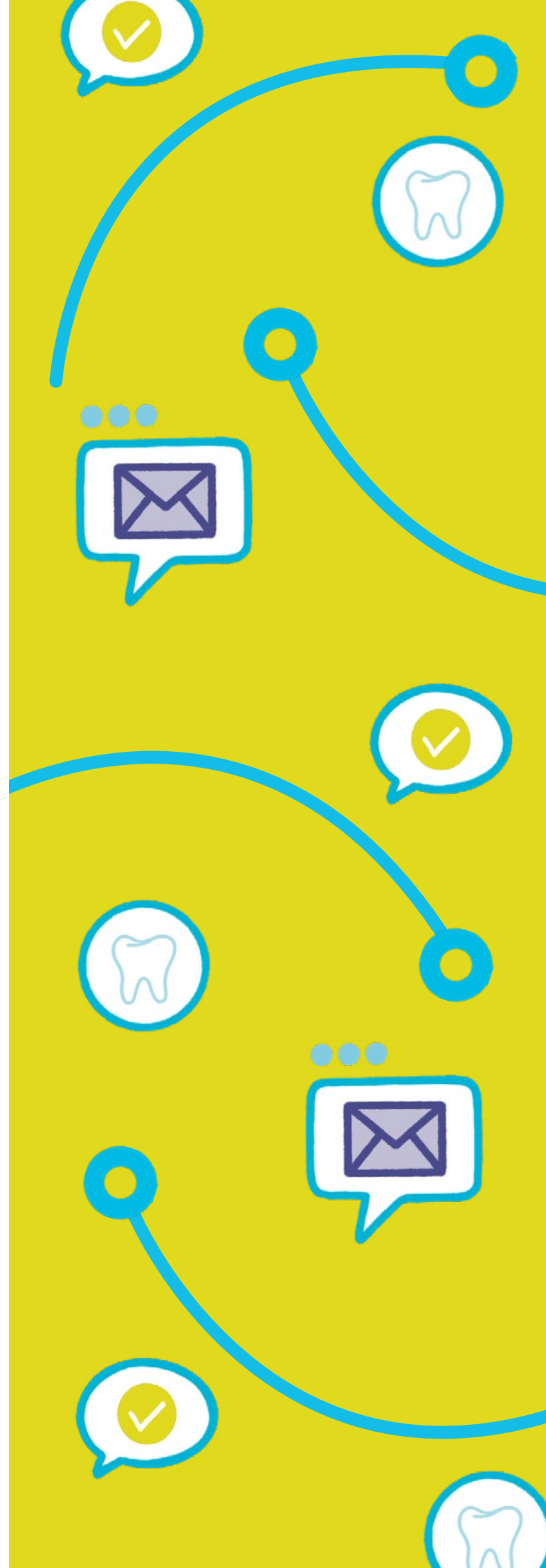


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14 Referral Messaging Templates for Your Dental Practice



Introduction


Successful patient engagement for your practice alone is one thing - but what happens when you add in referrals?

The importance of a good referral messaging cadence is essential for supporting your patient when you refer them out to a specialist. It not only supports the patient in a successful appointment outcome: you also build rapport with the specialist when your patient has been well-prepared by your practice.

It can be hard to know what information to include - or even what that sequence of messages should look like! That's why we created 14 messaging templates for email and text for an optimal referral sequence.



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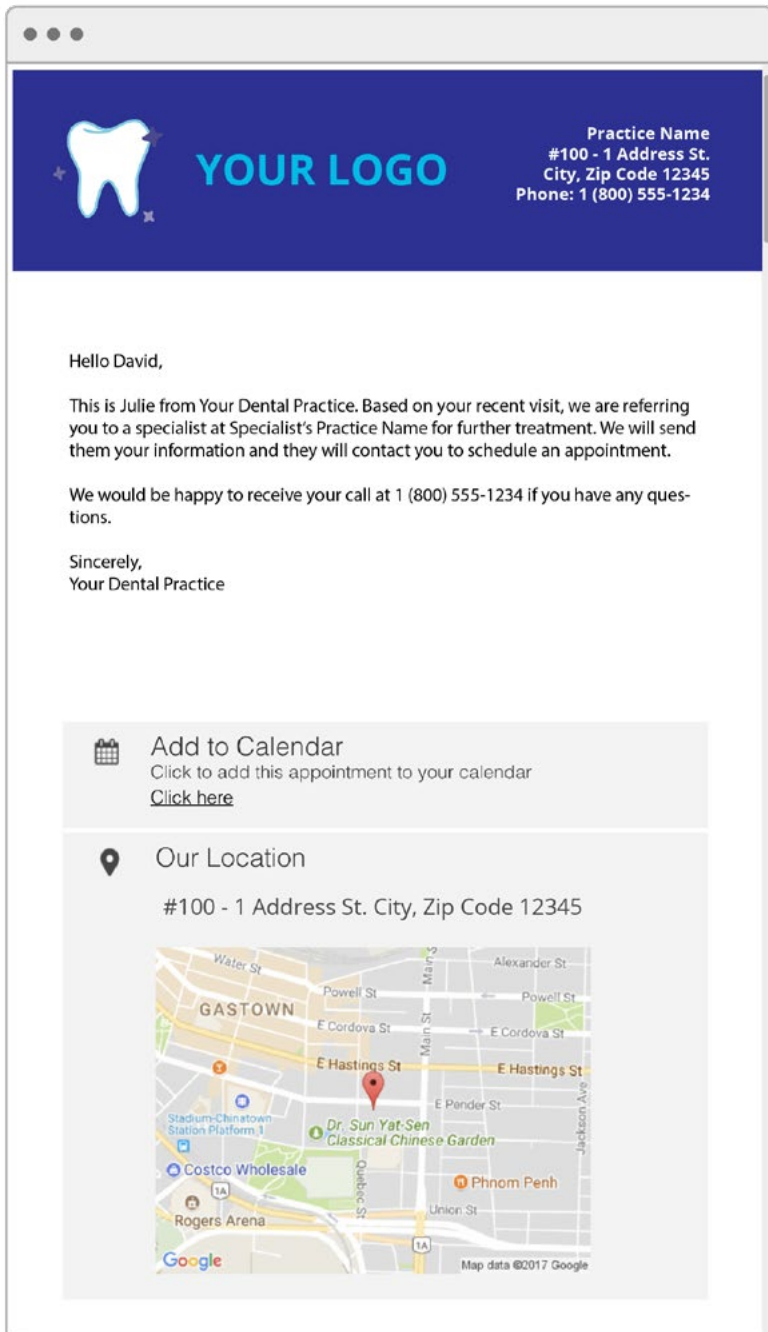


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The Dental Practice & Their Patient

When you are the dental practice who is sending your patient for the referral, communicating with them at each step is important. Not only do you need to provide them with all the information they need, it also shows your patient that you care - both of which enhance their experience as your patient.

REFERRAL NOTIFICATION FROM THE GP TO THE PATIENT - EMAIL



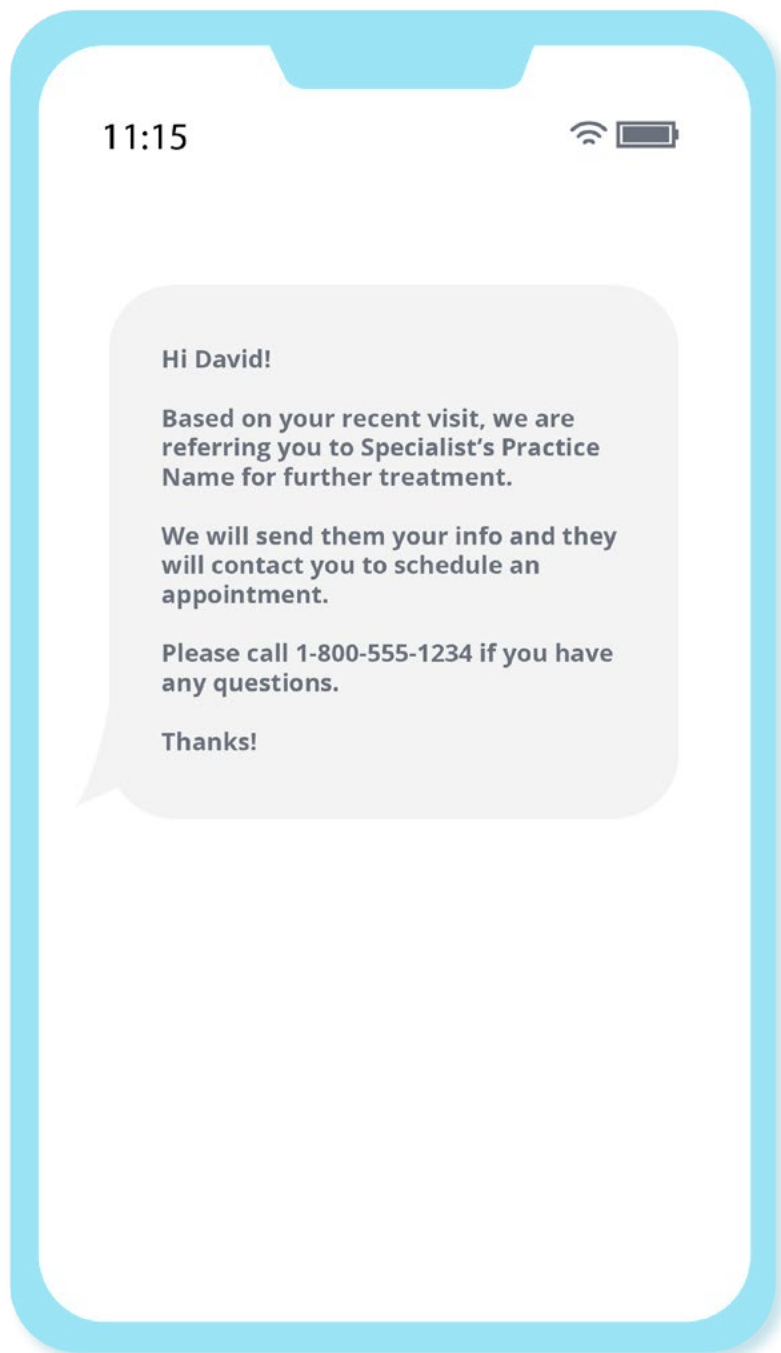
Include your patient's name.
Personalized messaging truly enhances the patient experience.

Identify yourself as well! Your patients get a lot of emails.

Always include the name of the specialist practice, so that they get familiar with it.

Remind them they can always ask questions.

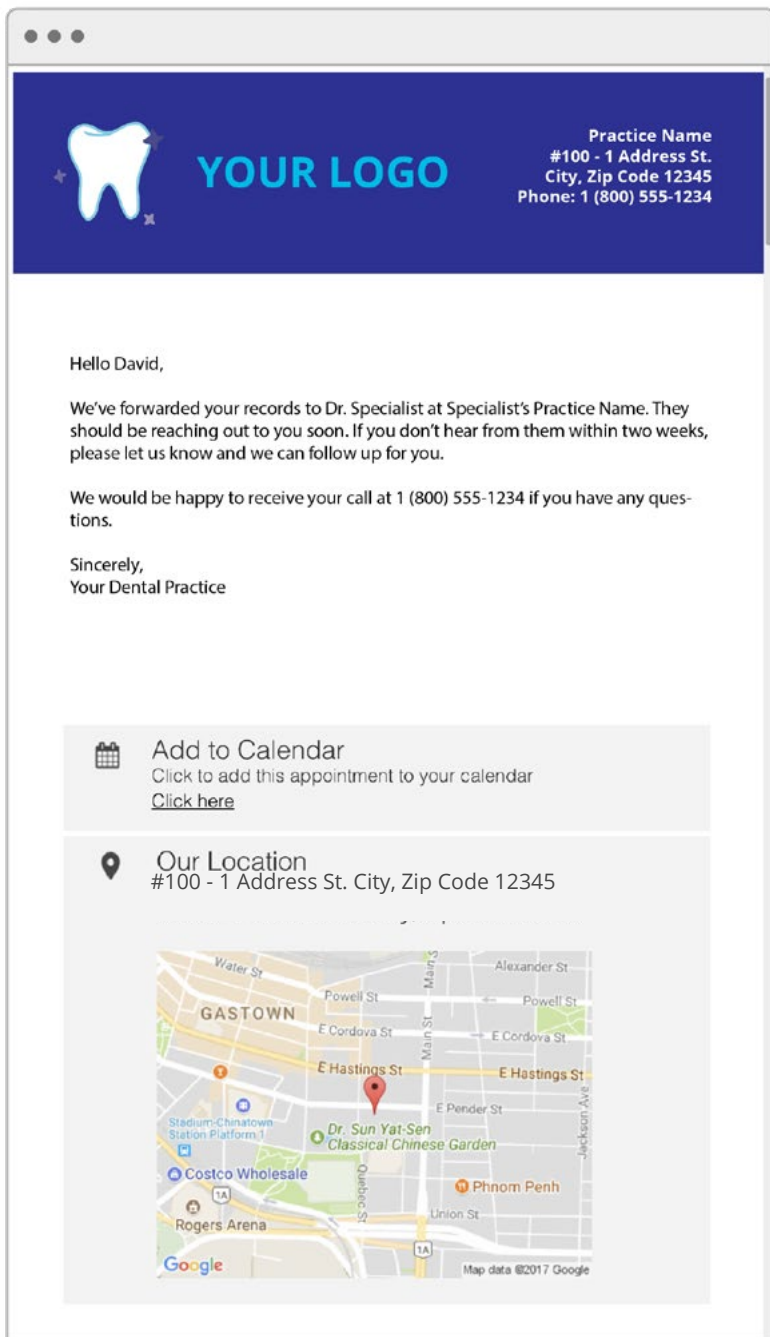
REFERRAL NOTIFICATION FROM THE GP TO THE PATIENT - TEXT



With texts, you have to be mindful of character limits, which are usually around 250 words. Keep it short, while relaying the necessary information.



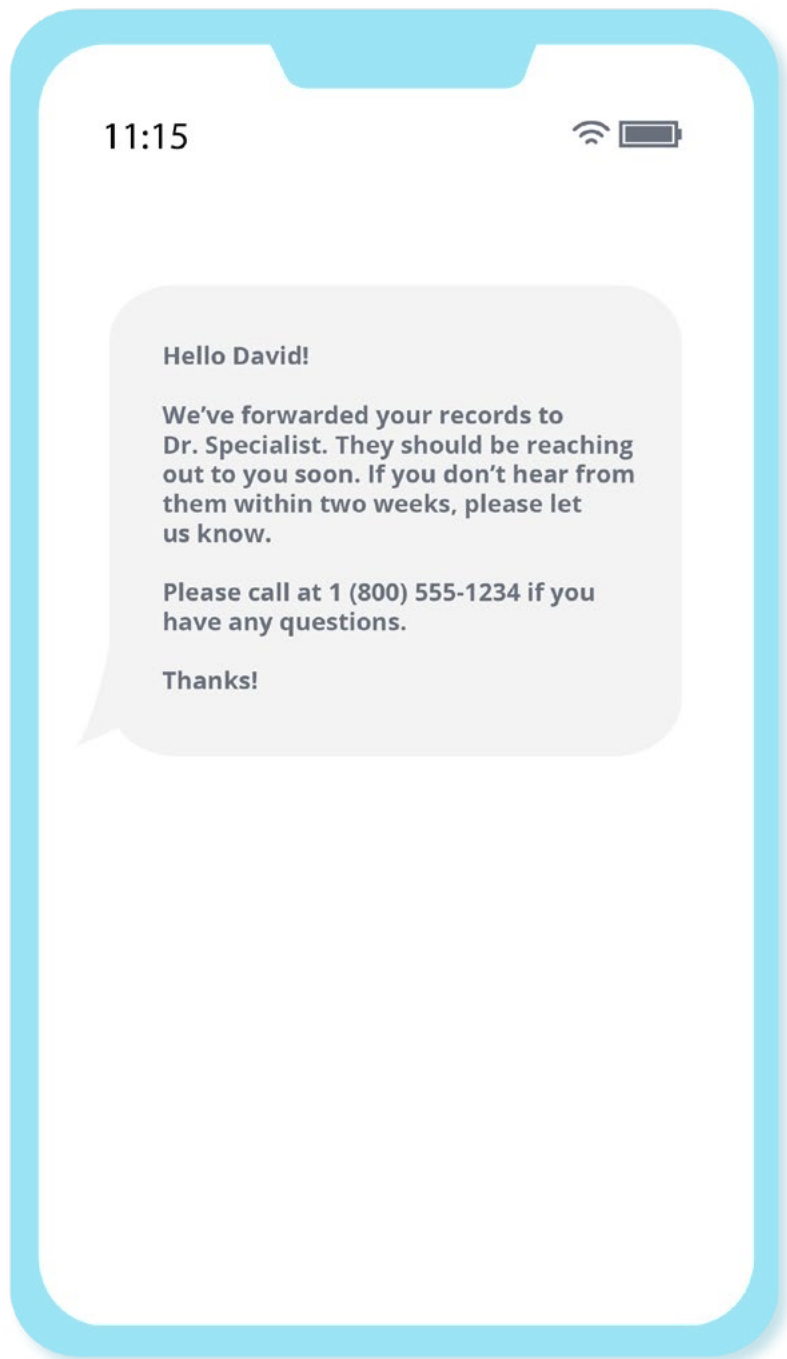
CONFIRMATION OF REFERRAL SENT - EMAIL



It's important to always include the specialist's name, even if you have communicated it before. Repeated information sticks better!

Provide a time-frame for when the specialist should reach out to the patient.

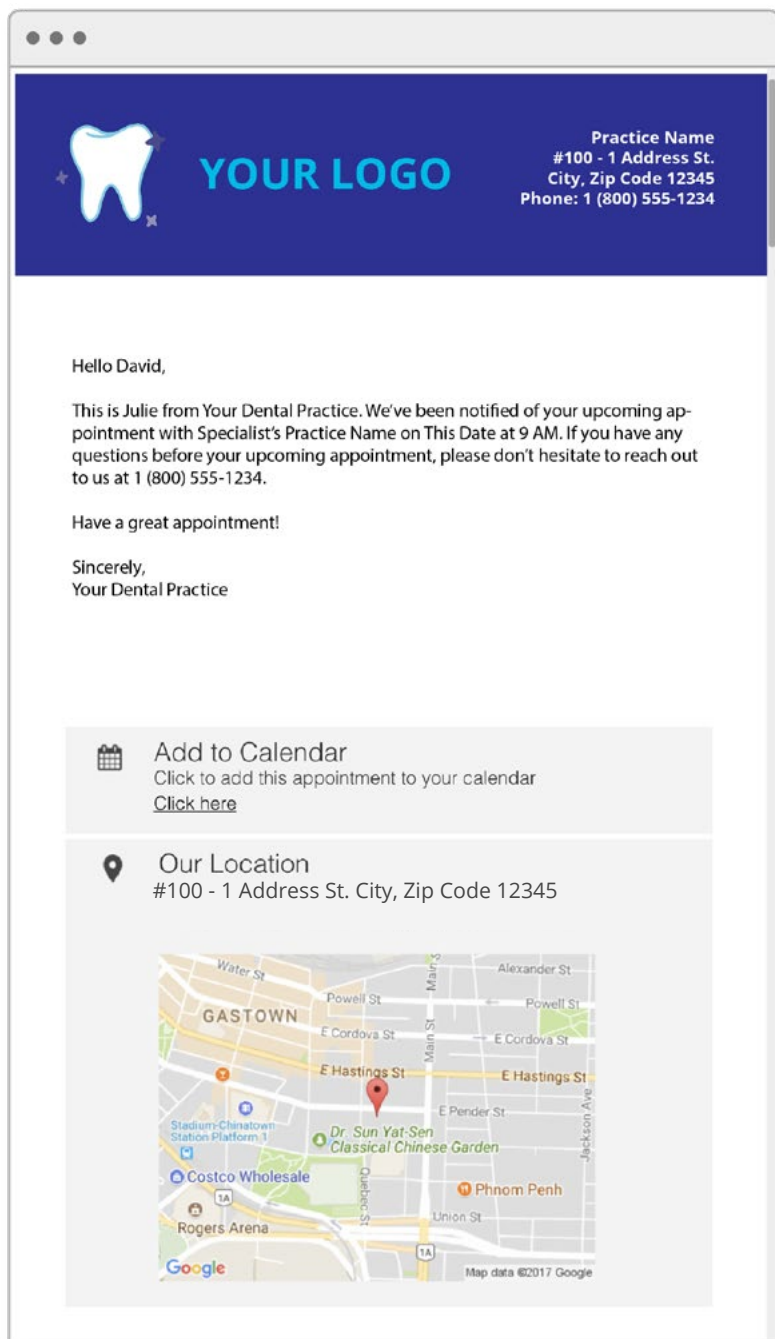
CONFIRMATION OF REFERRAL SENT - TEXT



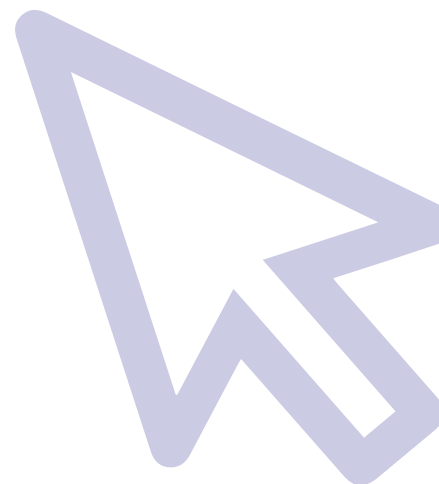
Keeping it short doesn't mean neglecting important information! Always remember to include the specialist's name.



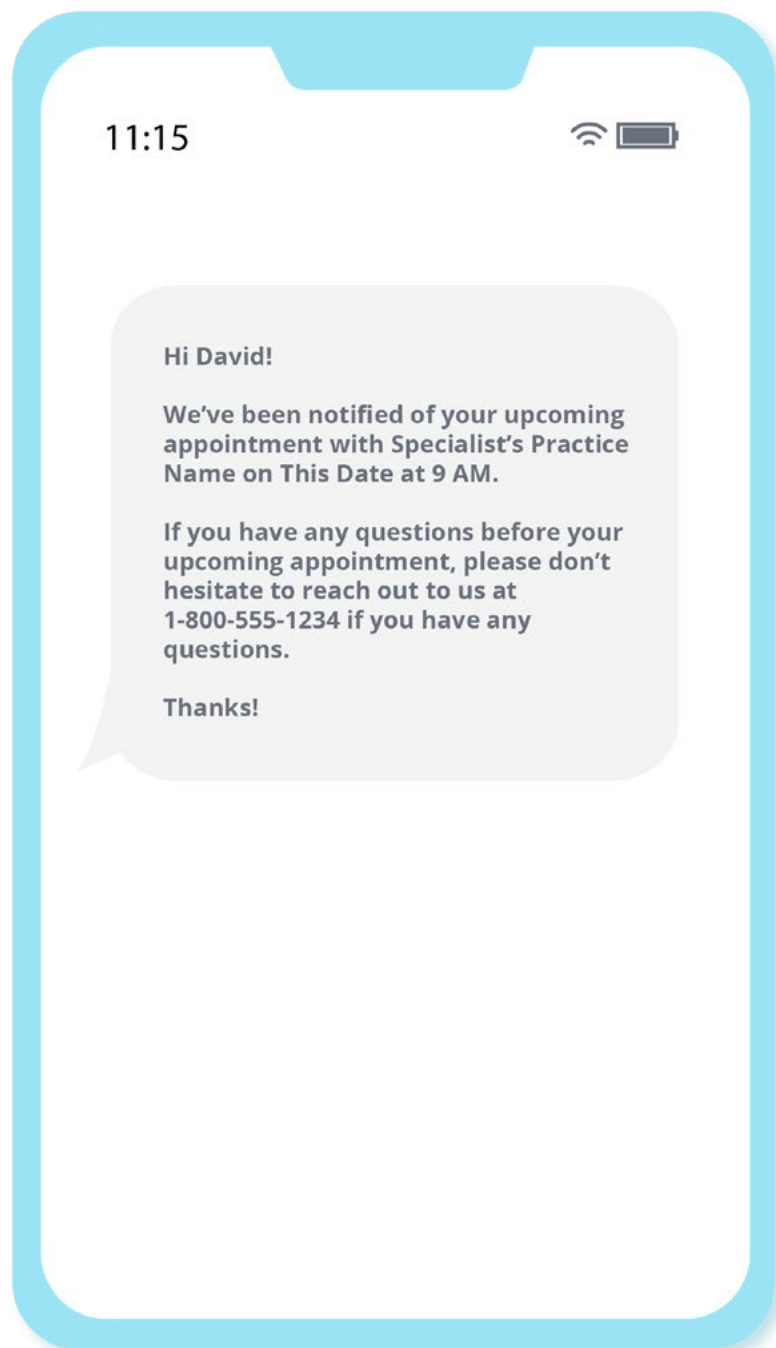
NOTIFICATION ABOUT APPOINTMENT- EMAIL



Show that you're up to date on your patient's progress - and that you're there to support them with reminders at every step of the way.



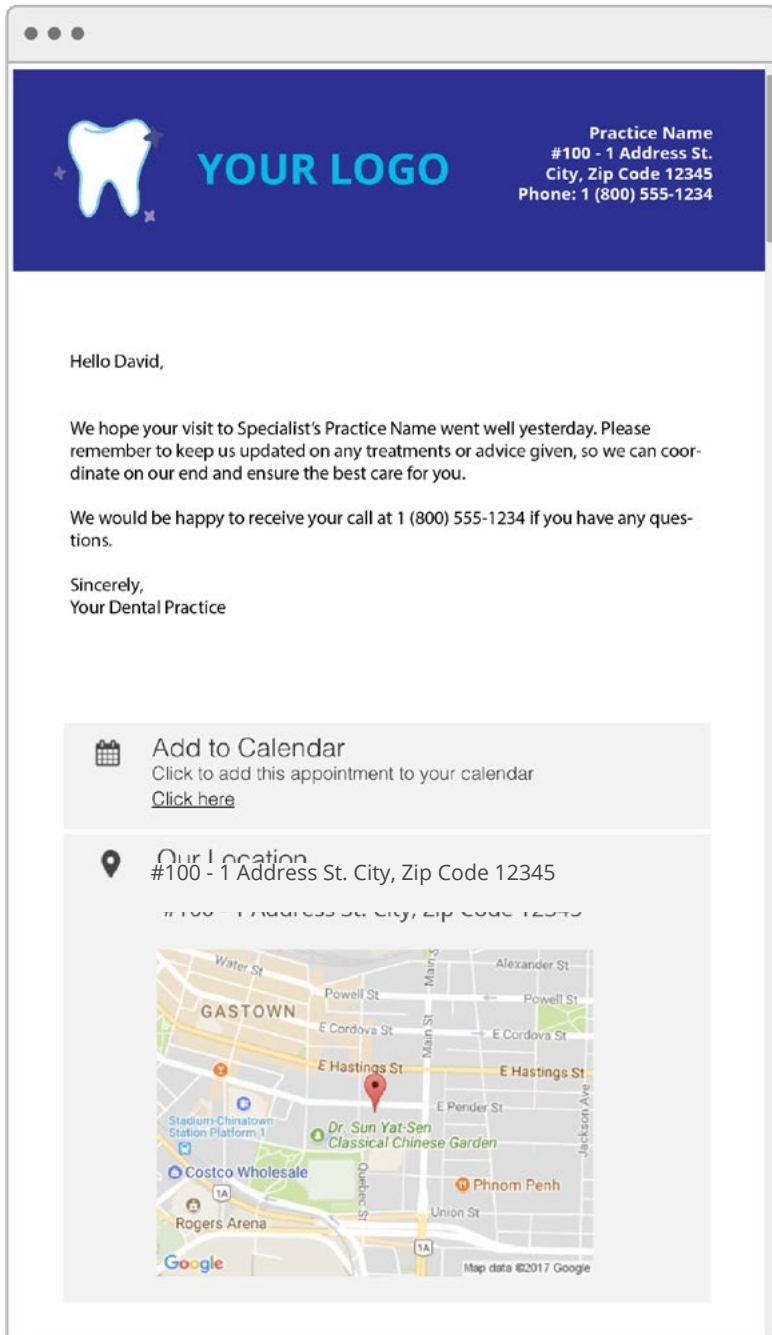
NOTIFICATION ABOUT APPOINTMENT -TEXT



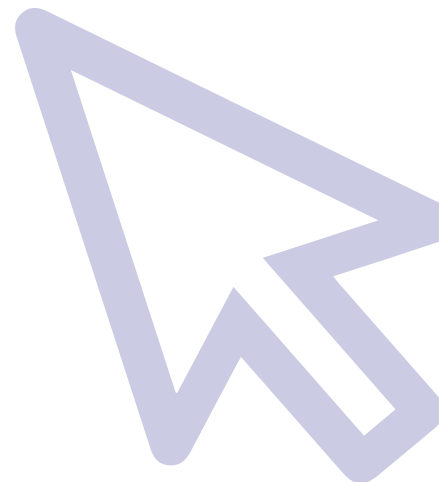
Include both the specialist's name and the date and time of the appointment in this text.



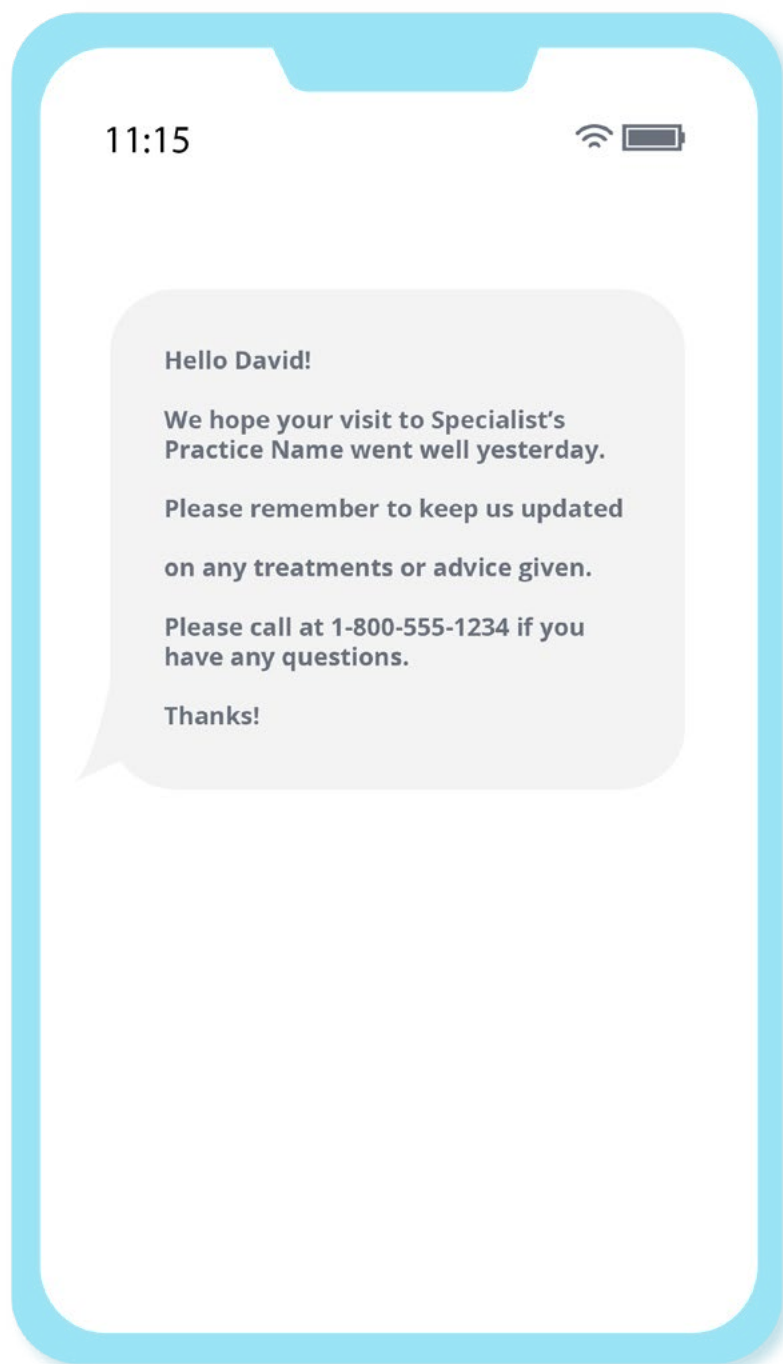
CHECK-IN AFTER REFERRAL- EMAIL



This message has two purposes. Your practice reminds them to share important information from their appointment - and also it serves a second purpose, to show your patient that you care about their experience.



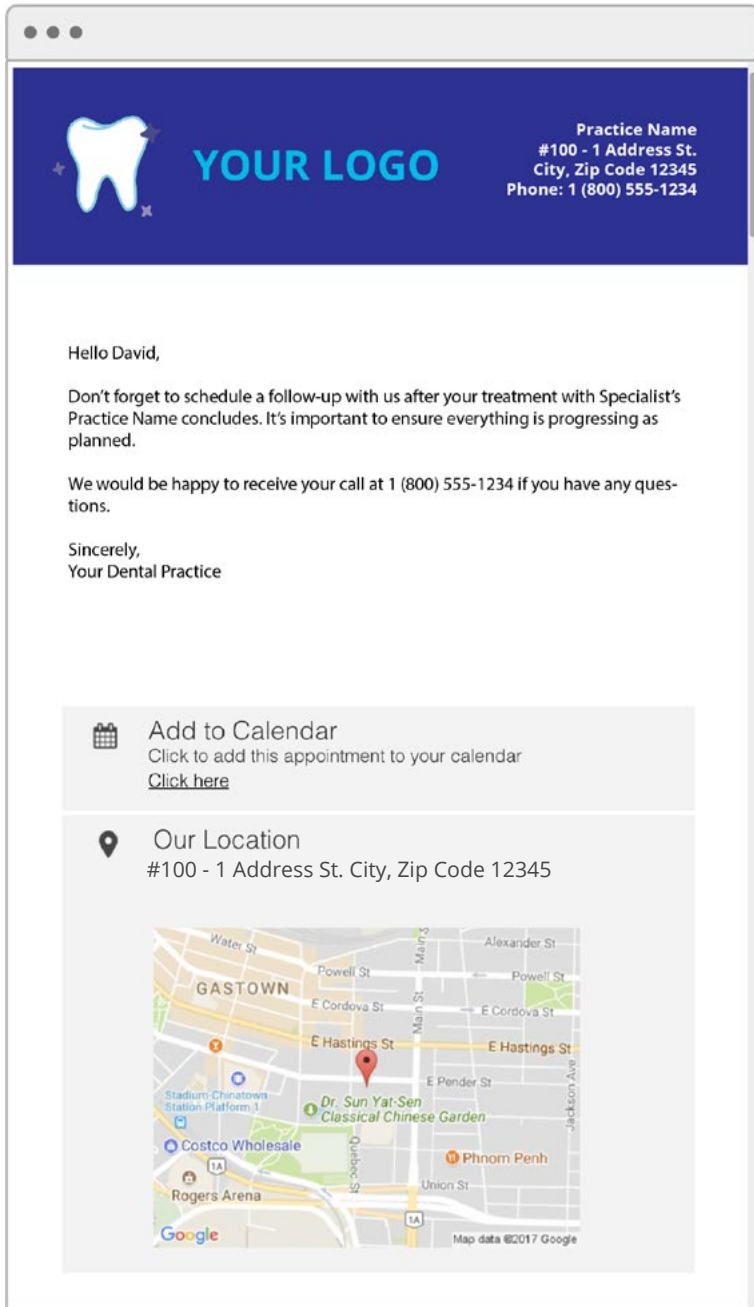
CHECK-IN AFTER REFERRAL -TEXT



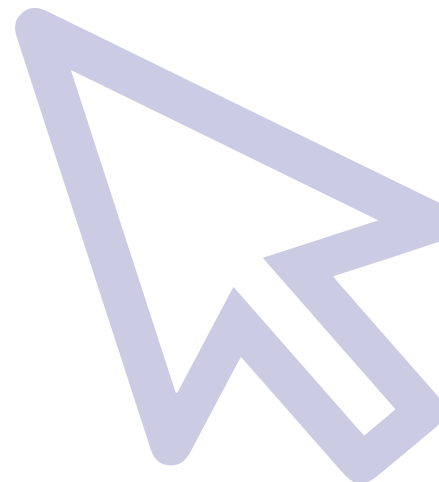
In both the text and the email, be sure to remind them why you're requesting this information. Remind them that their oral health care is a top priority for you.



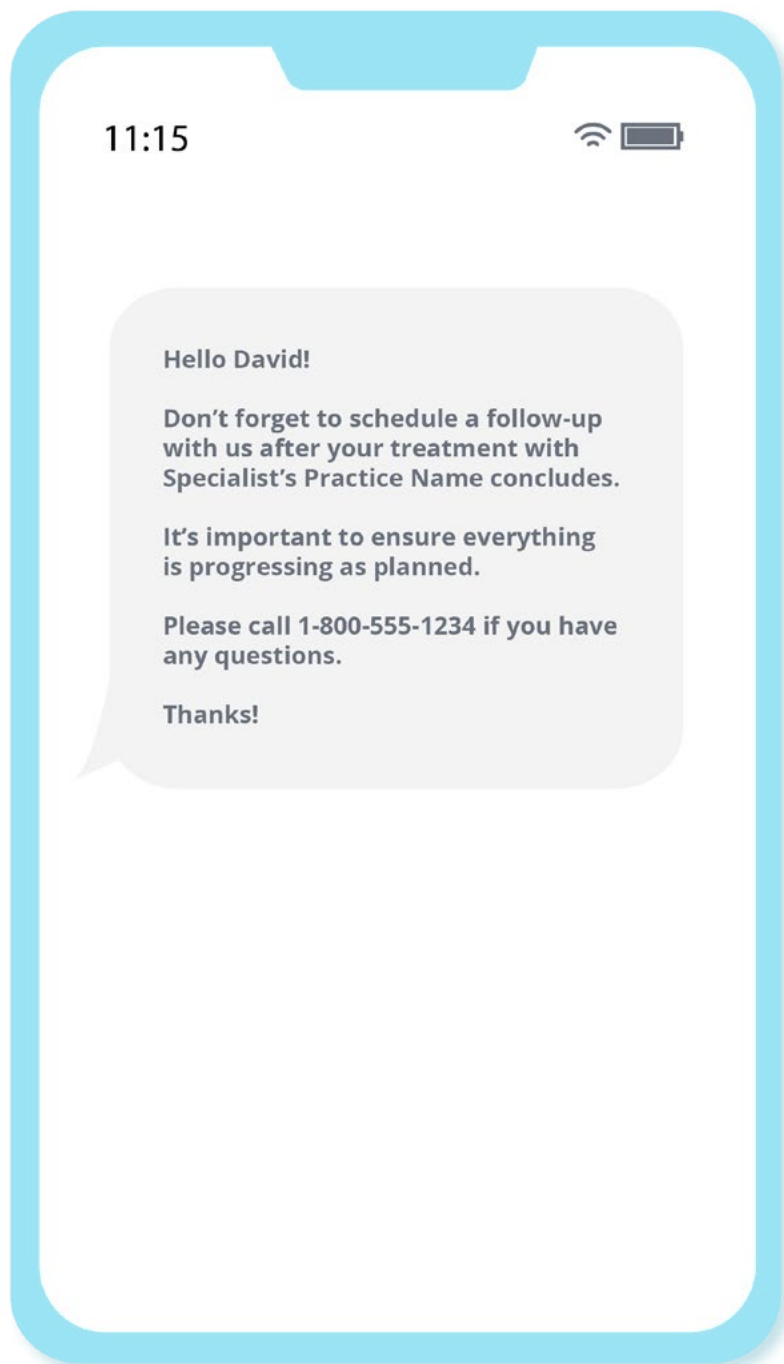
REMINDER FOR FOLLOW-UP CARE- EMAIL



And, remind your patient that they need to come back to see you! The treatment journey continues past the specialist appointment.



REMINDER FOR FOLLOW-UP CARE -TEXT



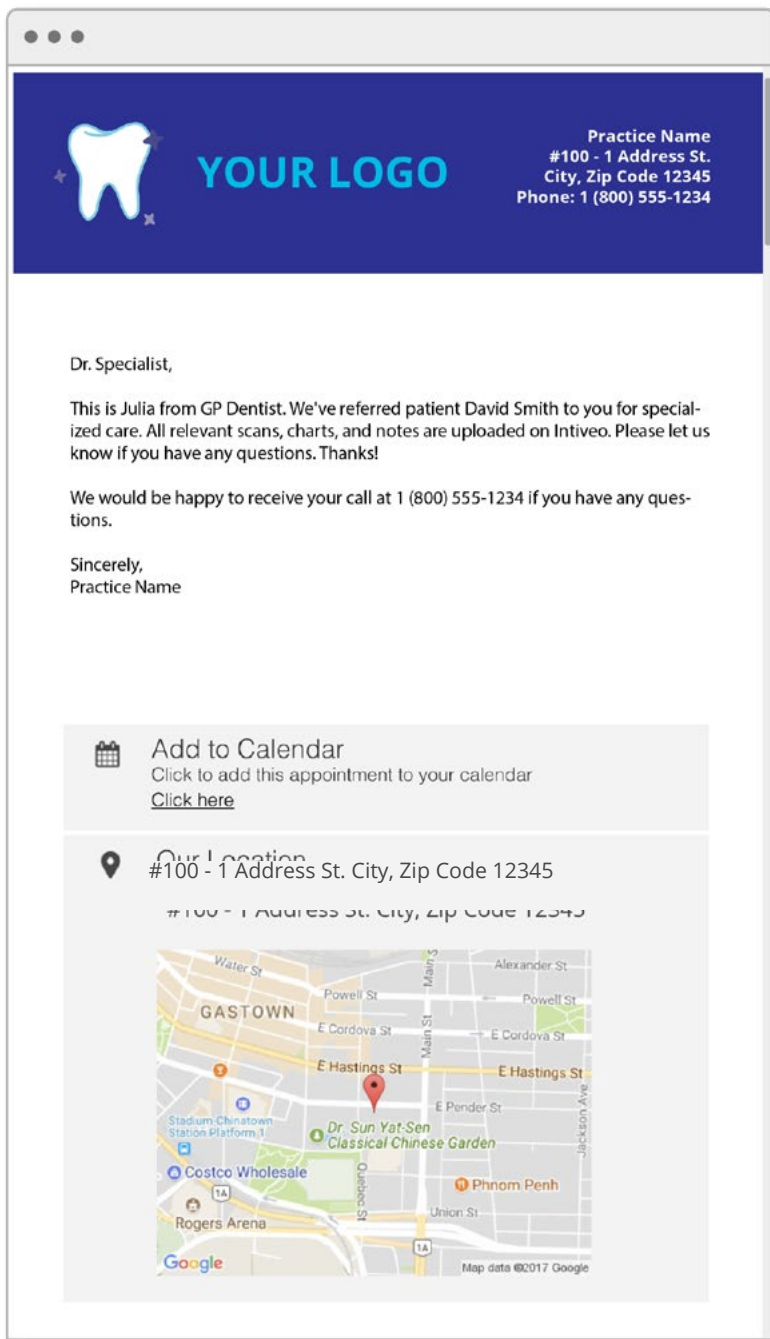
Remind them of the reason that they need the follow-up treatment!



The Dental Practice and the Specialist

To ensure the patient receives the best care possible, and has a positive experience, clear communication between the GP and the specialist is paramount. Regardless of whether you are the specialist or the GP, ensure that your messaging is informative, succinct, and is sent at each relevant touch point.

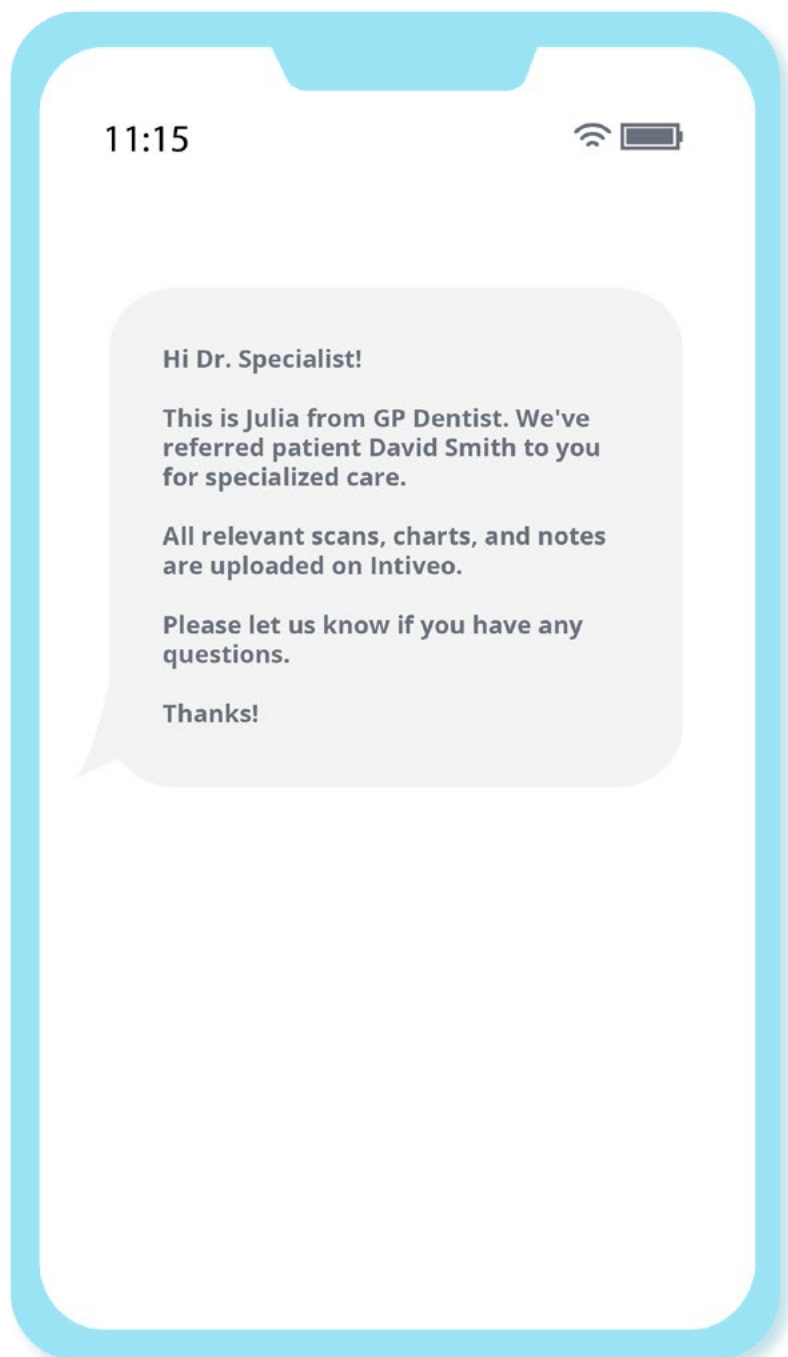
INITIAL REFERRAL NOTIFICATION - EMAIL



Always include the patient's name.

Inform the specialist of how they're getting important documents, whether they're being uploaded to your patient engagement software, sent hardcopy with the patient, or by another method.

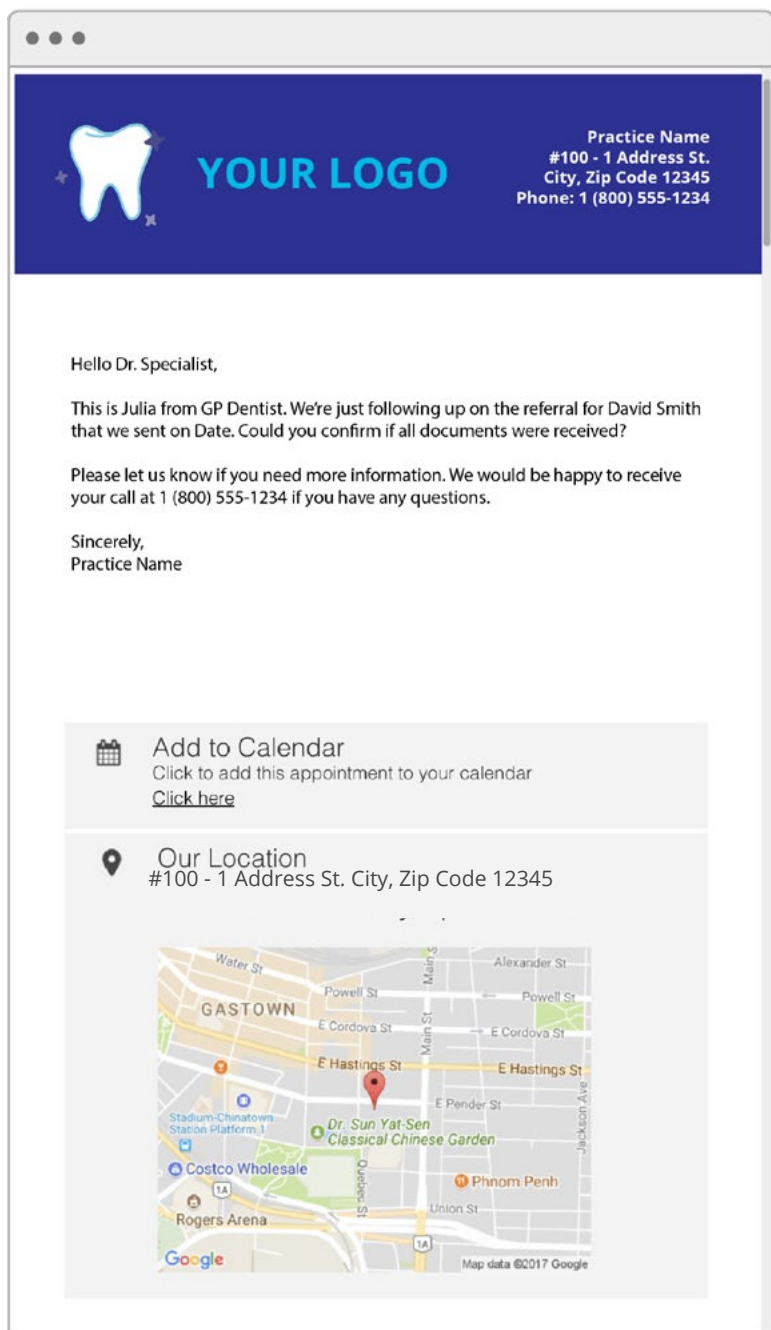
INITIAL REFERRAL NOTIFICATION - TEXT



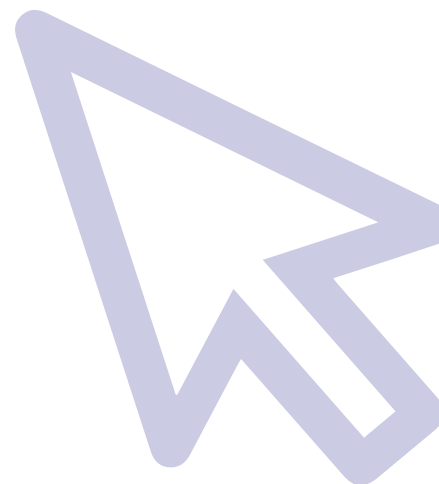
A text will not be appropriate in every professional relationship, but once a long-term rapport has been established, this is a choice that works for many practices.



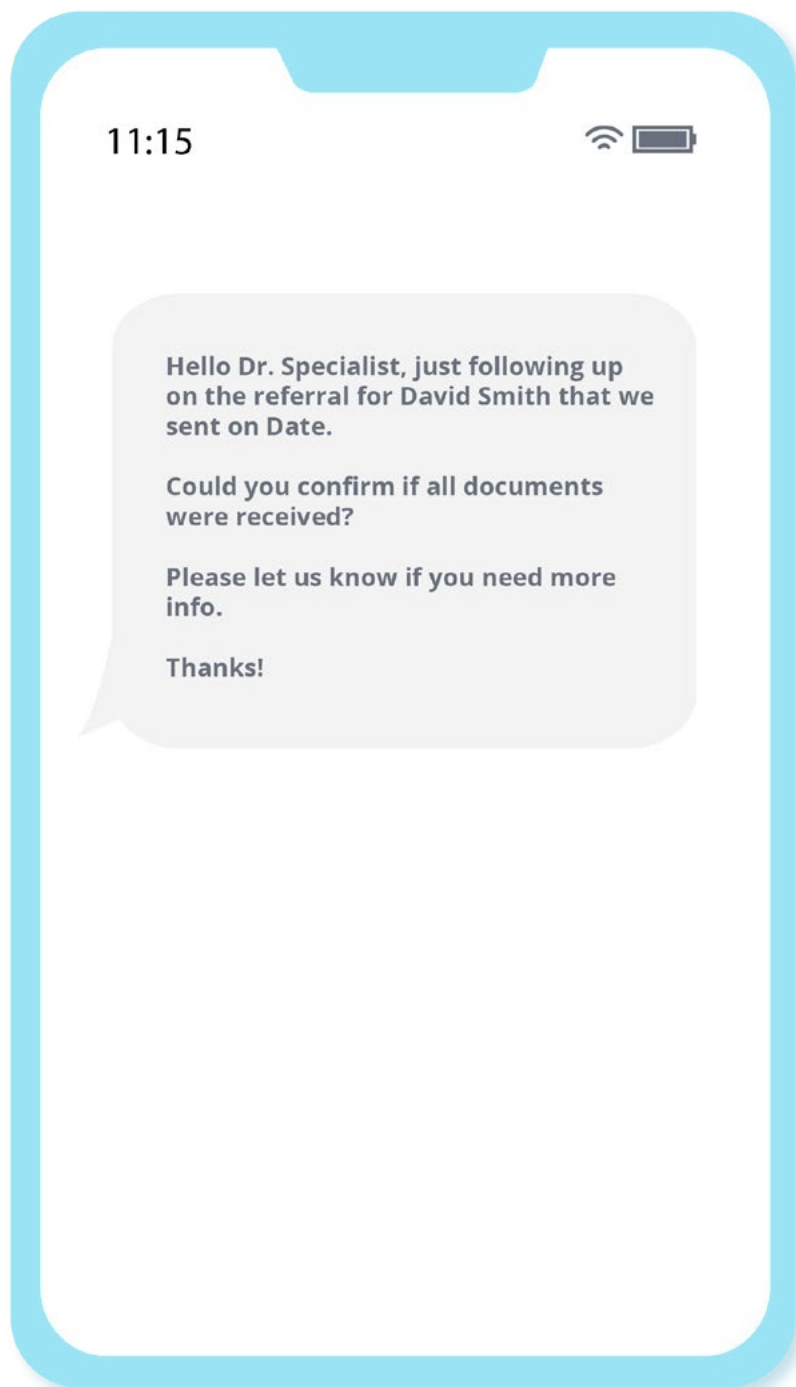
FOLLOW-UP - EMAIL



Confirm if the documents have been received. Many referrals are delayed because the information doesn't get to the specialist!



FOLLOW-UP - TEXT



Again, if you have a high level of familiarity with a specialist you refer to frequently, you can utilize faster, less formal ways of communicating.



Intiveo's Two-Way Referral Management Practice

Intiveo recently launched an innovative new way to manage referrals. Intiveo's Two-Way Referral Management gives your practice the tools to enhance how you connect with patients and specialists alike - and ensures continuity of patient care. Track patients' progress with ease, and send and receive patient referrals securely, all directly through your Intiveo software.

Curious to learn more?
Book a meeting today!

