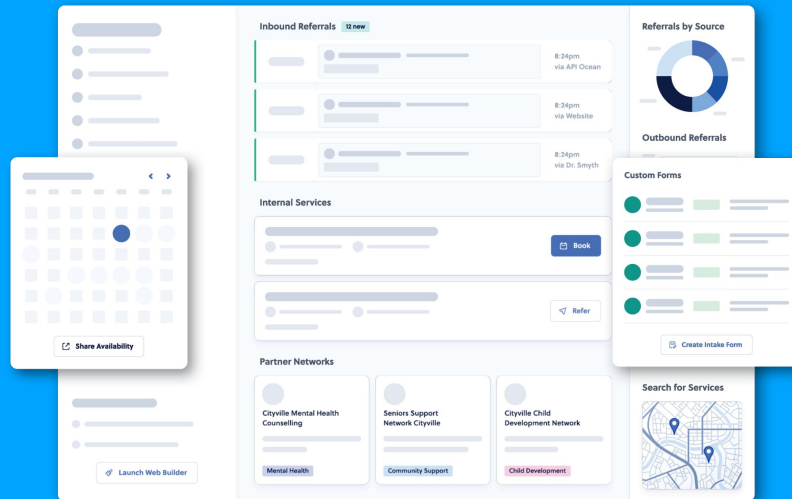


caredove & AccessCSS

February 5, 2025
AccessCSS Community Partners





What is Caredove



10+

Years of experience
beautifying access



1000+

Organizations
using Caredove



50+

Thriving regional
initiatives



500K/yr

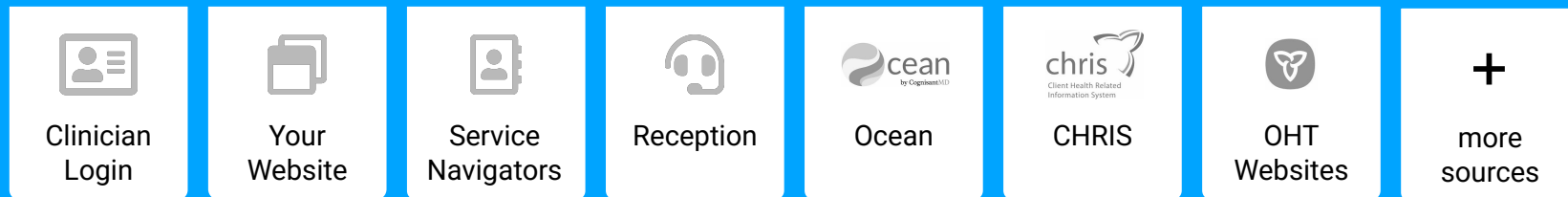
Referrals received
through Caredove

**All in one
access
management
solution**

**eReferral & service navigation solution
focused on seniors, mental health and
children's community services**

- Improve service access across a region
- Reduce administrative tasks for staff
- Custom assessment & intake forms
- HL7 FHIR integrations
- PHIPA, PIPEDA & HIPAA secure

Many Channels. One Inbox



Your Caredove Service Listing

Update service details in
one place, receive referrals
from many.

DOVE
Community Support Services

Agency referral inbox

Acme Health Services English John Klausnitzer

Home Calendar Tasks Requests Services Workshops Reports Search Sites Web Builder Networks Clients

Received	Client	Service	From	Source	Appointment	Status
1.5 hrs ago	L Andrews	Adult Brief Counselling	Public Sign Up	via website	Sept 8, 2020, 9:45 am	Booked
5 hrs ago	M Martin	Adult Brief Counselling	Tracy Kent St. Joe's Hospital	via search site	Sept 8, 2020, 10:45 am	Booked
Sept 2, 2020	G House	Cognitive Behavioural...	Debbie Johnson North East LHN	via CHRIS	Sept 3, 2020, 1:15 pm	Closed - Admitted
Sept 2, 2020	J Freeman	Youth Day Treatment	Dr. Ronald Richards	via Ocean	Sept 3, 2020, 9:00 am	Closed - Ineligible
Sept 1, 2020	E Davids	Psychotherapy Intake	Public Sign Up	via organic	Sept 4, 2020, 11:45 am	Closed - Admitted



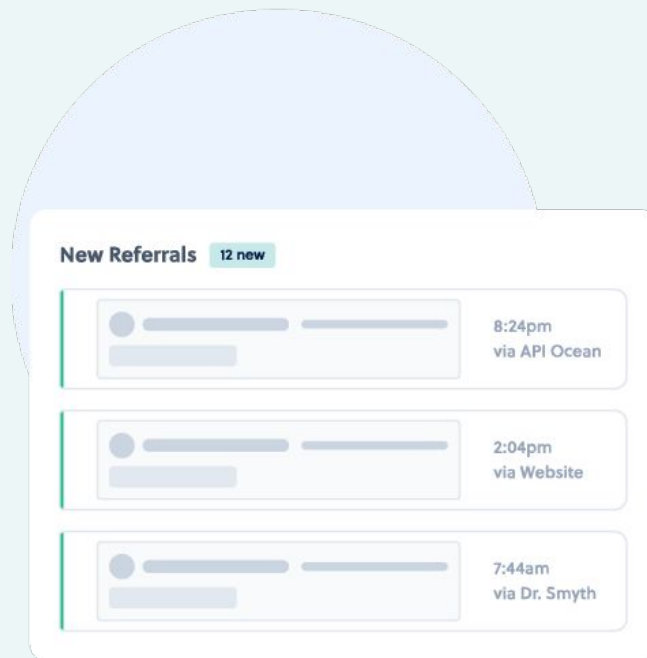
Reporting in Caredove

Improve service access and referral handling efficiency

What to Expect

- 1. Referrals - In/Out** Get the outcome → CLOSED!
- 2. Predefined Reports** Roll through most common
- 3. Raw Data** Key to answering your unique questions
- 4. Pivot table** Manipulate data in key referral fields
- 5. Permissions** Housekeeping your users from permissions report
- 6. Questions**

The Referral Inbox & Outbox



Navigating the Referral Inbox

Referrals - Dove Community Support Services

Inbox

Outbox

Audit

Inbox

Any Calendar

Search



View incoming referrals to this organization

To: Any Provider

State: All

Submitted

Booked

Closed

Unread

Archived

Action

Received	Registrant	Service	From	Status	Appointment <input type="checkbox"/> upcoming only	Workflow
4 days ago	Edward JONES	Meals on Wheels	Registrant Sign Up	Booked Ready	Feb 27, 10:00AM with Robin McBird	
4 days ago	Vicki ROY	Meals on Wheels	Tessa Smith-Moore Caredove	Booked Ready	Feb 27, 2:00PM with Robin McBird	
5 days ago	Thomas STRONG	Meals on Wheels	Registrant Sign Up	Booked Received	Feb 13, 2:00PM with Robin McBird	
9 days ago	Sally WILSON	Meals on Wheels	Tessa Smith-Moore Caredove	Booked Ready	Feb 13, 10:00AM with Robin McBird	
11 days ago	Stuart LITTLE	Meals on Wheels	Registrant Sign Up	Closed Admitted	Feb 03, 2:00PM with Ann Perkins	
14 days ago	Brenda THOMAS	Meals on Wheels	Tessa Smith-Moore Caredove	Booked Ready	Feb 11, 2:00PM with Robin McBird	
17 days ago	Joe THOMPSON	Meals on Wheels	Tessa Smith-Moore Caredove	Closed Ineligible (h)	Feb 04, 2:00PM with Robin McBird	
30 days ago	Nancy DREW	Meals on Wheels	Tessa Smith-Moore Caredove	Closed Ineligible (h)	No Provider	
1.2 mos ago	Johnny LETHEM	Mariposa Day Program	Jules Roebbelen Caredove	Closed Admitted	No Provider	

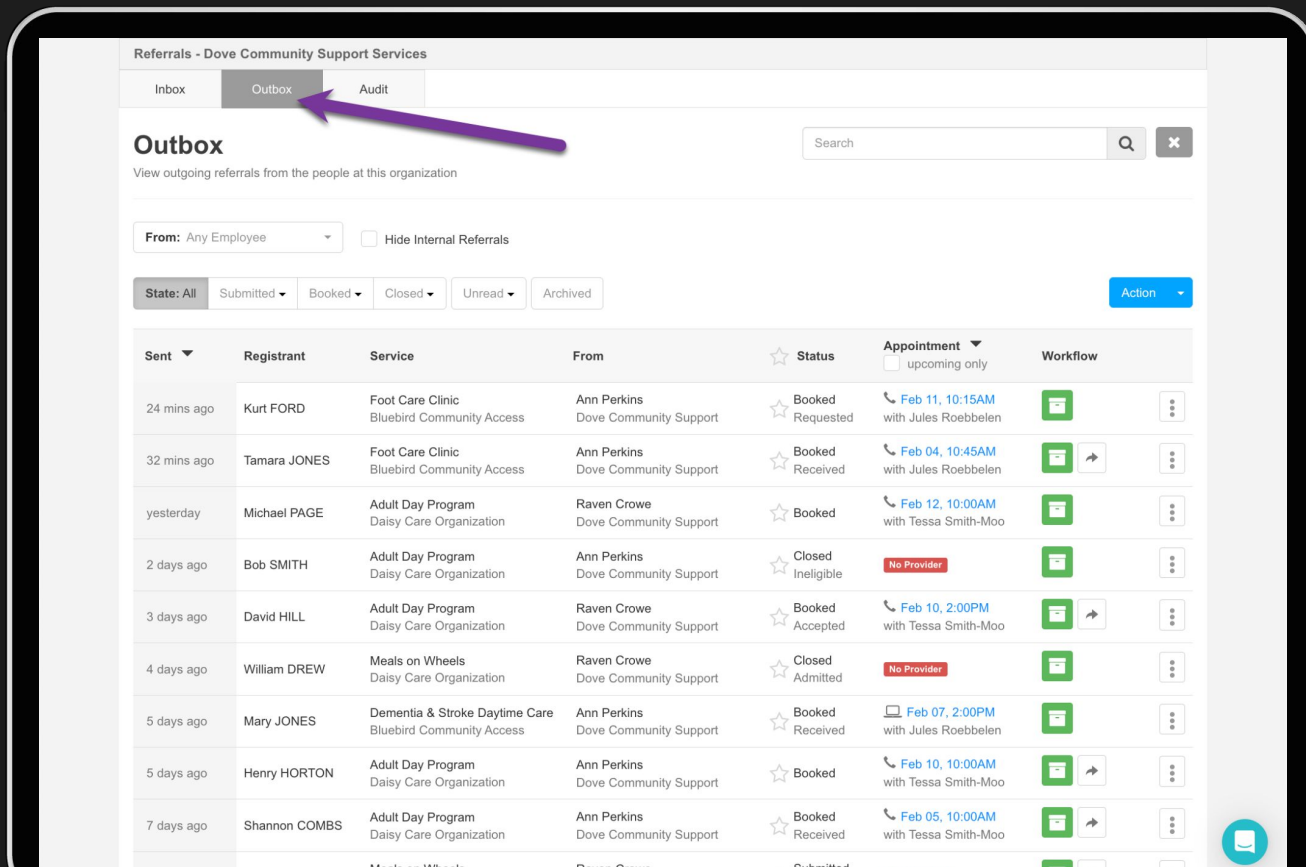
The Referral Inbox - A Report In Itself

The screenshot displays the 'Referrals - Dove Community Support Services' interface. The 'Inbox' tab is selected, showing a list of referrals. A purple arrow points to the 'Closed' dropdown menu, which is open, revealing a list of status options: Completed, Admitted, Rejected, Ineligible (Not Senior), Cancelled, Cancelled by Provider (Event), Cancelled by Provider (Group), Cancelled by Registrant, Service Declined, Failed, No Show, Error, and Entered in Error. The main table lists referrals with columns for Received, Registrant, Status, Appointment, and Workflow. The 'Status' column shows various states like 'Booked Ready', 'Booked Received', 'Closed Admitted', and 'Closed Ineligible'. The 'Appointment' column shows dates and times, and the 'Workflow' column shows icons for different actions.

Received	Registrant	Status	Appointment	Workflow
4 days ago	Edward JONES	Booked Ready	Feb 27, 10:00AM with Robin McBird	[Icons]
4 days ago	Vicki ROY	Booked Ready	Feb 27, 2:00PM with Robin McBird	[Icons]
5 days ago	Thomas STRONG	Booked Received	Feb 13, 2:00PM with Robin McBird	[Icons]
9 days ago	Sally WILSON	Booked Ready	Feb 13, 10:00AM with Robin McBird	[Icons]
11 days ago	Stuart LITTLE	Closed Admitted	Feb 03, 2:00PM with Ann Perkins	[Icons]
14 days ago	Brenda THOMAS	Booked Ready	Feb 11, 2:00PM with Robin McBird	[Icons]
17 days ago	Joe THOMPSON	Closed Ineligible	Feb 04, 2:00PM with Robin McBird	[Icons]
30 days ago	Nancy DREW	Closed Ineligible	No Provider	[Icons]
1.2 mos ago	Johnny LETHEM	Closed Admitted	No Provider	[Icons]

Using the status dropdowns - understand what state your referrals are in

Track Sent Referrals from the Outbox



Referrals - Dove Community Support Services























Inbox **Outbox** Audit

Outbox

View outgoing referrals from the people at this organization

From: Any Employee ☐ Hide Internal Referrals

State: All Submitted Booked Closed Unread Archived Action

Sent	Registrant	Service	From	Status	Appointment	Workflow
24 mins ago	Kurt FORD	Foot Care Clinic Bluebird Community Access	Ann Perkins Dove Community Support	Booked Requested	Feb 11, 10:15AM with Jules Roebbelen	 
32 mins ago	Tamara JONES	Foot Care Clinic Bluebird Community Access	Ann Perkins Dove Community Support	Booked Received	Feb 04, 10:45AM with Jules Roebbelen	  
yesterday	Michael PAGE	Adult Day Program Daisy Care Organization	Raven Crowe Dove Community Support	Booked	Feb 12, 10:00AM with Tessa Smith-Moo	 
2 days ago	Bob SMITH	Adult Day Program Daisy Care Organization	Ann Perkins Dove Community Support	Closed Ineligible	No Provider	 
3 days ago	David HILL	Adult Day Program Daisy Care Organization	Raven Crowe Dove Community Support	Booked Accepted	Feb 10, 2:00PM with Tessa Smith-Moo	  
4 days ago	William DREW	Meals on Wheels Daisy Care Organization	Raven Crowe Dove Community Support	Closed Admitted	No Provider	 
5 days ago	Mary JONES	Dementia & Stroke Daytime Care Bluebird Community Access	Ann Perkins Dove Community Support	Booked Received	Feb 07, 2:00PM with Jules Roebbelen	 
5 days ago	Henry HORTON	Adult Day Program Daisy Care Organization	Ann Perkins Dove Community Support	Booked	Feb 10, 10:00AM with Tessa Smith-Moo	  
7 days ago	Shannon COMBS	Adult Day Program Daisy Care Organization	Ann Perkins Dove Community Support	Booked Received	Feb 05, 10:00AM with Tessa Smith-Moo	  

Track Changes to Sent Referrals

Referrals - Dove Community Support Services

Inbox Outbox Audit

Outbox

View outgoing referrals from the people at this organization

From: Any Employee ☐ Hide Internal Referrals

State: All Submitted Booked Closed Unread Archived Action

Closed (All)

- Admitted
- Ineligible
- Service Declined

Sent	Registrant	Service	From	Status	Appointment	Workflow
6 days ago	Bob SMITH	Meals on Wheels	Ann Perkins Dove Community Support	Closed Ineligible	No Provider	
8 days ago	William DREW	TessaTest - Daisy Care Organizati	Raven Crowe Dove Community Support	Closed Admitted	No Provider	
2.6 mos ago	Kurt FORD	Living Well With Diabetes	Robin McBird Dove Community Support	Closed Service Dex	Dec 07, 9:00AM with Raven Crowe	

End of Referrals

Track Changes to Sent Referrals

Referrals - Dove Community Support Services

Inbox Outbox Audit

Outbox

View outgoing referrals from the people at this organization

From: Any Employee ☐ Hide Internal Referrals

State: All Submitted Booked Closed Unread Archived Action

Closed (All)

- Admitted
- Ineligible
- Service Declined

Sent	Registrant	From	Status	Appointment	Workflow
6 days ago	Bob SMITH	Ann Perkins Dove Community Support	Closed Ineligible	No Provider	
8 days ago	William DREW	Raven Crowe Dove Community Support	Closed Admitted	No Provider	
2.6 mos ago	Kurt FORD	Robin McBird Dove Community Support	Closed Service Dex	Dec 07, 9:00AM with Raven Crowe	

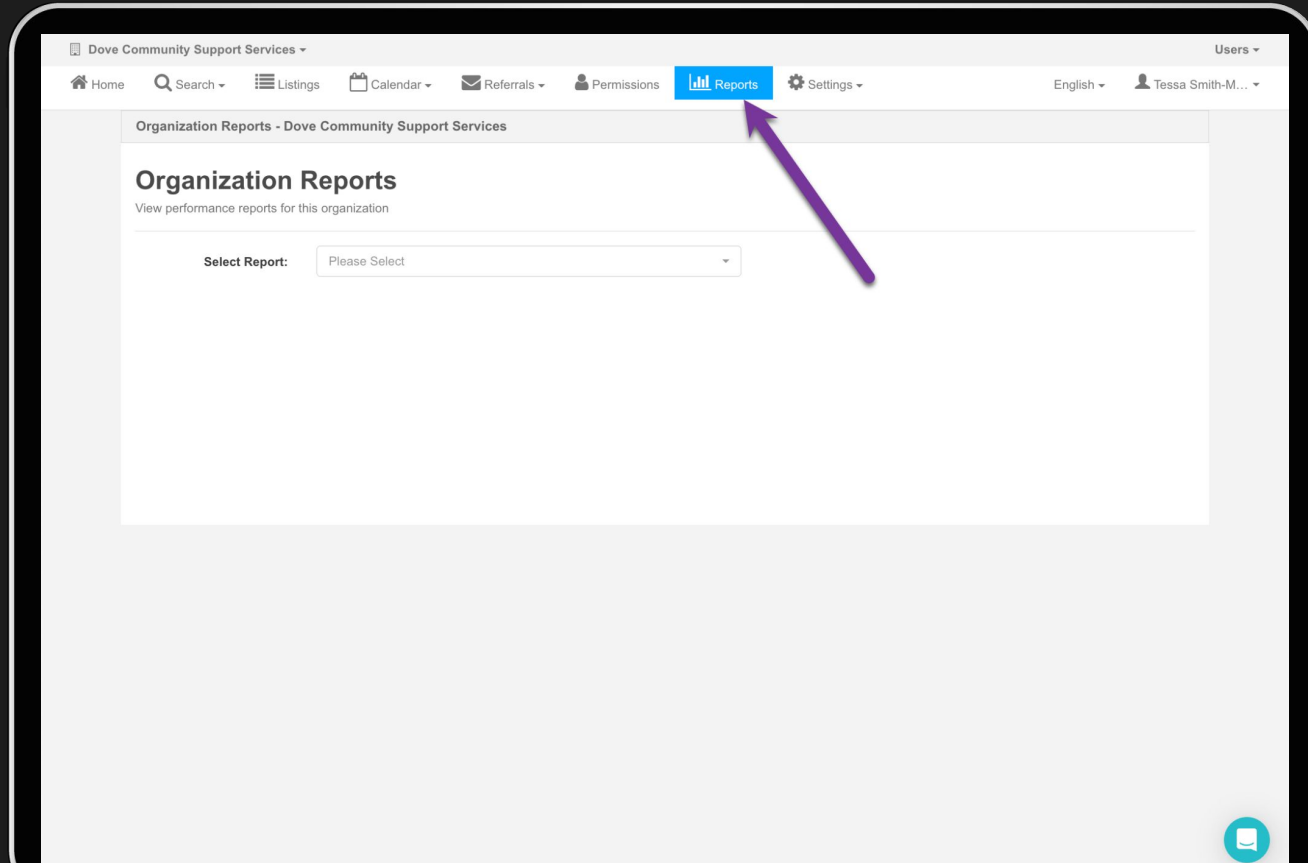
End of Referrals

Know when
referrals
you've sent
are closed +
completed

Utilize Predefined Caredove Reports



Run Reports for Your Organization



Report Example 1:

Track Referral Volume & Trends

Track Referral Volume & Trends

Organization Reports - Dove Community Support Services

Organization Reports

View performance reports for this organization

Select Report:

Please Select

Please Select

Chart: # Inbound Referrals over Time

Chart: # Outbound Referrals over Time

Chart: # eBooked Appointments Provided over Time

Chart: # Inbound Unique Referrers over Time

Chart: # Inbound Referrals, by Primary Service Category

Chart: # Inbound Referrals, by Requester Organization

Chart: # Inbound Referrals, by Recipient Organization

Chart: # Services per Inbound Referral

Spreadsheet: Inbound Referral Summary Data

Spreadsheet: Groups Events Summary

Spreadsheet: Services List

Spreadsheet: Organization Permissions List

Spreadsheet: Inbound Referral Raw Data

Spreadsheet: Outbound Referral Raw Data

Spreadsheet: Routed Referral Raw Data

**Chart:
Inbound
Referrals Over
Time**

Track Referral Volume & Trends

Organization Reports - Dove Community Support Services

Organization Reports

View performance reports for this organization

Select Report: Chart: # Inbound Referrals over Time

Calendar: All 8 calendars

Category: All 26 categories

Selected Service: All 23 services

Requesting Org: ? Any Organization

Referral Options: All Referral Options

Outcome Options: All Outcome Options

Current Status: All 3 statuses

Current Sub-Status: All 21 sub-statuses

Submitted Date: ☒ Show Previous Year ☐ Show Future Year

Destination Type: ☒ Internal ? ☒ External ? ☒ Sign Ups ?

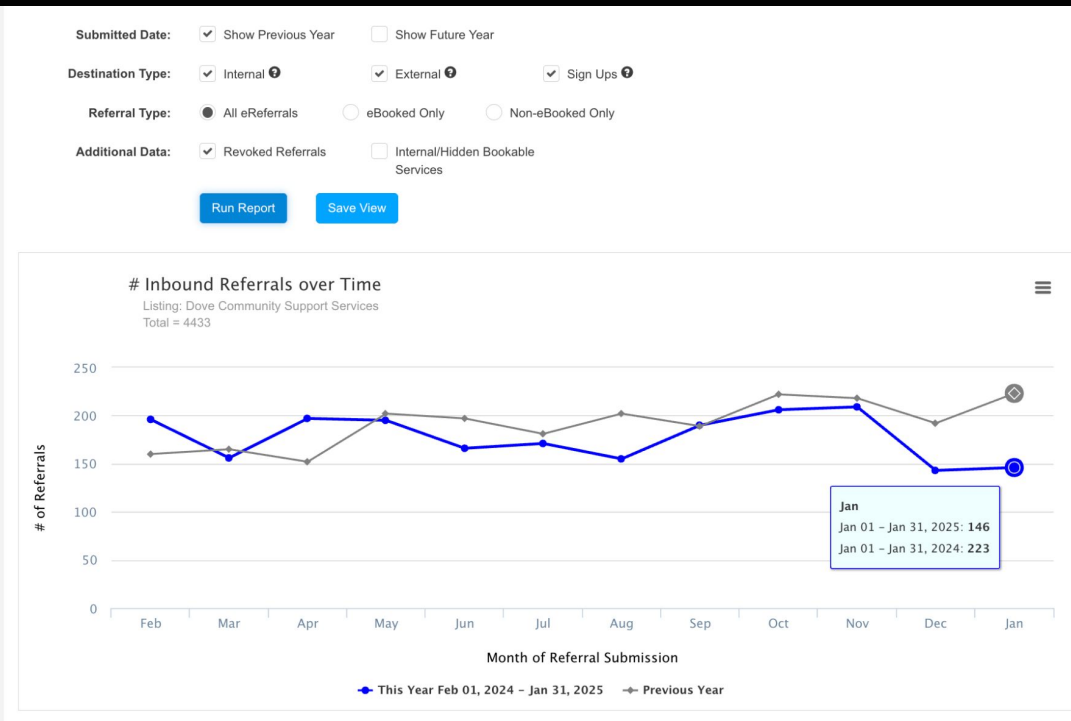
Referral Type: ☒ All eReferrals ☐ eBooked Only ☐ Non-eBooked Only

Additional Data: ☒ Revoked Referrals ☐ Internal/Hidden Bookable Services

[Run Report](#) [Save View](#)

Configure
report criteria

Tracking Referral Volume & Trends



Identify trends
over time

Report Example 2:

Track Team Performance & Service Optimization

Team Performance & Service Optimization

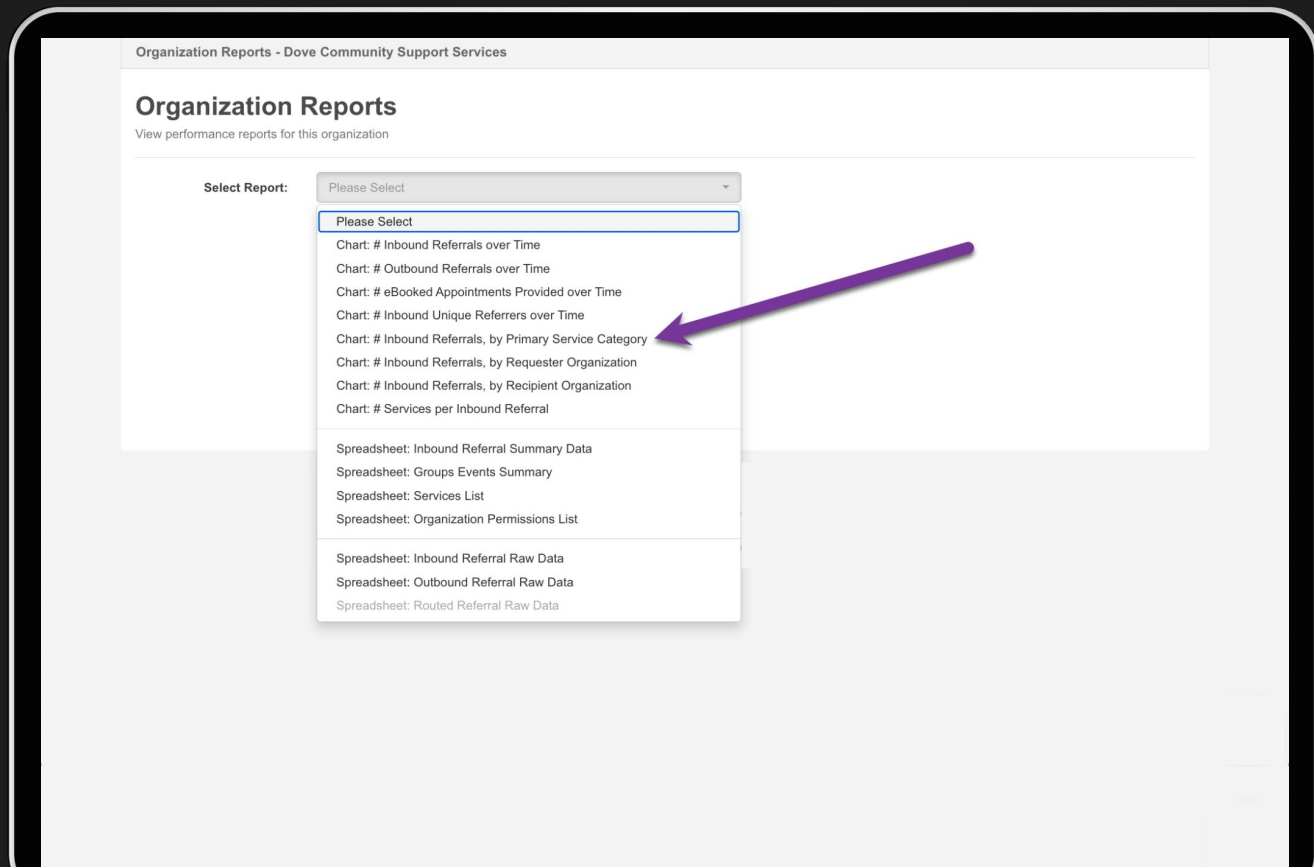


Chart:
Inbound
Referrals, by
Primary Service
Category

Team Performance & Service Optimization

Organization Reports - Dove Community Support Services

Organization Reports

View performance reports for this organization

Select Report: Chart: # Inbound Referrals, by Primary Service Category

Calendar: All 8 calendars

Category: All 26 categories

Submitted Date

☒ Last 12 Months ☐ Last 6 Months ☐ Last 3 Months ☐ Custom

Destination Type: ☒ Internal ☒ External ☒ Sign Ups

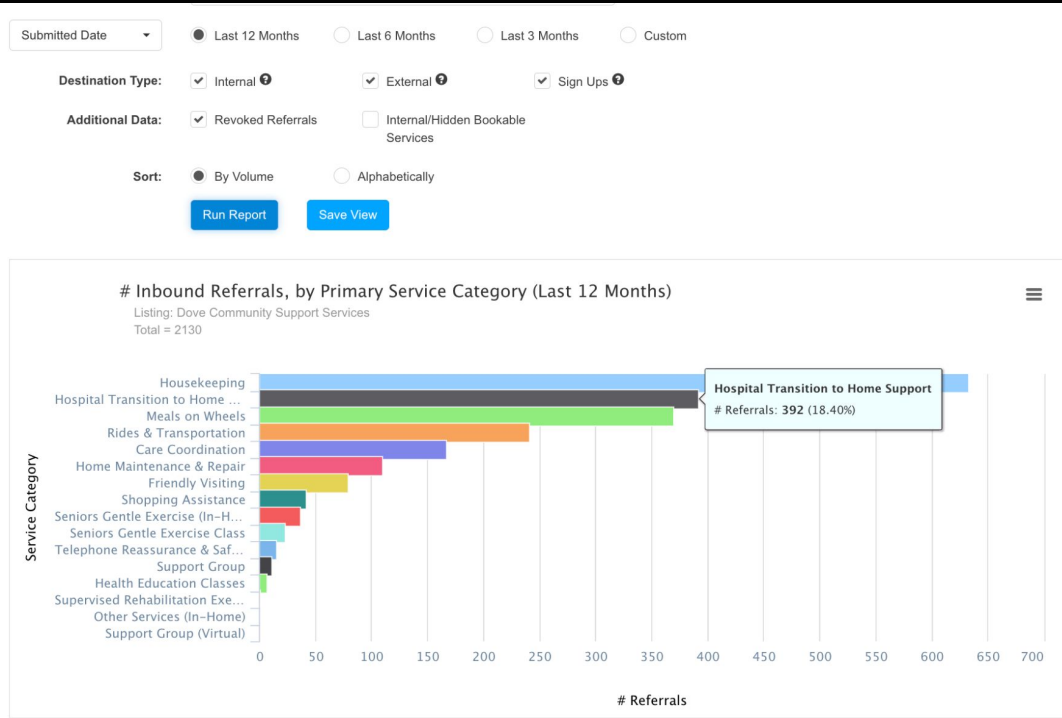
Additional Data: ☒ Revoked Referrals ☐ Internal/Hidden Bookable Services

Sort: ☒ By Volume ☐ Alphabetically

Run Report

Configure
report criteria

Team Performance & Service Optimization

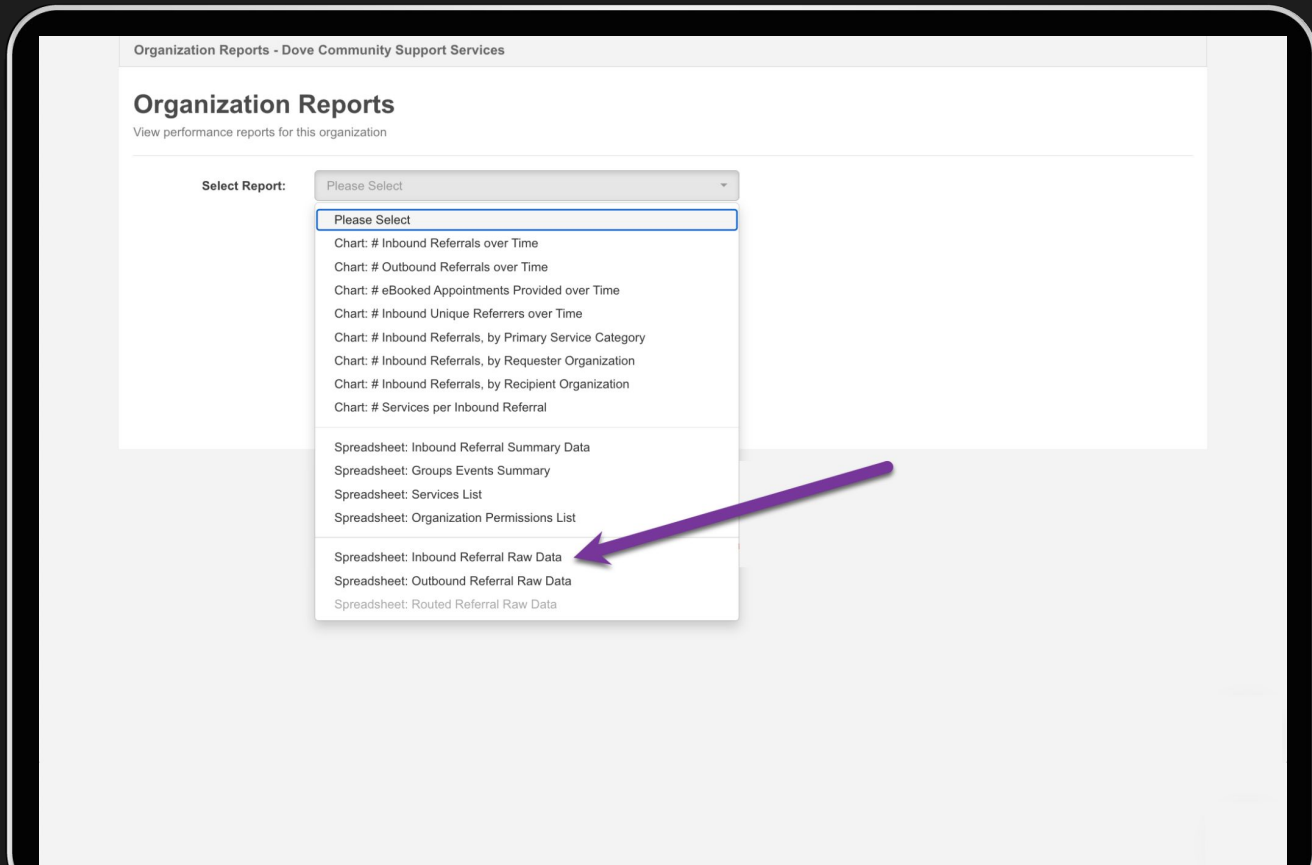


Assess referral activity per service category

Report Example 3:

**Detailed Referral Activity Insights
for Better Decision-Making**

Referral Insights for Decision-Making



**Spreadsheet:
Inbound
Referral Raw
Data**

[Understand the Referral
Raw Data Report](#)

Referral Insights for Decision-Making

Organization Reports - Dove Community Support Services

Organization Reports

View performance reports for this organization

Select Report: Spreadsheet: Inbound Referral Raw Data

Calendar: All 8 calendars

Category: All 26 categories

Submitted Date

☐ Last 3 Months ☐ Last Month ☐ Last Week ☒ Custom

Start Date

2024-02-01

End Date

2025-01-31

Destination Type: ☒ Internal ☒ External ☒ Sign Ups

Additional Data: ☒ Revoked Referrals ☐ Internal/Hidden Bookable Services ☐ Open Time Slots ☐ Test Referrals

Read Status: ☒ All ☐ Unread Only ☐ Read Only

Output Referral Options in: ☒ Single Column ☐ One Column per Field

Output Outcome Options in: ☒ Single Column ☐ One Column per Field

Download Data (.xlsx)

Specify
detailed report
criteria by
category,
timeframe, etc.

Referral Insights for Decision-Making

DEMO - Inbound Referral Raw Data Report .XLSX

File Edit View Insert Format Data Tools Help

100% \$ % 123 Arial - 10 + B I A

Summarize this table

Reference #	Group Appc Parent Ref	Date/Time	Date/Time Submitted	Month Subn	Date/Time of Appointr	Month of	Duration (m)	Status	Sub Status	Classificat	Sub Status	Res
1	7197462066	-	2024-02-01 09:20 AM	Feb, 2024	2024-02-20 01:00 PM	Feb, 2024	60	CLOSED	Completed	Admitted		
2	5176710125	-	2024-02-01 09:44 AM	Feb, 2024	2024-02-08 09:30 AM	Feb, 2024	60	CLOSED	Cancelled	Cancelled by Registrant		
3	6344955840	-	2024-02-01 10:08 AM	Feb, 2024	2024-02-29 03:00 PM	Feb, 2024	60	CLOSED	Completed	Admitted		
4	1874468344	-	2024-02-01 11:06 AM	Feb, 2024	2024-02-08 11:00 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
5	3577247151	-	2024-02-01 11:20 AM	Feb, 2024	2024-02-05 02:00 PM	Feb, 2024	60	CLOSED	Completed	Admitted		
6	9851665776	-	2024-02-01 11:54 AM	Feb, 2024	2024-02-14 11:00 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
7	3479557603	-	2024-02-01 12:21 PM	Feb, 2024	2024-02-08 01:00 PM	Feb, 2024	60	CLOSED	Completed	Admitted		
8	4056612809	-	2024-02-01 03:36 PM	Feb, 2024	-	-	60	CLOSED	Cancelled	Service Declined		
9	1230306928	-	2024-02-01 04:04 PM	Feb, 2024	2024-02-13 01:00 PM	Feb, 2024	60	CLOSED	Completed	Admitted		
10	9280141715	-	2024-02-02 09:25 AM	Feb, 2024	-	-	60	CLOSED	Submitted	Ready		
11	3054790644	-	2024-02-02 09:33 AM	Feb, 2024	2024-02-13 02:00 PM	Feb, 2024	60	CLOSED	Completed	Admitted		
12	5566058932	-	2024-02-02 09:41 AM	Feb, 2024	2024-02-06 01:00 PM	Feb, 2024	60	CLOSED	Completed	Admitted		
13	6698308477	-	2024-02-02 02:58 PM	Feb, 2024	2024-02-08 11:00 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
14	5988177275	-	2024-02-02 09:47 PM	Feb, 2024	2024-02-07 01:00 PM	Feb, 2024	30	BOOKED	Ready	Ready		
15	8939758077	-	2024-02-05 09:38 AM	Feb, 2024	2024-02-08 01:00 PM	Feb, 2024	30	BOOKED	Ready	Ready		
16	6509439215	-	2024-02-05 09:43 AM	Feb, 2024	2024-02-06 10:00 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
17	6172019476	-	2024-02-05 10:14 AM	Feb, 2024	2024-02-09 11:30 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
18	7184680071	-	2024-02-05 11:15 AM	Feb, 2024	2024-02-08 01:00 PM	Feb, 2024	60	CLOSED	Completed	Admitted		
19	1380336984	-	2024-02-05 12:59 PM	Feb, 2024	2024-02-15 01:00 PM	Feb, 2024	60	CLOSED	Completed	Admitted		
20	7466938984	-	2024-02-05 01:10 PM	Feb, 2024	2024-02-06 11:15 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
21	8647013321	-	2024-02-05 03:12 PM	Feb, 2024	2024-02-09 09:30 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
22	3717209658	-	2024-02-06 09:33 AM	Feb, 2024	2024-02-07 01:00 PM	Feb, 2024	60	CLOSED	Rejected	Ineligible		
23	7140742211	-	2024-02-06 10:09 AM	Feb, 2024	2024-02-08 10:30 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
24	7808128548	-	2024-02-06 12:10 PM	Feb, 2024	2024-02-15 10:00 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
25	6939882112	-	2024-02-06 12:46 PM	Feb, 2024	2024-02-20 10:00 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
26	8443768642	-	2024-02-06 02:03 PM	Feb, 2024	2024-02-20 01:00 PM	Feb, 2024	60	CLOSED	Cancelled	Cancelled by Provider		
27	4998317076	-	2024-02-06 02:05 PM	Feb, 2024	2024-02-08 01:30 AM	Feb, 2024	60	CLOSED	Cancelled	Cancelled by Registrant		
28	1963243460	-	2024-02-06 02:44 PM	Feb, 2024	2024-02-27 02:30 PM	Feb, 2024	60	CLOSED	Cancelled	Service Declined		
29	1399219497	-	2024-02-06 02:55 PM	Feb, 2024	2024-02-15 12:30 PM	Feb, 2024	60	CLOSED	Completed	Admitted		
30	9937930325	-	2024-02-06 03:19 PM	Feb, 2024	2024-02-09 09:30 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
31	6232061922	-	2024-02-06 03:32 PM	Feb, 2024	2024-02-07 11:45 AM	Feb, 2024	60	CLOSED	Completed	Admitted		
32	8915858665	-	2024-02-06 03:43 PM	Feb, 2024	2024-02-15 11:30 AM	Feb, 2024	60	CLOSED	Cancelled	Service Declined		
33	3567985365	-	2024-02-06 03:49 PM	Feb, 2024	2024-02-08 01:30 PM	Feb, 2024	30	BOOKED	Ready	Ready		
34	5052074766	-	2024-02-06 03:51 PM	Feb, 2024	2024-02-21 11:00 AM	Feb, 2024	60	CLOSED	Cancelled	Service Declined		
35	5631640250	-	2024-02-07 11:36 AM	Feb, 2024	2024-02-12 01:00 PM	Feb, 2024	30	BOOKED	Ready	Ready		
36	5731990110	-	2024-02-07 11:40 AM	Feb, 2024	2024-02-13 01:00 PM	Feb, 2024	30	BOOKED	Ready	Ready		
37	3469276777	-	2024-02-07 11:46 AM	Feb, 2024	2024-02-20 11:30 AM	Feb, 2024	60	CLOSED	Completed	Admitted		

Review
Detailed Raw
Data Report

Understand the Referral
Raw Data Report

Referral Insights for Decision-Making

DEMO - Inbound Referral Raw Data Report .XLSX

File Edit View Insert Format Data Tools Help

Cells Rows Columns Sheet Tables Timeline Chart **Pivot table** Image Drawing Function Link Checkbox Dropdown Emoji Smart chips Comment Note

Ref	Month	Subn	Date/Time of Appointr	Month of	Duration (m)	Status	Sub Status	Classificat	Sub Status	Res
1	Feb, 2024		2024-02-20 01:00 PM	Feb, 2024	60	CLOSED	Completed		Admitted	
2	Feb, 2024		2024-02-08 09:30 AM	Feb, 2024	60	CLOSED	Cancelled		Cancelled by Registrant	
3	Feb, 2024		2024-02-29 03:00 PM	Feb, 2024	60	CLOSED	Completed		Admitted	
4	Feb, 2024		2024-02-08 11:00 AM	Feb, 2024	60	CLOSED	Completed		Admitted	
5	Feb, 2024		2024-02-05 02:00 PM	Feb, 2024	60	CLOSED	Completed		Admitted	
6	Feb, 2024		2024-02-14 11:00 AM	Feb, 2024	60	CLOSED	Completed		Admitted	
7	Feb, 2024		2024-02-08 01:00 PM	Feb, 2024	60	CLOSED	Completed		Admitted	
8	Feb, 2024		-			CLOSED	Cancelled		Service Declined	
9	Feb, 2024		2024-02-13 01:00 PM	Feb, 2024	60	CLOSED	Completed		Admitted	
10	Feb, 2024		-			SUBMITTED	Ready		Ready	
11	Feb, 2024		2024-02-13 02:00 PM	Feb, 2024	60	CLOSED	Completed		Admitted	
12	Feb, 2024		2024-02-06 01:00 PM	Feb, 2024	60	CLOSED	Completed		Admitted	
13	Feb, 2024		2024-02-08 11:00 AM	Feb, 2024	60	CLOSED	Completed		Admitted	
14	Feb, 2024		2024-02-07 01:00 PM	Feb, 2024	30	BOOKED	Ready		Ready	
15	Feb, 2024		2024-02-08 01:00 PM	Feb, 2024	30	BOOKED	Ready		Ready	
16	Feb, 2024		2024-02-06 10:00 AM	Feb, 2024	60	CLOSED	Completed		Admitted	
17	Feb, 2024		2024-02-09 11:30 AM	Feb, 2024	60	CLOSED	Completed		Admitted	
18	Feb, 2024		2024-02-08 01:00 PM	Feb, 2024	60	CLOSED	Completed		Admitted	
19	Feb, 2024		2024-02-15 01:00 PM	Feb, 2024	60	CLOSED	Completed		Admitted	
20	Feb, 2024		2024-02-06 11:15 AM	Feb, 2024	60	CLOSED	Completed		Admitted	
21	Feb, 2024		2024-02-09 09:30 AM	Feb, 2024	60	CLOSED	Completed		Ineligible	
22	Feb, 2024		2024-02-07 01:00 PM	Feb, 2024	60	CLOSED	Rejected		Ineligible	
23	Feb, 2024		2024-02-08 10:30 AM	Feb, 2024	60	CLOSED	Completed		Admitted	
24	Feb, 2024		2024-02-15 10:00 AM	Feb, 2024	60	CLOSED	Completed		Admitted	
25	Feb, 2024		2024-02-20 10:00 AM	Feb, 2024	60	CLOSED	Completed		Admitted	
26	Feb, 2024		2024-02-20 01:00 PM	Feb, 2024	60	CLOSED	Cancelled		Cancelled by Provider (I	
27	Feb, 2024		2024-02-08 11:30 AM	Feb, 2024	60	CLOSED	Cancelled		Cancelled by Registrant	
28	Feb, 2024		2024-02-27 02:30 PM	Feb, 2024	60	CLOSED	Cancelled		Service Declined	
29	Feb, 2024		2024-02-15 12:30 PM	Feb, 2024	60	CLOSED	Completed		Admitted	
30	Feb, 2024		2024-02-09 09:30 AM	Feb, 2024	60	CLOSED	Completed		Admitted	
31	Feb, 2024		2024-02-07 11:45 AM	Feb, 2024	60	CLOSED	Completed		Admitted	
32	Feb, 2024		2024-02-15 11:30 AM	Feb, 2024	60	CLOSED	Cancelled		Service Declined	
33	Feb, 2024		2024-02-08 01:30 PM	Feb, 2024	30	BOOKED	Ready		Ready	
34	Feb, 2024		2024-02-21 11:00 AM	Feb, 2024	60	CLOSED	Cancelled		Service Declined	
35	Feb, 2024		2024-02-07 11:36 AM	Feb, 2024	30	BOOKED	Ready		Ready	
36	Feb, 2024		2024-02-13 01:00 PM	Feb, 2024	60	CLOSED	Ready		Ready	
37	Feb, 2024		2024-02-13 01:00 PM	Feb, 2024	60	BOOKED	Ready		Ready	
38	Feb, 2024		2024-02-07 11:46 AM	Feb, 2024	60	CLOSED	Completed		Admitted	

Insert a Pivot
Table for
Targeted
Referral Data

[Understand the Referral
Raw Data Report](#)

Referral Insights for Decision-Making

DEMO - Inbound Referral Raw Data Report .XLSX

File Edit View Insert Format Data Tools Help

100% \$ % 0.00 123 Default... - 10 +

Summarize this table

Sender Name	COUNT of Reference #
Adam Westcott	2
Allison Keating	3
Allison Vega	2
Allison Vickers	9
Alyssa Simmons	13
Amanda Holloway	8
Amber Holloway	4
Amelia Rothschild	1
Amelia Westwood	21
Andrea Whitmore	5
Angela Forbes	2
Angela Whitaker	8
API CHRIS Account	1
API Ocean eReferral	36
Ashley Redmond	319
Ayesha Khan	3
Barbara Sheldon	6
Beatrice Carver	1
Bianca Rinaldi	4
Brenda Holloway	1
Brenda Whitaker	2
Brianna Caldwell	2
Bridget Harrington	1
Brooke Davidson	3
Caitlin Andrews	7
Carri Bunn	7
Cassandra Delacroix	9
Cassandra Monroe	4
Cassidy Vance	8
Centre Clinic	1
Charlotte McBride	2
Chelsea Radcliffe	5
Christine Turner	1

Pivot table editor

Booking'11:2132

Clear all

Suggested

Rows

Sender Name

Order Ascending Sort by Sender ...

Show totals

Columns

Values

Reference #

Summarize by COUNT Show as Default

Filters

Reference #

Group Appointment #

Parent Reference #

Date/Time Invited

Date/Time Submitted

Month Submitted

Date/Time of Appointment...

Month of Appointment

Duration (min)

Status

Sub Status Classification

Sub Status

Read Status

Provider Names

Provider Account Organi...

Service Organization

Calendar

Service Option

Service Selected

Service Selected Category

Other Services Categorie...

Configure the
Pivot Table
Criteria to See
Specific Activity

Report Example 4:

**Understand Organization
Relationships Through Referral Data**

Referral Insights for Decision-Making

DEMO - Inbound Referral Raw Data Report .XLSX ☆ Saved to Drive

File Edit View Insert Format Data Tools Help

100% 123 Default... 10 B I A

Sender Organization

Summarize this table

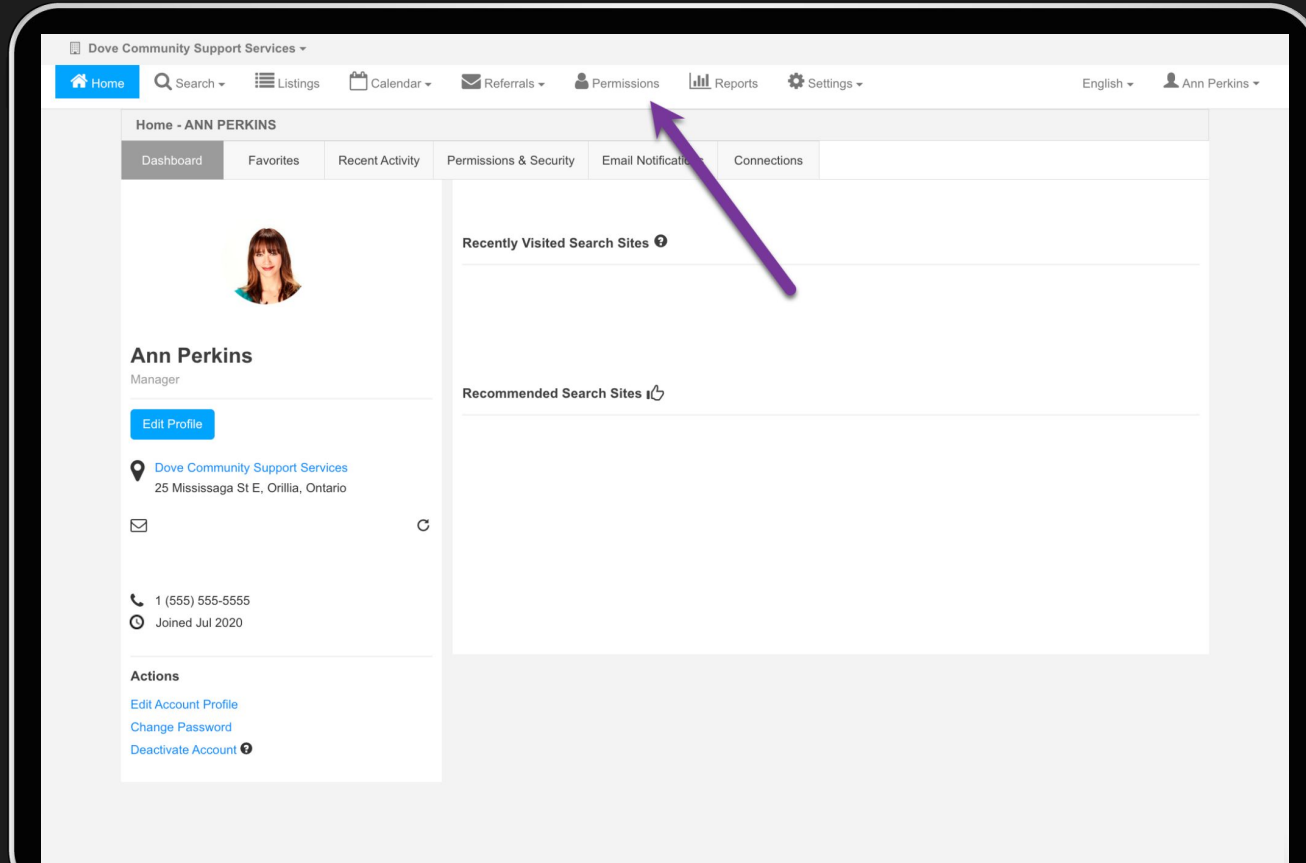
	A	B	C	D	E	F	G	H
1	Sender Organization	COUNT of Reference #						
2		266						
3	Alzheimer Society of Waterloo Wellington	1						
4	API CHRIS (System Org)	1						
5	API Ocean eReferral (System Org)	36						
6	Cambridge Memorial Hospital	16						
7	Canadian Mental Health Association - Waterloo Wellington	7						
8	CBI Home Health - Guelph	15						
9	CBI Home Health - Waterloo	21						
10	City of Waterloo	1						
11	Dove Community Support Services	947						
12	Grand River Hospital	7						
13	Ontario Health atHome - Waterloo Wellington	782						
14	St. Joseph's Health Centre - Guelph	3						
15	St. Mary's General Hospital	19						
16	The Centre for Family Medicine Family Health Team	4						
17	Two Rivers Family Health Team	5						
18	Grand Total	2131						
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
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31								
32								
33								
34								
35								

Insert Pivot
Table to Assess
Top Sending
Organizations

User Permission Report

Remove inactive users

Navigate to the Permissions Tab



Review and Adjust User Permissions

<div>+ Add User</div>		<div>Search Users</div>	<div>?</div>	<div>x</div>	<div>Active</div>		<div>Deactivated</div>	
#	Name	Permissions	Who Added	Last Login				
1	★ Ann Perkins , OSP Therapist	<div>?</div> <div>Organization Administrator</div>	by Tessa Smith-Moore	11 mins ago				
		<div>?</div> <div>Referral Delegate</div>	by Tessa Smith-Moore					
		<div>?</div> <div>Calendar Delegate: Intake</div>	by Tessa Smith-Moore					
Jeff Doleweerd, CEO								
2	<div>External</div> Caredove	<div>?</div> <div>Organization Administrator</div>	by Jeff Doleweerd	21 hrs ago				
★ Jules Roebbelen, Customer Success Manager								
3	<div>External</div> Caredove	<div>?</div> <div>Referral Delegate</div>	by Jules Roebbelen	48 mins ago				
4	★ Raven Crowe , Community Services Director	<div>?</div> <div>Organization Administrator</div>	by Jules Roebbelen	2.4 years ago				
		<div>?</div> <div>Referral Delegate</div>	by Jules Roebbelen					
		<div>?</div> <div>Calendar Delegate: Intake</div>	by Jules Roebbelen					
		<div>?</div> <div>Calendar Delegate: Workshops</div>	by Jules Roebbelen					
5	★ Robin McBird , Intake Coordinator	<div>?</div> <div>Referral Delegate</div>	by Raven Crowe	2 days ago				
		<div>?</div> <div>Calendar Provider: Intake</div>	by Jules Roebbelen					
★ Tessa Smith-Moore, Operations Coordinator								
6	<div>External</div> Caredove	<div>?</div> <div>Organization Administrator</div>	by Tessa Smith-Moore	39 mins ago				
		<div>?</div> <div>Referral Delegate</div>	by Tessa Smith-Moore					
<div>Caredove Administrator</div>								

Adjust Permissions Accordingly

The screenshot displays a user management interface with a modal titled "Permissions - Raven Crowe" open. The modal contains the following fields:

- Organizational:** A dropdown menu with "Organization Administrator" selected.
- Referrals:** A dropdown menu with "Organization Administrator" selected, showing a list of options: "None", "Organization Administrator", "Edit/invite users, add/edit services, edit listing settings", "Listing Manager", and "Add/edit services".
- Calendar:** A dropdown menu with "Calendar Delegate" selected, showing a list of options: "Workshops" and "Calendar Delegate".

At the bottom of the modal are "Save" and "Cancel" buttons. The background interface shows a list of users with columns for Name, Last Login, and a menu icon. The user "Raven Crowe, Community Services Director" is highlighted in green.

#	Name	Last Login
1	★ Ann Perkins, OSP Therapist	11 mins ago
2	Jeff Doleweerd, CEO External Caredove	21 hrs ago
3	★ Jules Roebbelen, Customer Success Manager External Caredove	48 mins ago
4	★ Raven Crowe, Community Services Director	2.4 years ago
5	★ Robin McBird, Intake Coordinator	2 days ago
6	★ Tessa Smith-Moore, Operations Coordinator External Caredove	39 mins ago

caredove

Thank You!



www.caredove.com



jeff@caredove.com



[@caredove](https://twitter.com/caredove)