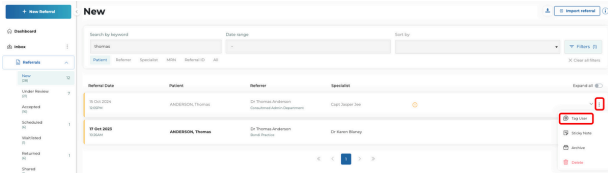


# How to Use the 'Tag User' Feature

The **'Tag User'** feature allows you to assign tasks, ask questions, or share updates with team members. Tagged users receive in-app or email notifications where applicable, and they can filter and track items in which they've been tagged. There are two main ways to access and use this feature.

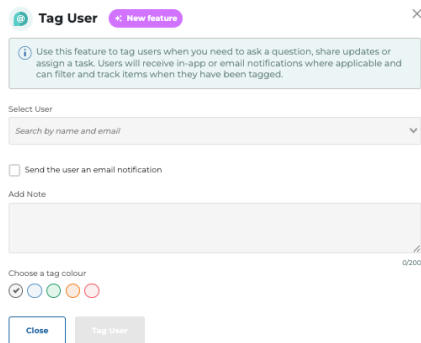
## Option 1: Tag a user from a referral listed in your dashboard

**Step 1:** From your dashboard, locate the referral that you want to tag. Click the '⋮' on the right side and select **'Tag User'**.



**Step 2:** A pop-up window will appear. Search the user you wish to tag by name or email address.

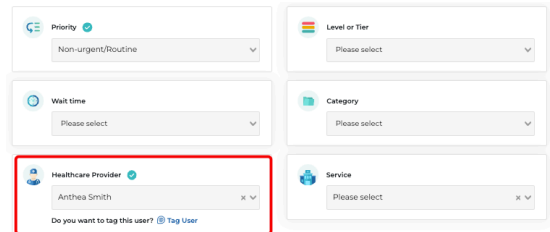
**Note:** Ticking **'Send the user an email notification'** alerts the tagged user via email. You may also include a note, which will appear in the email notification.



**Step 3:** Choose a tag colour, then click **'Tag User'** or **'Tag and Notify User'** (shown when the email notification checkbox is selected).

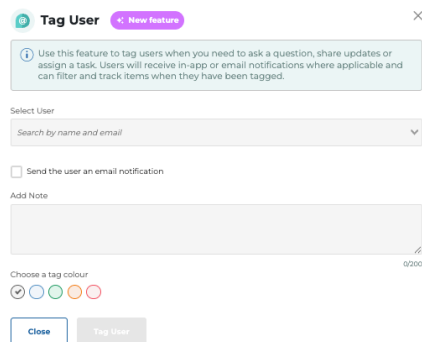
## Option 2: Tag a user while triaging a referral

**Step 1:** On the triage page (shown when accepting, scheduling, and waitlisting a referral) in the **'Healthcare Provider'** section, you'll see **'Do you want to tag this user?'**. Click **'Tag User'** once a user has been selected.



**Step 2:** A pop-up window will appear. Search the user you wish to tag by name or email address.

**Note:** Ticking **'Send the user an email notification'** alerts the tagged user via email. You may also include a note, which will appear in the email notification.



**Step 3:** Choose a tag colour, then click **'Tag User'** or **'Tag and Notify User'** (shown when the email notification checkbox is selected).