

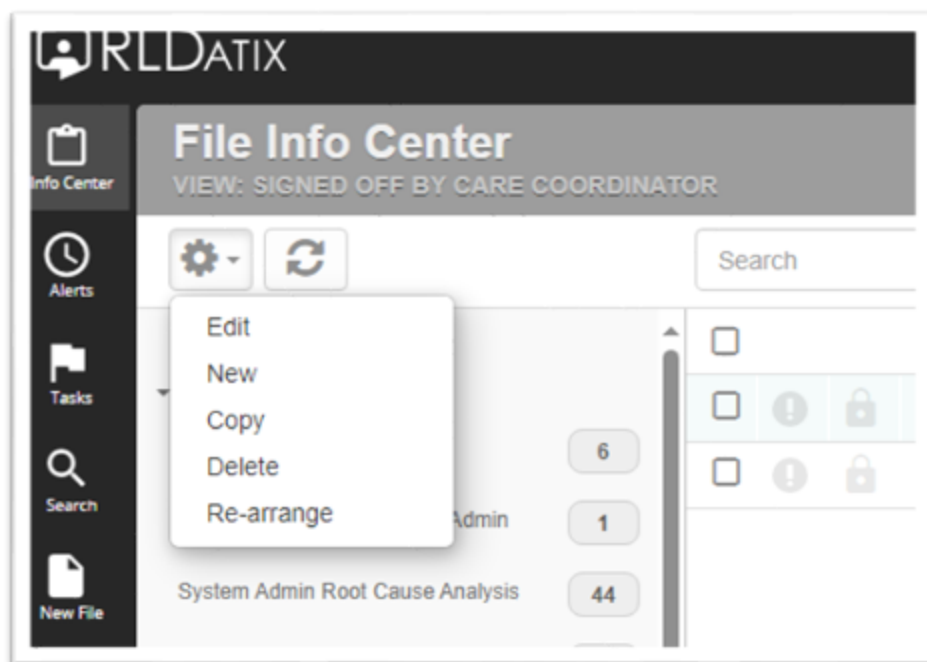


How to Create a Personal Views for Sign-offs

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 a configuration window with three tabs: 'Settings' (selected), 'Filters', and 'Columns'. A help icon (?) is in the top right corner. The 'Settings' tab 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.

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 selected. The 'Additional Filters' section is expanded, showing buttons for 'Edit in Full Screen', 'Copy', 'Paste', 'Clear Expression', and 'Undo'. Below these is a filter builder with a 'Select a Field' dropdown (showing 'sign-off'), a 'Select Operator' dropdown, and a 'Type a Value' text box. A list of fields is displayed under 'sign-off': Incident, ADON Sign-offs, C Suite Sign-offs, Care Coordinator Sign-offs, Days to Sign-off DON, Director of Nursing Sign-Offs, and HR Sign-Off. 'Exit' and 'Save' buttons are at the bottom right.

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

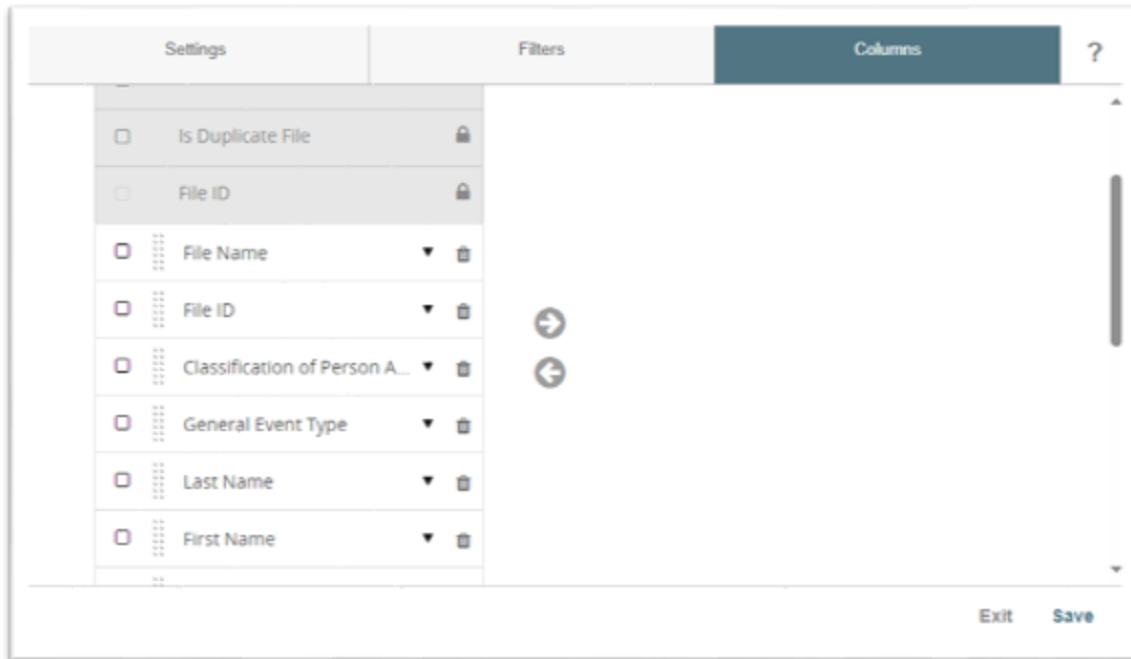
D. Complete the rest of the expression to read “equals true,” note that this is a calculated field that only accepts the values “true and false”

The screenshot shows a software interface with three tabs: 'Settings', 'Filters' (which is active and highlighted in dark blue), and 'Columns'. Below the tabs is a section titled 'Additional Filters'. Inside this section, there are five buttons: 'Edit in Full Screen', 'Copy', 'Paste', 'Clear Expression', and 'Undo'. Below these buttons is a filter expression builder. It consists of three main parts: a dropdown menu showing 'Social Worker Sign-Off', a dropdown menu showing 'equals', and a text input field containing 'true'. To the right of the text input is a small downward-pointing arrow icon. At the bottom right of the interface, there 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:

The screenshot shows the 'Filters' tab of a software interface. At the top, there are three tabs: 'Settings', 'Filters' (which is active and highlighted in dark blue), and 'Columns'. To the right of these tabs is a question mark icon. Below the tabs, the section is titled 'Additional Filters'. Under this title, there are five buttons: 'Edit in Full Screen', 'Copy', 'Paste', 'Clear Expression', and 'Undo'. The main area contains a filter rule. On the left, there is a box with 'AND' and a dropdown arrow. To its right, there are two filter conditions connected by a vertical line. The first condition is 'Manager/Administrator/Director ...' followed by a dropdown arrow, 'equals', another dropdown arrow, and the value 'true'. The second condition is 'Signed Off' followed by a dropdown arrow, 'is empty', another dropdown arrow, and a dropdown arrow pointing down. At the bottom right, there are two buttons: '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:

The screenshot shows the 'Filters' tab of a software interface, similar to the one above. It has the same tabs ('Settings', 'Filters', 'Columns') and buttons ('Edit in Full Screen', 'Copy', 'Paste', 'Clear Expression', 'Undo'). The filter rule is more complex. It starts with the same 'AND' box. To its right, there are three filter conditions connected by vertical lines. The first condition is 'Manager/Administrator/Director ...' followed by a dropdown arrow, 'equals', another dropdown arrow, and the value 'true'. The second condition is 'ADON Sign-off' followed by a dropdown arrow, 'equals', another dropdown arrow, and the value 'true'. The third condition is 'Signed Off' followed by a dropdown arrow, 'is empty', another dropdown arrow, and a dropdown arrow pointing down. At the bottom right, there are two buttons: '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:

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 located in the top right corner of the tab bar. Below the tabs, the section is titled 'ditional Filters'. Under this title, there are four 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 vertical list of filter items with a tree structure. The first item is expanded, showing a logical connector 'AND' followed by a downward arrow. To the right of this connector are four filter rules, each with a field, an operator, and a value:

- Field: 'Manager/Administrator/Director ...', Operator: 'equals', Value: 'true'
- Field: 'ADON Sign-off', Operator: 'equals', Value: 'true'
- Field: 'Current Level of Care', Operator: 'equals', Value: 'Skilled Nursing/Hea...'
- Field: 'Signed Off', Operator: 'is empty', Value: (empty dropdown menu)

At the bottom right of the interface, there 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 FSA PEER Support Services.