Assessment Dashboard





Last Updated: August 2020

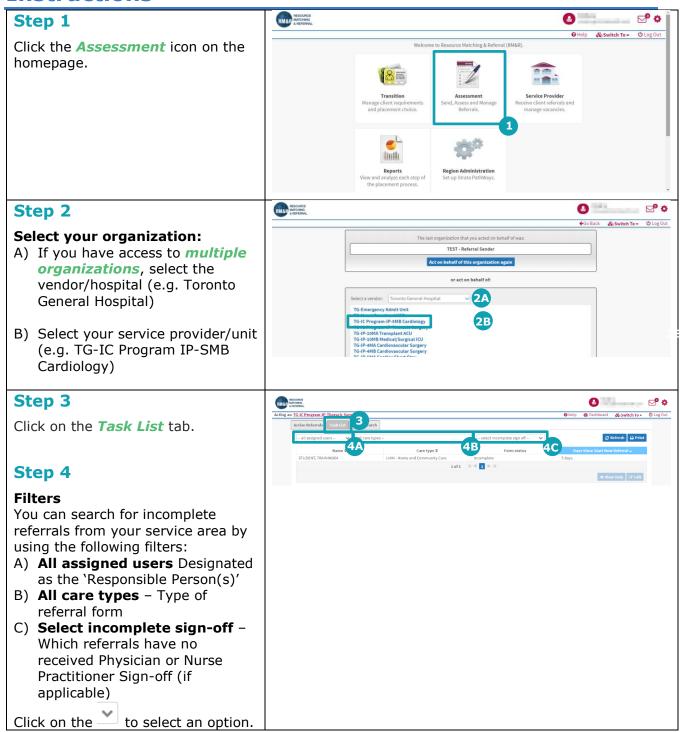
Task List

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



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)

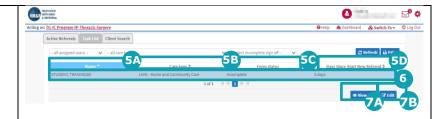
Step 6

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.



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