Referrals are an essential part of a dental practice.

– New patients are referred into a practice from a variety of places
– Patients are referred out of a practice to see other providers for specialized care

Eaglesoft can track these continual referral cycles and use referral productivity figures to determine top sources and the effectiveness of advertising and marketing efforts.

**Referral Sources** are people, advertisements or other methods that bring new patients into the practice.

*To access, go to List | Referrals | Sources and select new.*

The patient and provider/staff sources populate automatically as existing patients and staff members are assigned as referral sources for new patients.

**Referral Recipients** are specialists the practice sends patients to on a regular basis. This feature enables the practice to manage, create and edit referral recipients.

*To access, go to List | Referrals | Recipients and select new.*
**Referral Tracking**: tracking how patients were referred in or referred out of the practice is completed in the edit patient window.

*To record the referral information, select the “Referrals” button.*

The Patient Referral window tracks three areas for the patient.

1. How the patient was referred in to the practice.
2. List of patients this individual has referred in to the practice.
3. Any current and previous occasions when this patient has been referred out to another specialist.
Alternates Recall
Select the ‘Alternates Recall’ checkbox for patients who will alternate visits between a specialist and their general dentist.

Referral Letters:
An office may wish to send a letter to a referral source or recipient to thank them for the referral or to pass along information regarding a shared patient. These letters can be generated to merge in patient-specific information.

Referral Reports:
Referral reports are available to track referral activity and identify existing patients to assist with marketing the practice.
- Referred Patients Report
- Patient by Other Referral Sources
- Referral Productivity Detailed Report
- Referral Productivity Summary Report
- Top Referral Sources Report
- Patient Master Report
- Patient Analysis Report

Referral Marketing:
Marketing tools exist within the software by sending letters to VIP patients or by simply adding incentives to messages. i.e. refer a patient and receive $25 off your next visit.
The practice can also automate marketing efforts through RevenueWell.

RevenueWell’s Referral Manager helps you get more patient referrals with ready-to-send referral campaigns, configurable referral incentives and invitations to submit a referral at every patient interaction. Truth is, your patients WANT to share their good experience with their friends and colleagues: you just have to make it easy, convenient and rewarding.

Website: patterson.revenuewell.com

Phone: 1-800-294-8504

Additional Resources:

FAQ 53 – How to Set Up or Edit a Referral Recipient
FAQ 54 – How to Use a Referral Recipient For a Patient
FAQ 160 – Referral Sources – How to Track How Patients Hear About Your Office
FAQ 337 – How to Send Letters to Referral Sources in Eaglesoft
FAQ 11243 – How to Send Letters to Referral Recipients
FAQ 16815 – How to Create a Referral Recipient – Interactive Tutorial
FAQ 15352 – Eaglesoft ‘Practice with the Masters’ Interactive Tutorial – Build Your Referral Program