

# Assessment Dashboard



## Active Referrals Tab

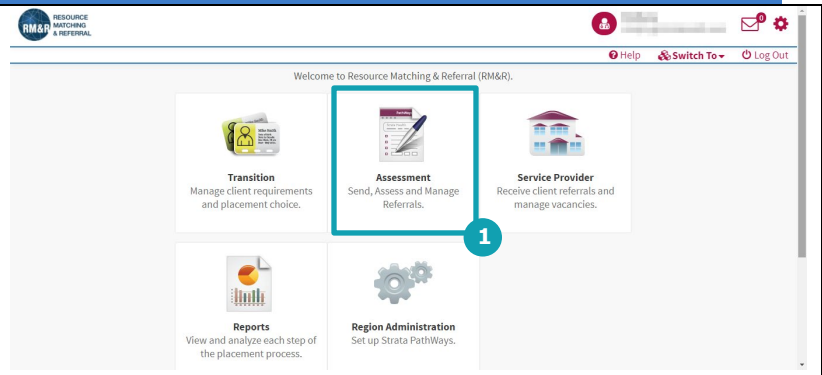
## Assessment Dashboard

Through the assessment dashboard, you can see all referrals from your service area that have been recently sent, are in the process of being sent or have been recently declined. There are three tabs in an Assessment Dashboard: **Active Referrals**, **Task List** and **Client Search**.

## Instructions

### Step 1

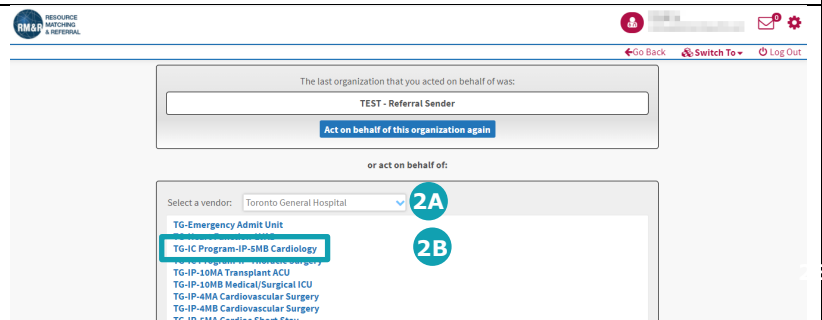
Click the **Assessment** icon on the homepage.



### Step 2

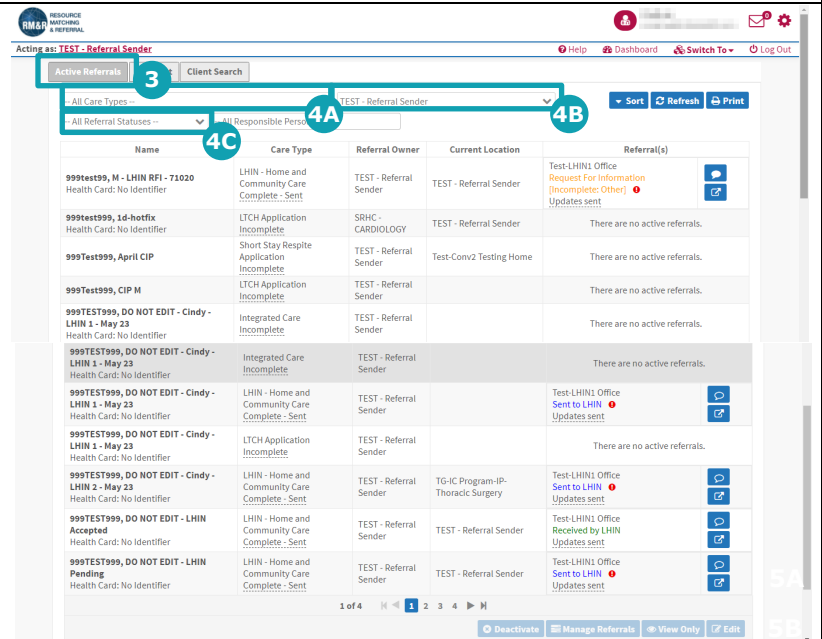
**Select your organization:**

- A) If you have access to **multiple organizations**, select the vendor/hospital (e.g. Toronto General Hospital)
- B) Select your service provider/unit (e.g. TG-IC Program IP-SMB Cardiology)



### Step 3

Click on the **Active Referrals** tab.



### Step 4

#### Filters

You can search for all open referrals from your service area by using one of the following filters, located at the top of the Dashboard:

- A) Care Type
- B) Service Provider
- C) Referral Statuses

Click on the to select an option.

## Step 5

### Sorting

You can sort referrals alphabetically in the following columns:

- Name
- Care Type
- Referral Owner
- Current Location

To sort the respective column:

- Click on the **Sort** button.
- Select which column you would like to sort and by ascending (ASC) OR descending (DESC).

The screenshot shows the 'Active Referrals' tab in the RM&R system. The table has columns for Name, Care Type, Referral Owner, Current Location, and Referral(s). A 'Sort' button is highlighted with a blue box and the number 5. A dropdown menu is open, showing options to sort by Client name (ASC/DESC), Referral Owner (ASC/DESC), Care Type (ASC/DESC), and Current Location (ASC/DESC). The 'Client name ASC' option is highlighted with a blue box and the number 5A. Other callouts include 5B for the Referral Owner column, 5C for the Current Location column, and 5D for the Referral(s) column.

## Step 6

### Form Status

- Under the Care Type Column, the status of the form is indicated:

- Complete – Sent
- Complete – Not Sent
- Incomplete

- When you select **Incomplete**, the tabs that are not completed will appear.

The screenshot shows the 'Active Referrals' tab in the RM&R system. The table has columns for Name, Care Type, Referral Owner, Current Location, and Referral(s). The 'Care Type' column contains status indicators: 'Complete - Sent', 'Complete - Not Sent', and 'Incomplete'. Callouts 6A, 6B, 7A, and 7B highlight these status indicators and the 'Referral(s)' column. A legend at the bottom indicates that red triangles represent 'Client Details', 'Demographics', and 'Request For Assessment'.

## Step 7

### A) Referral(s)

This column indicates the receiving organization's response

- The responses are:
  - Pending** – The referral has not been actioned on
  - Accepted** – The referral has been accepted the referral. After the referral has been accepted, the receiving organization may **Admit** and the referral will then drop off the dashboard.
  - Request for Information (RFI)** – The receiving organization requires more information to process the referral.

- **Deny** – The referral has been denied. The patient does not meet the receiving organization’s admit/accept criteria.

For more information, please refer to the quick guides:

- Respond to Requests for Information
- Respond to Denied Referrals

### Step 8

Once the active referrals have been refined, select the patient. After you have selected the patient, the background colour will change from grey to blue.

### Step 9

Click on either View Only or the Edit button:

- If a referral is no longer required, click the **Deactivate** button and move forward with the prompts.
- To view the patient’s referral(s), click the **View Only** button.
- To edit the patient’s referral(s), click the **Edit** button.

The screenshot displays the 'Active Referrals' tab in the LHMAR system. The table lists the following referrals:

Name	Care Type	Referral Owner	Current Location	Referral(s)
999TEST999, DO NOT EDIT - Cindy - LHM 2 - May 23 Health Card: No Identifier	LHM - Home and Community Care Complete - Sent	TEST - Referral Sender	TG-IC Program-IP- Thoracic Surgery	Test-LHM Office Sent to LHM Updates sent
Roots, Betty Ida Health Card: 7229360776	LHM - Home and Community Care Complete - Sent	TG-IC Program-IP- Thoracic Surgery	TG-BC South 4-IP	Toronto Rehab - E.W. Rickie Centre LHM Office (IP) Received by LHM Updates reviewed
STUDENT, TRAINING04	LHM - Home and Community Care Incomplete	TG-IC Program-IP- Thoracic Surgery		There are no active referrals.

At the bottom of the table, a red warning banner indicates: Client Details, Demographics, Request For Assessment. Below the table, the following buttons are visible: Deactivate (9A), Manage Referrals, View Only (9B), and Edit (9C).