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## Status Types

Your regional administrators set up available status types, such as:

- **Emergency Department** - current service availability in the ED
- **Bed Avail Adult ICU** - number of available ICU beds
- **Emergency OPS Plan** - facility has/has not activated its emergency operations plan
- **Fuel Capacity** - maximum amount of fuel a generator can hold
- **HazMat** - facility has hazardous materials decontamination capability
- **Ops** - resource's operational status, such as fully, limited, closed
- **Vents Owned** - number of ventilators this facility owns

**Note:** Your region has complete control over configuring its status types. Therefore, most of the status types available to you are unique to your region.

Note the following about status types:

- If the resource is not going to collect information and report on this status type on a daily basis, the type should be set up as event only.
- Administrators with the appropriate permissions can include status types (that are not event only) in your region's views.
- For a user to be able to update a resource's status, the type must be visible to that user. Refer to [Status Type Visibility](#) for details.

See the sections in this topic to learn about levels at which status types can be assigned, format types you can specify, status timers, NEDOCS labels, color coding, and much more.

## Status Types Views

Authorized administrators can view status types for one or more regions on the Status Types page. You can conduct a smart search on any component to quickly locate the correct status types or adjust the visible columns for a different look at the information available for all status types. Additionally, you can use the filter and column options to quickly review information and navigate through all status types on a single page.

Active	Name	Statuses	Data Type	Standard Type	Section	Event Only	Description	Comments
<input checked="" type="checkbox"/>	# Approved to Return		Number		Needs	<input checked="" type="checkbox"/>	Bulk Change	Optional
<input checked="" type="checkbox"/>	# Chempacks		Number		Chempack	<input checked="" type="checkbox"/>	Number of chempacks	Optional
<input checked="" type="checkbox"/>	# Dialysis Patients		Number	DIAL: Current Patient Count	Census	<input checked="" type="checkbox"/>	Number of patients current...	Optional
<input checked="" type="checkbox"/>	# Home Hemo		Number		Census	<input checked="" type="checkbox"/>	# Home hemodialysis pati...	Optional
<input checked="" type="checkbox"/>	# Isolation Patients		Number		Census	<input checked="" type="checkbox"/>	# isolation patients.	Optional
<input checked="" type="checkbox"/>	# Licensed Beds		Number		Operations	<input checked="" type="checkbox"/>	# licensed beds.	Optional
<input checked="" type="checkbox"/>	# Patients Evacuated		Number		Operations	<input checked="" type="checkbox"/>	Number of patients who w...	Optional
<input checked="" type="checkbox"/>	# PD		Number		Census	<input checked="" type="checkbox"/>	Number of PD patients.	Optional
<input checked="" type="checkbox"/>	17 and Younger		Number		Intoxication Surveillance	<input checked="" type="checkbox"/>	Number of intoxicated pati...	Disabled
<input checked="" type="checkbox"/>	18 and Older		Number		Intoxication Surveillance	<input checked="" type="checkbox"/>	Number of intoxicated pati...	Disabled
<input checked="" type="checkbox"/>	24-Hour Contact Phone		Text		Needs	<input checked="" type="checkbox"/>	Bulk Change	Optional
<input checked="" type="checkbox"/>	Admit to ICU		Number	STSD1657609024166	Patient Disposition	<input checked="" type="checkbox"/>	Number of patients admitt...	Optional

Visible columns on the page change depending on whether one or more regions are being viewed. You can click column headers to sort the page in ascending and descending order by column.

The list includes the name of each status type and its format type, such as a date, number, text, multiple option, or NEDOCS Calculation. For Multi-(option) status types, the last column shows the options currently set up for the type. The table includes the description of the type, the standard status type (if applicable), and an indication of whether the status type is available only for events.

**Note:** If a resource is not going to collect information and report on this status type on a daily basis, the type should be set up as event only.

Status types can be edited individually by clicking the name of the status type or by selecting the checkbox for more than one status type and clicking the Bulk Change button at the top.

Editing status types in bulk opens a list of the common fields for the selected status types. Selecting multiple status types of the same data type (for example, Number, Date, or Multi) offers more common fields for bulk changes. On the Bulk Change Status Types page, status types selected for bulk changes are listed at the top. These status types can still be selected or deselected for changes. Additionally, the current selection for all common fields appears, along with other options, and a checkbox to the left of each field is automatically selected when a bulk change is identified. Saving the page enacts your changes to all selected status types.

## Levels

You can assign a status type at the **resource type level**. This type is available to all resources in this level. You can also assign a status type at the **individual resource level**. This resource can report detailed information about its available personnel, services, functions, and supplies without affecting other resources in its type.

You can assign the same status types to resource and sub-resource types. Depending on your situation, you may choose to create unique status types for your sub-resources in order to clearly distinguish between those that apply to resources and types that are more appropriate to the sub-resource level.

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## Statuses and Status Reasons

When creating a new status type, the administrator specifies its type, which can be a date, number, text, or NEDOCS Calculation, or specifies that this status type offers multiple options. These options are statuses.

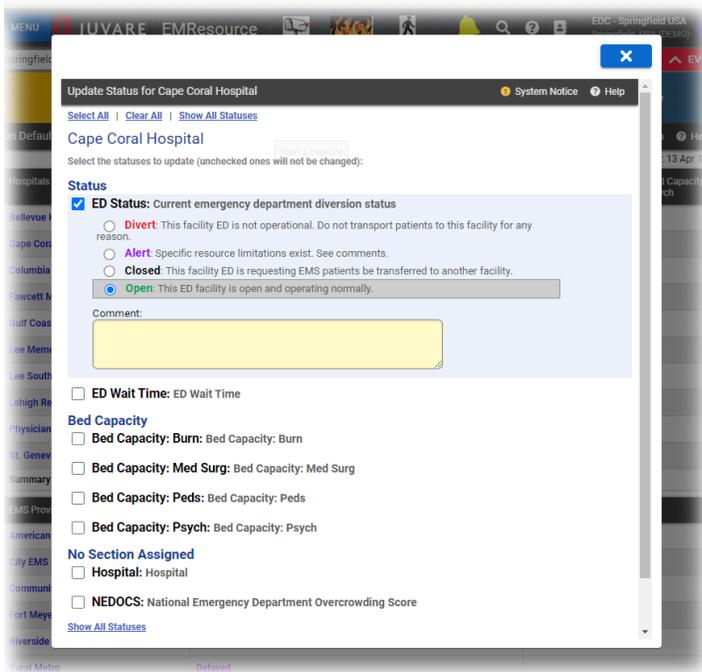
Active	Name	Color	Standard Status	Description	Comments
✓	Alert	■	Advisory	Specific resource limitations exist. See co...	Optional
✓	Closed	■	Closed	This facility ED is requesting EMS patients...	Optional
✓	Divert	■	On Divert	This facility ED is not operational. Do not t...	Optional
×	Limited-Diversion	■	Advisory	Trauma patients only	Optional
✓	Open	■	Normal	This ED facility is open and operating nor...	Optional

For example, a facility may report on its decontamination capacity status. Several users at the facility can update this status. When setting up the status type, the administrator could have made it a text field that allowed the user to enter virtually anything about the resource and its status. Instead, the administrator wanted the user to choose a status from among a predefined list of options, such as: Exceeded, Full, Inactive, and Open. In another case, the facility reports its operational status, with users choosing from the following: Fully operational, Limited operation, and Closed.

When setting up a status, the administrator can specify that an associated comment is disabled, optional, or mandatory. When a comment is mandatory, the user who is updating the resource's status and chooses that particular status must enter a comment about the change. When disabled, the comment field does not appear to the user.

### Updating the Resource's Status

A status can include a set of reasons from which the user can (or must) choose. That is, if the user changes a resource's status to a particular option, the page displays the associated set of reasons (if any).



The user is updating the resource's **Emergency Dept.** and chose the **Closed** status. In this case, the user must indicate at least one reason (checkboxes) for selecting this status. You can associate status reasons with a Multi (multiple choice) status type or a single status (within the multiple choice type).

**Note:** For each reason, you can indicate whether it should be included in the Comments section on *View* pages.

## Status Reasons

If you are authorized to do so, you can view and manage your region's status reasons from the *Status Reasons* page. Once created, you and other authorized users can associate the reasons to any number of status types or statuses, as appropriate.

Name	Abbreviation	Definition
CT Down	CT Down	The CT scanner is out of service.
ED at Capacity	ED@Cap	The emergency department is currently at capacity.
Fire Alarm System	FireAlarm	The facility's fire alarm system is compromised.
Flooding	Flooding	
No General Surgery	No Surg	No surgeon available.
OR Fire	ORF	
Other (indicate in comments)	Other	
Potable Water	Water	The facility's potable water supply is compromised.
Power Plant	PowerPlant	The facility's power plant operations is compromised.
Security	Security	The facility's security operations is compromised.
Sewage backup		Sewers backed up
Telephone	Phone	The facility's telephone operations is compromised.

This table shows the status reason's name, abbreviation, and definition.

**Tip:** Abbreviations may be used in text notifications and reports.



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## Create a Status

Authorized users can create and maintain statuses for **Multi(-option)** status types.

Note the following about status creation:

- If you just created a new **Multi** status type, the system automatically takes you to the Status List for (status type) page so that you can create statuses for the type. In this case, start at step 3 in this procedure.
- You must have more than one status set up to see any options in the auto change status to field.
- The **Is a reason required** and **Status Reasons** options are available only for status types for which status reasons have been made available.

### To create a status

1. In the main menu, click **Setup** and then click **Status Types**. The *Status Types* page opens.
2. Locate the status type and, on that row, click **statuses**. The *Statuses for (status type)* page opens.
3. Click **Create New Status**. The *Create Status* page opens.
4. Enter this information.

Field	Description
<b>Name</b>	Name of status
<b>Color</b>	Select the color of the status's font.
<b>Description</b>	Enter a description for the status.
<b>Active</b>	Select to make this status active and clear to make it inactive.
<b>Status Update Frequency</b>	Indicate whether the status should be updated whenever the status is changed or set an expiration time frame for the status.
<b>Upon expiration, auto change status to</b>	Select the status to change to automatically when the status expires.

Field	Description
	<p><b>Tip:</b> One of two things happens when a status expires: the system prompts the users who are required to update this status or the system automatically makes the status change you specify here.</p>
Auto change status comment to	Enter the comment that is supplied when the system is set to change the status automatically upon expiration.
Timer Type	Select the type of timer that is used when a status is set to expire or indicate no timer.
Reset Timer	Select the situation that resets the timer: when the status changes or on all updates.
Is a reason required?	Specify whether the user must select a reason for the status change.
Status Reasons	Select the reasons to make available for this status.
When updating status, comments are	<p>Indicate whether comments are:</p> <ul style="list-style-type: none"> <li>◦ <b>Disabled</b> - The comment field does not appear to the user for this status.</li> <li>◦ <b>Optional</b> - The user can enter a comment when choosing this status, but is not required to.</li> <li>◦ <b>Mandatory</b> - The user must enter a comment when they select this status.</li> </ul>

5. Click **Save**.

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## Create a Status Reason

Depending on your role, you may be able to create and maintain status reasons. Status types and statuses can include a set of reasons from which the user can (or must) choose.

### To create a status reason

1. In the main menu, click **Setup** and then click **Status Reasons**. The *Status Reasons* page opens.
2. Click **Create Status Reason**. The *Create Status Reason* page opens.
3. In **Name**, enter the name of the reason.
4. In **Definition**, enter the definition.
5. In **Abbreviation**, enter an abbreviation.

**Tip:** Abbreviations may be used in text [notifications](#) and reports.

6. Do one of the following:
  - Select the **Options** checkbox to include the reason in the status comment.
  - Clear the **Options** checkbox to exclude the reason from the comment.
7. Click **Save**.

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## Create a Status Type

Authorized users create and maintain status types. This includes indicating the format of the type, such as a date, number, or text. You can also set up a status type to provide multiple options from which the user can choose.

### Notes:

- The **Type** column in the settings table indicates the types for which this attribute is appropriate.
- Calculated status types cannot be manually updated. Instead, calculated status types are automatically recalculated in real time when any of the component status types are updated.
- Calculated status types do not expire or have reset settings.

### To create a status type

1. In the main menu, click **Setup** and then click **Status Types**. The *Status Types* page opens.
2. Click **Create New Status Type**. The *Create Status Type* page opens.
3. Select the type (**Data Type**).
  - Number
  - Multi (multiple options)
  - Text
  - NEDOCS Calculation
  - Date
  - Calculated
4. Under **Regions**, select what other Regions this new Status Type should also be created in (if applicable per your user setup).
5. Click **Next**. The *Create Status Type* page opens.
6. Specify the settings for this status type.

Setting	Description	Type
<b>Name</b>	Name of the status type (required)	All
<b>Description</b>	Description of the status type	All
<b>Formula</b>	<p>Equation that identifies the components and component relationships of calculated status types. (required)</p> <ol style="list-style-type: none"> <li>Click <b>Formula Options</b>. A window opens.</li> <li>In the search field, type the name of a status or standard status type. A list of types appears.</li> <li>Locate the type and, on that Formula column, click the <b>copy to clipboard</b> icon . The type appears in the formula with its identification and the initial value. For example, st(12238,0).</li> <li>In the equation, type the arithmetic function of plus (+), minus (-), multiplication (*), or division (/) that you want to use to join the component types. <b>Note:</b> If you use division to simulate a percentage, you need to multiply the first status type by 100. For example, (st(116136,0)*100)/st(116246,0).</li> <li>Repeat steps 3 – 5 to complete the equation. For example, st(12238, 0)+st(12228, 0)+st(13345, 0).</li> <li>Click <b>Validate</b>. If written correctly, the components are identified below.</li> </ol>	Calculated
<b>Active</b>	When selected, indicates this status type is active and available for use; default value is selected active	All
<b>Event Only</b>	<p>When selected, the type is available for events only</p> <p><b>Note:</b> If a resource is not going to collect information and report on this status type on a</p>	All

Setting	Description	Type
	daily basis, set it up as event only by selecting this checkbox.	
<b>Status Type Visibility</b>	Indicates the type is potentially visible to users in other regions, is visible to this region's users based on the user's role, or is private; if you make it visible to users in other regions, all roles automatically have view rights and you cannot change these settings	All
<b>Section</b>	Indicates the status type section in which this type appears within the resource's details page (required); a status type can appear in only one section	All
<b>Resource Detail View</b>	Select to show this status type in the resource's details view	All
<b>When updating the status, comments are</b>	Optional, mandatory, or unavailable when updating the status	Number, Text, NEDOCS Calculation, Date
<b>Reset Value</b>	Upon expiration, the system resets the status type or retains the value	Number, Text, NEDOCS Calculation, Date
<b>Reset Comment</b>	System resets the status comment at each update or retains the comment between updates	All
<b>Exempt from Must Update</b>	User is not required to update this status, even when the user has the <i>Status - User must update overdue status</i> right	All

Setting	Description	Type
User must update status daily for	Status expires at the indicated time(s) on a daily basis (24-hour format)	All
Status Update Frequency	Status expires whenever the status changes or at the indicated interval (days / hours / minutes)	Number, Text, NEDOCS Calculation, Date
Update Grace Period	Period of time considered to be out of the expiration range (minutes); required, default value is zero)	All
Status Reason	Reasons from which the user can or must choose when changing this status	Multi
Timer Type	Enables the display of a counter (down or up) to status expiration in the application window	All
Reset Timer	System resets the expiration timer when the status changes or when there is an update to the status	Number, Text, Date
Required	When selected, a blank value is not allowed for this status	Text, Date
Valid values for this status type	Any entered value is accepted or indicate the valid value range	Number, Date
Display Summary Totals	When selected, a <b>Summary</b> row appears in views at the bottom of the associated resource type section. A total is shown in this row for all status types with the type Number for which this setting has been enabled. Other status types and other Number status types that do not have this setting enabled show <b>N/A</b> in the <b>Summary</b> row.	Number

Setting	Description	Type
<b>Color Status</b>	Color codes the value based on where it falls in the specified ranges	Number, NEDOCS Calculation, Calculated
<b>Display NEDOCS labels</b>	When selected, displays the predefined descriptive label next to the calculated score in the Update Status page, regional views, and maps; clearing this checkbox removes all labels from the view	NEDOCS Calculation

7. Select the roles that have view rights to this status type (**Roles with view rights**).

**Tip:** If you made the status type visible to users in other regions (*Status Type Visibility*), all roles in Roles with view rights are automatically selected and you cannot change these settings.

8. Select the roles that have update rights for this status type (**Roles with update rights**).

9. Select one or more **Resource Types**.

10. Click **Save**. The *Status Types* page re-opens showing your new status type, or if you are creating a new **Multi** status, the *Statuses for (status type)* page opens so that you can create the associated statuses.

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## Status Type Format

A status type's format defines the information that the type addresses or is intended to communicate. You can set up a status type with one of the following formats:

Name	Description	Examples
<b>Date</b>	Date	<p>Date a survey was completed.</p> <p>Date of the most recent disaster exercise.</p> <p>Date of a Hospital Preparedness Program (HPP) site visit.</p>
<b>Multi</b>	Multiple choice; each option is a status	<p>ED Status: Open, Closed, Open with limitations</p> <p>ED Wait Time: Green, Red, Yellow</p> <p>Neurosurgeon Available: No, Yes</p>
<b>Number</b>	Status communicated via a number	<p>Number of ICU beds available.</p> <p>Number of doses available for a medication.</p>
<b>Text</b>	Textual response	<p>Name of the infection control officer.</p> <p>Facility's area code.</p>

Name	Description	Examples
<b>NEDOCS Calculation</b>	Computed value based on variables the user enters, including number of patients awaiting ICU beds and acuity of current patients	-
<b>Calculated</b>	Computed value defined by an equation that uses existing numeric status types as variables	Total ICU Beds = ICU Beds + PICU Beds + NICU Beds

## Number

For a Number status type, you have the option to include a summary total row in Views that include the status type. When configuring the status type, select the **Display Summary Totals** checkbox to enable this feature.

Only users affiliated with specific resources may view or edit

Section \*

MCI Bed Availability

Show in Resource Detail View

Display Summary Totals 

Color Status

Comments: Type 1

When enabled, the **Summary** row appears in the appropriate Views, and in Resource Type sections that contain at least one Number status type. The total for that status type appears at the bottom of the list of values.

Hospitals	ED Status	NEDOCS	ED Wait Time	Hospital
Alpha Hospital	Alert	173	54	Normal
Baptist Hospital	Open	63	13	Normal
Blake Medical Center	Alert	63	16	Normal
Bravo Hospital	Open	--	--	Normal
Charlie Hospital	Open	--	1	Normal
Columbia Hospital	Open	22	15	Normal
Fawcett Memorial Hospital	Open	102	16	Nearing Capacity
Gulf Coast Hospital	Alert	53	12	Evacuated
Juvenile Hospital	Open	15	24	Normal
Lee Memorial Hospital	Alert	109	5	Normal
Lee South	Divert	27	15	Normal
Lehigh Regional Medical Center	Open	159	19	Nearing Capacity
Manatee Memorial	Alert	459	14	Full
Physicians Regional Med Cntr	Divert	19	8	Normal
St. Catherine	Divert	727	21	Full
Summary	N/A	N/A	236	N/A

For status types that are not the Number format, the summary row shows **N/A**.

## Calculated Status Types

Calculated status types are values that are derived from an arithmetic equation of existing status and standard status types. For example, total ICU beds is a calculated status type that is derived as the sum of adult ICU beds, PICU beds, and NICU beds.

The configuration of calculated status types differs from other status types in the following ways:

- Calculated status types cannot be manually updated. Instead, calculated status types are automatically recalculated in real time when any of the component status types are updated
- Calculated status types do not expire or have reset settings.

## Status Timer

If you select **Multi** as the status type's format, set up one or more statuses; these are the options from which the user chooses when they update this status type. You can set up a timer for any status. This timer can count up or down to an expiration threshold or simply record the time that has passed since the status was changed.

In most cases where you use a timer you will also indicate an expiration interval in the **Status Update Frequency** field. You can also specify that, upon expiration, the system automatically changes to another status (**Upon expiration, auto change status to**) and, potentially, resets the associated comment.

You can choose from the following options:

- **No Timer** - there is no timer for this status
- **Count down to expiration, then stop counting** - starts at the upper end of the interval and counts down to zero

- **Count down to expiration, then count up** - starts at the upper end of the interval and counts down to zero; upon reaching zero, it starts counting up
- **Count up to expiration, then stop counting** - starts at zero and counts up until the expiration threshold is reached
- **Count up to expiration, then start counting up again from zero** - Starts at zero and counts up; upon reaching expiration, the counter starts over from zero
- **Count up (regardless of expiration)** - shows how long the resource has been on this status regardless of when it expires

If you set a timer for the status, you may also want to indicate when the timer is reset (**Reset Timer**).

## Color Coding

When you color code a status type, its values appear in the indicated color on the appropriate View pages. For a status type that is a number, you can color code the value based on where it falls in specified ranges. In the following example, a NEDOCS Calculation appears in purple when your ED is overcrowded and green for normal operations or when slightly busy.

Hospitals	ED Status	NEDOCS	ED Wait Time	Hospital
Alpha Hospital	Alert	173 - Severe	54	Normal
Baptist Hospital	Open	63 - Busy	13	Normal
Blake Medical Center	Alert	63 - Busy	16	Normal
Bravo Hospital	Open	--	--	Normal
Charlie Hospital	Open	--	1	Normal
Columbia Hospital	Open	22 - Normal	15	Normal
Fawcett Memorial Hospital	Open	102 - Overcrowded	16	Nearing Capacity
Gulf Coast Hospital	Alert	53 - Busy	12	Evacuated

When you create or edit a number or NEDOCS Calculation status type, you can specify color coding. In the following example, the administrator has specified the ranges and the color for each.

Color Status

Color Status Range Values

Color *	Max Value for Color
Green	20
Blue	60
Yellow	100
Purple	140
Red	180
Black	

Based on the example above, if the calculated NEDOCS is 62, the number appears in yellow on View pages.

## NEDOCS Labels

If your organization reports NEDOCS, the status value shows both the calculated score and an associated descriptive label. Your organization has the option to turn off the display of these default labels.

Status Update Frequency

Whenever the status changes

Expires after specified time

Update Grace Period Minutes \*

60

Timer Type

No Timer

Display default NEDOCS labels

[View Roles](#)

When turned off, the labels do not appear in EMResource views, maps, or associated *Update Status* pages.

Hospitals	ED Status	NEDOCS
Alpha Hospital	Alert	173 - Severe
Baptist Hospital	Open	63 - Busy
Blake Medical Center	Alert	63 - Busy
Bravo Hospital	Open	--
Charlie Hospital	Open	--

## Dashes

If the status for a resource contains dashes (--) it may have expired and may need to be updated. Place the cursor over the status; a pop-up window opens showing the date and time of the last update and indicates whether it is overdue.

## User Preferences

[Users can specify preferences](#) for receiving notifications about changes to specific resource's statuses. Notification preferences can be set for any type of status type, such as number, text, multi-option, and NEDOCS Calculation. Users specify how they are to receive these notifications--by email, text pager, and/or Web (EMResource). [Administrators](#) can also specify these preferences for users they manage.



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## Status Type Fields and Options

The following table lists and describes status type fields, and indicates the format types for which each is applicable:

Setting	Description	Type
<b>Name</b>	Name of the status type (required)	All
<b>Standard Status Type</b>	Standard language for this status type, such as types based on HAvBED categories or related to a specific service, such as dialysis (read only)	Number, Multi, Text
<b>Description</b>	Description of the status type (required)	All
<b>Active</b>	When selected, indicates this status type is active and available for use; default value is selected (active)	All
<b>Event Only</b>	When selected, the type is available for events only  <b>Note:</b> If a resource is not going to collect information and report on this status type on a daily basis, set it up as event only by selecting this checkbox.	All
<b>Status Type Visibility</b>	Indicates the type is potentially visible to users in other regions, is visible to this region's users based on the user's role, or is private; if you make it visible to users in other regions, all roles automatically have view rights and you cannot change these settings	All
<b>Section</b>	Indicates the status type section in which this type appears within the resource's details page (required); a status type can appear in only one section	All

Setting	Description	Type
<b>Resource Detail View</b>	Select to show this status type in the resource's details view	All
<b>Color Status</b>	Color codes the value based on where it falls in the specified ranges	Number, NEDOCS Calculation
<b>When updating the status, comments are</b>	Optional, mandatory, or unavailable when updating the status	Number, Text, NEDOCS Calculation, Date
<b>Initial Value</b>	Default value of a status type, which is retained until the status type is updated.	All
<b>Reset Value</b>	Upon expiration, the system resets the status type or retains the value	Number, Text, NEDOCS Calculation, Date
<b>Reset Comment</b>	System resets the status comment at each update or retains the comment between updates	All
<b>Exempt from Must Update</b>	User is not required to update this status, even when the user has the <i>Status - User must update overdue status</i> right	All
<b>User must update status daily for</b>	Status expires at the indicated time(s) on a daily basis (24-hour format)	All
<b>Status Update Frequency</b>	Status expires whenever the status changes or at the indicated interval (days / hours / minutes)	Number, Text, NEDOCS Calculation, Date
<b>Update Grace</b>	Period of time considered to be out of the expiration	All

Setting	Description	Type
Period	range (minutes); required, default value is zero)	
Status Reason	Reasons from which the user can or must choose when changing this status	Multi
Timer Type	Enables the display of a counter (down or up) to status expiration in the application window	All
Reset Timer	System resets the expiration timer when the status changes or when there is an update to the status	Number, Text, Date
Required	When selected, a blank value is not allowed for this status	Text, Date
Valid values for this status type	Any entered value is accepted or indicate the valid value range	Number, Date
Display Summary Totals	When selected, a <b>Summary</b> row appears in views at the bottom of the associated resource type section. A total is shown in this row for all status types with the type Number for which this setting has been enabled. Other status types and other Number status types that do not have this setting enabled show <b>N/A</b> in the <b>Summary</b> row.	Number
Display NEDOCS labels	When selected, displays the predefined descriptive label next to the calculated score in the Update Status page, regional views, and maps; clearing this checkbox removes all labels from the view	NEDOCS Calculation
Roles with view rights	Selected roles can view the status type	All
Roles with update rights	Selected roles can update the status type	All

Setting	Description	Type
Resource Types	Selected types are associated with this status type	All

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## De-activate or Re-activate a Status

You can remove a status from a multiple option status type by de-activating it. You can also re-activate one that has been de-activated.

### To de-activate or re-activate a status

1. In the main menu, click **Setup** and then click **Status Types**. The *Status Types* page opens.
2. Locate the status type and, on that row, click the **(status type) name**. The *View Status Type: (status type)* page opens.
3. In *View Status Type: (status type)*, click **Edit**. The *Edit Status Type: (status type)* page opens.
4. Click the **Edit** link for the status. The *Edit Status* page opens.
5. Do one of the following:
  - To de-activate it, clear the **Active** checkbox.
  - To re-activate it, select the **Active** checkbox.
6. Click **Save**.

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## Edit a Status

Authorized users create and maintain statuses for **Multi** (option) status types.

**Note:** You cannot change the name of the status. For more information, contact Juvare.

### To edit a status

1. In the main menu, click **Setup** and then click **Status Types**. The *Status Types* page opens.
2. Locate the status type and, on that row, click **Statuses**. The *Statuses for (status type)* page opens.
3. In *Statuses for (status type)*, click the **status name**. The *View Status: (statuses name)* page opens.
4. Click **Edit**.
5. Modify the necessary fields.

Setting	Description	Type
<b>Name</b>	Name of the status type (required)	All
<b>Standard Status Type</b>	Standard language for this status type, such as types based on HAVBED categories or related to a specific service, such as dialysis (read only)	Number, Multi, Text
<b>Description</b>	Description of the status type (required)	All
<b>Active</b>	When selected, indicates this status type is active and available for use; default value is selected (active)	All
<b>Event Only</b>	When selected, the type is available for events only  <b>Note:</b> If a resource is not going to collect information and report on this status type on a daily basis, set it up as event only by selecting this checkbox.	All

Setting	Description	Type
<b>Status Type Visibility</b>	Indicates the type is potentially visible to users in other regions, is visible to this region's users based on the user's role, or is private; if you make it visible to users in other regions, all roles automatically have view rights and you cannot change these settings	All
<b>Section</b>	Indicates the status type section in which this type appears within the resource's details page (required); a status type can appear in only one section	All
<b>Resource Detail View</b>	Select to show this status type in the resource's details view	All
<b>When updating the status, comments are</b>	Optional, mandatory, or unavailable when updating the status	Number, Text, NEDOCS Calculation, Date
<b>Reset Value</b>	Upon expiration, the system resets the status type or retains the value	Number, Text, NEDOCS Calculation, Date
<b>Reset Comment</b>	System resets the status comment at each update or retains the comment between updates	All
<b>Exempt from Must Update</b>	User is not required to update this status, even when the user has the <i>Status - User must update overdue status</i> right	All
<b>User must update status daily for</b>	Status expires at the indicated time(s) on a daily basis (24-hour format)	All

Setting	Description	Type
Status Update Frequency	Status expires whenever the status changes or at the indicated interval (days / hours / minutes)	Number, Text, NEDOCS Calculation, Date
Update Grace Period	Period of time considered to be out of the expiration range (minutes); required, default value is zero)	All
Status Reason	Reasons from which the user can or must choose when changing this status	Multi
Timer Type	Enables the display of a counter (down or up) to status expiration in the application window	All
Reset Timer	System resets the expiration timer when the status changes or when there is an update to the status	Number, Text, Date
Required	When selected, a blank value is not allowed for this status	Text, Date
Valid values for this status type	Any entered value is accepted or indicate the valid value range	Number, Date
Display Summary Totals	When selected, a <b>Summary</b> row appears in views at the bottom of the associated resource type section. A total is shown in this row for all status types with the type Number for which this setting has been enabled. Other status types and other Number status types that do not have this setting enabled show <b>N/A</b> in the <b>Summary</b> row.	Number

Setting	Description	Type
Color Status	Color codes the value based on where it falls in the specified ranges	Number, NEDOCS Calculation, Calculated
Display NEDOCS labels	When selected, displays the predefined descriptive label next to the calculated score in the Update Status page, regional views, and maps; clearing this checkbox removes all labels from the view	NEDOCS Calculation

6. Click **Save**.

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## Edit a Status Reason

Depending on your role, you may be able to maintain status reasons. Status types and statuses can include a set of reasons from which the user can (or must) choose.

### To edit a status reason

1. In the main menu, click **Setup** and then click **Status Reasons**. The *Status Reasons* page opens.
2. Locate the status reason and, on that row, click the **(status reason) name**. The *View Status Reason: (status reason)* page opens.
3. In *View Status Reason: (status reason)*, click **Edit**. The *Edit Status Reason: (status reason)* page opens.
4. Make your changes.

**Tip:** Abbreviations may be used in text [notifications](#) and reports.

5. Do one of the following:
  - Select the **Options** checkbox to include the reason in the status comment.
  - Clear the **Options** checkbox to exclude the reason from the comment.
6. Click **Save**.

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## Edit a Status Type

With the appropriate permissions, you can create and maintain status types. Status types can be edited individually or in bulk. Editing status types in bulk opens a list of the common fields for the selected status types. Selecting multiple status types of the same data type (for example, Number, Date, or Multi) offers more common fields for bulk changes. On the Bulk Change Status Types page, status types selected for bulk changes are listed at the top. These status types can still be selected or deselected for changes. Additionally, the current selection for all common fields appears, along with other options, and a checkbox to the left of each field is automatically selected when a bulk change is identified. Saving the page enacts your changes to all selected status types.

**Note:** The **Type** column in the settings table indicates the types for which this attribute is appropriate.

### To edit one or more status types

1. In the main menu, click **Setup** and then click **Status Types**. The *Status Types* page opens.
2. Take one of these actions.

If you want to...	Then...
Edit one status type,	On the status type row, click the <b>(status type) name</b> . The <i>View Status Type: (status type)</i> page opens.
Edit more than one status type,	<ol style="list-style-type: none"> <li>a. On the left of that row, select the checkbox for all status types you want to edit.</li> <li>b. At the top, click <b>Bulk Change</b>. The <i>Bulk Change Status Types</i> page opens.</li> </ol>

3. Specify the settings for the status types, as outlined in the following table.

Setting	Description	Type
<b>Name</b>	Name of the status type (required)	All
<b>Standard Status Type</b>	Standard language for this status type, such as types related to a	Number, Multi, Text

Setting	Description	Type
	specific service, such as dialysis (read only)	
<b>Description</b>	Description of the status type (required)	All
<b>Active</b>	When selected, indicates this status type is active and available for use; default value is selected active	All
<b>Event Only</b>	When selected, the type is available for events only  <b>Note:</b> If a resource is not going to collect information and report on this status type on a daily basis, set it up as event only by selecting this checkbox.	All
<b>Status Type Visibility</b>	Indicates the type is potentially visible to users in other regions, is visible to this region's users based on the user's role, or is private; if you make it visible to users in other regions, all roles automatically have view rights and you cannot change these settings	All
<b>Section</b>	Indicates the status type section in which this type appears within the resource's details page (required); a status type can appear in only one section	All
<b>Resource Detail View</b>	Select to show this status type in the resource's details view	All

Setting	Description	Type
When updating the status, comments are	Optional, mandatory, or unavailable when updating the status	Number, Text, NEDOCS Calculation, Date
Reset Value	Upon expiration, the system resets the status type or retains the value	Number, Text, NEDOCS Calculation, Date
Reset Comment	System resets the status comment at each update or retains the comment between updates	All
User must update status daily for	Status expires at the indicated time(s) on a daily basis (24-hour format)	All
Status Update Frequency	Status expires whenever the status changes or at the indicated interval (days / hours / minutes)	Number, Text, NEDOCS Calculation, Date
Update Grace Period	Period of time considered to be out of the expiration range (minutes); required, default value is zero)	All
Status Reason	Reasons from which the user can or must choose when changing this status	Multi
Timer Type	Enables the display of a counter (down or up) to status expiration in the application window	All

Setting	Description	Type
Reset Timer	System resets the expiration timer when the status changes or when there is an update to the status	Number, Text, Date
Required	When selected, a blank value is not allowed for this status	Text, Date
Valid values for this status type	Any entered value is accepted or indicate the valid value range	Number, Date
Display Summary Totals	When selected, a <b>Summary</b> row appears in views at the bottom of the associated resource type section. A total is shown in this row for all status types with the type Number for which this setting has been enabled. Other status types and other Number status types that do not have this setting enabled show <b>N/A</b> in the <b>Summary</b> row.	Number
Color Status	Color codes the value based on where it falls in the specified ranges	Number, NEDOCS Calculation, Calculated
Display NEDOCS labels	When selected, displays the predefined descriptive label next to the calculated score in the Update Status page, regional views, and maps; clearing this checkbox removes all labels from the view	NEDOCS Calculation

4. Select the roles that have view rights to this status type (**Roles with view rights**).

**Tip:** If the status type is configured to be visible to users in other regions (*Status Type Visibility*), *all roles in Roles with view rights* are automatically selected and you cannot change these settings.

5. Select the roles that have update rights for this status type (**Roles with update rights**).

6. Select or clear **Resource Types** checkboxes.
7. Click **Save**. The *Status Types* page re-opens.
8. For a **Multi**-option status type, you can edit the associated statuses.

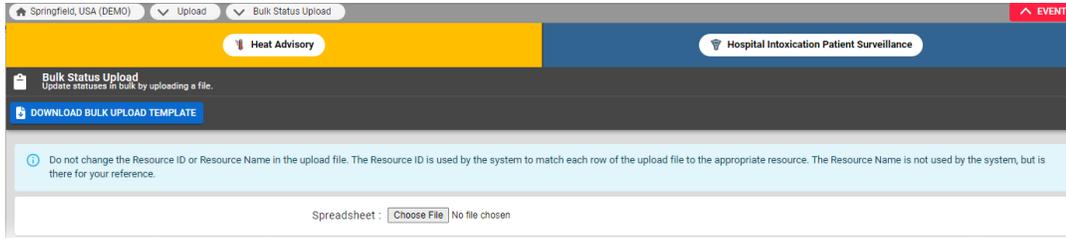
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## Update Status Types in Bulk

If you have access to edit Standard and Event Status Types, you can update these status types in bulk via the Bulk Upload Template, which is accessed through Upload in the main navigation bar.

The Bulk Status Upload option allows you to update Resource Status Types for one or more resources by simply downloading the template, entering the status types, and uploading the information in an Excel or comma-separated values (CSV) file.



### Notes:

- You must download the Bulk Upload Template to populate the resources and status types that you have access to update.
- Any status types that you do not want to update can be left empty and the current value will be retained.
- If you have access to edit Standard and Event Status Types, you can update these status types in bulk.
- To get started, download the template, update the resource status types, and then upload the information.

### To download the template

1. In the main menu, click **Upload** and then click **Bulk Status Upload**. The *Bulk Status Upload* page opens.
2. On the left, click **Download Bulk Upload Template**.

**Note:** If the template does not download, verify that pop-ups are allowed for this website through your browser.

3. Enter your status type updates in the template file and save it.

### To upload the spreadsheet

1. In the main menu, click **Upload** and then click **Bulk Status Upload**. The *Bulk Status Upload* page opens.
2. Click **Choose File**.
3. Through the browser window, locate and click the name of the file you want to upload.
4. Click **Open**.
5. When the spreadsheet is attached, a green checkmark appears next to the file name.
6. To begin the upload, click **Submit Values**. When the file is uploaded, the resources and status updates appear below. The information is available on this page until you navigate away. After that, you can find the information for the last 90 days through the Jobs tab.

In the event that one of your status updates fails, an error message appears and none of the updates for that resource are submitted.

**Note:** While the spreadsheet is processing, you can continue to navigate around the application. To view the file status when you are ready and for the next 90 days, point to **Jobs** and, in the menu, click **Jobs List**.

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## Status Type Visibility

Your region can establish varying levels of control over the visibility of your resources and their statuses. The tighter the access, the more you can ensure that users cannot obtain information that does not pertain to them.

Example: You want your blood bank users to log in to EMResource to report the availability of specific blood types, but these users do not need to be able to view hospital bed and resource availability. You can limit these users' access to blood bank information.

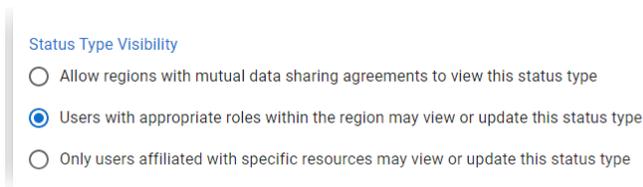
This topic covers your visibility options for a status type and provides an overview of steps to take for each option: Shared, Normal, Private. You can also restrict an individual user's visibility into a resource's status types. Refer to [Users: Resource Rights](#) for more information.

### Option Summary

The *Edit Status Type* and *Create Status Type* pages contain three options for allowing view access to status types.

**Tip:** "Format type" refers to the format of the status type: Date, Multi, Number, or Text. It can also indicate the type is a calculation, as in NEDOCS Calculation.

Refer to the following graphic and table for descriptions of your options:



Level	Option	Description	Scenarios
Shared	Allow regions with mutual data sharing agreements to view this status type	A <b>Shared</b> level of visibility indicates this region shares this status type with other regions (with which it has mutual aid agreements).  When selected, all roles are automatically	A user in another region can view this information as long as their administrator granted them access to other regions.  In general, a user in this region can view this status type.  Select this option for status types you intend to share with other

Level	Option	Description	Scenarios
		granted view rights and you cannot change these settings.	Juware applications. With this option selected, you cannot apply viewing restrictions in your own region.
Normal (role-based)	Users with appropriate roles within the region may view or update this status type	A <b>Normal</b> level of visibility makes it easy to give users the right to view a status type based on their role.	<p>Users in this region can view the status type if their role can view it.</p> <p>An administrator removes an individual user's visibility for specific resources by <a href="#">refining the user's profile</a>.</p> <p>Users in other regions cannot view this status type.</p>
Private	Only users affiliated with specific resources may view or update this status type	A <b>Private</b> level makes it easy to restrict its visibility. The status type can be "hidden" from all users except those who should be able to see it.	<p>A user in this region must be specifically affiliated with a resource to be able to view this status type. That is, the user must have at least one of the following rights: Associated With, Update Status, or Run Reports. The user's role is not a factor in this type of visibility.</p> <p>Users with the <b>View - Override viewing restrictions</b> right may also view this status type. This right can be assigned on either the role or the user level.</p> <p>Users in other regions cannot view this status type.</p>

#### Notes:

- If your region or an affiliated entity is using eICS (Juware application), keep in mind that only status types with **Shared** visibility will be available to users of eICS.
- If you share a status type, making it visible to users in other regions, all roles automatically have view rights and users cannot change these settings.

- When a resource has no visible status types for a View, it does not show in that view. When a user has no visibility into a resource's status types, that resource does not appear in any of the user's View pages.
- To update a resource's status, the user must be granted that specific right.

## Setting Up

To set up **Shared** visibility, do the following:

Element	Action	Refer to...
Resource	Select the <b>Share with Other Regions</b> checkbox	<a href="#">Create a Resource</a> <a href="#">Edit a Resource</a>
Status Type	Select the first option in <b>Status Type Visibility</b> : Allow regions with mutual data sharing agreements to view this status type	<a href="#">Create a Status Type</a> <a href="#">Edit a Status Type</a>

To set up **Normal** (role-based) visibility, do the following:

Element	Action	Refer to...
Status Type	Select the second option in <b>Status Type Visibility</b> : Users with appropriate roles within the region may view or update this status type  Select the roles that can view the status type and the roles that can view and update the status type	<a href="#">Create a Status Type</a> <a href="#">Edit a Status Type</a>
Role	Select the status types that a user with this role can view ( <b>Select the Status Types this Role may view</b> ), or can view and edit ( <b>Select the Status Types this Role may update</b> )	<a href="#">Create a Role</a> <a href="#">Edit a Role</a>

**Notes:**

- When you create a new role, by default users with that role have the right to view and update all status types.
- If you grant a role the right to update a status type, you must also grant them view access

To set up **Private** visibility, do the following:

Element	Action	Refer to...
Status Type	Select the third option in <b>Status Type Visibility</b> : Only users affiliated with specific resources may view or update this status type  Select the roles that can update the status type	<a href="#">Create a Status Type</a>  <a href="#">Edit a Status Type</a>
User	Select one or more of the following resources rights for a user: Associated With, Update Status, Run Reports	<a href="#">Create a User</a>  <a href="#">Edit a User</a>