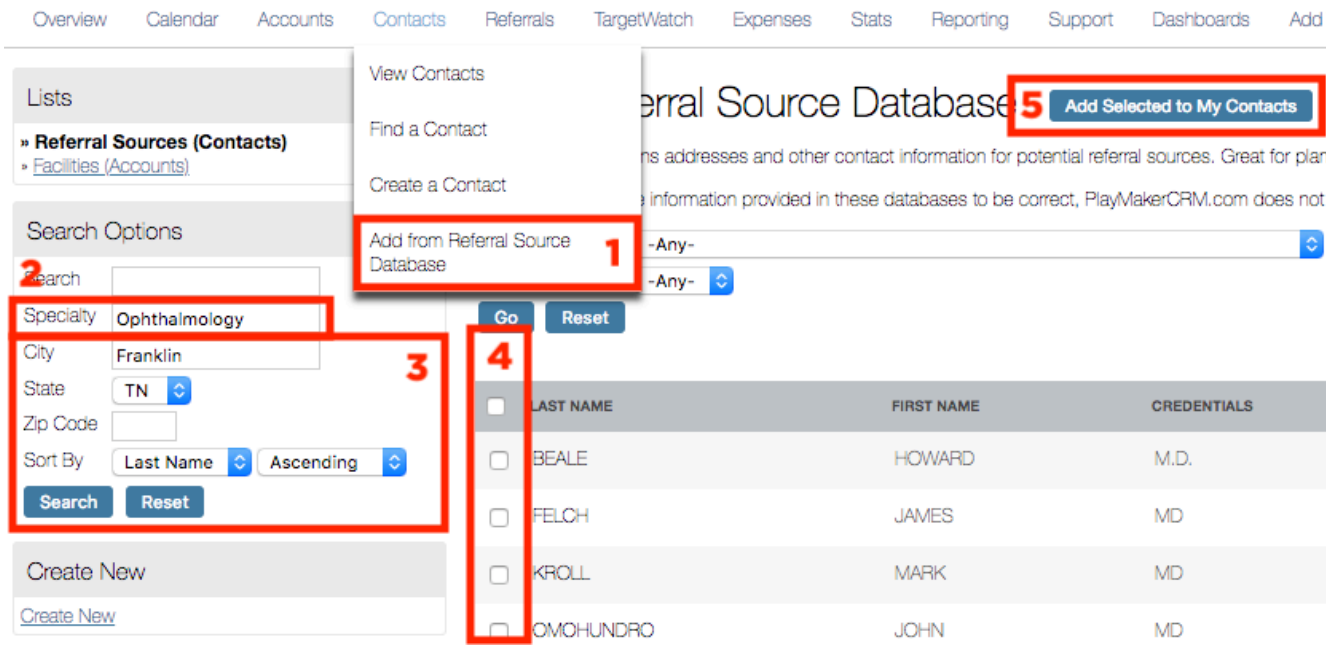
Finding Referral Sources: Contacts

The Referral Source Database offers an easy way to find new referral sources and import them into your book of business. This article reviews how to search for contacts in the Referral Source Database, and how to limit the results to find the most relevant contacts.



Steps to add Contacts from Referral Source Database:

1. Mouse-over the Contacts link and click Add from Referral Source Database.
2. Enter a Specialty to limit the search to relevant contact types.
3. Enter the City and State in which you would like to search for Referral sources, then click Search.
4. Once viewing the list of contacts, check the boxes next to any physicians you want to add to your contacts.
5. Click the Add Selected to My Contacts button.

Keep in mind:

- Any contacts added from the Referral Source Database will be assigned to the user adding them to the database, so they may need to be reassigned later.
- Some contacts may not be listed in the location selected, as they register themselves and can be registered in another City, State or Zip Code.
- Some contacts may not be listed in the location selected as they may not have set the same Specialty in the NPI Registry.
- If a contact's NPI already exists in your PlayMaker environment, the contact will not show up in the Referral Source Database. This is intentional, and designed to prevent duplicate contacts from being imported.