

REFERRAL SETTINGS

Set travel and workload preferences for referrals

Create a referral setting for Maya Chen that defines where travel starts, how far she can travel, her weekly workload, and how she wants to hear about new matches.

1 • IDENTIFY

Name the setting and select the team member.

2 • TRAVEL

Set the starting address, travel mode, and time limit.

3 • CAPACITY

Record the weekly workload limit.

4 • NOTIFY

Choose acceptance, notification, channel, and backup preferences.

1

Name the referral setting

Create **Regular Work** for Maya Chen. A clear name helps distinguish this setting when a person has more than one referral profile.

Create Referral Setting

Basic Information
For Maya Chen, named 'Regular Work'

Referral Setting Name *
Regular Work

Useful if you have multiple referral settings for the same user.

User
Maya Chen

CONTINUE

Travel & Location
Max travel: 45min

Workload Limits
Max hours/week: 40

Preferences & Notifications
Auto-accept: No; Notify: Yes; Backup: No

Confirm and Save

2

Define the travel area

Use the North Vancouver starting address, select **Driving**, and set a maximum travel time of **45 minutes**.

Create Referral Setting

☒ **Basic Information**
For Maya Chen, named 'Regular Work'

☒ **Travel & Location**
From: 141 W 14th St, North Vancouver, BC V7M 1H9, Canada; Max travel: 45min

Starting Address
141 W 14th St, North Vancouver, BC V7M 1H9, Canada

☒ Driving ☐ Transit ☐ Biking ☐ Walking

Max Travel Time (minutes)
45

CONTINUE **BACK**

☐ **Workload Limits**
Max hours/week: 40

☐ **Preferences & Notifications**
Auto-accept: No; Notify: Yes; Backup: No

☐ **Confirm and Save**

Feedback

3

Set the weekly workload limit

Record **40** as the maximum weekly hours. This gives the referral setting a clear capacity limit.

Create Referral Setting

- ✓ **Basic Information**
For Maya Chen, named 'Regular Work'
- ✓ **Travel & Location**
From: 141 W 14th St, North Vancouver, BC V7M 1H9, Canada; Max travel: 45min
- Workload Limits**
Max hours/week: 40
Max Weekly Hours
40
- **Preferences & Notifications**
Auto-accept: No; Notify: Yes; Backup: No
- 🔒 **Confirm and Save**

CONTINUE **BACK**

Feedback

4

Choose how new matches are handled

Keep auto-accept off, turn notifications on, use email as the notification channel, and leave backup status off.

Create Referral Setting

✓ **Basic Information**
For Maya Chen, named 'Regular Work'

✓ **Travel & Location**
From: 141 W 14th St, North Vancouver, BC V7M 1H9, Canada; Max travel: 45min

✓ **Workload Limits**
Max hours/week: 40

✎ **Preferences & Notifications**
Auto-accept: No; Notify: Yes; Backup: No

Auto Accept
Automatically accept referral matches that meet all your criteria.

☐ Yes ☒ No

Notifications
Receive a notification for new referral matches.

☒ Yes ☐ No

Notification Channels

Notify via SMS
☐ Yes ☒ No

Notify via Email
☒ Yes ☐ No

Notify via MS Teams
☐ Yes ☒ No

Use as Backup
Be considered for referrals if the primary matched person is unavailable.

☐ Yes ☒ No

REVIEW & SAVE **BACK**

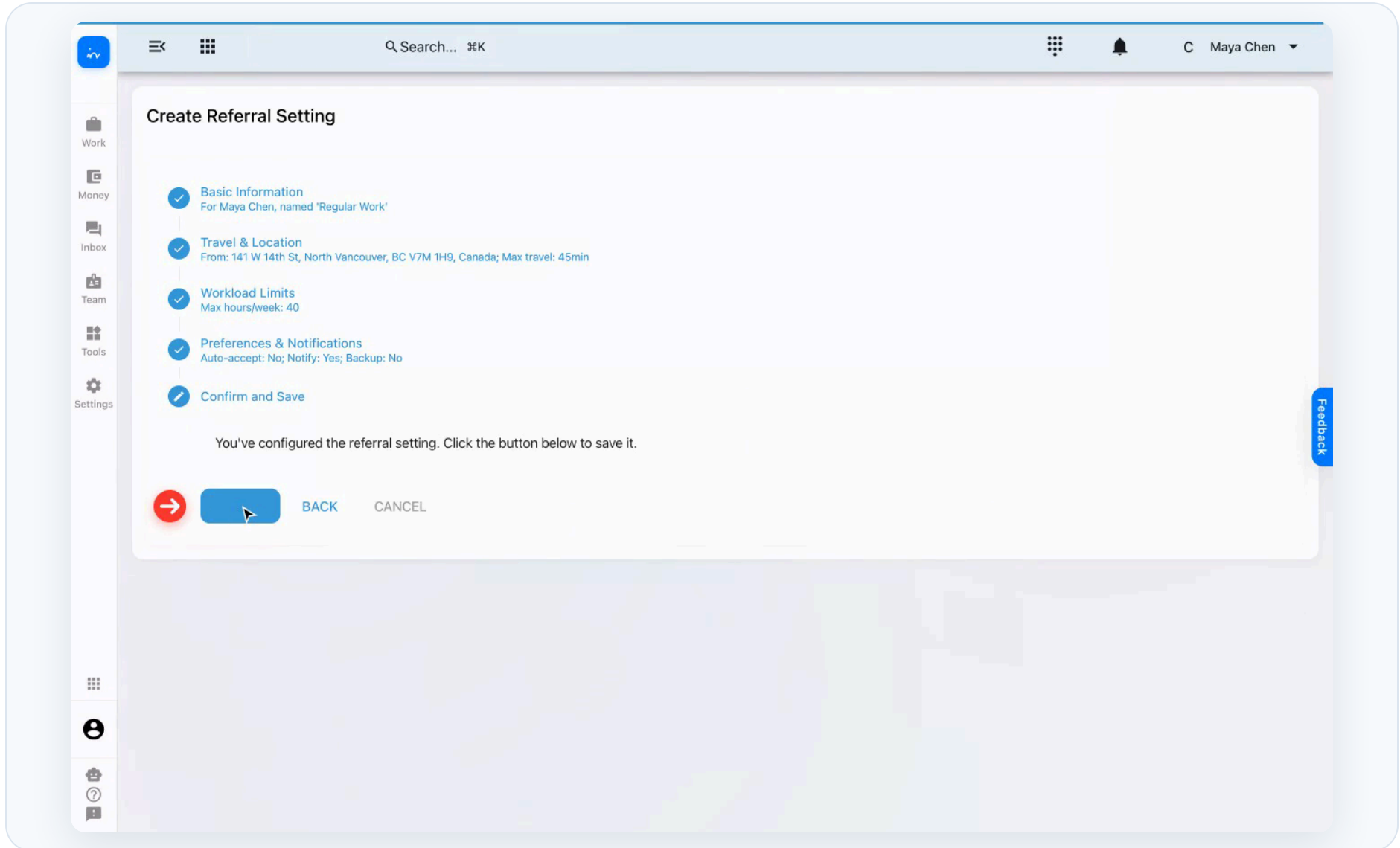
Confirm and Save

Feedback

5

Review the completed setting

The summary shows the selected person, travel boundary, workload, and notification choices together. Review them before saving.



A reusable referral profile for regular work



Travel starts from a known location.

The setting uses the North Vancouver address and driving mode.



The travel boundary is explicit.

Matches can be evaluated against a 45-minute maximum.



Weekly capacity is recorded.

The profile shows a 40-hour weekly limit.



Email notifications are enabled.

Maya can review matches before accepting them.

Explore InToday

Bring referral matching, scheduling, client care, travel, and team workflows 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.

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