



ORTHO2

# Finding Lost Referral Sources

by **Natalie Beaton**

**U**p until now, there was no easy way to find the patients who have no referral source listed. Any patient whose referral source was overlooked was simply not listed on any of the referral analysis reports. This means that any production from that patient was not credited to any referral source, and the figures could easily misrepresent the actual referral trends in your practice.

For those of you not aware of the implications of an empty referral source or those of you who have been carefully going back through your patients to make sure it is filled in correctly—life is about to get a lot easier! The brand new and very exciting No Referral Source Report will allow you to run a list all patients who have no referral source within any time frame you choose. Simply reviewing this report and entering the actual referral source will change any referral analysis reports to accurately reflect the number of patients and total production being referred by each individual referrer.

This report is available by visiting the Report Repository on [www.ortho2.com](http://www.ortho2.com). It can be downloaded from the Miscellaneous section. If you have not been checking referral sources, you may want to consider running the report for the last two years or setting up a subgroup for active patients. ☺

## About the Author



Natalie Ann Beaton is a Practice Management Consultant for ViewPoint offices. She focuses on developing consistency and making maximum use of available technology. She can be reached at [joyfulchange@comcast.net](mailto:joyfulchange@comcast.net). Other articles from Ms. Beaton can be found in the Practice Resources section of [www.ortho2.com](http://www.ortho2.com). She will be teaching classes at the 2007 Users Group Meeting.

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