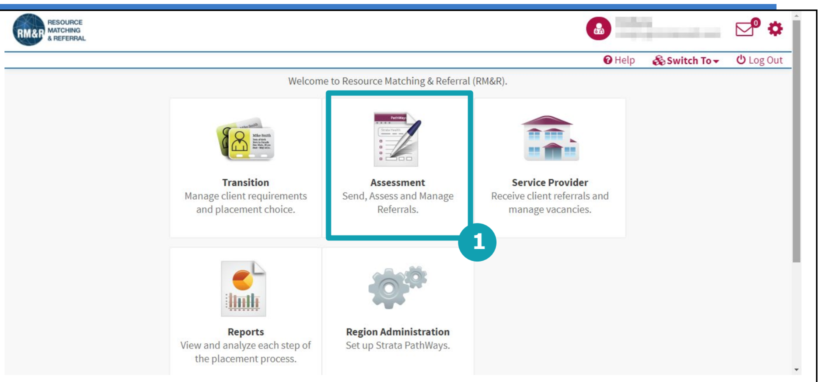
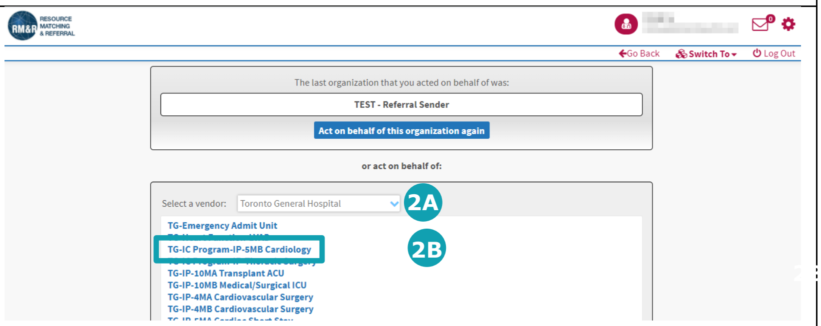
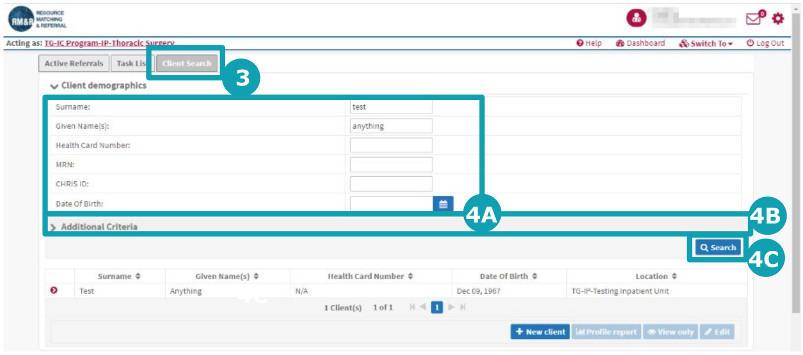
Assessment Dashboard

Client Search 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 ***Client Search*** tab. **Step 4** You can search for the patient by entering information under: A) ***Client demographics*** B) ***Additional Criteria*** C) Once you have completed entering your search terms, click on the ***Search*** button.	

Step 5

Search results will appear in the lower portion of the window. Select your patient, it will change the background from grey to blue.

Step 6

Click on either View Only or the Edit button:

A) To view the patient’s referral(s), click the **View Only** button.

B) To edit the patient’s referral(s), click the **Edit** button.