



Smart Referrals

Accessing Smart Referrals from Medical Director

1. Open Medical Director and select a patient.
2. In the Medical Director sidebar click the Smart Referrals button in the Smart Referrals widget (Figure 1).
3. Smart Referrals will open in a new window.


If the widget is not visible the sidebar is collapsed. Click the Smart Referrals icon  to expand the sidebar then launch Smart Referrals using the widget.



Figure 1: Smart Referrals widget in Medical Director

Certificates

Certificates are used to authenticate that a user belongs to their practice. Smart Referrals will prompt for a certificate when opened.

Your practice may have multiple certificates installed, for Smart Referrals select the certificate that begins with **general.800...**, (Figure 2) and click **OK**.

If you are not prompted for a certificate, only one is installed on your machine. This has been selected by default and Smart Referrals is ready to use.

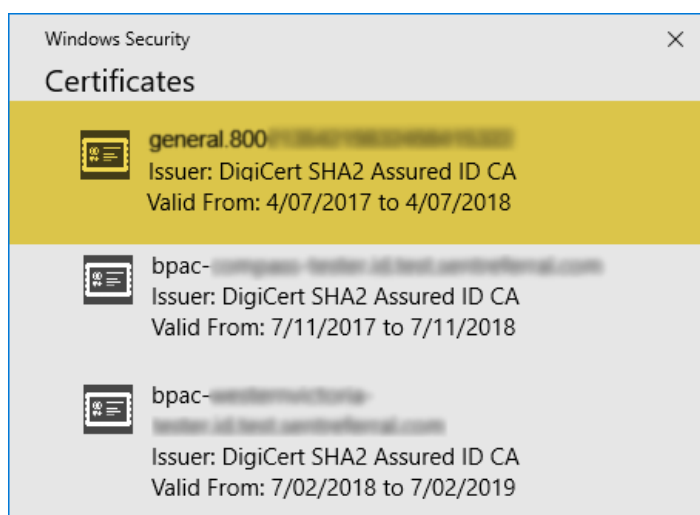



Figure 2: Smart Referrals certificate prompt

 For any certificate issues, contact your practice manager or local practice IT support.