



# 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.
3. 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
4. Click “Submit Referral”
5. At this point there are two options. You can check “Request Contact” and ClearChoice will be notified to call or email the patient
6. Or you can click “Schedule Patient For Consult Now” and search for available time slots.
7. 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.