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# USER BULLETIN: Cancelling a Referral
## 3-Sept-13

This User Bulletin will explain how to cancel a referral.

**Step 1: Checking your Outstanding Referrals Report**

**If you created a referral by accident, you need to delete the referral**

To access the referral, you will need to log into ServicePoint. Then go to the "Reports" tab as indicated by the red arrow in Figure 1-1.

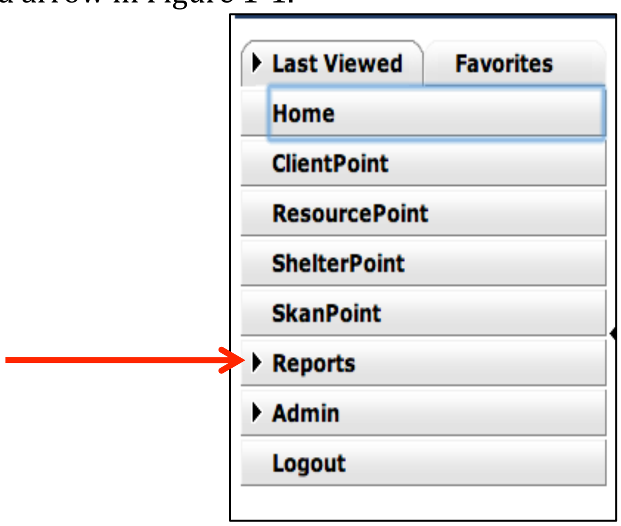


**Figure 1-1**

On the "Provider Reports" page, you will see a button that says "Outstanding Referrals," as shown in Figure 1-2. You will need to click this button.

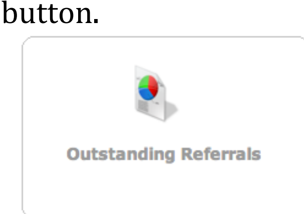


**Figure 1-2**

You will then be taken to the "Report Options" page. Please select the appropriate report options. For "Referral Type," please select "Referrals my provider has made."

You can select a specific date range by inputting the date, or if you would like to view all referrals, leave the date boxes blank.

When you have finished filling out this form, please click "Build Report."

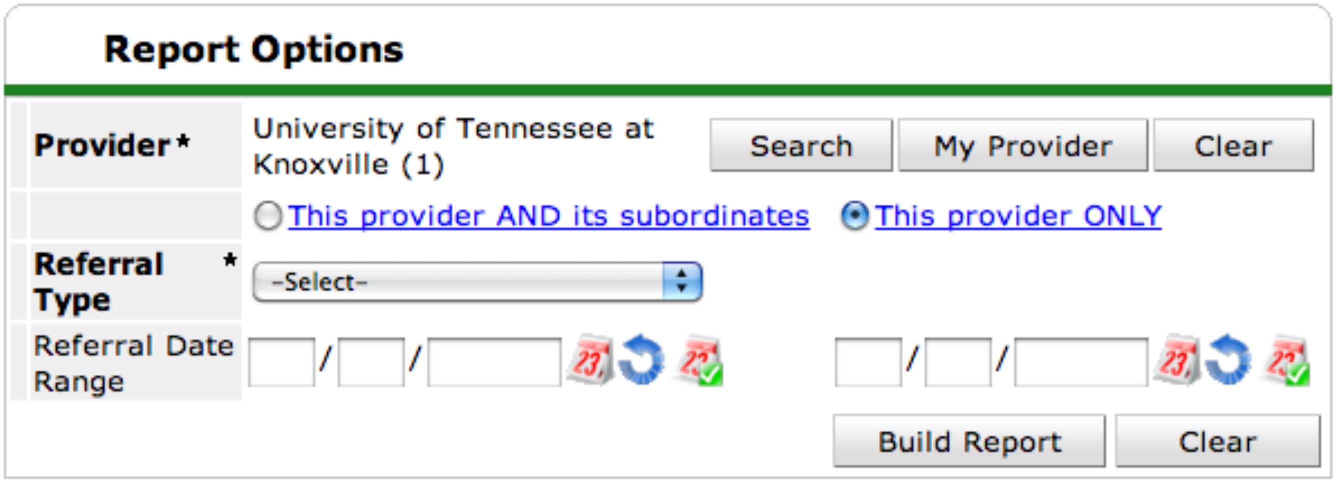


**Figure 1-3**

You will then see the following Outstanding Referrals page. For this example, you will be cancelling the first referral, the one made for Lisa McTest as indicated by the red arrow in Figure 1-4. Please click on the name of the client whose referral you would like to cancel.

Outstanding Referrals

| Name | Group ID | Referral Date | Need Type | Referred By | Referred To |
|---|---|---|---|---|---|
| (30104) McTest, Lisa | 1842110 | 08/28/2013 | Orienteering | University of Tennessee at Knoxville | Test Provider |
| (24092) McTest, Testy | 1842110 | 08/28/2013 | Orienteering | University of Tennessee at Knoxville | Test Provider |

**Figure 1-4**

You will then be taken to the “Client Profile” Page. Please click “Service Transactions” tab, as indicated by the red arrow in Figure 1-5.

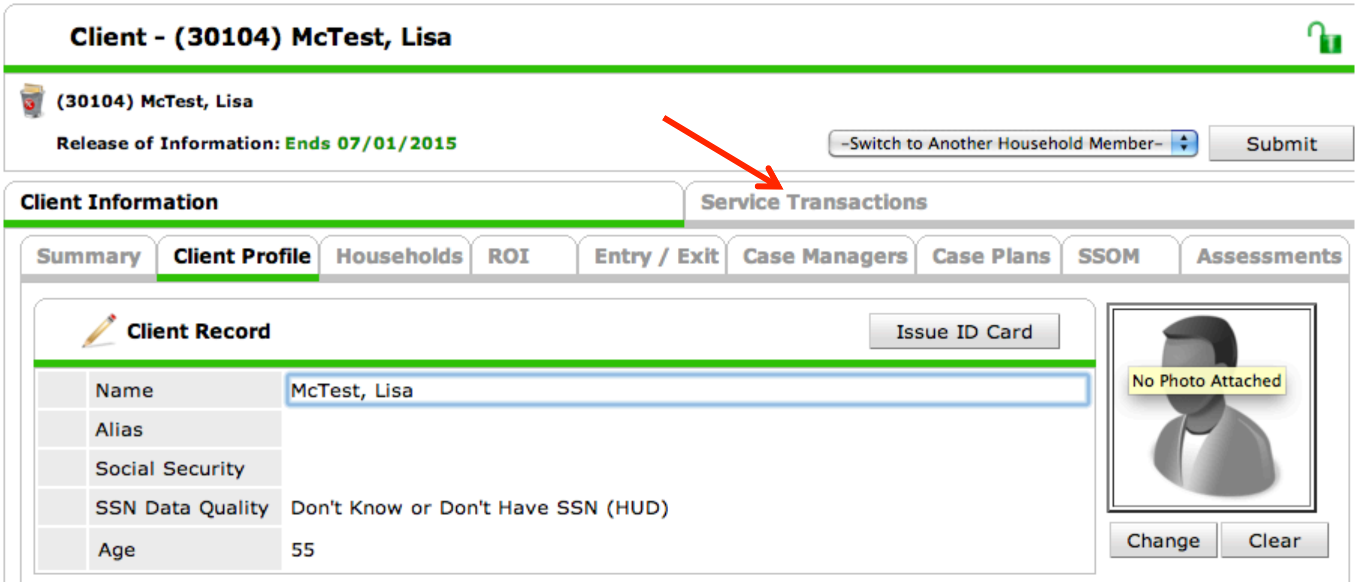


**Figure 1-5**

From the following screen, please click “View Previous Service Transactions” as indicated by the red arrow in Figure 1-6.

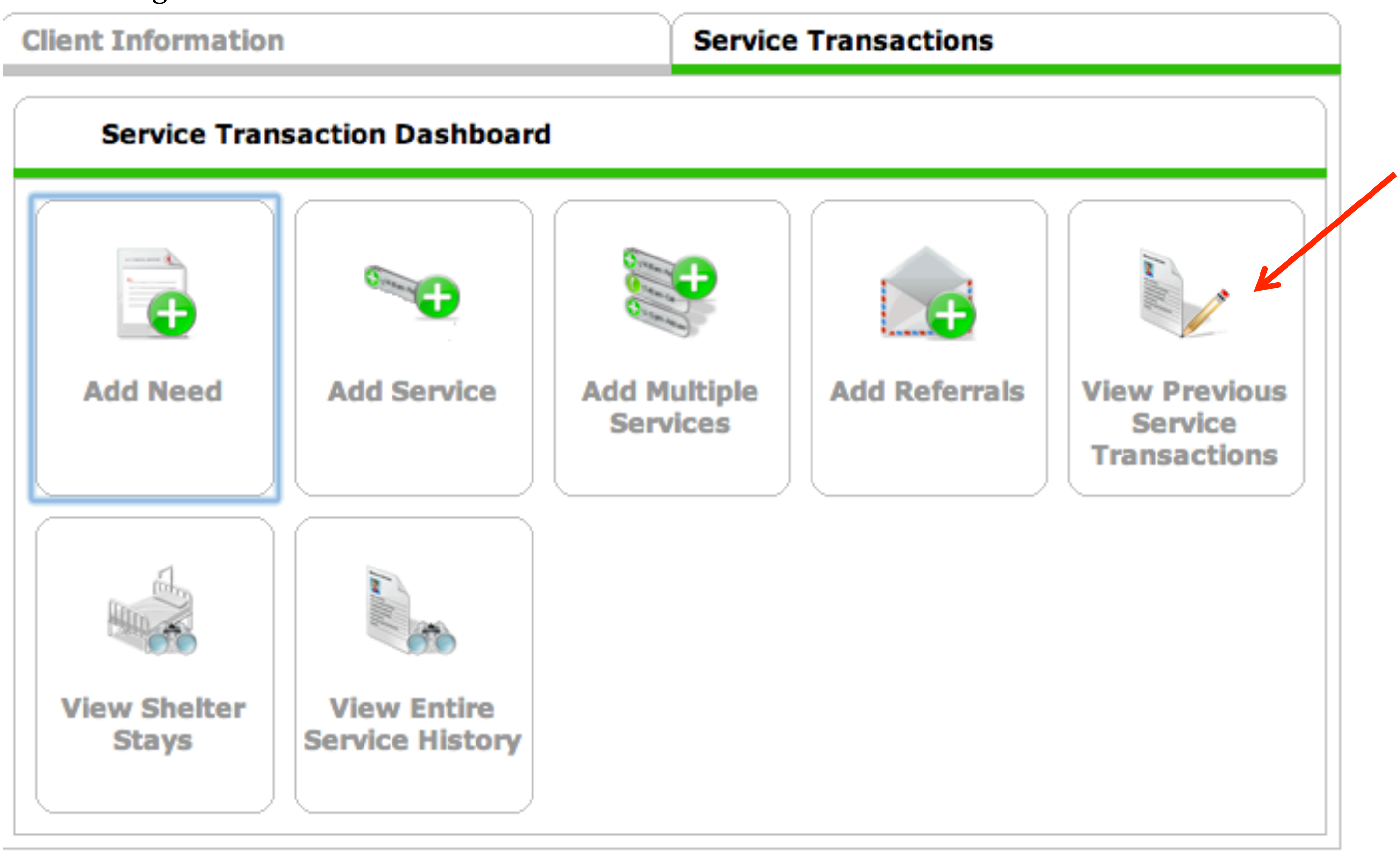


**Figure 1-6**

From this screen, please click the “Referrals” tab as indicated by the red arrow in Figure 1-7.

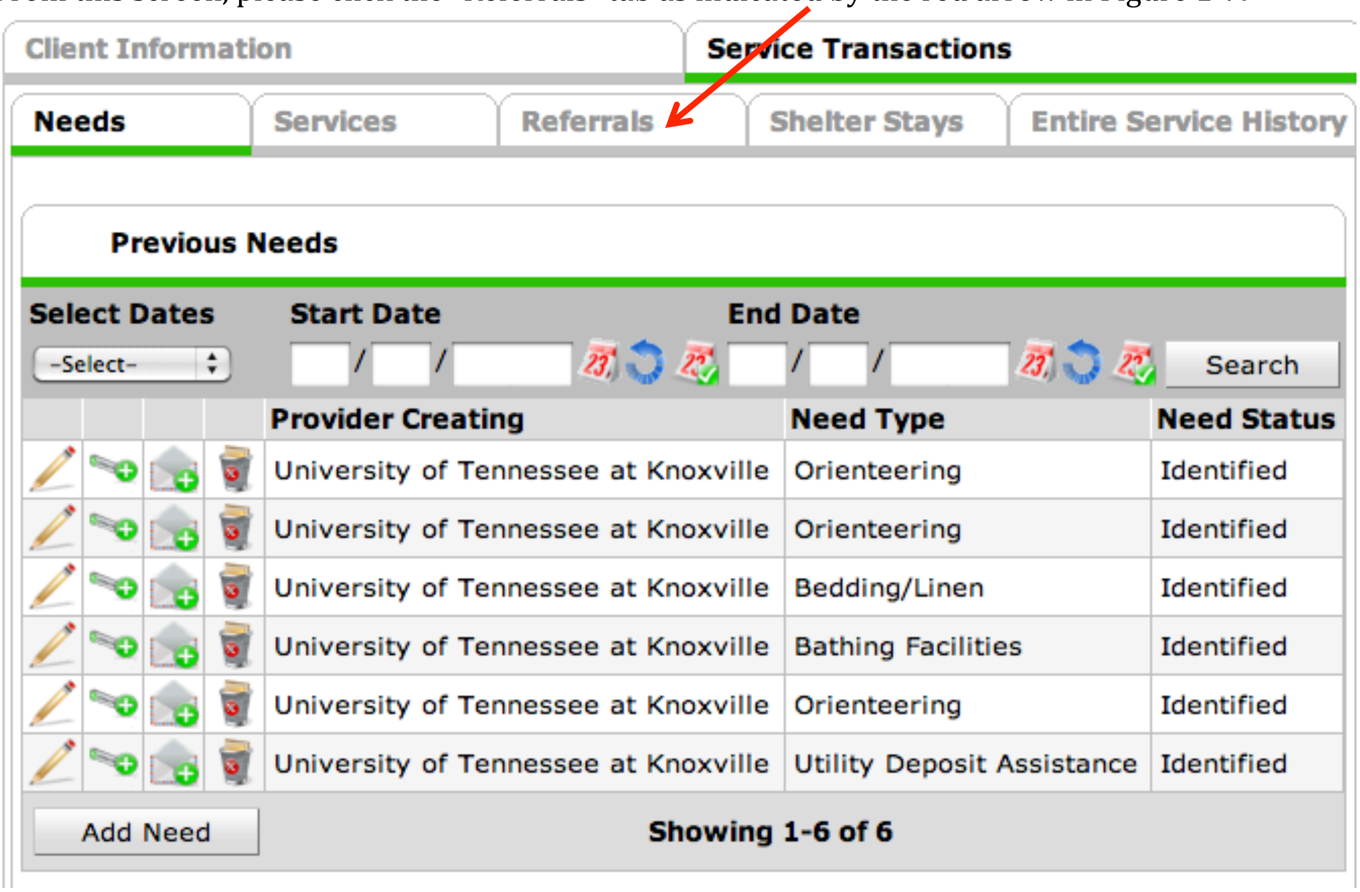


**Figure 1-7**

This screen will show us all “Previous Referrals” for a client. You want to delete the referral at the top, so you will click the trash can next to this referral as indicated by the red arrow in Figure 1-8.

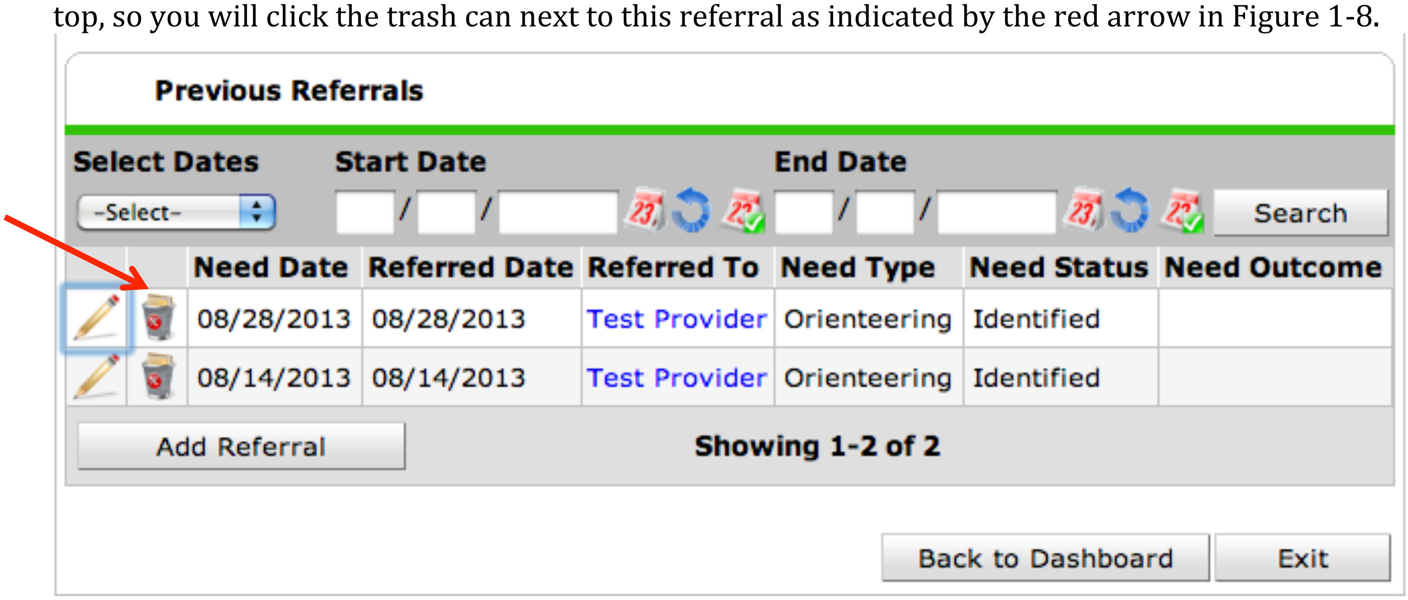


**Figure 1-8**

You will then get the following pop-up as shown in Figure 1-9. Select “Delete.”

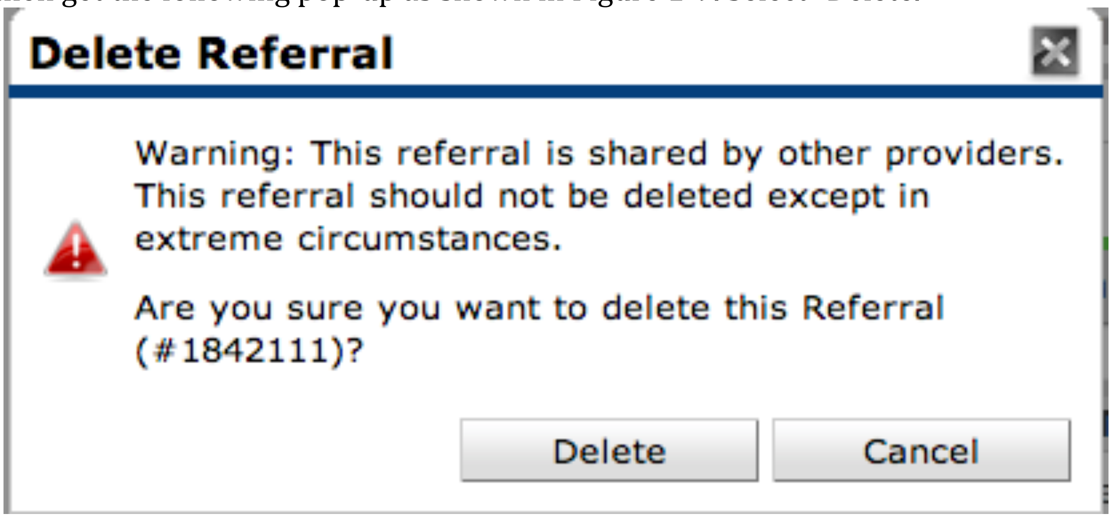


**Figure 1-9**

*Congratulations! You are now finished cancelling a referral!*