



Patient Studio 2.0
Specialist Referral Form User Guide
Marketing to Referring Docs

June 2014

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Referrals Management

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Probably, the majority of patients that visit a medical or dental specialist are referred to that office by another healthcare practice. Referring doctors are the “life blood” of most specialty practices.

This Patient Studio 2.0 function has specifically been developed for specialists who receive patient referrals from general practitioners and other docs. Many practices typically send out hard copy “referral pads” or business cards and ask the referring doc to fill in the pertinent information and either fax it back or give it to the patient to bring to their first appointment. This approach is an inefficient system that often slows down the process, that may cause wasted time and that may lead to upset patients. With this method, it is not uncommon to “lose” a referral when a patient speaks to a friend who recommends another doc before the patient calls your practice.

Here’s how the Patient Studio Online Referral protocol works. A referral request/“thank you” letter with a link to your referral form is emailed to all your referring doctors.

The referring doc provides the patient contact information and can describe the nature and severity of the patient’s problem; and may also type special instructions to the specialist. A great feature of this form is that it allows the referring doc to upload clinical photos and radiographs right into the form. When the form is submitted, both docs can talk real time by phone or Internet chat while looking at the radiographs.

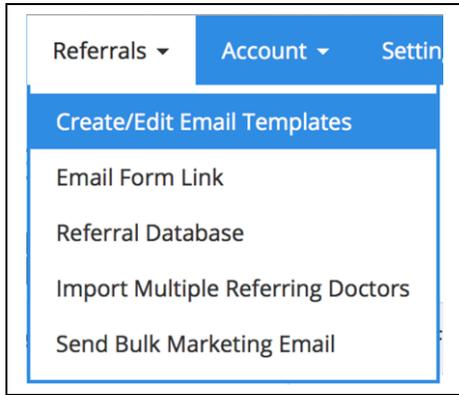
Since your office has already received the patient’s contact information, you can immediately send a welcome letter to this new patient, which might reach the patient’s email before they leave the referring doc’s office.

To get started, you must have or obtain the referring practice name [or referring doc’s name] and the office email address.

We highly recommend that you also start to enhance your PS 2.0 referral database with contact information from potential referring docs. As a suggestion, have a front office staff person call several potential referring offices each day that you consider to be in your geographic reach. You don’t need to speak with the doc. Just say to the other staff person, “I am calling from ‘Dr. John Doe’ who would like to email ‘Dr. XYZ’ some information. What is the best email address to use?”

Create a second referral template called “Potential Referring Doc” and customize it with the appropriate text [see sample on page 5] Sending the referring doctor the introductory invite, automatically adds them to your database for bulk marketing.

Create a template for each month that can be used for “bulk” marketing to all referring and potential referring doctors. Change the text in each to highlight one item like a technique or procedure used in your office or some advanced training you took or highlight a staff member or associate or a study club meeting – keep it relatively short – Give each template a title like GP Marketing January, GP Marketing February, etc... Set up a schedule for a day each month when you will send, with one click, this powerful marketing email. If you are a study club director, keep the meeting dates in mind.



To create a new template, select “Create/Edit Email Templates” under the “Referrals” drop down menu.

Alternatively, this section can also be accessed by clicking on “Settings” and then on “Manage Email Templates.”

You can **customize the text** in the **subject line** and in the body of the “Referral” letter.

You are permitted an unlimited number of templates. For example, you can have “Potential Referring Doctor” that would necessarily have different text than an existing referring doctor. Just before sending the referral letter, be sure that the correct template name is displayed, so the appropriate text is included.

Note: When the template is “Previewed” or sent, there will be default text under the customized text that cannot be changed by you. These are instructions to the referring doctor and the link to your referral form.

This is the standard template and default text used to contact your referring docs and provide them with the link to your referral form. You can customize it by changing the name of the template, subject line and/or the text in the body of the email. If you don’t change the text, it will be sent as seen.

For referral templates, **only** choose “Referral Doctor Marketing” as the template type and “Patient Referral Form” where you are asked to “Choose One or More Forms.”

When you are satisfied with the changes, click on “Save Changes” A pop-up will appear on your computer screen to indicate that this was successful. Click “OK” and you will be returned to your list of forms on your “Manage Email Templates” page. From this same page you may delete a form or “Preview” it. It is also possible to preview a template when creating or editing a template by clicking the “Preview Email Invite” button.

Edit Email Template

Name of Email Template

Choose the Template Type

Referral Doctor Marketing
▼

Choose One or More Forms

Patient Referral Form

×

Subject of Email Template

Font ▼ Size ▼ **B** *I* U A ▼ **I**_x

We have a secure, convenient and time saving process for you to refer patients to our office. Please complete our "PATIENT REFERRAL FORM," providing as much information as possible - especially the patient's email address, so we can email them a welcome letter and have them fill out a new patient form. Thanks for your past and continued confidence you have shown in us by your referrals.

body

Cancel Changes

Preview Email Invite

Save Changes

Referrals ▾ Account ▾ Settings ▾

Create/Edit Email Templates

Email Form Link

Referral Database

Import Multiple Referring Doctors

Send Bulk Marketing Email

Manage Email Templates

Create New Email Template

Template Name	Ass
Patient Referral Form	Pati

New Email Template

Name of Email Template Choose the Template Type

Choose One or More Forms

Subject of Email Template

Font Size B I U A- [Icons]

To create a new template, select "Create/Edit Email Templates" under the "Referrals" drop down menu.

Alternatively, this section can also be accessed by clicking on "Settings" and then on "Manage Email Templates."

Click on "Create New Email Template."

For referral templates, **only** choose "Referral Doctor Marketing" as the template type and "Patient Referral Form" where you are asked to "Choose One or More Forms."

Customize the template by typing the appropriate information into three fields – "Name of Email Template", "Subject of Email Template," and the text in the body of the email.

Note: When the email is sent, the "Name of the Email Template" will not be visible.

When you are satisfied with the changes, click on "Save Changes" A pop-up will appear on your computer screen to indicate that this was successful. Click "OK" and you will be returned to your list of forms on your "Manage Email Templates" page.

In the example below, the template is meant to be sent to a potential referring doctor, so the text lists the specialist's qualifications and experience along with a request to get together.

Edit Email Template

Name of Email Template Choose the Template Type

Choose One or More Forms

Subject of Email Template

Font Size B I U A- [Icons]

We have a secure, convenient and time saving process for you to refer patients to our office. We would like you to complete our "PATIENT REFERRAL FORM"

As previously mentioned, we recommend that you create marketing templates for each month. Below are some hypothetical examples. Be as creative as you like. This is the perfect opportunity to “show off” yourself and your practice so as to increase the number of referred patients from other practitioners.

GP Marketing January [Name of Template to be used]

We really appreciate the confidence you show in us by your patient referrals. If you would like to have lunch with me to discuss any specific cases or discuss future referrals please call to set that up. Thanks.

GP Marketing February

We continue to strive for excellence with your referred patients by maintaining your high standards of patient treatment. This starts with the convenient and time-saving online referral form that we utilize. Please give us some feedback on the process. Thanks.

GP Marketing March

This is a reminder that the Long Island Dental Study Club will meet on March 15, 2014 at 6 PM at the Steak House Restaurant. After dinner we will have a guest speaker, John Doe, who will discuss electronic forms for high tech practices.

GP Marketing April

Recently, I attended a hands-on workshop at NYU Dental School, Continuing Education Department on Sinus Lifts thru the lateral wall so that your patients with a lack of maxillary bone in this area will have the opportunity for implant therapy. Please contact me at 516-593-3806 so we can set up a time to review the possibilities. Thanks.

GP Marketing November

Happy Holidays! We would like to invite you and your staff to a holiday party at our office on Wednesday, December 15, 2014 at 6 PM. Please RSVP to Joan at 516-593-3806 with the number of attendees before December 7th. Hope to see you there.

Patient Referral Form	Patient Referral Form
Patient Referral Form inv	Patient Referral Form
GP Marketing January	Patient Referral Form
GP Marketing February	Patient Referral Form
Potential Referring Doc	Patient Referral Form
GP Marketing March	Patient Referral Form
GP Marketing November	Patient Referral Form
GP Marketing April	Patient Referral Form

The screenshot displays the 'Email Form Link' interface. On the left, a navigation menu is open under 'Referrals', with 'Email Form Link' selected. Below the menu, a confirmation message states 'Information has been saved.' with an 'OK' button. The main form area is titled 'Email Form Link' and contains the following fields and controls:

- First Name:** Text input field with placeholder 'Enter referring doctor's first name...'.
- Last Name:** Text input field with placeholder 'Enter referring doctor's last name...'.
- Email Address:** Text input field with placeholder '@ Enter email...'.
- Confirm Email Address:** Text input field with placeholder '@ Confirm email...'.
- Practice Name (Optional):** Text input field with placeholder 'Enter Practice name...'.
- Send Email Invite:** A checked checkbox labeled 'Send Email Invite to this New Referring Doctor'.
- Select an Email Template:** A dropdown menu currently showing 'Patient Referral Form'.
- Buttons:** 'Manage Email Templates' (blue), 'Cancel Changes' (grey), 'View or Edit Referral Template' (grey), and 'Save and Send' (blue).

To send a request for online patient referrals to your GP referring docs, along with the associated form, click on the arrow next to "Referrals" in the top tools bar and then click on "Email Referral Request." When the window opens up titled, "New Referring Doctor," type in the first and last name fields for the referring doc and type in and confirm their email address. You may complete the optional field by entering the practice name also.

Be sure the correct template has been selected to be sent. By default, the "Patient Referral Form" template has already been chosen for you. You can change the drop down menu to send other templates in the future to one office or you can send any template to all your referring docs with one-click using the "Send Bulk Marketing Email" section.

Next, left click on "Save and Send" – The email template with the link to the referral form will be sent and the name and contact information will automatically be added and saved to your referral database for bulk email marketing. This will be indicated by a pop-up on your screen that reads, "Information has been saved." Click OK to return to the same screen.

If you need to make any changes to your template, click on "Manage Email Templates." This will redirect you to the section where you can edit or create a new email template.

When your referring doc receives the email request for patient referrals, they will click on the link to your referral form where they will register with an email and password. The same link will work for any and all patients they send you in the future. But each time you send them a marketing message, the link will be included.

When the form is submitted, you will receive an email from Patient Studio and a notification in your PS "Inbox." Please check "View Submitted Forms" to retrieve.

Referrals Management

Referral Database

Opt In/Opt Out

Referrals ▾ Account ▾ Settings ▾

- Create/Edit Email Templates
- Email Form Link
- Referral Database**
- Import Multiple Referring Doctors
- Send Bulk Marketing Email

To manage your referring doctor database, click on “Referrals” and then on “Referral Database.” This will bring up a list of all referring docs and potential referring docs that have been entered.

This will bring up a table with 5 columns and various action buttons.

Column #1 lists the referral’s name; column #2 lists the practice name (optional when sending referral request); column #3 records the practice email; column #4 indicates whether the practice is Opted In or Opted Out. **Note:** If you notice that an existing referring doc has Opted Out, call them to find out why. There may have been a misunderstanding or problem of which you are unaware; column #5 allows the user to edit or delete a referral.

Create New Referring Doctor Search:

Show All Show Only Opt-Out Show Only Opt-In

Name	Practice Name	Email	Opt-Out	Actions
Mona Hilton		Mona@genesistgt.com		Edit Delete
Keith Rossein	Oceanside dental associates	Krossein@optonline.net		Edit Delete
Jon Test		Jon@firstfactory.com		Edit Delete
John Rogers		Jr_test@submitpatientforms.com		Edit Delete
John Doe		Jd_test@patientstudio.com		Edit Delete
Dr. Harry Winston		Harrywinstondds@winston.com		Edit Delete
Dr. Bob Hammer	Hammer Dental Associates	Drbob@hammerdental.com		Edit Delete
Dr. Albert Einstein		Dentpub@optonline.net		Edit Delete
douglas rossein		Krossein@submitpatientforms.com		Edit Delete
Best Docaround		Bestdocaround@gmail.com	Opted out on 04/17/2014 11:23 AM	Edit Delete

10 Referring Doctors and 1 Opt Outs

“**Create New Referring Doctor**” – Brings up a new page that quickly allows the user to create a new referring doctor. If you are only adding a name to the data base and not sending a request, click on the white check in the blue box to deactivate “send” and then click on “Save.”

Search Bar – Allows the user to search any field in the referrals table by typing in name.

Show All – Shows all doctors in database.

Show Only Opt-Out – Only shows doctors that opted out of receiving emails.

Show Only Opt-In – Only show doctors that have not opted out. Note:

Send Email Invite to this New Referring Doctor

Select an Email Template

Patient Referral Form [Manage Email Templates](#)

Cancel Changes View or Edit Referral Template Save and Send

Send Email Invite to this New Referring Doctor

Select an Email Template

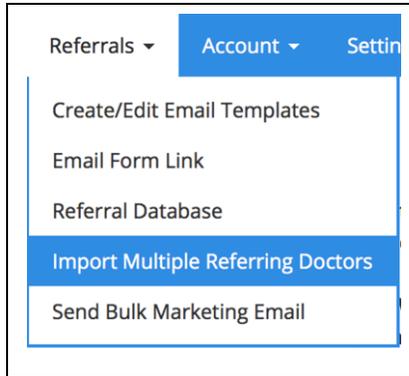
Patient Referral Form [Manage Email Templates](#)

Cancel Changes View or Edit Referral Template Save

Referrals Management

Importing Multiple Docs

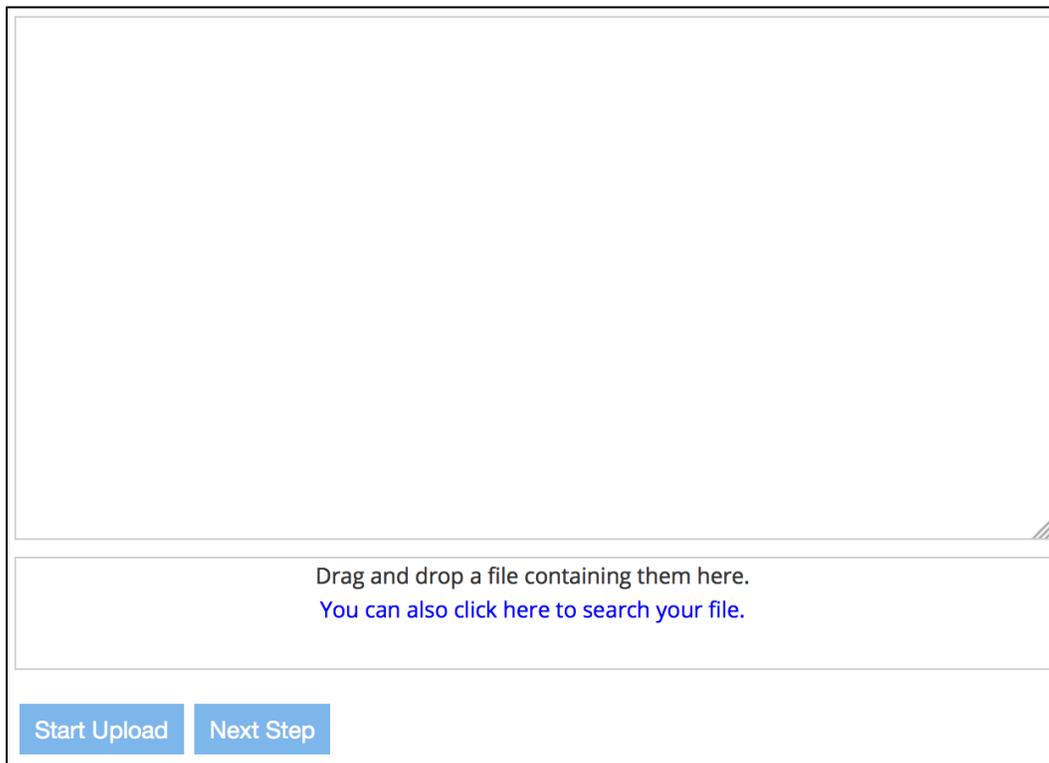
Microsoft Excel



Be sure to keep your referral database up to date and add potential referring docs when the opportunity arises. This can be a powerful marketing tool to receiving new patients.

There are two ways to import multiple referring doctors at one time. You can place the referring doctor's information as three fields (columns) in **Microsoft Excel** - first name, last name & email address (order is irrelevant). When your list is complete, **save the file as a 'CSV file (comma delimited)'**.

The other option would be **to create a list in a Microsoft Word document**. List on separate lines the first name, last name & email address with each, separated by a comma. **Save as 'Plain text'** file (found under other formats). Follow our instructions below



Once the file is dragged onto the browser or chosen to be uploaded manually, you can begin the upload process.

Importing Referrals (continued)

In this example, the file is titled CSVreferrals.csv. Click on the orange “X” to cancel. Once you have the correct file, click on Start Upload.

You will then see the list of names and emails in the CSV file now in the importer.

Drag and drop a file containing them here.
[You can also click here to search your file](#)

CSVreferrals.csv 0.13 KB X

Start Upload Next Step

```
First Name,Last Name,Email
Jon,Test Import,jon@firstfactory.com
Name,Test Import,email@email.com
Importer,New,testers@ps.com
```

This is an editable field, which allows you to make additional changes to the referring doctors if needed. Click on “Next Step” once you are ready to proceed.

Patient Studio will now create the proper columns that you can customize depending on what is in your file.

Importing Referrals (continued)

Column 1 First Name Jon Name Importer	Belong to... Skip
Column 2 Last Name Test Import Test Import New	Belong to... Skip
Column 3 Email jon@firstfactory.com email@email.com testers@ps.com	Belong to... Skip

Belong to...

Skip

Skip

First Name

Last Name

Email

Practice Name

Click on the following drop down menus to select which column belongs to its proper field. Do this for all the columns listed. In the case of this example the columns are First Name, Last Name, email, respectively.

Click on Cancel Changes to cancel the import process and return to the previous screen.

Click on Import Referrals once you are ready to complete the process

Troubleshooting the Import Process

If you receive an error message such as this, you will need to Cancel Changes to go back to the previous screen and correct the issue

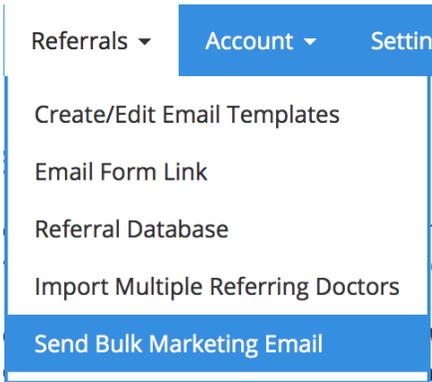
Wrong Email format in line 1.

OK

Referrals Management

Sending Bulk Marketing Email

Choosing Template



The table will display the template name, the date it was sent, and how many doctors received the email.

To send the bulk emails to referring doctors, click on “Referrals” and choose “Bulk Marketing Email” from the drop down menu.

When the window opens, use the drop down menu to select which template should be sent. It is our strong recommendation that you create at least 6 months of marketing templates in advance and develop a schedule of when they should be sent. We have provided some examples on page 6 of the types of marketing that can be very effective.

Once a template is selected click on the “Preview Email Invite” button to check and review the text.

Note: Only emails that are currently opted in will receive emails.

Click on “**Send Email**” and the promotional template is sent to your entire database [excluding the opt-out docs].

Send the following template to all 9 referring doctors in the database

Template Name	Date	Number of Doctors
Potential Referring Doc	December 27, 2013 at 1 PM	29
GP Marketing January	January 5, 2014 at 3:22 PM	35
GP Marketing February	February 5, 2014 at 12:45 PM	35
Potential Referring Doc	February 20, 2014 at 10:00 AM	40
GP Marketing March	March 5, 2014 at 11:00 AM	38
GP Marketing April	April 7, 2014 at 11:45 AM	41