Referrals are an integral part of a dental practice.

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

Offices can utilize EagleSoft to keep track of these continual referral cycles and use referral productivity figures to determine top sources and the effectiveness of advertising and marketing efforts.
Referral Tracking

Referral Sources

The Referral Sources List (accessible from Lists | Referrals | Sources) is broken down to display patients, staff members and ‘other’ sources that resulted in new patients for your practice

– The patient and provider/staff source lists populate automatically as referrals are made

– The ‘Other Sources’ list is customizable, and might include:
  • Dental or medical providers in the area
  • Neighboring businesses
  • Advertising sources (yellow pages, newspaper, radio, etc.)
  • Marketing sources (mass mailings, fliers, coupons, etc.)

Referral Recipients

The Referral Recipients List (accessible from Lists | Referrals | Recipients) displays other providers to whom you refer patients for additional treatment
Referral Tracking

Entering Patient Referral Information

When a patient is referred into or out of your practice, specify the referral information by selecting the ‘Referrals’ button from the Edit Patient window.

**Referred In Information...**
- Specify how a patient learned about your practice
  - Select the ‘Alternates Recall’ box for patients who will alternate recare visits between a specialist and the general dentist.

**Referred Out Information...**
- Specify information regarding a patient being referred out for additional treatment.

*Note: Use the buttons in this area to generate letters, envelopes or mailing labels addressed to the applicable referral source or recipient.*
Referral Tracking

Referral Reports
EagleSoft includes 14 reports to help track your practice’s referral statistics. These reports are accessible from the ‘Referrals’ section of the Reports list.

Referral Reports include:

- **Patient Notes by Other Referral Source**
  - Displays notes from a selected date range for patients referred by an ‘other’ source
  - Filterable by date range, patient, service, referral source, user, note format, note type or note status

- **Patients by Other Referral Source**
  - Displays a list of patients referred by an ‘other’ source
  - Filterable by referral source, next recall date and patients marked to receive and/or not receive recalls
– Patients Currently Referred Out
  • Displays a list of patients that are currently referred out
  • Filterable by date range, based on the date they were referred
  • Output Options from this report include:
    – Printing the report
    – Sending letter to Referral Recipients
    – Add patients to InContact
    – Send Referral Recipients to SmartDoc as a batch

– Referral Productivity Summary
  • Displays referral productivity by source
  • Filterable by date range and first visit date
Referral Tracking

Referral Reports (cont’d)

– Referral Productivity Detailed
  • Displays patients that have been referred to the practice by each referral source, including first visit date and productivity details for each patient
  • Filterable by date range and first visit date
    – Note: The patients displayed and their production amounts are based on the range of dates specified in the filter

– Referral Productivity Yearly Summary
  • Displays referral productivity by source for the current and previous year

– Referral Recipient & Source Labels

– Referral Recipient & Source Laser Labels
  • Both reports display mailing labels for all referral sources and recipients
Referral Tracking

Referral Reports (cont’d)

– Referral Recipient & Source Master
  • Displays a master list of all referral sources and recipients

– Referral Recipients Master
  • Displays a master list of all referral recipients

– Referral Sources Master
  • Displays a master list of all referral sources, including patients, providers and ‘other’ sources

– Referred Patients
  • Displays a list of all patients who have been referred to the practice, grouped by referral source
Referral Tracking

Referral Reports (cont’d)

– Service History by Other Referral Source
  • *Displays patient recall dates during the selected range of dates based on service activity*
  • *Filterable by service, referral source, date range and provider, as well as whether or not fees will be displayed*

– Top Referral Sources
  • *Displays referral sources ranked by the number of patients referred based on a range of months*
  • *Filterable by date range (past months only)*