

# 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 in the comfort of their own home. 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.

The screenshot displays a web form for adding a new referral. At the top, a progress bar indicates three steps: 1. New referral (active), 2. Waitlisted, and 3. Complete. The form contains several mandatory fields marked with an asterisk (\*):

- First Name\***: Text input field with placeholder "First Name".
- Last Name\***: Text input field with placeholder "Last Name".
- Email**: Text input field with placeholder "Email".
- Phone\***: Text input field with placeholder "Contact".
- Address**: Text input field with placeholder "Address".
- City**: Text input field with placeholder "City".
- State**: Dropdown menu with "Select" as the current selection.
- Zip Code**: Text input field with placeholder "XXXXX".
- Related With Patient**: Dropdown menu with "Select Patient Name" as the current selection.
- Date\***: Date picker with a calendar icon and placeholder "Date".
- Call Type**: Dropdown menu with "Select" as the current selection.
- Status**: Dropdown menu with "Select" as the current selection.

Below these fields is a large text area labeled **CallLog \ Notes\*** with a placeholder "Notes". At the bottom of the form, there are three more dropdown menus: **Role Name** (placeholder "Role Name"), **Visible To** (placeholder "Visible To"), and **Group** (placeholder "Group").

At the bottom left, there is a blue button labeled **Attach Form**. At the bottom right, there are two buttons: a red **Reset** button and a green **Save** button.

## 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"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>
<input type="checkbox"/>	demo, testing	213213312		testing123@gmail.com	asdadada			<input type="button" value="Action"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

Showing 1 to 1 of 1 records

1 New referral 2 Waitlisted 3 Complete

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

**First Name\***  **Last Name\***  **Email**

**Phone\***  **Address**  **City**

**State**  **Zip Code**  **Related With Patient**

**Date\***  **Call Type**  **Status**

**CallLog \ Notes\***

**Role Name**  **Visible To**  **Group**

# 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