Referral Intake
Intelligently Automated

dca
digital clinical assistant

The Challenge

- Highly manual, error-prone process involving multiple employees for up to ~30 minutes per referral
- Practices run hundreds of referrals behind, meaning initial contact is 5-6 weeks from the original referral date
- Significant room for error due to missed documentation errors, missed phone calls, accidentally deleted/shredded faxes, and poor communication between the referring provider and specialist
- Time delays can cause patients to seek care elsewhere or abandon treatment altogether

The Solution

A fully-automated referral intake process that includes

- Automated ingestion of faxes
- A tracking system for referral completion
- Automated correspondence with the patient and referring provider
- Scheduling automation

The Benefits

- **Automate up to 75% of the referral intake process**
- **Make a great first impression on new patients**
- **Increase practice revenue by booking more initial consults, faster**
- **Save over one FTE of effort annually on the processing of incoming referrals**
- **Free up team members to work on higher-value tasks**
- **Automated, rule-based data entry into EHR, CRM, appointment booking and supporting nursing worksheets**
- **Fax digestion accuracy will improve over time with human in the loop**
- **Human in the loop exception processing will allow the client to handle exceptional or rare scenario**

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Workflow

| Primary Care Provider orders specialist consultation | DCA sends referral via EMR to referral hub or fax | Appointment date associated with the referral in the EMR | Patient presents for specialist appointment | Referral documented as complete within specialist EMR | Documents sent to referring physician for review |