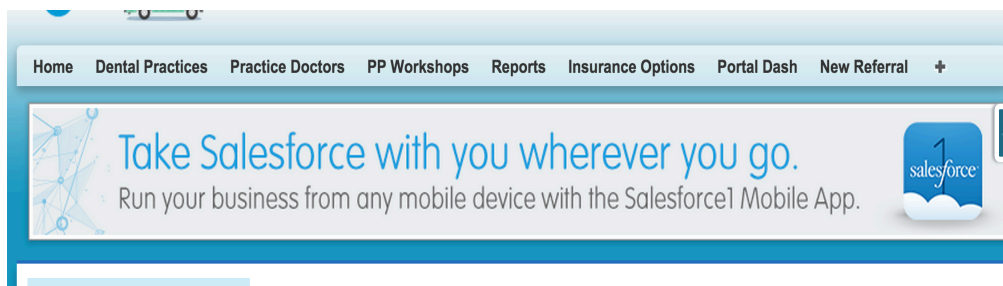


# Adding New Referrals

1. Click on the “New Referral” tab at the top of the page



2. Fill out their name and specify as much information as you can. At least the phone number and email are required so that we can contact them if necessary. In the “Notes” section write any notes about the patient that may be helpful or necessary. Salesforce is a secure site, so only ClearChoice employees that need to will see the notes.

A screenshot of the 'New Patient Referral' form in the Salesforce1 Mobile App. The form is titled 'New Patient Referral' and contains the following fields: First Name (Lisa), Last Name (Avrett), Gender (Female), Phone # ((303) 333-3333), Email (La@gmail.com), Street Address (144 S Kenton Way), City (Englewood), State (CO), Zip (80113), and Referral Notes (This patient has an upper and lower dentures). A 'Submit Referral' button is located at the bottom left of the form.

3. At this point there are two options. You can check “Request Contact” and ClearChoice will be notified to call or email the patient. Or you can click “Schedule Patient For Consult Now” and search for available time slots.

New Patient Referral

**Thank you for the referral.**  
*You can now schedule the patient for a consultation with us, or choose to have us contact the patient.*

☐ Request that we contact the patient  
☒ Schedule patient for a consult now

Consult Scheduled :

**Quick Search**

Day of the week :  
☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday  
☒ Friday ☒ Saturday ☒ Sunday

Appt Between : 7 AM and 11 PM

Start Date: 7/28/2015

Patient Consult Reminders: ☐ Text ☒ Call

[Search Available Consults](#)

**Available Consults**

Date	DOW	Start	Room	Initiative
7/28/2015	Tuesday	8:00 AM	Denver Room 1	<a href="#">Schedule Now</a>
7/28/2015	Tuesday	9:15 AM	Denver Room 1	<a href="#">Schedule Now</a>
7/28/2015	Tuesday	10:30 AM	Denver Room 1	<a href="#">Schedule Now</a>
7/28/2015	Tuesday	12:45 PM	Denver Room 1	<a href="#">Schedule Now</a>
7/28/2015	Tuesday	2:00 PM	Denver Room 1	<a href="#">Schedule Now</a>
7/28/2015	Tuesday	3:15 PM	Denver Room 1	<a href="#">Schedule Now</a>
7/29/2015	Wednesday	8:00 AM	Denver Room 1	<a href="#">Schedule Now</a>
7/29/2015	Wednesday	9:15 AM	Denver Room 1	<a href="#">Schedule Now</a>

4. Once you schedule your patient you will see this screen. The center will be notified of the appointment, the patient will get an email from ClearChoice and their appointment will be confirmed.

**ClearChoice**  
DENTAL IMPLANT CENTERS

Latest Activity Portal Dash **New Referral**

**New Patient Referral**

**Thank you for the referral.**

**Success** - Patient Lisa Avrett, has been scheduled for a consultation on **7/28/2015 08:00:00**.  
Please contact ClearChoice if any changes need to be made.

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