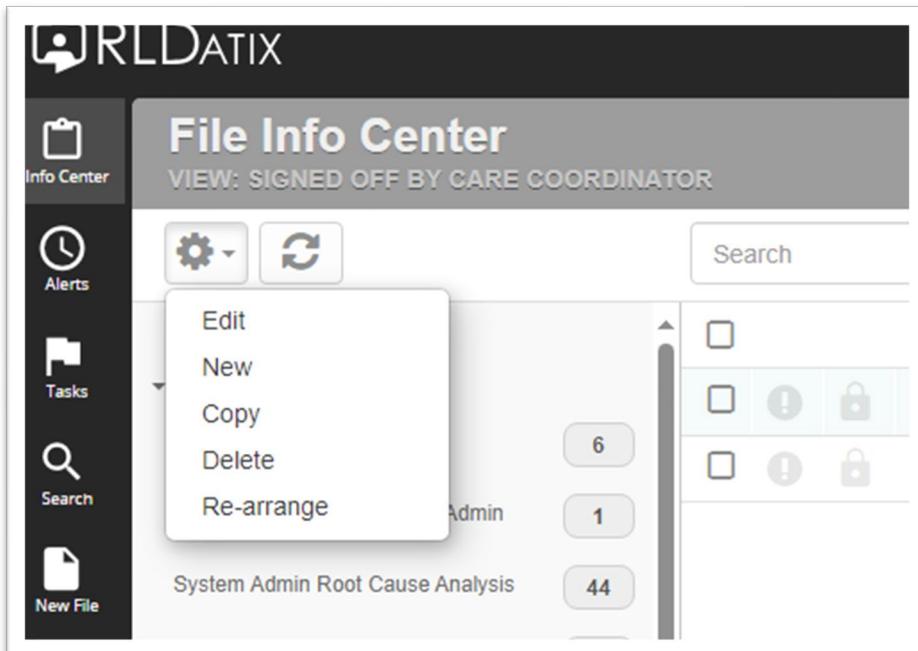


How to Create a Personal Views for Sign-offs

Steps to create a personal view that looks for files that have been signed off by another manager

Step 1: Click on “Info Center” in the top right to open the Info Center if you are not there already.

Step 2: Click on the settings icon in upper right and select “New”



Step 3: The settings tab for the new view you are going to create will display

A. Select “Risk” for the Module

B. Give your new view a name that makes sense to you, I have selected “Files that have signed off by Social Worker”

Settings	Filters	Columns	?
Entity (Required)	File		
Module (Required)	Risk		
Caption (Required)	Files that have been signed off by Social Worker		
Page Size (Required)	50		
<div style="text-align: right;"> Exit Save </div>			

Step 4: Click to on the “Filters” tab

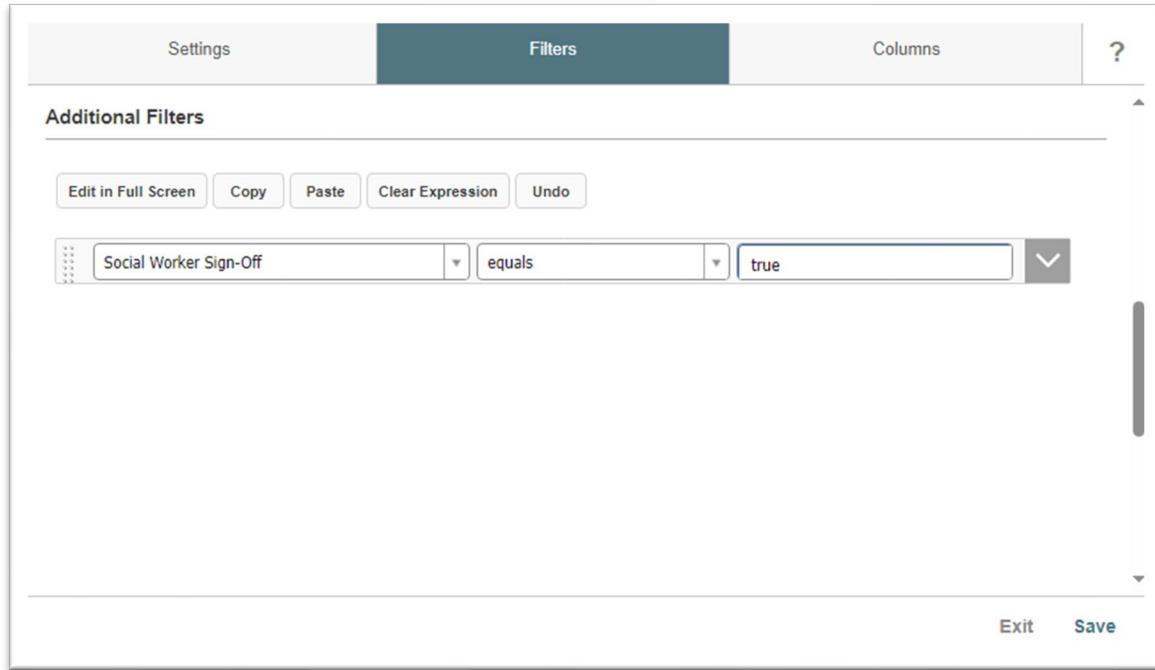
A. Scroll down the “additional filters” section (leave the default selections in the top as they are)

B. Type sign-off in the “Select a field section” - this will display all the sign-offs available

Settings	Filters	Columns	?
Additional Filters			
<div style="display: flex; justify-content: space-between;"> Edit in Full Screen Copy Paste Clear Expression Undo </div>			
<div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> <div style="flex: 1;"> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 5px;">Select a Field</div> <input style="border: 1px solid #ccc; padding: 2px; width: 150px; height: 20px; margin-right: 5px;" type="text" value="sign-off"/> 🔍 </div> <div style="flex: 1;"> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 5px;">Select Operator</div> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 5px;">▼</div> <input style="border: 1px solid #ccc; padding: 2px; width: 150px; height: 20px; margin-right: 5px;" type="text" value="Type a Value"/> ▼ </div> </div>			
<div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Select a Field</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">sign-off</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">🔍</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Incident</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">ADON Sign-offs</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">C Suite Sign-offs</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Care Coordinator Sign-offs</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Days to Sign-off DON</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Director of Nursing Sign-Offs</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">HR Sign-Off</div> </div>			
<div style="text-align: right;"> Exit Save </div>			

C. Select the sign off you would like your view to look for, in this case I will select “Sign off by Social Worker”

D. Complete the rest of the expression to read “equals true,” note that this is a calculated field that only accepts the values “true and false”



Step 5: Click on the “Columns” tab

A. Click the “trash can” icon next to the File Name (this already appears in the locked fields above so removing is frees up space in your view)

B. Use the columns of dots next to each field name to click and drag fields up or down – this will allow you to put your most valuable information first

C. Scroll down to the bottom and use the “Add Column button” to add any additional fields you would like to see – this is an optional step

Step 5: Click Save in the lower right and you will now see your new view displayed under the “Personal Views” section of the info center.

Now that you have the basic filters to use, you can add additional filters to create more specific views. ***Note: to add new lines, you will click on the gray down arrow at the end of the existing condition and select the “+New Line” option. This will default to using the connector “AND” which is what you will need to be sure all conditions are present in the files. If you are only looking for at least one of the conditions to be present from your filter, you would want to use the “OR” connector.***

Here are the conditions to add your filter if you would like to see files signed off by a particular manager that have not been signed off by you:

Settings **Filters** Columns ?

Additional Filters

Edit in Full Screen Copy Paste Clear Expression Undo

AND ↴ Manager/Administrator/Director ... equals true
Signed Off is empty ↴

Exit Save

This screenshot shows a filter configuration interface with a 'Filters' tab selected. The 'Additional Filters' section contains an 'AND' condition. The first sub-filter is 'Manager/Administrator/Director ... equals true'. The second sub-filter is 'Signed Off is empty'. The interface includes standard buttons for 'Edit in Full Screen', 'Copy', 'Paste', 'Clear Expression', 'Undo', 'Exit', and 'Save'.

Similarly, if you would like to see files signed off by multiple managers that have not been signed off by you, your filter would look like this:

Settings **Filters** Columns ?

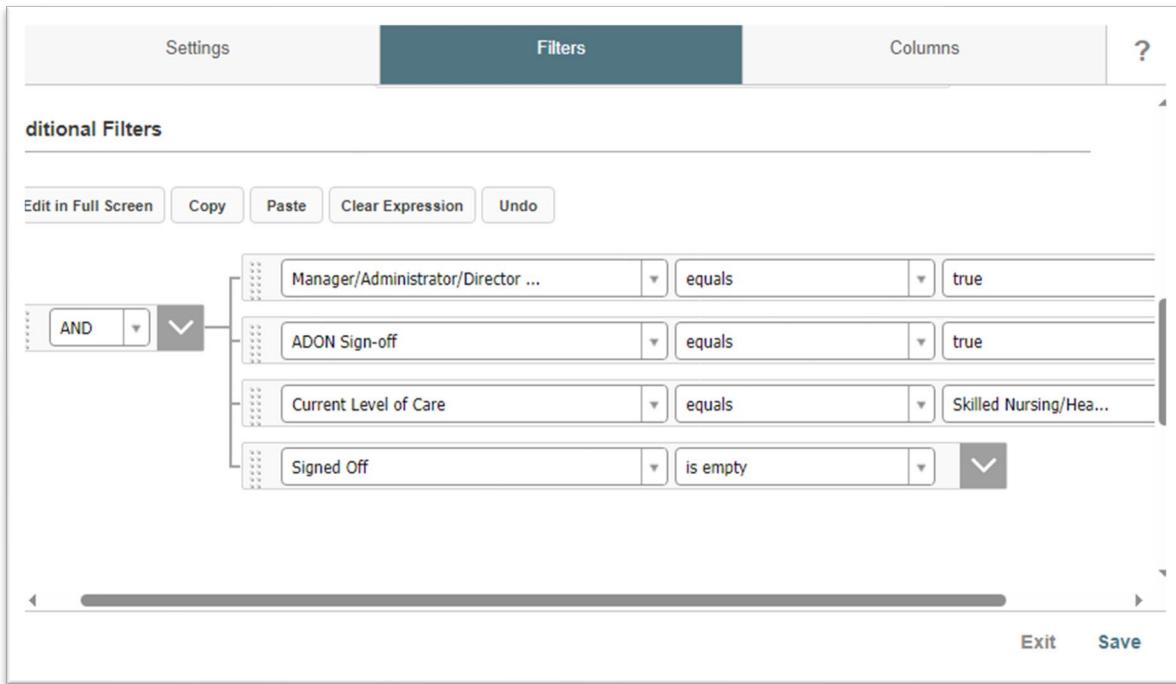
Edit in Full Screen Copy Paste Clear Expression Undo

AND ↴ Manager/Administrator/Director ... equals true
ADON Sign-off equals true
Signed Off is empty ↴

Exit Save

This screenshot shows a filter configuration interface with a 'Filters' tab selected. The 'Additional Filters' section contains an 'AND' condition with three sub-filters: 'Manager/Administrator/Director ... equals true', 'ADON Sign-off equals true', and 'Signed Off is empty'. The interface includes standard buttons for 'Edit in Full Screen', 'Copy', 'Paste', 'Clear Expression', 'Undo', 'Exit', and 'Save'.

If you would like to see files that have been signed off by a certain manager in specific level of care, your filter would look like this:



There are many ways to format this view to show just the files that are ready for your sign-off.

If you have questions on how to format your specific view, contact AQORD PEER Support Services.