

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

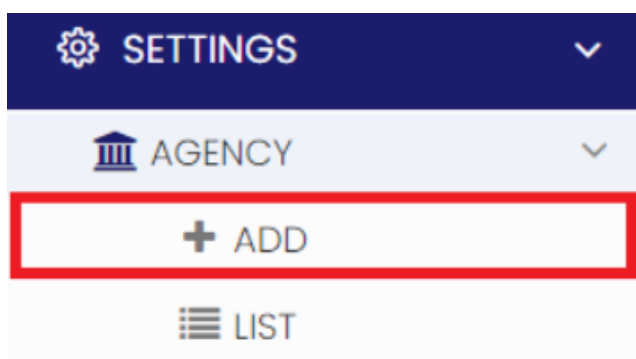
Note: All Fields marked with * are mandatory and must be filled out, otherwise the system will generate an error indicating that the required information is missing.

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

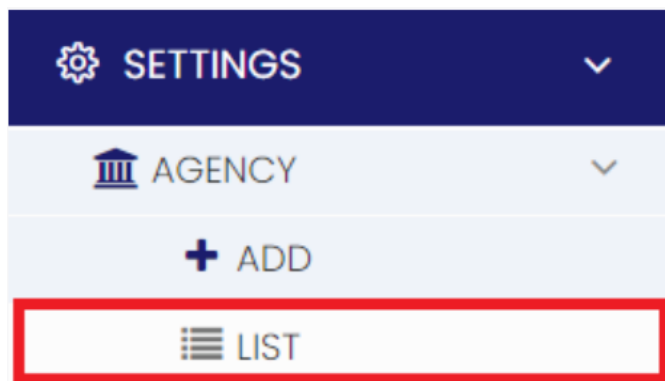
Zip Code
XXXXX - XXXX

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 checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> ReferralSource	New Testing	N/A			6988744121	8454656412	po box 3698	<input checked="" type="checkbox"/> <input type="checkbox"/>

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

Agency NPI

Region

ROCKYMOUNT

State

Arizona

Fax

(XXX) XXX-XXXX

Phone

(310) 548-7989

Mobile Number

(865) 212-3123

Agency Name*

Eliza Agency

TIN

TIN

EIN

EIN

Address

PO BOX 1524

City

Los Angeles

Zip Code

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

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	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	

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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