Archived Referrals

Bridge Referral Application User Guide

Archived referrals are referrals that are in Declined, Cancelled or Completed status and are older than one year, OR are in the Declined, Cancelled or Completed status and are manually archived by the sending office.

Archived referrals are stored in a folder in the organization panel (far left) and appear when they meet search criteria. Clicking on Archived (1) and then click into the Search field (2).

Searching for Archived Referrals

Archived referrals will not display when the Archived option is initially selected. To display archived referrals the user must click in the Search box and either 1) select specific criteria and select Search or 2) leave all criteria blank and select Search to display all archived referrals.

Users can search for archived referrals by five different criteria. These options can be combined to further narrow the list of archived referrals.

1. First Name
2. Last Name
3. Sent To – Select an organization or leave blank to select all partner
4. Date From – The earliest date a referral was sent
5. Date To – The latest date a referral was sent
Archived Referrals

Search options:

First Name

Last Name

Sent To

-- All Partners --

Date From

mm/dd/yyyy

Date To

mm/dd/yyyy

Search

Date Range
To narrow the list of referrals by the sent or received date either enter a date in the Date From and/or Date To field.

Dates can be manually entered in the following format mm/dd/yyyy.

A popup calendar is also available. Use the arrows to change to a different month.
To display all months of the year click on the name of the month in view. Then select the desired month.

To display other years, use the arrows to scroll or click on the year in view.
**Archived Referrals**

**Clearing Criteria**
Any previously selected criteria will remain in view when the **Archived** option is selected again. Therefore, either change the selected criteria or click the in the box and select “delete” to remove the criteria.

**Archiving a Sent Referral**
Only SENT referrals in a Declined, Cancelled or Completed status can be archived. When a referral is archived, it is archived on both the sending and receiving office.

To archive a referral, click on the desired referral in the worklist and then click the **Actions** button and select **Archive Referral**. The referral will be immediately archived.