

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.

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

ResetSave

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

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* **Last Name*** **Email**

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

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

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

CallLog \ Notes*

Role Name **Visible To** **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"/>		Search Reset
<input checked="" type="checkbox"/>	demo, testing	213213312		testing123@gmail.com	asdadada			Action ▾

Showing 1 to 1 of 1 records

-  Edit
-  Delete