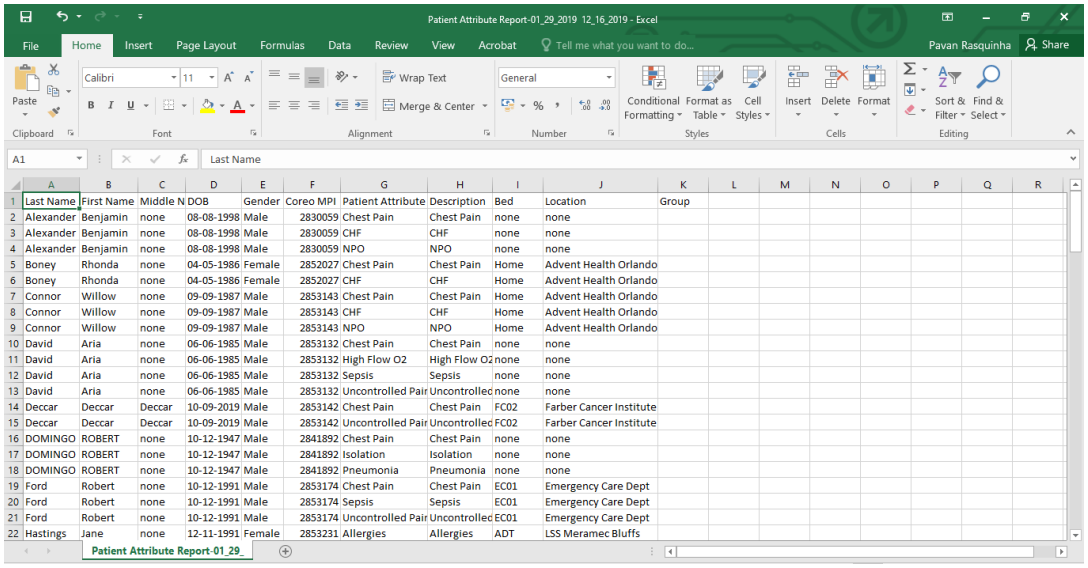


FIGURE 144. REPORTS WINDOW–PATIENT ATTRIBUTES REPORT IN THE LOWER PANE

6. Select the **Export to CSV** button to save the report in a CSV file.



Last Name	First Name	Middle N	DOB	Gender	Coreo MPI	Patient Attribute	Description	Bed	Location	Group
Alexander	Benjamin	none	08-08-1998	Male	2830059	Chest Pain	Chest Pain	none	none	
Alexander	Benjamin	none	08-08-1998	Male	2830059	CHF	CHF	none	none	
Alexander	Benjamin	none	08-08-1998	Male	2830059	NPO	NPO	none	none	
Boney	Rhonda	none	04-05-1986	Female	2852027	Chest Pain	Chest Pain	Home	Advent Health Orlando	
Boney	Rhonda	none	04-05-1986	Female	2852027	CHF	CHF	Home	Advent Health Orlando	
Connor	Willow	none	09-09-1987	Male	2853143	Chest Pain	Chest Pain	Home	Advent Health Orlando	
Connor	Willow	none	09-09-1987	Male	2853143	CHF	CHF	Home	Advent Health Orlando	
Connor	Willow	none	09-09-1987	Male	2853143	NPO	NPO	Home	Advent Health Orlando	
David	Aria	none	06-06-1985	Male	2853132	Chest Pain	Chest Pain	none	none	
David	Aria	none	06-06-1985	Male	2853132	High Flow O2	High Flow O2	none	none	
David	Aria	none	06-06-1985	Male	2853132	Sepsis	Sepsis	none	none	
David	Aria	none	06-06-1985	Male	2853132	Uncontrolled Pair	Uncontrolled	none	none	
Deccar	Deccar	Deccar	10-09-2019	Male	2853142	Chest Pain	Chest Pain	FC02	Farber Cancer Institute	
Deccar	Deccar	Deccar	10-09-2019	Male	2853142	Uncontrolled Pair	Uncontrolled	FC02	Farber Cancer Institute	
DOMINGO	ROBERT	none	10-12-1947	Male	2841892	Chest Pain	Chest Pain	none	none	
DOMINGO	ROBERT	none	10-12-1947	Male	2841892	Isolation	Isolation	none	none	
DOMINGO	ROBERT	none	10-12-1947	Male	2841892	Pneumonia	Pneumonia	none	none	
Ford	Robert	none	10-12-1991	Male	2853174	Chest Pain	Chest Pain	EC01	Emergency Care Dept	
Ford	Robert	none	10-12-1991	Male	2853174	Sepsis	Sepsis	EC01	Emergency Care Dept	
Ford	Robert	none	10-12-1991	Male	2853174	Uncontrolled Pair	Uncontrolled	EC01	Emergency Care Dept	
Hastings	Jane	none	12-11-1991	Female	2853231	Allergies	Allergies	ADT	LSS Meramec Bluffs	

FIGURE 145. REPORT SAVED IN A CSV FILE

Coreo View exports the report details to a CSV file. The CSV file is saved with the report-type name and the period for which it is generated.

The **Patient Attributes** report has the following details:

Last Name: The last name of the patient(s) for which you are viewing the assigned attributes and for which you want to generate the report.

First Name: The patient's first name

Middle Name: The patient's first name

DOB: The patient's date of birth

Gender: The patient's gender

Coreo MPI: The patient's Master Patient Index (MPI), a unique identification number generated for each patient in Coreo.

Patient Attribute: The attribute assigned to the patient.

Description: The description given for the attribute

Bed: The ID number of the bed to which the patient is assigned

Location: The location name of the facility in which the patient is admitted.

Group: The group name, the group to which the facility belongs where the patient is admitted.

10.2 Summary Report by Patient

Follow these steps to generate the **Summary Report by Patient**:

1. On the side menu, select **Reports** to open the **Reports** window. The window opens on the default tab page, **Facility Reports**.

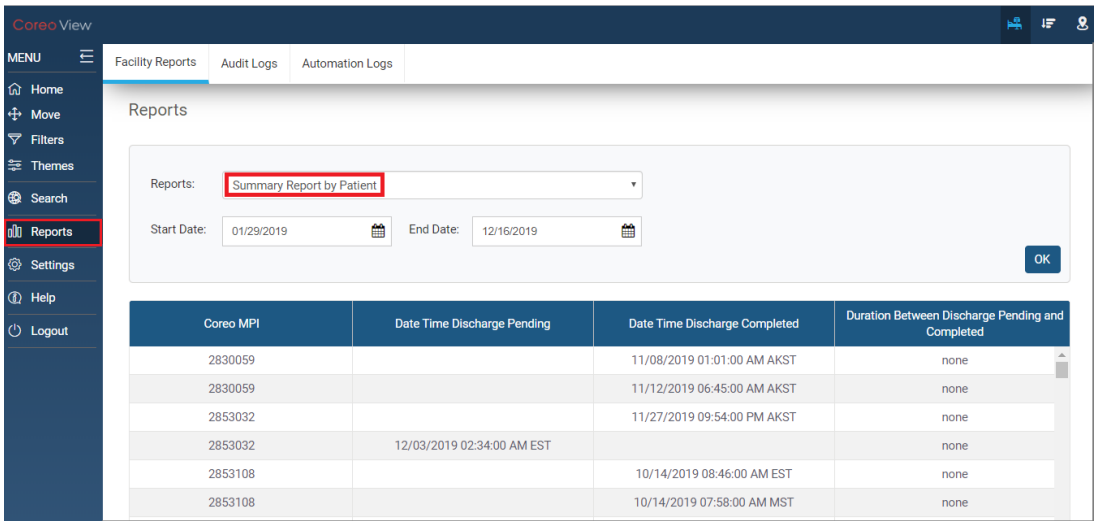


FIGURE 146. REPORTS WINDOW–SUMMARY REPORT BY PATIENT

2. In the **Reports** box, select **Summary Report by Patient** from the drop-down list
3. In the **Start Date** box, enter the starting date for the period for which you want to generate the report.
4. In the **End Date** box, enter the ending date of the period for which you want to generate the report.
5. Select **OK.** The details are fetched in the lower pane of the window.

The **Summary Report by Patient** report has the following details:

Last Name: The last name of the patient(s) for which you are generating the summary report.

First Name: The patient's first name

Middle Name: The patient's middle name

DOB: The patient's date of birth

Gender: The patient's gender

Coreo MPI: The patient's Master Patient Index (MPI), a unique identification number generated for each patient in Coreo.

Date Time Discharge Pending: The date and time at which the patient's discharge process was initiated based on the time zone of the patient's demography.

Date Time Discharge Completed: The date and time at which the patient's discharge process was completed based on the time zone of the patient's demography.

Duration Between Discharge Pending and Completed: The number of days between the initiated-discharge date and the completed-discharge date.

Bed: The ID number of the bed to which the patient is assigned

Location Name: The location name of the facility in which the patient is admitted.

Patient Attribute: The attribute assigned to the patient.

Patient Activity: The patient activities such as **Med Reminders, Ambulate**, assigned to the patient.

Group: The group name, the group to which the facility belongs where the patient is admitted.

6. Select the **Export to CSV** button to save the report in a CSV file.

10.3 Patient Activity Report

Follow these steps to generate the patient activity report:

1. On the side menu, select **Reports** to open the **Reports** window. The window opens on the default tab page, **Facility Reports**.

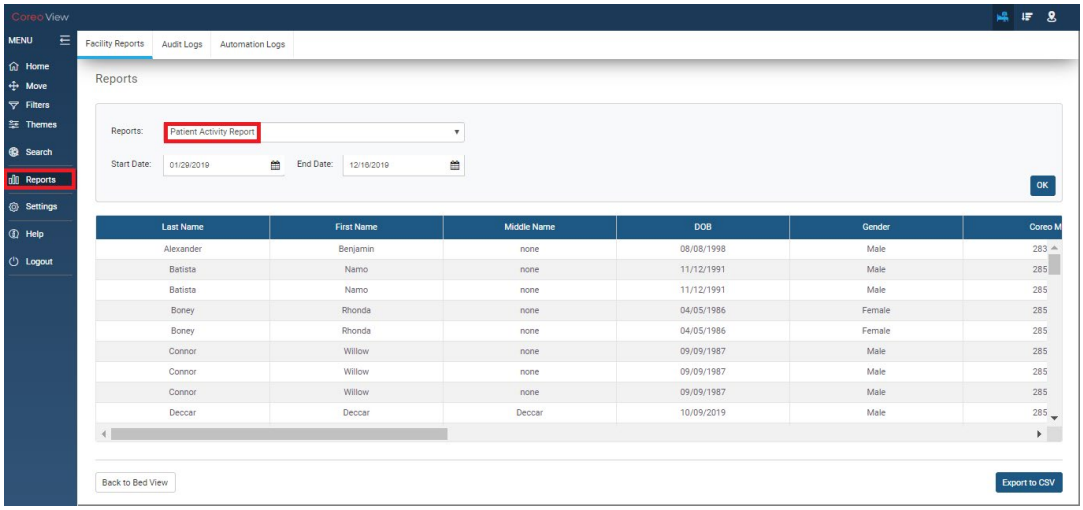


FIGURE 147. REPORTS WINDOW–PATIENT ACTIVITY REPORT

2. In the **Reports** box, select **Patient Activity Report** from the drop-down list
3. In the **Start Date** box, enter the starting date for the period for which you want to generate the report.
4. In the **End Date** box, enter the ending date of the period for which you want to generate the report.
5. Select **OK.** The details are fetched in the lower pane of the window.

The **Patient Activity Report** has the following details:

Last Name: The last name of the patient(s) for which you are viewing the assigned patient activities and for which you want to generate the report.

First Name: The patient's first name

Middle Name: The patient's first name

DOB: The patient's date of birth

Gender: The patient's gender

Coreo MPI: The patient's Master Patient Index (MPI), a unique identification number generated for each patient in Coreo.

Patient Activity: The patient activities such as **Med Reminders, Ambulate**, assigned to the patient.

Activity Description: The description given for the activity

Status: The status of the activity completion

Responsible Role: The role assigned to perform the activity

Time Initiated: The time at which the activity was initiated to be performed.

Alert Timeframe: The timeframe within which the assigned person must perform the activity

Bed: The ID number of the bed to which the patient is assigned

Location: The location name of the facility in which the patient is admitted.

Group: The group name, the group to which the facility belongs where the patient is admitted.

6. Select the **Export to CSV** button to save the report in a CSV file.

10.4 Summary Report by Location

Follow these steps to generate the summary report by location:

1. On the side menu, select **Reports** to open the **Reports** window. The window opens on the default tab page, **Facility Reports**.

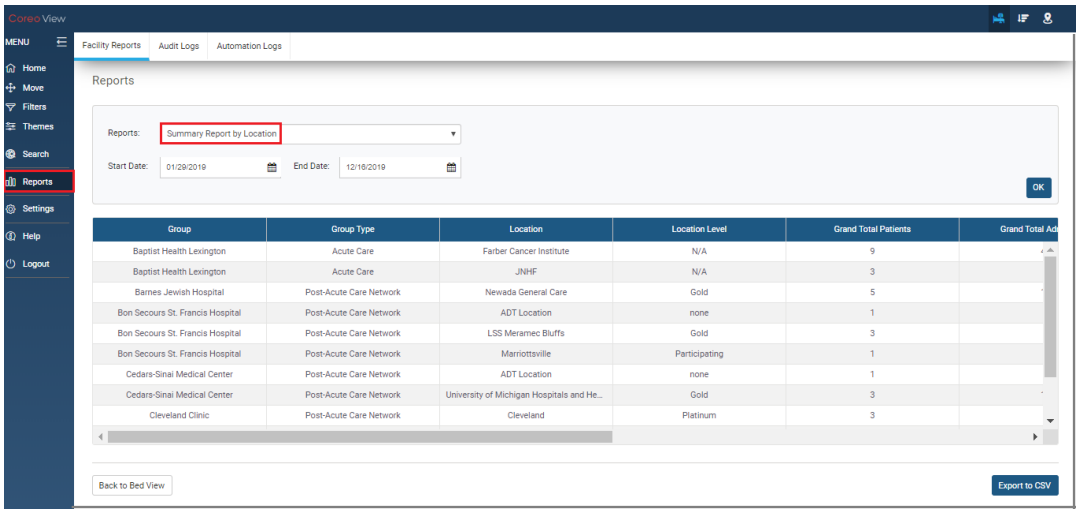


FIGURE 148. REPORTS WINDOW–SUMMARY REPORT BY LOCATION

2. In the **Reports** box, select **Summary Report by Location** from the drop-down list
3. In the **Start Date** box, enter the starting date for the period for which you want to generate the report.
4. In the **End Date** box, enter the ending date of the period for which you want to generate the report.
5. Select **OK.** The details are fetched in the lower pane of the window.

The **Summary Report by Location** report has the following details:

Group: The group to which the clinical facility belongs in a given location

Group Type: The three care levels, AC, PAC, and CC

Location: The location name in which the facility is situated and for which you want to generate the report

Location Level: NAVVIS's partnership agreement levels with the groups. **Platinum**, **Gold,** and **Participating** are the three tier-levels.

Grand Total Patients: The total number of patients assigned to the location

Grand Total Admissions: The total number of patient-admissions to the facility carried out for the location

Grand Total Discharge: The total number of patient-discharges from the facility carried out for the location

Total Patients: The total number of patients assigned to the location for the selected period

Total Admissions: The total number of patient-admissions to the facility done for the location for the selected period

Total Discharge: The total number of patient-discharges from the facility carried out for the location for the selected period

6. Select the **Export to CSV** button to save the report in a CSV file.

10.5 Alert Summary Report as of Today

Follow these steps to generate the alert summary report for the current date:

1. On the side menu, select **Reports** to open the **Reports** window. The window opens on the default tab page, **Facility Reports**.

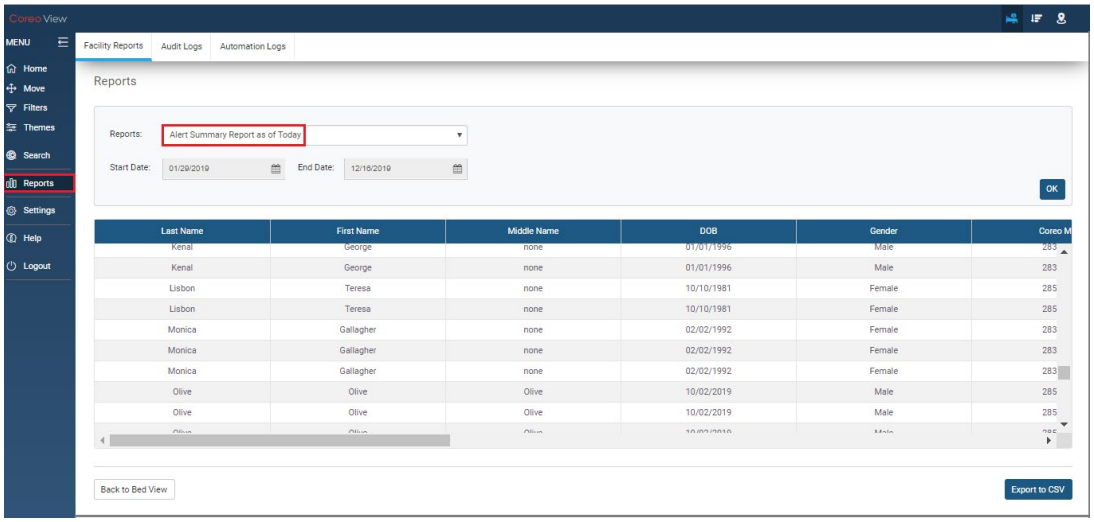


FIGURE 149. REPORTS WINDOW–ALERT SUMMARY REPORT AS OF TODAY

2. In the **Reports** box, select **Alert Summary Report as of Today** from the drop-down list
3. The **Start Date** box and the **End Date** box are not available for selection as the report is generated for the current date.
4. Select **OK.** The details are fetched in the lower pane of the window.

The **Alert Summary Report as of Today** report has the following details:

Last Name: The last name of the patient(s) for which you want to view the alert summary details and generate the report.

First Name: The patient's first name

Middle Name: The patient's first name

DOB: The patient's date of birth

Gender: The patient's gender

Coreo MPI: The patient's Master Patient Index (MPI), a unique identification number generated for each patient in Coreo.

Alert Type: The items, **Bed Cleaning**, **Disposition State** and the **Patient Activity,** for which the alert time frame is set

Alert Name: The tasks under the alert-type items

Alert Description: The description given when setting the alert timeframe

Alert Status: The status of the task completion

Alert Notification Period: The timeframe within which the assigned person must perform the task

Start Date: The date on which the task was initiated

Bed: The ID number of the bed to which the patient is assigned

Location: The location name of the facility in which the patient is admitted.

Group: The group name, the group to which the facility belongs where the patient is admitted.

5. Select the **Export to CSV** button to save the report in a CSV file.

10.6 Facility Bed Summary

Follow these steps to generate the facility bed summary report:

1. On the side menu, select **Reports** to open the **Reports** window. The window opens on the default tab page, **Facility Reports**.

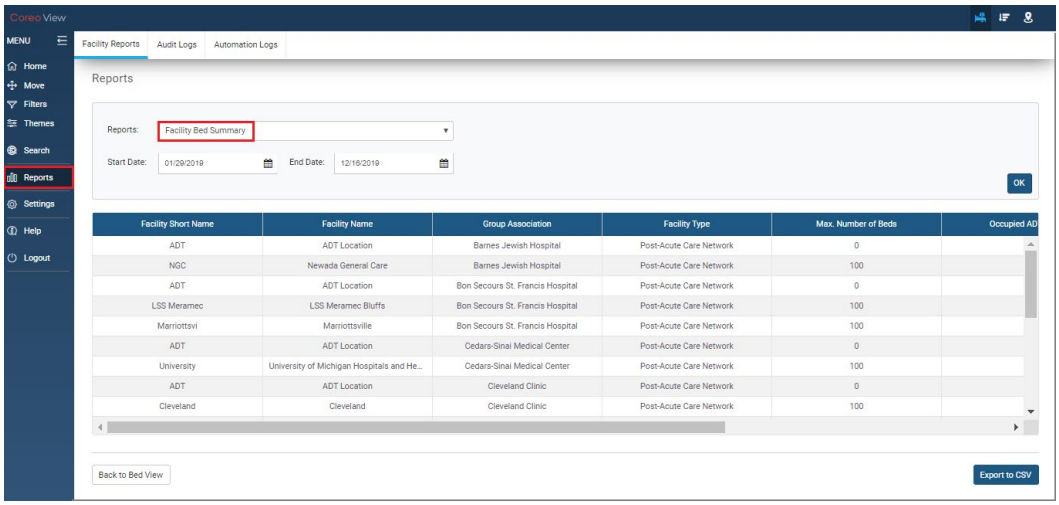


FIGURE 150. REPORTS WINDOW–FACILITY BED SUMMARY

2. In the **Reports** box, select **Facility Bed Summary** from the drop-down list

3. In the **Start Date** box, enter the starting date for the period for which you want to generate the report.
4. In the **End Date** box, enter the ending date of the period for which you want to generate the report.
5. Select **OK.** The details are fetched in the lower pane of the window.

The **Facility Bed Summary** report has the following details:

Facility Short Name: The short name of the clinical facility or the location in which the facility is situated

Facility Name: The name of the facility for which you want to view the report

Group Association: The group to which the facility belongs

Facility Type: The care level or the group type of the facility, AC, PAC or CC

Max. Number of Beds: The maximum number of beds available in the facility

Occupied ADT Beds: the number of occupied ADT beds

Occupied Beds: The number of beds occupied in the facility

Total Occupied Beds: The total number of occupied beds

6. Select the **Export to CSV** button to save the report in a CSV file.

10.7 Contract Bed Summary

Follow these steps to generate the patient activity report:

1. On the side menu, select **Reports** to open the **Reports** window. The window opens on the default tab page, **Facility Reports**.

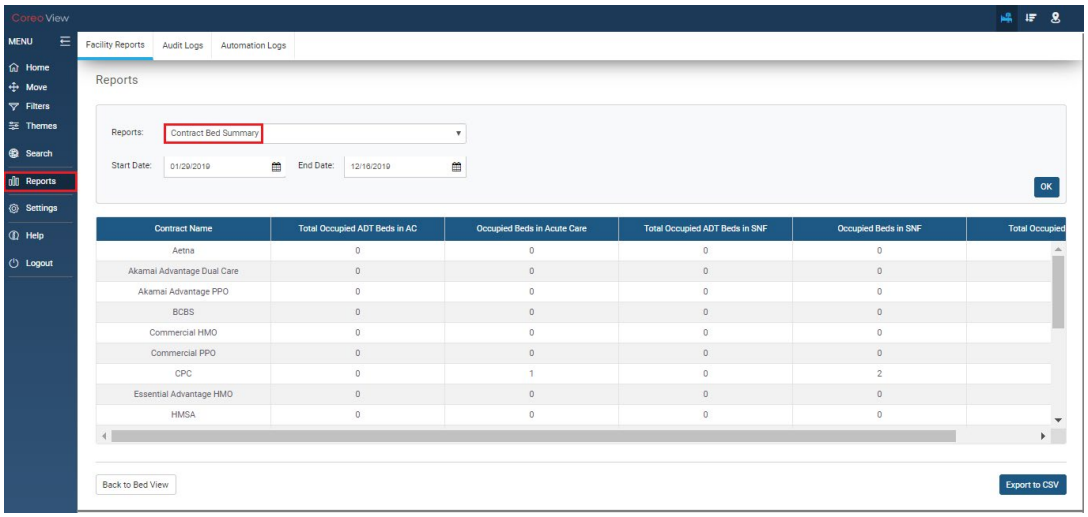


FIGURE 151. REPORTS WINDOW–CONTRACT BED SUMMARY

2. In the **Reports** box, select **Contract Bed Summary** from the drop-down list.

3. In the **Start Date** box, enter the starting date for the period for which you want to generate the report.
4. In the **End Date** box, enter the ending date of the period for which you want to generate the report.
5. Select **OK.** The details are fetched in the lower pane of the window.

The **Contract Bed Summary** report has the following details:

Contract Name: The contract name

Total Occupied ADT Beds in AC: The total number of ADT beds in AC occupied by patients belonging to the contract

Occupied Beds in Acute Care: The number of beds in AC occupied by patients belonging to the contract

Total Occupied ADT Beds in SNF: The number of ADT beds in PAC occupied by patients belonging to the contract

Occupied Beds in SNF: The number of beds in PAC occupied by patients belonging to the contract

Total Occupied Beds: The total number of patients in ADT beds and Regular beds, belonging to both AC and PAC.

6. Select the **Export to CSV** button to save the report in a CSV file.

10.8 Contract Wise Accessible Population

Follow these steps to generate the patient activity report:

1. On the side menu, select **Reports** to open the **Reports** window. The window opens on the default tab page, **Facility Reports**.

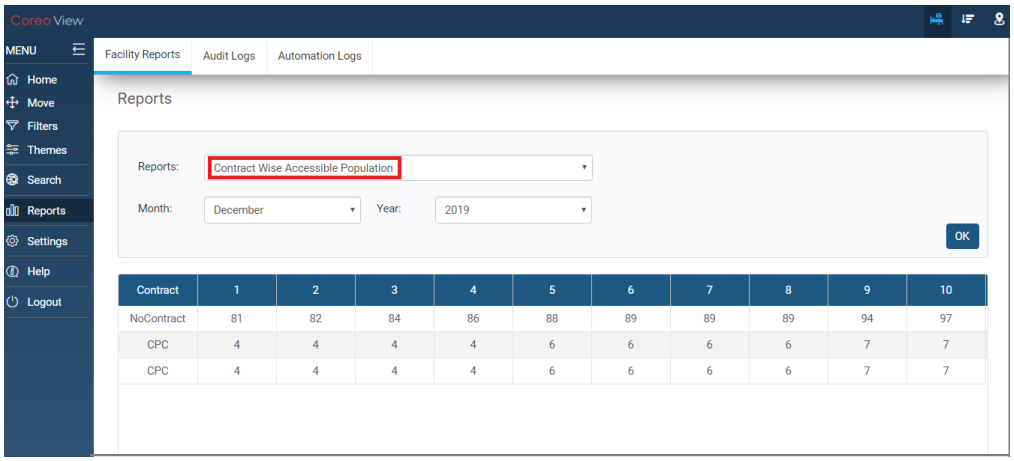


FIGURE 152. REPORTS WINDOW–CONTRACT WISE ACCESSIBLE POPULATION

2. In the **Reports** box, select **Contract Bed Summary** from the drop-down list.

3. In the **Month** box, select the month for which you want to generate the report.
4. In the Year box, select the year for which you want to generate the report.
5. Select **OK.** The details are fetched in the lower pane of the window.

The **Contract Wise Accessible Population** report has the following details:

- The **Contract** row displays the number of days for the month that you have select in the **Month** box.
- The **Contract** column displays the contract names for which the user has access to, based on the selected month and year.

The number displayed under each date of the month for a contract indicates the number of patients who are under that contract.

11 Synchronizing Patient View between UEE Applications with Coreo View

The view synchronization feature helps to establish consistency when viewing a patient record in different applications.

Synchronization allows harmonizing the patient record of one application with the same patient record of another application when viewing the applications in two or three different panels on your monitor screen.

Refer to the Navvis Unified Ecosystem Experience (UEE) User Guide for more information on the UEE feature.

In UEE, synching helps you to access the same patient record in the Coreo View application and Coreo Analytics application, simultaneously.

Similarly, you can view the same patient record in the Coreo View application and Coreo Care application, simultaneously.

There are four locations in the Coreo View application that you can synchronize the patient record from:

- From the **Bed View** layout–**Patient Summary** window
- From the **Prioritized View** layout
- From the **Global Map View** layout
- Through the global **Search** menu

11.1 Synchronize the Patient Record from the Coreo View-Bed View Layout

In UEE, you can sync a patient record at a time in a unidirectional manner. That is, you can sync a patient record only from the Coreo View application with the same patient record in Coreo Analytics, and not vice versa. That is, you cannot sync a patient record from Coreo Analytics with the patient record in Coreo View.

Similarly, you can only sync a patient record from the Coreo View application with the same patient record in Coreo Care and not vice versa.

Follow these steps to synchronize the patient record between Coreo View—bed view layout and Coreo Analytics:

1. Create a preset or apply an existing preset with the Coreo View application assigned to a panel and Coreo Analytics to another.

2. On the bed view layout, select the patient name that you want to synchronize the record within the Coreo Analytics application. You can use the **Search** button to search for the patient record.

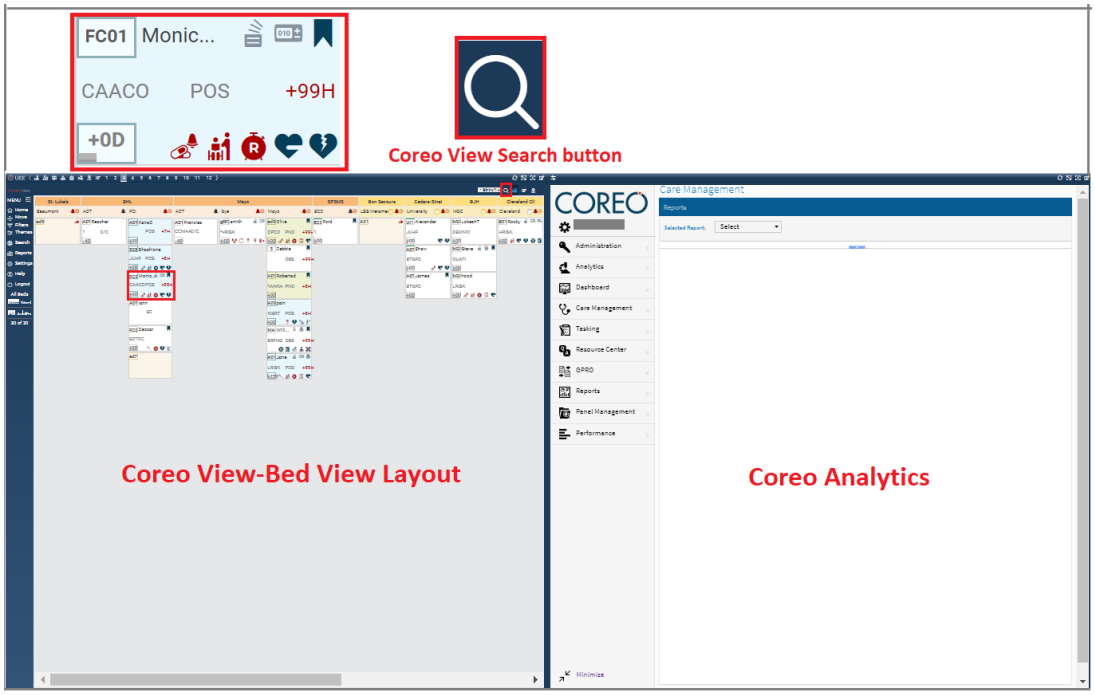


FIGURE 153. PANEL 1-BED VIEW LAYOUT-SEARCHING A PATIENT

The **Patient Summary** window opens.

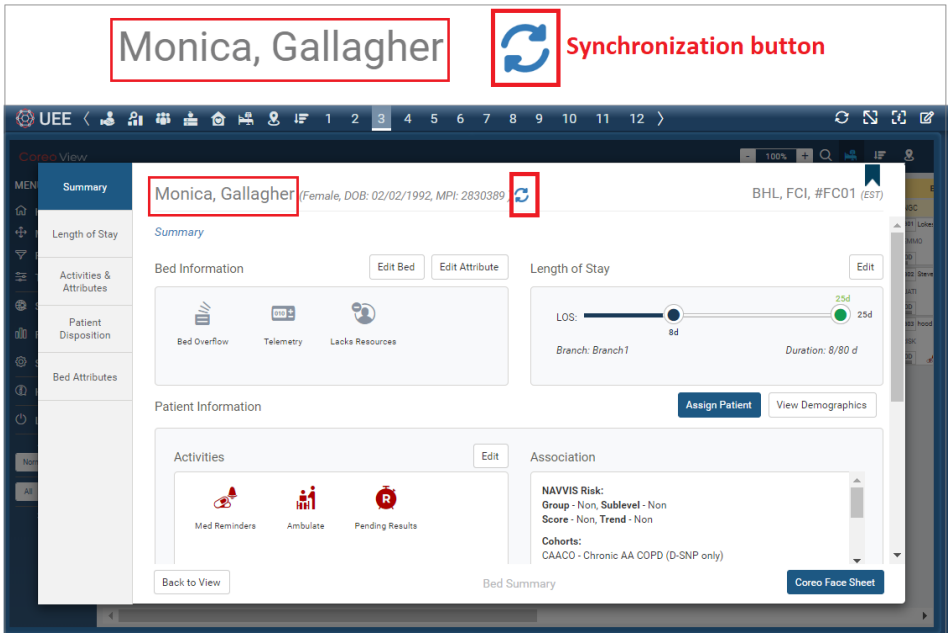


FIGURE 154. COREO VIEW—PATIENT SUMMARY WINDOW–SYNCHRONIZATION BUTTON

3. Click the **Synchronization** button to fetch the records of the same patient in Coreo Analytics.

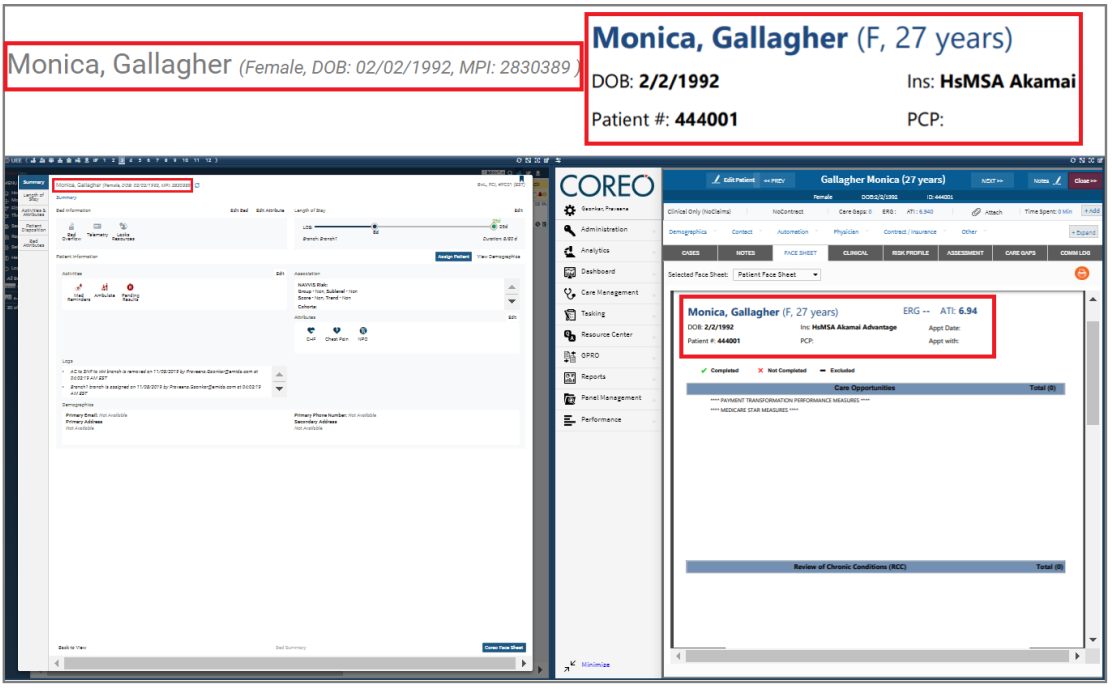


FIGURE 155. SYNCHRONIZED PATIENT RECORD

The details of the patient record that you had synchronized displays in the Coreo Analytics application.

11.2 Synchronize the Patient Record from the Coreo View-Prioritized View Layout

Follow these steps to synchronize the patient record between PV layout and CA:

1. Create a preset or apply an existing preset with the Coreo View application assigned to a panel and Coreo Analytics (CA) to another.

2. Click the **Prioritized View** button on the header toolbar in the Coreo View application to open the prioritized view layout.

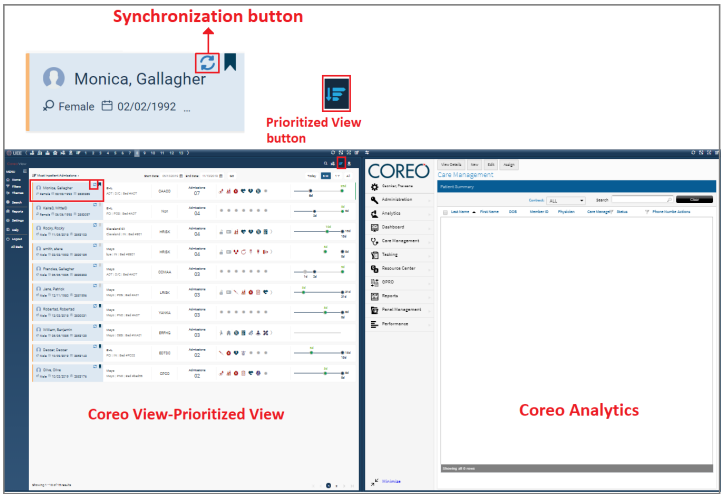


FIGURE 156. APPLICATIONS BEFORE SYNCHRONIZATION

3. Select the patient name that you want to synchronize the record within the Coreo Analytics application. Use the **Search** button to search for the patient record.

4. Click the **Synchronization** button to fetch the records of the same patient in CA.

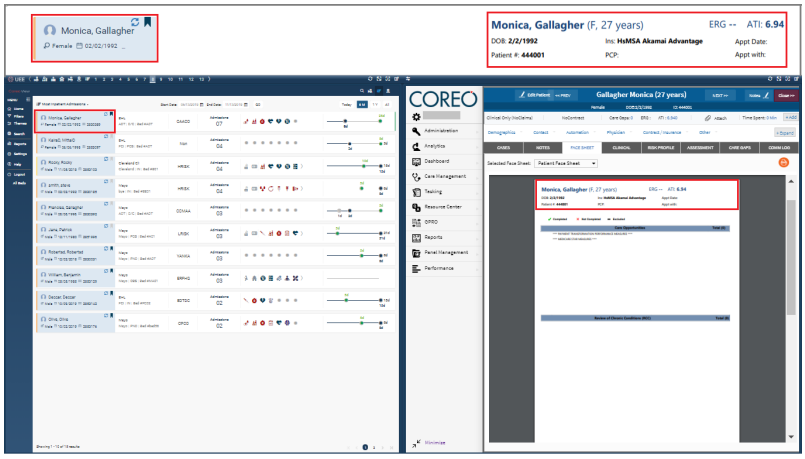


FIGURE 157. SYNCHRONIZED PATIENT RECORD—COREO VIEW-PRIORITIZED VIEW

The details of the patient record that you had synchronized displays in the CA.

11.3 Synchronize the Patient Record from the Coreo View—Geomap View Layout

Follow these steps to synchronize the patient record between Coreo View—prioritized view layout and Coreo Analytics:

1. Create a preset or apply an existing preset with the Coreo View application assigned to a panel and Coreo Analytics to another.

2. Click the **Prioritized View** button on the header toolbar in the Coreo View application to open the prioritized view layout.

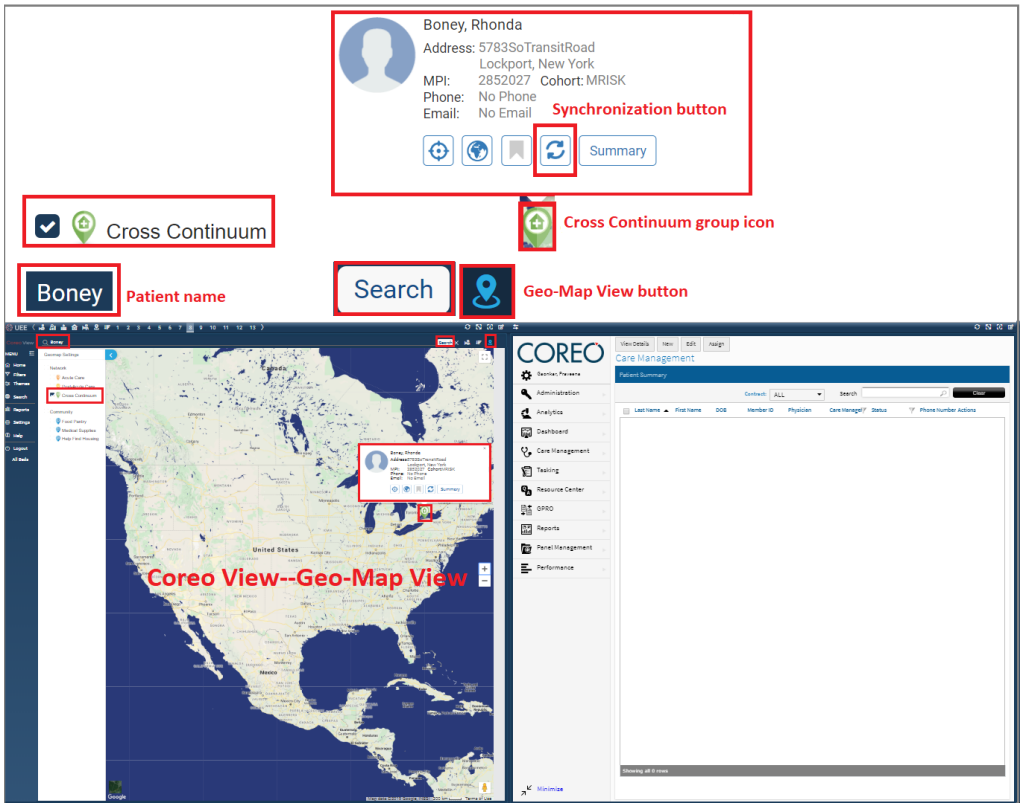


FIGURE 158. APPLICATIONS BEFORE SYNCHRONIZATION

3. Click the **Search** icon in the Geomap view layout and enter the patient name that you want to synchronize the record within the Coreo Analytics application.

4. Click the **Search** button to display the patient details in the geomap view layout.

5. Click the **Synchronization** button to fetch the records of the same patient in Coreo Analytics.

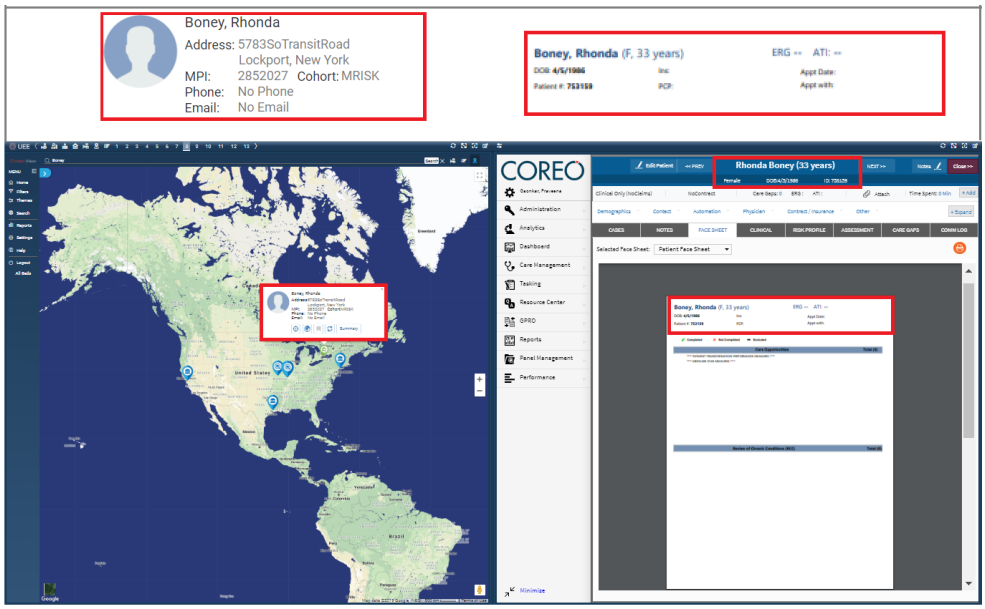


FIGURE 159. SYNCHRONIZED PATIENT RECORD—COREO VIEW-GEOMAP VIEW

The details of the patient record that you had synchronized displays in the Coreo Analytics application.

Exhibit: Coreo View and UEE Administrative Guide

1 Coreo View Administrator Tasks

The Navvis administrator has the super user privileges and creates the Coreo View administrator role. Okta provides a single secure home page to use the Coreo View application.

The Coreo View administrator manages the users and all the related administrative functions, which include the following:

- Manages the users of the Coreo View application
- Assigns roles and permissions to the users from the user groups

1.1 Okta Account Activation for the Coreo View Administrator

The Navvis administrator will register a user in Okta and assigns the administrative privilege and access to the Coreo View application. The Coreo View administrator-user manages the other Coreo View users.

The Navvis administrator sends an email notification to the Coreo View administrator-user to initiate the account activation process.

The Navvis administrator can create multiple Coreo View administrator accounts for the Coreo View application. However, the Coreo View administrator can only assign the administrator role to another user in Coreo view in addition to other user roles and access permissions.

Follow these steps to activate the Okta account:

1. Open the email link sent to your email inbox by the Navvis administrator.
2. Select the Activate Okta Account link in the email. The **Create your Navvis account** screen opens.

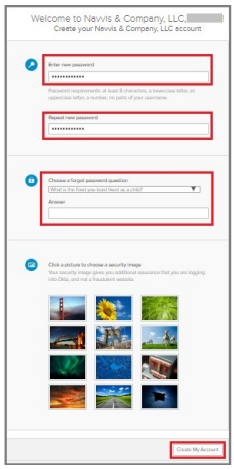


FIGURE 1. CREATE YOUR NAVVIS ACCOUNT SCREEN

3. Enter the new password in **Enter new password**. The password must be at least 8 characters long.

The password must be a combination of these following characters:

Description	Characters
Upper case characters	A–Z
Lower case characters	a–z
Digits	0–9
Special characters	~ ! @ # $ % ^ & * _ - + = ` | \ () {} [] : ; " ' < > , . ? /

Table 1. System Accepted Password Characters

4. Reenter the password in the **Repeat new password** box.

   The user must add a security question to reset a new password in the event of the user forgetting the password during the future use.

5. Under **Choose a forgot password** question on the **Create your Navvis & Company, LLC account** screen, select the arrow to view the questions.

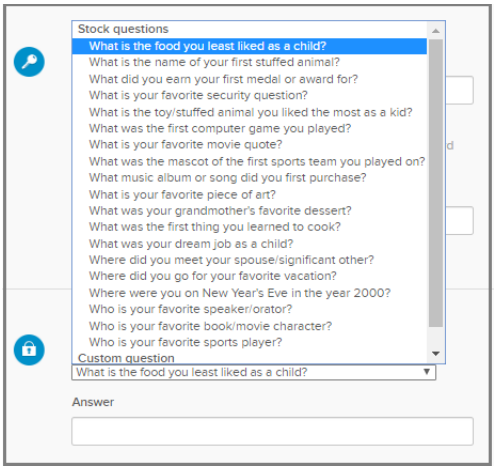


FIGURE 2. Choose A Forgot Password Question

6. Choose a security question from the list.
7. In the **Answer** box, enter the answer. You must remember this answer because it is used at a later date to reset a forgotten or expired password.
8. Choose a picture as a security image in the **Create your Navvis account** screen and then select **Create My Account**.

The security image displays in the Coreo Sign In screen on entering the user name.

9. The **Coreo** landing screen opens.

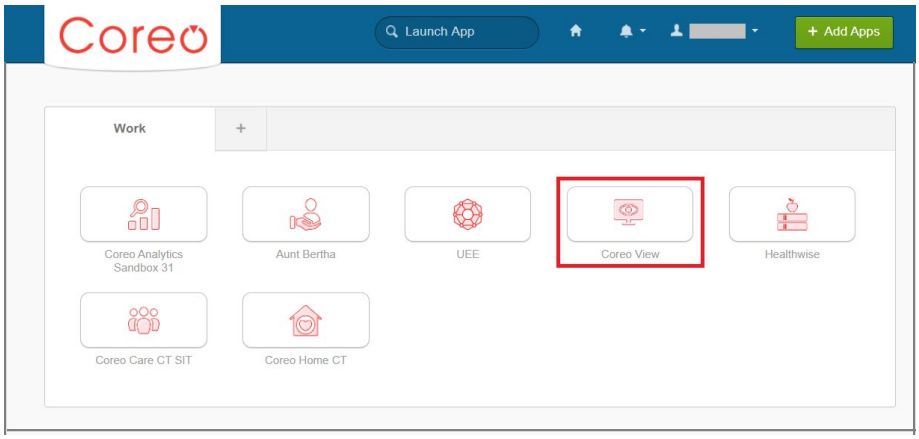


FIGURE 3. COREO LANDING SCREEN

10. Select the **Coreo View** button on the landing screen. The Coreo applications that you see on the Coreo landing screen depends upon the user-role and permissions assigned to you by your Navvis administrator.

11. The **Coreo Sign in** screen opens.

Once the user accepts EULA and the Okta SSO account is activated, the new user becomes an existing user.

As an existing user, go to login.coreohealth.com to open the Coreo Sign in screen.

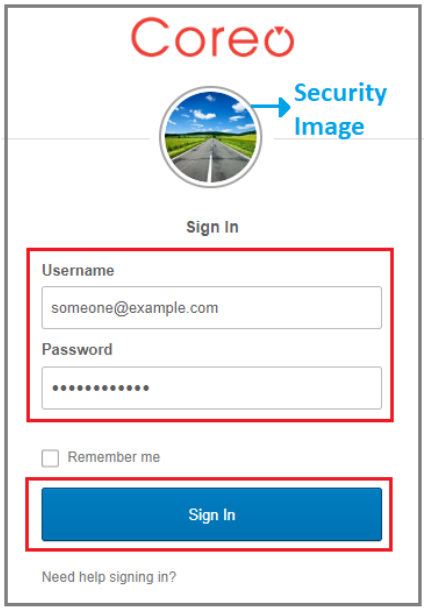


FIGURE 4. COREO SIGN IN SCREEN

12. Enter the user ID in the **Username** box.
13. Enter the password in the **Password** box. The password must be at least 8 characters long and a maximum of 25 characters.
14. Select **Sign In**.
15. The EULA screen displays for a first-time user of Coreo View. A first-time user of Coreo View is required to accept the EULA (End User License and Business Associate Agreement) before accessing the Coreo View application.

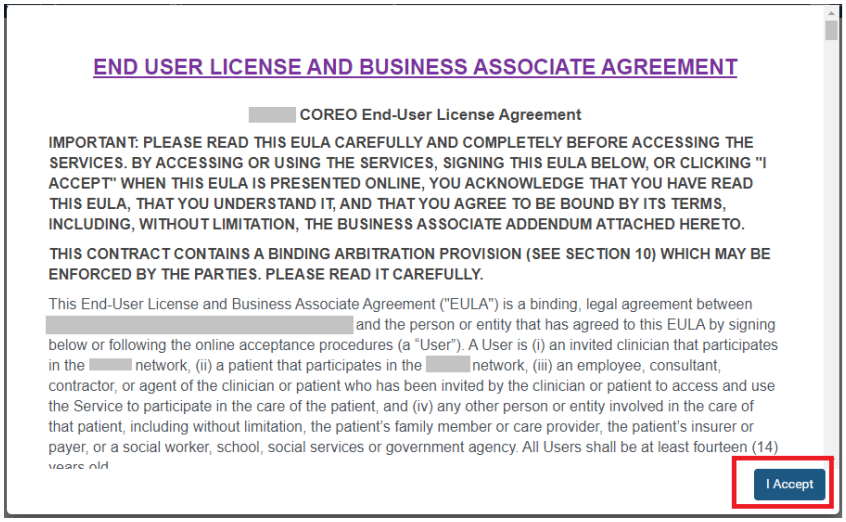


FIGURE 5. EULA SCREEN

16. Read the terms and conditions and select the **I Accept** button. Your Okta SSO account is activated successfully, and the Coreo View home page opens.

1.2 Manage Locked Okta SSO Account

The Okta SSO account locks for the following reasons:

- The user exceeds five failed login attempts within 24 hours. The login attempts fail when the user enters an incorrect password.

  The locked account resets after 24 hours, and the user can log in to the account after 24 hours without contacting the Navvis administrator.

> **To unlock the Okta SSO account immediately after the five failed login attempts, contact the Navvis administrator.**

- The Navvis administrator can lock the Okta SSO account as per the company lock account policy.

1.3 Reset a Forgotten or Expired Password

The Okta SSO password policy specifies that the password expires after 60 days, and the user must reset the password periodically.

Also, if the user forgets the password, Okta gives the option to reset the password.

Follow these steps to reset the password:

1. Go to login.coreohealth.com to open the **Coreo Sign In** screen.

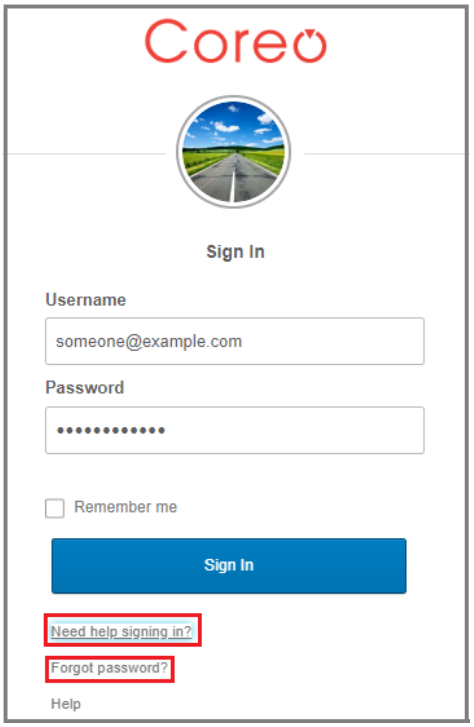


FIGURE 6. COREO SIGN IN SCREEN–NEED HELP SIGNING IN?

2. Select the **Need help signing in** drop-down list.
3. Select the **Forgot password** option to open the **Coreo Reset Password** screen.

FIGURE 7. COREO RESET PASSWORD SCREEN

4. Enter the e-mail or the user name in the **Email or Username** box.
5. Select **Reset via E-mail**. You will receive an email with a verification link from the Navvis administrator. You can reset the password using the verification link sent to your email address.
6. Reset the password with the following considerations:

- The new password cannot be among the previous six passwords.
- The password expires after 60 days, and the user must reset the password periodically.
- The user will be locked out of the application for 15 minutes after five failed login attempts. The login attempts fail when the user enters an incorrect password. Contact the Navvis administrator to reset the password.

On the successful resetting of the password, you can use the new password to log into your Okta SSO account.

2 Settings to Manage Coreo View Users

Set up the user management for Coreo View by creating hospital Groups of group-types AC, PAC, or CC, Locations, Users, User Roles, User permissions, User rosters, and Patient cohorts.

2.1 Create Groups

Follow these steps to add new groups:

1. On the side menu, select **Settings**. The default tab page, **Group Management** page opens.

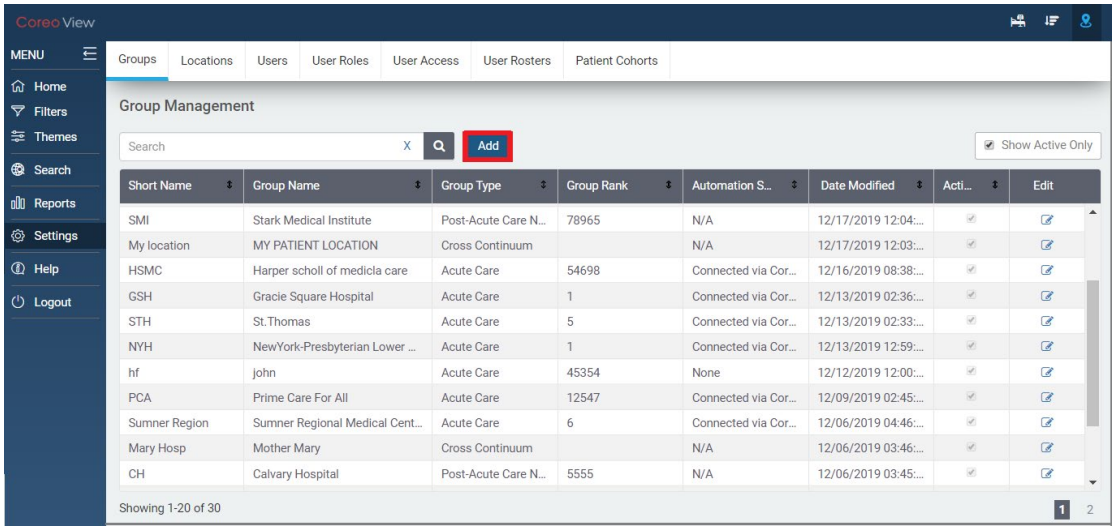


FIGURE 8. GROUP MANAGEMENT TAB PAGE

2. Select the **Add** button to open the **Add Group** page.

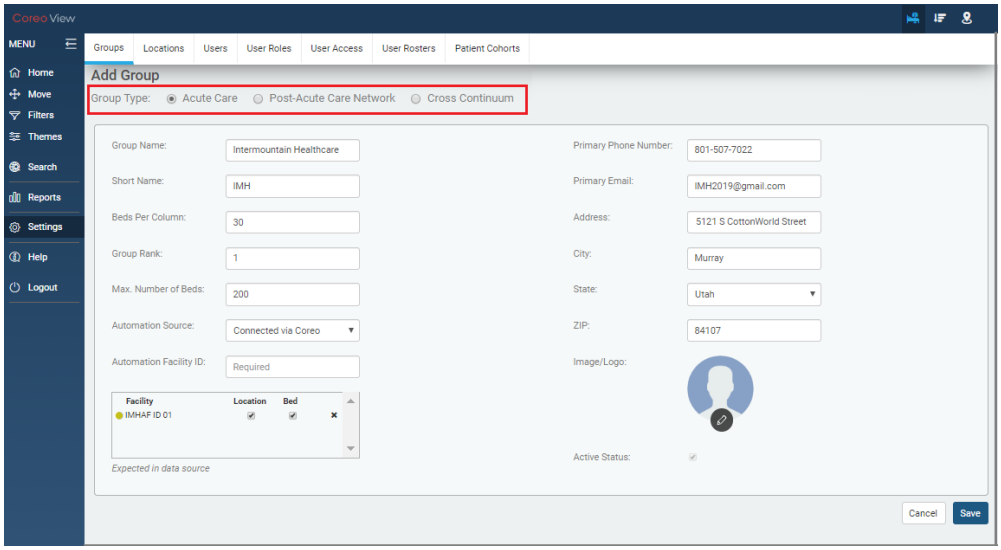


FIGURE 9. ADD GROUP WINDOW

3. Select the group type from the following:

- **Acute Care**: Acute Care (AC) group type includes an emergency department, intensive care, coronary care, cardiology, neonatal intensive care, among others.
- **Post-Acute Care Network**: In Post-Acute Care (PAC) group type, patients are cared for with skilled nursing facilities, inpatient rehabilitation facilities, long-term acute hospital facilities, among others.
- **Cross Continuum**: In the Cross Continuum (CC) group type, patients are cared at their home locations and are served by home-health and outpatient services.

Acute Care is the default group-type. Follow these steps to create a group of AC group-type in the **Add Group** window:

1. Enter the acute care group name in the **Group Name** box.
2. Enter a short name for the group in the **Short Name** box.

The group short-name is displayed in the bed view, prioritized view, geomap view (in the information panel), **Summary** window, and reports, among others. You can also use the short name to search the group in the search boxes when performing a local search.

3. View the number of beds allotted for each column for this group in the **Beds Per Column** box. You can modify this value.
4. View the group rank in the **Group Rank** box. The user can modify this value.

The group rank helps you to decide the order in which the groups must display in the bed view layout. If the group rank is one, the group displays in the first position in the bed view. If two or more groups have the same group rank, then Coreo View arranges the groups as per the alphabetical order of the group name.

5. View the maximum number of beds that are available for this group in the **Max. Number of Beds** box. You can modify this value.
6. Select the automation source in the **Automation Source** box from the following options:

- **None**: None is the default selection
- **Connected via Coreo**: On selecting the **Connected via Coreo** option, you are enabling the group to receive the synchronized ADT data. On selecting this option, you can view the **Automation Facility ID** box.

7. Click the **Automation Facility ID** box to display the Plus icon next to the box.
8. Select the Plus icon button to view the **Facility ID** box.
9. Enter the Facility ID under **Facility**, and select the **Location** check box and the **Bed** check box. The facility id helps the Coreo View application to identify this group as the one to which the patient must be admitted, discharged, or transferred when the automated ADT trigger event happens.

The facility ID entered for the group must match with the one in the HL7 file (for example, A01 event) so that when the background job runs for the ADT event, the patient in the HL7 file admits to this group based on the facility ID.

FIGURE 10. FACILITY ID BOX

10. Enter the primary phone number of the group in the **Primary Phone Number** box.
11. Enter the primary email address of the group in the **Primary Email** box.
12. Enter the address details of the group in the **Address** box. The **Address** is mandatory without which you cannot create the group. Coreo View can trace and locate the group address in the geomap view, only if you enter a valid address in this box.
13. Enter the name of the city in which the group is located in the **City** box. The **City** name is mandatory without which you cannot create the group.
14. Select the **State** arrow to view the states in the U.S region and then select the name of the state in which the group is located. The state name is mandatory without which you cannot create the group.

15. Enter the ZIP code of the region in which the group is located in the **ZIP** field. ZIP code is mandatory without which you cannot create the group.
16. Add an image of the group facility in **Image/Logo**. When you want to trace the group and the related information in the geomap layout, Coreo View displays this image in the group-marker information panel.
17. Select the **Save** button to save the changes and add the new group of AC group-types.

> **On saving the changes, you cannot view the newly added group on the Group Management tab page. To be able to view the newly added group, go to the User Access Management tab page, and provide permission to your user-access(to yourself). Refer to the User Access topic for information on how to edit the user-access.**

18. Similarly, on the **Add Group** page and in the **Group-Type**, select the **Post-Acute Care Network** radio button to create a group of PAC group-type. Enter the **Group Name**, **Short Name**, **Beds Per Column**, and **Group Rank** values and save them.
19. Likewise, select the **Cross Continuum** radio button and enter the details and save them to create a group of CC group-type.

2.2 Add Locations

Follow these steps to add a new location:

1. If you are not already in **Settings,** select **Settings** on the side menu. The default tab page, **Group Management** page opens.
2. Select the **Locations** tab to open the **Location Management** tab page.

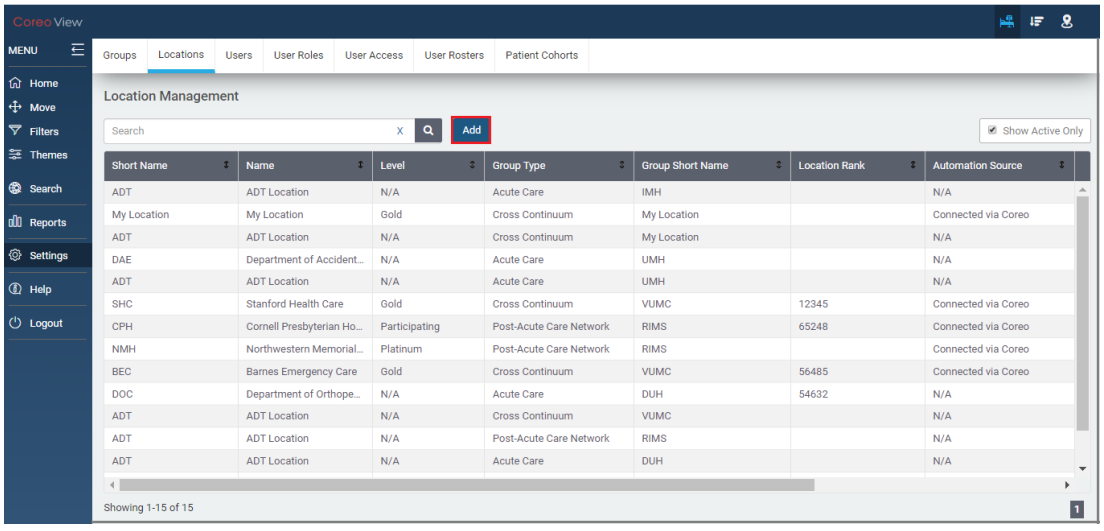


FIGURE 11. LOCATION MANAGEMENT TAB PAGE

3. Select the **Add** button to open the **Add Location** page.

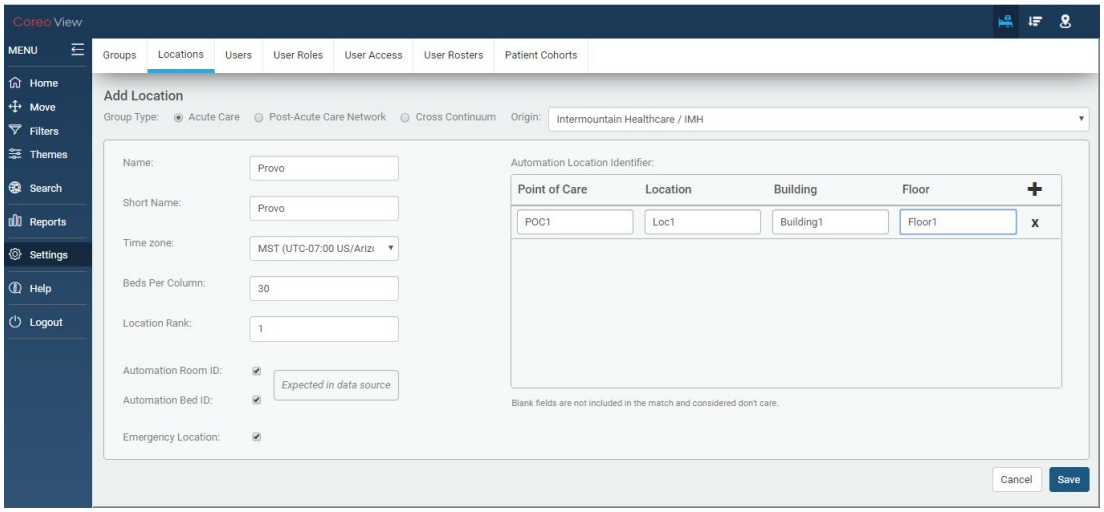


FIGURE 12. ADD LOCATION PAGE

4. **Acute Care** is the default group-type.
5. In the **Origin** drop-down box, select the group name under which you want to add the location.
6. Enter the location name in the **Name** box.
7. Enter a short name for the location in the **Short Name** box.
8. The location short-name displays in the bed view, prioritized view, information panel in the geomap view, in the **Summary** window, and reports, among others. You can also use the short name to search the location in the search boxes when performing a local search.
9. Select the time zone of the location in the **Time zone** drop-down box.
10. View the number of beds allotted for each column for this location in the **Beds Per Column** box. You can modify this value.
11. Enter or view the location rank in the **Location Rank** box. The user can modify this value.

The location rank helps you to decide the order in which the locations must display under a group in the bed view layout. If the location rank is one, the location displays in the first position under the group to which it belongs. If two or more locations have the same location rank, then Coreo View arranges the locations as per the alphabetical order of the location name.

12. Select the **Automation Room ID** check box and the **Automation Bed ID** check box to indicate that the Coreo View application is expecting the room id and the bed id from the HL7 file during the automated ADT trigger events. If the room id and the bed id are missing in the HL7 file, and the **Automation Room ID** and the **Automation Bed ID** check boxes are selected, then the status of the automated event changes to '**Warning**' in the automation logs, and Coreo View admits the patient specified in the HL7 file to the ADT bed in bed view.
13. Select the **Emergency Location** check box to identify the location as an emergency location for the automation event that run as a background job in Coreo View.
14. In the **Automation Location Identifier** box, select the plus icon to add the following details which helps Coreo View to identify this location as the one to which the patient must be either admitted, discharged, or transferred when the automated ADT trigger event happens:
    - **Point of Care**
    - **Location**
    - **Building**
    - **Floor**

If all the four values match with those in the HL7 files, the patient will be assigned to the location when the automated ADT trigger event happens.

15. Select the **Save** button to save the changes and add the new location. You can view the newly created location on the **Location Management** page.
16. Similarly, on the **Add Location** page and in the **Group-Type**, select the **Post-Acute Care Network** radio button to create a location of PAC group-type.
17. Enter the details as explained for the **Acute Care** location and save them.
18. Likewise, select the **Cross Continuum** radio button and enter the details and save them to create a location of CC group-type.

2.3 User Roles

The roles include the following:

- NAVVIS Admin Super User
- Administrator
- Hospital Role Types–Care Givers and Non-Clinical Roles
- PAC Role Types – PAC Site Admin, Care Givers, and Non-Clinical/EVF Roles
- Cross Continuum – CC Site Admin, Care Givers, and Non-Clinical/EVF Roles (Non-Clinical/EVF could include room cleaning activities)

Follow these steps to create user roles:

1. If you are not already in **Settings,** select **Settings** on the side menu. The default tab page, **Group Management** page opens.
2. Select the **User Roles** tab to open the **User Role Management** tab page.

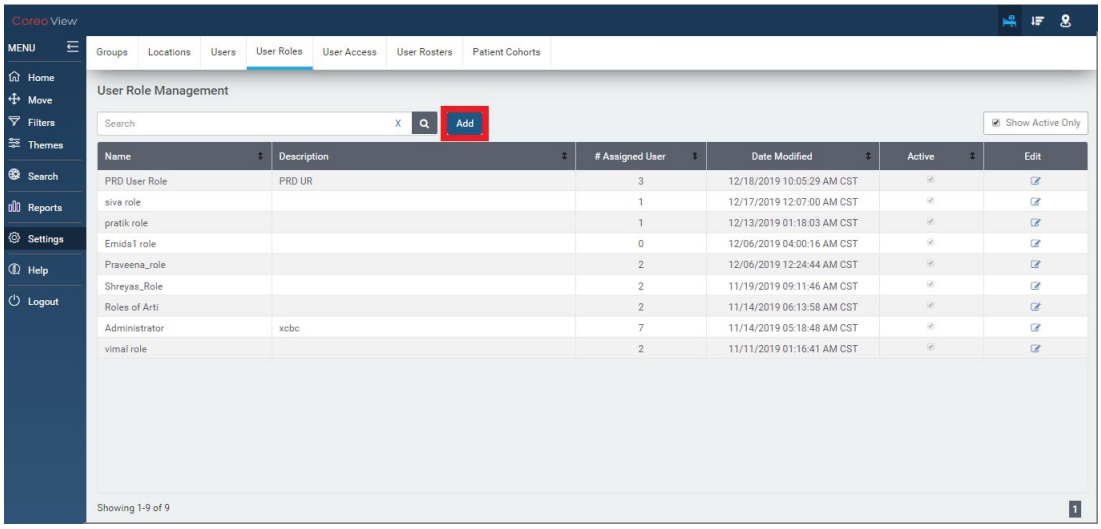


FIGURE 13. USER ROLE MANAGEMENT TAB PAGE

3. Select the **Add** button to open the **Add User Role** page.

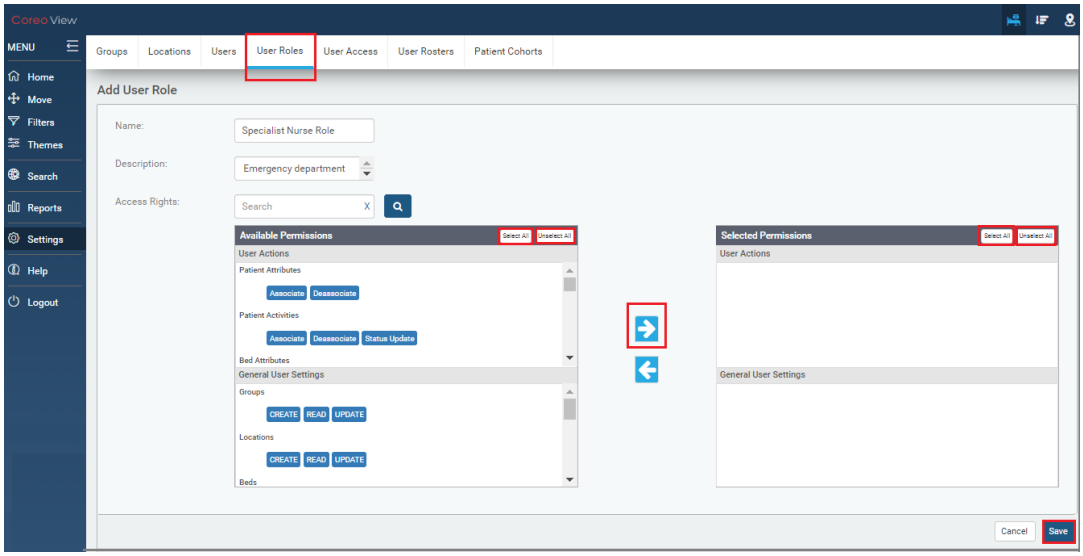


FIGURE 14. ADD USER ROLE TAB PAGE

4. Enter the user-role name in the **Name** field.
5. Enter a description for the user-role in the **Description** field.
6. Enter the access right for the Coreo View feature from the list under **User Actions** or **General User Settings** from the **Available Permissions** box in the **Access** search box.

7. Select the search icon to search the access rights for the Coreo View features. The list in the **Available Permissions** box displays based on the search keyword. However, you can also use the scroll bar in the **Available Permissions** box to search for the features to give access rights to the user role.
8. Select the features in the Available Permissions box to give permissions to the user role, or you can click the **Select All** button to select all the features to provide the access rights.
9. Select the blue color right arrow button to move the Coreo View features to the **Selected Permissions** box for which the user-role will have the access rights and permissions.

You can select the left arrow to exclude the access-right permissions from the **Selected Permissions** box and deny the permissions to that user role for the Coreo View features.

The available permission for the user role is detailed in the tabular column below:

User Actions	
Feature	**Permissions**
Patient Attributes	Associate, Deassociate
Patient Activities	Associate, Deassociate, Status Update
Bed Attributes	Associate, Deassociate
Bed Cleaning	Cleaning Required, Cleaning Complete
Move/Assign Patient	Request Move, Assign Patient, Accept Move, Reject Move, Cancel Move, Quick Move
Providers & LOS	Length of Stay
Patient Disposition	Observation, Admitted, Discharge Possible, Discharge Pending, Discharge Complete, Emergency
Patients	READ, UPDATE, DELETE
Audit Trail Reports	READ, Download
Reports	READ, Download
Automation Logs	READ, UPDATE
Move/Transfer Patient	Transfer Patient
Cohort Management	Bulk Assign
Notifications	Roster Updates

General User Settings	
Feature	**Permissions**
Groups	CREATE, READ, UPDATE
Locations	CREATE, READ, UPDATE
Beds	CREATE, READ, UPDATE, DELETE
Users	CREATE, READ, UPDATE, DELETE
User Roles	CREATE, READ, UPDATE
User Access	CREATE, READ, UPDATE
Rosters	CREATE, READ, UPDATE
Cohorts	READ, UPDATE

Table 2. USER ROLES–AVAILABLE PERMISSIONS

10. Click **Save** to save the permissions to the newly created user role for the selected Coreo View features.

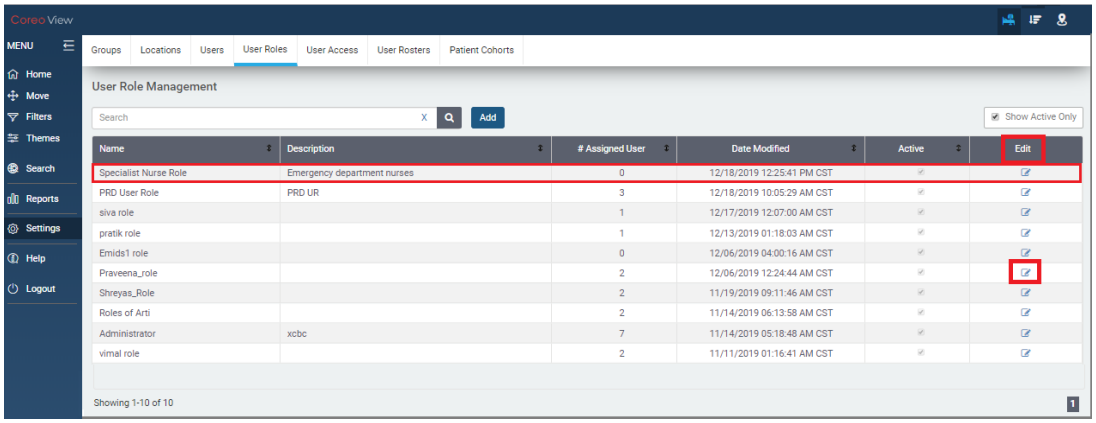


FIGURE 15. USER ROLE MANAGEMENT TAB PAGE

11. View the newly created user role on the **User Role Management** tab page.

You can also edit an existing user-role.

12. Select the user-role row which you want to edit and select the edit icon in the **Edit** column.

13. The **Edit User Role** tab page opens. Edit the required values and save the changes.

2.4 User Access

The administrator can create a user-access and attach the group to the user access.

Follow these steps to create a user-access and attach a group.

1. If you are not already in **Settings,** select **Settings** on the side menu, the default tab page, **Group Management** page opens.
2. Select the **User Access** tab to open the **User Access Management** tab page.

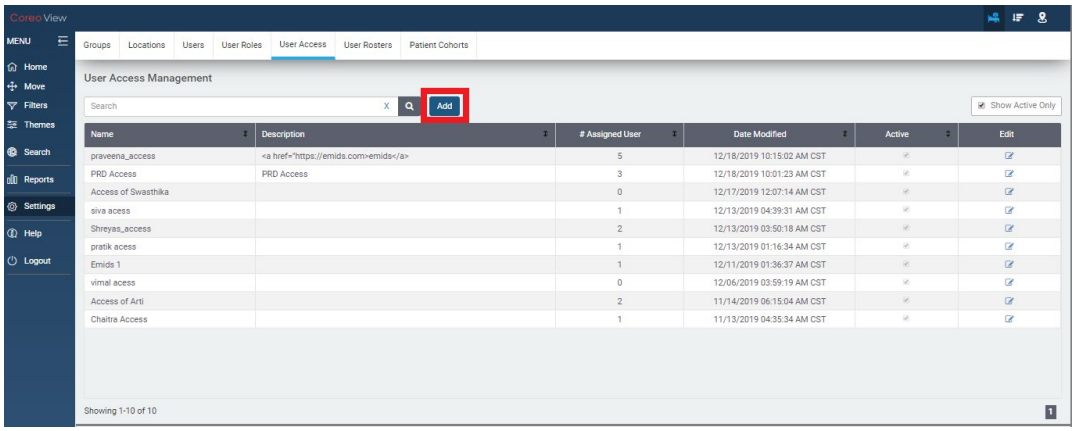


FIGURE 16. USER ACCESS MANAGEMENT TAB PAGE

3. Select the **Add** button to open the **Add User Access** tab page.

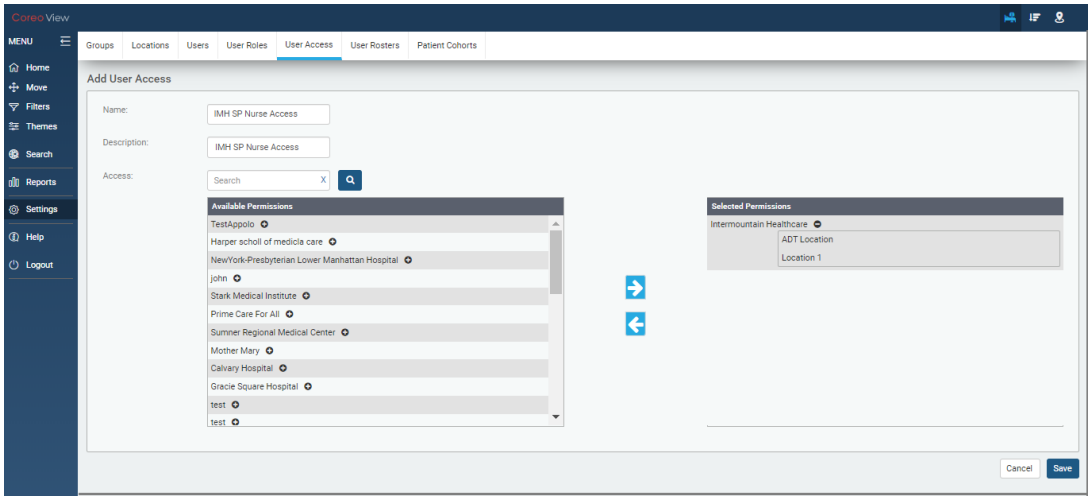


FIGURE 17. ADD USER ACCESS TAB PAGE

4. Enter the user-access name in the **Name** field.
5. Enter a description for the user-access in the **Description** field.
6. Enter the group name from the list in the **Available Permissions** box in the **Access** search box.

7. Select the search icon to search the group name. The list in the **Available Permissions** box displays based on the search keyword. However, you can also use the scroll bar in the **Available Permissions** box to search for the group names.
8. All the groups and their respective locations are displayed in the **Available Permissions** box. Select the small plus icon next to each group name to view their respective locations.
9. Select the group name(s) for which you want to give permission for user access.
10. Select the blue color right arrow button to move the group(s) to the **Selected Permissions** box to attach those groups and their respective locations for the user access.

You can select the left arrow to exclude the groups from the **Selected Permissions** box and deny the permission of the groups for the user access.

11. Click **Save** to save the user-access permissions to the newly created user role for the selected groups and their respective locations.

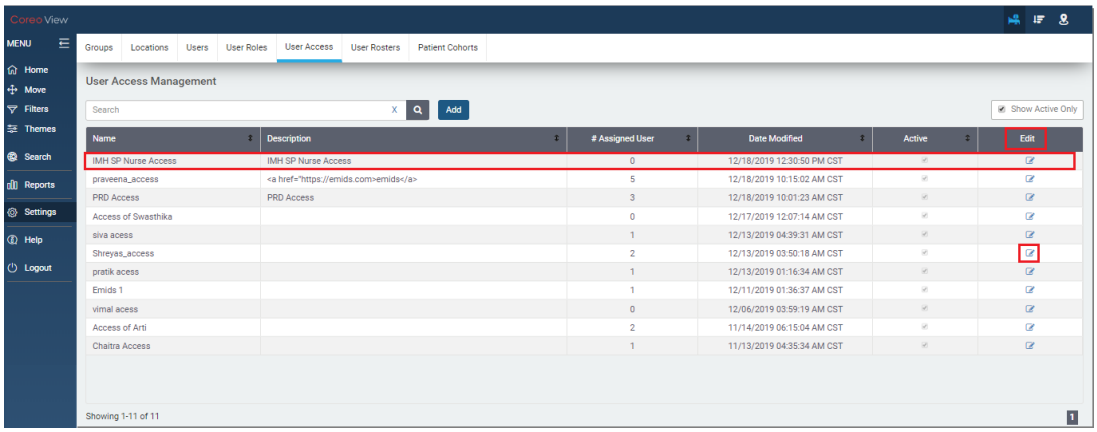


FIGURE 18. USER ACCESS MANAGEMENT TAB PAGE

12. View the newly created user-access on the **User Access Management** tab page.

You can also edit an existing user-access.

13. Select the user-access row which you want to edit and select the edit icon in the **Edit** column.
14. The **Edit User Access** tab page opens. Edit the required values like moving the groups between **Available Permissions** and **Selected Permissions**, and save the changes.

2.5 User Rosters

Follow these steps to add a new user roster:

1. If you are not already in **Settings,** select **Settings** on the side menu. The default tab page, **Group Management** page opens.
2. Select the **User Rosters** tab to open the **User Roster Management** tab page.

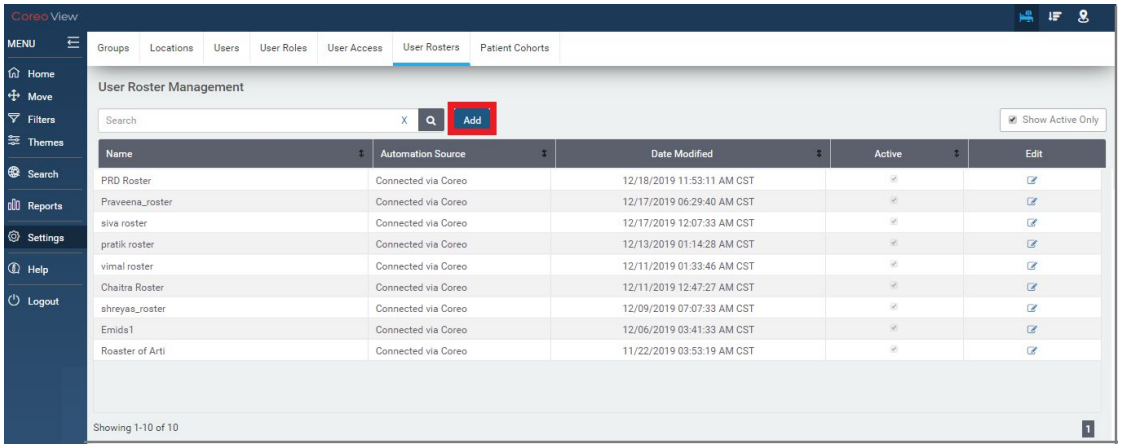


FIGURE 19. USER ROSTER MANAGEMENT TAB PAGE

3. Select the **Add** button to open the **Add User Roster** tab page.

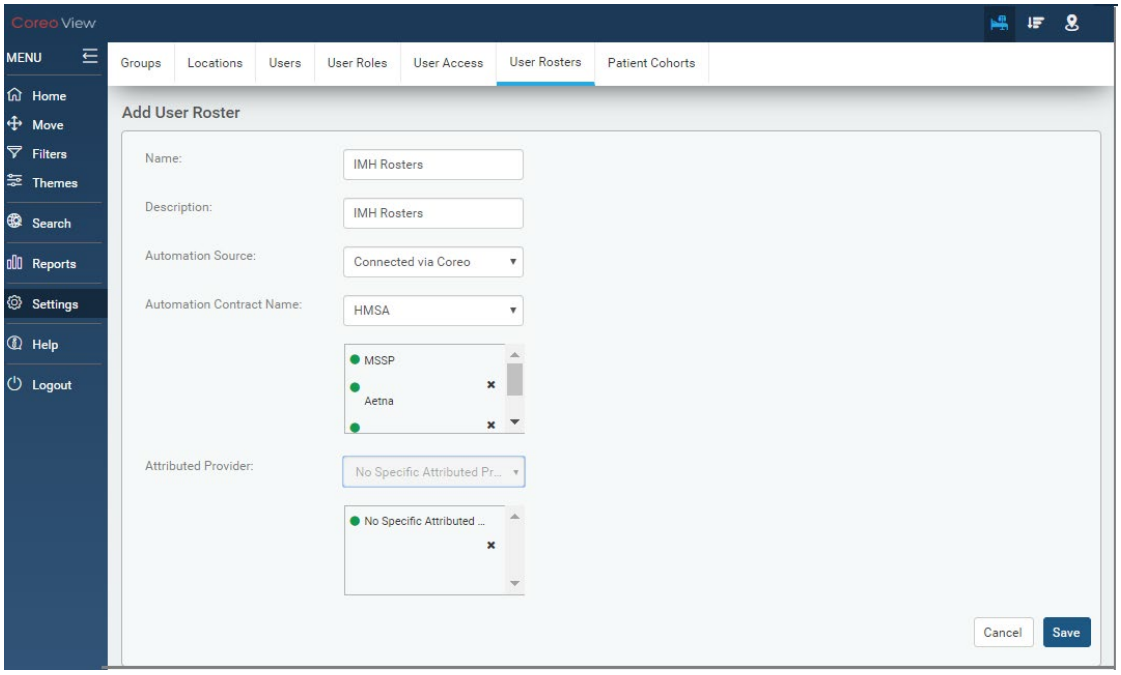


FIGURE 20. ADD USER ROSTER TAB PAGE

4. Enter the user-roster name in the **Name** field.
5. Enter a description for the user-roster in the **Description** field.

6. In the **Automation Source** field, select from the following options:

- **None**
- **Connected via Coreo**

7. On selecting the **Connected via Coreo** option, the **Automation Contract Name** box displays.
8. Select the contract names that you want to include in the user roster. The contract names are shown from the list created in Coreo Analytics. You can select one or more contracts.
9. In the **Attributed Provider** box, select the attributed provides for the user roster; Attributed providers are created in Coreo.
10. Select **Save** to save the changes and add the newly created user roster.

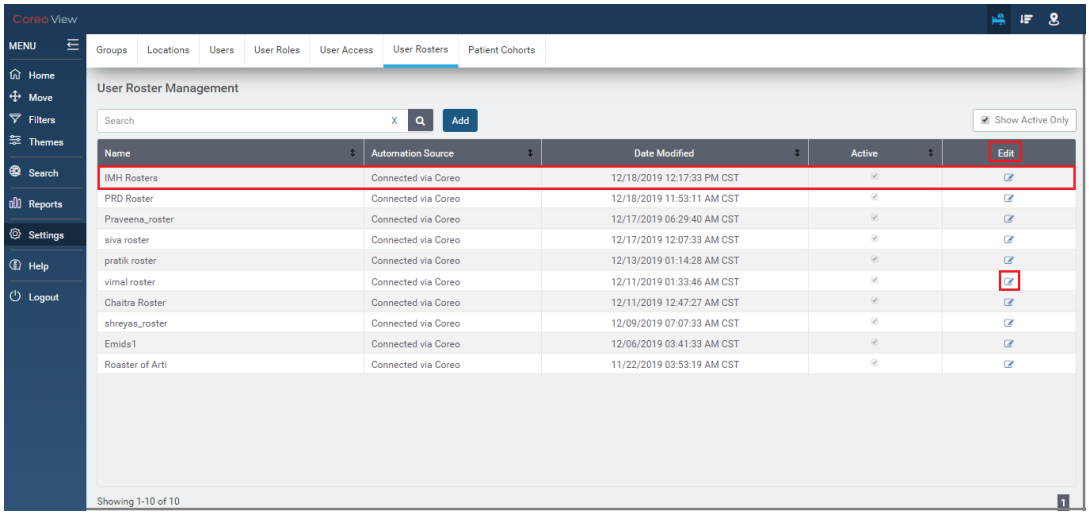


FIGURE 21. USER ROSTER MANAGEMENT TAB PAGE

11. View the newly created user roster on the **User Roster Management** tab page.

You can also edit an existing user-access.

12. Select the user roster row for which you want to edit and select the edit icon in the **Edit** column.
13. The **Edit User Roster** tab page opens. Edit the required values and save the changes.

2.6 Add Users

Follow these steps to add a new user roster:

1. If you are not already in **Settings,** select **Settings** on the side menu. The default tab page, **Group Management** page opens.
2. Select the **Users** tab to open the **User Management** tab page.

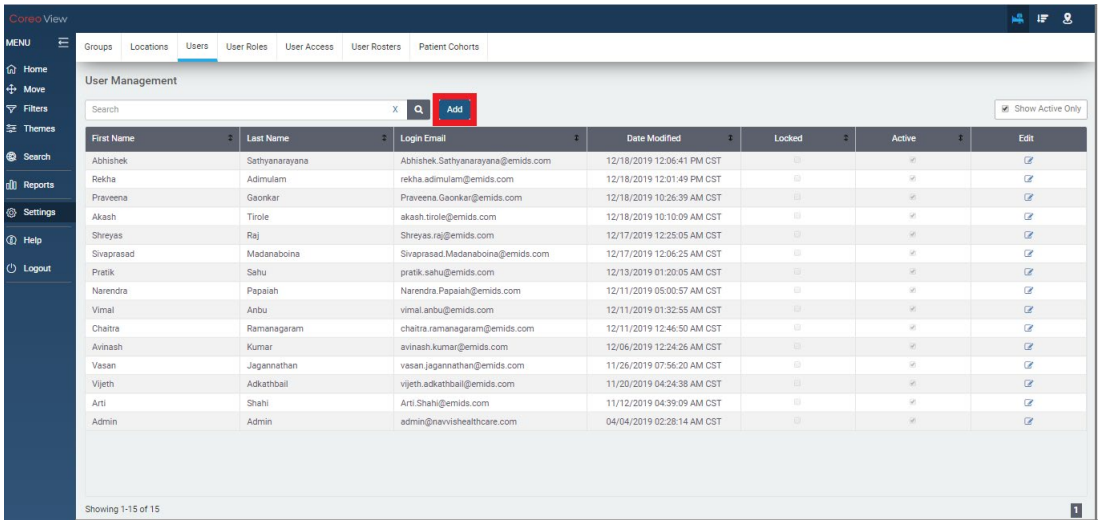


FIGURE 22. USER MANAGEMENT TAB PAGE

3. Select the **Add** button to open the **Add User Roster** tab page.

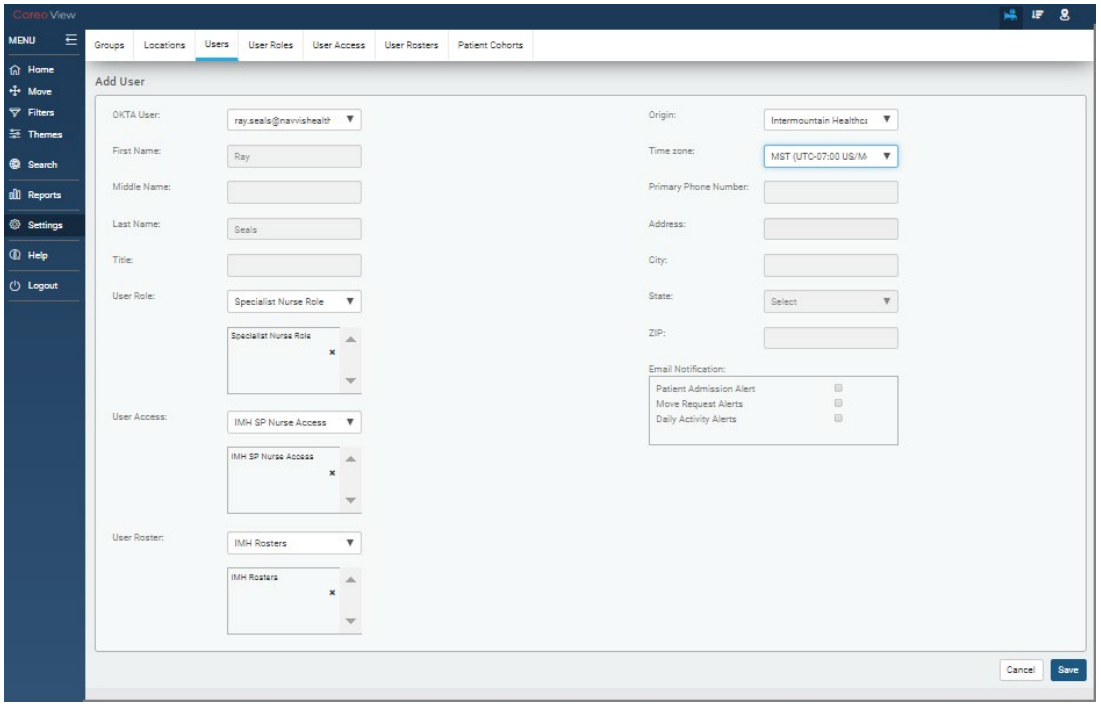


FIGURE 23. ADD USER TAB PAGE

4. In the **OKTA User** drop-down box, select the user to whom you want to assign the role, give access to groups and locations, and to assign the rosters. The drop-down list displays the users created by the Navvis administrator.

A Coreo View administrator can only add users created by Navvis administrator to the Coreo View application and assign them roles, accesses, permissions, and rosters.

The **First Name**, **Middle Name**, **Last Name** and the **Title** fields are not editable as these details flow from the Okta application.

5. Select one or more user-roles that you want to assign to the user from the **User Role** drop-down list. The list shows all the user roles that you have created on the **Add User Role** tab page.
6. Select the type of user-access that you want to assign to the user from the **User Access** drop-down list. The list shows all the user-accesses that you have created on the **Add User Access** tab page. You can select one or more user-access types.
7. Select one or more user rosters that you want to assign to the user from the **User Roster** drop-down list. The list shows all the user rosters that you have created on the **Add User Roster** tab page.
8. Select the group name to which you want to assign the user to the **Origin** drop-down list.
9. Select **Save** to save the changes that you made to add the user so that the user can access the features of Coreo View.

You have created the new group, location, user role, user access, user roster and the new user, you can view the group and location in the bed view.

10. Go to the bed view and select the **All** button on the side menu to view the newly created group and location.

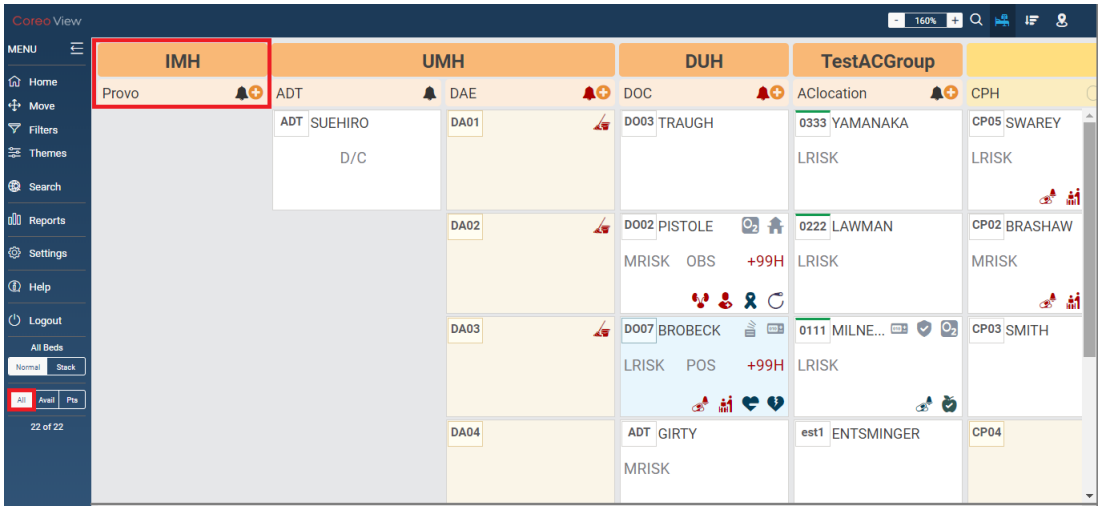


FIGURE 24. BED VIEW–NEW GROUP AND NEW LOCATION

2.7 Patient Cohorts

Follow these steps to edit an existing patient cohort. The cohort is defined in the Coreo Analytics application. Within Coreo View, the user can only edit the cohort acronym, cohort rank and its state:

1. If you are not already in **Settings,** select **Settings** on the side menu. The default tab page, **Group Management** page opens.
2. Select the **Patient Cohorts** tab to open the **Patient Cohort Management** tab page.

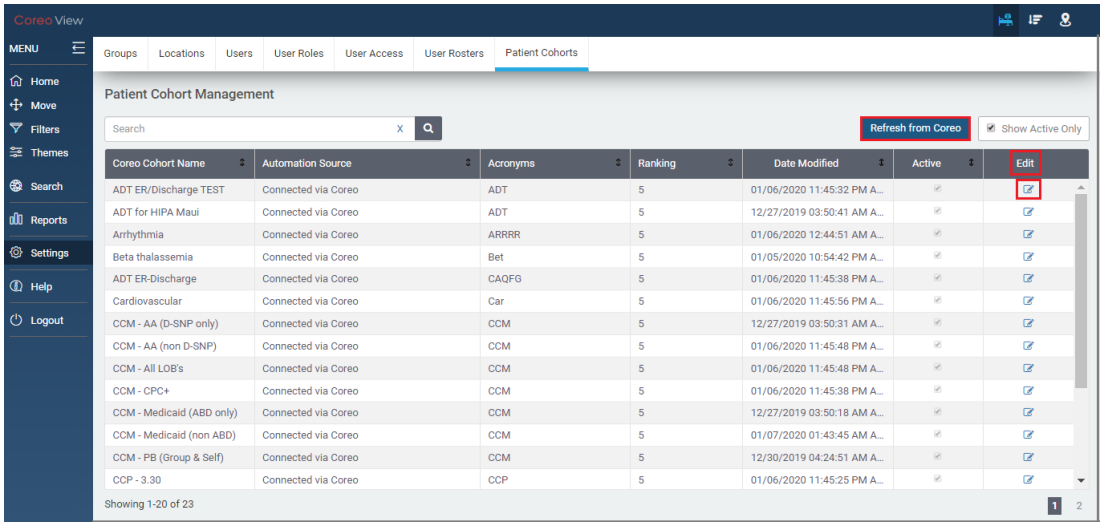


FIGURE 25. PATIENT COHORT MANAGEMENT TAB PAGE

3. Select the **Refresh from Coreo** button to keep the cohort details updated with that in the Coreo Analytics application.
4. Select a cohort for which you want to edit the acronym and then select the Edit icon.

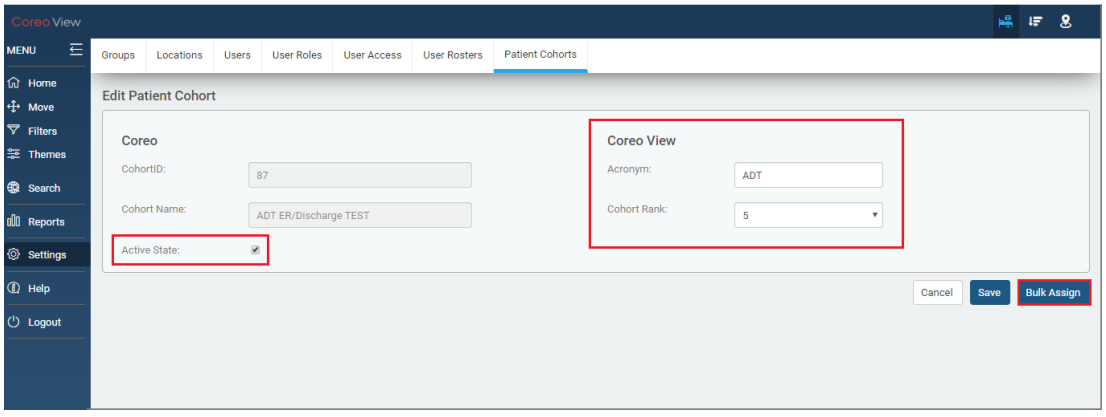


FIGURE 26. EDIT PATIENT COHORT

5. Edit the cohort acronym in the **Acronym** box, if required.

6. Edit the cohort rank if required in the **Cohort Rank** drop-down box, **1** being the highest rank and **10** the lowest.
7. Clear the **Active State** check box to change the cohort state to inactive, if required.
8. Select the **Save** button to save the changes that you made to the cohort details.
9. Select the **Bulk Assign** button to assign the patients in bulk to the bed view.

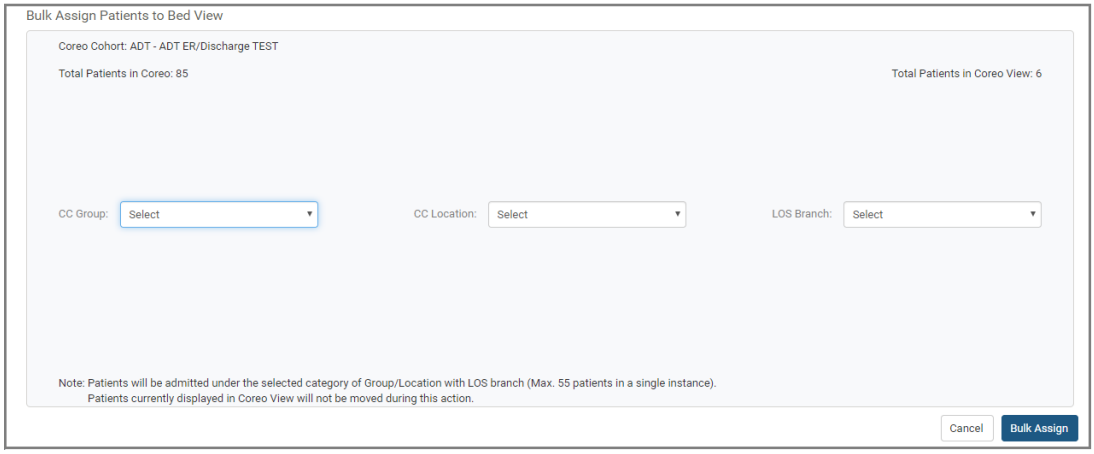


FIGURE 27. BULK ASSIGN PAGE

10. Select the CC group to which you assign the patients in bulk from Coreo in the **CC Group** drop-down box.
11. Select the location to which you want to assign the patients in the **CC Location** drop-down box. The values in this box depends upon the CC group that you select in the **CC Group** box.
12. Select the branch that you want to assign to the bulk of patient in the **LOS Branch** drop-down box.
13. Select the **Bulk Assign** button to complete the process. However, you can view the bulk-assigned patients in the bed view only after the scheduled data sync process that takes place in the Coreo View database.

2.8 ADT (Admit Discharge Transfer) Events

The Coreo View application has the provision of implementing the HL7 ADT (Admit, Discharge, Transfer) messages. ADT messages transmit patient data related to healthcare visits or patient demographics.

A trigger event such as patient admission, transfer, or discharge transmits the message such as “Patient has been admitted to Hospital A,” or “Patient has been moved from the Emergency bed to the Private bed” to the Coreo View database.

The Coreo View database can be configured to synchronize itself with the ADT message data as sent by the central administrative system.

The synchronization process is automated and runs as a background job in Coreo View, and the periodicity of data synchronization can be set as nightly sync (24 hours) or can be changed as required.

You can enable the Coreo View user interface to prepare the application to receive the synchronized ADT data when creating new groups and locations.

3 Administrative Reports

Coreo View provides the capability to authorized users to generate two class of reports:

- **Audit Logs:** The audit logs include the user login audit, patient audit log, and report audit log.
- **Automations Log:** The automation logs include logs of all automation events which include the Admit event, Discharge event, Transfer event, Patient demographic sync, Cohort sync, Contract sync, User management, Patient attribute, Extract process, Bulk admit, Emergency event and Attribute provider.

3.1 Audit Logs

Follow these steps to generate the **Audit Trail Reports**:

1. On the side menu, select **Reports** to open the **Reports** window and then select **Audit Logs** to open the **Audit Trail Reports** tab page.

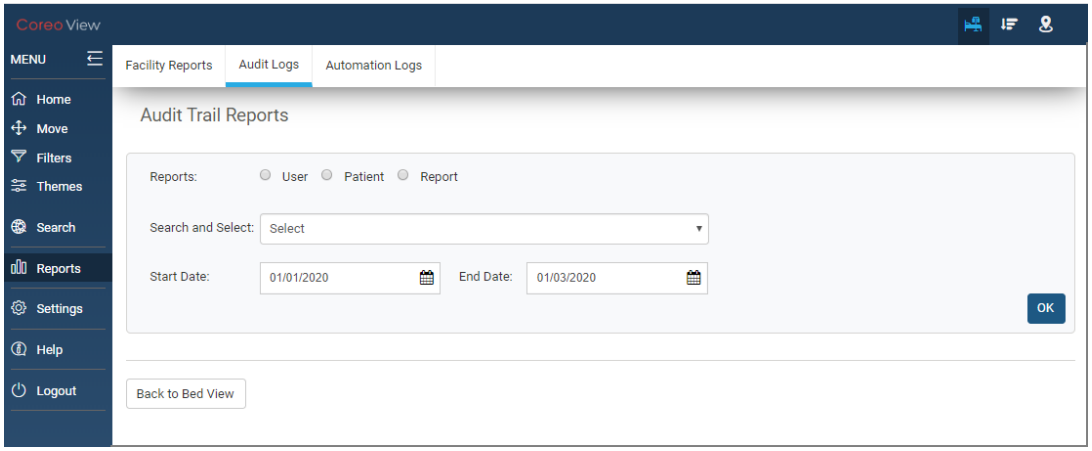


FIGURE 28. AUDIT TRAIL REPORTS TAB PAGE

2. Select the radio button to choose the report-type from the following

- **User:** Generates the user login audit log. The login audit log contains the date and time of each user login including the number of successful and failed sequential attempts to comply with HIPAA regulations.

- **Patient:** Generates the patient audit log. The patient audit log contains the date, time, and each user action (for e.g., accessing a particular bed containing PHI) to comply with HIPAA regulations.
- **Report:** Generates the report audit log. The report audit log contains the date, time, and each user action (for e.g., viewing or downloading a facility report containing PHI) to comply with HIPAA regulations.

3. In the **Search and Select** field, choose the user for whom you want to view the login audit log.
4. In the **Start Date** box, enter the starting date for the period for which you want to generate the audit log report.
5. In the **End Date** box, enter the ending date of the period for which you want to generate the audit report.
6. Select the **OK** button to generate the audit log for the selected criteria.

The details are fetched in the lower pane of the window. You can use the **Search** feature by entering the keywords to narrow down the records that you wish to view.

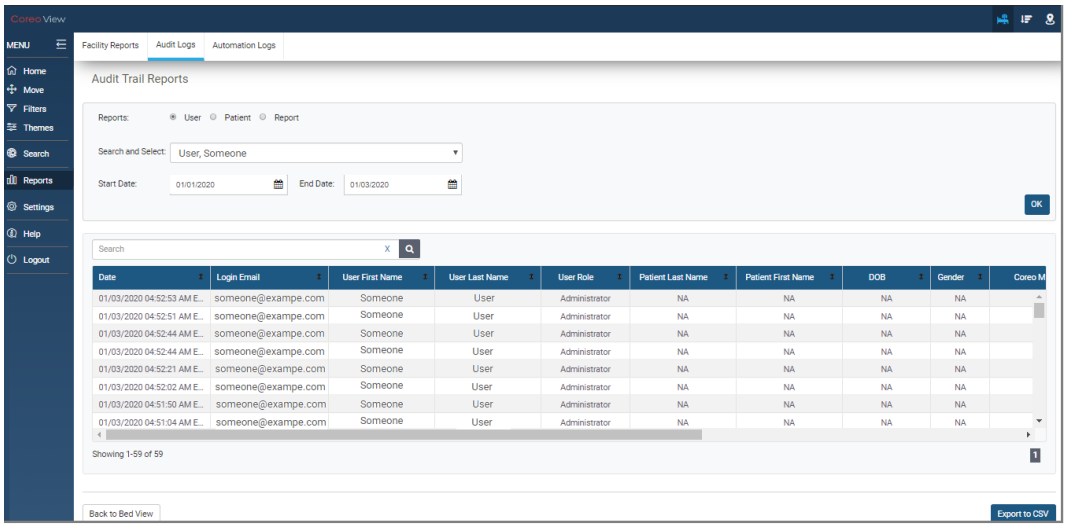


FIGURE 29. AUDIT TRAIL REPORTS–USER LOGIN AUDIT LOG

7. Select the **Export to CSV** button to save the report in a CSV file.

Coreo View exports the report details to a CSV file. The CSV file is saved with the report-type name and the period for which it is generated.

8. Similarly, to generate the patient audit log, select the **Patient** radio button for the patient for whom you want to view the audit log.
9. In the **Search and Select** field, choose the patient name.
10. Select the date range in the **Start Date** and **End Date** boxes, and click **OK** to view the patient audit log report.

11. Likewise, to generate the report audit log, select the **Report** radio button and follow the steps as explained for the other two audit log reports.

The field names are the same in all the three (**User, Patient,** and **Report**) audit log reports: **Date, Login Email, User First Name, User Last Name, User Role, Patient Last Name, Patient First Name, DOB, Gender, Coreo MPI, Action, Module,** and **Description**

However, values are displayed only in those related fields based on the type (**User**, **Patient**, and **Report**) of the audit log report. The non-related fields display the value "**NA**."

3.2 Automation Logs

Follow these steps to generate the **Automation Log** reports:

1. On the side menu, select **Reports** to open the **Reports** window and then select **Automation Logs** to open the **Automation Log** tab page.

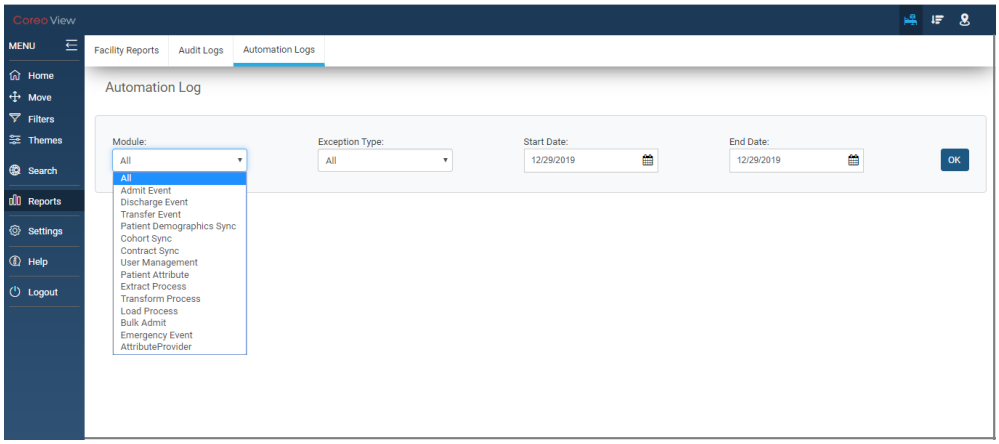


FIGURE 30. AUTOMATION LOG TAB PAGE

2. Select the option for which you want generate the automation log in the **Module** drop-down box.
3. In the **Exception Type** drop-down box, select from the following options:

- **All**
- **Successful**
- **Warning**
- **Error**
- **Sync Error**
- **Successful-Updated**
- **Warning-Updated**
- **Error-Updated**

4. In the **Start Date** box, enter the starting date for the period for which you want to generate the automation log report.
5. In the **End Date** box, enter the ending date of the period for which you want to generate the automation log report.
6. Select the **OK** button to generate the automation log for the selected criteria.

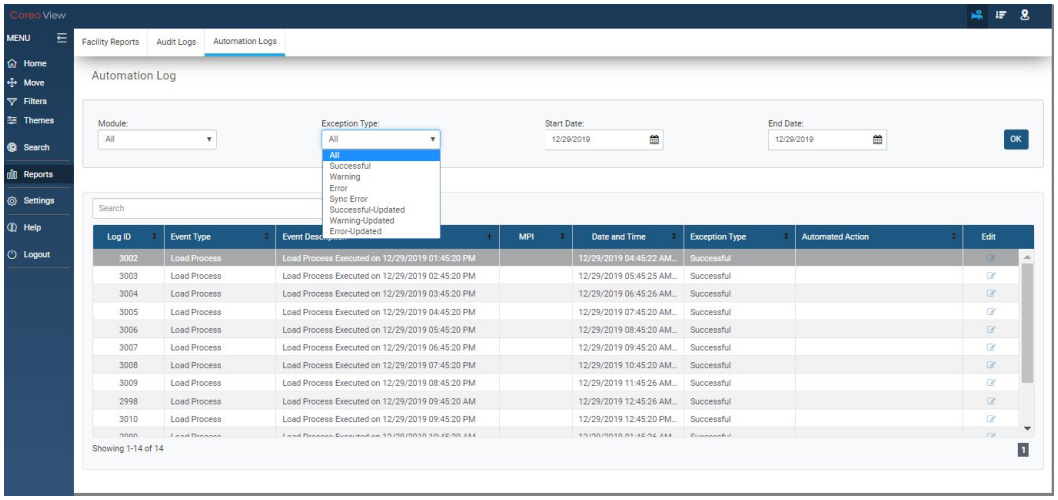


FIGURE 31. AUTOMATION LOG REPORT

The automation log report displays successful events, warnings, and errors (for example, errors due to incomplete ADT data from the automation source).

- **Log ID**: Coreo View generates a log identification number for each event.
- **Event Type**: The option that you have selected in the **Module** filed.
- **Event Description**: The description of the event that has come from the HL7 file, and includes details such as whether the event was executed successfully, or has the event execution failed, and the date and time of the event occurrence.
- **MPI**: The patient MPI, the Master Patient Index (MPI), is a unique identification number generated for each patient in Coreo.
- **Date and Time**: The Event date and time with respect to the Coreo View database
- **Exception Type**: The exception type that you have selected in the upper pane of the window
- **Automated Action**: The action performed by Coreo View during the automated process in response to the event that comes from the HL7 file.
- **Edit** button**:** For the log of **Module** type, **Admit Event**, **Discharge Event**, or **Transfer Event**, Coreo View allows the user to take corrective actions for exception types, **Warning**, and **Error**. Select the **Edit** button for the specific log to resolve the warnings or errors.

Glossary

Acute Care: Acute Care (AC) group type includes an emergency department, intensive care, coronary care, cardiology, neonatal intensive care, among others.

ADT Bed under the ADT Location: A bed cell that automatically receives the discharged patients and can be viewed under the ADT location. Coreo View creates an ADT location automatically for each new group that you create.

ADT Bed: Coreo View creates a temporary bed called an ADT bed under a location automatically when you move the patient from a bed cell to an occupied (destination) bed cell. The patient in the destination bed cell is moved to the ADT bed indicating that the patient, for example, is in a hallway and is waiting for an actual bed. Also, an ADT bed under a location is created when you admit the patient in an Emergency state.

Audit Logs: The user can print three different types of audit logs in Coreo View, the user login audit log, the patient audit log, and the report audit log.

Automations Log: The automation logs include logs of all automation events, which include the Admit event, Discharge event, Transfer event, Patient demographic sync, Cohort sync, Contract sync, User management, Patient attribute, Extract process, Bulk admit, Emergency event and Attribute provider.

Bed View (BV): The bed view layout displays the patient information based on the type of group, location, patient cohorts, patient attributes, bed attributes, bed activities, and patient move requests. The bed view is the default home layout.

Beds: Coreo View supports a list of beds for each location with user-defined bed id. (For example, 501B).

Card View: A patient record that is displayed horizontally as a row in the Prioritized View.

Column: In the bed view, organized by groups, location names are displayed in columns across the top, and the beds are provided vertically below.

Coreo Patient: The patient who is in the Coreo application, but is not assigned to any bed cell under any groups in the Coreo View application.

Coreo: The term Coreo application is used interchangeably with the Coreo Analytics application. Coreo has the master list of all patients, which can be fetched in the Coreo View application based on the customer specification.

Cross Continuum: In the Cross Continuum (CC) group type, patients are cared at their home locations and are served by home-health and outpatient services. For example, Acute Care – Group 1: Cardiac Care – Location 1, CCU – Location 2; PAC – Group 1: SNF-1 – Location 1, SNF-AX –Location 2; Cross Continuum – Group 1: Home Health – Location1, Outpatient Therapy – Location 2, Physician Office – Location 3

Filter: Filter the patient list based on hospital groups, locations, patient cohorts, insurance providers, patient disposition status, patient attributes and activities, bed attributes, and risk factors. Only the related patient records display, and the other records are cleared from the view.

Flagged patient: Flag a patient record in Coreo View when the patient in Coreo Analytics is not assigned to any bed in the bed view and yet needs to be monitored. You can also flag an existing patient who is in the bed view to mark the patient as a favorite for monitoring purposes.

Geomap View (GMV): The geomap view displays the patient details associated with the location on a geographical map.

Group type: The three different levels of care; AC, PAC, and CC.

Group: Coro View supports the creation of groups which are care facilities that can be created under three different care levels including Acute Care, PAC Network and Cross Continuum.

Locations: The different locations in which the facilities belonging to a group are located. The user can create a list of locations with user-defined names and assign them to a group.

Post-Acute Care (PAC) Network: In the PAC group type, patients are cared for with skilled nursing facilities, inpatient rehabilitation facilities, long-term acute hospital facilities, among others. PAC is also referred to as SNF (Skilled Network Facility).

Prioritized View (PV): The prioritized view displays the patient details and bed information of the AC group based on the sorting attributes that you choose.

Theme: A theme is a visual representation of locations, beds, and patients based upon a filter. A theme customizes the look of the Coreo View screen and the theme that you apply displays in all three views, bed view, prioritized view and geomap view.

UEE: The Coreo UEE allows the users to view all the applications available through the Okta single sign-on (SSO) account that the users have access to on standard screen monitors and widescreen monitors either in a single-panel mode or in a multi-panel mode.

User: The user of the Coreo View application.

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