



WORKFLOW OVERVIEW

Assign a provider to a referral

Confirm each candidate's response before assignment, select the accepted provider, and leave a clear assignment record on the referral.

1 · OPEN

Find the referral that is ready for assignment.

2 · CONFIRM

Check accepted, rejected, and awaiting responses.

3 · ASSIGN

Select the accepted candidate in the provider dialog.

4 · VERIFY

Confirm the assigned provider on the referral.

1

Open Noah Patel's referral

From the referral list, open the ICBC OT Community Assessment that is waiting for a provider.

Work

Money

Inbox

Reports

Team

Tools

Settings

Referrals

Referrals

Quick Stats

OPEN REFERRALS
16

ASSIGNED REFERRALS
18

WAITLIST
6

LOST
6

TOTAL INVITED
58
Candidates

TOTAL ACCEPTED
0
Candidates

TOTAL REJECTED
0
Candidates

ALL REFERRALS
63

All Referrals

Search...

More Filters

Sort

Title	Status	Invited	Accepted	Rejected	Created At	Actions
Outbound — Nephrology (albumin / eGFR)	Assigned	0	0	0	Mar 19, 2025	
Outbound — Ophthalmology (interval eye screen)	Assigned	0	0	0	Sep 15, 2025	
Outbound — Ophthalmology (diabetic eye screen)	Assigned	0	0	0	Sep 6, 2023	

Web app · Referrals

Noah Patel referral

2

Confirm the response status first

Maya Chen has accepted, Daniel Kim has rejected, and Priya Sharma and Grace Okafor are still invited and awaiting responses. Maya is the realistic choice to assign.

ICBC OT Community As... REFERRAL APPROVAL CONFIRMED

#662 · Occupational Therapist · Vancouver · Created Sep 30, 2026 · Updated 13 min ago

ALL REFERRALS EDIT MORE ACTIONS

CANDIDATES
4 invited
1 accepted · 1 declined

AUTOMATION
Off

Candidates Send reminders Invite

CANDIDATE	TRAVEL	PRIORITY	STATUS	THREAD	LAST ACTIVITY
MC Maya Chen	13 min · 4.4 km	14	Accepted		Responded Sep 30
DK Daniel Kim	20 min · 7.1 km	22	Rejected		Responded Sep 30
PS Priya Sharma	32 min · 13.4 km	36	Invited		Invited Sep 30
GO Grace Okafor	42 min · 21.1 km	47	Invited		Invited Sep 30

Description Edit

Synthetic ICBC community occupational therapy assessment. Client visit is at the marked Vancouver location.

Consult Responses Add Response

No specialist response recorded yet Add Response

Attachments 0 Add files

Client

Noah Patel
noah.patel.icbc@sunrise-demo.example

PAYER ICBC

LOCATION 3540 W 41st Ave Suite 205, Vancouver, BC V6N 3B8, Canada · travel required

Source

CONTACT noah.patel.icbc@sunrise-demo.example

Assigned Provider

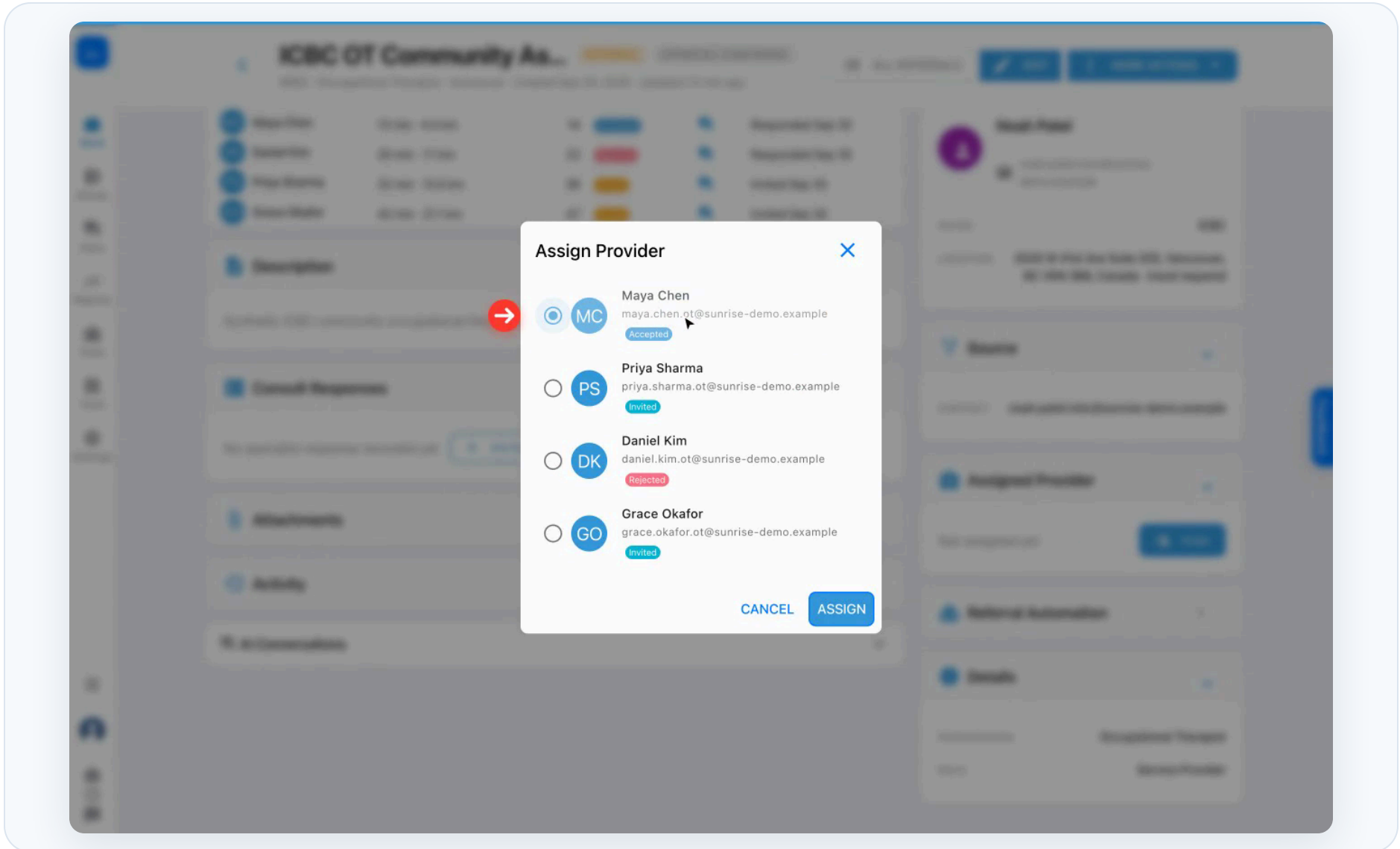
Not assigned yet Assign

Feedback

3

Open the provider assignment dialog

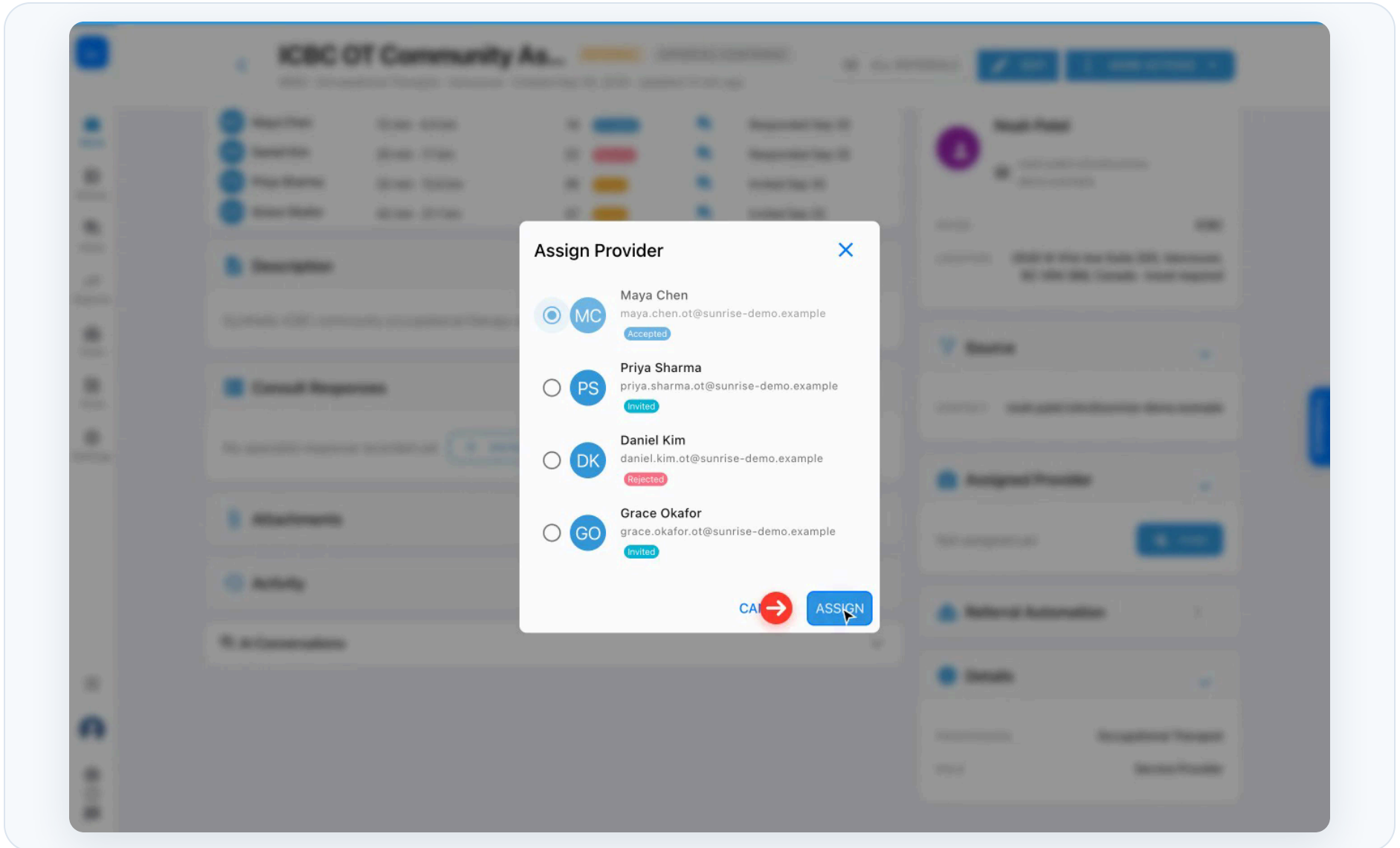
Choose **Assign** in the Assigned Provider panel. The dialog carries each candidate's current response status into the selection step.



4

Select Maya Chen

Select Maya because her accepted response is already recorded. The other candidates remain visible for context, including Daniel's rejection and the two outstanding invitations.



5

Confirm the assignment

Choose **Assign**. A success message appears and the Assigned Provider panel now identifies Maya Chen as the referral's service provider.

The screenshot displays a web application interface for managing referrals. The top navigation bar includes a search bar, a success message "Provider assigned successfully", and a user profile for Jordan Avery. The main content area shows a referral for Maya Chen, with a list of providers and their status. The right sidebar provides details about the referral, including the payer (ICBC), location, source, assigned provider (Maya Chen), and referral automation options.

Referral Details: #662 - Occupational Therapist - Vancouver - Created Sep 30, 2026 - Updated just now

Provider	Distance	Status	Action	Response
MC Maya Chen	13 min · 4.4 km	Accepted	Assign	Responded Sep 30
DK Daniel Kim	20 min · 7.1 km	Rejected	Assign	Responded Sep 30
PS Priya Sharma	32 min · 13.4 km	Invited	Assign	Invited Sep 30
GO Grace Okafor	42 min · 21.1 km	Invited	Assign	Invited Sep 30

Description [Edit](#)

Synthetic ICBC community occupational therapy assessment. Client visit is at the marked Vancouver location.

Consult Responses [+ Add Response](#)

No specialist response recorded yet [+ Add Response](#)

Attachments [+ Add files](#)

Activity

AI Conversations

Right Sidebar:

- Noah Patel**
noah.patel.icbc@sunrise-demo.example
- PAYER** ICBC
- LOCATION** 3540 W 41st Ave Suite 205, Vancouver, BC V6N 3B8, Canada · travel required
- Source**
- CONTACT** noah.patel.icbc@sunrise-demo.example
- Assigned Provider**
MC Maya Chen
Service Provider
- Referral Automation**
- Details**
- PROFESSIONS** Occupational Therapist
- ROLE** Service Provider

Feedback

The referral is assigned to a provider who accepted



The response history is visible.

Accepted, rejected, and outstanding invitations remain clear.



The assignment follows the recorded response.

Maya is selected after her acceptance is recorded.



The referral updates immediately.

The Assigned Provider panel names Maya Chen.



The client and referral stay together.

Noah Patel's referral retains the full candidate context.

Explore InToday

Bring referral intake, provider responses, assignment, reminders, and client care together in one platform.

Assignment flexibility: Clinics can let therapists choose from referral opportunities, have coordinators select and assign, or enable rule-based auto-assignment using configured availability and capacity. The clinic chooses the strategy, and it can be tailored.

Visit ntdy.io →