

Overview

The **Tag** functionality enables customised tagging or categorisation of referrals. They can be applied at any time after the referral is created.

Tags can be used to identify incidents, such as "Bushfire", "Floods", or be used as a quick reference comment or category, e.g. "Waiting for documents".

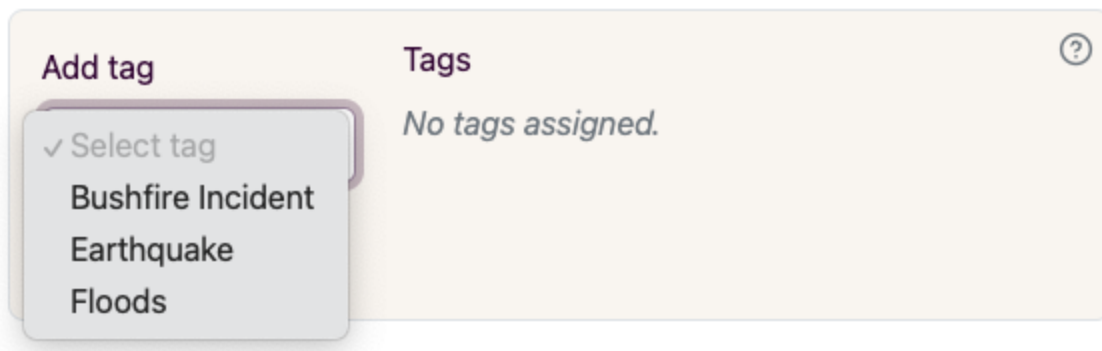
Depending on the situation, tags can be applied as an indicator to the team that an action is required, or to show what the record relates to so it can be actioned accordingly.

Applied tags will display prominently in the lists on the main page.

The function includes the option to generate an email notification when the tag is applied.

Process

On the referral screen, the **Manage tags** button will appear at the top right of the screen if tags have been set up. Click this button to display the dropdown for adding a tag.



Selecting a tag

The tag behaves the same as most other fields on the screen, in that the referral will need to be saved in order to apply the tag.

Once saved, another tag can be added.

Applied tags will display in the lists on the main screen.

If the tag is configured for email notifications, an email will be sent. An example is shown below.

Tags filter

On the landing page, the Tags filter is accessible from the header for the Tags column.

Incomplete referrals **29** Incomplete contacts **21** **0** To be actioned **4**

Show assigned referrals ?

⋮	Tags	Referral date	Name	IAR-DST level	Follow up note	Assigned to
	Earthquake	15/07/2024	████████	3+		

Tags filter

The list will filter according to the setting on the Tag filter screen.

Tag History

In the section of the screen where Tags are applied there is a “Tag history” button for displaying a history of tags applied and removed.

Add tag Tags

Select tag Earthquake

⌚ Tag history

Tag	Assigned by	Assigned on	Unassigned by	Unassigned on
Earthquake	████████	15/07/2024	████████	15/07/2024
Floods	████████	15/07/2024	████████	15/07/2024
Earthquake	████████	15/07/2024	████████	16/07/2024
Bushfire Incident	████████	16/07/2024	████████	16/07/2024
Earthquake	████████	16/07/2024	--	--

Tags history

Setting up Tags

To set up a tag contact Medicare Mental Health Support at pmhcis.support@nwmphn.org.au.

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