Add, Edit, Inactivate, and Restore Referral Sources

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About

If the Referral Source field is available on the Face Sheet, you have the ability to select who referred the client to your Agency or add a new referral source. You can also add, edit, and inactivate referral sources from Referral Source Management.

> **User Permission**: In order to have access to Referral Source Management, a user must have the Referral Source Management permission enabled.

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Add a New Referral Source

Via the Face Sheet

If you cannot find who referred the client to your Agency in the Referral Source drop-down menu, you can add it directly from the Face Sheet and it will be added to the list of options.

1. Navigate to the client's Face Sheet: **Main Menu > Admissions Menu > Face Sheet**.
2. Search for the client and select **Edit** if the client already exists in the system or click the **Add New** button to start a new Face Sheet.
3. Click **Click Here to Add a New Referral Source**.

Referral Source	Select A Referral Source ▼
Click Here to Add a New Referral Source	New Referral Source will be stored in the list when the Client is saved.)

4. Enter in the details of who referred the client.
5. Click **Add This Referral Source**.

New Referral Source Facility:			
First Name:		Last:	
Title:		NPI#:	
Address:			
Address 2:			
City:		State:	Zip:
Business Phone:		Cell:	
Fax #:		Email:	

Add This Referral Source   Cancel

Via Referral Source Management

1. Navigate to Referral Source Management: **Main Menu > Admin Tools Menu > Referral Source Management**.
2. Click **New**.
3. In the **Edit Form** window, complete the details of the source of referral.
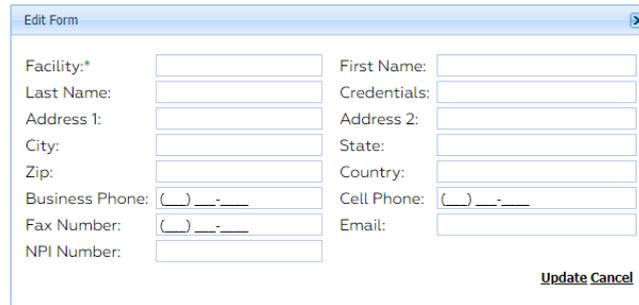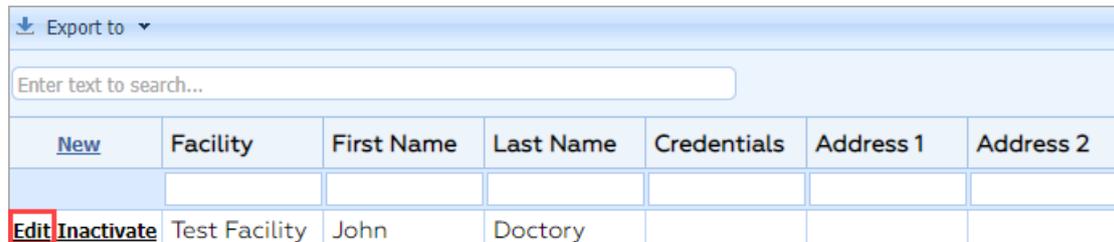
4. Click **Update**.

Edit a Referral Source

Referral Sources can easily be managed and updated via Referral Source Management. This is typically useful if someone enters the referral source and does not have all of the information at the time of collection or enters a detail that is incorrect.

1. Navigate to Referral Source Management: **Main Menu > Admin Tools Menu > Referral Source Management**.
2. Click **Edit** next to the record you want to modify.

3. In the Edit Form window, make changes as necessary.
4. Click **Update**.

Inactivate a Referral Source

Referral Sources can be inactivated so that they no longer show as an option in the Referral Source drop-down menu.

1. Navigate to Referral Source Management: **Main Menu > Admin Tools Menu > Referral Source Management**.
2. Click **Inactivate** next to the record you want to inactivate.
3. Click **Ok** in the pop-up that is displayed, "Confirm Inactivation?". The Referral Source is moved to the Inactive Referral Sources list.

Restore an Inactive Referral Source

Referral Sources can be reactivated to show as an option in the Referral Source drop-down menu.

1. Navigate to Referral Source Management: **Main Menu > Admin Tools Menu > Referral Source Management**.
2. Click the **Show Inactive Referral Sources** toggle button. The inactive sources are highlighted in gray.
3. Click **Restore** next to the record you want to activate.

	Show Inactive Referral Sources: ●							
⬇ Export to ▾								
Enter text to search...								
New	**Facility**	**First Name**	**Last Name**	**Credentials**	**Address 1**	**Address 2**	**City**	**State**
Edit Inactivate	doctor	Tester	test	Test123#	3201 University Dr.	Suite 250, 520 new adreess	Auburn Hills	BN
Edit Restore	Test Facility	John	Doctory					