

WORKFLOW OVERVIEW

Review and compare referral candidates

Compare candidate response, travel, priority, and map context before choosing who should manage a referral. This guide shows the manual workflow; referral automation can alternatively handle selection, assignment, and reminders.

1 · OPEN

Find the active referral that needs a provider.

2 · COMPARE

Review all invited candidates in one summary.

3 · INSPECT

Use expanded cards to see travel and map context.

4 · DECIDE

Use the response and operational details together.

1 Open the referral that needs coverage

Start in Referrals, keep the Open Referrals view selected, and open Noah Patel's ICBC OT Community Assessment.

The screenshot shows the 'Referrals' web application interface. A sidebar on the left contains navigation icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main header includes a search bar, a user profile for Jordan Avery, and a notification bell with 99+ alerts. The 'Referrals' section title is at the top, with an 'Add Referral' button. Below this is a 'Quick Stats' section with a 'SYSTEM VIEWS' dropdown menu. The dropdown menu is open, showing options: 'All Referrals' (Show all active referrals regardless of status.), 'Open Referrals' (Show referrals awaiting my response., marked with a checkmark), 'Assigned Referrals' (Show all referrals that have been assigned.), 'Deleted Referrals' (Show only referrals that have been soft-deleted.), and 'Clear View'. The background shows a dashboard with cards for 'ASSIGNED REFERRALS', 'WAITLIST' (6), 'LOST' (6), 'TOTAL REJECTED' (0 Candidates), and 'ALL REFERRALS' (63). At the bottom, a table lists referrals with columns: Title, Status, Invited, Accepted, Rejected, Created At, and Actions.

Title	Status	Invited	Accepted	Rejected	Created At	Actions
Home Care OT — Fraser Health	Referral	1	0	1	Sep 30, 2026	⋮
ICBC OT Community Assessment — Noah Patel	Referral	4	1	1	Sep 30, 2026	⋮
Growth Allocation Fixture — Insufficient Evidence 01	Referral	0	0	0	Sep 20, 2026	⋮

Review the four-person candidate summary

The referral brings the invited candidates together with travel time, distance, priority, response status, message thread, and latest activity.

The screenshot displays a web application interface for managing a referral. The top navigation bar includes a search bar, a user profile for Jordan Avery, and a notification bell. The main header shows the referral title 'ICBC OT Community As...' with a 'REFERRAL' tag and 'APPROVAL CONFIRMED' status. Below the header, there are two summary cards: 'CANDIDATES 4 invited' and 'AUTOMATION Off'. The 'Candidates' section features a table with the following data:

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

Below the table, there are sections for 'Description' (Synthetic ICBC community occupational therapy assessment), 'Consult Responses' (No specialist response recorded yet), and 'Attachments' (0 files). On the right, the 'Client' section shows 'Noah Patel' with contact information and location. The 'Assigned Provider' section shows 'Not assigned yet' with an 'Assign' button. A 'Feedback' button is visible on the far right.

3

Inspect Maya Chen's expanded card

Maya's card keeps her accepted response, priority score, travel estimate, and map visible together. The map shows the client location alongside candidate markers.

The screenshot displays the 'Referral Candidates' interface. At the top, there's a navigation bar with a search bar, a user profile 'Jordan Avery', and a notification bell. Below this, the 'Referral Candidates' title is followed by 'CARDS' and 'TABLE' view toggles. A filter section includes a 'Select All' checkbox, a 'Status' dropdown set to 'All', and a 'Search referrals...' input. To the right are 'COMPACT' and 'EXPANDED' view toggles, and a 'SORT: MOST AVAILABLE' dropdown. A status bar shows counts: 4 All, 0 Draft, 4 Invited, 2 Responded, 1 Rejected, 0 Conditional Accept, and 1 Accepted. The main area features Maya Chen's expanded card. Her card includes a profile picture 'MC', name 'Maya Chen', title 'Occupational Therapist', and buttons for 'Invited' and 'Accepted'. It also shows '14 pts', 'Rank #999', and travel details: '4.1 km', '13min', and 'N/A available'. The bottom half of the card is a map of the Vancouver area, highlighting 'Burrard Inlet', 'Stanley Park', 'English Bay', 'WEST END', 'University Endowment Lands', and 'Granville Island Public Market'. A green circle with the number '1' is overlaid on the map near Granville Island. A 'Feedback' button is visible on the right side of the interface.

4

Continue through Priya Sharma's map

Scroll slowly through the expanded cards so the geographic relationship remains readable. Priya's map provides the same location context for a direct comparison.

The screenshot displays the 'Referral Candidates' interface. At the top, there's a navigation bar with a back arrow and the title 'Referral Candidates'. To the right of the title are two tabs: 'CARDS' (selected) and 'TABLE'. Below the navigation bar, there's a filter section with a 'Select All' checkbox, a 'Status' dropdown menu set to 'All', and a search bar labeled 'Search referrals...'. To the right of the search bar are two view options: 'COMPACT' and 'EXPANDED' (selected). Further right is a 'SORT: MOST AVAILABLE' dropdown menu. On the left side of the interface is a vertical sidebar with icons for 'Work', 'Money', 'Inbox', 'Reports', 'Team', 'Tools', and 'Settings'. The main content area is divided into two sections. The top section shows a map of the Dunbar-Southlands area, including labels for 'DUNBAR-SOUTHLANDS', 'SHAUGHNESSY', 'KERRISDALE', and 'MUSQUEAM FIRST NATION'. The bottom section displays a profile card for 'Priya Sharma', an Occupational Therapist. The card includes a profile picture with the initials 'PS', a status 'On vacation', and a 'RESPOND' button. Below the name, there are tags for 'Invited', 'Pending', '36 pts', and 'Rank #999'. Further down, it shows a location pin icon, '13.8 km', a car icon, '32min', and a clock icon, 'N/A available'. At the bottom of the card is another map showing 'Mount Seymour Park' and 'Lynn Creek'. A 'Feedback' button is located on the right side of the interface.

5

Review Daniel Kim's map in context

Daniel's response is already recorded as rejected, while the expanded view still preserves the travel and map information that informed the comparison.

The screenshot displays the 'Referral Candidates' interface in an expanded view. The interface includes a sidebar on the left with navigation icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area shows a candidate profile for Daniel Kim, an Occupational Therapist, with a status of 'Declined', 22 points, and Rank #999. Below the profile, a map of Vancouver is shown with a red pin at UBC. The map includes labels for Burrard Inlet, Stanley Park, Kitsilano, MT Pleasant, East Vancouver, Kerrisdale, South Vancouver, Bridgeport, and the Fraser River. A green circle with the number '1' is visible on the map. The interface also features a top navigation bar with a back arrow, the title 'Referral Candidates', and buttons for 'CARDS' and 'TABLE'. A search bar and a 'Select All' checkbox are also present. The bottom of the interface shows a 'Feedback' button.

6

Finish with Grace Okafor

Grace's card shows that her response is still pending, along with her priority, travel estimate, and map. At this point every candidate has been reviewed using the same details.

The screenshot displays a web application interface for managing referral candidates. The top navigation bar includes a search bar, a user profile for Jordan Avery, and a notification bell with 99+ alerts. The left sidebar contains a vertical menu with icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area features a map of the Richmond, BC area, showing locations like Kerrisdale, South Vancouver, Bridgeport, Sea Island, and Seafair. Three green location pins are marked on the map, numbered 1, 2, and 3. Below the map is a card for Grace Okafor, an Occupational Therapist. The card shows her status as 'Invited' (in a green box) and 'Pending' (in a grey box), with 47 points and a rank of #999. It also displays a travel estimate of 20.1 km and 42 minutes, and a note that N/A is available. A 'RESPOND' button is visible next to the card. The bottom right corner of the interface has a 'Feedback' button.

A consistent comparison before assignment



All candidates use the same view.

Response, priority, travel, and map context remain comparable.



The maps stay readable.

Expanded cards can be reviewed one at a time as the coordinator scrolls.



Manual choice remains available.

The coordinator can review the details and decide who to assign.



Automation is an alternative.

Referral automation can perform selection, assignment, and reminders instead.

Explore InToday

Bring referral intake, candidate comparison, 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](https://ntdy.io) →