

Agency

An agency is an organization that provides a wide range of medical and non-medical services to individuals in their own homes. These agencies offer personalized care for patients to receive quality care while maintaining their independence.

Adding Agency

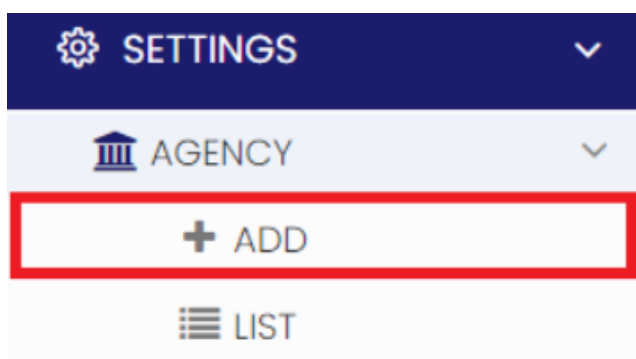
Note: All Fields marked with * are mandatory and must be filled out, otherwise the system will generate an error indicating that the required information is missing.

Settings >> Agency >> +Add option

The Referral Agency names can be added in the system using the option Agency under Settings. The healthcare providers can efficiently coordinate care plans, medication schedules, and treatment protocols across different disciplines and locations.

The healthcare professionals such as nurses, therapists, aides and other caregivers who deliver medical care, assistance with daily activities and emotional support to patients who may be recovering from illness, managing chronic conditions or in need of long-term care.

Locate the +Add option under Agency Tab.



Now, update the required information in Agency Details and Click Save option.

ADD AGENCY

Agency

Agency Details

Agency NPI
Agency NPI

Region
Select Region

State
Arizona

Fax
(XXX) XXX-XXXX

Phone
(XXX) XXX-XXXX

Mobile Number
(XXX) XXX-XXXX

Taxonomy
Primary Taxonomy
Selected Taxonomy
State
License Number

Agency Name*
Agency Name

TIN
TIN

EIN
EIN

Address
Address

City
City

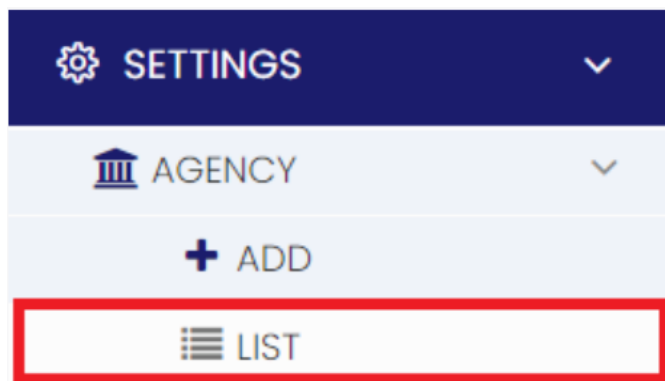
Zip Code
XXXXX - XXXX

Save
Cancel

Editing Agency

Settings >> Agency >> List





Locate list option under Agency Tab.



Select the Agency from List and Click Edit option on the right side of the screen.

AGENCY LIST AGENCY INFORMATION

☐
Refresh
Active
+ Agency

Agency Type	Agency Name ^	Region	TIN	EIN	Mobile Number	Phone	Address	Action
Select	Agency Name	Select Region	TIN	EIN	Mobile Number	Phone	Address	Search Reset
<input type="checkbox"/> ReferralSource	Eliza Agency	ROCKYMOUNT			8652123123	3105487989	PO BOX 1524	 
<input type="checkbox"/> ReferralSource	New Testing	N/A			6988744121	8454656412	po box 3698	 

Showing 1 to 2 of 2 records

Now Edit the required information and Click Update option.

EDIT AGENCY - ELIZA AGENCY

Agency

Agency Details

Agency NPI	<input type="text" value="Agency NPI"/>	Agency Name*	<input type="text" value="Eliza Agency"/>	
Region	<input type="text" value="ROCKYMOUNT"/>	TIN	<input type="text" value="TIN"/>	
State	<input type="text" value="Arizona"/>	EIN	<input type="text" value="EIN"/>	
Fax	<input type="text" value="(XXX) XXX-XXXX"/>	Address	<input type="text" value="PO BOX 1524"/>	
Phone	<input type="text" value="(310) 548-7989"/>	City	<input type="text" value="Los Angeles"/>	
Mobile Number	<input type="text" value="(865) 212-3123"/>	Zip Code	<input type="text" value="90005 - xxxx"/>	
Taxonomy	Primary Taxonomy	Selected Taxonomy	State	License Number

Update

Cancel

Delete Agency

Settings >> Agency >> List

Select the Agency from the list using the check box and click Delete or Disable Selection option on the screen.

AGENCY LIST AGENCY INFORMATION

☐ Refresh Active

Disable Selected

 + Agency

	Agency Type	Agency Name ^	Region	TIN	EIN	Mobile Number	Phone	Address	Action
	Select	<input type="text" value="Agency Name"/>	Select Region	<input type="text" value="TIN"/>	<input type="text" value="EIN"/>	<input type="text" value="Mobile Number"/>	<input type="text" value="Phone"/>	<input type="text" value="Address"/>	Search Reset
<input checked="" type="checkbox"/>	ReferralSource	Eliza Agency	N/A			8652123123	3105487989	PO BOX 1524	<div><div></div><div></div></div>
<input type="checkbox"/>	ReferralSource	New Testing	N/A			6988744121	8454656412	po box 3698	<div><div></div><div></div></div>

Now, the Agency gets deleted and we can view the Agency under Deleted list.

AGENCY LIST AGENCY INFORMATION

☐ Refresh Deleted + Agency

	Agency Type	Agency Name ^	Region	TIN	EIN	Mobile Number	Phone	Address	Action
	Select	<input type="text" value="Agency Name"/>	Select Region	<input type="text" value="TIN"/>	<input type="text" value="EIN"/>	<input type="text" value="Mobile Number"/>	<input type="text" value="Phone"/>	<input type="text" value="Address"/>	Search Reset
<input type="checkbox"/>	ReferralSource	Eliza Agency	N/A			8652123123	3105487989	PO BOX 1524	<div><div></div><div>Active</div></div>

The user can also Restore the deleted Agency by using the option Active on the right side of the screen.

AGENCY LIST AGENCY INFORMATION

☐ Refresh Deleted [+ Agency](#)

Agency Type	Agency Name ^	Region	TIN	EIN	Mobile Number	Phone	Address	Action
Select	Agency Name	Select Region	TIN	EIN	Mobile Number	Phone	Address	Search Reset
<input type="checkbox"/> ReferralSource	Eliza Agency	N/A			8652123123	3105487989	PO BOX 1524	 Active

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