

An In-Depth Guide to Referral Management



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Introduction

It's no secret that referral programs are the key to running a successful dental practice. Referrals help patients get access to specialist care and ensure that the right people are being referred for the right reasons!

In order to gain those referrals and ensure your practice delivers great patient outcomes, your dental practice needs an effective referral management software.

But how do you know if your current referral process needs an upgrade?



5 Telltale Signs Your Practice Needs a Better Referral Program



1

You Find It Hard To Keep Track of Referral Statuses Via Several Different Channels

Do you find yourself struggling to keep track of all the referrals you're receiving? And, when you do get a referral, does following up with the referring practice become a tedious process?

Complex referral programs produce discouraging results¹, which is why it is important that a good referral plan is put in place. A question to ask is: How can the referral process be made easier for both the referring and the receiving practice?

With the right software, the solution is easy! Your practice needs a referral management system that standardizes and simplifies the referral process for both parties.



¹Mosley, M. (2021). The 6 Most Common Reasons Referral Programs Fail. Referral Rock. Retrieved May 18, 2022, from <https://referralrock.com/blog/reasons-referral-programs-fail/>

2

You Notice That Referring Practices Resort to Insecure Methods of Patient File Transfers

The digital revolution has made it possible to send and receive data with just one click of a button! And in healthcare, transferring patient files between practices is absolutely necessary.

However, this process can be complicated and time-consuming for administrative staff, so some practices resort to insecure methods of patient file transfers. This can lead to a breach in HIPAA or PIPEDA regulations and put your patients and dental practice at risk.

A data report from 2021² shows that there was a 71% increase in healthcare data breaches, which put patient safety and confidential data at risk.

How can you ensure that your practice is HIPAA compliant?

Automating your file transfers is a step in the right direction! This can help your practice send files securely, and one of the best ways to protect your patients' data is to ensure that your referral management software uses end-to-end encryption in their file transfer methods.

²Abyde. (2022, February 24). The Road to Meeting HIPAA Breach Reporting Requirements. JD Supra. Retrieved May 18, 2022, from <https://www.jdsupra.com/legalnews/the-road-to-meeting-hipaa-breach-1507788/>



3

Your Management Software Provides Limited Procedure Options

So you've hit a roadblock with your practice management software. The choices are limited, and you're having difficulty selecting the right reason for the patient referral.

Well, the problem with having limited procedure options is that referring practices can find it tough to communicate the exact reason for the referral, which can then make it difficult for you to analyze your past referrals to pick up trends. Accurate data is crucial to dental care³, so the right referral management software should allow practices to customize procedure names in order to provide consistent and precise information.



³ Oldfield, S. (n.d.). Clinical Referrals Are a Critical Part of the Transition Process. Orion Health. Retrieved May 19, 2022, from <https://orionhealth.com/au/knowledge-hub/white-papers/clinical-referrals-are-a-critical-part-of-the-transition-process/>

4 Having Trouble Standardizing Your Referral Procedure Due to Pushback From Referring Practices

No matter the reason, we understand that some senders are set in their ways, and it may be tough to get practices on board with using new referral systems, especially if it requires any effort on their end.

So what can you do?

Explain the benefits. By clarifying exactly how much time and energy both practices will save by working with each other, it makes it easier for the reluctant practice to understand the need for a better referral system.

Be patient and explain that it can take time for people to learn new things. But once the practices see the benefits of a referral software, they will surely be glad they got on board!



5

You Find it Difficult to Manage And Keep Track of Your Referral Relationships

When it comes to referrals, it's not easy to manage and keep track of every single relationship you've built with other practices. It can also be difficult to know which practices are referring the most patients.

So why is it important to establish and maintain a great referral network?

Building lasting partnerships with other practices in your area can lead to stronger dental relationships for the future.

If you aren't tracking your referral relationships, you are missing out on opportunities to grow your practice. It's time to invest in technology that can provide you with analytics on your best referral practices, and improve the quality of care for your patients!



Introducing: Intiveo's Two-Way Referral Management

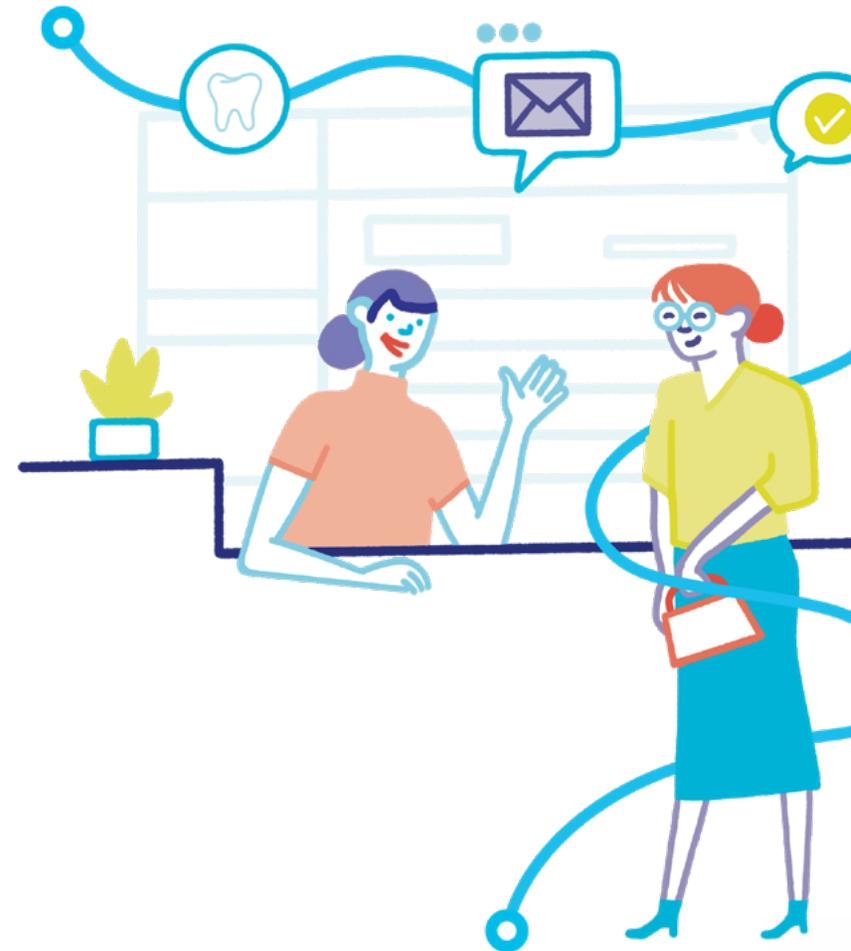


Introducing: Intiveo's Two-Way Referral Management

At Intiveo, we are committed to easing the referral process for dental practices and their network. As a result, we are extremely excited to announce Intiveo's Two-Way Referral Management!

Our Referral Management solution was built with general practices and specialties in mind to ensure that your referral processes have never been easier.

Let's take a look at the key benefits.



Optimize Your Referral Process

We've been working on a new system to help your dental practice optimize your referral management process.

Intiveo's Two-Way Referral Management Add-On allows you to send and receive referrals directly through your Intiveo platform. This gives both practices clear visibility on who referred each patient, so you can keep updated on the status of your patient's care.

But what if you experience pushback from other practices refusing to use a new software?

Don't worry, we had them in mind too! We believe that referral programs should be easy for both referrers and the recipients, so we've simplified our process to allow new senders to sign up and send referrals without having to be invited. And to make things even easier, receiving practices can now submit referrals through our system on the sending practice's behalf.

In fact, if the referring practice isn't completely sold on getting on board, you can ease the transition for them! Just enter some basic information about their practice, and this will encourage them to proceed with the referral in just a few steps.

⁴ Ho, J. (2021). 8 Reasons Your Referral Programs Could Be Failing. Referral Rock. Retrieved May 20, 2022, from <https://referralrock.com/blog/top-reasons-referral-programs-fail/>



Pro Tip: The more streamlined your process is, the higher the likelihood that practices will participate in your referral program!⁴

Reduce Communication Issues Between Practices

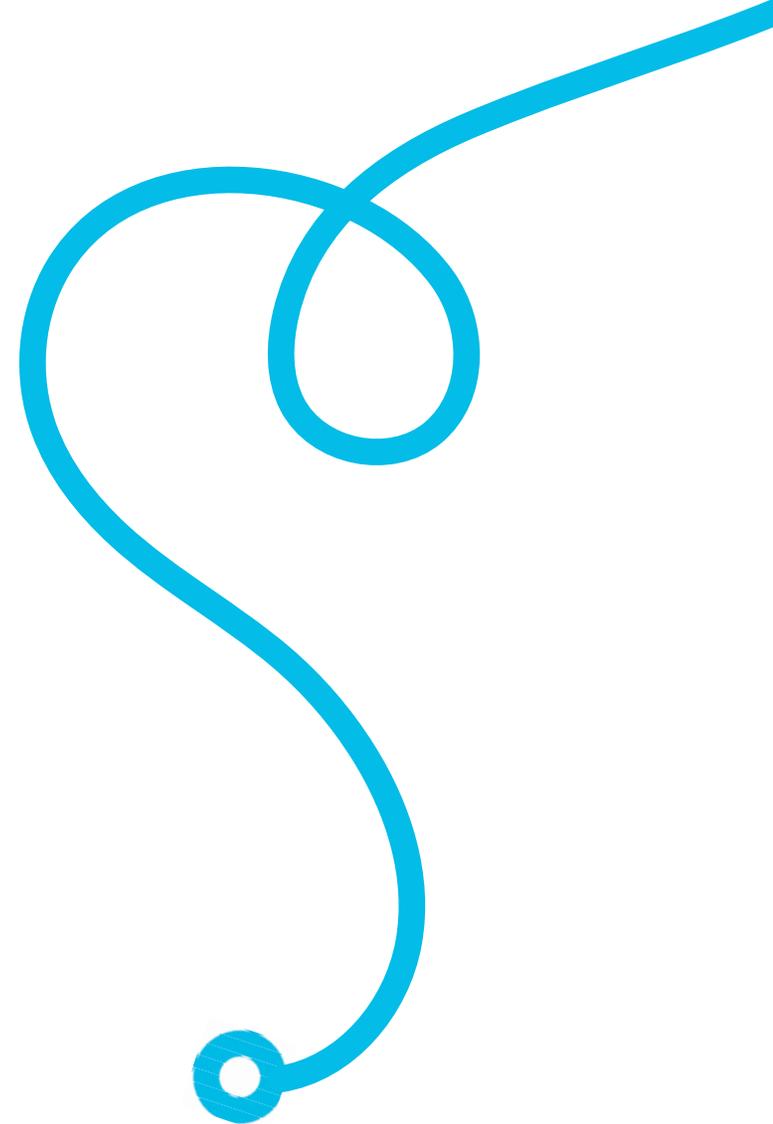
When a patient is referred to another practice, it can be hard for both practices to keep track of every communication regarding the patient. Of course, effective communication between providers plays a huge role in providing the best treatment outcomes for the patient.⁵

That's why we made it possible for you to track the status of your referred patients step-by-step to reduce any communication gaps between practices.

As always, we're all about ensuring that your patient's needs are met. To further reduce communication issues, we've made it easier for practices to send notes on a referral-by-referral basis, as well as customize procedure and provider names. An added benefit of custom procedure names is that it allows the receiving practice to analyze their referrals thoroughly.

With the help of these innovations, we truly believe that we've found a way to encourage practice efficiency and help dental practices overcome communication barriers.

⁵ *Understanding the Importance of Communication in Health Care.* (n.d.). Regis College Online. Retrieved May 20, 2022, from <https://online.regiscollege.edu/blog/importance-communication-health-care/>



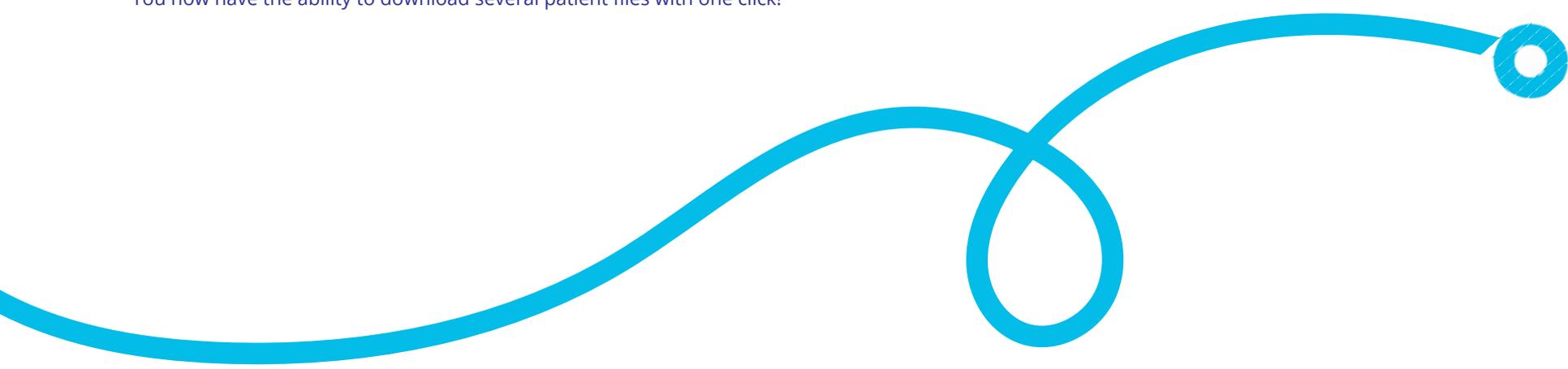
Transfer Patient Files With Confidence

We understand that your dental practice is dedicated to ensuring patient privacy. For that reason, we offer a secure, encrypted two-way file transfer tool so that you can send radiographs, photos, and referral letters to and from senders without having to worry about breaching HIPAA or PIPEDA rules.

We know how busy dental practices can get, and downloading each file manually can take minutes, if not hours, from your day.

So here's how we want to give you your time back:

- Imaging dates are collected automatically to ensure an efficient and timely image collection
- You now have the ability to download several patient files with one click!



Keep Your Friends Close and Your Best Referring Practices Closer

It's common knowledge that social reviews are a common metric used when measuring a practice's success. But did you know that referrals are just as important, if not more?

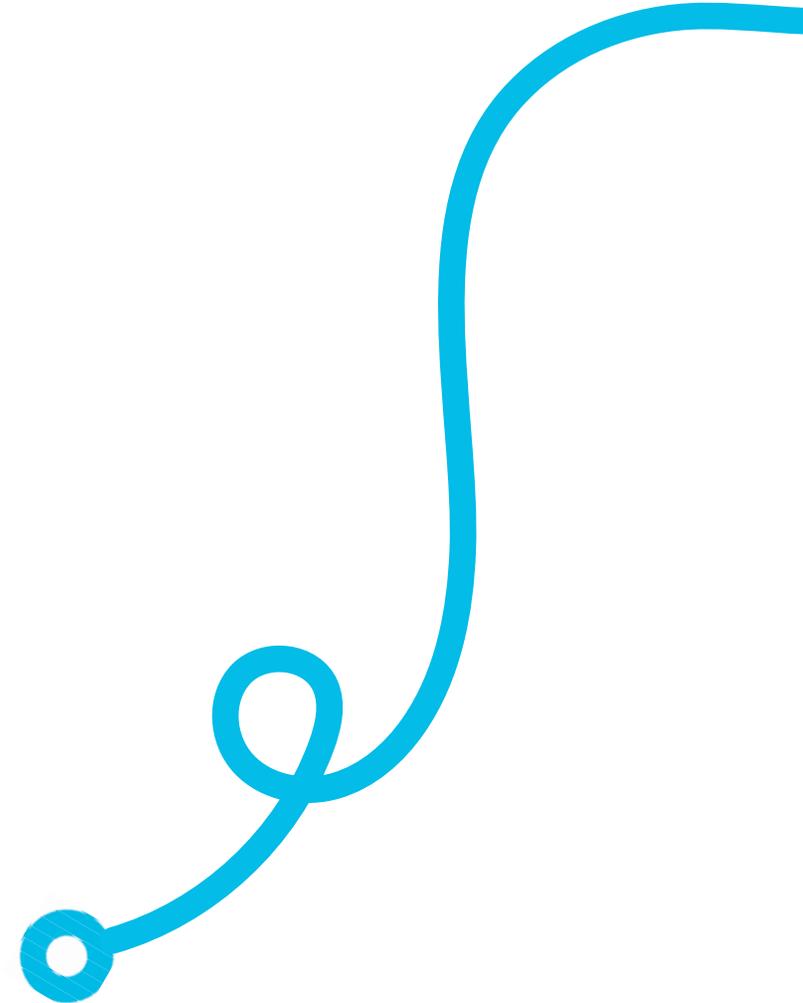
As a practitioner, it is crucial to have the trust of other practitioners in the community. Trust plays a huge role in driving business, and it's essential to keep good relationships with practices that refer you the most patients.

Intiveo's Two-Way Referral Management helps you gain insight and analytics on:

- Your best referring practices
- Which specific provider at each office sends which referrals
- Which procedures you receive the most referrals for
- How many of a practice's patients actually complete their treatment

This data can be used to improve the quality of your referrals and guide your practice into making better decisions such as:

- Accept or deny future referrals from the practice in question
- Provide constructive feedback



Intiveo's Take

At Intiveo, we consistently strive towards standardizing and simplifying the dental management process.

We saw a gap in the referral management market. We wanted to build a tool that can give administrative staff their time back to focus on the patient experience, improve practice communications, and the patient referral all in one go. And, perhaps most importantly, we wanted to give you full visibility on your referrals at every step.

The Referral Management solution is equipped with all the tools your practice needs to streamline the referral process and improve your communication with other practices.

We hope you found this guide helpful and we can't wait to see how you enjoy Intiveo's Two-Way Referral Management. We are so excited to work with you.

