Responding to Referrals
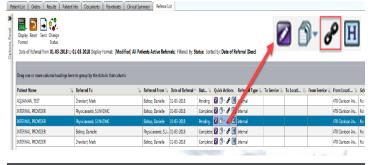
Understanding Referral Response Actions

The referral response process allows the user to view/edit linked documents and view the history of the created referral. To access these actions; we start with opening the referral list.
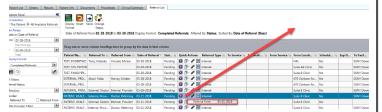

Show/Modify
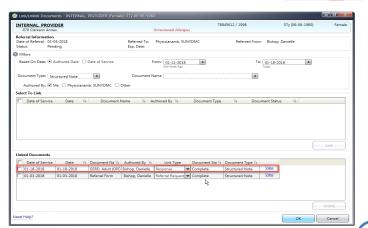
View and edit referral information.

View Linked Documents

Access documents linked to the referral.

Link/Unlink Documents

Link/Unlink preferred documents with this referral.

Completing the Referral Order

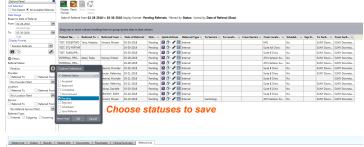right click and select COMPLETE

Referral Completion

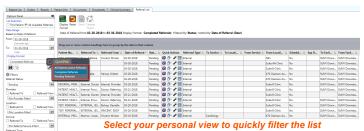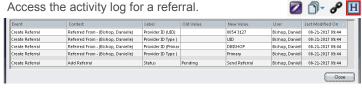Mark completed referrals with a status of "Completed".

Create a custom referral view

From the referral list you are able to filter referrals by status. These custom filters can be saved for future use.

Choose statuses to save

Click the save icon and create a name for this view

Select your personal view to quickly filter the list

Access the activity log for a referral.

If you have additional questions or concerns please call the "Global HelpDesk" at 7182704357 option # 1