Patient Referral Program Checklist

Use this checklist when launching your practice's Patient Referral Program.

1 SETUP

☐ Define referral goal (e.g., new patients)
☐ Decide who can refer (patients, staff)
☐ Choose reward (small, non-cash)
Ensure it is not tied to insurance or VSP plans
☐ Create clear patient messaging
☐ Set program rules (limits, eligibility)
☐ Confirm compliance requirements

2 TRACKING

☐ Determine tracking method
☐ Ask every new patient how they heard about the practice
☐ Record all referrals consistently
Do not collect personal health information

3 PROMOTION

☐ Mention program at check-out
☐ Mention during follow-ups
☐ Display in-office signage
☐ Include in emails or newsletters

4 REWARDS

☐ Verify referral completed
☐ Provide reward promptly
☐ Track rewards given

5 MEASURE

☐ Count new patients from referrals
☐ Track total referrals
☐ Track rewards redeemed
☐ Collect patient feedback

6 FINAL CHECK

☐ Reward is small and non-cash
☐ Not tied to insurance
☐ Tracking system in place
☐ Staff training
☐ Program visible to patients
☐ Compliance confirmed

7 ONGOING MONITORING

☐ Refresh messaging and materials
☐ Adjust reward if needed
☐ Review compliance regularly

For additional Patient Referral Program resources, visit **premieredgemarketing.com**.

vsp PREMIER edge marketing support