

## Exit process when an assessor leaves

### Information for LTCF assessors and managers

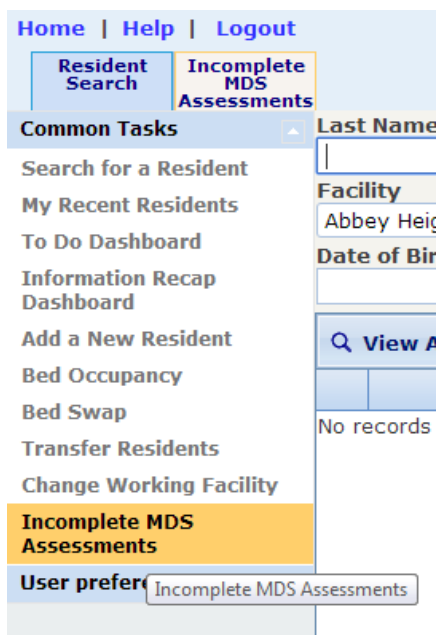
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#### What to do first?

Assessors leaving a facility firstly need to review the status of all of their assessments and identify any that have been left in Draft, or those that need to be marked complete.

#### How to find an assessor's draft, or incomplete assessments

**Step 1:** From the Common Tasks Menu, click on 'Incomplete MDS Assessments'.



Home | Help | Logout

Resident Search | **Incomplete MDS Assessments**

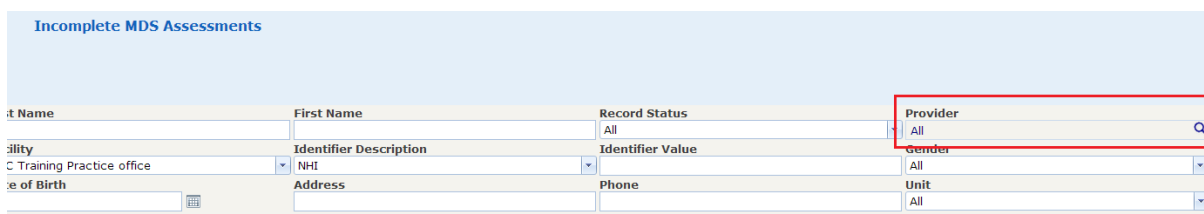
**Common Tasks**

- Search for a Resident
- My Recent Residents
- To Do Dashboard
- Information Recap Dashboard
- Add a New Resident
- Bed Occupancy
- Bed Swap
- Transfer Residents
- Change Working Facility
- Incomplete MDS Assessments**
- User preferences

Last Name  
 Facility  
 Abbey Heights  
 Date of Birth  
 View All  
 No records

Incomplete MDS Assessments

**Step 2:** Look up the assessor's name using the 'Provider Search' tab.



Incomplete MDS Assessments

First Name	Record Status	Provider
	All	All

Identifier Description: NHI  
 Identifier Value: All  
 Gender: All  
 Address: All  
 Phone: All  
 Unit: All

Step 3: Type in the assessor details and click search.

Step 4: Double Click on the name from the search results (**note: assessors with the same name will be displayed**)

Step 5: Confirm the correct name is now in the provider box and Click on 'View Assessments' tab.

A list of the assessor's residents with draft assessments, along with their details on 'Incomplete Sections' will be displayed.

Step 6: The assessor will need to go through all of these assessments and mark these as 'Complete'.

## What to do next?

When an assessor leaves a facility, it is important that they remove themselves as a 'Provider'. This requires the assessor to identify all the clients who are listed as in their care.

## How to find all the assessor's clients

**Step 1:** From the 'Resident Search' screen, repeat steps above to find the name of the nurse assigned as provider

**Step 2:** When the right name is in the provider box click on Search

The screenshot shows the 'Resident Search' form. The 'Provider' dropdown menu is open, showing 'Allen, Richard (Mr.) LTC System Clinician' selected. The 'Search' button is highlighted with a red box. Below the form is a table with columns: Primary ID, Last Name, First Name, Gender, DOB, Status, Facility, and Unit Room Bed.

A list of residents the assessor is assigned to as a 'Provider' will be displayed.

**Step 3:** Work through this list, removing the assessor's name as 'Provider' on the 'Resident Overview' screen. To do this, click on the name to highlight the line, then click on 'Delete'.

The screenshot shows a table with the following content:

Providers	
Allen, Richard (Mr.) LTC System Clinician	Registered Nurse

Primary Contact	
No Contacts Exist	

**Step 4 :** Add the name of the interRAI trained RN who will be taking over the care of the resident.

## Final stage – deactivating an assessor's account

**Step 1:** Complete the User Access Form and tick the 'Deactive User' section. Email this to the interRAI team – [interRAI@dhbsharedservices.health.nz](mailto:interRAI@dhbsharedservices.health.nz)