

REFERRAL
MANAGEMENT
CHALLENGES

REMOVING MANUAL
PROCESSES

USING PROCESS
INTELLIGENCE

ENSURING
COMPLIANCE &
SECURITY

CHOOSING YOUR
PLATFORM

STREAMLINING YOUR
REFERRALS

AUTOMATING YOUR
PROCESSES



FROM REFERRAL TO APPOINTMENT

***Speed is Key to Improved Care, Patient
Satisfaction and Revenue Optimization***

High-touch equals high-cost referral management

Mary was experiencing ongoing, debilitating knee pain. Her primary care physician referred her to an orthopedic surgeon. Mary, however, then experienced worsening pain as she waited — and waited — to be connected with the specialist. She was riddled with anxiety, waiting for the referral to go through, the insurance to be approved and the MRI test to be scheduled. The knee pain persisted while Mary wondered what would help: Physical therapy? Surgery? Medications?

This scenario is far too common. An inefficient referral management process makes the wait unnecessarily long and thus nerve-wracking for patients.

For healthcare systems looking to refer patients to specialists within their organizations, this long wait often results in increased costs and lost revenue as some patients give up and abandon their appointments. In fact, only 54% of traditional referrals result in a scheduled appointment.¹ And nearly 40% of providers lose at least 10% of patient

revenue to referral leakage, according to a survey of providers conducted by CHIME-Cerner.²

The problem: 76% of medical attachments are still transmitted via mail, email and fax, according to the 2022 CAQH Index.³

“Once the documents are received, you’ve got an overburdened staff having to manage the queues. Typically, these are medical assistants who are overqualified to be processing documents,” said Bruce Orcutt, Senior Vice President, Solution Strategy, ABBYY.

The challenge is exacerbated by the fact that healthcare organizations (HCOs) are dealing with unprecedented staffing shortages. “Healthcare organizations are struggling to recruit employees at \$12 or \$13 an hour when the same people can make \$24 an hour at Amazon,” said Robert Rodgers, a healthcare industry revenue cycle leader and Vice President of Revenue Cycle Management at Access TeleCare.



76% of medical attachments are still transmitted via mail, email and fax

1. Weiner, M., El Hoyek, G., et al. 2009. A web-based generalist-specialist system to improve scheduling of outpatient specialty consultations in an academic center. *Journal of General Internal Medicine* 24(6), 710–715. <https://doi.org/10.1007/s11606-009-0971-3>.
2. CHIME-Cerner. 2021. Insights into referral management. https://www.cerner.com/-/media/cerner-media-united-states/pdf-downloads/solutions/health-referrals/12191-chime-referral-management-survey-results_final.pdf?vs=1&hash=2E31994B240C8653584DD97BDF2AAD2E.
3. The Council for Affordable Quality Healthcare, Inc. (CAQH). 2022. *The CAQH Index Report*. <https://www.caqh.org/insights/caqh-index-report>.

Taking a page out of retail giants' playbooks

To make referral management improvements, HCOs must focus on the customer experience.

“The writing is on the wall: HCOs need to change and act more like the Walmarts and Amazons of the world, where that customer service mentality is in their DNA,” Orcutt said.

Unfortunately, the de facto manual referral process stands in stark contrast to this customer-centric mentality. “Fax referral orders are being sent over to the specialists, who then must process them. They’re getting the documents on a fax machine, scanning them back into the system and then trying to create the electronic order in the system,” he added.

These manual processes are extremely inefficient. “Any time you’re taking information manually from one system to another, it’s going to take longer for a human to do it,” Rodgers said. “An automated solution can do the verification steps. It can quickly calculate if all the materials have been sent over correctly. It could do a hundred checks, even a thousand checks, before our human can do one simple check.”

In addition to being inefficient, manual processes are unreliable.

“Human error is common. If you’re copying something over from one file to another, it’s super easy to make a mistake. If you’re transcribing from a piece of paper, you have a higher chance of making a mistake. So, your error rate will go down by leveraging technology to do this,” he noted.

“Any time you’re taking information manually from one system to another, it’s going to take longer for a human to do it. [An automated solution] could do a hundred checks, even a thousand checks, before our human can do one simple check.”



ROBERT RODGERS

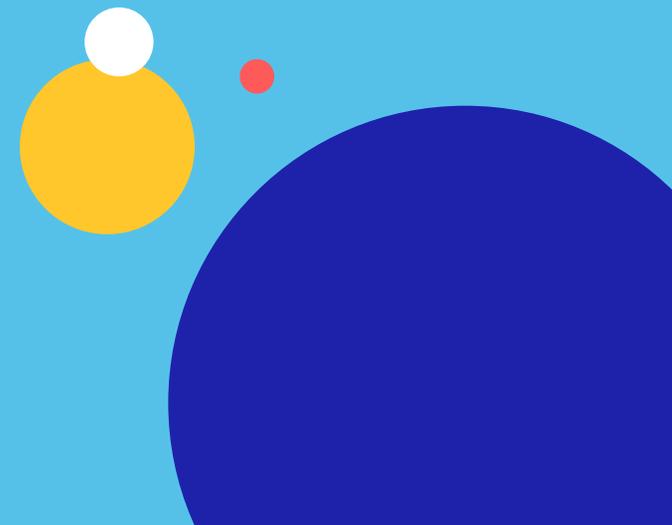
Vice President of Revenue Cycle Management | Access TeleCare

ABBYY

Turn your documents into data with pre-trained, ready-to-use skills

Intelligent Document Processing and Digital Transformation

Learn how to turn documents into data. Less data is trapped in unstructured



Process intelligence keeps healthcare organizations in the know

To improve the referral management process, HCOs need to acknowledge — and understand — the problem.

“To move forward, leaders need to know what their process is — and where road bumps exist. Process intelligence is incredibly powerful because it tells you objectively how your processes are being executed,” Orcutt said.

He added, “Logged event data tells you what happened, when it happened and who was involved. It recreates the journey of the referral from start to finish. So, it’s possible to specifically dissect where processes are breaking down.”

At the most basic level, process intelligence will identify if leakage is materializing because physicians are not aware of specialists in their networks and refer patients outside of their organizations; because referrals result in long waits and patients opt to see different providers; or a combination of the two.

The analysis is especially useful when trying to pinpoint inefficiencies. For instance, process intelligence could reveal delays in getting referrals entered into the system and then identify the root cause of the problem: Is there a problem

with the prior authorizations being secured? Are there delays in getting the patient on the phone to get scheduled? Is the patient just not showing up?

With this knowledge, HCOs can strategically pinpoint the exact solution, technology or training that could help to improve the referral management process.

“To move forward, leaders need to know what their process is — and where road bumps exist. Process intelligence is incredibly powerful because it tells you objectively how your processes are being executed.”



BRUCE ORCUTT

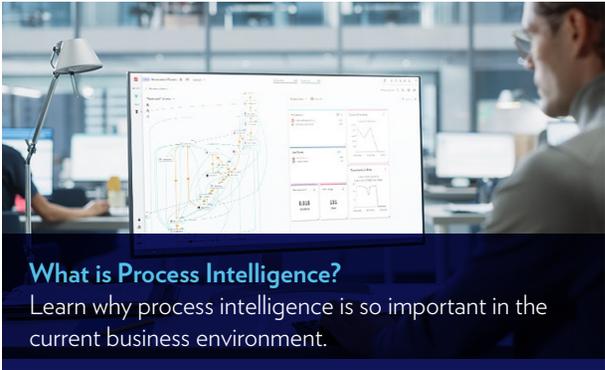
Senior Vice President, Solution Strategy | ABBYY



Transforming Healthcare Revenue Cycle Management Utilizing an Advanced Analytical Technique

Transforming Healthcare Revenue Cycle Management

Discover how process intelligence can benefit your organization.



What is Process Intelligence?

Learn why process intelligence is so important in the current business environment.

Compliance and security in the digital age

No matter what systems or platforms are being deployed, when implementing technology to address referral management, HCOs must consider data privacy and security.

“We live in a digital age, so it’s not uncommon to have processes taking place in systems that run in the cloud. The important thing is to make sure that the vendor you are selecting has gone through the appropriate steps to secure the data,” Orcutt advised. “So, working with the vendor, making sure that they are properly securing the data and having the appropriate protections in place. That’s how you make sure you’re protected.”

More specifically, to ensure that data is protected, HCOs should work with vendors that offer systems that support reasonable and competent safeguards as outlined by the American Bar Association.⁴

Indeed, while security is often focused on finding bugs and viruses, software design mistakes and weaknesses such as insecure storage or not validating data can also lead to security issues. HCOs need to ensure that software systems are flawless not only in supporting operations required for high-performance business, but in protecting them from the impact of security weaknesses as well.

“Working with the vendor, making sure that they are properly securing the data and having the appropriate protections in place. That’s how you make sure you’re protected.”

BRUCE ORCUTT



4. Ries, D.G. December 12, 2023. Employing competent and reasonable safeguards. American Bar Association.

Picking the perfect platform (for your organization)

When implementing referral management technologies such as intelligent document processing (IDP), robotic process automation (RPA) and natural language processing (NLP), HCOs can choose from a variety of platforms – SaaS, private cloud or on-premise.

“The question really comes down to: Who do you want managing the infrastructure? In many cases, it makes sense to have the vendor manage the infrastructure themselves. They know their technology, they know how to host it and they know how to scale it. So, rather than having the staff and the resources internally trained and able to support those technologies, it makes sense to outsource that,” Orcutt said.

Some HCOs, however, already have information technology staff and data centers in place. “They have put a lot of work and effort into building out their data centers and having resources that they strongly feel can protect their data and manage their systems. So, those organizations are comfortable working with an on-premise system,” he added.

HCO leaders should strive to work with vendors that understand their situation and encourage them to work with the platform that will bring the best results for their organization.

“ABBY always recommends whatever platform fits the customer’s needs best. We like to understand what the customer prefers and how they manage their infrastructure, and then we can make an appropriate recommendation based on that,” Orcutt explained.

**“The question really comes down to:
Who do you want managing
the infrastructure?”**

BRUCE ORCUTT

Platform Options



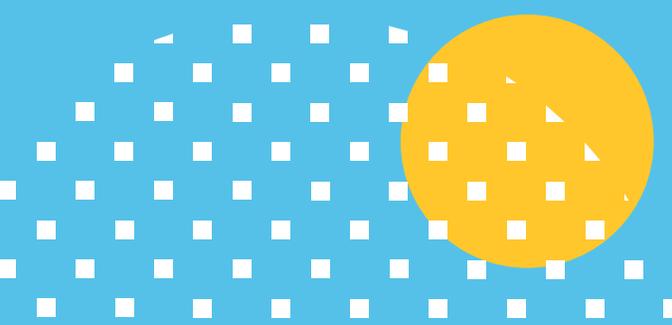
SaaS



Cloud



On-premise
Servers



From simple documents to valuable intelligence

Anyone who has worked with faxed documents in the past can relate to this unfortunate scenario: Staff return to the clinic on Monday morning and find documents from the fax machine strewn all over the floor. Orcutt has witnessed this common occurrence.

Electronic transition of referrals can help; however, the electronic documents are still sitting in the queue. “They’re a little neater, but they can still be lost in the digital abyss, and staff members still might transcribe patient and insurance information incorrectly,” he pointed out.

Advanced technologies such as IDP and RPA can help healthcare organizations bring referral management to the next level. These technologies can transform data from business and clinical-critical documents into actionable intelligence, driving real-time automation and improved clinical and revenue cycle outcomes.

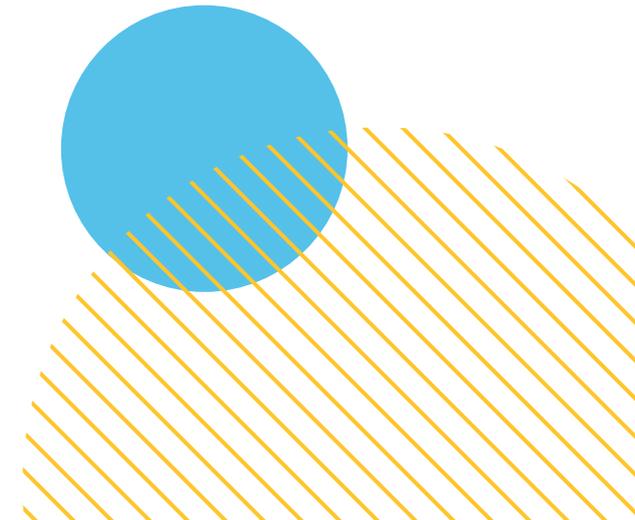
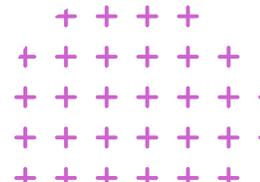
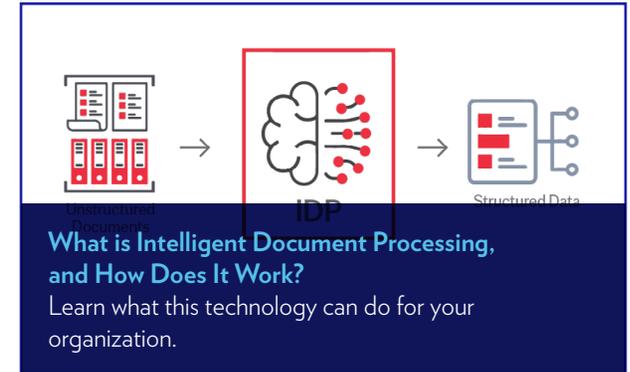
IDP, for example, employs advanced technologies such as optical character recognition, natural language processing and machine learning to automate the extraction,

interpretation and processing of data from various documents. By streamlining manual document-related tasks, IDP enhances efficiency, accuracy and compliance.

The technology also helps add significant speed to the referral management process. Consider the following: “If there’s a spreadsheet, the technology could do a thousand checks before our human can do one simple check. There’s logic built into it, so the technology discerns what’s in that spreadsheet and, based on the rules, it knows what to do next,” Rodgers explained.

“[With intelligent document processing,] the technology discerns what’s in that spreadsheet and, based on the rules, it knows what to do next.”

ROBERT RODGERS



Reaching the holy grail: Straight-through processing for referrals

Advanced technologies might be the antidote to long-held referral management challenges and can drive the customer-service mentality many forward-thinking companies have embraced.

Indeed, IDP automatically pulls the patient and referral information from the fax or email attachment and populates the electronic health record or appointment system, eliminating the need to manually enter data. Such technology has been shown to save a provider 10 minutes per referral.

This technology could potentially result in “straight-through processing,” automating the entire referral process all the way to scheduling an appointment with the specialist.

“Sure, some organizations might not use the technology to go all the way to scheduling a patient right away, but

they might send the patient an SMS text that links to the specialist’s calendar and enables the patient to set up their appointment,” Rodgers noted.

The technology not only results in cost avoidance by eliminating the need to rely on staff to process referrals but can also potentially bring in additional revenue. Consider the following: By leveraging this technology, HCOs could optimize the revenue that they collect from diagnostic services.

“If your HCO has an MRI machine, and your equipment is underutilized, the HCO will be missing out on revenue. Being effective at taking in external referrals to ensure you are highly utilizing your MRI machine can result in additional net revenue for many specialists,” he pointed out.

The technology also holds significant promise for patients like Mary, who could have experienced much less anxiety, not to mention improved clinical results, if she had been able to quickly schedule an appointment with a specialist.

These benefits can put HCOs in a position to succeed. “The technology not only closes the gap on the leakage, but it also enables healthcare organizations to get a one-up on competitors. The patient’s only going to wait so long before they’re going to go somewhere else. Organizations risk tarnishing their reputations if they consistently make patients wait,” Rodgers concluded.

**Contact us for a demo
of referral management.**

ABBYY

About ABBYY

ABBYY puts your information to work with purpose-built AI. We combine innovation and experience to transform data from business-critical documents into intelligent actionable outcomes in over 200 languages in real time. We are trusted by more than 10,000 companies globally, including many of the Fortune 500, to drive significant impact where it matters most: accelerate the customer experience, operational excellence, and competitive advantage. ABBYY is a global company with headquarters in Milpitas, CA, and offices in 12 countries, and is the [Official Intelligent Automation Partner of Arsenal Women Football Club](#). For more information, visit www.abby.com/company/ and follow us on [LinkedIn](#), [Twitter](#), [Facebook](#) and [Instagram](#).