

# Clear the Dashboard as a Sender

## Instructions

### Step 1

#### Access patient referral

For more details on how to access existing patient profile, please review the [Edit or Update guide](#).

Welcome to Resource Matching & Referral (RM&R).

**Assessment**  
Send, Assess and Manage Referrals.

**Service Provider**  
Receive client referrals and manage vacancies.

**Reports**  
View and analyze each step of the placement process.

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ServerBuildInformation(applicationName='gateway', revision='f9b4f44a11c7ba77706d61e31905b128219b1dd4', builder='bamboo', buildHost='zion.stratahealth.org', branch='PW10.0.2.2-rc-5', buildCode='SHS-PJ86661-JOB1-1', buildDate='2020-10-19T09:56:52.947-06:00', databaseVersion='830')

### Step 2

#### Locate outdated referrals

- On the dashboard, click on the [Task List](#)
- On the [Days Since Start New Referral](#) column, click on the drop down arrow to sort the referrals from largest to smallest
- Select the patient records that have the largest number
- Select view only

Acting as: TEST - Referral Sender

Active Referrals | Task List | Search

-- all assigned users -- | -- care types --

-- select incomplete sign off --

Name	Care type	Form status	Days Since Start New Referral
999test999_userpreview-02	Rehab/CCC	Incomplete	29 days
999test999_userpreview2020	Rehab/CCC	Incomplete	24 days
999test999_Alice CSS Sept 24	LHIN - Home and Community Care	Incomplete	15 days
999TEST999_RM&R Automated Test - LHIN 1 - 101520	LHIN - Home and Community Care	Incomplete	8 days
999TEST999_RM&R Automated Test - LHIN 2 - 101520	LHIN - Home and Community Care	Incomplete	8 days
999test999_cindy123	LHIN - Home and Community Care	Incomplete	7 days
999test999_cindy-userpreview	LHIN - Home and Community Care	Incomplete	7 days
999test999_cindyuser-previewOct6	Rehab/CCC	Incomplete	3 days
999Test999_Tom - Demo Oct 8	LHIN - Home and Community Care	Incomplete	3 days
999test999_cindy-userpreview	Palliative Care	Incomplete	0 days

1 of 2 | 1 2 |

[View Only](#) [Edit](#)

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### Step 3

#### Review referrals

- A) Review the referrals including the comments for each Service Provider in the Send and Manage Referrals tab

If referral is out of date and no longer appropriate:

- B) click on **Client Details** tab
- C) Click **Edit** button

### Step 4

#### Deactivate referrals

- A) Click on **Deactivate** button
- B) Select most appropriate Reason
- C) Add comments if additional information is relevant
- D) Click on Deactivate

The image shows two screenshots of a web application interface. The top screenshot displays the 'Client Details' tab for a client named '999test999, userpreview-02'. The interface includes a navigation menu with tabs like 'Client Details', 'Demographics', 'Supplementary Information', 'Referral Information', 'Social Information', and 'Care Requirements'. A 'Send and Manage Referrals' button is visible. A 'Profile Report' button is also present. The bottom screenshot shows a 'Deactivate' modal window. The modal contains a warning message: 'Setting this client record to Deactivated will cancel all of this client's referrals for this care type. Please note: Each referral will be Deactivated and will subsequently drop off of the dashboard.' Below the message, there is a 'Reason' dropdown menu set to '- select one -', a 'Comment' text area, and a checkbox for 'I acknowledge that I have reviewed the above information.' At the bottom of the modal are 'Cancel' and 'Deactivate' buttons. The background of the bottom screenshot is dimmed, showing the same client details page as the top screenshot.