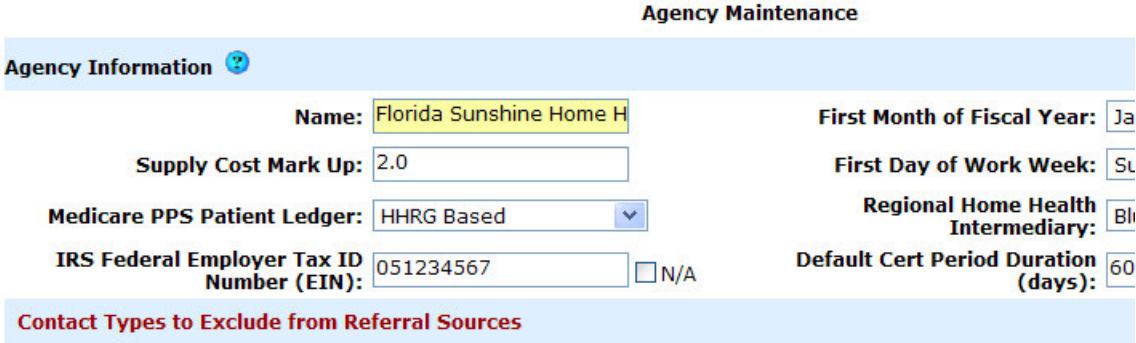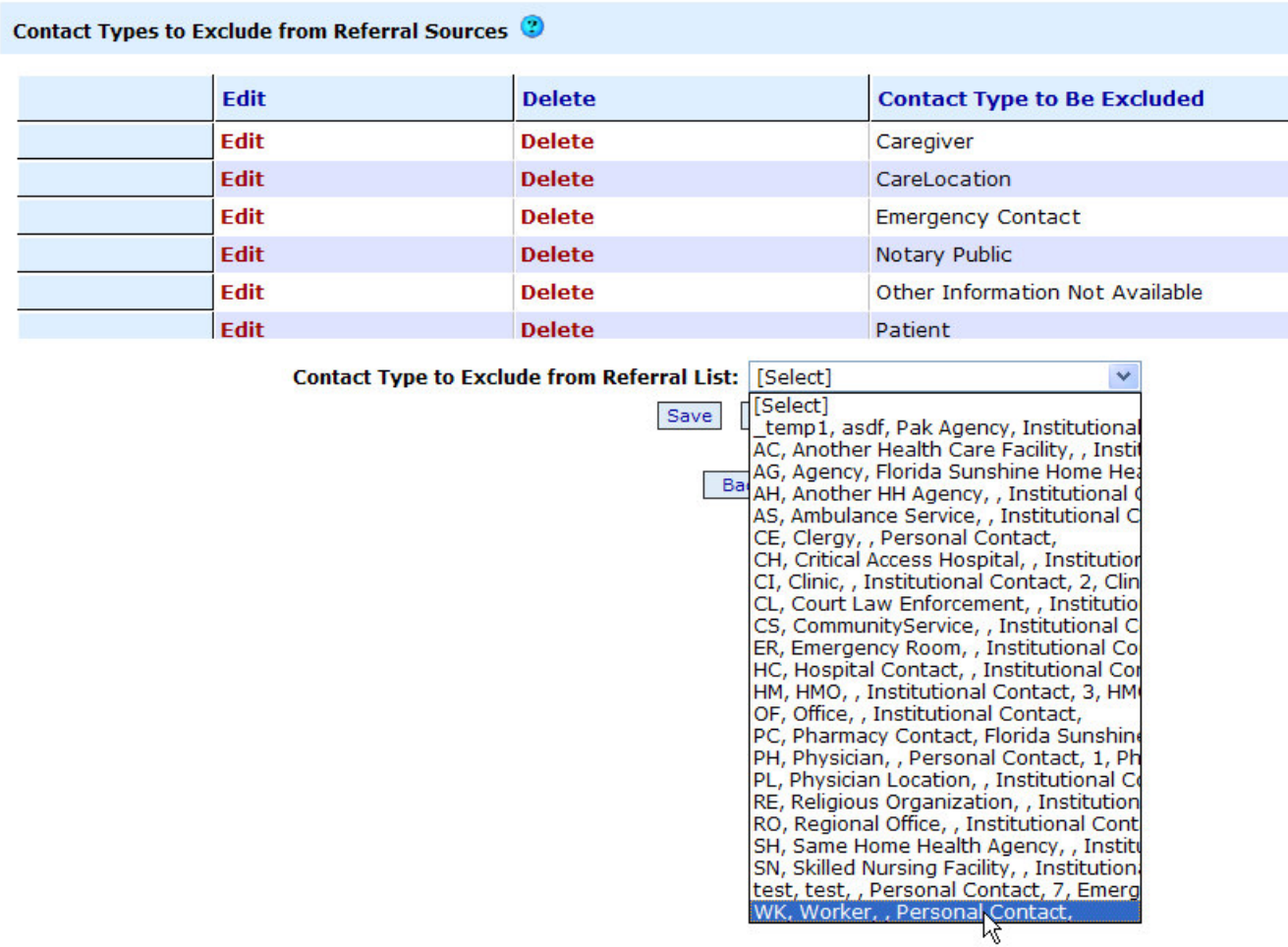# Instructions to exclude certain contact types from referral look-up

Action / Instruction	Screen Shot
Scenario: You want to exclude certain external contact types, such as 'worker' from the look-up list for patient referrals.	
1. ADMINISTRATIVE – Clinical Maintenance – Agency: select/display agency record; click **Contact Types to Exclude from Referral Sources** link	

The screen shot shows:

Agency Maintenance

Agency Information

Name: Florida Sunshine Home H

Supply Cost Mark Up: 2.0

Medicare PPS Patient Ledger: HHRG Based

IRS Federal Employer Tax ID Number (EIN): 051234567 ☐ N/A

First Month of Fiscal Year: Ja

First Day of Work Week: Su

Regional Home Health Intermediary: Bl

Default Cert Period Duration (days): 60

Contact Types to Exclude from Referral Sources

Action / Instruction	Screen Shot
2. Click [New Entry] button then choose an external contact type from drop-down list to be excluded the click [Save]. Repeat for each additional external contact type to be excluded.	**Contact Types to Exclude from Referral Sources** ❓ |	Edit	Delete	Contact Type to Be Excluded
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	Edit	Delete	Caregiver
	Edit	Delete	CareLocation
	Edit	Delete	Emergency Contact
	Edit	Delete	Notary Public
	Edit	Delete	Other Information Not Available
	Edit	Delete	Patient	 Contact Type to Exclude from Referral List: [Select] ⌄ [Select] _temp1, asdf, Pak Agency, Institutional AC, Another Health Care Facility, , Insti AG, Agency, Florida Sunshine Home Hea AH, Another HH Agency, , Institutional (AS, Ambulance Service, , Institutional C CE, Clergy, , Personal Contact, CH, Critical Access Hospital, , Institution CI, Clinic, , Institutional Contact, 2, Clin CL, Court Law Enforcement, , Institutio CS, CommunityService, , Institutional C ER, Emergency Room, , Institutional Co HC, Hospital Contact, , Institutional Con HM, HMO, , Institutional Contact, 3, HM OF, Office, , Institutional Contact, PC, Pharmacy Contact, Florida Sunshine PH, Physician, , Personal Contact, 1, Ph PL, Physician Location, , Institutional C RE, Religious Organization, , Institution RO, Regional Office, , Institutional Cont SH, Same Home Health Agency, , Institu SN, Skilled Nursing Facility, , Institution test, test, , Personal Contact, 7, Emerg WK, Worker, , Personal Contact, Save Ba