General
• The ability for a user to manage referrals within the Mapworks platform.

Navigation
• Make sure that the user is properly logged into the Skyfactor Mapworks platform.

Search for a student by any available method (Search, Dashboard, etc.)
Select the student and the Student Profile page will load
The user can select to make a referral, book an appointment, or log a contact directly from this profile page.
Make a Referral

- User selects the “Make a Referral” button

This will bring up the activity window

- User enters the relevant details regarding the referral and selects a sharing option
  - Private – Only the user who created the referral can view the details
  - Public – Allows any faculty/staff member with the appropriate permissions to view the referral for the selected student
  - Team – User can select one or multiple teams whom can view the referral. (NOTE only members within a team that have permissions to view the student will be allowed to view the referral details)
Once the user has completed the details and clicks the “Create a Referral” button, the referral is saved and a confirmation message will appear.

The user is returned to the student profile from which the referral was made.

The staff member who was assigned will receive multiple notifications regarding the new referral assigned to them.

- On the student profile page and the dashboard view
• In their alerts on the top right of the window (bell icon)

Student Specific Referrals

To view all referrals for a particular student the user can click on the total number of referrals listed for that specific student.
• Clicking this will list all referrals for this student at the bottom of the page

Log Notes for a Student/Referral

To log a note regarding a referral assigned to the user, there are two options for users. They may choose to directly enter a note from the student profile page by selecting “Log Note” under the referral
This will take the user to the activity screen under the notes tab.

- Once the user has completed the details and clicks the “Create a Note” button, the note is saved and a confirmation message will appear.
- The user is returned to the student profile from which the referral was made.
- The note is logged in the activity stream for that student.
Alternative method for adding notes:

While viewing the activity stream for a student the user can enter an activity including notes by selecting the “Add New Activity” button.

- User clicks the “Add New Activity” button
- The activity window opens
- The user selects the type of activity from the tabs on the left side of the window
- User completes details and saves progress
- Upon saving a confirmation message will be displayed and the user will be returned to the student profile from which they initiated the activity
Closing a Referral

This section explains how to close an assigned referral.

1. User selects the appropriate referral from either the Student Profile page or from the Dashboard.
The activity window will open to the Referral tab with the details populated.

The user can choose to close the referral immediately or edit the referral and then close.

- To edit the referral click the “Edit Referral” button on the top of the window
  - This will reopen the referral activity and allow the editing of content
- To close the referral, click the “Mark referral as closed”
  - Once closed a confirmation message will be displayed.
If the user needs to reopen a referral, they can click on the referral in the activity stream.

- The closed referral will open in the activity window, and the user can click on the “Reopen referral” button on the bottom of the window.
- After clicking, a confirmation message will be displayed and all assignees of the referrals will see it assigned to them in their dashboard and on student profiles.