HOLON USER GUIDE

Referrals

Version 03
December 2025

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Introduction

Welcome to the Referrals User Guide!

In this guide, you will find a detailed breakdown of Holon's Referrals web portal, including design elements, workflow instructions, and a complete walkthrough of the lifecycle of a referral.

If you experience any issues while using Referrals, please submit a request via the Holon Help Center or email **support@holonsolutions.com**.

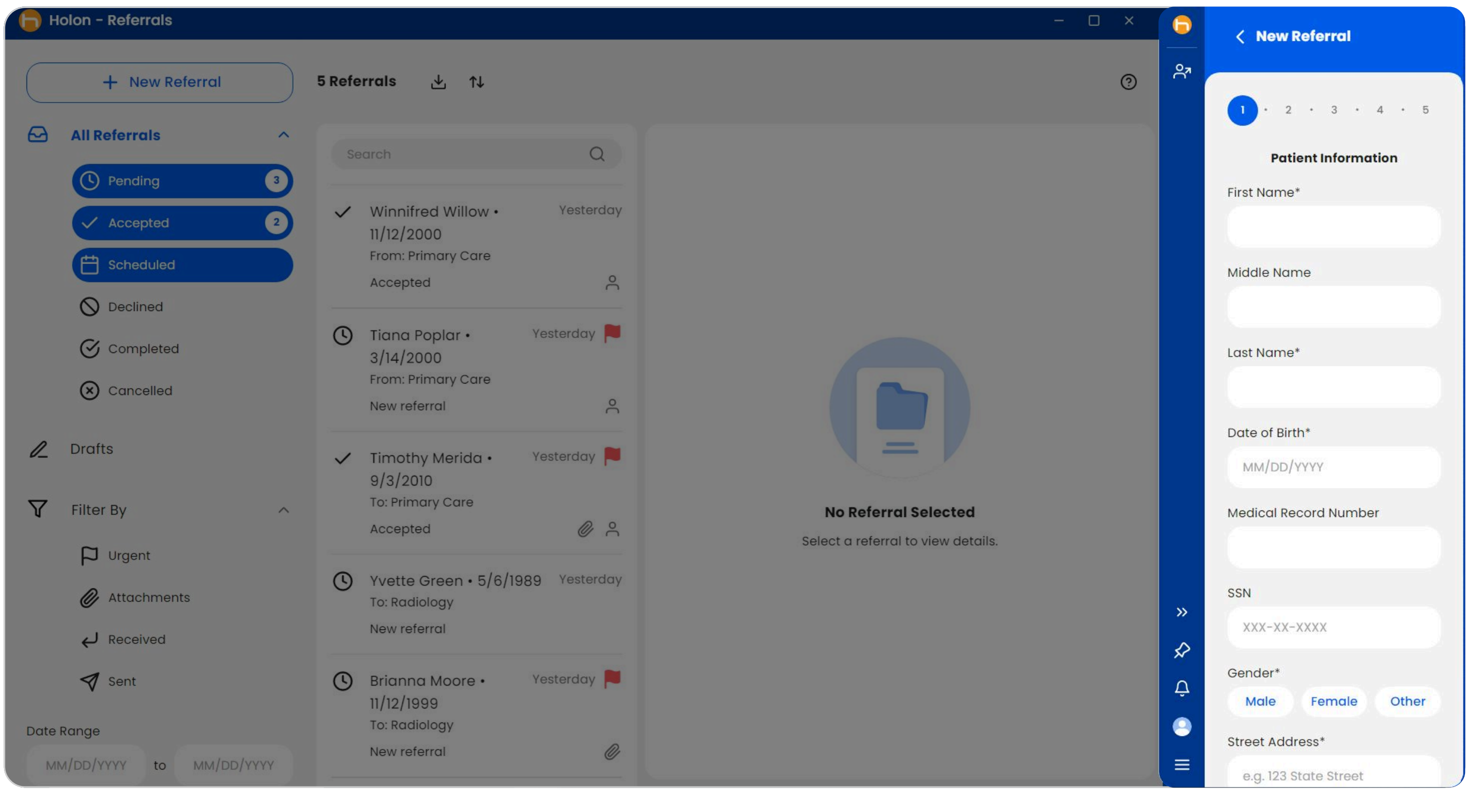
Holon Help Center	**help.holonsolutions.com**
Sign In	Sign in with your Holon credentials

Design Elements

The Holon Referrals consists of two content windows: the Inbox and the Ribbon.

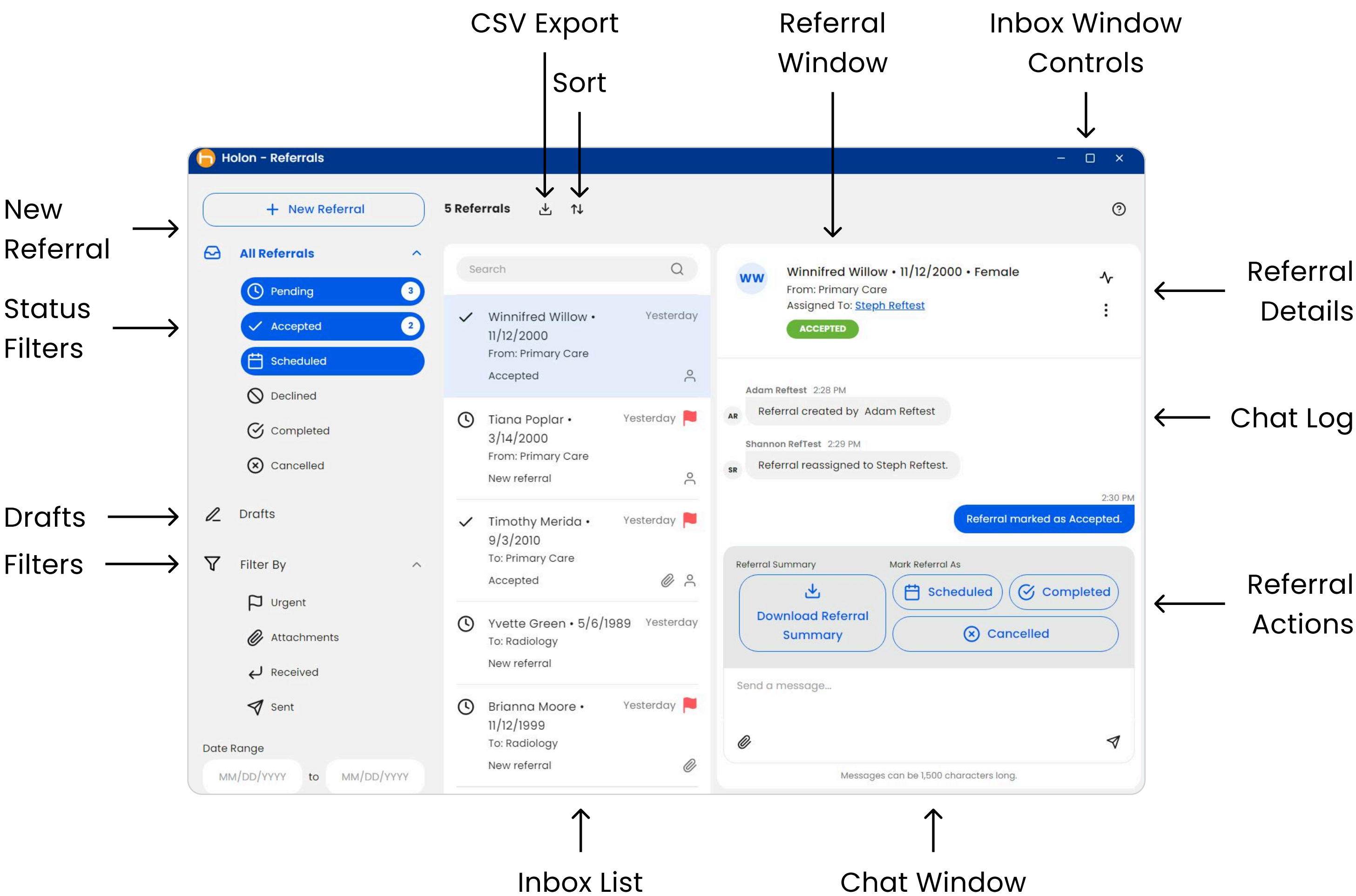
01 Ribbon Window (Right-hand panel)

In the Referrals workflow, the Ribbon window is used to create or edit referral forms, and to show status update modals where input is required.



02 Inbox Window

You can manage your referrals in the Inbox: a full-sized window containing a list of all your practice's referrals, a collection of sorting and filtering options, and a referral window where you can view and interact with individual referrals.



Referral Lifecycle

01 Status Definitions

The lifecycle of a referral follows a specific path, from creation to completion, consisting of the following statuses:

Draft: The referral form has been partially completed, but has not yet been sent. Requires saving as a draft.

Pending: The referral has been sent, but has not yet been accepted, declined, or cancelled. Referrals automatically have pending status after being submitted.

Accepted: The referral has been accepted by the receiver. Only the receiver can mark a referral as accepted.

Declined: The referral has been declined by the receiver. Only the receiver can mark a referral as declined. A reason must be provided for the decline.

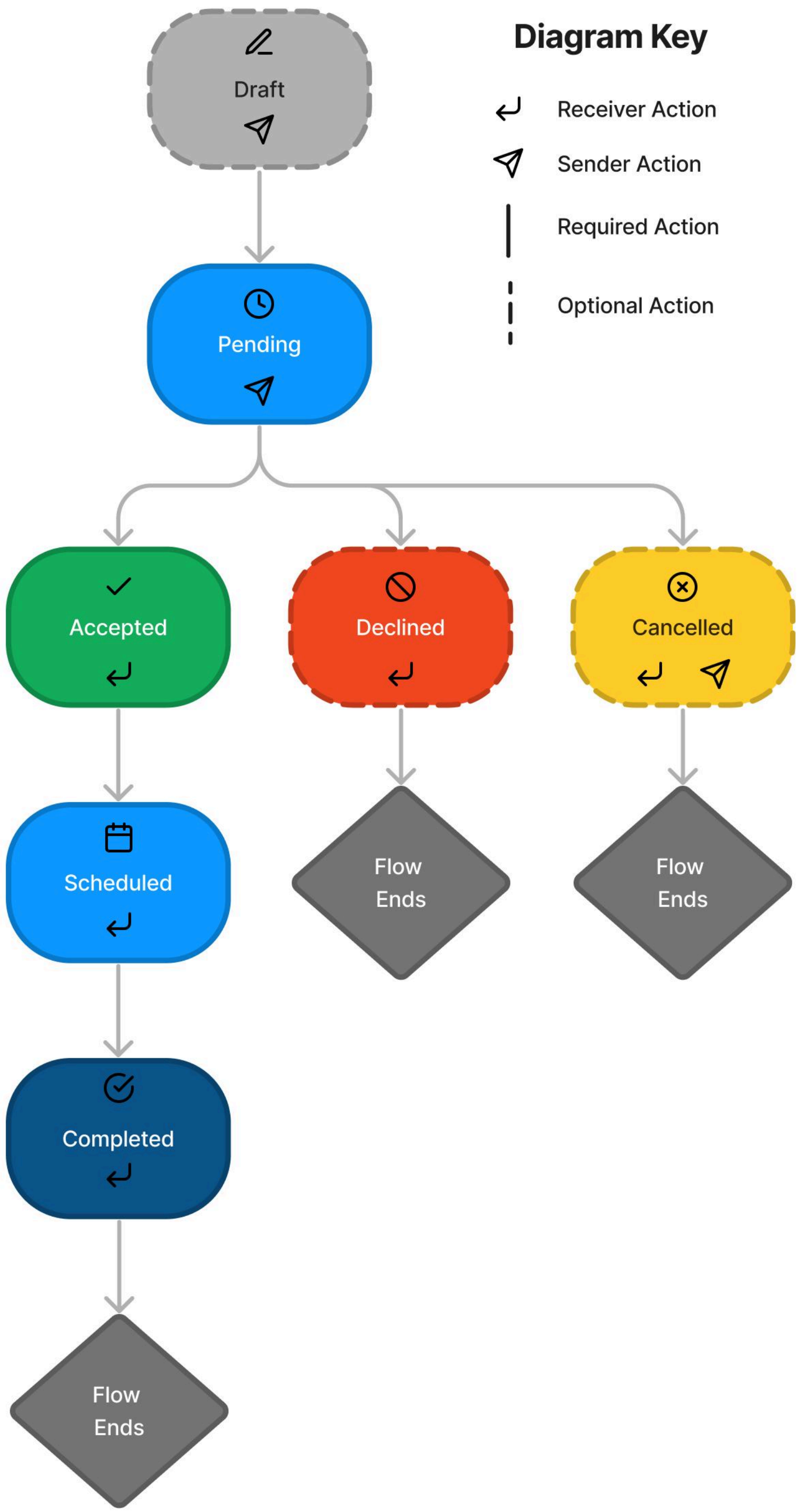
Cancelled: The referral has been cancelled by the sender or the receiver. A reason must be provided for the cancellation.

Scheduled: The referral has been scheduled. Either the sender or the receiver can mark a referral as scheduled. Referrals can be rescheduled if necessary.

- **Patient Notified:** The patient has been made aware of their referral appointment. Patient Notified status can be changed if necessary by clicking the Mark Referral As Scheduled button in the referral window.
- **Patient Not Notified:** The patient has not been made aware of their referral appointment. Patient notified status can be changed if necessary by clicking the Mark Referral As Scheduled button in the referral window.

Completed: The referral has been completed by the receiver. Only the receiver can mark a referral as completed. A reason must be provided for referral completion.

Referral Status Lifecycle



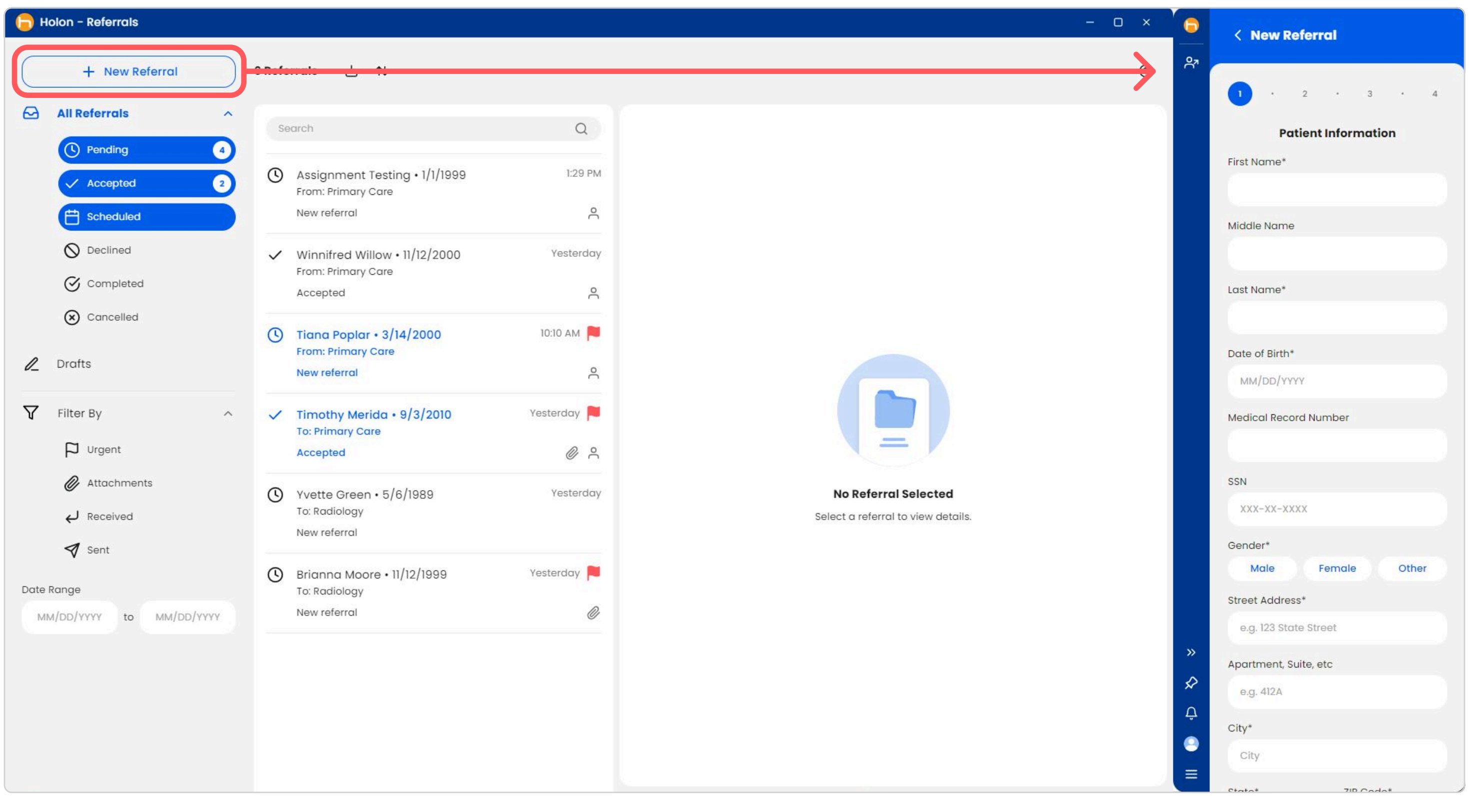
New Referral Workflow

01 New Referral Form

You can create a new referral by clicking on the “New Referral” button on the top left corner of the Referrals Inbox.

A Creating a New Referral From the Inbox

- To create a new referral from the Inbox, click the + New Referral button at the top left of the Inbox window. This will open a new referral form in the ribbon portion of the Holon app.
- From there, you can complete the referral form and submit it to your desired destination.

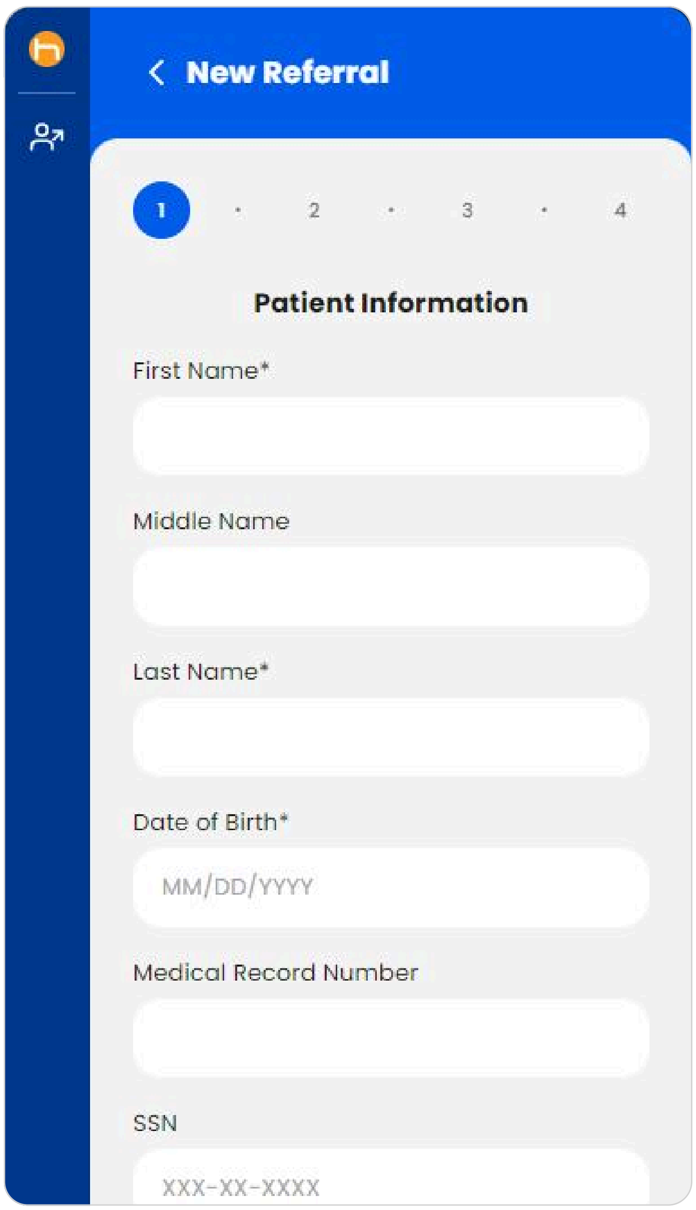


02 Referral Form Steps

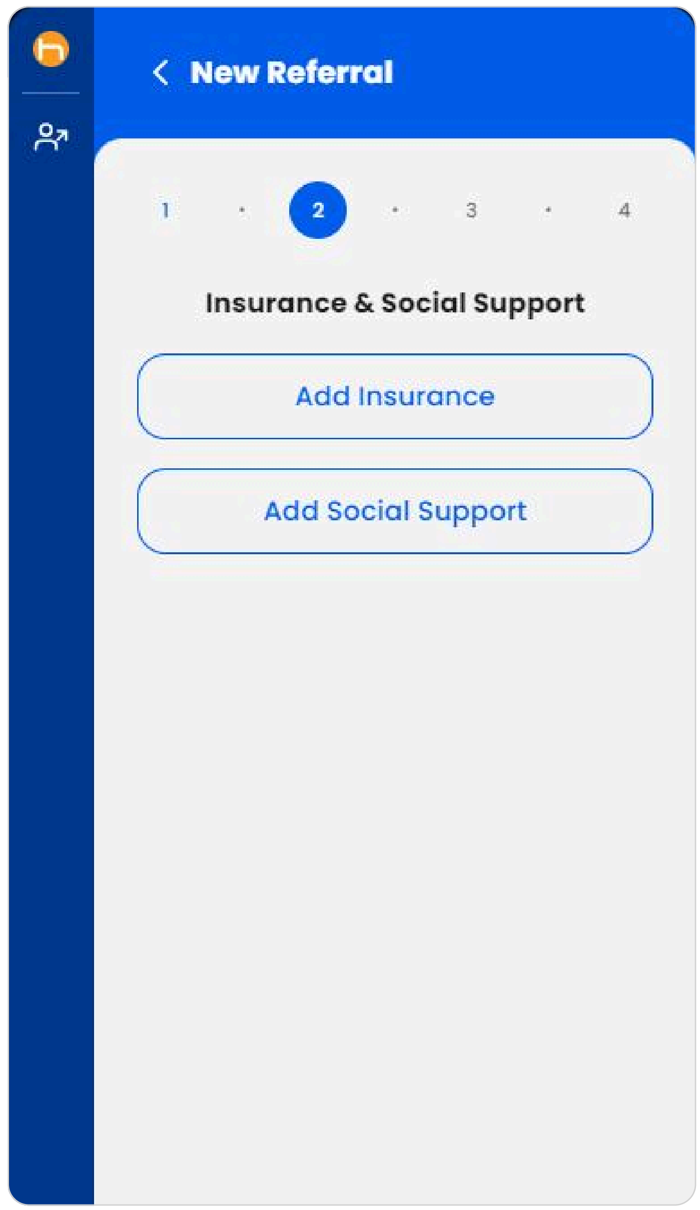
The referral form has four default steps, with an additional step that will show if the selected Referred To provider or practice has prepared a required questionnaire. The questionnaire will show on the referral form after making the Referred To selection.

After your referral form has been successfully submitted, it will automatically be sent to your specified recipient and show in the inbox with the pending status.

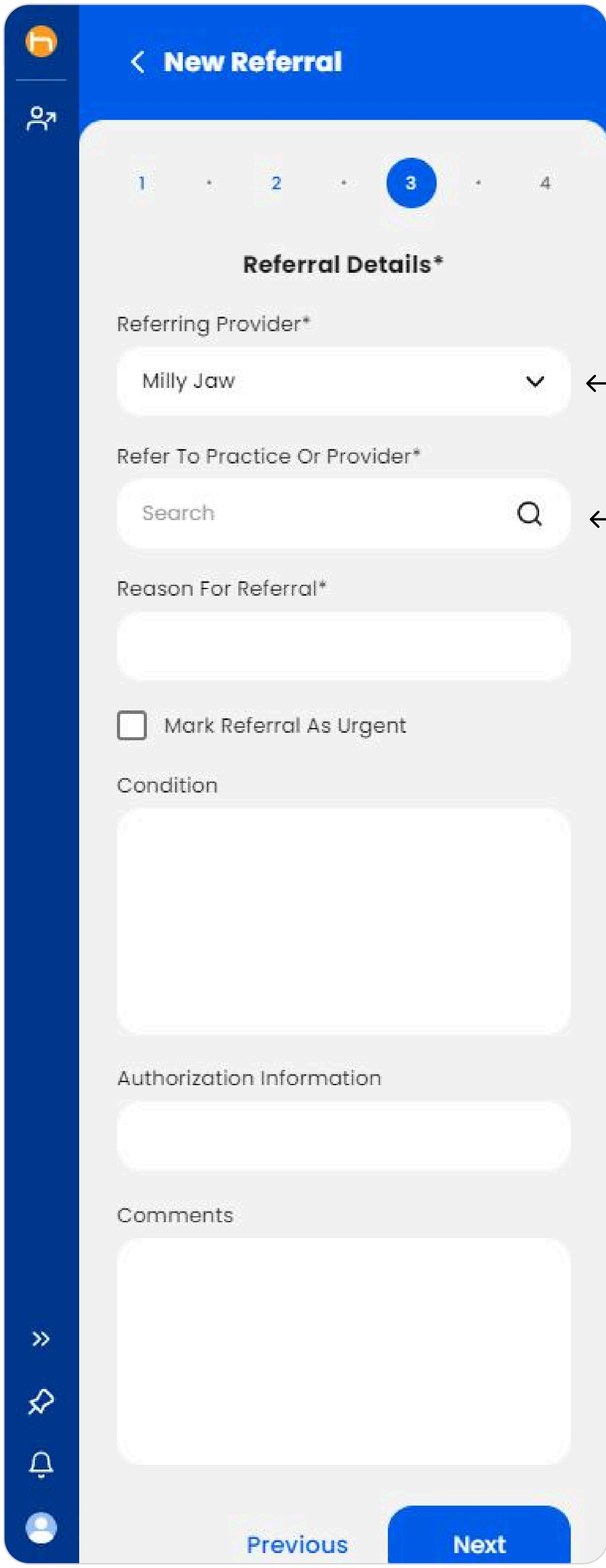
Step 1: Patient Information
Enter your patient's personal information.



Step 2: Insurance & Social Support *(optional)*
Add your patient's insurance and social support details.

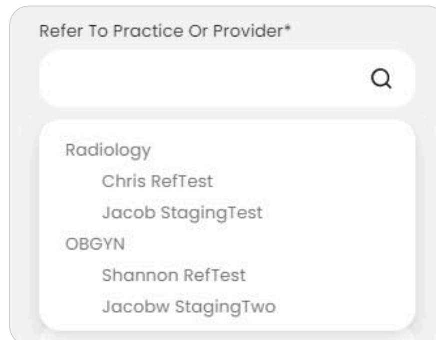


Step 3: Referral Details

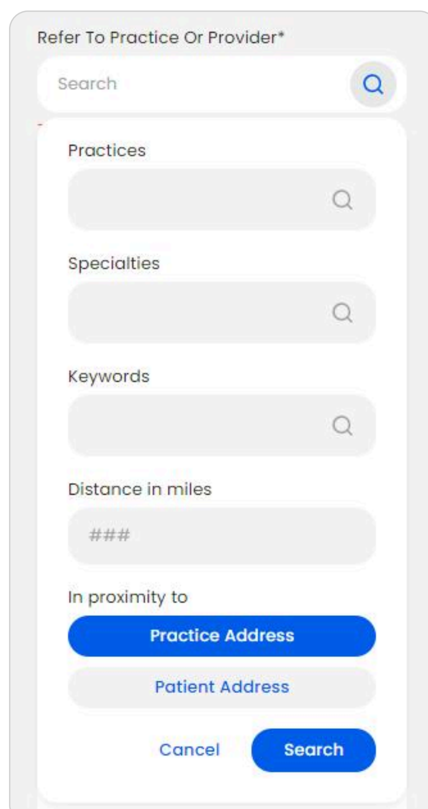


Select the Referring Provider. All users within your organization will be listed here.

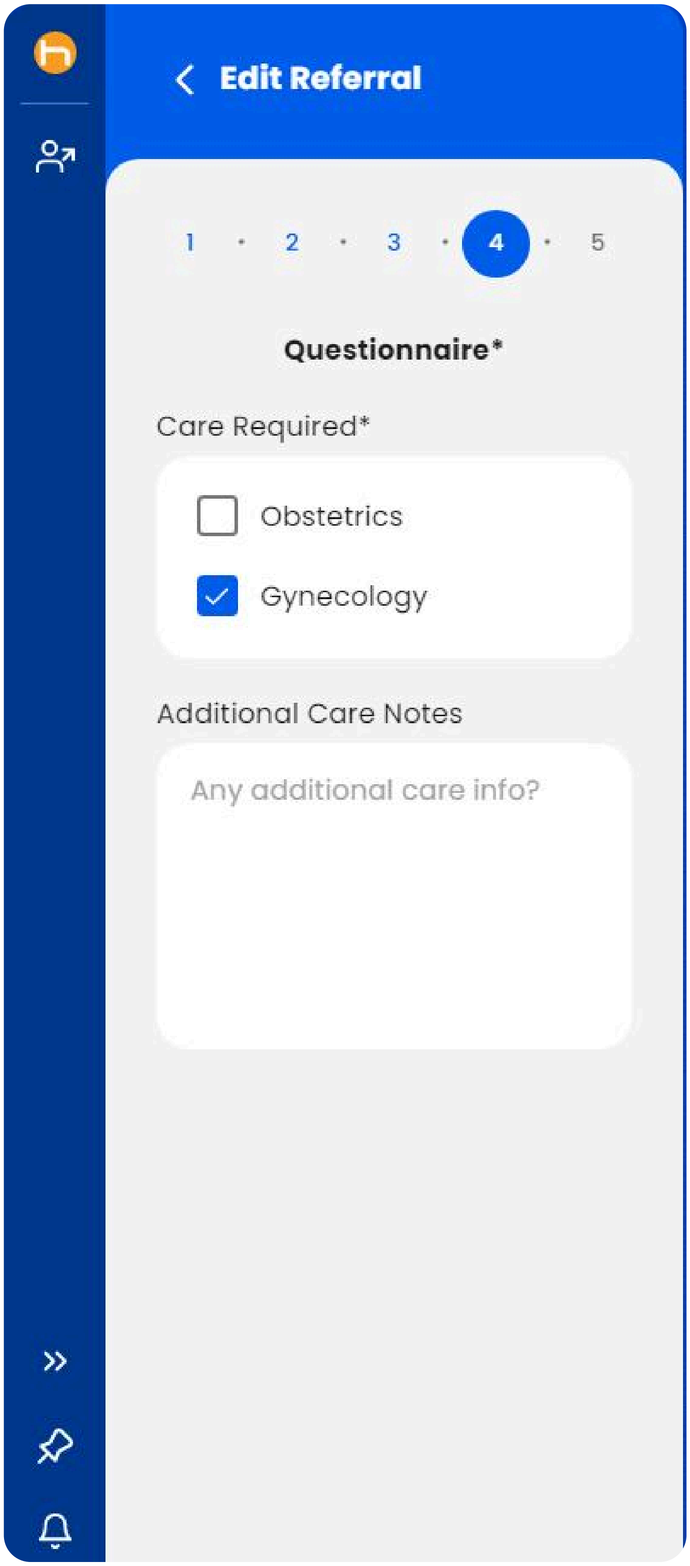
Select who to refer to using **quick search.** Click into the search bar to show a list of available practices and providers.



Select who to refer to using **advanced search**. Click the magnifying glass icon to show the advanced search criteria, then click the Search button to open the advanced search results window, where you can select who or where to refer to.

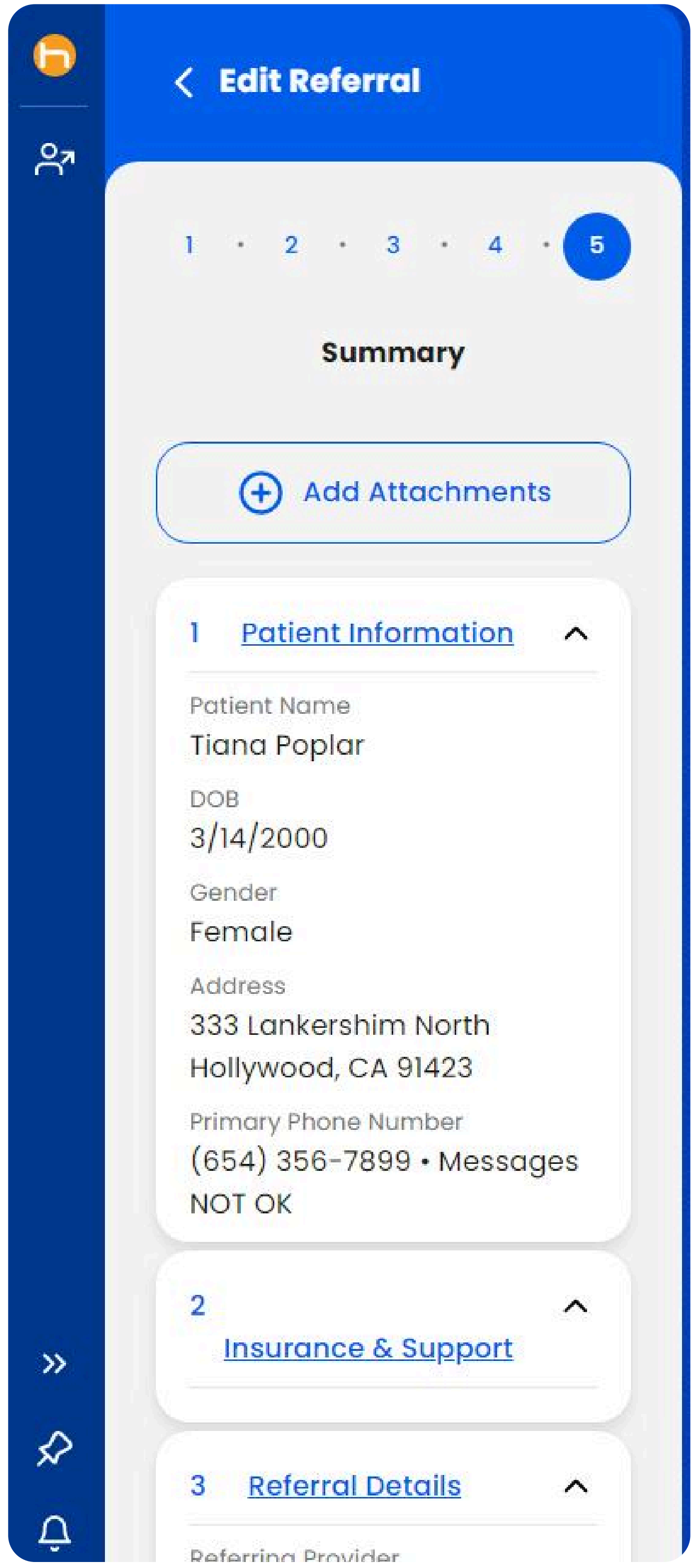


Step 4: Custom Questionnaire
(only shows if Referred To provider or practice has prepared a required questionnaire)



Step 5: Summary
(if no questionnaire is required, Summary will be shown as Step 4)

- Add attachments if desired
- Click the Submit button to submit your referral.

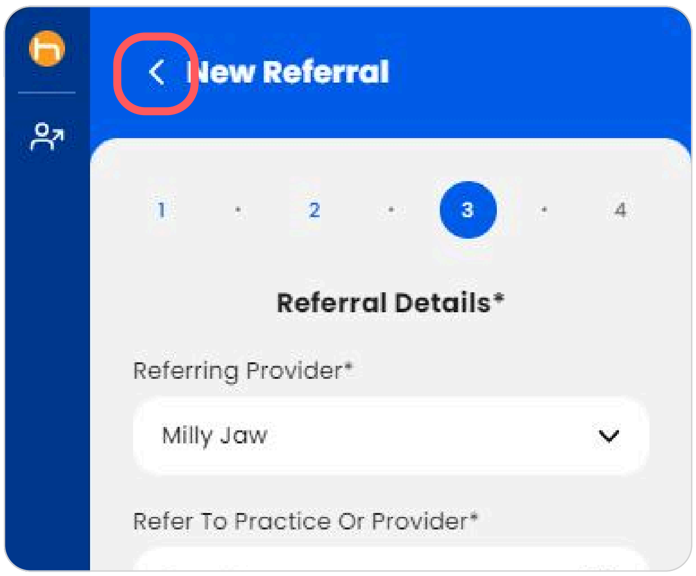


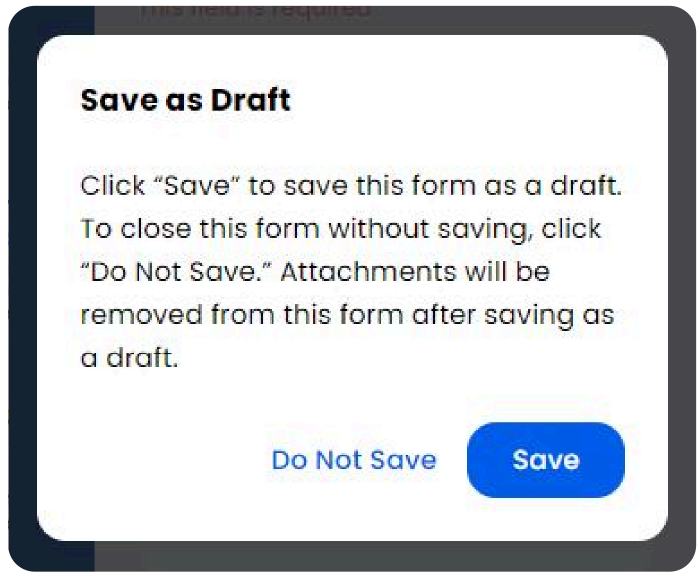
03 Saving a Referral Form as a Draft

You can save your referral form as a draft by clicking the back button in the referral form's header. You'll be prompted with the option to save or not to save the referral form.

A few notes about drafts:

- You'll need the patient's name and date of birth entered in order to save as a draft.
- Any attachments added to the form will be removed if the form is saved as a draft.
- Click Save to save your referral form as a draft.
- Click Do Not Save to close the referral form without saving. Please note that this will permanently delete your referral form.



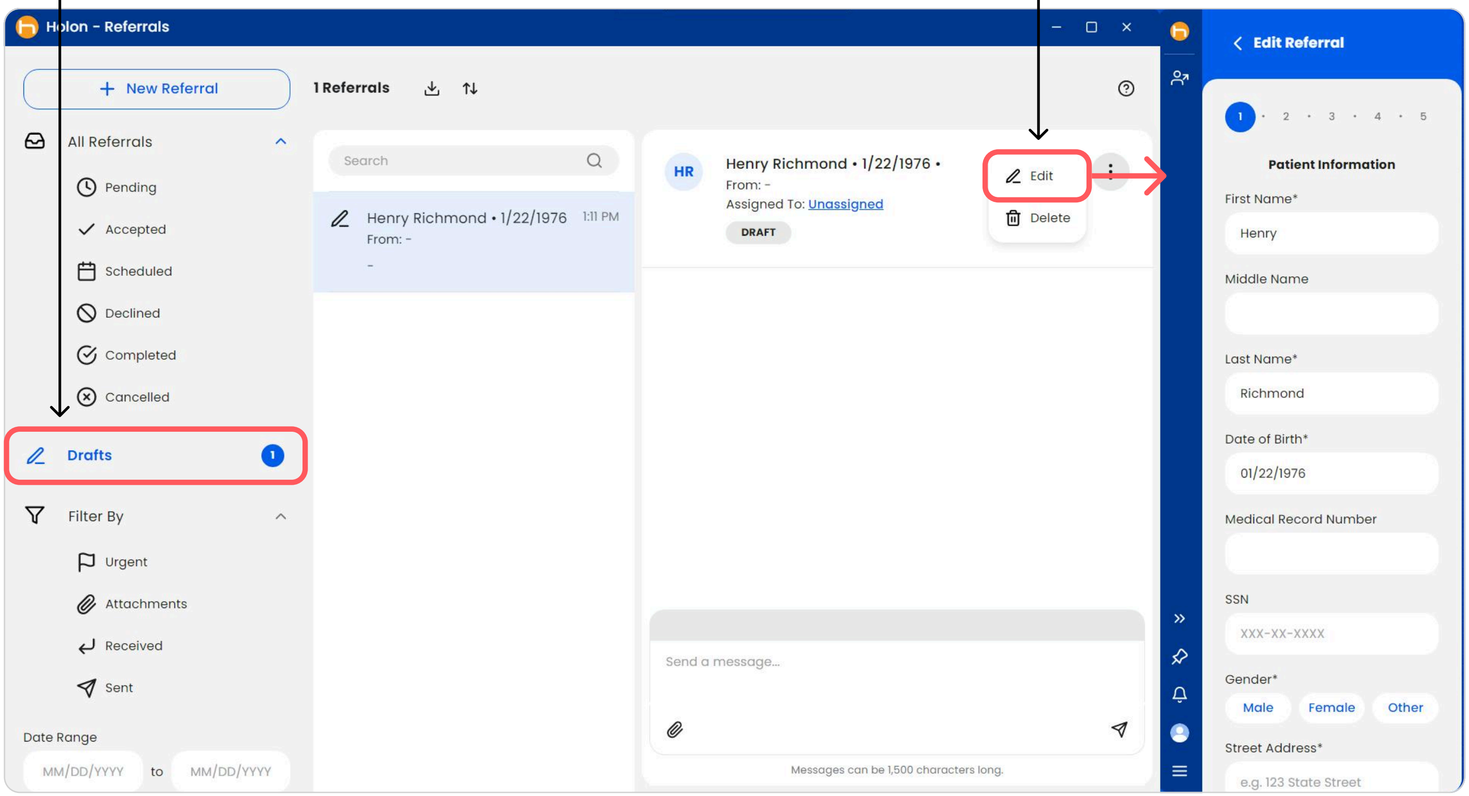


04 Editing a Draft Referral Form

Referral forms can be edited if they're in either the draft or pending statuses.

To resume editing a draft, click on Drafts in the inbox and select the desired draft.

Once opened in the referral window, click the Menu icon and click Edit. This will open the draft referral form in the ribbon, where you can resume work on the form.



Please note that drafts will not be recoverable once deleted.

05 Editing a Submitted Referral Form

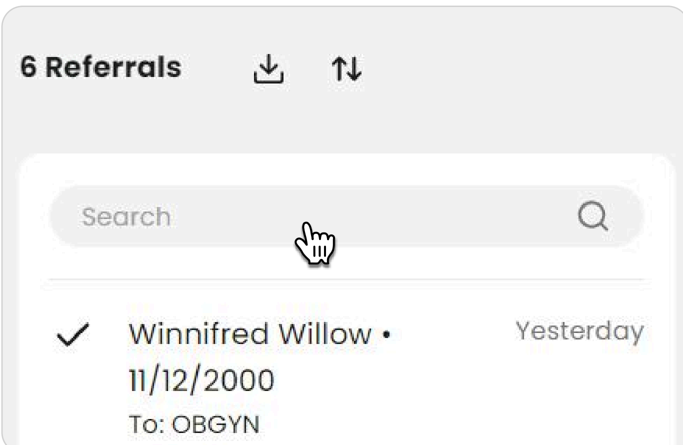
You can make any necessary edits to your referral form, even after submission, so long as it's in the pending status. Once the referral has been accepted by your recipient, you will not be able to make any edits to the referral form.

Inbox Features

The Referrals Inbox is where you can manage all of your practice's referrals. There's a collection of helpful sort & filter options, as well as a quick search feature that allows you to easily locate a specific referral.

01 Quick Search

A To use quick search, click into the search bar located on top of the referrals list, and type in your desired information.



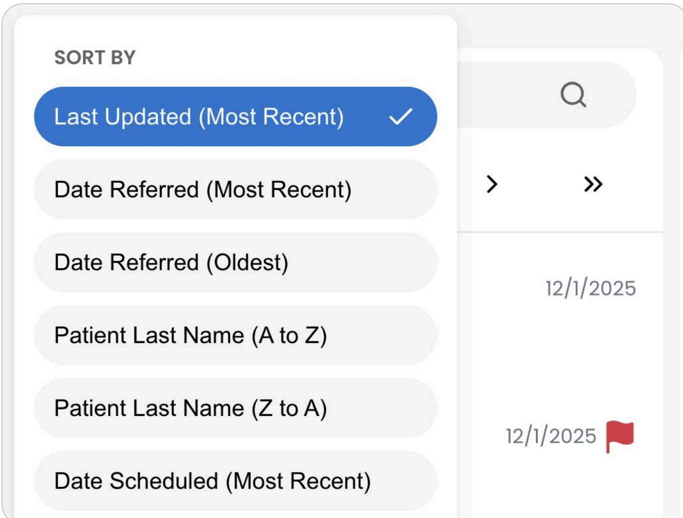
B Referrals can be searched using any of the following criteria:

- Patient name or full date of birth
- Referring or referred to provider or practice
- Assigned user's name

If status filters are selected, quick search will only search referrals shown. Unselect status filters to search all referrals in your inbox. By default, Pending, Accepted, and Scheduled is selected.

02 Sort

You can apply a sort style to your inbox to organize your list of referrals. By default, the Last Updated (Most Recent) sort is applied. Only one sort can be applied at a time.

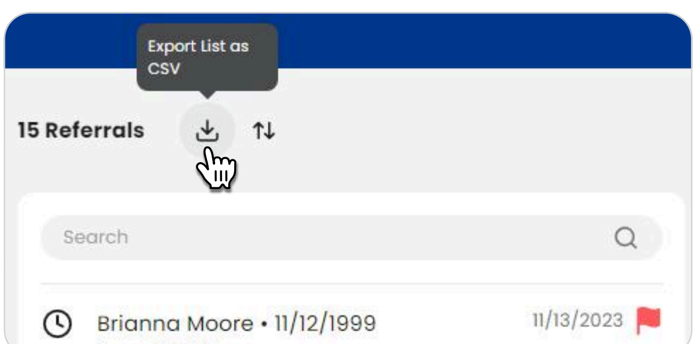


To apply a sort style to your inbox, click the sort icon on the top of the inbox window, and click one of the following sorts:

- Last Updated (Most Recent)
- Date Referred (Most Recent)
- Date Referred (Oldest)
- Patient Last Name (A to Z)
- Patient Last Name (Z to A)
- Date Scheduled (Most Recent)
- Date Scheduled (Oldest)

03 CSV Export

A To export your entire referral inbox list as a CSV file, click the export icon at the top of the inbox.



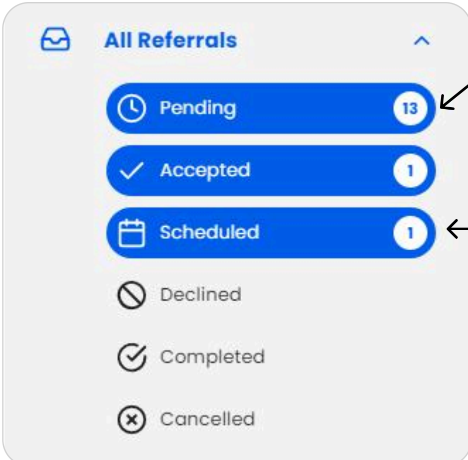
B Select a location to save your CSV file and rename the CSV file, if desired.

Please be aware that your CSV file will contain confidential PHI and the storage and access of your CSV file must meet current HIPAA standards.

04 Filters

A Status Filters - You can organize your inbox by selecting any number of status-specific filters:

- Pending
- Accepted
- Scheduled
- Declined
- Completed
- Cancelled



The total number of referrals with a given status will be shown next to the status filter.

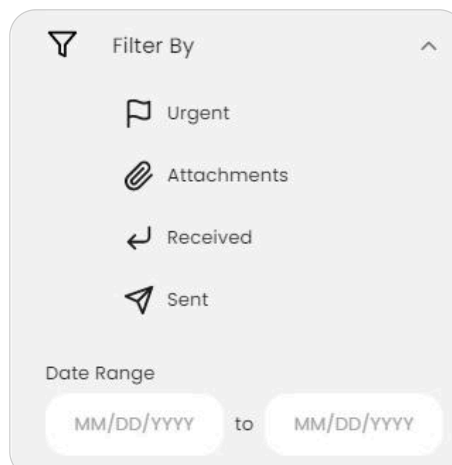
By default, referrals with actionable statuses (those with Pending, Accepted, & Scheduled statuses) are selected, and referrals with non-actionable statuses (Cancelled, Declined, & Completed statuses) are unselected.

When status filters are selected, the inbox will only show referrals that match the selected statuses. To show all referrals regardless of status, unselect all status filters.

B More Filters - In addition to Status Filters, you can further filter your inbox with the following criteria:

- Urgent (shows referrals marked as urgent)
- Attachments (shows referrals with attachments)
- Received (shows referrals your organization has received)
- Sent (shows referrals your organization has sent)
- Date Range (enter full date)

Multiple filters can be applied at the same time.

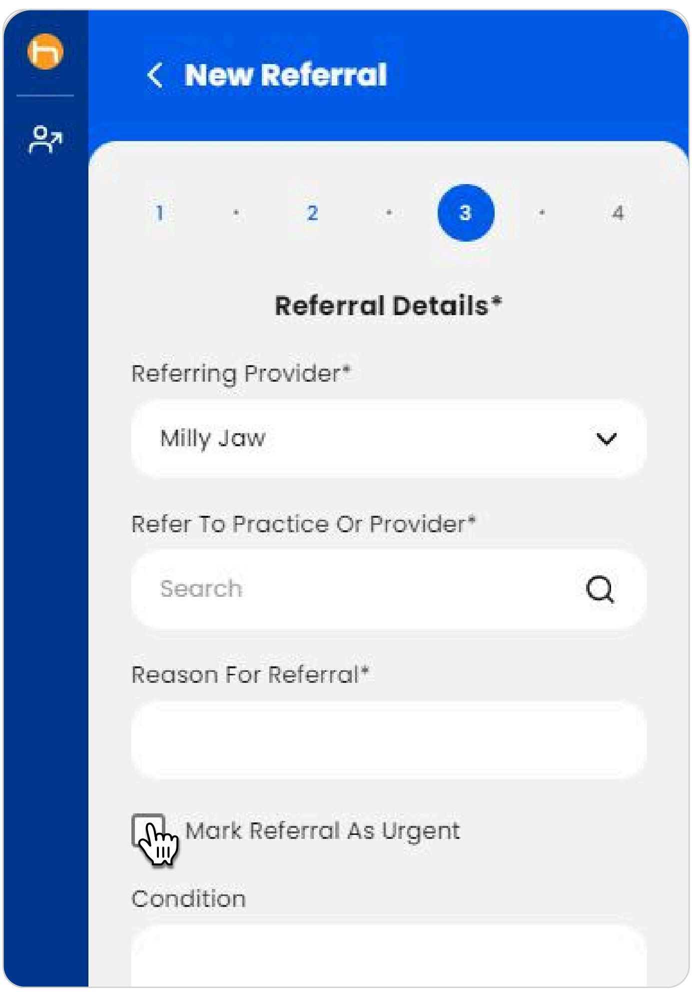


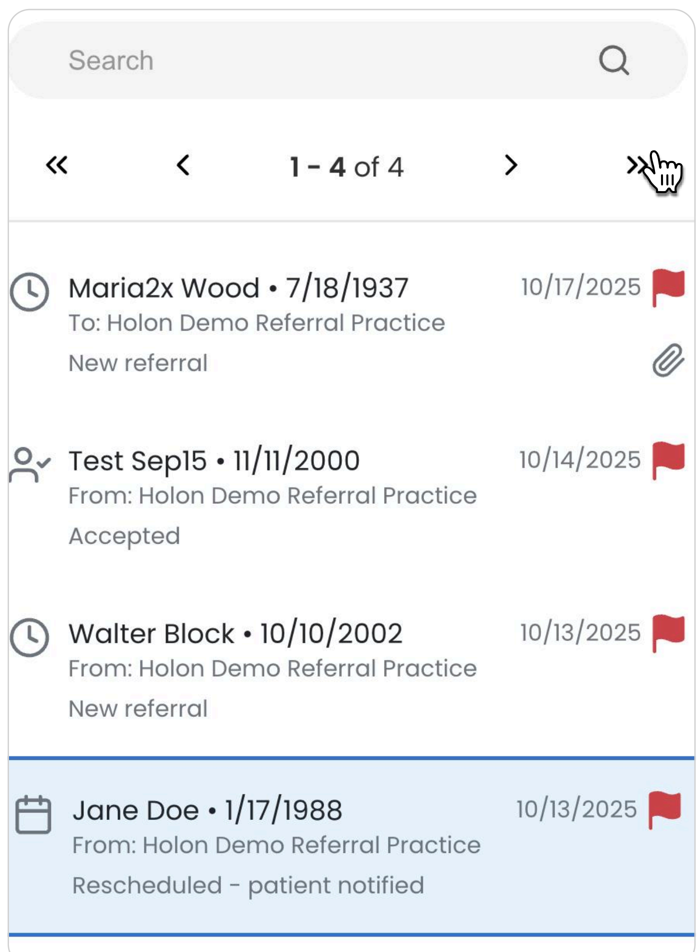
05 Urgent Flag

You can mark a referral as urgent to help manage your inbox. The Urgent filter can also be used to show only urgent referrals in your inbox.

A New Referral Form - To mark a referral as urgent, check Mark Referral As Urgent on the Referrals Detail step.

B Inbox - Urgent referrals will have a filled red flag icon in the Inbox.





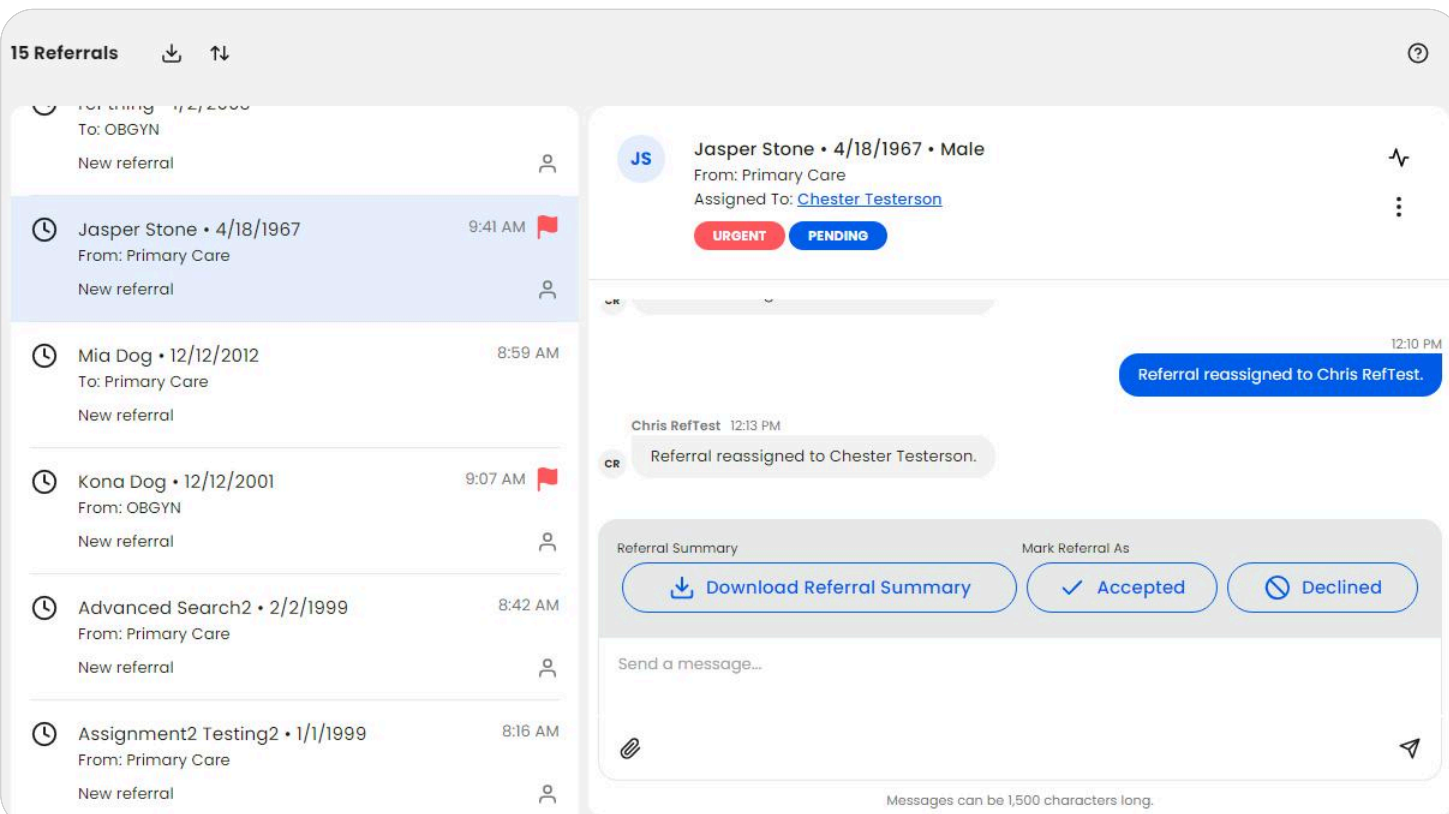
Managing a Referral

All members in your organization will have full access to manage referrals, even if a referral has been assigned. Note that some actions are sender or receiver-specific.

01 Referral Window

Locate your desired referral from the inbox list and click on it. This will open the referral window, where you can:

- View the referral's details, like the patient's information, the referral's assignee, current status, etc.
- Update the referral's status.
- Chat with other users involved with the referral.
- Send, receive, and open attachments.
- Download the referral's summary file (a PDF listing the referral's history at the time of download).



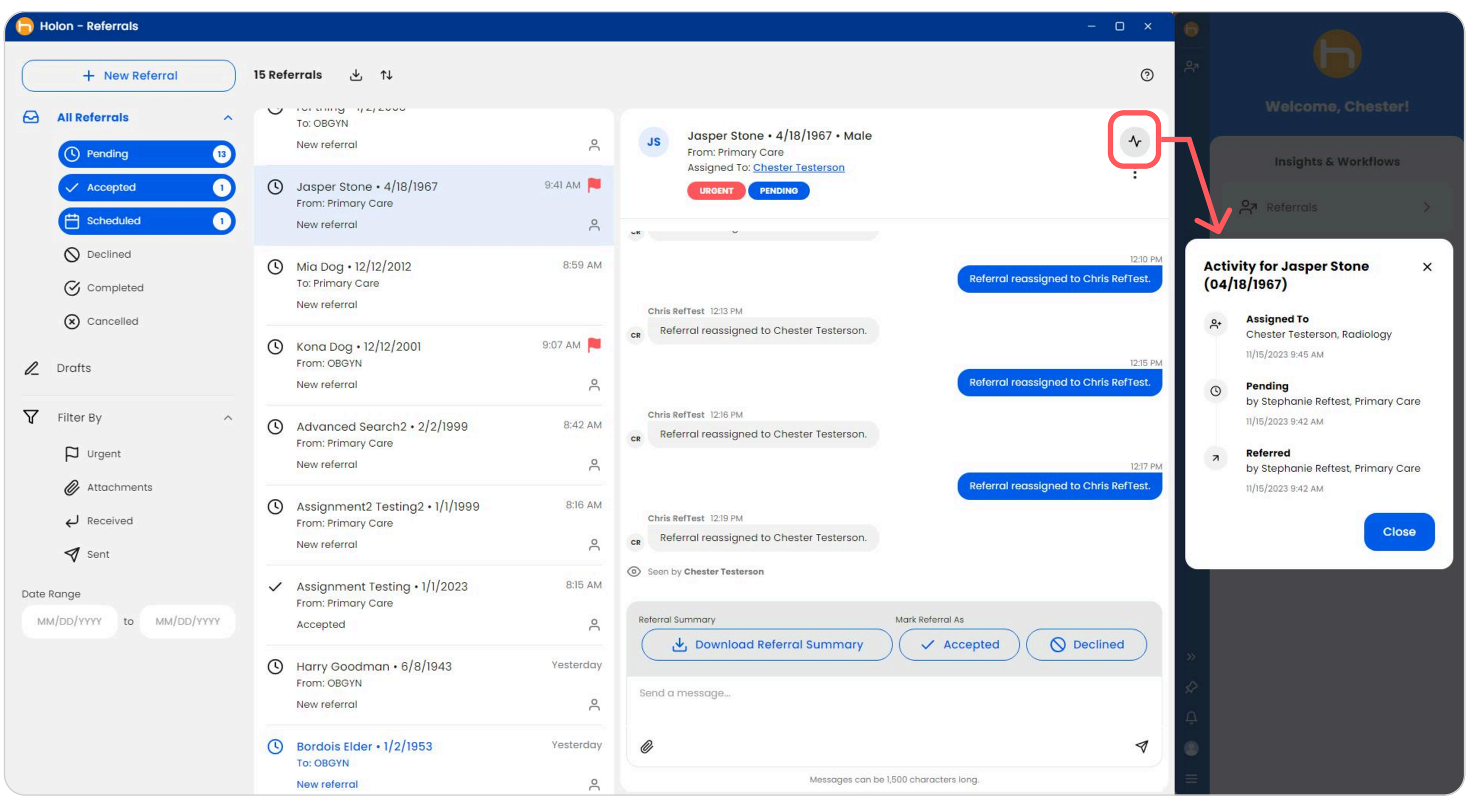
02 Referral Details

The referral's header contains important details, like:

- Patient's basic info (name, date of birth, & gender).
- From (who sent the referral).
- Assigned To (receiving user who has been assigned to the referral).
  - Note: Senders are unable to assign to a member of their organization at this time.
- Status (referral's current status & urgency).

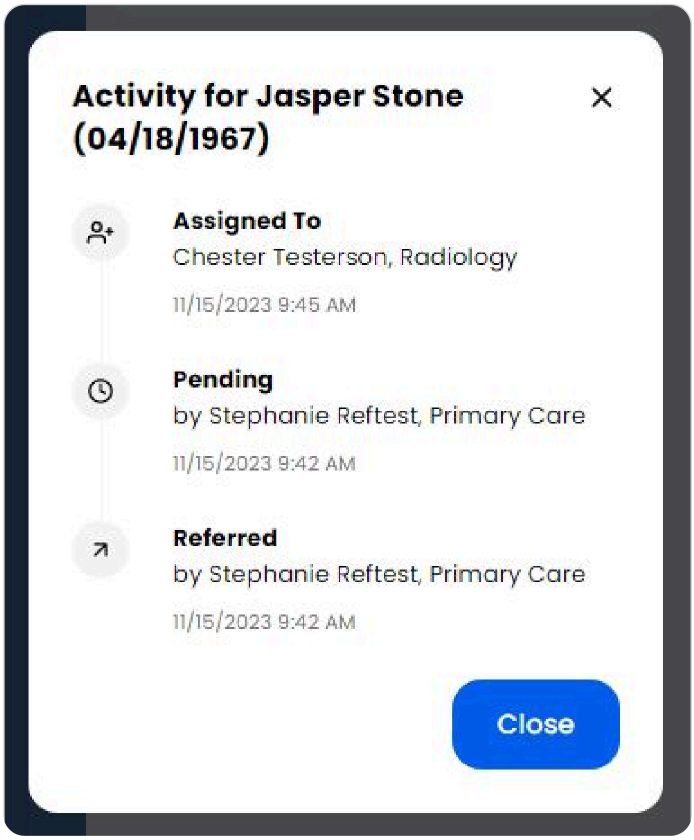
03 Activity Timeline

To open the Activity Timeline, click on the Activity icon located in the referral's header. The timeline will display on a modal in the ribbon side of the app.



03 Activity Timeline (continued)

The Activity Timeline displays a high-level overview of the referral's history, including edits to the referral's form, status changes, and assignments. The most recent activity is displayed at the top of the timeline.

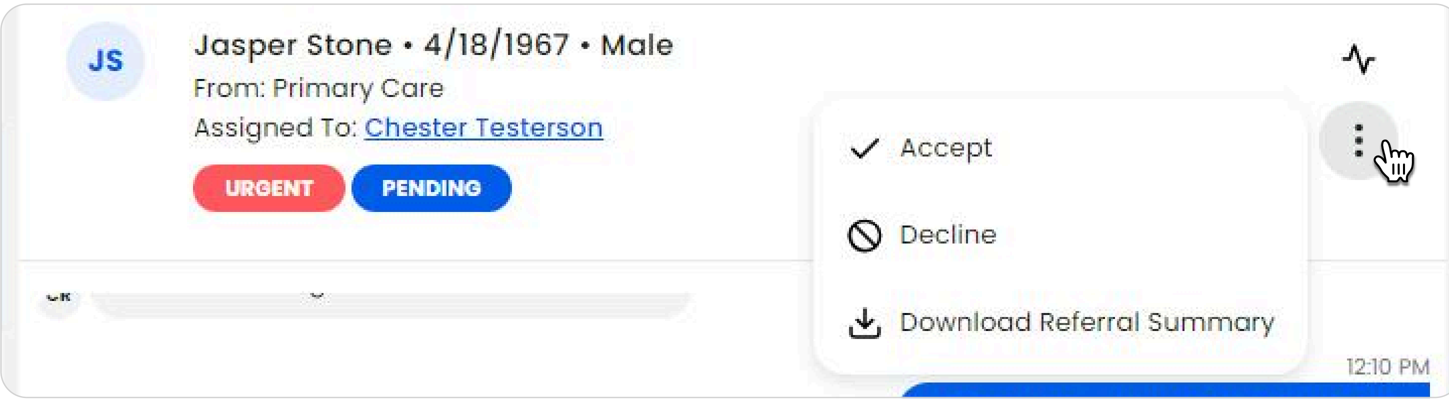


To close the Activity Timeline, click the Close button at the bottom of the timeline modal, or click the X at the top of the timeline modal.

04 Menu

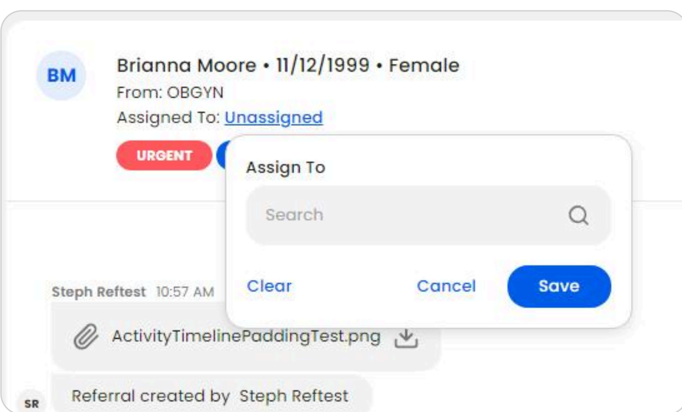
To open the Menu, click on the 3 vertical dots icon located in the referral's header. This will show the menu options, where you can:

- Take available referral status actions
- Download the referral summary

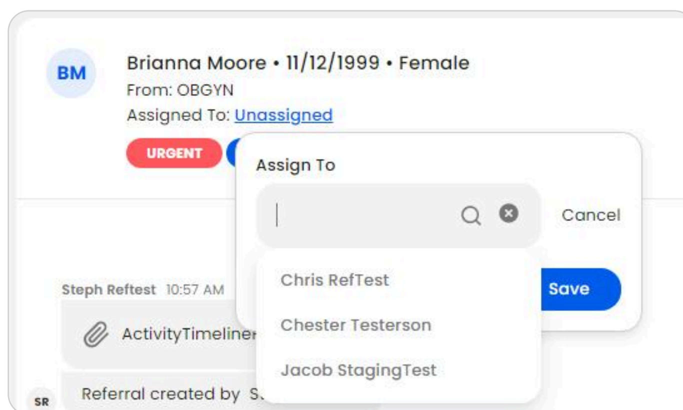


05 Assign a Referral (Receiving Organizations Only)

A To assign a referral to someone in your organization, click on the Unassigned link in the referral's header. This will open the Assign To modal.



B Type the name of the desired user, or click the search bar and select the desired user from the dropdown menu. Click Save.



05 Assign a Referral (continued)

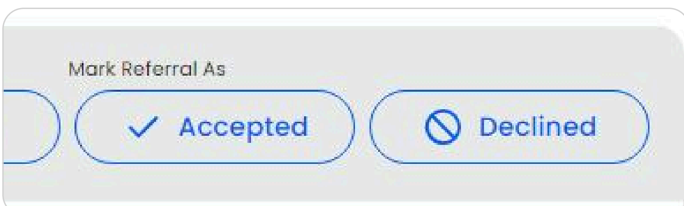
C To reassign a referral, click on the assigned user's name. The same Assign To modal will open, where you can select the new assignee. Click Save.

Please note only receiving organizations will be able to assign a referral.

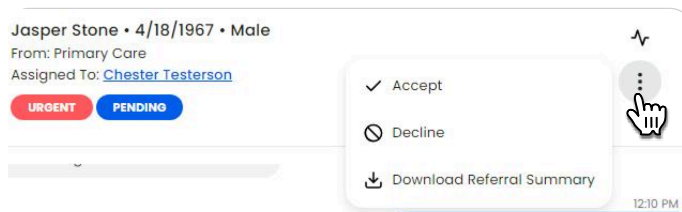
06 Update Referral Status

To update a referral's status, click on the desired referral from the Inbox. The referral window will then open up where you can update the status. There are two ways to update a referral's status:

A Under Mark Referral As, click the desired status.



B On the Referral Details header, click the Menu icon and the desired status.



Your options for referral status updates will depend on where the referral is at in its lifecycle. Please see the Referral Lifecycle Diagram on page 7 for a detailed explanation.

The referral will automatically change all status-related elements to reflect your update:

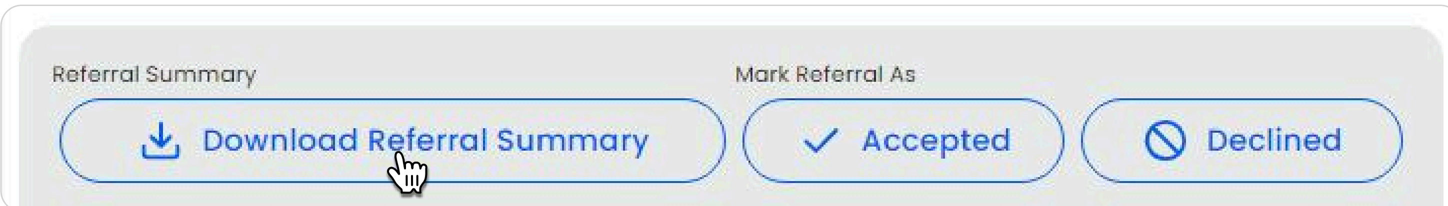
- In the Inbox, the icon will update.
- In the Referral Details header, the status label will update.
- In the referral window, the options for status updates will reflect the referral's new status.
- In the referral's chat, an auto message will be sent notifying all involved parties of the update.

Please note that a referral's status cannot be reverted once the update has been made.

07 Download a Referral Summary

The referral's summary file contains the current history and details of a referral at the time of download. The summary will be downloaded as a PDF.

To download a referral's summary file, click Download Referral Summary in the referral window. This will prompt a Save As popup where you can select the file's download destination, and rename the file, if desired.



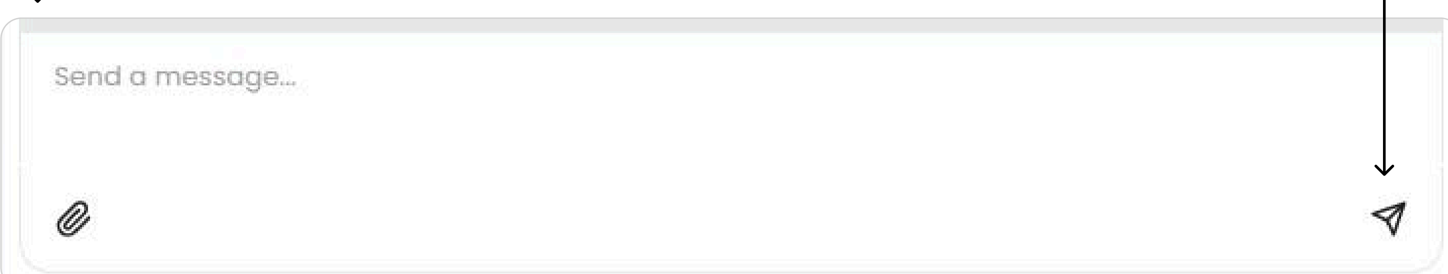
Please note that the referral summary file will contain PHI. You will need to adhere to all HIPAA security standards when handling these files.

08 Messaging

Messages up to 1,500 characters can be sent and received in the referral chat.

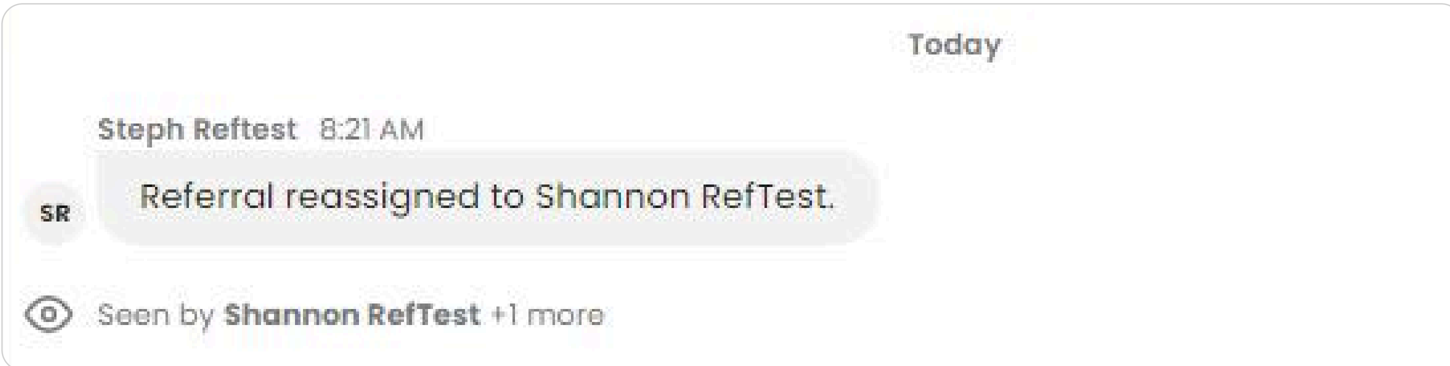
To send a message, click into the chat text area and type your message.

Click the Send icon to send your message into the referral chat, where all involved parties will be able to view your message instantly.



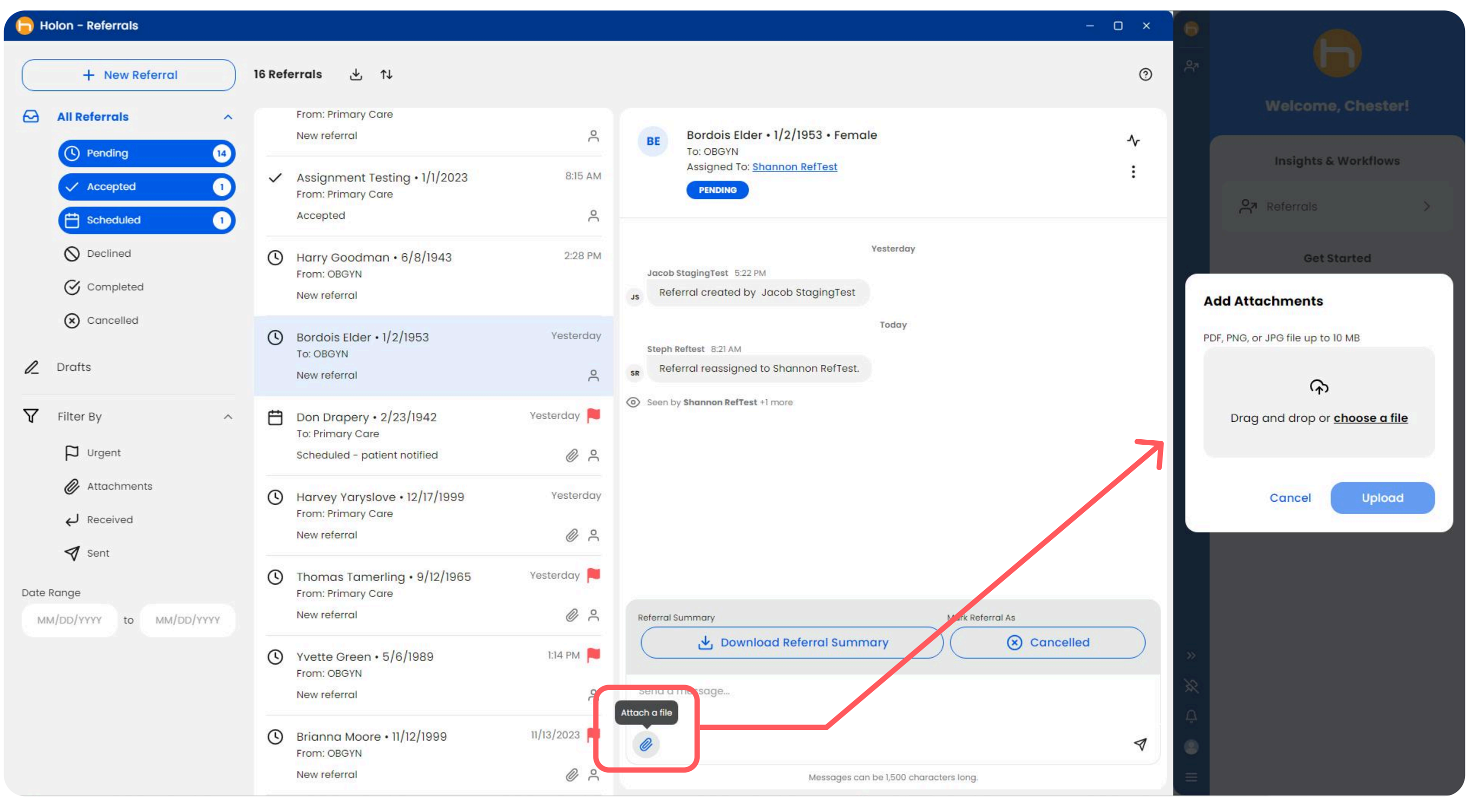
08 Messaging (continued)

Any time a user views a referral chat's messages, a read receipt will be displayed. Read receipts will show an eye icon and a message stating "Seen by (user name)."



09 Attachments

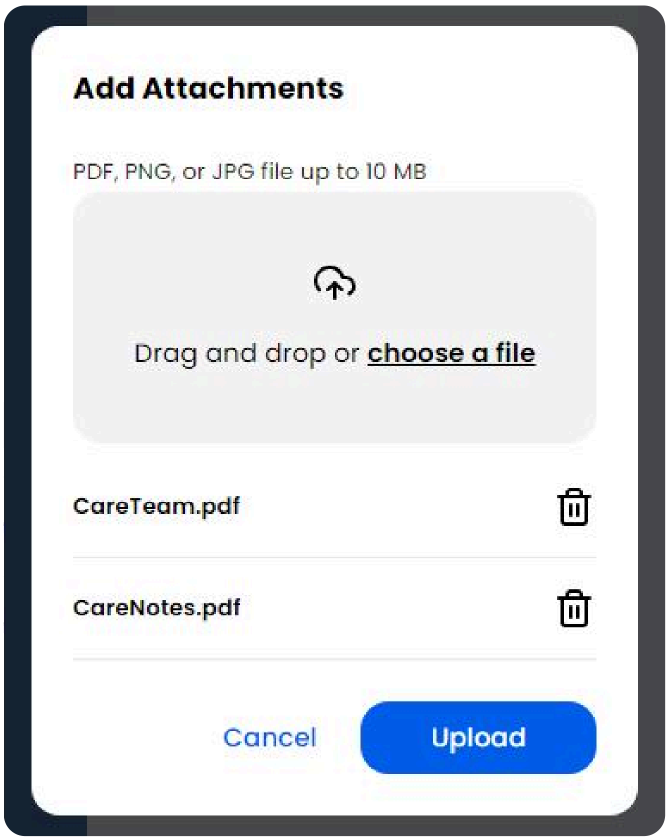
To send an attachment, click the Attachments icon (paperclip) in the referral window. This will open the Attachments Modal. PDF, PNG, or JPG files up to 10 MB are supported.



09 Attachments (continued)

You can add your attachment in two ways:

- Drag and drop your file into the Attachments Modal.
- Click the choose a file link in the Attachments Modal and select your file from the file explorer popup on your device.



You may add multiple files to the Attachments Modal.

To delete a file from the Attachments Modal, click the Delete icon (trash can).

Click the Upload button to send your attachment into the referral chat, or click the Cancel button to close the Attachments Modal without sending an attachment.

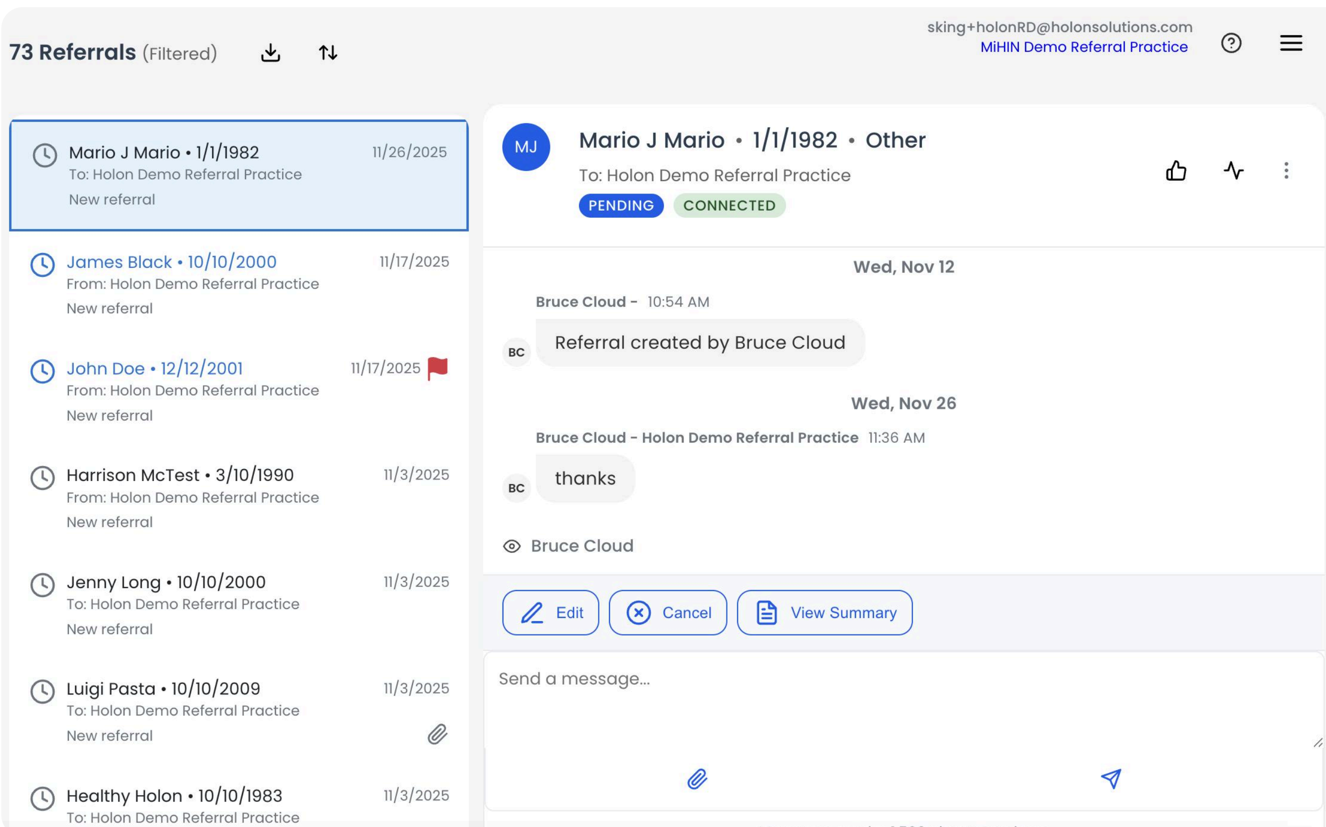
Once sent into the chat, all involved parties can click the attachment in the chat to download and view the files.

10 New Activity Indicator

The new activity indicator allows you to visually notice a referral has been updated by the other organization. New activity on a referral is indicated when the referral has turned blue and moves to the top of the referral inbox.

Here is a list of events that will update a referral with new activity:

- New referral is created/sent
- A chat/message is sent from the other organization
- A status has been updated from the other organization
- An update/edit on the referral form from the other organization



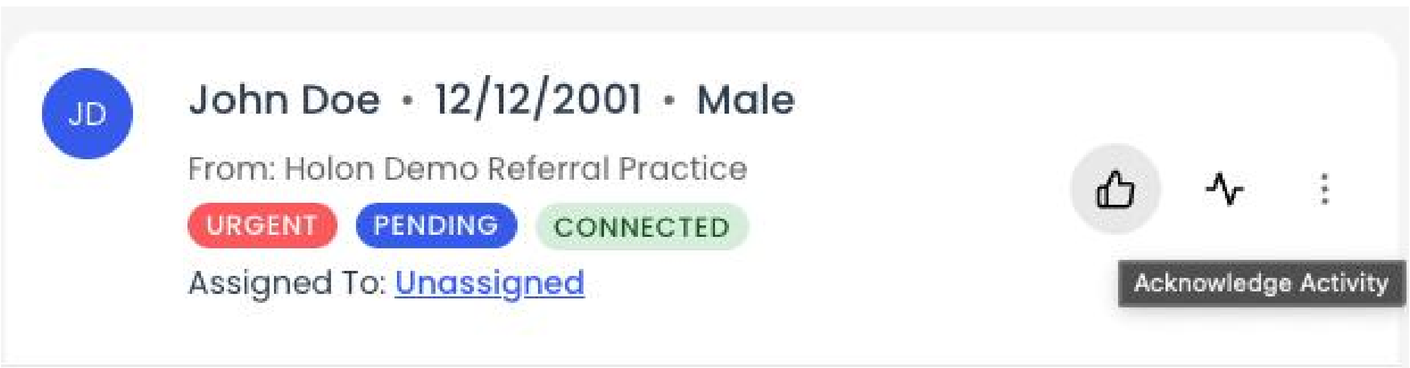
Note: If any changes were made from a user within your own organization, you will not get the New Activity indication in the Inbox.

Once you select the referral for review, the new activity indicator will disappear and the referral will go back to black.

11 Acknowledge a Referral

Acknowledging a referral allows large teams to manage which referrals need to be addressed. When a referral comes in with New Activity indication, an acknowledge (thumbs up) icon will display in the patient header section of the referral.

Users within the same organization can "acknowledge" the referral by clicking on the icon. This will remove the New Activity indictor for all other users in the same organization. This allows for large teams to easily focus only on the referrals that have not been addressed yet.



Note: The acknowledge action will show in the chat messaging window for all users.