

# Prospects

Prospects are potential clients or patients who could utilize in-home non-medical services, including seniors with health issues, post-operative individuals, or anyone in need of assistance with daily tasks. These opportunities allow home healthcare employees to offer their specialized care.

- [New Referral](#)

# New Referral

A new referral is a formal process by which a medical professional, such as a physician or nurse, recommends and arranges for a patient to receive specialized healthcare services. This typically includes skilled nursing, therapy, and personal care services, aiming to promote recovery, manage chronic conditions, or enhance the patient's quality of life.

## Adding New Referral

Note: All Fields marked with \* are mandatory and must be filled out, otherwise the system will generate an error indicating that the required information is missing.

**Prospects >> + Add option**

The New Referral details can be added in the system by using the option Prospects. Update the required information and click Save option. The user can also Attach form for new Referral in the system.

1New referral2Waitlisted3Complete

First Name\*

First Name

Phone\*

Contact

State

Select

Date\*

Date

CallLog \ Notes\*

Notes

Role Name

Role Name

Last Name\*

Last Name

Address

Address

Zip Code

XXXXXX

Call Type

Select

Visible To

Email

Email

City

City

Related With Patient

Select Patient Name

Status

Select

Group

Group

Attach Form

Reset

Save

## Edit New Referral

**Prospects >> List**

Select the New Referral from the List and click Edit option under Action. Edit the required information and click Update option.

CAPTURE CALL LIST

Refresh

Active

+ CaptureCall

	Name	Contact	Address	Email	Notes	Status	Assignee	Action
<input type="checkbox"/>	<input type="text" value="Name"/>	<input type="text" value="Contact"/>	<input type="text" value="Address"/>	<input type="text" value="Email"/>	<input type="text" value="Notes"/>	<input type="text" value="Status"/>		<div>SearchReset</div>
<input type="checkbox"/>	demo, testing	213213312		testing123@gmail.com	asdadada			<div>Action</div>

Showing 1 to 1 of 1 records

Edit

Delete

1 New referral

2 Waitlisted

3 Complete

Created By : Admin, Master Created Date :Oct 5, 2023

First Name\*

testing

Last Name\*

demo

Email

testing123@gmail.com

Phone\*

213213312

Address

Address

City

City

State

Select

Zip Code

XXXXX

Related With Patient

Select Patient Name

Date\*

10/04/2023

Call Type

New Referral

Status

Select

CallLog \ Notes\*

asdadada

Role Name

Role Name

Visible To

Group

Group

Attach Form

Reset

Update

# Delete Referral

Prospects >> List



Select the Referral from list and Click Delete option under Action or Click Delete Selected option on the screen.

CAPTURE CALL LIST

 Refresh    Active      Delete Selected     CaptureCall

	Name	Contact	Address	Email	Notes	Status	Assignee	Action
<input checked="" type="checkbox"/>	<input type="text" value="Name"/>	<input type="text" value="Contact"/>	<input type="text" value="Address"/>	<input type="text" value="Email"/>	<input type="text" value="Notes"/>	<input type="text" value="Status"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>
<input checked="" type="checkbox"/>	demo, testing	213213312		testing123@gmail.com	asdadada			<input type="button" value="Action"/>

Showing 1 to 1 of 1 records

-  Edit
-  Delete