

Task List

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**.

The **Task List** allows you to quickly review all incomplete referrals that require action.


Instructions

<p>Step 1</p> <p>Click the Assessment icon on the homepage.</p>									
<p>Step 2</p> <p>Select your organization:</p> <p>A) If you have access to multiple organizations, select the vendor/hospital (e.g. Toronto General Hospital)</p> <p>B) Select your service provider/unit (e.g. TG-IC Program IP-SMB Cardiology)</p>									
<p>Step 3</p> <p>Click on the Task List tab.</p> <p>Step 4</p> <p>Filters</p> <p>You can search for incomplete referrals from your service area by using the following filters:</p> <p>A) All assigned users Designated as the 'Responsible Person(s)'</p> <p>B) All care types – Type of referral form</p> <p>C) Select incomplete sign-off – Which referrals have no received Physician or Nurse Practitioner Sign-off (if applicable)</p> <p>Click on the <input type="checkbox"/> to select an option.</p>	<table border="1"> <thead> <tr> <th>Name</th> <th>Care type</th> <th>Form status</th> <th>Days Since Start New Referral</th> </tr> </thead> <tbody> <tr> <td>STUDENT, TRAINING04</td> <td>LMIN - Home and Community Care</td> <td>Incomplete</td> <td>5 days</td> </tr> </tbody> </table>	Name	Care type	Form status	Days Since Start New Referral	STUDENT, TRAINING04	LMIN - Home and Community Care	Incomplete	5 days
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STUDENT, TRAINING04	LMIN - Home and Community Care	Incomplete	5 days						

Step 5

You can alphabetically sort the following columns:

- A) Name
- B) Care type
- C) Form Status
- D) Days Since Start New Referral –
The column shows the number of days an outstanding referral has been in process

To sort the respective column, click the pertinent  icon. (Click once for ascending, twice for descending)

Step 6

After sorting/filtering referrals, **select the patient** and the background will change from grey to blue.

Step 7

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.

