MassOMS

Referral Portal

01

Getting Started (Login/Sign Up)

Access the Portal
- Visit the receiving office's referral page (via email invite or their website).
- Enter your office email and main office phone number.

New Users
- Verify your email (link expires in 60 seconds).
- Complete office registration details (this info attaches to all referrals).

Existing Intiveo Users
- Log in using your existing Intiveo credentials.
- If you already use Intiveo (e.g., appointment reminders), no new account is needed.

One-Time Setup

02

Office Information
- Office name, email, phone number, address.
- Used to identify your office on referrals.

Providers
- Add providers who will be sending referrals.
- Customize provider display names for clarity.

Preferred Tooth Notation
- Choose one:
  - Universal Numbering System
  - FDI Notation (ISO 3950)
  - Palmer Notation
- **Receiving office will automatically see teeth converted to their preferred system.**
- **Security & Compliance**
  - Create a secure password (minimum length, upper/lowercase, numbers).
  - Agree to Terms of Use (HIPAA & PIPEDA compliant).

03

Sending a Referral

Start a Referral
- Log in to the referral portal.
- Click "Refer a New Patient".

Patient Information
- Enter patient demographics and contact details.
- Indicate preferred contact method if required.

Referral Details
- Referring Provider
- Requested Provider (if applicable)
- Procedure(s)
- Case notes (optional but recommended)

Tooth Chart
- Select affected teeth using the interactive odontogram.
- Tooth numbers entered in notes are not auto-converted — always use the chart to avoid errors.

Scan the QR code to view the full step-by-step guide.

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04

Uploading Files

Optional Attachments
- Submit referral with or without files.

File Rules
- Max file size: 50 MB per file
- Max files per referral: 10
- Accepted formats:
  - PDF
  - BMP, GIF, JPG, JPEG, PNG
  - TIF, TIFF
  - DCM / DICOM
  - STL

05

After Submission
- Referrals are sent instantly.
- No cost to send referrals (receiving office pays).
- You may:
  - Start another referral
  - Check the status of existing referrals
  - Download a PDF copy of the referral

06

Checking & Managing Existing Referrals

View Status
- Log in → Check or update an existing referral.
- Click a patient name to view details.

What You Can See
- Referral stage & status updates
- Appointment progress (contacted, booked, completed)

Notes
- Two-way notes between referring and receiving offices.
- New notes from the other office display a "New" badge.

Patient Files
- Access via Patient Files tab.
- Two-way file sharing (sender & receiver).
- Preview files before downloading.

Scan the QR code to view the full step-by-step guide.