

How do I filter referrals?



Step 1

Access the **referral queue** by following the 'How do I access the referral queue' guide.

Step 2

There are two options to filter and refine the referral queue. You can filter by status and by referral update status

- **Status** - to filter the referral queue by referral status, click on the **Status** dropdown (2a). Select desired referral status(es) by clicking on the associated check box(es) (2b)
- **Updates** – you can filter the referral queue based on 3 different referral update statuses, click on the **Updates** dropdown (2c):
 - **No Updates (2d)** – referrals that have never been updated since sent
 - **Review Not Required (2e)** – referrals that have been updated and reviewed by a user at the receiving organization
 - **Review Required (2f)** – referrals that have been updated but not reviewed at the receiving organization

Step 3

Once you've selected your filter(s), click the **Refresh** button (3a). Matching patients will be displayed in the referral queue (3b). In this example, we have filtered referrals to those that are either reviewed or have no updates.

Step 4

To revert to the original Referral Queue showing all referrals, click on **Reset Search (4)** at anytime.

For more information on referral search options, please view the 'How do I search referrals' guide.