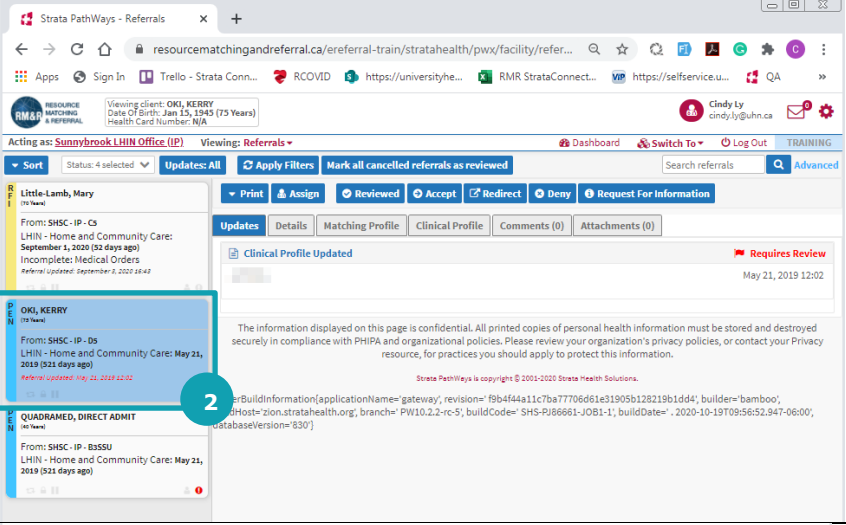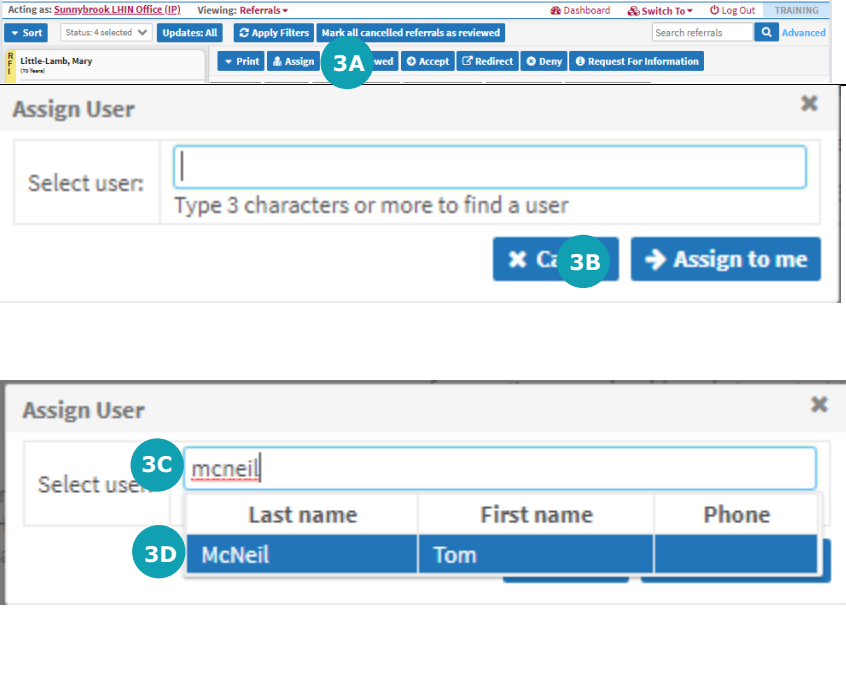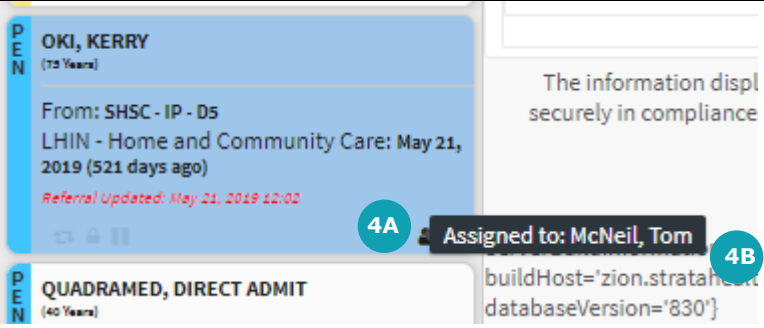# Assign a Referral

Overview

The assign feature in RM&R enables a referral to be associated with a single user within the Service Provider view. Through this feature, users can identify the referrals that they or their colleagues are responsible for and act on them accordingly.

Instructions

Step 1 **Access referral queue** For more details on how to access existing patient profile, please review the *Access The Referral Queue.*	
Step 2 **Search for referral** For more details on how to access existing patient profile, please review the *Search For a Referral.* Select the patient's referral. Selecting the referral will change the background colour from white to blue.	
Step 3 **Assign referral** A) Click on *Assign* button In the resulting pop-up you have two options to assign the referral: Assign to yourself: B) Click the Assign to me button Assign to another user: C) Begin typing the name of the user you want to assign the referral to D) Select the desired user from the list of matching names by clicking on the name	

E) Click Assign	
Step 4 **Assign referral** A) Once a user has been assigned to a referral, the icon on the referral tile will turn black B) Hovering the mouse cursor over the icon will display the assigned user's name Please note: You may only assign a referral to one person at a time. To reassign, follow steps 3-5 again.	**OKI, KERRY** (73 Years) From: SHSC - IP - D5 LHIN - Home and Community Care: May 21, 2019 (521 days ago) *Referral Updated: May 21, 2019 12:02* **4A** Assigned to: McNeil, Tom **QUADRAMED, DIRECT ADMIT** (40 Years) The information displ securely in compliance buildHost='zion.stratah **4B** databaseVersion='830'}

Step 5
Remove assigned referral
 	
If there is not another user to immediately assign it to, they are able to dissociate themselves from the referral.
 	
A) Click on the Reassign button
 	
B) Select Dissociate button.
 	
The icon will turn light grey again.
	pdates: All ⟳ Apply Filters Mark all cancelled referrals as reviewed Search referrals
	5A 👤 Reassign ⊘ Reviewed ⊕ Accept ⧉ Redirect ⊗ Deny ⓘ Request For Information
	Updates Details Matching Profile Clinical Profile Comments (0) Attachments (0)
	
	Reassign User ✕
	Currently assigned to: Tom McNeil
	Select user: [ ]
	              Type 3 characters or more to find a user
	              ✕ Cancel → Assign **5B** ⊙ Dissociate
	                                                  health information must be stored
	securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or cont
	                    resource, for practices you should apply to protect this information.
	
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