



intiveo.

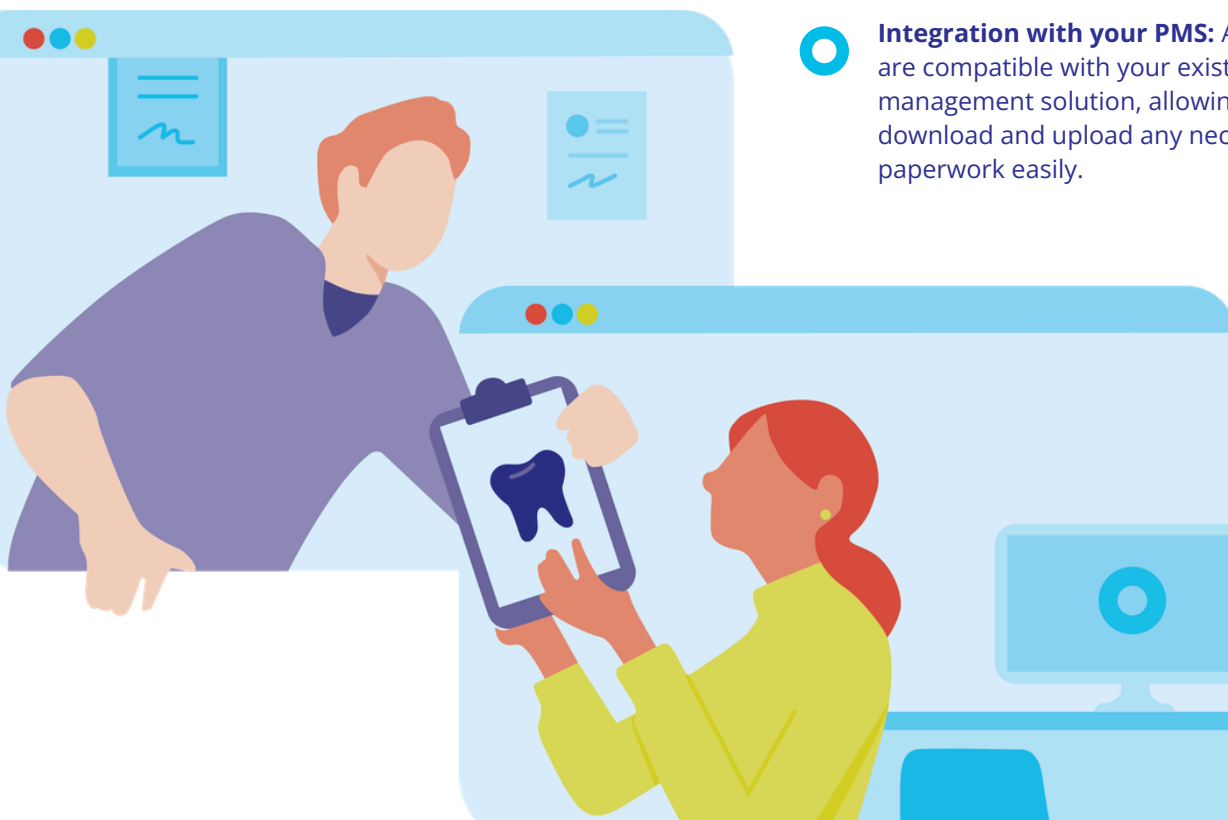
# Referral Management

Two-way referrals for general  
practitioners and specialists

# Seamless, Secure Dental Referrals

Manual referral processes introduce uncertainty at every stage, from submission to follow-up. Intiveo's Referral Management replaces that uncertainty with structure. By centralizing referrals into a trackable, two-way workflow, general practices gain confidence that patients complete their specialist care, while specialists gain real-time visibility into referral volume and more predictable revenue. The result is stronger care continuity and more reliable growth on both sides.

- **Two-way referrals:** Send and receive referrals with ease, all through the Intiveo platform. Whether it's sending patient information to a specialist or receiving incoming referrals, manage everything in one place.
- **Full patient tracking:** Track the patient's journey at every step, from initial referral all the way to completion of their treatment, ensuring full visibility and continuity of care.
- **Linked internal and external portal:** A user-friendly interface makes it simple to send and receive referrals, with every function integrated directly into your Intiveo software.
- **Security:** The Intiveo platform maintains full SOC 2 Type II, HIPAA & PIPEDA compliance.
- **Built-in communication tools:** Maintain clear and effective communication with both sending and receiving practices. Exchange notes, manage attachments, and stay updated on every patient's progress.
- **Integration with your PMS:** All documents are compatible with your existing patient management solution, allowing you to download and upload any necessary digital paperwork easily.



# How It Works

Sending and receiving referrals through Intiveo



## The referring office submits patient referrals through the portal.

*If the referring office isn't an Intiveo subscriber, they can create a free account in under 2 minutes to securely send referrals and track their status.*

## Referral status is updated in real time.

*Track referrals through five key stages from contact to treatment completion.*

## The office using Intiveo's Referral Management product invites its referring partners to a secure referral portal.

*You can also post the link to your portal on your website.*

## The receiving office is instantly notified and can begin processing the referral.

*Use the built-in two-way notes feature if you need to request additional files, etc.*

## Both offices can log in anytime.

*You can exchange notes, manage attachments, and stay updated on each patient's progress without leaving the platform.*

# Helping **14,000 providers** create tangible results



Before we had Intiveo we didn't have any competition in our area. We do now, and I feel like Intiveo gives us an edge because we're able to effectively communicate what's going on with the patient to the referring office...so it really has streamlined and improved the communication with referring offices. Even attitudes on the phone when they need to call for something; it's even brighter and happier because they're getting what they need.

- **Denise Davis**, Administrator Lead at Oral Surgery and Implant Specialists (OSIS)

OSIS streamlined

**4,000**

referrals

saved

**2 hrs**

per day

and achieved a

**94%**

treatment completion rate

**Want to learn more? Talk to one of our representatives today!**



[www.intiveo.com](http://www.intiveo.com)



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