

# TC Dashboard (new) Quick Reference

2/9/2015

The screenshot shows the Microsoft Dynamics CRM interface for the TC Dashboard (new). The top navigation bar includes 'Microsoft Dynamics CRM', 'HFS MFP', and 'Dashboards'. The main area is divided into three sections: 'MFP Cases by Stage', 'Unassigned', and 'My Activities'.

**MFP Cases by Stage:** A funnel chart showing 'My Engaged Cases' with two categories: CONTACT (blue, 5 cases) and INFORMED CONSENT (orange, 3 cases).

**Unassigned:** A table listing cases with columns: Case Number, Must Contact, First Name, Last Name, RIN (Participant), Date Of Birth, Stage Name, Facility, County (Facility), and Program. The table shows 8 rows of data.

**My Activities:** A table listing activities with columns: Subject, Reg, Case Number, Must Contact Before, First Name, Last Name, RIN (Participant), Date Of Birth, Stage Name, Facility, County (Facility), Program, and Ma. The table shows 7 rows of data.

**Callouts and Annotations:**

- Click HFS MFP to navigate to referrals, activities, or cases.
- Complete a global search by entering information in this box and click enter (cases, referrals, activities, facilities).
- Click the box icon to open a new window showing the view.
- Dashboard Name - Click the arrow to change dashboards.
- View name - Click the arrow to change between available views.
- This list shows all new referrals – once assigned they will be removed from this list.
- You can quick search by typing here and pressing enter. First name, last name or Case number. Type \* first for a wild card search.
- Click a column heading to sort on that column.
- This list shows all cases you have access to that have not been contacted yet. Note the must contact before date!
- All re-referral notices will show up in your activity list here. Once marked complete they will be removed from this list.
- Click a case number to go directly to the case.
- Click a facility to see the address and phone number for that facility.

This chart shows a breakdown of all your engaged cases

Click HFS MFP to navigate to referrals, activities, or cases

Complete a global search by entering information in this box and click enter (cases, referrals, activities, facilities)

Click the box icon to open a new window showing the view

Dashboard Name - Click the arrow to change dashboards

View name - Click the arrow to change between available views

This list shows all new referrals – once assigned they will be removed from this list

You can quick search by typing here and pressing enter. First name, last name or Case number. Type \* first for a wild card search

Click a column heading to sort on that column

This list shows all cases you have access to that have not been contacted yet. Note the must contact before date!

All re-referral notices will show up in your activity list here. Once marked complete they will be removed from this list

Click a case number to go directly to the case

Click a facility to see the address and phone number for that facility