
This Quick Reference Guide (QRG) reviews the Beacon HealtheCare Dashboard.

Common Buttons & Icons

	Care Managers tab
	Case List tab
	Expand icon
	Arrow icon
	Menu icon

Filter Notes and Reminders

➤ **From the Care Manager Management Dashboard:**

STEP 1: Click the **Overview** tab.

STEP 2: Click the **Result Range** drop-down arrow in the Notes/Reminders section.

STEP 3: Click the desired range from the menu. The section updates to display only those notes and reminders.

View Care Managers Caseload

➤ **From the Care Manager Management Dashboard:**

STEP 1: Click the **Care Managers** tab. A list of all the managers and their potential and current cases display.

STEP 2: Click the **Expand** icon next to a manager to view more details.

NOTE: Use the sections as needed to manage cases, view reminders, or refer new patients.

View Manager Case List

➤ **From the Care Manager Management Dashboard:**

STEP 1: Click the **Case List** tab. The Case List for the selected provider displays.

STEP 2: Click the **Case List for** drop-down arrow to change the provider in view.

STEP 3: Use the **Expand** icon to view further details about each patient as needed.

Filter and Customize Case List

➤ From the Case List tab:

STEP 1: Click the **Manage Filters** button. The Manage Filters window displays.

STEP 2: Use the drop-down arrows as needed to change the patients in view.

NOTE: Use the **Clear All Filters** button to show all patients in the list.

STEP 3: Click **Apply** to confirm your filter selections.

NOTE: Use the arrow icon in the column header to sort the list by that information.

STEP 4: Click the **Menu** icon. A drop-down menu displays.

STEP 5: Make selections as needed.

NOTE: You can also drag and drop the headers to change the order in which information displays in the table.