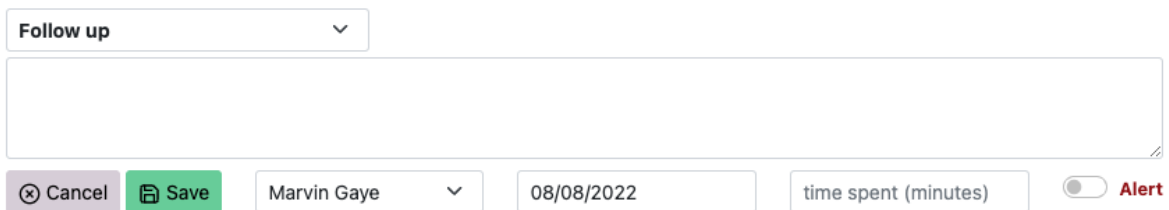


Setting reminders and assigning to a staff member

[Training videos - Landing page](#)

Set a reminder

A reminder can be set on a referral when entering/editing a Follow Up or Clinical Review note. To set a reminder, enter a Due Date in the field (to the left of the Time Spent field).



The screenshot shows a form with a dropdown menu set to "Follow up". Below it is a large empty text area. At the bottom, there are several fields: a "Cancel" button, a "Save" button, a dropdown menu set to "Marvin Gaye", a date field set to "08/08/2022", a "time spent (minutes)" field, and an "Alert" toggle switch.

Note reminder fields

When the Due Date has been reached, the referral will appear on the main screen in the **To Be Actioned** list.



The screenshot shows a navigation bar with three items: "Incomplete referrals" with a red badge containing the number "15", "Incomplete contacts" with a red badge containing the number "5", and "To be actioned" with a red badge containing the number "5". The "To be actioned" item is circled in red.

To Be Actioned list

Assign a referral to a staff member

When a Due Date is entered, you also have the option of setting who the referral is assigned to. The screenshot above shows that the note (and therefore the referral) has been assigned to Marvin Gaye.

🕒 January 26, 2026 14:39:13