

# Care Coordination

SERVICE PROVIDERS



**Community Care** **NB**  
**Soins Communautaires**

| USER GUIDE |

Version 0.8

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## CONFIDENTIAL STATEMENT

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### Version & Document Control Table

This version control table provides historical data about each update made to a document. It is useful to include the author, date and notes about each change made to refer back to what these changes were.

<b>Version Control</b>			
<b>Version</b>	<b>Edited</b>	<b>Date</b>	<b>Changes</b>
0.1	Amy Michaud	06/03/2024	First Draft
0.2	Amy Michaud	07/25/2024	Reviewed and edited content/ reformatted /added versions and confidential statement
0.3	Amy Michaud	07/31/2024	Define Service Requests / Defined Urgency Types
0.4	Amy Michaud	09/17/2024	Service Request ID information
0.5	Amy Michaud	11/14/2024	Dashboard / Updated Screenshots / Notifications / Connected Tab
0.6	Amy Michaud	12/06/2024	Miscellaneous Request / Client Search
0.7	Amy Michaud	02/25/2025	Additional Dashboard Report Types / Complex vs. Simple / Updated Screenshots and Terminology
0.8	Amy Michaud	04/16/2025	Updating Screenshots / Order Summary / Removing Connected Tab / Updated Accepted and Activated description / Updated Statuses

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## MODULE A2 – CARE COORDINATION

**PURPOSE:** Become familiar with the background and concepts of the CCNB platform.

### Module Overview

CommunityCareNB is a digital platform for Service Providers to manage services and directly communicate with Social Development. CommunityCareNB allows for the information related to the people we share and serve to be all in one place. This guide will focus on the Care Coordination role within CommunityCareNB. To learn more about CommunityCareNB (purpose, icon definitions and basic navigation), refer to [Module A1 – Introduction to CommunityCareNB Partner Portal](#). For information related to financial tasks, refer to [Module A3 - Finance](#).

While working in CommunityCareNB with the Care Coordination persona, you will have access to various functions and features. These functions and features include:

- Receiving and responding to requests for service (e.g., SD worker, days, hours, what type of support), and relevant client information.
- Communicate with SD worker about incidents, observed changes, and to request changes to services.
- Active and historical information will be visible in the same place for easy reference and review. These topics and more will be covered throughout the user guide.

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## Order Summary

An Order Summary is created by a Social Development (SD) Worker. It contains information pertinent to the client such as: name, address, contact information, Primary SD Worker, and much more. Each Order Summary is assigned a unique number by the system and tracks changes to the original order, meaning that all modifications and amendments can be found on the Order Summary window. This is done to reduce the possibility of duplication and overlapping of services. Additionally, the Order Summary outlines the number of hours/days, the duration (start and end dates) of services, as well as the client's preferred days of the week.

If changes should be made to an Order Summary (e.g., Pause; Terminate; Increase, etc.), this can be done by [Logging a Change Request](#). While changes are being made to an Active Order Summary, it will go into a state of "Pending". This means that, if required, communication with Social Development (i.e., through service reports) can continue by accessing the relevant client's service request.

Lastly, a Service Request has different stages of viewable/accessible information and actionable items (e.g., logging an incident report).

- An [offered service](#) order will only provide basic information related to the service and the client's general location (client's name is not visible at this stage).
- Activated service order will display all pertinent information (e.g., name, address, etc.) however, you will not be able to log service reports (incident and observable changes) or request changes to service. Additionally, you will be able to log the following service reports:
  - Log an Incident Report
  - Log an Observable Change
  - Log a Change Request
  - Log a Request (miscellaneous)
- A pending service order status is displayed when SD Staff is making modifications to the record. When finalized, the order will automatically be updated from Pending to Activated and an email will be sent to notify you of the changes made to a service order.

All service orders (with the exception of declined) are found under the **Service Request** tab.

## Offered Order

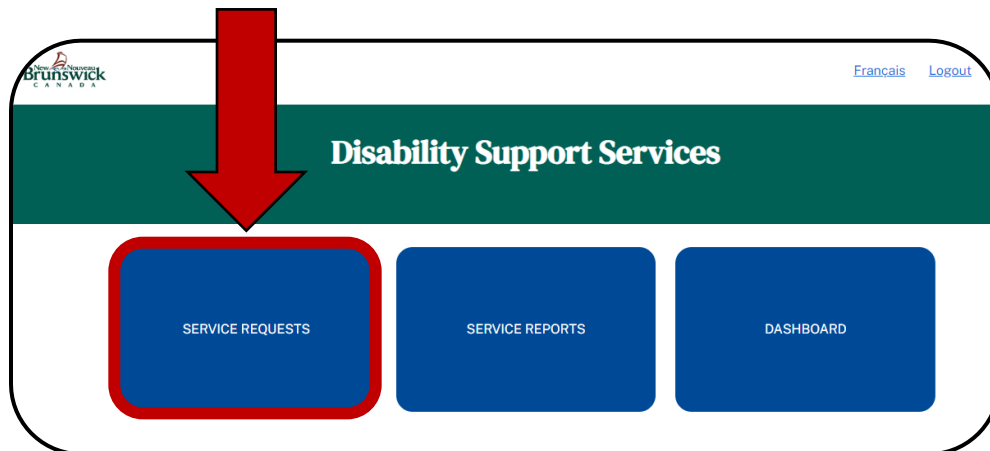
An Offered Order is one that has been sent by Social Development and requires reviewing by the Service Provider. To view an offered order in order to accept or decline, navigate Service Request page to view and manage pending service requests and basic client information such as: **client name**, contact information, Primary SD worker, service request details, notes to service provider, preferred schedule, etc.

The following topics will cover how to accept, decline, view and add comments to offered orders.

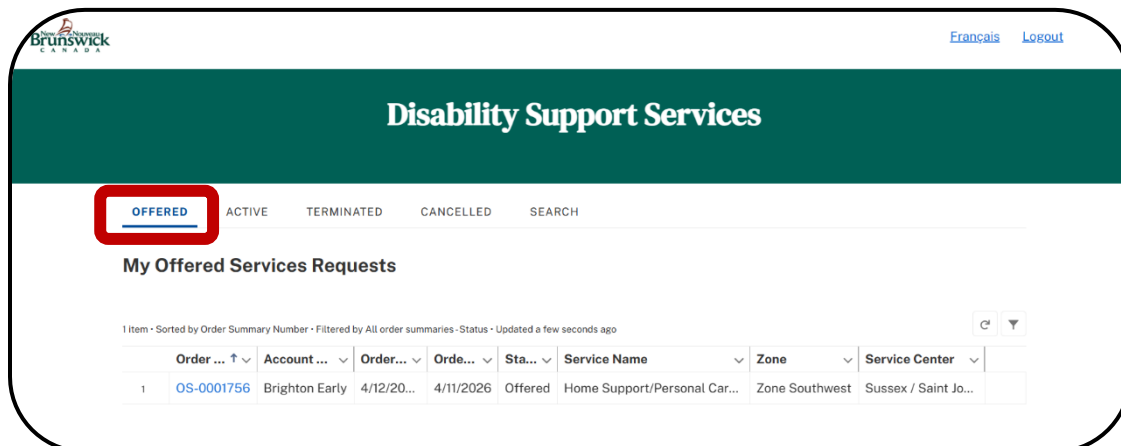
### View Offered Orders

To locate and view basic and essential information on a pending service request, follow the steps below:

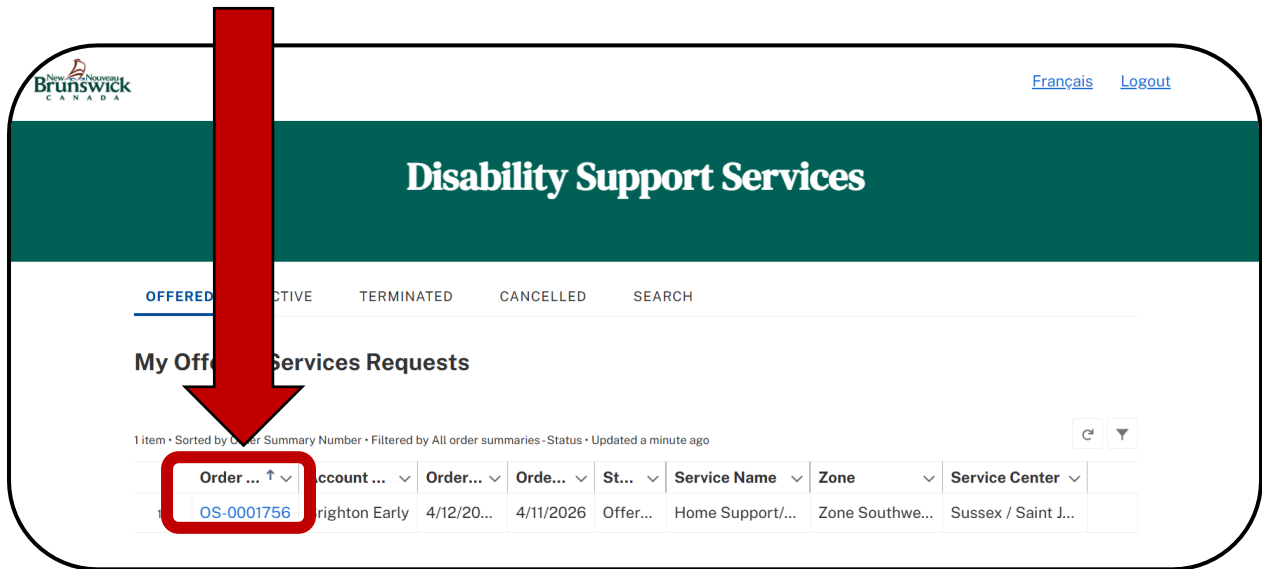
1. From the homepage, select the **Service Requests** tile.



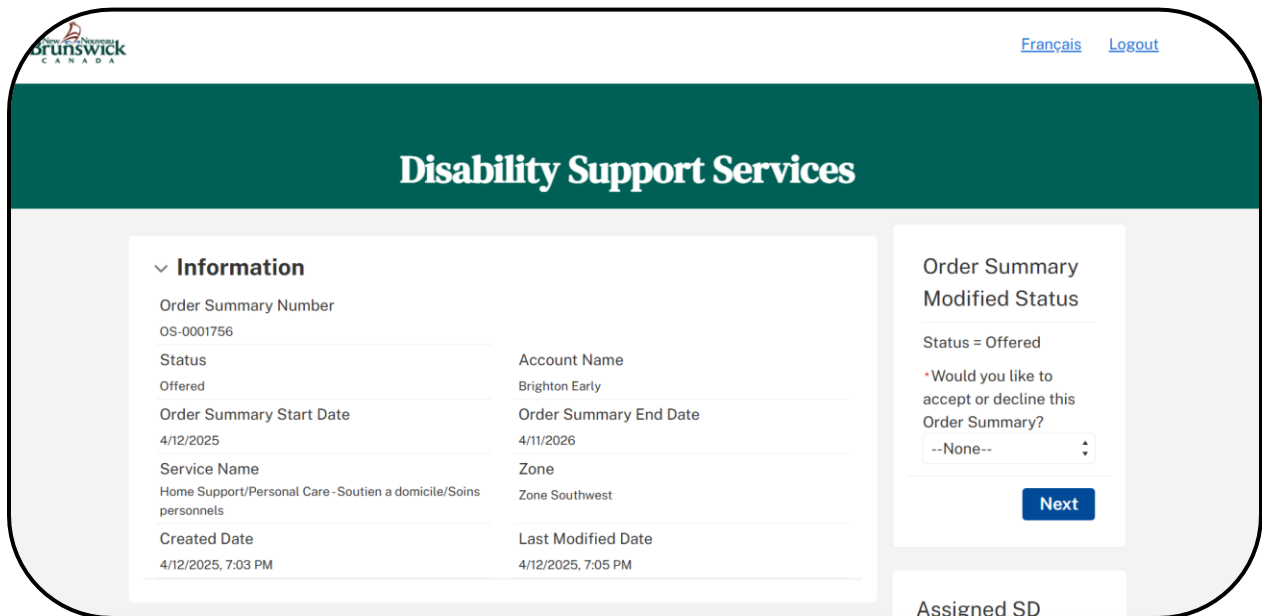
2. The **Offered** tab is automatically displayed.



3. Select the **Order Number Hyperlink** to view order information.



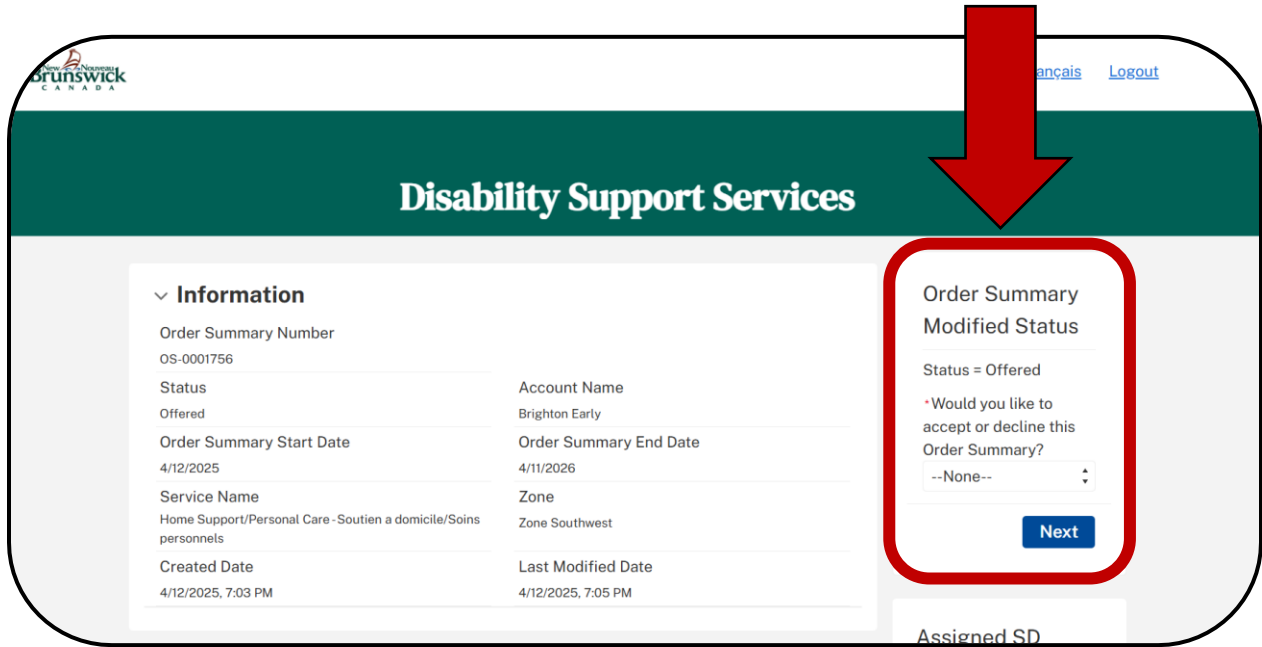
4. The Offered Order opens and displays the necessary information required to either **accept** or **decline** (i.e., contact information, service type and recurrence, etc.).



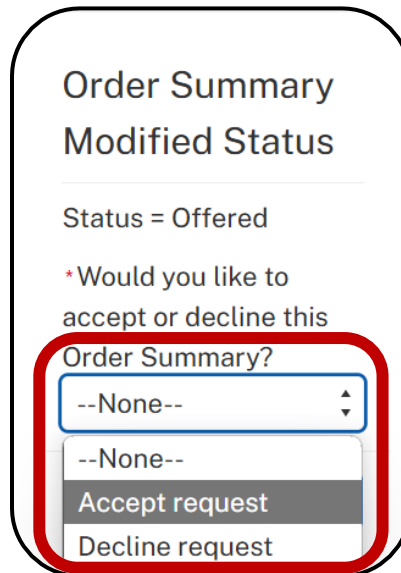
**NOTE:** If ever a client’s social worker needs to be confirmed or contacted, open the service request and the Assigned SD Worker will always be current.

## Accept Offered Order

1. Locate and open an **Offered Order** found under the offered tab.
2. Once opened and reviewed, locate the **Order Summary Modified Status** field.



3. Select the dropdown menu with “- -None- -” displayed.
4. Select “Accept request”.



5. Click the **Next** pushbutton.
6. A verification question will appear in the **Order Summary Modified Status** field.

*Optional: include a message for Social Development.*

### Order Summary Modified Status

---

Are you sure you want to **accept** this service request?

Optional message for Social Development

Cancel
Accept request

7. The **Order Status** is updated to from Offered to **Activated**.

Français [Logout](#)

Disability Support Services

**Information**

Order Summary Number	Account Name
OS-0001698	MELISSA RACHYL
<b>Status</b>	Order Summary End Date
Activated	7/31/2025
Order Summary Start Date	Zone
4/1/2025	Zone Central
Service Name	Last Modified Date
Home Support/Personal Care - Soutien a domicile/Soins personnels	4/15/2025, 3:07 PM
Created Date	
4/7/2025, 1:46 PM	

Order Summary Modified Status

Status = Activated

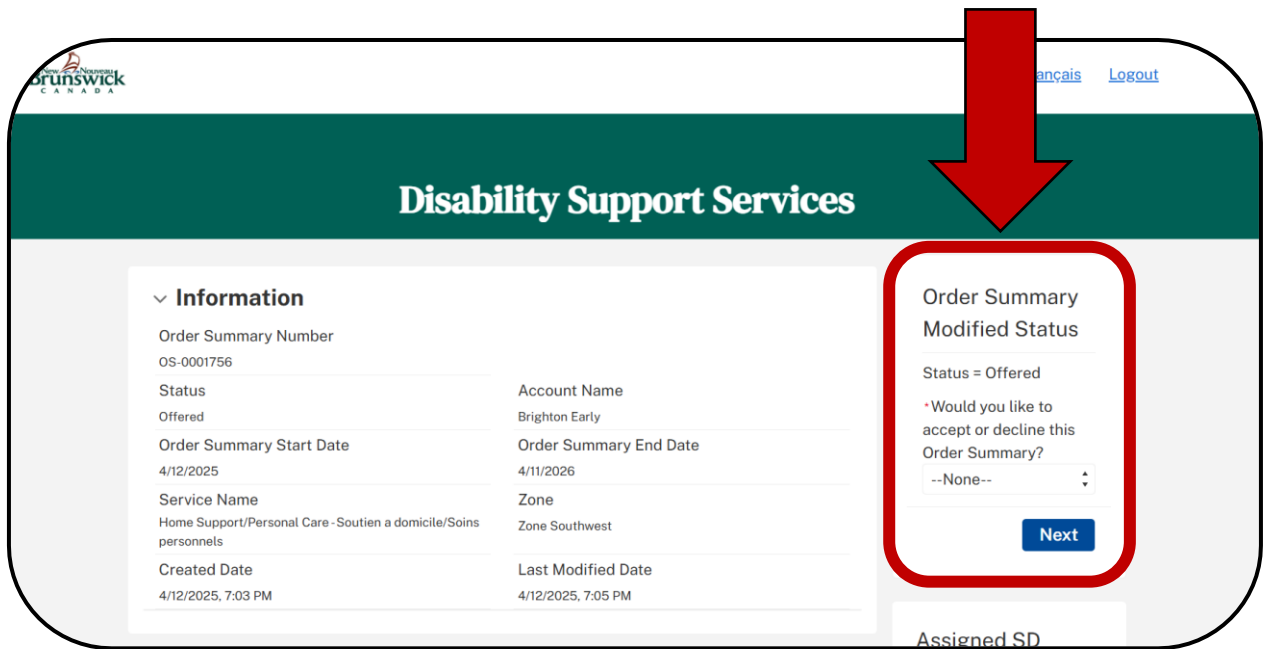
Assigned SD Worker

Amy Michaud

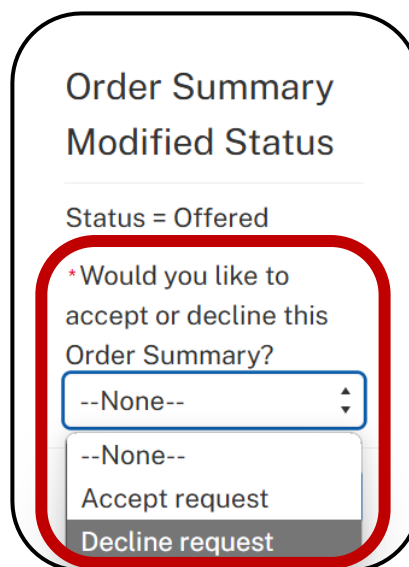
## Decline Offered Order

Select decline if unable to accommodate the full request (e.g., total number of hours) OR select decline and add a comment indicating what can be provided.

1. Locate and open an **Offered Order** found under the Pending tab.
2. Once opened and reviewed, locate the **Order Summary Modified Status** field.

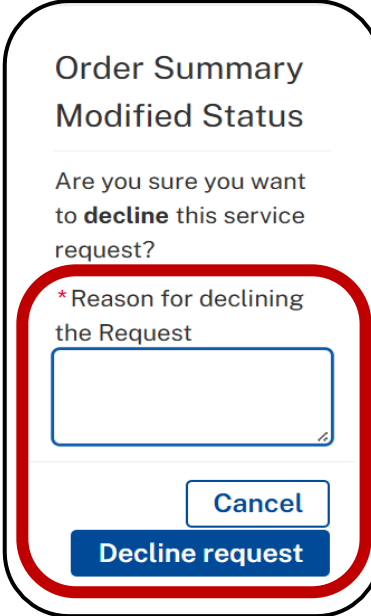


3. Select the dropdown menu with “- -None- -” displayed.
4. Select “**Decline request**”.



5. Click the **Next** pushbutton.
6. A verification question will appear in the **Order Summary Modified Status** field.

*Optional: include a message for Social Development. If partial services are possible, provide request information here.*



Order Summary  
Modified Status

Are you sure you want to **decline** this service request?

\* Reason for declining the Request

Cancel

Decline request

7. The declined **Order** is no longer displayed, the window refreshes and the Homepage is now displayed.

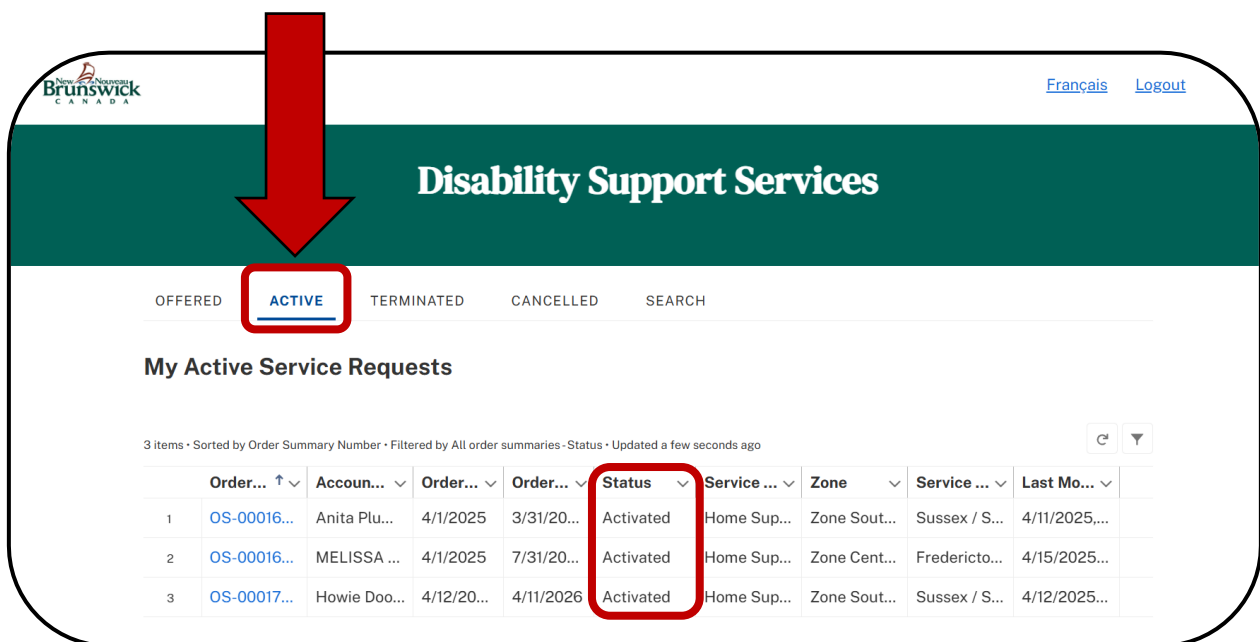
**NOTE:** Orders are no longer visible once declined; however, offered, pending, active, terminated, and cancelled orders can be all be viewed under the Service Request tab.

## Activated & Pending Orders

Once a services Order Summary has been accepted, it will now automatically be Active. An activated order let you log service reports (i.e., request changes be made to the service) and confirm services with the Department. The status will change to Pending if an SD Worker is making changes to the Activated order - while in pending, service providers are unable to submit service confirmations.

### Navigating & Viewing

1. From the homepage, select the **Service Requests** tab.
2. Once the window is displayed, select the **Active** tab.



The screenshot shows the 'Disability Support Services' web application. The navigation bar includes 'OFFERED', 'ACTIVE', 'TERMINATED', 'CANCELLED', and 'SEARCH'. The 'ACTIVE' tab is selected and highlighted with a red box. Below the navigation bar, the 'My Active Service Requests' section is displayed, showing 3 items. The table below has columns for Order Number, Account Name, Order Date, End Date, Status, Service Type, Zone, Service Area, and Last Modified. The 'Status' column is highlighted with a red box.

	Order... ↑	Accoun... ↓	Order... ↓	Order... ↓	Status ↓	Service ... ↓	Zone ↓	Service ... ↓	Last Mo... ↓
1	OS-00016...	Anita Plu...	4/1/2025	3/31/20...	Activated	Home Sup...	Zone Sout...	Sussex / S...	4/11/2025,...
2	OS-00016...	MELISSA ...	4/1/2025	7/31/20...	Activated	Home Sup...	Zone Cent...	Fredericto...	4/15/2025...
3	OS-00017...	Howie Doo...	4/12/20...	4/11/2026	Activated	Home Sup...	Zone Sout...	Sussex / S...	4/12/2025...

3. Select the applicable Order Number to view additional information and log service reports.

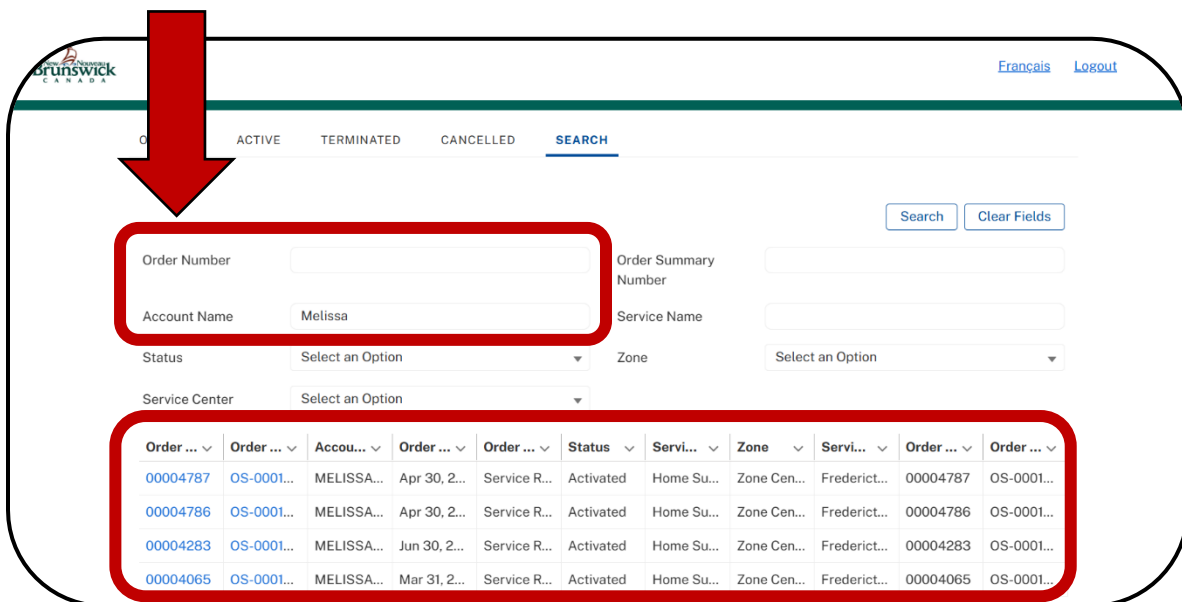
## Search for Clients

The **Search** tab found under **Service Requests** (Homepage) gives you the ability to search for clients by their name, Order Number, or Order Summary number. Additionally, you can refine the searches by selecting the zone, status, and service center. Not all fields need to be completed to conduct a search.

**IMPORTANT:** When searching by status, only the following status types will produce any results. Although other status types appear, they are not enabled, and no results will appear in the list.

- Offered
- Activated
- Pending
- Terminated
- Cancelled

1. Open the **Search** tab under the **Service Request** (Homepage).
2. Enter the client's name or Order Number and click **Search**. Before conducting another search, ensure to click the **Clear Fields** button.

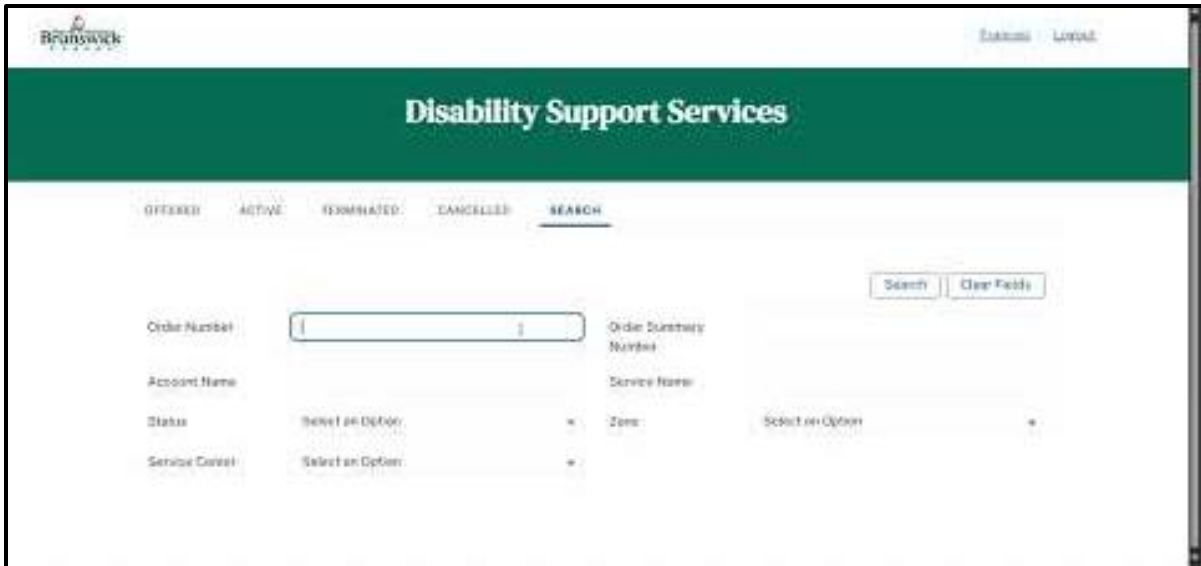


The screenshot shows the 'Search' tab selected in the 'Service Request' section. The search criteria are: Order Number (empty), Account Name (Melissa), Order Summary Number (empty), and Service Name (empty). The search results table is as follows:

Order ...	Order ...	Accou...	Order ...	Order ...	Status	Servi...	Zone	Servi...	Order ...	Order ...
00004787	OS-0001...	MELISSA...	Apr 30, 2...	Service R...	Activated	Home Su...	Zone Cen...	Frederict...	00004787	OS-0001...
00004786	OS-0001...	MELISSA...	Apr 30, 2...	Service R...	Activated	Home Su...	Zone Cen...	Frederict...	00004786	OS-0001...
00004283	OS-0001...	MELISSA...	Jun 30, 2...	Service R...	Activated	Home Su...	Zone Cen...	Frederict...	00004283	OS-0001...
00004065	OS-0001...	MELISSA...	Mar 31, 2...	Service R...	Activated	Home Su...	Zone Cen...	Frederict...	00004065	OS-0001...

3. If searching by Account Name, the list will display all related clients with a similar name, as well as all related orders, unless the search is refined and specific. **Refer to the video demonstration below for more examples on how to use the Search features.**

**CLICK ON THE VIDEO IMAGE TO BEGIN THE DEMONSTRATION**



## Service Reports

Once an Order is Activated, three types of reports become available to you. These reports are used to support ongoing communication and collaboration between the service provider and Social Development: Incident Reporting, Observable Change, and Change Request.

When an **incident** occurs with a client, it needs to be reported to Social Development. This can now happen within CommunityCareNB via the partner portal account. This new digital incident reporting has items that auto-populate and drop-down menus to make it easier to complete and monitor trends.

In addition to incident reporting, service providers can now share pertinent information about a client that is not an incident but could be an early warning sign or a positive achievement. This new feature is called, **log an observable change**.

Additionally, Service Provides now can **request a change** to the client’s service such as adjustments in hours of service, temporary pause of service, and end service. The ability to **Log a Request** on a terminated Order is available to you as well.

## Where to Log & How to Access Service Reports

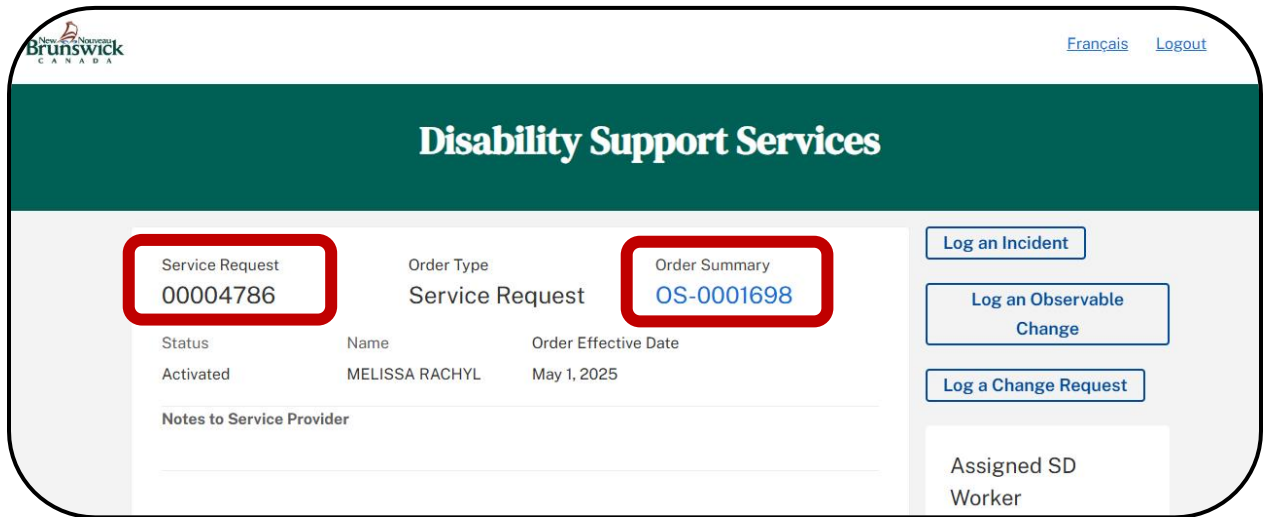
The process for logging service reports, whether an incident, observed change in the client, or adjustments need to be made to an order (*service request*), the processes are the same. Any fields with a **red Asterix (\*)** are mandatory and you must complete them before being able to click submit.

1. Locate and open the applicable Order Summary. Once on the Order Summary, scroll down to the **Order Table** and locate the applicable Order Number but referencing the **Effective Date** column.

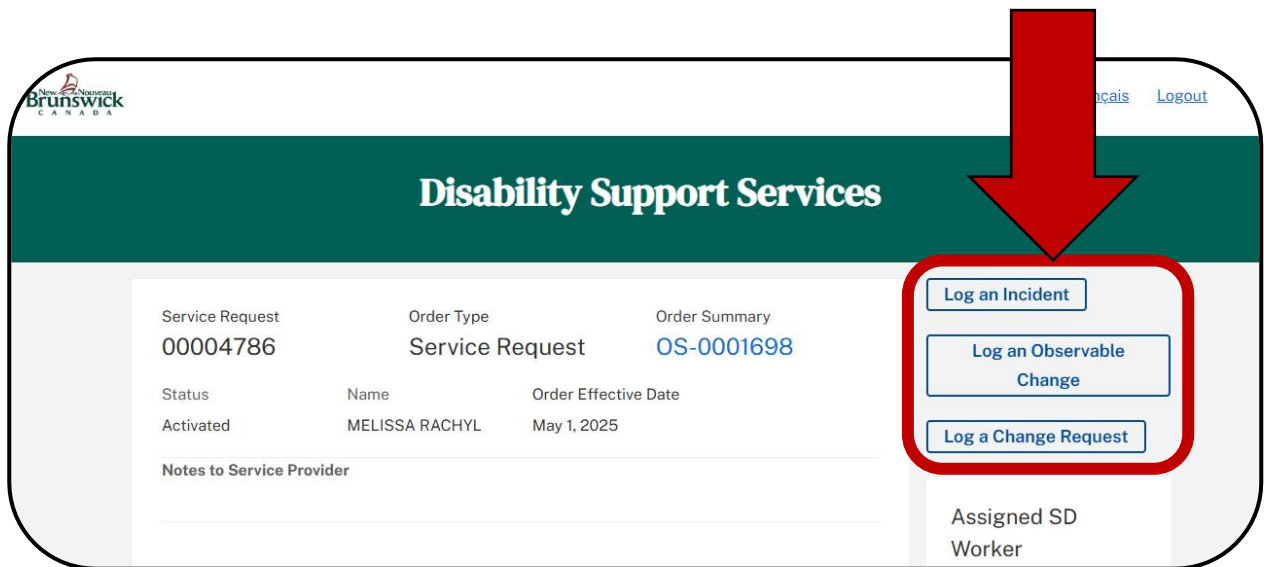
The screenshot shows the 'Order Summary' page. At the top, there are fields for 'Order Summary Start Date' (4/1/2025), 'Order Summary End Date' (7/31/2025), 'Service Name', 'Zone' (Zone Central), 'Created Date' (4/7/2025, 1:46 PM), and 'Last Modified Date' (4/15/2025, 3:07 PM). On the right, the 'Assigned SD Worker' is listed as 'Amy Michaud'. Below this is a table with the following columns: Order Number, Order Effective Date, Status, Order Type, Per, Basic Units, Basic Rate, Kilometre Units, Monthly Other Costs, and Client Contribution. A red box highlights the 'Order Number' and 'Order Effective Date' columns.

Order Number	Order Effective Date	Status	Order Type	Per	Basic Units	Basic Rate	Kilometre Units	Monthly Other Costs	Client Contribution
00004065	April 1, 2025	Activated	Service Request	Week	35	30.09	1,163	150	52
00004283	July 1, 2025	Activated	Service Request	Week	40	30.09	1,163	150	52
00004310	April 1, 2025	Cancelled		Week	10	0	0	0	-52
00004780	April 1, 2025	Activated		Week	5	0	0	0	0
00004797	April 1, 2025	Activated		Week	-5	0	0	0	0
00004786	May 1, 2025	Activated	Service Request	Week	35	30.09	1,163	150	52

2. The Order is displayed with a link to return to the Order Summary (blue text).

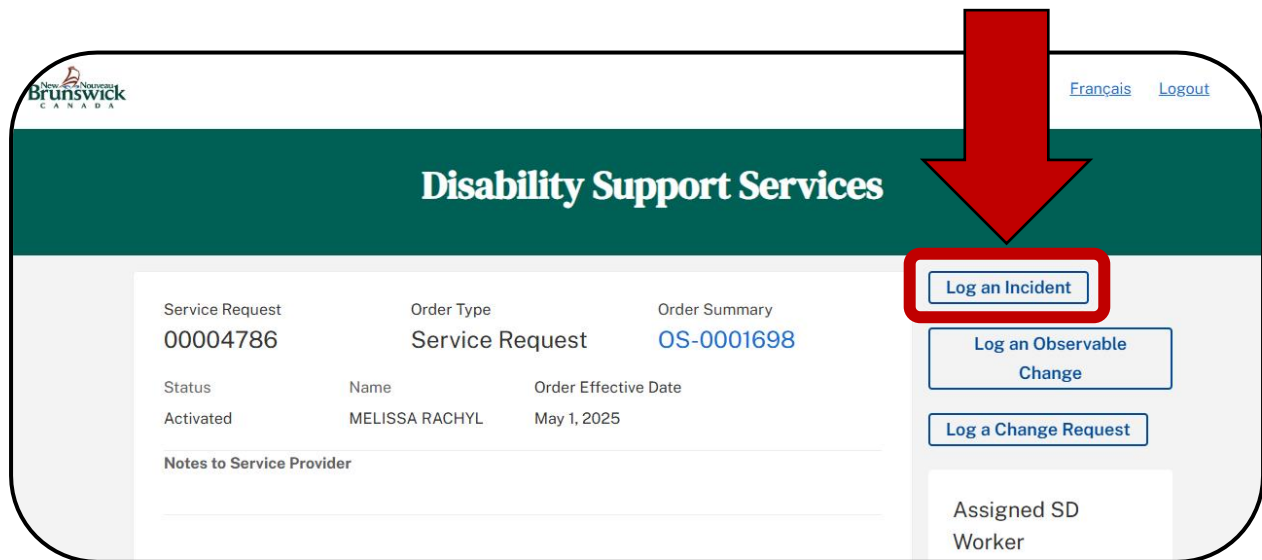


3. The buttons to log service reports are now visible and attached to the correct service period.



## Log an Incident Report (Active or Terminated)

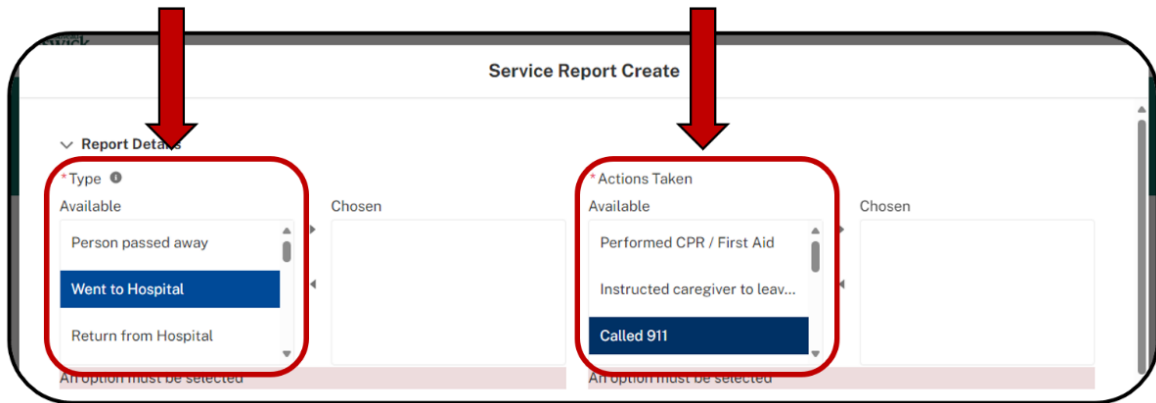
1. Open the Order Summary and locate the relevant Order and Service Period (re: [Where to Log & How to Access Service Reports](#))
2. Once on the Order Details window, select the **Log an Incident** pushbutton. Select the service report type button to be logged.



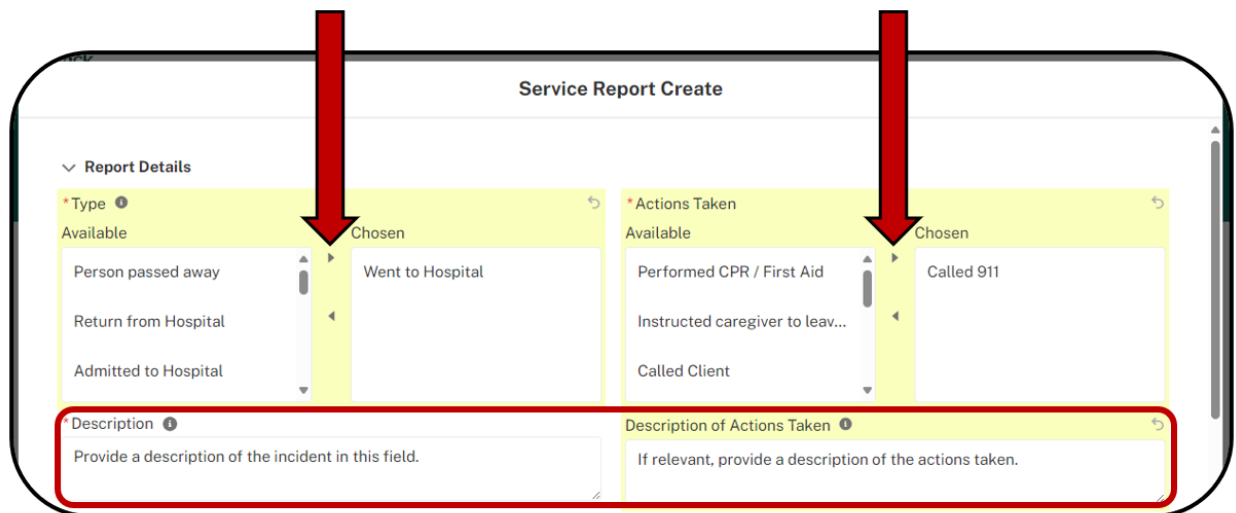
3. A pop-up window will appear where the **Incident** details are captured. All mandatory fields are indicated by a red Asterix (\*).

The 'Service Report Create' form is divided into several sections. The 'Report Details' section includes a dropdown for 'Type' with options: 'Person passed away', 'Went to Hospital', and 'Return from Hospital'. The 'Actions Taken' section includes a dropdown with options: 'Performed CPR / First Aid', 'Instructed caregiver to leave...', and 'Called 911'. There are text input fields for 'Description' and 'Description of Actions Taken'. The 'Urgency' field is a dropdown with '--None--'. The 'Place' field is also a dropdown with '--None--'. The 'Repeated Occurrence' field has a checkbox. The 'Date' and 'Time' fields are separate input boxes, both marked as mandatory with a red asterisk (\*).

4. For the **Type** and **Action Taken** list boxes, the same action will be performed in order to log the incident and action taken. Begin by selecting the relevant item under **Available**.



5. Select the **forward arrow** (▶) located between the Available and Chosen list boxes. Once clicked, the selected Available item will be moved over to **Chosen**. This will have to be done individually for all applicable Type and Action Taken items.



6. The description field for “type” of incident will require a detailed description of the incident (e.g., if **Fall** is selected, describe how and where they fell, and if this has happened before). The Description of Actions Taken field is optional.

**Note:** Items that have been moved to the **Chosen** field can be removed by selecting the item in that field and clicking on the back (◀) arrow.

- Complete the following fields by selecting **Urgency** and **Place** (i.e., where the incident occurred) from the dropdown lists.

The screenshot shows the 'Service Report Create' form. A red box highlights the 'Urgency' and 'Place' dropdown menus. Three red arrows with numbers 1, 2, and 3 point to these dropdowns. The form also includes a 'Description of Place' text area, 'Date' and 'Time' input fields, a 'Repeated Occurrence' checkbox, and a 'Follow-up Required' checkbox. Below these is a 'Further Information' section with 'Reported By' and 'Other People Involved' text areas. A blue 'Next' button is located at the bottom right of the form.

- Complete the **Date** and **Time** fields. Select the **Repeated Occurrence** and **Follow-up Required** checkboxes if applicable. If the Social Development worker should contact the Agency, please select **follow up required**.

The screenshot shows the 'Service Report Create' form with a red box highlighting the 'Repeated Occurrence', 'Date', 'Time', and 'Follow-up Required' fields. Three red arrows with numbers 1, 2, and 3 point to these fields. The rest of the form is the same as in the previous screenshot.

- Indicate who it was **Reported By**, and any other people involved.

A screenshot of a web form titled "Further Information". The form contains two text input fields: "Reported By" (marked with an asterisk and a help icon) and "Other People Involved" (also with a help icon). A blue "Next" button is located at the bottom right of the form area.

**NOTE:** The Client or SD worker’s name do not need to be included. The Incident Report is automatically attached to the client’s order, and the report will go directly to the SD worker assigned to the client.

10. Select the **Next** pushbutton.

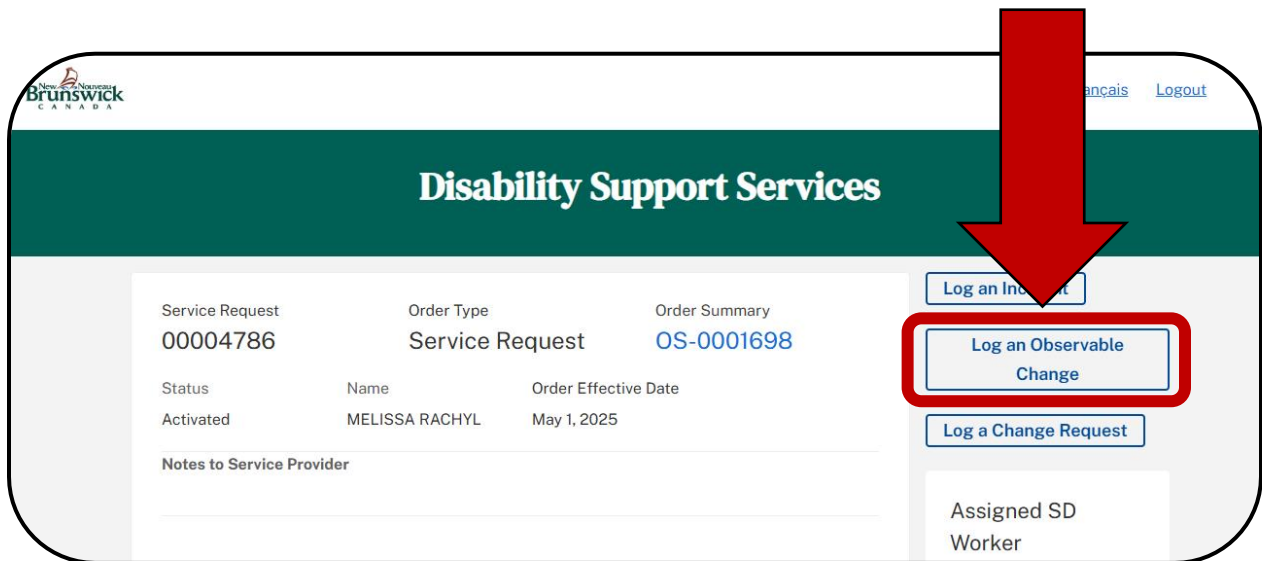
11. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.

A screenshot of a confirmation pop-up window titled "Service Report Create". The message reads: "DSS Create New Service Report (Incident)" and "Thank you, the incident occurring at 2024-02-08, 11:45 a.m. related to has been recorded." A blue "Finish" button is at the bottom right. The window has a close button (X) in the top right corner and a "Showing 25 of 25 items" indicator at the bottom left.

## Log an Observable Change (Active or Terminated)

Observable changes are not incident reports, but other information the service provider feels would help important for SD worker to know. This information can be positive or negative. Observable change template is like an Incident Report. Separating these functions makes it easier for SD workers to triage and respond appropriately.

1. Open the Order Summary and locate the relevant Order and Service Period (re: [Where to Log & How to Access Service Reports](#))
2. Once on the Order Details window, select the **Log an Observable Change** pushbutton.

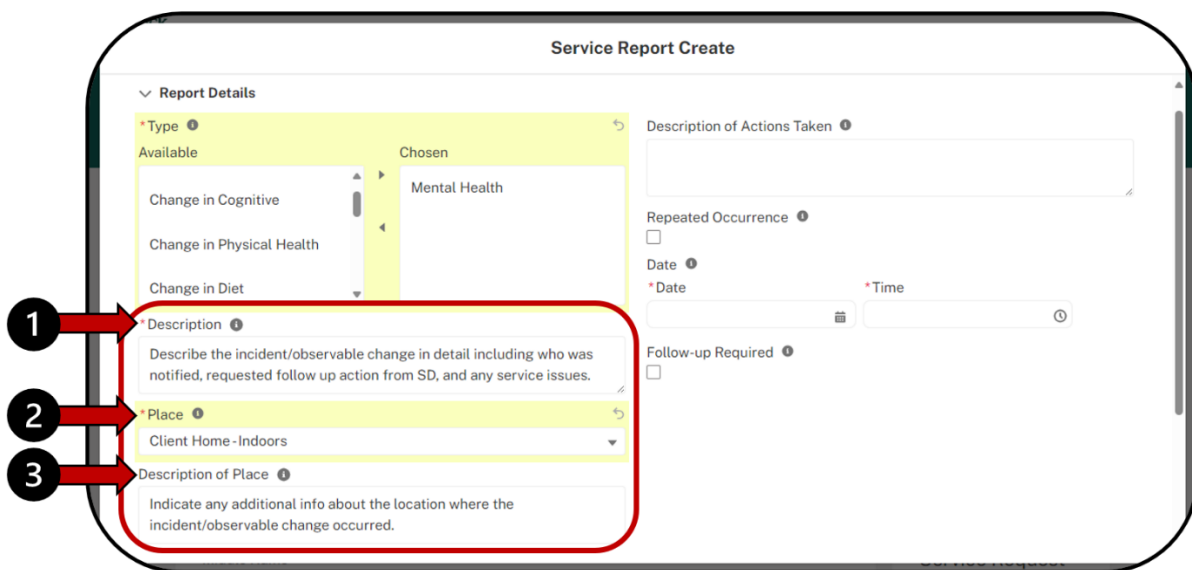


3. A pop-up window will appear where **Observable Change** details are captured. All mandatory fields are indicated by a red Asterix (\*).

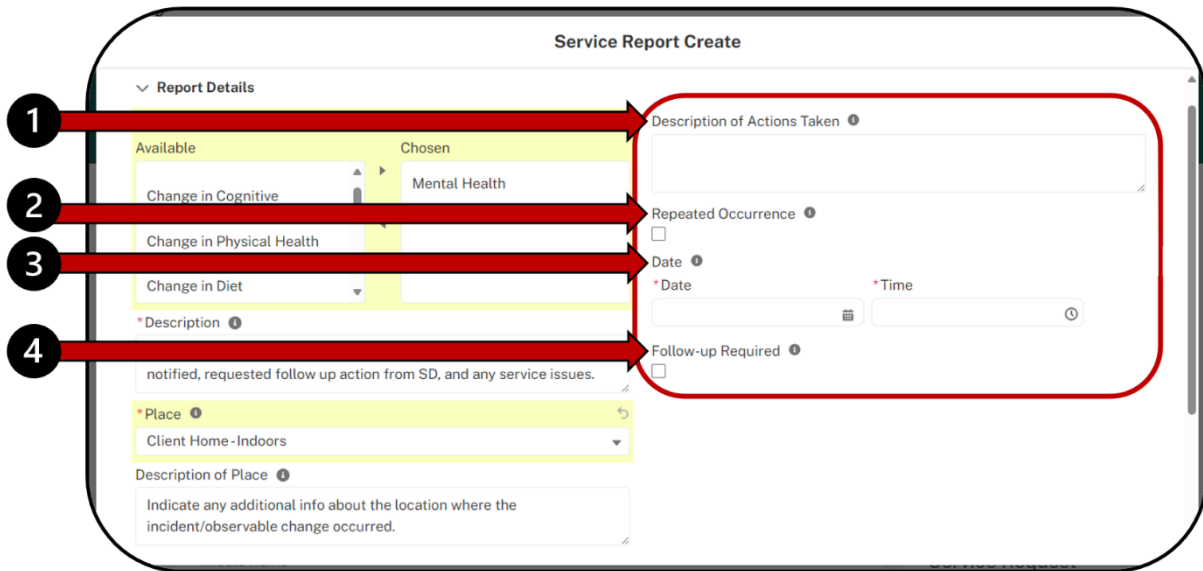
- In the **Type** field, select the **Available** observable change. Once selected, move it to **Chosen** by clicking the **forward arrow** (▶) located between the Available and Chosen list boxes. Once clicked, the selected Available option will be moved over to **Chosen**. Do this individually for all applicable observable changes if more than one applies.



- Provide a detailed **Description** of the observed change including who was notified.
- Indicate where the observed change took **Place** and provide additional information in the **Description of Place** text field.



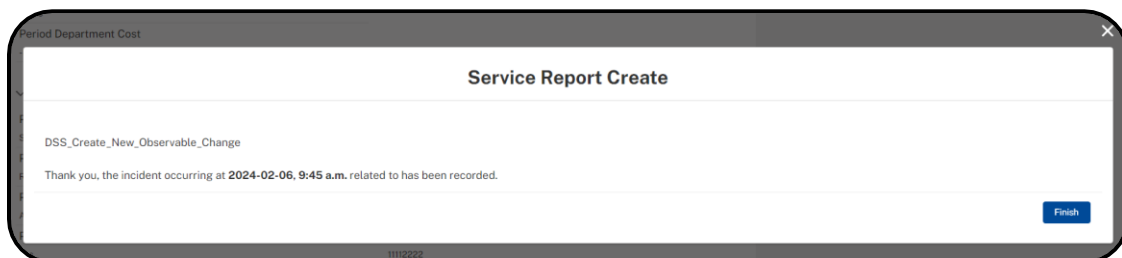
7. Provide a **Description of Actions Taken** if applicable.
8. Capture the **Date** and **Time** of the observable change.
9. If applicable or necessary, select the **Repeated Occurrence** or **Follow-up Required** checkbox.



10. In the **Further Information** section, indicate who the incident was **Reported By** and select the **Next** pushbutton.



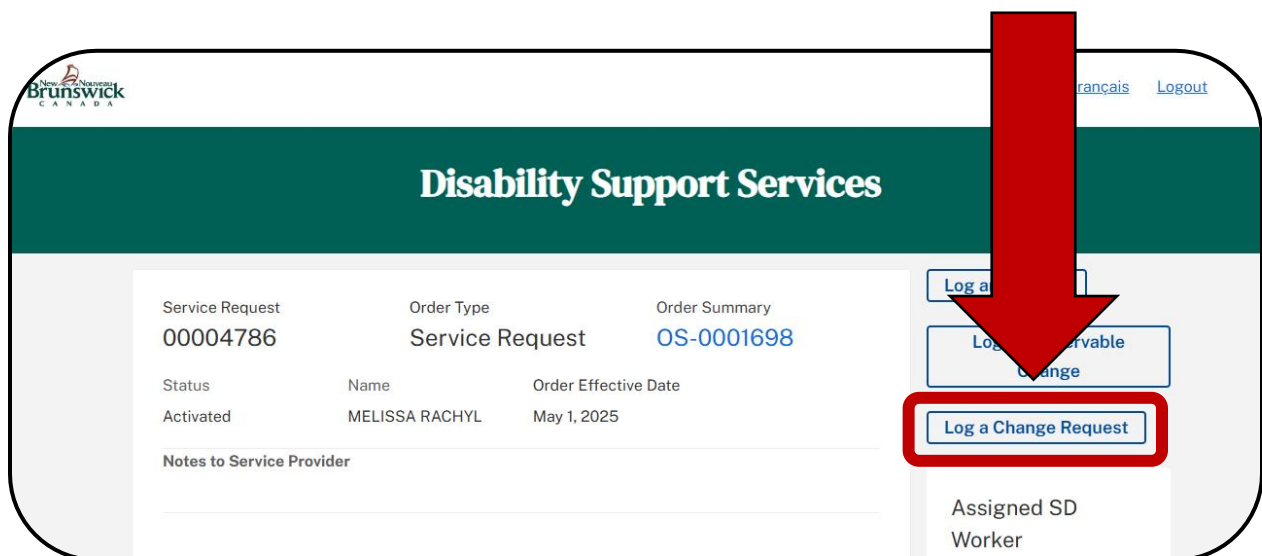
11. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.



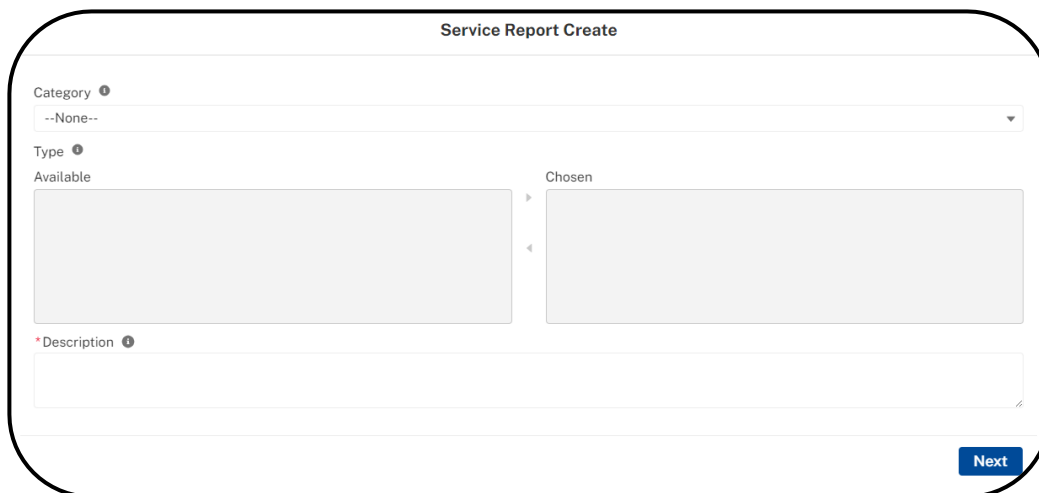
## Log a Change Request

When the need to adjust a client’s service is presented, CommunityCareNB provides Service Providers with the ability to log change requests (i.e., adjust, pause, end) directly to Social Development. For example, the need may arise from a service provider’s observations, at the request of the client, or based on changing needs identified by the SD Worker. This feature is intended to make it easier for service providers to initiate and document the request to change.

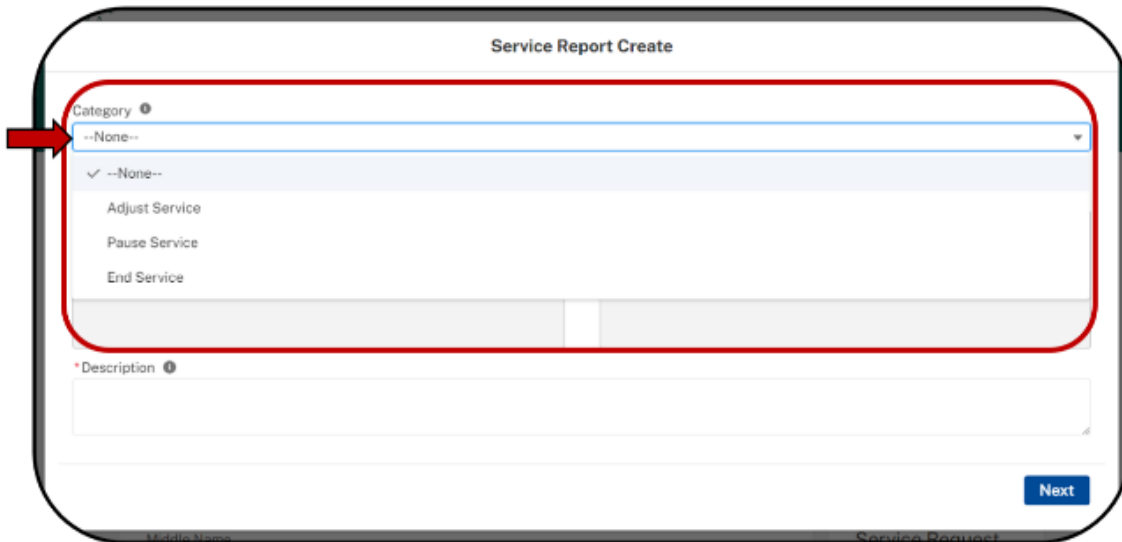
1. Open the Order Summary and locate the relevant Order and Service Period (re: [Where to Log & How to Access Service Reports](#))
1. Once on the Order Details window, select the **Log a Change Request** pushbutton.



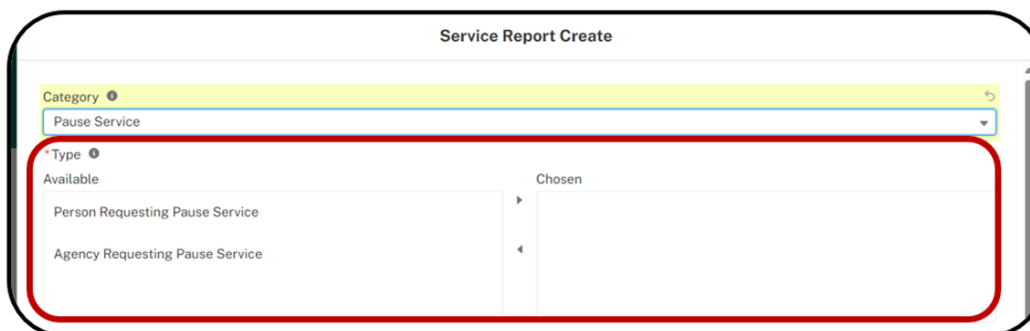
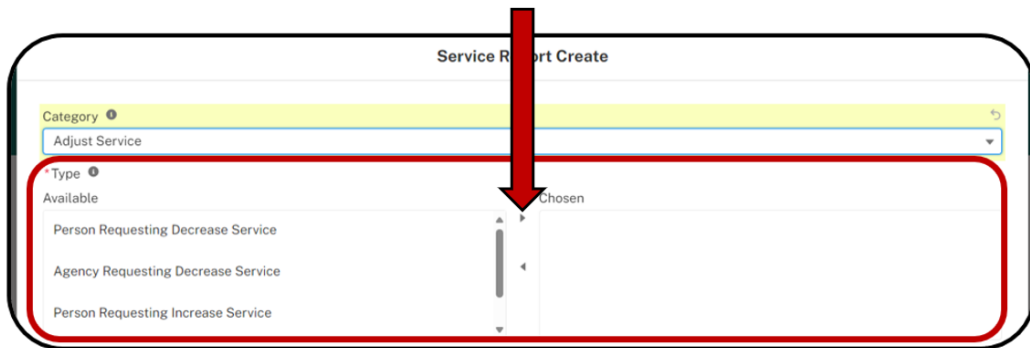
2. A pop-up window will appear where **Change Request** details are captured. All mandatory fields are indicated by a red Asterix (\*).



3. Select the **Category** from the dropdown menu. The available types will populate in accordance with the chosen category.



4. In the **Type** field, select the **Available Change Request Type**. Once selected, move it to **Chosen** by clicking the **forward arrow** (▶) located between the Available and Chosen list boxes. Once clicked, the selected Available option will be moved over to **Chosen**.



The screenshot shows the 'Service Report Create' form. At the top, the 'Category' dropdown is set to 'End Service'. Below it, the '\*Type' dropdown is open, showing two columns: 'Available' and 'Chosen'. Under 'Available', there are two options: 'Person Requesting End Service' and 'Agency Requesting End Service'. The 'Chosen' column is currently empty. A red box highlights the 'Type' selection area.

- 5. Provide a description of the change in detail and the reason for the change request.

The screenshot shows the 'Service Report Create' form. The 'Category' is 'Adjust Service' and the '\*Type' is 'Person Requesting Increase Service'. The 'Available' column contains 'Person Requesting Decrease Service', 'Agency Requesting Decrease Service', and 'Agency Requesting Increase Service'. The 'Chosen' column contains 'Person Requesting Increase Service'. A red arrow points to the '\*Description' field, which contains the text: 'Describe the change in detail and the reason for the change request.' A 'Next' button is visible at the bottom right. A red box highlights the description field.

- 6. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.

The screenshot shows the 'Service Report Create' form with a confirmation message: 'Thank you, the change request occurring at 2024-04-24, 9:56 a.m. related to Isabelle Boulay has been recorded.' A 'Finish' button is located at the bottom right.

## Miscellaneous Request (Cancelled & Terminated)

Once an Order has been Cancelled or Terminated, changes to the request can longer be made however, you do have the ability to log a Miscellaneous Request through the **Log a Request** button.

1. Open the Cancelled or Terminated Order.
2. Once on the Order Summary, scroll down to the **Order Table** and locate the applicable Order Number but referencing the **Effective Date** column.

Terminated Nath Tester

Order Summary Start Date: 2/13/2025  
Order Summary End Date: 2/13/2025

Service Name: Home Support/Personal Care - Soutien a domicile/Soins personnels  
Zone: Zone Central

Created Date: 2/28/2025, 9:44 AM  
Last Modified Date: 2/28/2025, 11:02 PM

Assigned SD Worker: Nath Support Plan Admin

Order Number	Order Effective Date	Status	Order Type	Per	Basic Units	Basic Rate	Kilometre Units	Monthly Other Costs	Client Contribution
00003339		Terminated	Service Request	Month	2	29.47	0	0	0

Service Reports (0)

3. The Order is displayed with a link to return to the Order Summary (blue text).

### Disability Support Services

Service Request: 00003339  
Order Type: Service Request  
Order Summary: OS-0000948

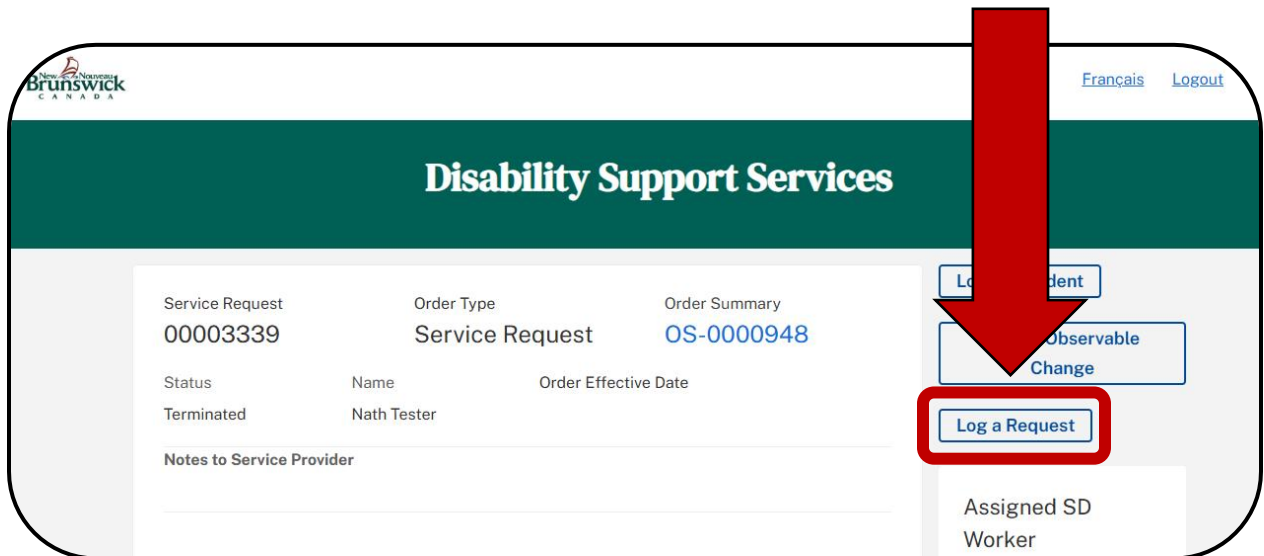
Status: Terminated  
Name: Nath Tester  
Order Effective Date:

Notes to Service Provider:

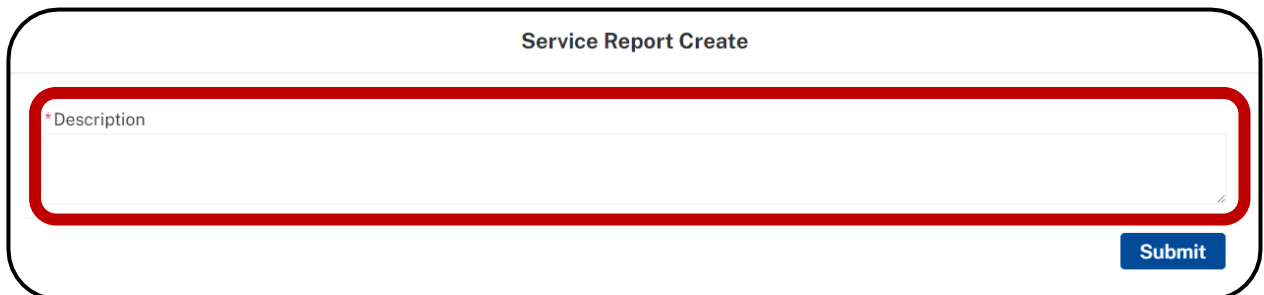
Assigned SD Worker:

Log an Incident  
Log an Observable Change  
Log a Request

- Click the **Log a Request** button.

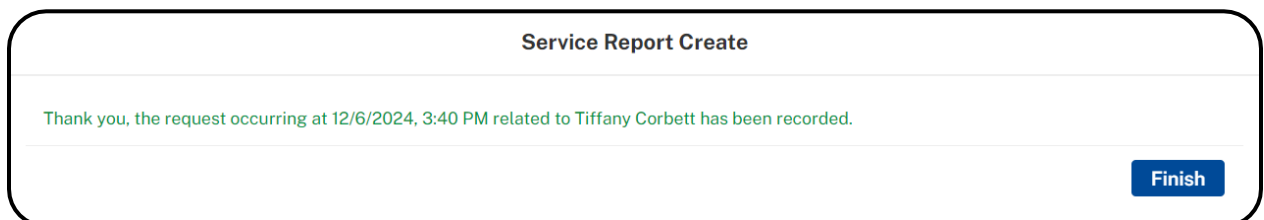


- Capture the request description relating to the cancelled or terminated order and press **submit**.



- A confirmation message is displayed.

- Click **Finish**.



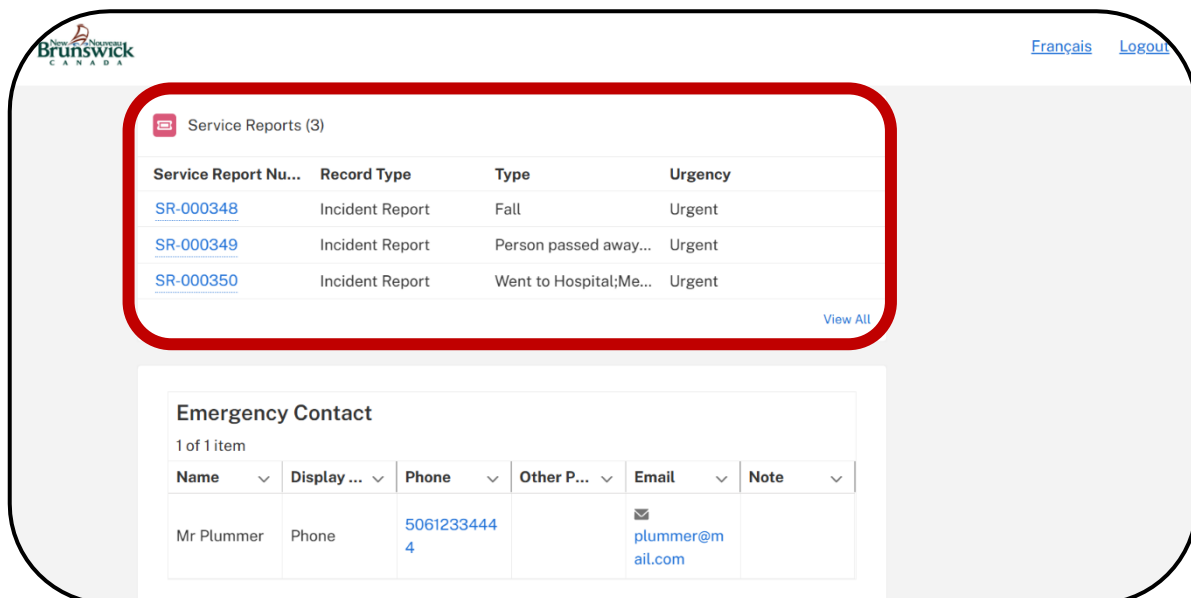
## Logged Service Reports

Whenever an Observable Change or Incident is logged, the service report can be accessed either through an individual's order or through the Service Reports tile on the Homepage. This also applies to Change Requests that have been logged on behalf of the client or by the agency.

### View Service Report from Order Summary

When searching for a specific client's Service Report, the most efficient way is to access the Service Report(s) through their individual order summary. This will only display service reports related to the individual order summary.

1. Navigate to and open the applicable client Order Summary (re: [View Offered Orders](#))



The screenshot shows the 'Service Reports (3)' section of an order summary. A red box highlights the table containing three incident reports. Below the table is an 'Emergency Contact' section for Mr. Plummer.

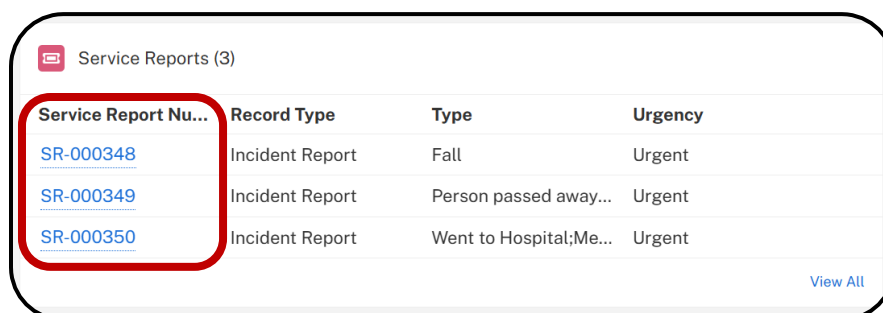
Service Report Nu...	Record Type	Type	Urgency
<a href="#">SR-000348</a>	Incident Report	Fall	Urgent
<a href="#">SR-000349</a>	Incident Report	Person passed away...	Urgent
<a href="#">SR-000350</a>	Incident Report	Went to Hospital;Me...	Urgent

View All

**Emergency Contact**  
1 of 1 item

Name	Display ...	Phone	Other P...	Email	Note
Mr Plummer	Phone	5061233444 4		plummer@mail.com	

2. Once on the Order Summary, scroll down and locate the **Service Reports** field.
3. Click the applicable **Service Report Number** hyperlink.

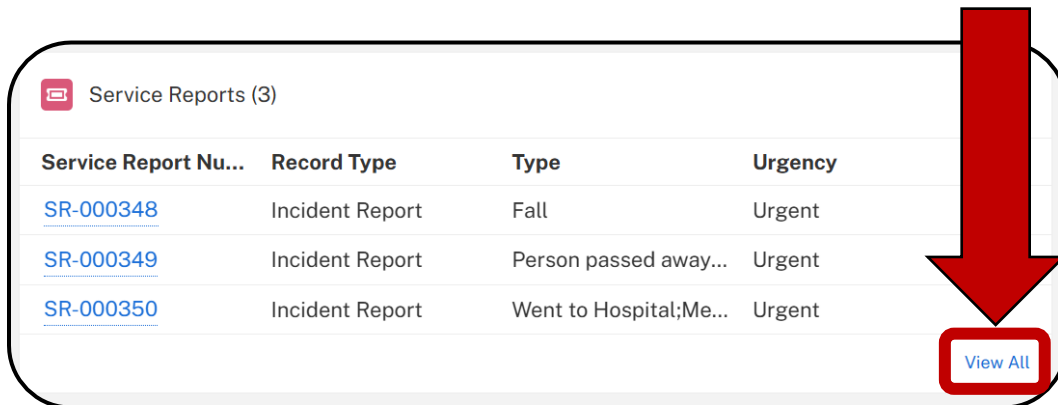


This is a close-up of the 'Service Reports (3)' table. A red box highlights the first row, which contains the service report number 'SR-000348'.

Service Report Nu...	Record Type	Type	Urgency
<a href="#">SR-000348</a>	Incident Report	Fall	Urgent
<a href="#">SR-000349</a>	Incident Report	Person passed away...	Urgent
<a href="#">SR-000350</a>	Incident Report	Went to Hospital;Me...	Urgent

View All

4. The **Service Report** is displayed.
5. To see all Service Reports relating to the service request, click the **View All** button.



The screenshot shows a user interface for 'Service Reports (3)'. It contains a table with three columns: 'Service Report Nu...', 'Record Type', and 'Urgency'. The table lists three incident reports, all with 'Urgent' status. A large red arrow points from the top right towards a 'View All' button located at the bottom right of the table.

Service Report Nu...	Record Type	Type	Urgency
<a href="#">SR-000348</a>	Incident Report	Fall	Urgent
<a href="#">SR-000349</a>	Incident Report	Person passed away...	Urgent
<a href="#">SR-000350</a>	Incident Report	Went to Hospital;Me...	Urgent

[View All](#)

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## Notifications

A notification will be sent to the Service Provider when a change to a service request status has been made. An Email will be sent for the following status changes:

- **Offered:** When an SD Worker offers an Order, the Service Provider will be notified via an email stating: “There is a new Service Request offer, please log into the portal to view”. A link to the record is included in the email.
- **Activated:** Any time a change has been made to an Order Summary, the Service Provider will be notified via an email stating: “There is a new Service Request activation, please log into the portal to view”. A link to the record is included in the email.
- **Rescinded:** If an SD Worker rescinds a service request after it has been offered, the Service Provider will be notified via an email stating: “Please note, a service request you received (see order number below) is no longer available. This service request will **no longer** be visible in your ‘pending’ tab.”
- **Cancelled:** If an SD Worker cancels an order after it has been offered, the Service Provider will be notified via an email stating: “Please note, a service request you received (see order number below) has been cancelled and is no longer available.”

**NOTE:** Unlike rescinded service requests, cancelled service requests are still visible to the Service Provider via the **Cancelled** tab on the Service Request page. Cancelled Service Request can still be billed against for the time it was active.

- **Terminated:** If an SD Worker terminates a service request, the Service Provider will be notified via an email stating: “There is a new Service Request termination, please log into the portal to view.” A link to the terminated record is found in the email.

**NOTE:** Unlike rescinded service requests, cancelled service requests are still visible to the Service Provider via the **Terminated** tab on the Service Request page.

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## Service Delivery Dashboard

The Service Delivery Dashboard provides insight into service requests and service reports. This dashboard consolidates data into various report types such as all/new/active/terminated/expiring service requests, mileage, service reports and more much more!

**IMPORTANT:** The Service Request Dashboard is currently in Beta, meaning that it is in full testing and feedback is greatly appreciated.

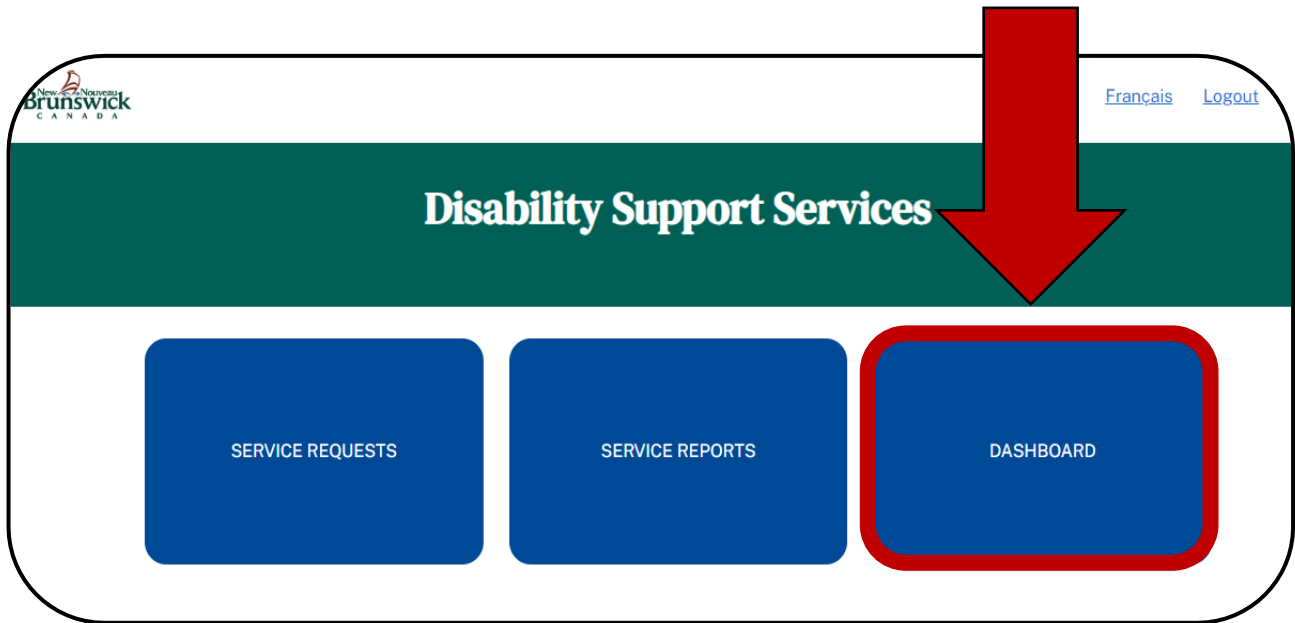
## Service Delivery Reports

From this dashboard, the Service Provider can view:

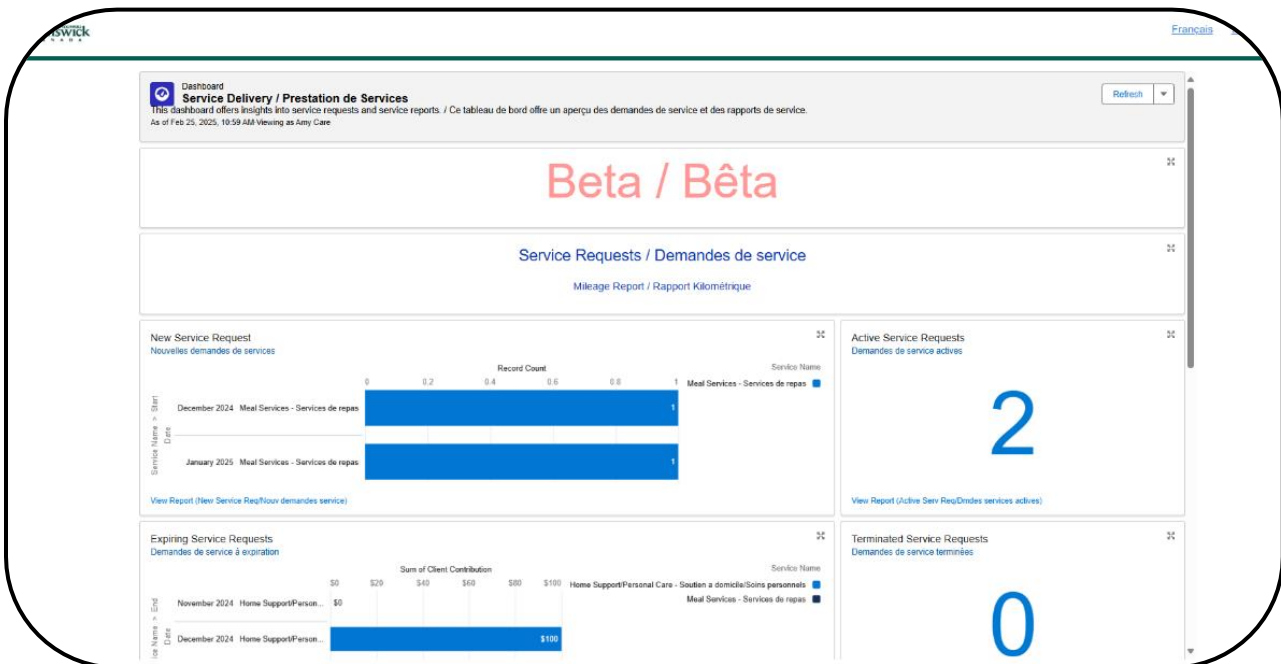
- **Service Requests:** Report details of all service requests of basic cost type from last 120 days, grouped by status & Service Name with additional filters.
- **Mileage Report:** Report details all service requests of kilometer cost type from last 120 days, grouped by status & Service Name with additional filters.
- **New Service Requests:** Report details of all new service requests within the last 30 days.
- **Expiring Service Request:** Report details of all expiring service request within the next 30 days.
- **Active Service Requests:** Report details of all active service requests. A record count is displayed on the dashboard.
- **Terminated Service Requests:** Report details of all terminated service requests. A record count is displayed on the dashboard.
- **Service Reports:** Report details of all service reports from last 120 days, grouped by date & Service Report: Record Type with additional features.
- **Recent Incidents:** Bar chart displaying recent incidents in the last 90 days.
- **Recent Observable Changes:** Bar chart displaying recent observable changes in the last 90 days.
- **Recent Change Requests:** Bar chart displaying recent change requests in the last 90 days.
- **Recent Miscellaneous Requests:** Bar chart displaying recent miscellaneous requests in the last 90 days.

## Navigate to Service Request Dashboard

1. From the **Homepage**, click on the **Dashboard** tile.



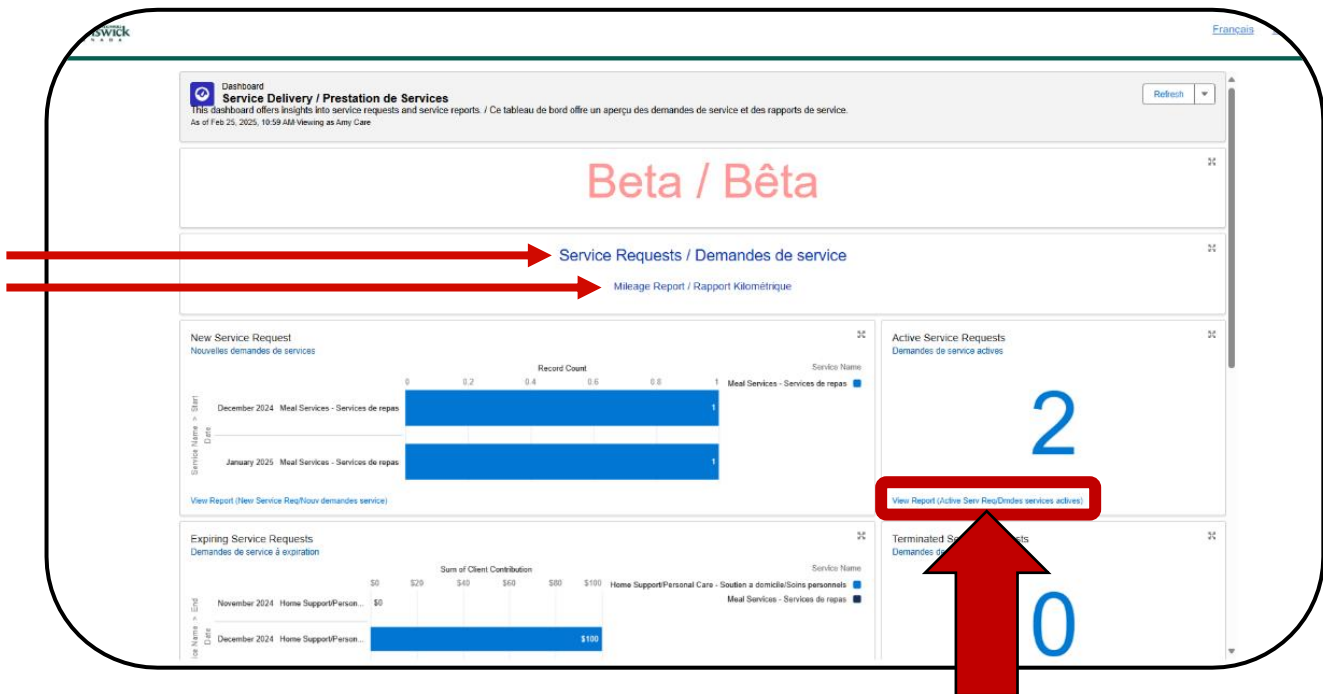
2. The **Service Delivery Dashboard** is displayed.



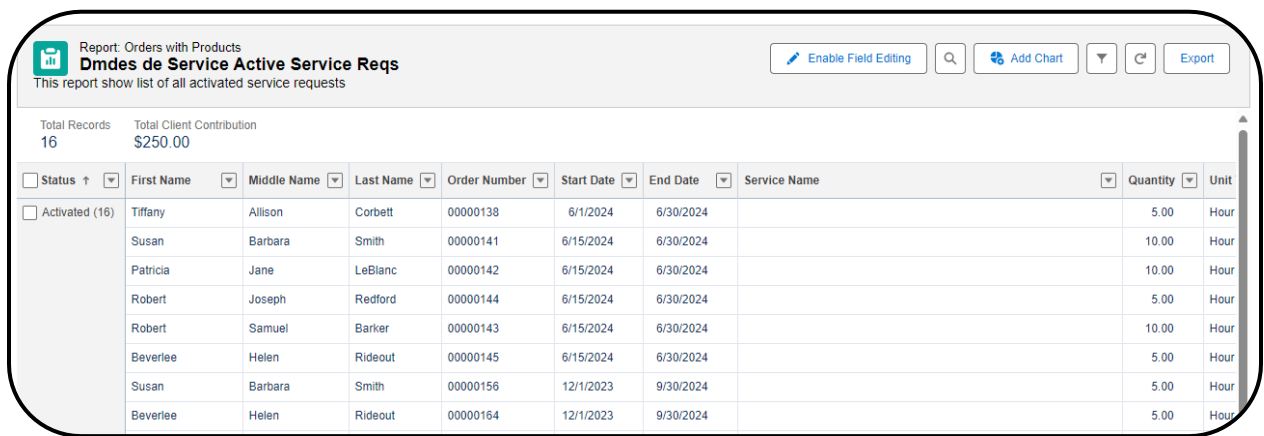
## View Reports from Dashboard

From the Dashboard, the Care Coordinator is able to view individual details related to the displayed report types. By clicking on a **title or “view report” link** the Care Coordinator is able to view individualized and additional items that may not be displayed on the dashboard, as well export report details.

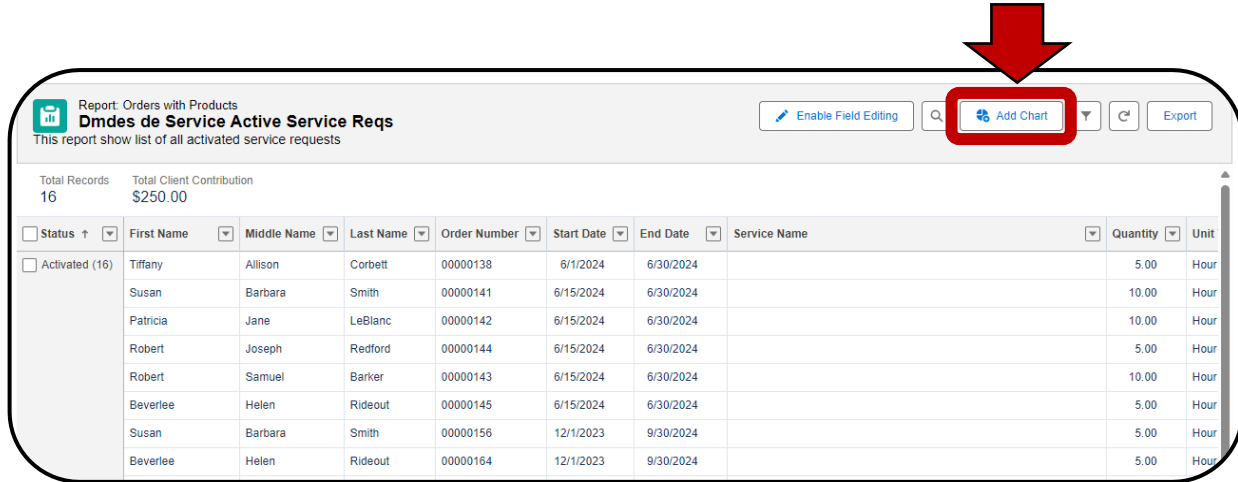
1. From the **Service Delivery Dashboard**, locate the applicable report type to view. The **View Report** hyperlink can be found at the bottom of any of the individual fields.



2. Once in the applicable **Report** window, a full list of related report items is displayed.



3. To add a chart to the report, click the **Add Chart** button.



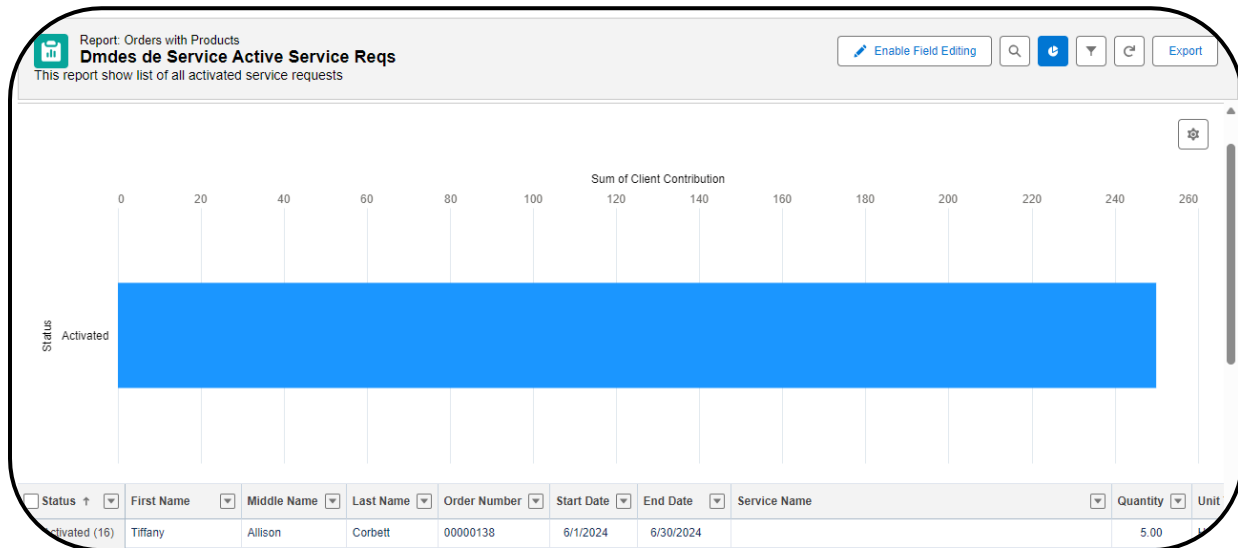
Report: Orders with Products  
**Dmdes de Service Active Service Reqs**  
This report show list of all activated service requests

Enable Field Editing | Add Chart | Export

Total Records: 16 | Total Client Contribution: \$250.00

Status	First Name	Middle Name	Last Name	Order Number	Start Date	End Date	Service Name	Quantity	Unit
Activated (16)	Tiffany	Allison	Corbett	00000138	6/1/2024	6/30/2024		5.00	Hour
	Susan	Barbara	Smith	00000141	6/15/2024	6/30/2024		10.00	Hour
	Patricia	Jane	LeBlanc	00000142	6/15/2024	6/30/2024		10.00	Hour
	Robert	Joseph	Redford	00000144	6/15/2024	6/30/2024		5.00	Hour
	Robert	Samuel	Barker	00000143	6/15/2024	6/30/2024		10.00	Hour
	Beverlee	Helen	Rideout	00000145	6/15/2024	6/30/2024		5.00	Hour
	Susan	Barbara	Smith	00000156	12/1/2023	9/30/2024		5.00	Hour
	Beverlee	Helen	Rideout	00000164	12/1/2023	9/30/2024		5.00	Hour

4. A visual representation of the report data will appear as a bar chart.



Report: Orders with Products  
**Dmdes de Service Active Service Reqs**  
This report show list of all activated service requests

Enable Field Editing | Add Chart | Export

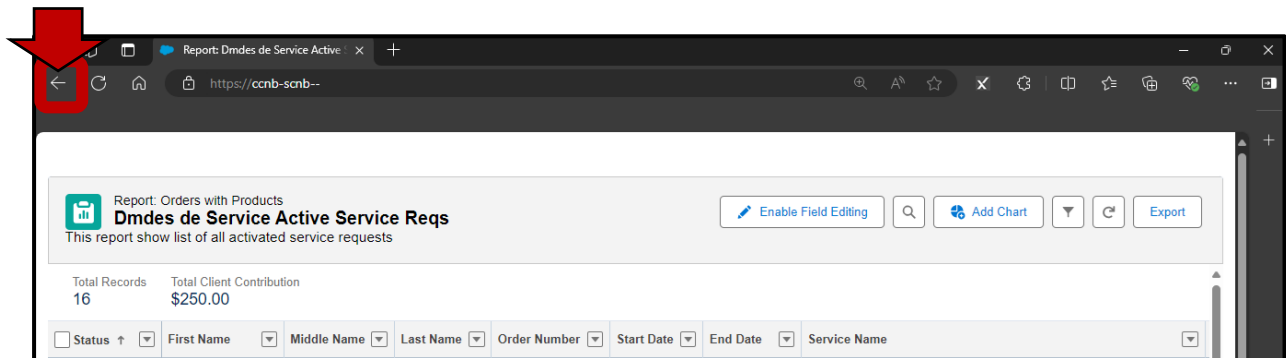
Sum of Client Contribution

0 20 40 60 80 100 120 140 160 180 200 220 240 260

Status: Activated

Status	First Name	Middle Name	Last Name	Order Number	Start Date	End Date	Service Name	Quantity	Unit
Activated (16)	Tiffany	Allison	Corbett	00000138	6/1/2024	6/30/2024		5.00	Hour

5. To return to the Service Request dashboard, click the **Go Back** arrow on the browser.



Report: Orders with Products  
**Dmdes de Service Active Service Reqs**  
This report show list of all activated service requests

Enable Field Editing | Add Chart | Export

Total Records: 16 | Total Client Contribution: \$250.00

Status	First Name	Middle Name	Last Name	Order Number	Start Date	End Date	Service Name	Quantity	Unit
Activated (16)	Tiffany	Allison	Corbett	00000138	6/1/2024	6/30/2024		5.00	Hour

## Export Reports

In any of the reports found on the Service Request Dashboard, the Care Coordinator has the ability to export when viewing all the details of a report type. It is recommended that the file be exported as an XLSX, XLS, or CSV file (see below).

1. From the report details window, select the **Export** button.

Report: Orders with Products  
**Dmdes de Service Active Service Reqs**  
 This report show list of all activated service requests

Enable Field Editing | Add Chart | **Export**

Total Records: 16 | Total Client Contribution: \$250.00

Status	First Name	Middle Name	Last Name	Order Number	Start Date	End Date	Service Name	Quantity	Unit
Activated (16)	Tiffany	Allison	Corbett	00000138	6/1/2024	6/30/2024		5.00	Hour
	Susan	Barbara	Smith	00000141	6/15/2024	6/30/2024		10.00	Hour
	Patricia	Jane	LeBlanc	00000142	6/15/2024	6/30/2024		10.00	Hour
	Robert	Joseph	Redford	00000144	6/15/2024	6/30/2024		5.00	Hour
	Robert	Samuel	Barker	00000143	6/15/2024	6/30/2024		10.00	Hour
	Beverlee	Helen	Rideout	00000145	6/15/2024	6/30/2024		5.00	Hour
	Susan	Barbara	Smith	00000156	12/1/2023	9/30/2024		5.00	Hour
	Beverlee	Helen	Rideout	00000164	12/1/2023	9/30/2024		5.00	Hour

2. The **Export** popup window is displayed.
3. Select the **Details Only** tile. *Optional: select the format type.*

Export view

**Formatted Report**

Export the report, including the report header, groupings, and filter settings.

**Details Only**

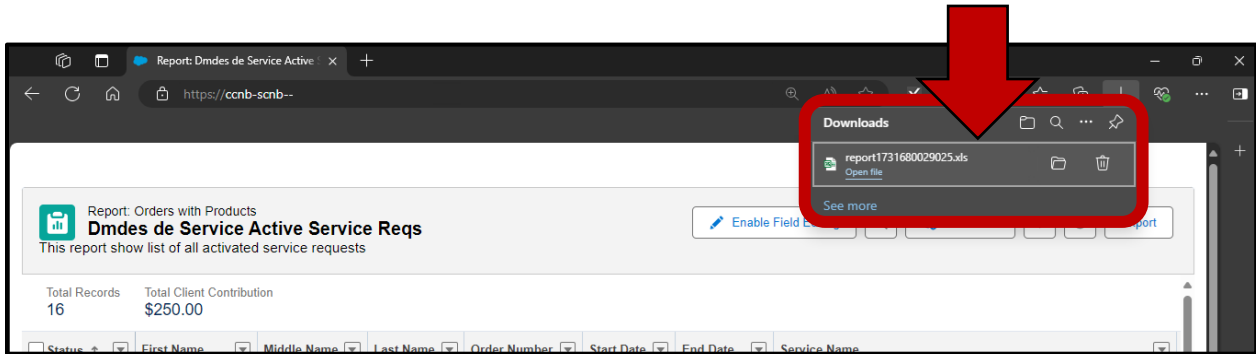
Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format: Excel Format .xls (dropdown menu open showing: Excel Format .xls, Excel Format .xlsx, Comma Delimited .csv)

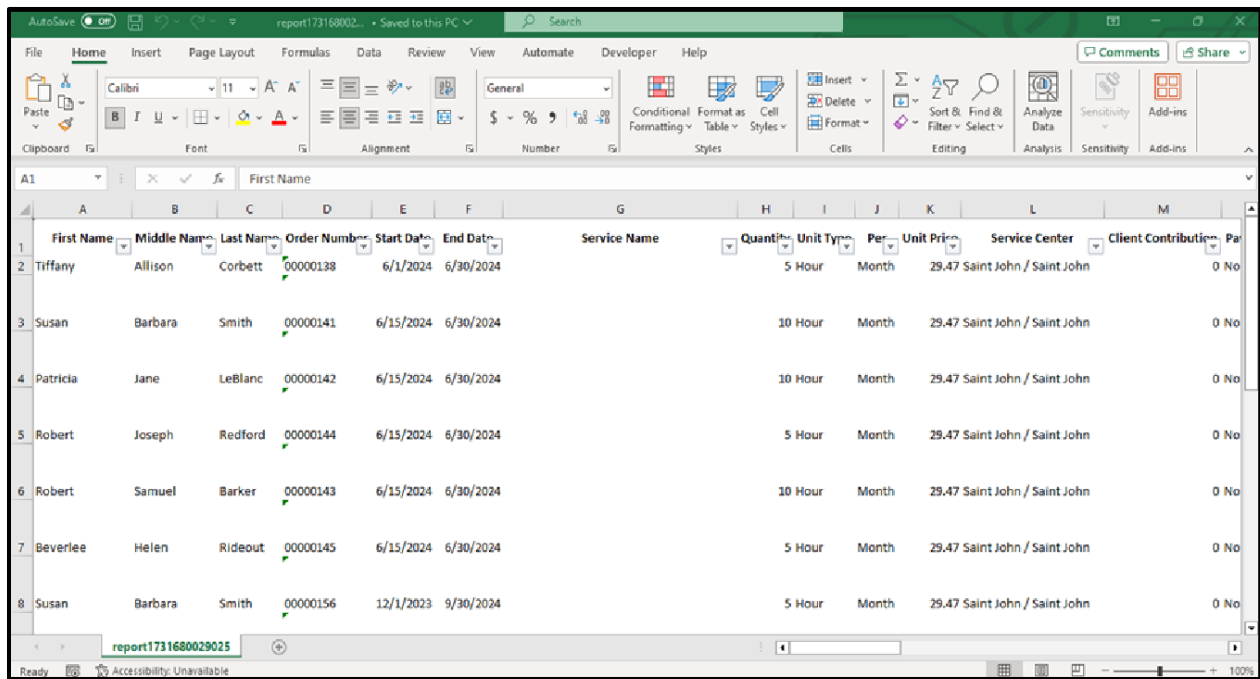
Encoding: ISO-8859-1 (General US & We:)

Cancel Export

4. Once the **Details** and **Format** are select, click the **Export** button.
5. The page Reloads and the **Downloads** window is displayed with the exported report.
6. Click the report to open the Excel spreadsheet.



7. The Report is displayed and can now be printed or saved.



## Refresh Data

If newly captured information is not displayed on the dashboard, or if the user wants to ensure that the most updated version is displayed, clicking the **Refresh** button reload and update all information displayed on the dashboard. This button must be used as the refresh button on the browser will not update the information.

