Create and manage a referral list

Manage a Professional Account · https://www.primaryrecord.com/docs/create-and-manage-a-referral-list/

You can create and manage a list of care team members and support people that you'd recommend to other clients in your resources. It's similar to a referral list that you would maintain to refer clients to other healthcare providers, organizations, or insurance recommendations.

1. On a mobile device or computer, open a browser, and sign into Primary Record.
2. Click **Resources > Care Team > Add Care Team Member**.
3. Choose the type of care team member they are and fill in their information.
4. Click **Save**.

As you grow this Care Team list, you can share a Care Team Member with a client as needed. For example, if a client is looking for a new pediatrician who specializes in COPD, and you know of a well-qualified one because of a client you had last year, you can share that pediatrician's information with this current client.