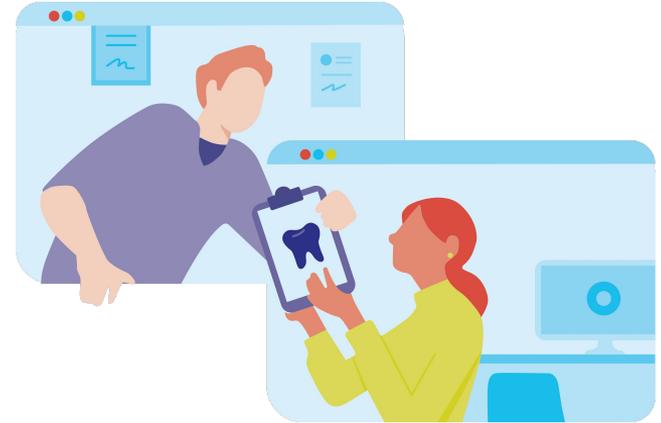


The Referral Process from the Perspective of a Referring Office

Intiveo's Referral Management tool offers a streamlined process for referring offices to send patient referrals. This guide provides a step-by-step walkthrough of what the referral process looks like from their perspective.



Steps for Referring Offices Using Referral Management:

Login/Sign Up Process:

- Visit the referral page of the Intiveo client you're referring to.
- Access the link either via an email invitation or from their website.
- Enter your office email and main phone number.
 - New Users will need to verify their email. Check your inbox for a verification email, and click the link within 60 seconds.
 - Existing* Intiveo users should log in with their credentials.

admin.demo.intiveo.com/referrals/intiveo-specialty-dental/login

Referrals to Intiveo Specialty Dental
Please enter your details to access your account.

Office Email
Enter your office email address

Office Phone Number
(000) 000-0000

I'm not a robot

Next

Powered by **Intiveo**
Patient communication software. [Learn More](#)

**If your office uses Intiveo for your appointment reminders, when you sign up to send referrals to another Intiveo user, you'll be directed to log in with your Intiveo user.*

Steps for Referring Offices Using Referral Management:

Entering Office Information:

- After email verification, fill in your office information on the user registration page.
- This information will be attached to your referrals.

Sign up to send referrals to Intiveo Specialty Dental

Office Profile

Please enter your office details.

*Office Name

Smile Dental Clinic

*Office Email

rebecca.c+2024@intiveo.com

*Main Office Phone Number

(000) 000-0000

*Address

123 Main Street

*City

Vancouver

Country ?

Canada

*State/Province

State/Province

*Zip/Postal Code

000-000



Steps for Referring Offices Using Referral Management:

Setting Up Providers:

- Specify the providers from your office who will be sending referrals.
- Customize provider names for clear identification in referrals.

*Providers

Dr Strange

+ Add Provider

Dr Suess ✕

Dr Dre ✕

Preferred Tooth Notation

- Select preferred Tooth Notation

*Preferred Tooth Notation

FDI Notation (ISO 3950)

FDI Notation (ISO 3950)

Universal Numbering System

Palmer Notation



Steps for Referring Offices Using Referral Management:

Creating a Password:

- Create a secure password that meets the specified requirements.

*Create Password

- ✘ Contains lowercase letters
- ✘ Contains uppercase letters
- ✘ Does not contain username

*Confirm Password

- ✘ Contains numbers
- ✘ At least 8 characters long

Language Preference

- English
- French

*I agree to the terms of use.

[View terms of use.](#)

Agreeing to Terms of Use:

- Read and agree to the terms of use, which are compliant with HIPAA and PIPEDA standards.



Steps for Referring Offices Using Referral Management:

Completing Submission and User Creation:

- Submit all required information to create your user account.
- Incomplete or incorrect fields will be highlighted for correction.



*Existing Users Referring to a New Office:

- Log in with existing credentials to refer to additional offices.
- Use the same email and password for seamless integration.



Beginning the Referral Process:

Sending Referrals:

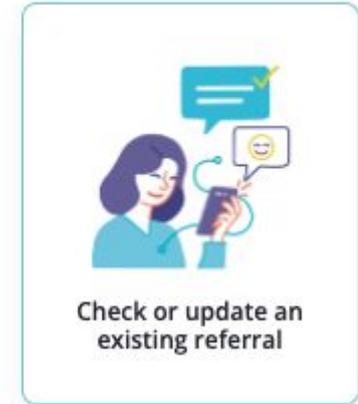
- Log in to the referral portal.
- Click “Refer a new Patient” and complete the referral form.

*Existing Intiveo Users

- Sign into your Intiveo dashboard
- Navigate to Referrals > Outgoing Referrals
- Refer a Patient to submit a referral.

There is no additional cost to send referrals.

What would you like to do?



Steps for Referring Offices Using Referral Management:

Sending Referrals:

- If applicable select the clinic you wish to send the referral too
- Enter the patients details to complete the Referral Form

Referral Clinic

To start a new referral, select where you want to refer your patient.

[I don't see the office I want to refer to.](#)

Referral Form

Please complete your patients referral form.

Patient Details

*First Name

*Last Name

*Date of Birth

*Is this patient a minor?

- Yes
 No

*Does the patient require antibiotics prior to dental treatment?

- Yes
 No

Contact Details

Email

Mobile Phone

Home Phone

Work Phone

*Contact patient?

- Please contact patient
 Patient will call



Steps for Referring Offices Using Referral Management:

Sending Referrals:

- Enter the Referral Details
 - Referring Provider
 - Requested Provider
 - Procedure
- Add any applicable case notes
- Select the appropriate teeth from the Tooth Chart provided (*The receiving office will see the corresponding tooth chart with their preferred labels, converted automatically*)

Referral Details

*Referring Provider

Requested Provider

*Procedure

*Case Notes
Write your note here...

You will be able to upload files on the next page.

Tooth Chart: FDI Notation (ISO 3950)

18 17 16 15 14 13 12 11 21 22 23 24 25 26 27 28
Right Left

48 47 46 45 44 43 42 41 31 32 33 34 35 36 37 38
Right Left

55 54 53 52 51 61 62 63 64 65
Right Left

85 84 83 82 81 71 72 73 74 75
Right Left

I have obtained consent to send this patient's personal information for referrals, either through my office's privacy policy or for this specific referral.



Steps for Referring Offices Using Referral Management:

Sending Referrals:

- Upload any files you wish to attach to your referral form or submit without files
 - Maximum file size is 50MB
 - Allowed file formats include .pdf, .bmp, .DCM, .DICOM, .gif, .jpg, .jpeg, .png, .stl, .tif or .tiff
 - Maximum 10 files associated with each of your referrals at any given time.

Upload Files

Upload any files that you wish to attach to your referral form.



Maximum file size is 50MB

Allowed file formats include .pdf, .bmp, .DCM, .DICOM, .gif, .jpg, .jpeg, .png, .stl, .tif or .tiff



Steps for Referring Offices Using Referral Management:

Checking on Existing Referrals:

- Log in to the portal and select “Check or update an existing referral”.
- Click on a patient’s name to view their referral status and details.

What would you like to do?



Refer a new patient



Check or update an existing referral

Steps for Referring Offices Using Referral Management:

Checking on Existing Referrals:

- Click on a patient's name to view their referral status and details.

Existing Referrals

Referrals that have been submitted to Intiveo OMS.

Search Patient

Treatment Type Office Name Referral Status Submission Date

Patient Name ^	View Details	Treatment Type ↕	Status ↕	Last Update ↕	Submission Date ↕	Office Name ↕
Alex Sauvage	View	Crown	Contacted	Feb 12, 2024	Feb 12, 2024	Intiveo Specialty Dental
Amélie Boulay	View	IV Sedation	Completed	Feb 12, 2024	Feb 09, 2024	Intiveo Specialty Dental
Claude Vasseur	View	All-on-Four Implant	New	Feb 12, 2024	Feb 10, 2024	Intiveo Specialty Dental
Gilbert Marin	View	Apicoectomy	Booked	Feb 12, 2024	Feb 09, 2024	Intiveo Specialty Dental
Grégoire Jourdan	View	Apicoectomy	New	Feb 12, 2024	Feb 11, 2024	Intiveo Specialty Dental



Steps for Referring Offices Using Referral Management:

Checking on Existing Referrals:

- View referral stages and updates
- Add notes, upload patient files, or download a PDF

< Back to Existing Referrals

Olivia Sauvage
Referred patient details.

Add Note Patient Files Download PDF

✓ Referred ... ✓ Contacted ... ✓ Appointment Booked ... 4 Appointment Completed

Patient Details
📞 (555) 975-1219 (Mobile) ✉️ thomas94@example.net

Referral Updates

Date	Note	Edit	Delete
Feb 12, 2024	Appointment booked for 2023-08-25	-	-
Feb 12, 2024	Status updated to Appointment Completed	-	-

This efficient referral management process within Intiveo ensures that referring offices can easily and securely manage their patient referrals, enhancing collaboration and patient care between dental practices.



Steps for Referring Offices Using Referral Management:

Checking on Existing Referrals:

- Notes can be added by both the sending and receiving practices
- Notes will appear in the updates section
- New notes from the other office will display a "new" badge

← Back to Existing Referrals

Donald Duck
Referral ID: 2232121

Add Note Patient Files Download PDF

Referred Attempting to Contact Attempting to Schedule Completion Pending

View Slip

Patient Details
(604) 222-3333 (Home) (778) 999-2233 (Mobile) duck.d@test.com

Referral Updates	
Date	Note
Sep 24, 2024	I've called the patient and left a message and will reach out again later today.
Sep 24, 2024	Patient urgently needs implants, they are currently experiencing some discomfort and pain.

Edit Delete

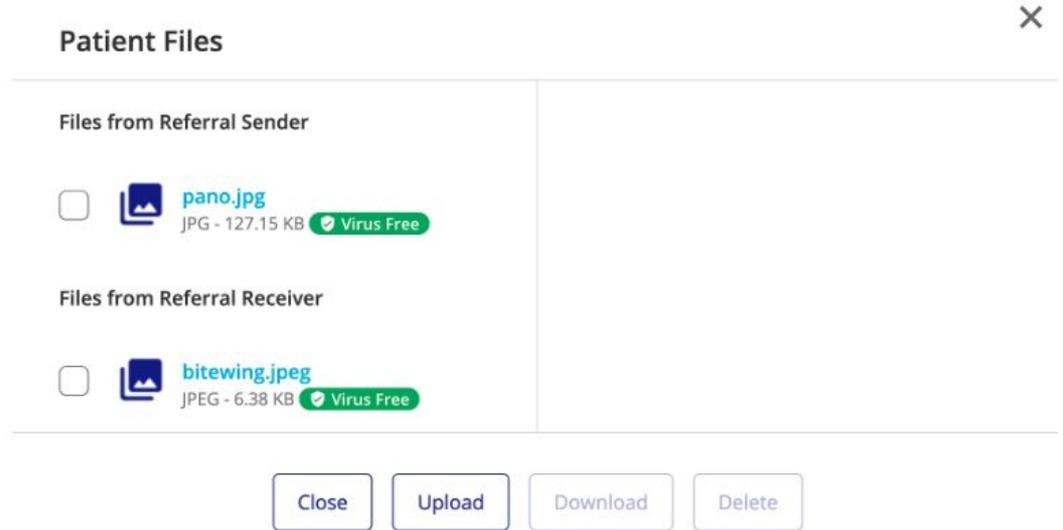
New



Steps for Referring Offices Using Referral Management:

Checking on Existing Referrals:

- Files can be viewed by clicking the “Patient Files” tab in the upper right
- Clicking this button opens the two-way file uploader.
- You can upload/download both *Files from Referral Sender* and *Files from Referral Receiver*.
- To preview a file you can click on one of the files in Patient Files. This will open a preview for you to view before you download the file.



The screenshot displays a window titled "Patient Files" with a close button (X) in the top right corner. The window is divided into two sections: "Files from Referral Sender" and "Files from Referral Receiver".

Files from Referral Sender:

-  **pano.jpg**
JPG - 127.15 KB Virus Free

Files from Referral Receiver:

-  **bitewing.jpeg**
JPEG - 6.38 KB Virus Free

At the bottom of the window, there are four buttons: "Close", "Upload", "Download", and "Delete".



Frequently Asked Questions

Is this portal secure?

Every part of Intiveo's app is designed to be compliant with HIPAA and PEPIDA, so you can rest assured that your patients' data is transmitted and stored securely in compliance with US and Canadian law. We know your patients are the most important part of your practice, so we don't take chances with their personal information, especially when you're sending it to another practice.

Do I need to create a user to send referrals?

Yes, in order to provide you status updates on your referrals and to make the submission process extra secure, we require all senders to create a user. It's easy, and it only takes two minutes to configure your account and start sending referrals.

Why do I need to enter my office phone number?

We require this to help prevent duplicate users for the same office. Because different staff members may have different email addresses, we need a secondary piece of office info to double check for other users at the same office.

How do I send referrals via Intiveo?

- Log in to the referral portal. If you don't have a user, we'll help you create one as part of the login process.
- Click to add a new referral.
- Complete the referral form.
- Attach any files you'd like to transfer to the receiving office.
- Click submit, and you're done.
- Once you're done, you can start another referral or check the status of an existing referral to view updates or download a PDF of the referral slip.



Frequently Asked Questions

How do I check on the status of a referral I already sent?

Simply log in to the receiving office's referral portal and click to view your existing referrals. By clicking on a specific patient's name, you can see more details, including any notes shared with you by the receiving office as well as a status bar at the top that lets you know at a glance whether the receiving office has been in touch, booked an appointment, or completed the patient's treatment.

What files can I transfer via this tool?

- You can transfer all common image formats (BMP, GIF, JPEG, JPG, PNG, TIF, and TIFF) as well as PDF files.
- Each file can be up to 50MB in size
- You can have up to 10 files associated with each of your referrals at any given time.

In future, Intiveo may add support for additional file formats to make file transfer even simpler.

Can I edit or submit new files for a referral after it's created?

It is not currently possible for senders to edit a referral once it's submitted, but you are able to delete files uploaded to the referral or to upload additional files as needed, within the system's restrictions on file size, quantity, and type.

What does it cost to send referrals?

Sending referrals is free and always will be. The receiving office pays the cost of the referral portal, not you.

Can I refer to more than one office via Intiveo?

You can refer to as many offices who use Intiveo's referral system as you like. To add a new sender, simply visit the new receiving office's referral portal and sign in. That office will be added to your list of eligible recipients when you send a new referral. All of the existing referrals for your various offices can be viewed on the same page.



Frequently Asked Questions

Who can see the referral information once I submit it?

The receiving office and any internal staff they've authorized to access their referral system will be able to see your referral once you submit it to the receiving office. No one else has access to your patient's personal information.

How do the tooth notation options work?

Each referral form includes an optional odontogram so you can identify specific teeth that require treatment and avoid miscommunication. The tooth labels are customizable, so you can pick Universal Numbering System, FDI Notation, or Palmer Notation—whichever one feels the most natural to you. The receiving office will see the corresponding tooth chart with their preferred labels, converted automatically. Any tooth numbers you mention in the case notes are not automatically converted, so be sure to select the relevant teeth in the tooth chart (if necessary) to prevent treatment errors. Your preferred notation system will also be used when generating the PDF version of your referral if you choose to download one.

