July 8 - Referral Tracking for Clinic Growth and Marketing Management

This video provides a guide on how to effectively track client referrals and analyze related revenue metrics within the Juvonno system.

System Updates

- Recent changes to HR, specifically for Ontario clinics, involve updates to the OCF 18 and 23 forms, which impact the management of MIGs and MVAs

Technical Update: Ontario OCF Clone Optimization

Problem Solved

When cloning old Ontario Claim Forms (OCF-18 and OCF-23) created prior to the June 29th legislative changes (governing MIGs and MVAs), users currently have to manually contact the support team to force an update to the new regulated versions.

Core Functionality

An upcoming automation patch from the development team will automatically upgrade and migrate historical OCF formats into the latest legally compliant versions during the duplication/cloning workflow.

Technical Implementation / Config

- **Status:** In active development.
- **User Impact:** Fully automated backend logic; eliminates manual support tickets for template version updates.

Feature Title: Custom Cases and Referral Revenue Tracking

Problem Solved

Clinics lacked a streamlined, native way to attribute recurring revenue to dynamic internal and external referral sources over time. Traditional profiles only capture initial intake acquisition data, failing to track source shifts when a returning patient presents with a brand-new clinical case or area of injury.

Core Functionality

By repurposing and enabling the core system configuration module historically designated for "Complaints," clinics can transform the module into "Client Cases". This builds a historical timeline of individual injuries per patient, mapping custom data filters (such as Referral Category, Referral Type, and Referral Start Date) to explicit billing and appointment datasets.

Technical Implementation / Config

To deploy this tracking methodology, administrators must apply the following baseline configurations:

1. **Enable the Module:** Navigate to **General System Settings > Patients > Medical Profile** and activate **Complaints**.
2. **Relabel System Objects:** To align UX with operational tracking, update the alternate naming convention properties:
   - *Alternate Complaint Name:* `Client Case`
   - *Plural:* `Cases`
   - *Note:* Modifying this property globally updates system strings, including renaming the default "Patient Complaints" system report to **Patient Cases**.
3. **Configure Custom Fields:** Under the case module properties, add the following discrete custom tracking schema fields:
   - `Client Type` (Drop-down: New, Returning [<18 months], Reactivated [>18 months], Internal Referral)
   - `Referral Name` (Text box fallback for missing directory entities)
   - `Referral Start Date` (Date picker to differentiate initial active revenue windows from continuing treatment revenue)
4. **Establish Referral Hierarchy:** Populate backend directories with a two-tiered organization framework under system settings:
   - **Categories (Buckets):** (e.g., Physicians, Advertising Channels, Internal Providers, Promotions).
   - **Types (Sources):** Child nodes mapping to the parent categories (e.g., Specific doctor names, specific social networks, or specific internal staff IDs).

Caveats & Limitations

Appointment Mapping Dependency: Data from newly generated cases will populate as completely blank nodes ($0.00 value metrics) on financial and statistics reports unless the specific Case object is explicitly linked to individual booked appointments.

State Maintenance: Case statuses must be manually updated to "Discharged" upon treatment completion. Failing to close cases leaves them active in the UI list, skewing analytics data accuracy.

Portal Restrictions: Custom Cases cannot be modified or generated by patients via the online portal interface; management is strictly confined to admin and provider roles during booking or assessment.

Export Overhead: Synthesizing these data sets into visual dashboards currently requires a manual workaround via the *Patient Cases* report filtered by a specific date range, requiring manual row cleaning and formatting inside external tools like Excel. Native dashboarding inside the system's Analytics module is currently in product design.

Best Practices

Internal Incentive Schemes: Use the Provider-to-Provider mapping data within Internal Referral tracking to design and calculate accurate operational data for internal staff referral bonus programs.

Marketing Budget Audits: Run cross-reference reports monthly against external marketing spend. For instance, if a referral source channel like Google Advertising costs $5,000 but the mapped case revenue totals only $2,000, use the dashboard metrics to scale back parameters.

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