



# Invite Providers

## Invite a Colleague

### **Purpose:**

Practices may invite another practice to sign up with Everseat in order to have patients referred to them through the referral tool. The invitations give access to open appointments to other practices and providers that send referrals to you. **Sending referrals is free.**

### **Best Practices and Examples:**

This feature is used when a practice receives multiple referrals and wishes to receive them through Everseat. This tool also gives invited practices the ability to automatically schedule referred patients at another practice on Everseat. Practices that are invited will be provided a free referral portal on Everseat.

Colleagues could be invited two different ways:

1. Through a unique direct link that can be sent via email
2. Through an invitation form

### **Directions for Inviting Another Provider:**

Step 1 – Navigate to the ‘Invite Providers’ tab on the dashboard.



## Invite a Colleague

Ask a colleague to sign up with Everseat to send patients to you through our referral tool.

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### Step 1

Include a link to your referral signup page on your website:

[https://demo.everseat.com/signup/referring?referral\\_code=vwjmror30u](https://demo.everseat.com/signup/referring?referral_code=vwjmror30u)

### OR

### Step 1

Send an invitation to someone using this form.

Please include a personalized message so they know why Everseat has worked for you.

### Step 2

Once they signed up for a free account, they will be able to send you referrals right away!

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Provider Name	Email Address
<input type="text"/>	<input type="text"/>

Message

File Edit View Format

Formats B I [bulleted list] [numbered list] [link icon] [unlink icon]

Hello,

Your colleague at Fortune Community Hospital invites you to refer patients to them through Everseat. By accepting the invitation, you can check your colleague's availability and make appointments right away for your patients.

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Step 2 – Select which way you would like to invite another practice.

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## Invitation via Direct Link

1. Copy the provided link– this link can either be shared via email or be placed on your website

### Step 1

Include a link to your referral signup page on your website:

[https://demo.everseat.com/signup/referring?referral\\_code=vwjmr30u](https://demo.everseat.com/signup/referring?referral_code=vwjmr30u)



2. Practices that click the link are invited to create a free referral account on Everseat
3. When a practice signs up using the custom link, they will automatically be linked to your practice and its available appointments

## Invitation via Invitation Form

1. Use the provided form to directly send an invitation to a specific provider or practice

Provider Name

Email Address

Message

File - Edit - View - Format -

← → Formats - **B** *I* [List Bulleted] [List Numbered] [List None] [List Square]

Hello,

Your colleague at Fortune Community Hospital invites you to refer patients to them through Everseat. By accepting the invitation, you can check your colleague's availability and make appointments right away for your patients.

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2. Enter the provider's name and email address

A screenshot of a form with two input fields. The first field is labeled 'Provider Name' and contains the text 'Doctor Smith'. The second field is labeled 'Email Address' and contains the text 'drsmith@doctorsoffice.com'. Two teal arrows point to the right, one pointing to the 'Provider Name' field and one pointing to the 'Email Address' field.

3. Customize your message and click 'Send' to invite the practice

A screenshot of a message editor interface. At the top, there is a menu bar with 'File', 'Edit', 'View', and 'Format'. Below the menu bar is a toolbar with various icons for text formatting. The main text area contains the following text: 'Hello Dr. Smith', 'Your colleague at Fortune Community Hospital invites you to refer patients to them through Everseat. By accepting the invitation, you can check your colleague's availability and make appointments right away for your patients.' A teal arrow points to the right, pointing to the text area. At the bottom left, there is a teal 'SEND' button with a teal arrow pointing to it. To the right of the 'SEND' button is a link labeled 'Reset Content'. At the bottom right, there is a small text that says 'POWERED BY TINYMCE .d4'.

4. The email invite will include a link for the practice to sign up for a free referral account on Everseat
5. When a practice signs up using the link in the email, they will automatically be linked to your practice and its available appointments