

Agency

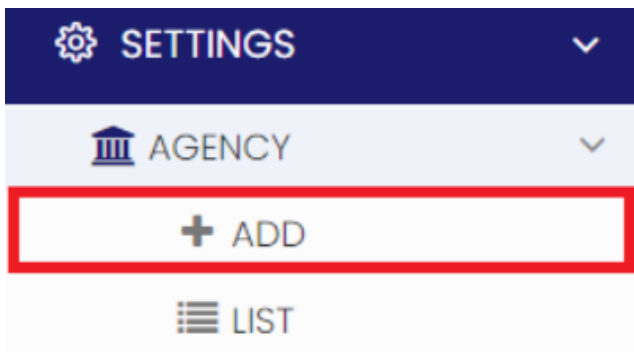
An agency is an organization that provides a wide range of medical and non-medical services to individuals in their own homes. These agencies offer personalized care for patients to receive quality care while maintaining their independence.

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

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

Province

Fax

(xxx) xxx-xxxx

Phone

(xxx) xxx-xxxx

Mobile Number

(xxx) xxx-xxxx

Agency Name*

Agency Name

TIN

TIN

EIN

EIN

Address

Address

City

City

Postal Code

XXXX

Taxonomy

Primary Taxonomy

Selected Taxonomy

Province

License Number

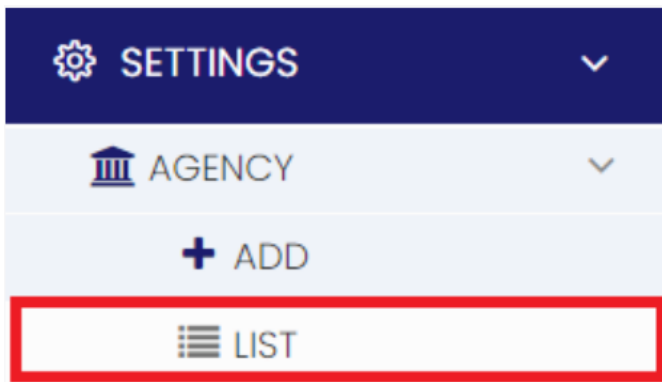
Save

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

Showing 1 to 2 of 2 records

Now Edit the required information and Click Update option.

EDIT AGENCY - TESTING APP

Agency

Agency Details

Agency NPI	15454878	Agency Name*	Testing app	
Region	testing	TIN	TIN	
Province	Eastern Cape	EIN	EIN	
Fax	(xxx) xxx-xxxx	Address	po box testing	
Phone	(568) 745-6325	City	test	
Mobile Number	(647) 897-8945	Postal Code	2222	
Taxonomy	Primary Taxonomy	Selected Taxonomy	Province	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	Active

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

Revision #3
Created 22 November 2023 19:33:28 by Thamarai
Updated 25 November 2023 15:57:51 by Thamarai