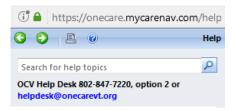# Care Navigator Tips and Tricks

OneCare Vermont

1. **Help Desk Information:** For any additional questions or help within Care Navigator please contact the Help Desk at helpdesk@onecarevt.org or 802-847-7220, option 2. You can also click on the ? in the upper right hand corner of Care Navigator to access our information which will display our contact information:
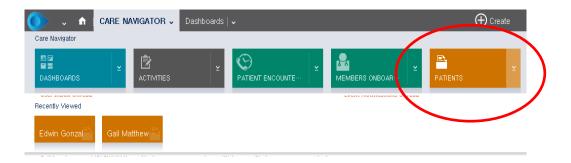
   ![Help window screenshot showing https://onecare.mycarenav.com/help, a search box for help topics, and text "OCV Help Desk 802-847-7220, option 2 or helpdesk@onecarevt.org"]

2. **Internet Explorer is the preferred browser** for working in Care Navigator.

3. **We also recommend that you NOT save your password or browser information.**

4. **Return to the Care Navigator home page**: Click House icon from any screen 🏠 .

5. **How to return to patient record**:
   i. From any place within the patients record click on the patient's name at the top of the screen to return to the patient record: `FNAME105 LNAME...  ∨`
   ii. When in a sub-menu within a patient record click on any hyperlink containing the patient name to return to the patient record: Patient * FNAME105 LNAME105

6. **Active Patients vs. My Active Patients:** Active patients will return a list of all patients that are within the Organization you are assigned to. My Active Patients will return a list of those patients who you have been assigned to their care team.

7. **Easily return to previously viewed patients**: Hover over Care Navigator on the top bar, slide to Patients and hit drop down arrow to see a list of recently viewed patients to return to during the current session:

   ![Care Navigator navigation bar screenshot showing tiles DASHBOARDS, ACTIVITIES, PATIENT ENCOUNTE..., MEMBERS ONBOAR..., PATIENTS (circled in red), and Recently Viewed with Edwin Gonzal... and Gail Matthew...]

8. **Search for Patients** (two options):
    i. From the search bar under 'Active Patients' or 'My Active Patients', type in:
        - Complete all or a portion of the first name
        - * (asterisk)
        - Complete all or a portion of name

    ii. From the home page hover over the Care Navigator option and select the Patient tile. Once on the list view of patients enter the patient name in the same format as above in the search bar.
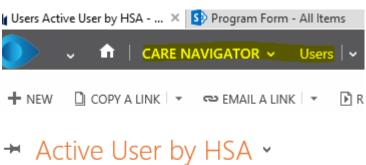

9. **To Update the Patient Header:** Click on the refresh button in your top browser to update the Patient Header (yellow banner on top of client's home page) with fields added (Lead CC, Acuity, Primary Contact, etc.)

10. **Save** allows you to stay on the current screen and add another item.
    Save and Close returns you to the previous screen.

11. **Expand a list:** Clicking on the grid icon (top right corner of a table) will expand the list you're looking at.

12. **To open drop-down menus**: click in a field that contains a dropdown (field highlights gray when a drop-down menu is available) and select the option that best describes the patient status.

13. **Searching for other Care Navigator Users:** the following steps can be completed to identify other registered Care Navigator users:

    i.   Hover on the Care Navigator Icon

    ii.   Choose the 'Users tile' (to find, arrow all the way to the right, the 'Users' tile will be the last tile)

iii.   You can filter by HSA in this view and export to excel if desired.

iv.   Note when you click on a letter at the bottom that that will bring you to a user with the last name of the letter you click on. Example if you click on A that will give you all users with the last name that start with A.