

FOR PRACTITIONERS · CHECKLIST

Your first referral: *a checklist*

What to have ready before you send your first Vively referral.

- ☐ **Your client's name and email.** If they already share results with you on Vively, pick them from your client list.
- ☐ **The testing.** The Baseline, a ready-made panel, single markers, your saved panel, a kit or a CGM. Mix them in one referral.
- ☐ **Medicare (Baseline only).** Your client needs a Medicare card and no Medicare Baseline in the last 3 months. Otherwise choose the \$299 private Baseline.
- ☐ **Who pays.** Your client at checkout, or your practice by card when you send.
- ☐ **How results are shared.** Share when ready, or review first. Held results release after 14 days.
- ☐ **A message and a private note (optional).** Your message goes to your client. Private notes are for you only.
- ☐ **Your logo and booking link (optional).** Add them once in Settings.

After you send

Your client gets one email with your recommendation, the price and a secure link. Reminders go out after 24 hours, 3 days and 7 days if they haven't paid. You'll see each step in your dashboard, and we'll email you when results are ready.