

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.

The screenshot displays a web form for adding a new referral. At the top, a progress bar indicates three steps: 1. New referral (active), 2. Waitlisted, and 3. Complete. The form contains the following fields:

- First Name***: Text input field.
- Last Name***: Text input field.
- Email**: Text input field.
- Phone***: Text input field.
- Address**: Text input field.
- City**: Text input field.
- State**: Dropdown menu with "Select" option.
- Zip Code**: Text input field with "XXXXXX" placeholder.
- Related With Patient**: Dropdown menu with "Select Patient Name" option.
- Date***: Date picker field.
- Call Type**: Dropdown menu with "Select" option.
- Status**: Dropdown menu with "Select" option.
- CallLog \ Notes***: Large text area for notes.
- Role Name**: Dropdown menu with "Role Name" option.
- Visible To**: Dropdown menu.
- Group**: Dropdown menu with "Group" option.

At the bottom left, there is an "Attach Form" button. At the bottom right, there are "Reset" and "Save" buttons.

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

Showing 1 to 1 of 1 records

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**

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

Showing 1 to 1 of 1 records

-  Edit
-  Delete

Revision #1

Created 22 November 2023 19:33:29 by Thamarai

Updated 22 November 2023 19:33:29 by Thamarai