



REFERRALS UPGRADE USER GUIDE

Version 01
June 2024

Referrals Upgrade Prep

01 Upgrade Overview

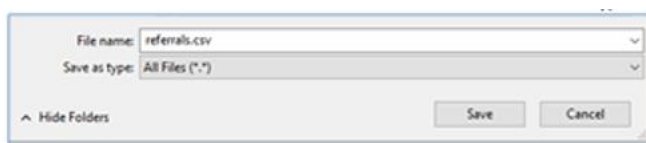
On Wednesday, July 17th, the ReferralsPlus platform will be upgraded to the new Referrals platform. This platform upgrade will allow Referrals users to benefit from a better user experience, and provide access to future updates.

There are some steps that ReferralsPlus users will need to complete ahead of upgrading to the new Referrals platform to ensure a seamless transition experience: Exporting ReferralsPlus data (both historical data and active referral data), and uninstalling the ReferralsPlus platform prior to installation of the new Referrals platform.

02 Exporting ReferralsPlus Data

Prior to upgrading on July 17th, ReferralsPlus users are encouraged to export all referrals data. Please note that any active referrals will need to be re-created in the new Referrals platform: **There will be no data migration from ReferralsPlus to new Referrals.** Please follow the steps below to export ReferralsPlus data.

1. Export/Download the **Referrals Worklist**.
2. The file will include more information than is displayed in the Referral Application. (Only export worklists of less than 9,999 referrals at a time.)
3. When the desired worklist is displaying in the worklist panel, click the **export/download** button.
4. Select a folder to save the file in. **Remember that the document will have PHI in it.**
5. Name the file and leave the “.csv” at the end of name. Select “All Files” as the file type and click **Save**.



6. At this point, some users will need to complete an **Import Wizard**, which tells the computer how to divide your data. The data is delimited using tabs and commas. The data within the file is a combination of text, numbers (general), and dates.
7. Open the computer application that you will use to open the file. For many users, this will be Microsoft Excel.
8. At the top of the application, click **File**, then click **Open**. Navigate to or search for the **.csv file** you just saved.
9. Click on the **file** and then click **Open**.
10. Please confirm that the referral data export contains all the data you need prior to uninstalling the v6 Referrals app. **Once the ReferralsPlus platform is uninstalled, the referral data will not be accessible again.**



03 Uninstalling ReferralsPlus

Once all ReferralsPlus data has been successfully exported, the ReferralsPlus platform will need to be uninstalled. Please follow the steps on your device(s) to uninstall the ReferralsPlus platform.

Please note that the ReferralsPlus platform will need to be uninstalled prior to installing the new Referrals platform. The two platforms cannot be used concurrently.

Uninstall the ReferralsPlus platform per the device's instructions.

04 Installing The New Referrals Platform

Once the ReferralsPlus platform has been uninstalled, the new Referrals platform can be installed. Please see the **Holon App Installation Guide** for step-by-step download & installation steps.

