Feature 527571: [Add a Person] Adding Referral information when adding new patient

[Features 527571](#)

Description

Goal: The goal is to allow users to capture or add referral information when adding a new patient into Fuse. This helps the offices to:

1. Add referral information when creating a new patient in Fuse by categorizing referrals into 'Patient, 'External Provider' (provider/practice details), and 'Other' (social media etc).

References:

- [Referral Tracking: Lucidspark](#)

UX Pin: [Final Design - UXPin Preview](#) (NEW COMPONENT) or [Referral Tracking - UXPin Preview](#)(OLD COMPONENT)

Update UX PIN: ⧗ https://www.figma.com/design/o5w2ZykuSKG5biA1noCksl/Fuse-%7c-Referral-Tracking-%28Old-UI%29?node-id=0-1&t=XOh2YSz1s8tFYt9d-1 Connect your Figma account

Acceptance Criteria

Navigation: Fuse│ Global Search │ Add a Person

Security/Permission: Practice Admin/ Exec. Dentist, Managerial Reporting Rights , add on Referral rights are added to the Associate Dentist, Office Manager, Hygienist, and Assistant roles.

As a Fuse user,

- I want to input and categorize referral information when adding a new patient so that I can track referrals from different sources (Patient, External Provider, Other) efficiently and ensure accurate record-keeping for reporting and follow-up.

Referral Categories

1. When the user is on the Global Search and click on the "Add a Person" button,
   a. I must see a new patient form, scrolling or clicking on the "Referral" tab should direct the user to the Referral section.
   b. I must see a "Referral Categories" dropdown field listing:
      i. External Provider: Capture details for referrals from external providers
      ii. Patient-Allow users to indicate that the referral came directly from a patient

iii. External Sources-Include an option for referrals from non-patient, non-provider sources (social media, referral sources).

Workflows

1. **Patient Referral Workflow**
   - Select "Patient" as the referral category.
   - Automatically populate patient details if the patient is already in the system or allow manual entry.

2. **External Provider Referral Workflow**
   - Select "External Provider" as the referral category.
   - Search for or manually enter the provider's name and practice name.
   - Autofill details if the provider exists in the system.
   - Allow the user to add referral notes specific to the external provider.

3. **Other (External Sources) Referral Workflow**
   - Select "External Sources" as the referral category.
   - Present a free form and dropdown field to describe the referral source
   - Option to input additional details such as organization name and contact information.

4. **Referral Information Display**
   - Display the selected referral category on the patient's profile and Clinical space, clearly indicating the source of the referral (Patient, External Provider, External Sources).
   - Ensure that referral details can be edited and updated if necessary.
   - The referral information should be visible and searchable in reports and dashboards.

5. In the Patient profile and Clinical space
   a. I must see that the default for the "**Referral Direction**" is "**Referral Out**"
6. I must see that "**Other**" is updated to "**External Sources**" for existing and new referrals
7. Add of referrals without patient id
8.