REFERRALS

FAQs

Version 01
November 2024

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Administrator Questions

01 Why did MiHIN upgrade to the new referrals platform?

This upgrade is crucial for improving security and protecting patient data across Michigan. The old platform had outdated infrastructure, which put your data at risk. This new platform is more secure, reliable, and scalable. The MiHIN & Holon teams are committed to continual improvement of the new system, including restoring the most requested features from the old system to improve your experience. Thank you for your patience as we work through the transition to the new **MiHIN Referrals by Holon** tool.

02 How do I get my team set up with the new MiHIN Referrals platform?

A As of September 6, 2024, those who were users of the old referrals platform will need to upgrade in order to manage referrals through Holon. You can access step-by-step upgrade instructions, guides, recorded webinars, and support session booking on MiHIN's website: **https://mihin.org/mihinreferrals/**

B Prior to being provisioned into the MiHIN Referrals app, organization administrators will need to complete a practice planner, which can be downloaded here: **Holon Practice Planner: MiHIN Referrals.** Completed planners need to be sent to **support@holonsolutions.com**.

C Once your organization's practice planner has been received and processed, the Holon team will connect with you to provide MiHIN Referrals account information and access instructions.

D Organization administrators will need to contact **support@holonsolutions.com** for any user account updates (adding a new user, deactivating a user, adding an existing user to a new organization, etc.).

E The Holon Support team needs the following user information for any user-related requests:
1. First & last name
2. Email address
3. NPI (if provider)
4. List of organizations user needs access to

> 💡 **Organizations need at least 1 provider user in order to be referable in the MiHIN Referrals app.** If your organization does not want to include any providers, a team account can be created to satisfy this requirement. Please contact **support@holonsolutions.com** to assist with this new requirement.

03 What devices are compatible with the new Holon platform?

A Holon's new platform is compatible with the following devices:
1. Windows devices running Windows 10 OS or newer

B At this time, Holon's new platform is not compatible with the following devices:
1. Mac devices
    a. Support for Mac devices is on the Holon roadmap!
2. Tablets / mobile devices / Chromebooks
3. Devices running anything below Windows 10 OS

04 How do I get my referrals data from the old platform exported?

Prior to the upgrade, all users were instructed to export their own referrals data from the old platform. As of September 6, 2024, the old referrals platform is no longer accessible. If your team did not export your referrals data from the old platform, you will no longer be able to do so. Please contact **support@holonsolutions.com** for assistance.
1. Those health systems with data loads that were too large to manually export can expect a larger export to be made available upon request, please anticipate a longer turnaround time for export requests. For export inquiries, please contact Holon support.

05 As a receiving practice, how do I make changes to our questionnaire form?

> 💡 The new MiHIN Referrals app does not currently support admin access to manage questionnaires.

Organization administrators can contact **support@holonsolutions.com** to make changes to their questionnaires. Please include the following information with this request:
1. Organization name
2. Changes required for the questionnaire

06 The old referrals platform included a reporting tool. How do I gain access to the new reporting tool?

The new Holon platform provides a robust analytics dashboard where organization administrators can access usage reports on the MiHIN Referrals app. Please contact **support@holonsolutions.com** to assist with access to the MiHIN Referrals analytics dashboard.

Getting Started Questions

07   How do I access my new MiHIN referrals platform?

💡 Access step-by-step upgrade instructions, guides, & more here: **MiHIN Referrals - MiHIN**

A   Once your organization's practice planner has been received and processed, the Holon team will connect with you to provide your team's MiHIN Referrals account credentials (User ID and temporary password will be provided for each team member included on the practice planner).

B   Uninstall the old referrals platform from your device.

C   Install the new Holon platform on your device. Find installation instructions here: **Holon Installation Guide**

D   Log in using the account credentials provided to you by the Holon team.
   1. Please note that the new platform utilizes email addresses as user IDs. Account credentials from the old platform will not transfer to the new platform.
   2. If the credentials given to you are not working, please contact **support@holonsolutions.com** for assistance.

E   Start using your new MiHIN Referrals app! Step-by-step MiHIN Referrals guide: **Referrals User Guide**

08   What should I do if my organization submitted a practice planner, but I still do not have my account credentials?

A   If you have not yet received your account credentials for the MiHIN referrals app, your organization administrator can contact **support@holonsolutions.com** and request an update on the provisioning process.
   1. Please note that you will not be able to access the new MiHIN Referrals app until the following items have been completed:
      a. A practice planner has been submitted for your organization
      b. The old referrals platform has been uninstalled from your devices
      c. The new Holon platform has been installed on your devices

B   The Holon Support team needs the following user information for any user-related requests:
   1. First & last name
   2. Email address
   3. NPI (if provider)
   4. List of organizations user needs access to

09 I do not see any of my migrated referrals from the old platform in the new MiHIN Referrals app. What should I do?

A All organizations who had any active referrals usage within the last 2 years (August 2022-August 2024) have had their active referrals data automatically migrated onto the new platform. Your organization's team should be able to see and manage these referrals in the MiHIN Referrals app.

B Please contact **support@holonsolutions.com** for assistance if you are not able to see your migrated referrals in the new MiHIN Referrals app.

Referrals Workflow Questions

10 What is the referrals lifecycle?
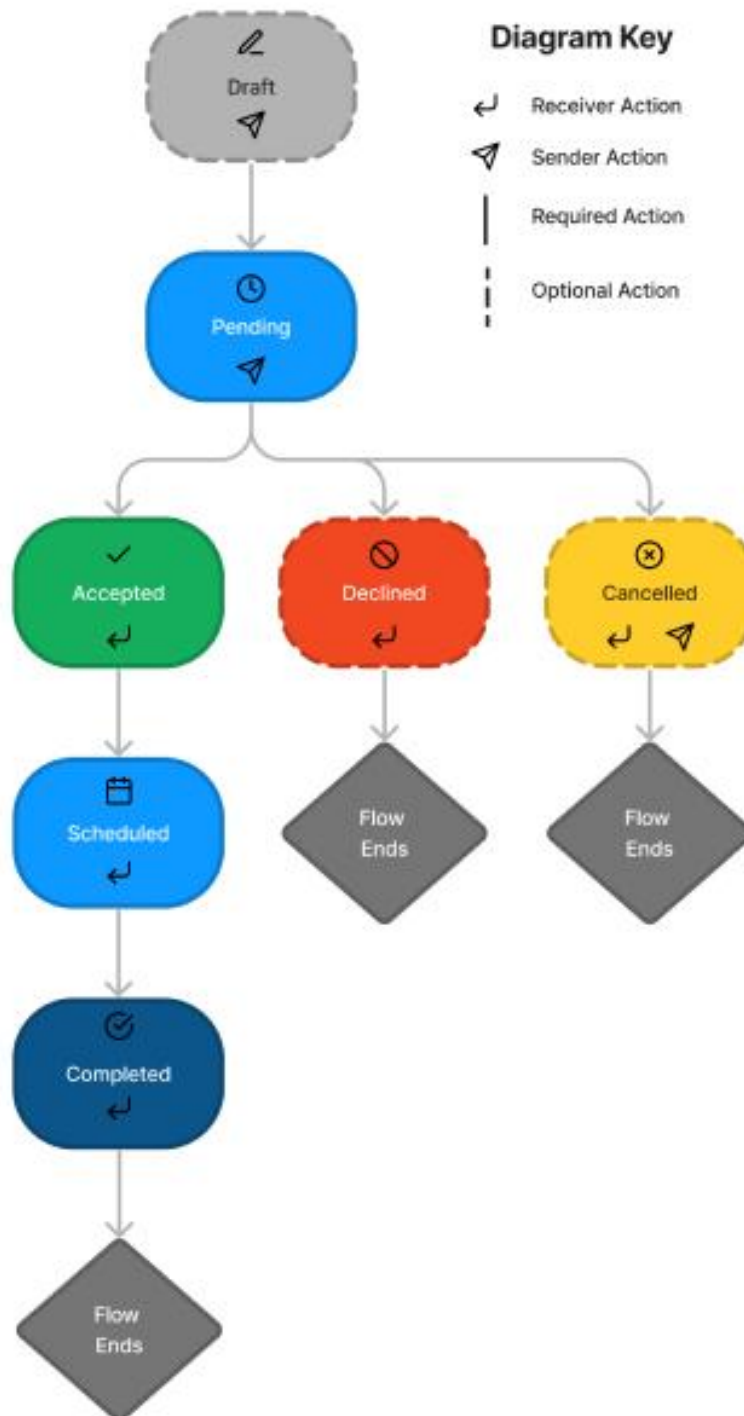
11 I manage referrals for multiple organizations, but only see one organization's referrals in my inbox. How can I switch organizations?

💡 The MiHIN Referrals inbox displays referrals for one org at a time. Step-by-step instructions on switching organizations can be found here: **Switch Organizations Guide**

A For those that are added to multiple organizations, utilize the Org Switcher feature in the Holon app to switch into the desired organization. You can find the Org Switcher in the following ways:
   1. Home page header
   2. Profile & Settings page

B If you have not been added to an organization that you should have access to, please have your organization administrator contact **support@holonsolutions.com** for assistance.

## 12 How do I know when there are messages waiting for me on a referral?

💡 The new MiHIN Referrals app does not yet support in-app / email notifications when updates or messages have been received in a referral. These features are on the Holon roadmap!

A When a new referral is sent, it will display in bold blue text at the top of your inbox (depending on the inbox filters you have applied).
   1. Please note that once opened, the referral will no longer display in bold blue text.

B For any other updates to a referral, please locate and open the referral.

C The inbox offers a variety of filters and sorting options that can be utilized to refine which referrals are displayed.
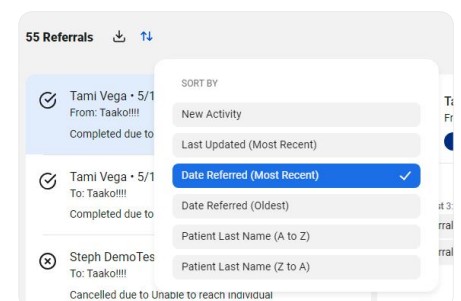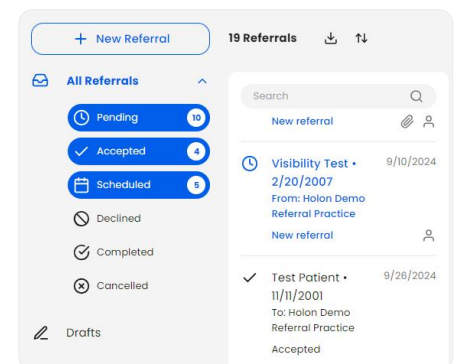
13 I just sent a new referral, but I cannot find it in my inbox. How do I find my missing referral?

💡 Please do not add any attachments to a referral form. Instead, send your attachments in the referral's chat after it has been sent.

A Once you have successfully sent a new referral, it will automatically display in your inbox with the Pending status in bold blue text, at the top (depending on sorts / filters currently applied). If you cannot find your newly sent referral, please try the following steps:

1. If you have inbox filters applied, make sure the Pending status filter is applied (applied filters display with blue highlighting)
2. Try deselecting all applied filters
3. Make sure your inbox sort is set to one of the following options:
   a. New Activity
   b. Last Updated
   c. Date Referred (Most Recent)
4. Make sure your Date Range filter is either empty, or set to an appropriate date per the referral you're searching for
5. Try using the quick search feature to search for the referral by typing any of the following criteria (please note that you must separate each piece of search data with a comma):
   a. Patient first / last name
   b. Referring user / provider / organization name
   c. Referred to provider / organization name
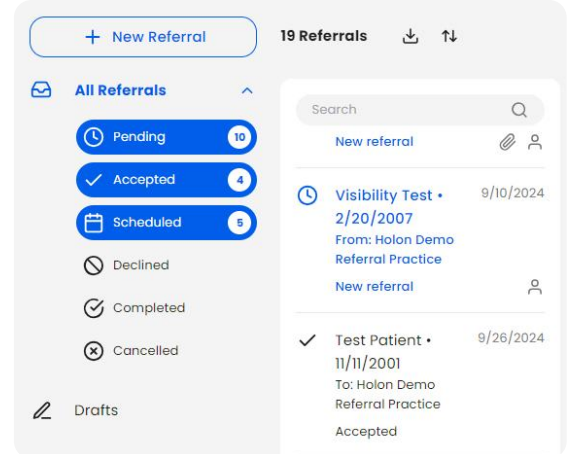
B If none of the above suggestions work and you still cannot find your missing referral, please contact **support@holonsolutions.com** to assist. Please include the following information:

1. Your organization's name
2. Date and time the missing referral was sent
3. Patient first / last name
4. Referring user / provider / organization name
5. Referred to provider / organization name

14   How do I assign a referral to someone?

💡 Currently, only those organizations that receive a referral can use the assign feature. Opening this feature up to both the sending and receiving organizations is on the Holon roadmap!

A To assign a referral to another user in your organization, you will first need to select an unassigned referral. Once inside, please select the blue "unassigned" link at the top of the referral.

B This will open a drop down menu where you can search for / select a user to assign the referral to.
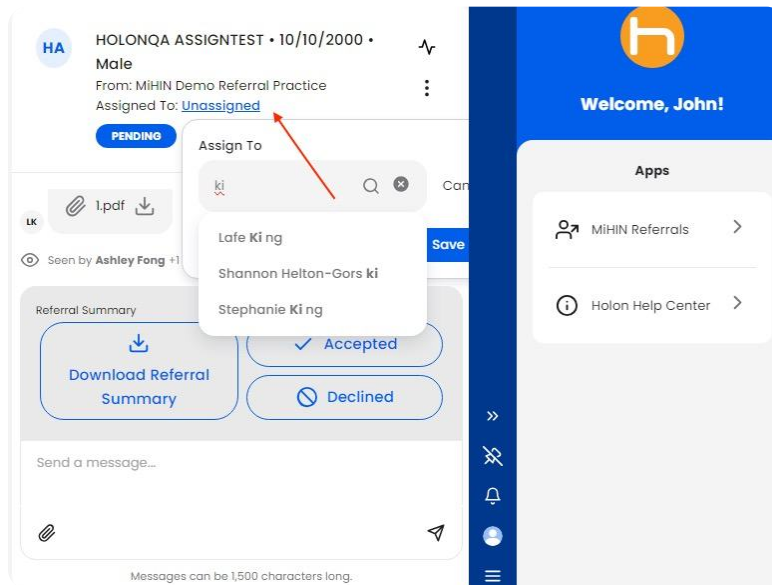
15   How will I know when I get a new referral sent to me?

Once you have received a new referral, it will automatically display at the top of your inbox with the Pending status in bold blue text (depending on sorts / filters currently applied). The inbox automatically refreshes and displays new referrals.

Troubleshooting Questions

16   Why have I not gotten any new referrals since the system upgrade?

> 💡 Organizations need at least 1 provider user in order to be referable in the MiHIN Referrals app. If your organization does not want to include any providers, a team account can be created to satisfy this requirement. Please contact **support@holonsolutions.com** to assist with this new requirement.

If you have not received any new referrals since the upgrade, or have heard from others that your organization is not referable in the MiHIN Referrals app, please contact **support@holonsolutions.com** to confirm that your organization has been properly provisioned on the new platform.

17   I cannot find a provider / organization in the MiHIN Referrals app that I want to refer to. How can I find / add them?

If you are not able to find a specific provider or organization that you believe should appear on this list, please contact **support@holonsolutions.com** to assist. Please include the following details, if possible:
1. Name of the organization
2. Provider's first and last name

18   I cannot find a specific provider from my organization that I need to send a referral on behalf of. How can I get them added to my Referring Provider list?

If you are not able to find a specific provider from your team on the Referring Provider field in the referral form, please have your organization's administrator contact **support@holonsolutions.com** to assist. Please include the following details for the missing provider user:
1. Name of the organization
2. Provider's first and last name
3. Provider's email address
4. Provider's NPI

19 When I try to update a referral, a white box appears inside my ribbon. How do I fix this?
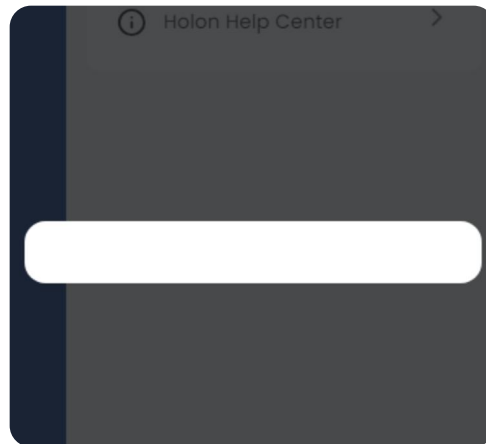
A When this white box appears and obstructs the ribbon window, you may be experiencing a bug or a technical error. To troubleshoot this issue you can try clearing your cache in the Holon app:

1. Step-by-step guide on clearing your cache / local Holon app data: **Clearing Local Data**
2. Open the Profile & Settings page by clicking the person icon at the bottom of the navigation bar
3. Select Clear Local Data
    a. Please note that completing this action will automatically log you out of the app, and your account information will need to be manually re-entered on the login screen. Make sure you have your account credentials prepared for re-entry.
4. Log back in and see if your error has been resolved
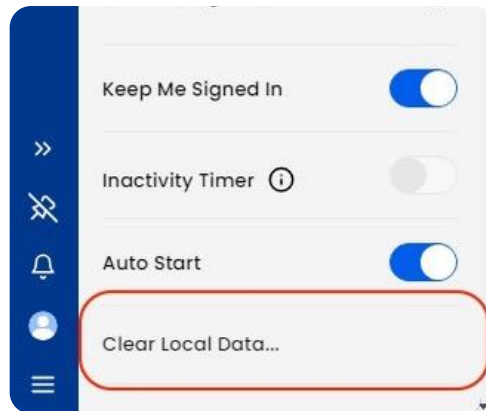
B If the above troubleshooting steps do not resolve the error, please contact **support@holonsolutions.com** to assist, and include the following information:

1. Organization name
2. What happened in the MiHIN Referrals app that led to this display error
3. Screenshot of the error (if possible)