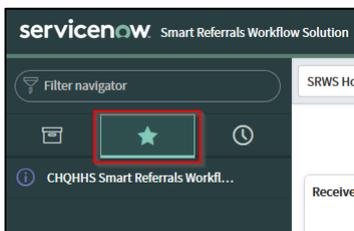




# Smart Referrals Workflow Solution

## Creating a Favourite List

Users can edit any list view of referrals from a specific queue and save that view as a favourite. Favourites can be accessed from the star icon on the navigation panel.



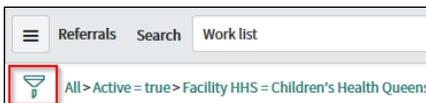
To set a favourite, the user must first create a filtered view of a list of referrals and then save it as a favourite.

### Setting a filtered view:

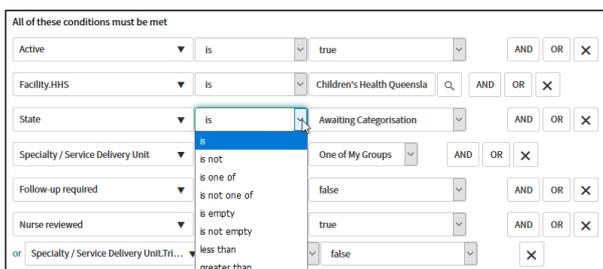
**Recommendation:** When beginning to set a view to view referrals, select a queue that is most similar to the view you are trying to achieve.

(e.g. If trying to set up a filter of referrals that are awaiting categorisation for a specific specialty, users should begin from the *Awaiting Categorisation* queue.)

1. Select the funnel icon (top of a list of records)



2. Set the conditions required to display the desired records



**Note:** If creating a filter to identify records for a specific specialty, users should select the specialty by clicking on the magnifying glass icon. A pop-up window will display. Search for the specific specialty to ensure the specialty selected is in with the correct facility.

3. Click Run to display the filter in a list view.



A list of results will display. When the desired criteria is visible, this view can be saved as a favourite.

OR

A filter can be set by narrowing an existing list of displayed records.

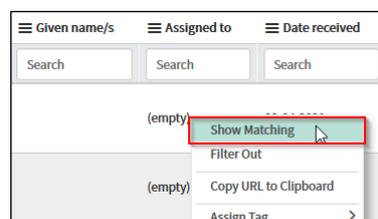
4. Select relevant queue from left menu
5. Enter text in the free text field under each column heading.



**Note:** If search boxes are not visible, select the magnifying glass icon. Search fields below each column will display. *This type of search may not be available on all queues.*

OR

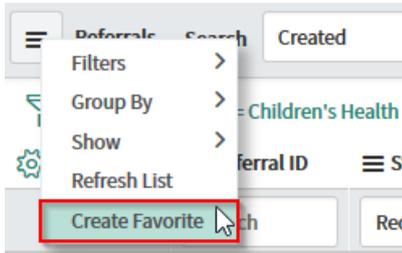
By right clicking on any value and selecting Show matching to show all record that match that value or Filter out to remove all records that match that value. (see screenshot below) Once the list of records displays the required result it can be saved.



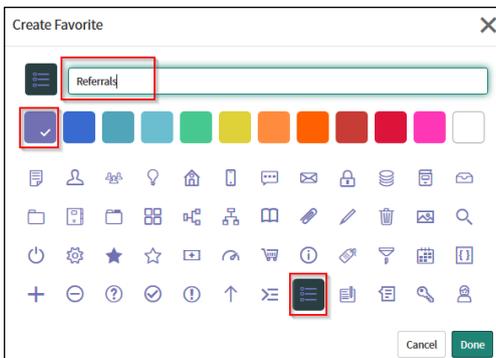
## Saving a list view as a favourite

After creating a list view of referrals that have been filtered as desired, this view can be saved as a favourite.

1. Click on the 3 horizontal line icon at the top left of the list view and select **Create Favourite**.



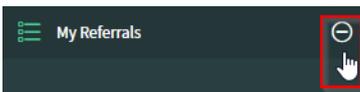
2. Set the title, choose a menu colour and icon, then select **Done** in the pop-up window.



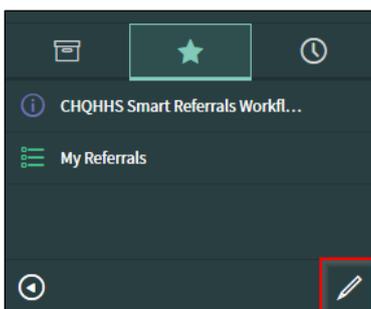
## Editing or deleting a favourite

Once set, the favourites filter cannot be modified.

However, the favourite can be deleted by hovering over the menu and selecting the minus symbol



Alternatively, the title and colours can be changed by selecting the pencil icon at the bottom of the favourite panel.



## How to get help

For support contact the Health Informatics team by email at [CHQ\\_DigitalFuture@health.qld.gov.au](mailto:CHQ_DigitalFuture@health.qld.gov.au) or by calling 3068 1999 (select option 1).

Application and technical support can also be accessed through the IT Support Centre 1800 198 175