

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 referral

2Waitlisted

3Complete

| | | |
|----------------------------------|--------------------------------|--|
| First Name* First Name | Last Name* Last Name | Email Email |
| Phone* Contact | Address Address | City City |
| State Select | Zip Code XXXXXX | Related With Patient Select Patient Name |
| Date* Date | Call Type Select | Status Select |
| CallLog \ Notes* Notes | | |
| Role Name Role Name | Visible To | 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"/> | | <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*

Last Name*

Email

Phone*

Address

City

State

Select

Zip Code

Related With Patient

Select Patient Name

Date*

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

Showing 1 to 1 of 1 records

-  Edit
-  Delete