

# Nursing Pass System

## Workflow Documentation & System Interaction Guide

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### Document Purpose

This document describes the end-to-end workflow for the Walden Behavioral Health Nursing Pass System — a digital platform enabling nursing staff to issue, track, and audit patient movement passes within the facility. It is intended for use by clinical informaticists, IT implementation staff, and nursing supervisors onboarding to the platform.

*This document does not replace clinical training or facility policy. Staff must complete in-person onboarding with a nurse educator before using the system with patients.*

### System Overview

The Nursing Pass System replaces a paper-based process that required nurses to manually log patient passes in a physical binder at the nursing station. The previous process created gaps in real-time visibility, made audits time-consuming, and introduced risk of legibility errors in patient records.

The digital system provides:

- Real-time visibility into patient location and pass status across all units.
- Automated alerts when a pass exceeds its authorized duration.
- Audit-ready logs for compliance and incident review.
- Integration with the facility EHR (Epic) to pull patient status and document pass activity automatically.
- Role-based access ensuring only authorized staff can issue, extend, or revoke passes.

### User Roles

Field	Type	Required	Description
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Issuing Nurse	string	—	Creates and activates passes. Can extend duration up to the defined threshold before supervisor approval is required.
Charge Nurse	string	—	Approves extended or restricted passes. Receives real-time alerts for overdue passes on their unit.
Nursing Supervisor	string	—	Full access to all units. Can override pass restrictions and access audit logs.
Security Staff	string	—	Read-only view of active passes. Receives automated alerts for passes overdue by 15+ minutes.
System Administrator	string	—	Manages user accounts, unit configurations, and integration settings. No clinical access.

## Core Workflow: Issuing a Pass

### Step 1 — Verify Patient Eligibility

Before issuing a pass, the nurse must confirm the patient's current pass eligibility status in the system. Eligibility is pulled in real time from the Epic integration and reflects the patient's current treatment plan restrictions.

1. Navigate to Patient Search and locate the patient by name or MRN.
2. Review the Eligibility Panel on the patient detail screen.
3. If status shows Restricted or Pending Review, a pass cannot be issued without Charge Nurse approval. Proceed to Step 2a.
4. If status shows Eligible, proceed to Step 3.

### Step 2a — Restricted Patient: Request Supervisor Override

When a patient's eligibility status prevents standard pass issuance, the nurse initiates an override request through the platform.

5. Select Request Override from the patient detail screen.
6. Select the reason code from the dropdown. Reason codes are defined by facility policy and maintained by the System Administrator.
7. Add a clinical note (required for restricted patients).
8. Submit the request. The on-duty Charge Nurse receives an in-app notification and push alert.
9. Wait for Charge Nurse approval. The pass issuance screen becomes active once approval is confirmed.

*Override requests not acted on within 10 minutes generate an escalation alert to the Nursing Supervisor. This threshold is configurable per unit by the System Administrator.*

### Step 3 — Configure and Issue the Pass

10. From the patient detail screen, select Issue Pass.
11. Set Pass Type: On-grounds, Off-grounds, or Therapeutic Leave.
12. Set the Authorized Duration using the time picker. Maximum durations per pass type are enforced by the system.
13. Enter the Destination and Escort fields as required by the selected pass type.
14. Select Issue Pass to activate. The pass appears on the unit dashboard immediately.

Field	Type	Required	Description
On-grounds	string	—	Patient remains within facility grounds. Maximum 4 hours. No escort required by default.
Off-grounds	string	—	Patient leaves the facility. Maximum 8 hours. Escort or transport documentation required.
Therapeutic Leave	string	—	Extended overnight or multi-day leave. Requires Nursing Supervisor approval. Documented separately in Epic.

## Pass Lifecycle States

Field	Type	Required	Description
Active	string	—	Pass has been issued and the patient has departed. Timer is running.
Overdue	string	—	Pass duration has elapsed without a return check-in. Alerts sent to issuing nurse, Charge Nurse, and Security.
Returned	string	—	Patient has been checked in by nursing staff. Pass is closed and logged.
Revoked	string	—	Pass was ended early by nursing staff before the patient returned. Reason code required.
Expired (No Return)	string	—	Patient did not return within the grace period after becoming Overdue. Incident workflow triggered automatically.

## EHR Integration

The Nursing Pass System integrates with Epic via a bi-directional HL7 FHIR R4 interface. The integration serves two functions: reading patient eligibility data and writing pass activity back to the patient record.

### Data Flow: Eligibility Pull

15. On patient record load, the system sends a Patient resource query to the Epic FHIR endpoint.

16. The Epic interface returns the patient's current status, active care plans, and any restriction flags.
17. The system evaluates restriction flags against the configured pass eligibility rules table.
18. Eligibility status is displayed in the UI and cached for 5 minutes to reduce API load. A manual refresh option is available.

### **Data Flow: Pass Activity Write-back**

All pass events (issuance, extension, return, revocation) are written back to Epic as DocumentReference resources. This ensures the patient's medical record reflects complete pass activity without manual data entry by nursing staff.

*Write-back failures are logged in the system's integration error queue and surfaced to the System Administrator dashboard. Clinical workflows are not blocked by write-back failures, but unresolved errors should be reviewed within 24 hours to maintain record integrity.*

## **Audit and Compliance**

All system actions are logged with a timestamp, user ID, patient MRN, and action type. Logs are immutable and retained for seven years in accordance with facility policy and applicable state regulations.

Audit reports can be generated by Nursing Supervisors and System Administrators from the Reports section. Available report types include:

- Pass Activity by Unit — all pass events within a date range for a specified unit.
- Overdue Pass Summary — all passes that entered Overdue status, with duration and resolution.
- Override Log — all supervisor override requests with approval status, reason codes, and approver identity.
- User Activity Log — all system actions by a specified user within a date range.

*Audit reports containing patient data must be handled in accordance with facility HIPAA policies. Reports should not be exported to unencrypted storage or shared outside authorized channels.*