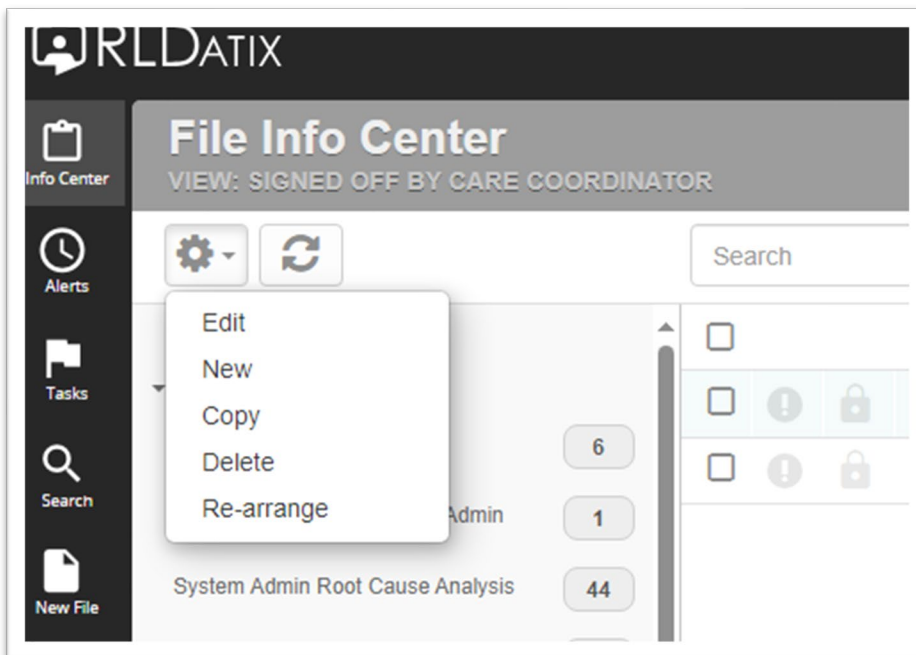


How to Create a Personal Views for Sign-offs

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”

The screenshot shows the 'Settings' tab of a configuration interface. It contains four required fields: 'Entity' set to 'File', 'Module' set to 'Risk', 'Caption' set to 'Files that have been signed off by Social Worker', and 'Page Size' set to '50'. At the bottom right are 'Exit' and 'Save' buttons.

Settings	Filters	Columns	?
Entity (Required)	File		
Module (Required)	Risk		
Caption (Required)	Files that have been signed off by Social Worker		
Page Size (Required)	50		

Exit Save

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

The screenshot shows the 'Filters' tab of the configuration interface. It features an 'Additional Filters' section with buttons for 'Edit in Full Screen', 'Copy', 'Paste', 'Clear Expression', and 'Undo'. Below these is a search bar with 'sign-off' entered, which has triggered a dropdown list of sign-off fields. The list includes 'Incident' as a header and several specific sign-off fields like 'ADON Sign-offs', 'C Suite Sign-offs', etc. At the bottom right are 'Exit' and 'Save' buttons.

Settings	Filters	Columns	?
Additional Filters			
Edit in Full Screen Copy Paste Clear Expression Undo			
Select a Field Select Operator Type a Value			
sign-off			
Incident			
ADON Sign-offs			
C Suite Sign-offs			
Care Coordinator Sign-offs			
Days to Sign-off DON			
Director of Nursing Sign-Offs			
HR Sign-Off			

Exit Save

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

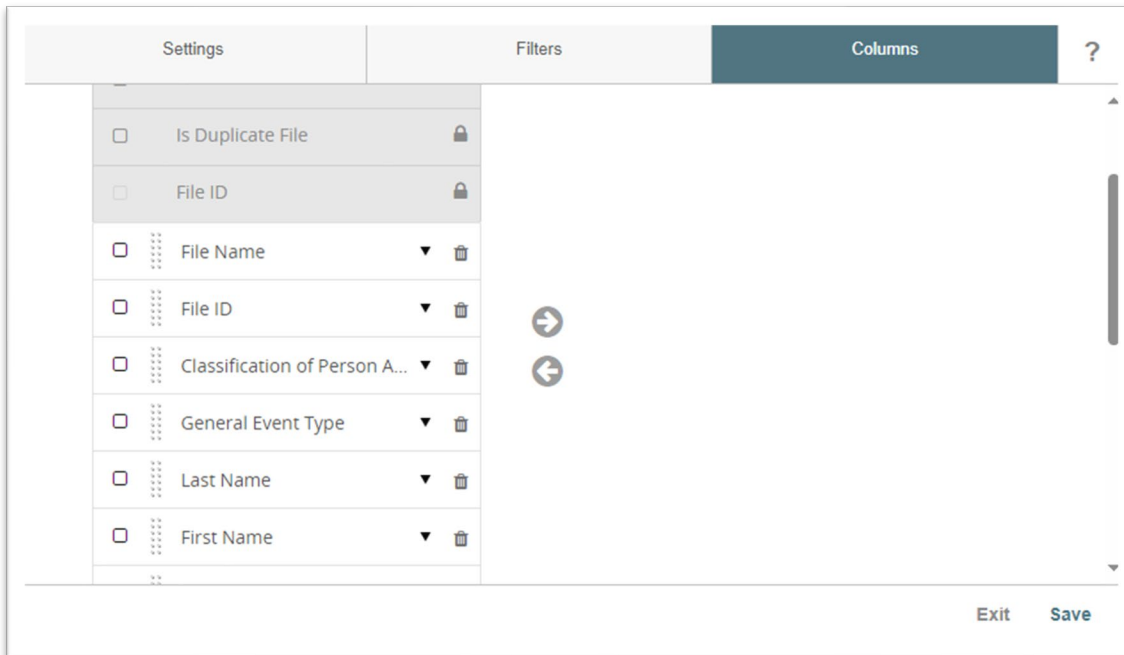
D. Complete the rest of the expression to read “equals true,” note that this is a calculated field that only accepts the values “true and false”

The screenshot shows a software interface with three tabs: 'Settings', 'Filters' (which is active and highlighted in dark blue), and 'Columns'. A help icon (?) is in the top right corner. Below the tabs is the 'Additional Filters' section, which contains a toolbar with buttons: 'Edit in Full Screen', 'Copy', 'Paste', 'Clear Expression', and 'Undo'. Below the toolbar is a filter expression builder. It consists of three main parts: a field name 'Social Worker Sign-Off' with a dropdown arrow, an operator 'equals' with a dropdown arrow, and a value 'true' with a dropdown arrow. To the left of the field name is a vertical column of dots for reordering. At the bottom right of the interface are two buttons: 'Exit' and 'Save'.

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 it 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

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

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:

The screenshot shows a software interface with three tabs: 'Settings', 'Filters' (which is active and highlighted in dark blue), and 'Columns'. A help icon (?) is in the top right corner. Below the tabs is a section titled 'ditional Filters' (likely 'Additional Filters'). Under this title are five buttons: 'Edit in Full Screen', 'Copy', 'Paste', 'Clear Expression', and 'Undo'. The main area contains a filter expression builder. On the left, there is a dropdown menu showing 'AND' and a grey button with a downward arrow. To the right of this, four filter rules are listed, each with a small icon on the left and a grey button with a downward arrow on the right:

- Manager/Administrator/Director ... equals true
- ADON Sign-off equals true
- Current Level of Care equals Skilled Nursing/Hea...
- Signed Off is empty

At the bottom right of the interface are two buttons: 'Exit' and 'Save'.

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.