

Care Navigator Filtering and Personal Views

Log in at <https://onecare.mycarenav.com>

User Support: HelpDesk@onecarevt.org or (802) 847-7220 Option 2

Filtering:

1. From your home screen go to My Active Patients. Click on the grid.

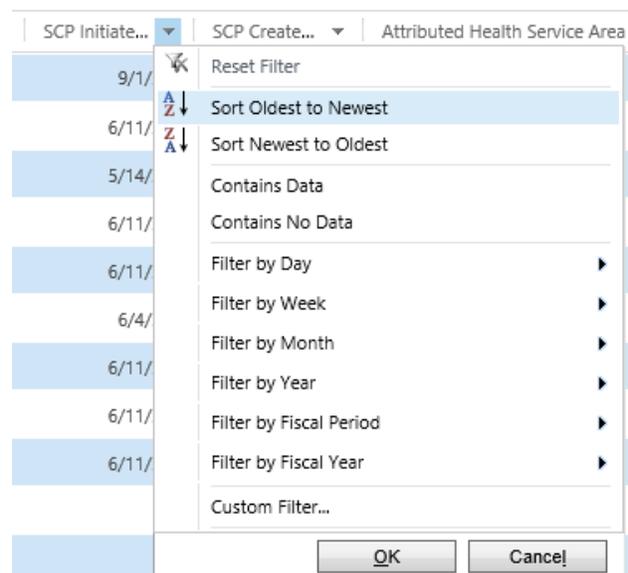
My Active Patients ▾



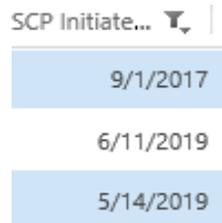
2. From here you can choose to filter on My Active Patients or click the down arrow next to My Active Patients and chose Active Patients if you want to expand your filtering.



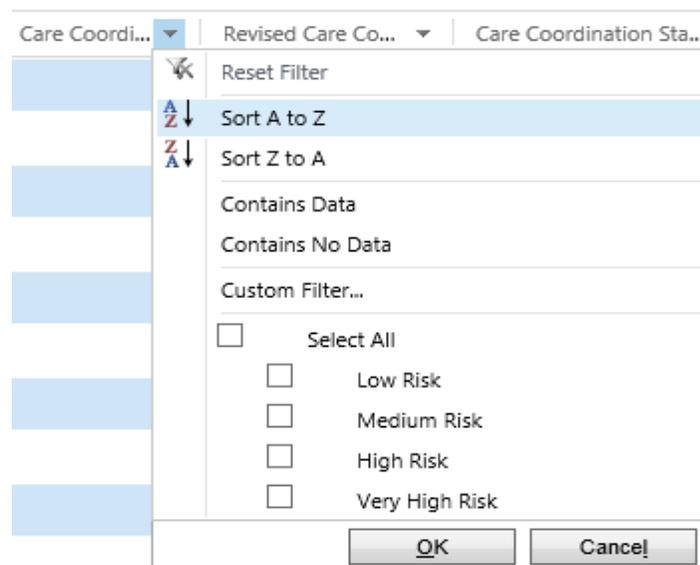
3. Turn your filter button on. It is the funnel shaped icon 
4. You can filter on any of the fields in the grid line. For example if you wanted to filter on the SCP Initiated you would: Click on the down arrow next to SCP Initiated.
5. Then you could either do a Custom Filter or filter by Contains Data, or any other option



- Once you chose what criteria you want to filter on it will return a list of patients that have an SCP Initiated and show you the date the SCP was initiated.



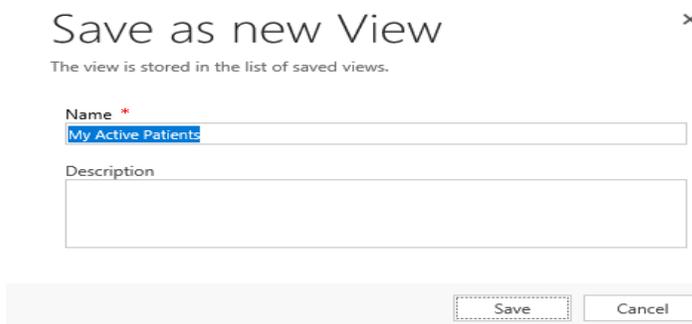
- Depending on what column you choose to filter on you can create a Custom Filter, Contains Data or check boxes of criteria you want to see. Each column offers various options to filter.



- You can continue to refine your filter in any of the columns and it will continue to display the information you wish to filter on.

Saving Filters as a New View

9. Once you are done filtering you can save as a new view. You will need to click on the drop down arrow next to My Active patients or Active Patients depending on which criteria you are use
10. Scroll down to Save Filter as New View 
11. You will then see a box pop up that says Save as new View



Save as new View ×

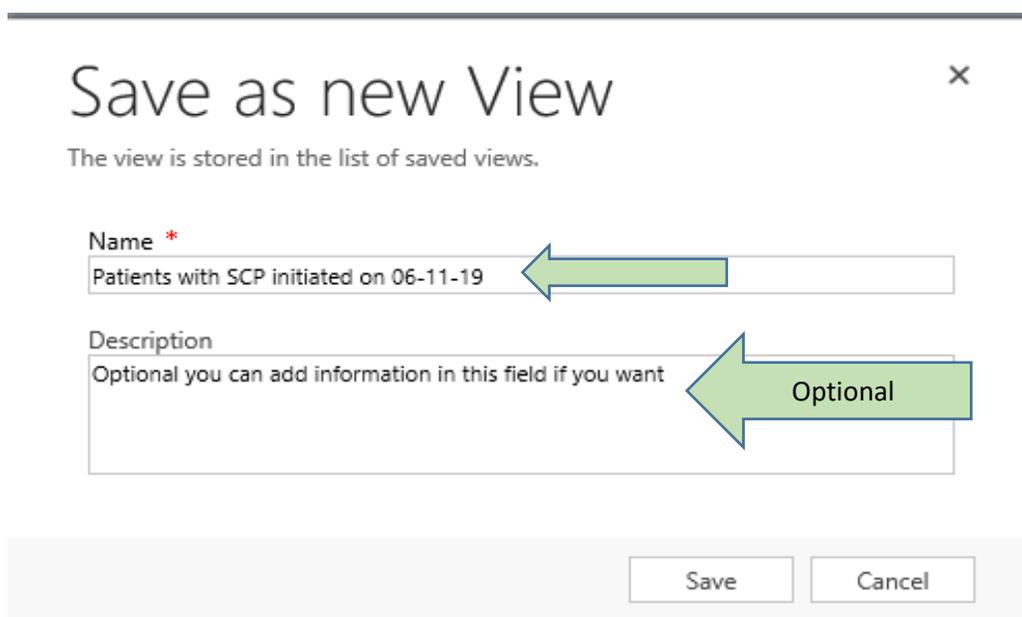
The view is stored in the list of saved views.

Name *
My Active Patients

Description

Save Cancel

12. Name the view in the Name box and add a description.



Save as new View ×

The view is stored in the list of saved views.

Name *
Patients with SCP initiated on 06-11-19

Description
Optional you can add information in this field if you want

Optional

Save Cancel

13. Click Save
14. Your screen will now show the name of the new view you just created.

→ Patients with SCP initiated on 6-11... ▾ 

✓ Last Name ↑ ▾	First Name ▾	Date of Birt... ▾	Age ▾
LNAME101	FNAME101	1/1/1950	69
LNAME104	FNAME104	12/11/1972	46

15. To find the view you created next time you are working in Care Navigator you will start from your home screen and click the grid next to My Active patients.

My Active Patients ▾  

16. Click the drop down arrow next to My Active Patients
17. Then scroll down to the My Views section

→ My Active Patients ▾

My Views

- Burlington High and very high
- High/Very High by CC Status
- High/Very High with Lead Care Coordinator
- My Active Patients - SCP
- My Active Patients - SCP Created
- My Active Patients - SCP Initiated
- My Active Patients - SCP None
- My Patients - CC Level (All)
- My Patients - CC Level (Blank)
- My Patients - CC Level (High)
- My Patients - CC Level (Low)
- My Patients - CC Level (Medium)
- My Patients - CC Level (Very High)
- My Patients - CC Status (All)
- My Patients - Created Care Plan
- My Patients - Initiated Care Plan
- My Patients - No Care Plan
- Patients with SCP initiated on 6-11-19 



18. Find the view that you are looking for then click on it
19. It will then bring you to the view you created.

✈ Patients with SCP initiated on 6-11... ▾

✓	Last Name ↑	First Name	Date of Birth	Age	Member ID
	LNAME101	FNAME101	1/1/1950	69	
	LNAME104	FNAME104	12/11/1972	46	

20. You can work from this view depending on what the view is or you can click the drop down arrow next to the name of the view you created and chose My Active Patients or Active Patients depending on what you are looking for.