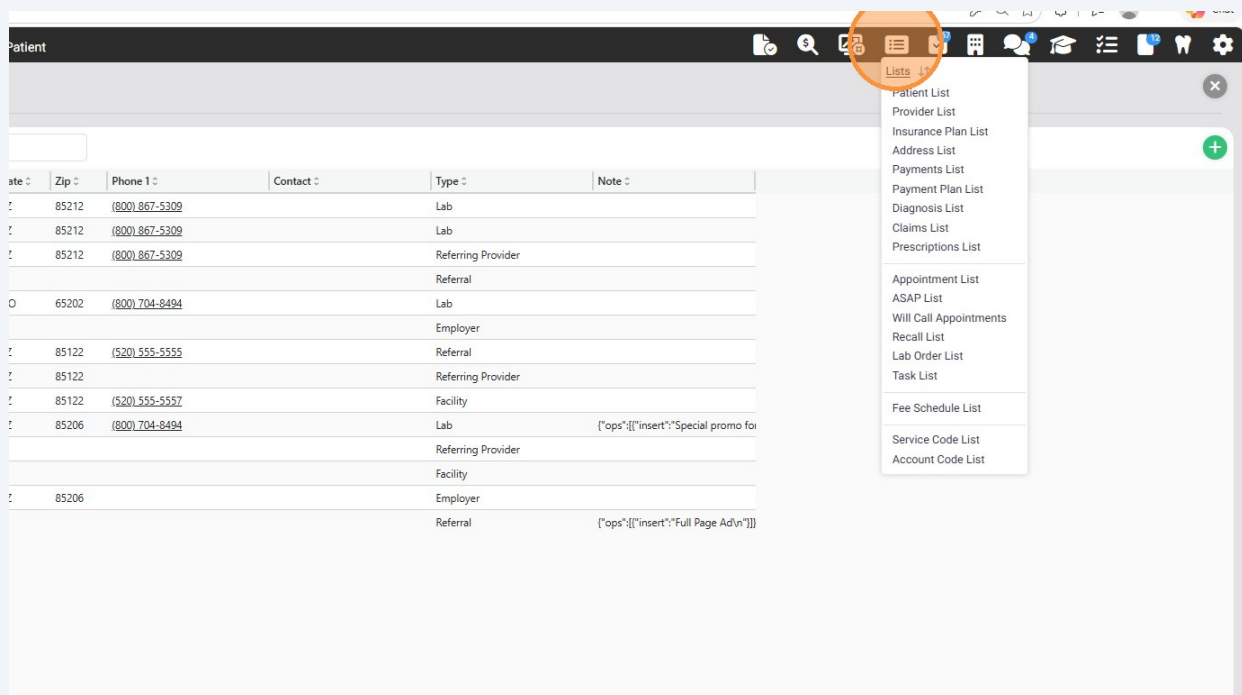


How To Add A New Contact to Address List

Learn how to efficiently manage your address directory and record patient referrals within your system. This guide provides a clear walkthrough for entering new contact details and updating patient records to ensure your information remains organized and current.

Referral Source Creation

1 Click the Lists icon in the top menu.



2 Click "Address List"

The screenshot shows a patient management interface. At the top, there's a header bar with the word 'Patient' and a search icon. Below the header is a table with columns: State, Zip, Phone 1, Contact, Type, and Note. The table contains several rows of patient data. On the right side, there's a dropdown menu titled 'Lists' with a list of options. The 'Address List' option is highlighted with a red circle.

State	Zip	Phone 1	Contact	Type	Note
AZ	85212	(800) 867-5309		Lab	
AZ	85212	(800) 867-5309		Lab	
AZ	85212	(800) 867-5309		Referring Provider	
				Referral	
MO	65202	(800) 704-8494		Lab	
				Employer	
AZ	85122	(520) 555-5555		Referral	
AZ	85122			Referring Provider	
AZ	85122	(520) 555-5557		Facility	
AZ	85206	(800) 704-8494		Lab	{ "ops": { "insert": "Special promo for
				Referring Provider	
				Facility	
AZ	85206			Employer	
				Referral	{ "ops": { "insert": "Full Page Ad\n" }}

- Patient List
- Provider List
- Insurance Plan List
- Address List**
- Payments List
- Payment Plan List
- Diagnosis List
- Claims List
- Prescriptions List
- Appointment List
- ASAP List
- Will Call Appointments
- Recall List
- Lab Order List
- Task List
- Fee Schedule List
- Service Code List
- Account Code List

3 Click the Add (+) button to create a new address entry.

The screenshot shows the same patient management interface as before. The table of patient data is visible. On the right side, there's a red circular button with a white plus sign and the word 'New' below it. This button is highlighted with a red circle.

State	Zip	Phone 1	Contact	Type	Note
AZ	85212	(800) 867-5309		Lab	
AZ	85212	(800) 867-5309		Lab	
AZ	85212	(800) 867-5309		Referring Provider	
				Referral	
MO	65202	(800) 704-8494		Lab	
				Employer	
AZ	85122	(520) 555-5555		Referral	
AZ	85122			Referring Provider	
AZ	85122	(520) 555-5557		Facility	
AZ	85206	(800) 704-8494		Lab	{ "ops": { "insert": "Special promo for
				Referring Provider	
				Facility	
AZ	85206			Employer	
				Referral	{ "ops": { "insert": "Full Page Ad\n" }}

4

When entering a new contact; you will select the TYPE of contact from the drop down menu.

The TYPE is what determines where the contact is filtered throughout the system.

The screenshot shows the 'Address Entry' form in the FLOW system. The 'Main Information' section includes fields for Code, Company Name, Last Name, and a 'Type' dropdown menu. The 'Type' menu is open, displaying a list of options: Employer, Referral, Referring Provider, Facility, and Lab. The 'Referral' option is highlighted with an orange circle. To the right, the 'Address & Contact' section contains fields for Street, State, Phone 1, and Contact. Below the main information is a 'Notes' section with a text area for inserting notes.

5

Click "Save Changes" to create the referral source.

The screenshot shows the 'Address Entry' form in the FLOW system. The 'Main Information' section includes fields for Code, Company Name, Last Name, and a 'Type' dropdown menu. The 'Type' menu is now closed, and the 'Referral' option is selected. The 'Company Name' field contains the text 'Pinterest'. The 'Address & Contact' section contains fields for Street, State, Phone 1, and Contact. Below the main information is a 'Notes' section with a text area for inserting notes. In the left sidebar, the 'Save Changes' button is highlighted with an orange circle.

6 Click "Close" to exit the Address Entry screen.

Address Entry

Main Information

Code
PIN ☐ Inactive

Company Name
Pinterest Type
Referral

Last Name First Name

Address & Contact

Street Street (Cont)

State Postal Code

Phone 1 Phone 2

Contact

Notes

Notes
Insert notes here ...

7 As an example of where these filters are used: On the patient information screen under Referral Information, under the Referral Source drop-down menu will only display contacts that are listed with the TYPE Referral.

If we looked and the drop-down for Referring Providers, only the contacts from the address list with the TYPE Referring Provider will show.

Personal Information

VIP ☐ Not a Patient ☐
Deceased ☐ Inactive ☐

Middle Initial Last Name Amande

Birth Date 05/01/1985

Marital Status

Driver's License d156154654

Eligibility Status Eligibility Not Checked

Referral Information

Referral Source Referring Provider

GOOG - Google Ad
PIN - Pinterest
REF00 - Referral Source
YEL00 - Yellow Pages

Family

Name	Gender	Birth Date	Next Appointment
Arizona, Sunny	F	12/12/02	6/17/26
Arizona, Summer (HoH)	F	1/1/77	9/26/26