



Transforming Value Based Care Coordination

The screenshot displays the referral.md software interface. At the top, a navigation bar includes 'referral md', 'Tasks', 'Consults', 'Referrals', 'Flows', 'Patients', 'CRM Tools', and 'Analysis'. Below this, a 'Select Receiving Provider' section shows a referral flow: Patient (Heather Abernathy) -> Referring Provider (David Martinez) -> Receiving Provider (Jennifer Ness). A sidebar on the left contains 'REFERRAL DETAILS', 'PATIENT' (Heather Abernathy, Sep 26, 1978 (35)), 'REFERRING PROVIDER (PCMD)' (David Martinez, MD, Healthy Heart Medical Group, Berkeley-Cardiology), and 'RECEIVING PROVIDER (TO)' (Jennifer Ness, MD, Healthy Heart Medical Group, San Francisco-General Cardiol...). The main area shows a list of potential receiving providers with columns for name, specialty, city, gender, and a 'Not Accepted' status. A circular callout highlights the profile for Jennifer Ness, MD, showing her NPI (1750388740), 'Accepting new patients' status, and performance metrics: 445 Profile Views, 24493 Total Procedures, 7 Sent Referrals, and 171 Received Referrals. Below these are two bar charts: 'ACCESS Average wait times' with a score of 90 and 'CONSULTS Average response time' with a score of 2 days. The charts use a color scale from Low (green) to High (red).

REFERRALMD PLATFORM

➤ Patient Access

- Provider directory and scheduling
- Patient communications

➤ Consult Management

- Use your specialists or ConferMED*
- Route consults based on rules

➤ Referral Management

- Decision support tools
- Fax management

➤ Prior Authorizations* *(Q1-2024)*

- Benefits eligibility verification *(optional)*
- PA determination, submission, monitoring

➤ Marketing Tools

- CRM for outreach & managing network
- Market research tools *(7+ million providers)*

➤ Real-Time Analytics

- Powerful analytics across platform
- Data warehouse/BI tool integration

** Transaction fees may apply in addition to annual subscription*

SYSTEM INTEGRATIONS

- AdvancedMD
- Allscripts (Veradigm)
- Athenahealth
- Careport
- Centricity (AthenaIDX)
- Clinicient
- Compulink
- CureMD
- eClinicalWorks
- DocuTap
- Epic
- EyeMD
- EzDocs
- Greenway
- HighLevel
- InSync
- Kareo
- MDLand
- Medinformatix
- Meditech
- Mellowood
- Modernizing Medicine
- Navihealth
- NetSolutions
- Nextech
- NextGen
- Ramsoft

CONSULT & REFERRAL MANAGEMENT

- ✓ Manage all inbound and outbound consults and referrals in central work queues
- ✓ Send complete consult and referral packages to specialists based on orders from the EHR
- ✓ Triage patients based of urgency
- ✓ Alert notifications for delayed or forgotten consults and referrals
- ✓ Manage work queues by exception and quickly identify consults and referrals that need attention
- ✓ Customizable workflows

The screenshot displays a software interface for managing consults and referrals. It features a top navigation bar with tabs for 'RECEIVED' and 'SENT', a 'DEPARTMENT (ALL)' dropdown, and filters for 'Urgent (8)', 'Alerts (9+)', and 'Tasks (4)'. A search bar is located on the right. On the left, a sidebar lists various status categories and their counts, such as 'All' (273), 'New' (2), 'In Review' (58), 'Accepted' (56), 'Declined' (6), 'Scheduled' (55), 'Completed' (96), 'No Show' (0), and 'Archived'. The main area contains a table with columns for 'DATE', 'STATUS', 'PATIENT', and 'REFERRING PROVIDER'. The table lists individual consults with their dates, times, statuses (e.g., 'In Review', 'Scheduled', 'Accepted'), patient names and birth dates, and the names of the referring providers.

DATE	STATUS	PATIENT	REFERRING PROVIDER
Nov 27, 2017 5:03 PM	In Review Pending Prior Authorization	Katie Hannerty Sep 18, 1959 (58)	Jonathan Smith, MD
Nov 16, 2017 1:25 PM	Scheduled Pt Registration Pending	Cindy Buchanan Oct 18, 1974 (43)	Jennifer Ness, MD Healthy Heart Medical Group
Sep 22, 2017 3:45 PM	Scheduled Pt Registration Completed	Cindy Buchanan Oct 18, 1974 (43)	Thomas Freeman, PA-C N/A
Sep 5, 2017 4:42 PM	In Review Pending Prior Authorization	Cindy Buchanan Oct 18, 1974 (43)	Thomas Freeman, MD N/A
Sep 5, 2017 4:42 PM	In Review Pending Medical Records	Cindy Buchanan Oct 18, 1974 (43)	Thomas Freeman, PA-C N/A
Aug 11, 2017 11:10 AM	In Review Pending Prior Authorization	Nicole Amey Jun 4, 1967 (50)	David Marks N/A
Aug 8, 2017 3:17 PM	Accepted Waiting for Lab Results	Julie Cranston Mar 14, 1971 (46)	Sam Smith, MD Bay Area Health System
Aug 8, 2017 3:16 PM	Accepted Waiting for Patient to Schedule	Sam Davidson Feb 5, 1974 (43)	Sam Smith, MD Bay Area Health System
Aug 8, 2017 2:52 PM	Completed Schedule Follow-Up Appt	Mandy Aguilars Jun 28, 1994 (23)	Steven Davidson, MD Healthy Heart Medical Group
Aug 8, 2017 2:06 PM	Scheduled Pt Registration Pending	Heather Abernathy Sep 26, 1978 (39)	Steven Davidson, MD Healthy Heart Medical Group
Aug 8, 2017 10:20 AM	Scheduled Pt Registration Completed	Jenny Johnson May 15, 1970 (47)	Smitha Bullock, M.D.
Aug 8, 2017 10:14 AM	Accepted Waiting for Lab Results	Susan Johnson Jun 29, 1970 (47)	Smitha Bullock, M.D.
Aug 8, 2017 10:02 AM	In Review Pendine Eligibility Verification	Patient Self-Referral	Patient Self-Referral

SENDING CONSULTS & CONFERMED

- ✓ eConsults allow PCPs to confer with specialists to prevent unnecessary referrals
- ✓ Referrals can be automatically converted to consults for certain specialties based on rules
- ✓ In-network specialists can define availability for receiving consults
- ✓ If the network does not offer certain specialties or providers are not available then ConferMED can be used as the default receiver
- ✓ ConferMED's network of 300 specialists represents most pediatric and adult specialties

The screenshot displays the ReferralMD eConsult interface. At the top, there's a search bar and a date range filter set to '01/29/2016 - 12/06/2023'. Below this is a navigation bar with 'RECEIVED' and 'SENT' tabs, and a 'New Consult' button. The main area shows a table of consults with columns for DATE, STATUS, PATIENT, PAYER, CONSULT SENDER, and CONSULT RECEIVER. The table lists several consults, including one from Cindy Buchanan to Steven Davidson and another from Robert Jones to ConferMED.

Below the table is a 'Select Consult Receiver' modal. It shows a progress bar with stages: Patient (Cindy Buchanan), Consult Sender (David Martinez), Consult Receiver (selected), Consult Details, and Final Review. Below the progress bar are filters for GENDER, LANGUAGE, CITY, CARDIOLOGY, PROCEDURE, and CONDITION, along with checkboxes for In-Network, Organizations, and Favorites. A search bar and a 'Back' button are also present.

The modal also displays a list of potential receivers with their names, organizations, and in-network status:

NAME / ORGANIZATION	IN-NETWORK
Steven Davidson, MD Regional Medical Center Cardiology	Yes
Roberta Montgomery, MD Regional Medical Center Cardiology	Yes
ConferMED	No

SENDING REFERRALS & SMARTMATCH

- ✓ SmartMATCH provider scores based on:
 - Network affiliation
 - Accepted insurance plans
 - Distance from patient
 - Average wait time
 - Consult response time
 - Internal provider rating
- ✓ Search for provider by zip code, specialty, condition or procedure
- ✓ Provider profile shows affiliations, specialties, clinical interests, age groups, languages, procedures, education, etc.
- ✓ Custom clinical guidelines per specialty

The screenshot displays the SmartMATCH interface. At the top, a progress bar shows the referral workflow: Patient (Cindy Buchanan), Referring Provider (Steven Davidson), Receiving Provider, Referral Details, and Final Review. Below this, there are filters for 'CARDIOLOGY', 'CITY (ALL)', 'FEMALE', 'LANGUAGE (ALL)', and an 'Affiliated' checkbox. A search bar and a 'Back' button are also present.

The main content area shows a table of providers with the following columns: NAME / ORGANIZATION, SCORE, INSURANCE, COPAY, AFFILIATED, and DISTANCE.

NAME / ORGANIZATION	SCORE	INSURANCE	COPAY	AFFILIATED	DISTANCE
Jennifer Ness, MD Healthy Heart Medical Group Cardiology	95	Accepted	\$60	Yes	0.38 mi
Ololade Akintoye, M.D. Ololade Akintoye Pediatric Cardiology	88				
Norma Allgood, M.D. Norma Allgood Pediatric Cardiology	88				
Kristin Frankel, MD Cardiology	88				
Jinnette Abbott, MD Jinnette Abbott Cardiovascular Disease	88				

On the left, there are sections for 'REFERRAL DETAILS' (Referral Method: Subscriber, Referral Source: Provider), 'PATIENT' (Cindy Buchanan, ID# SWX43995, Oct 18, 1974 (43)), and 'REFERRING PROVIDER (FROM)' (Steven Davidson, MD, Healthy Heart Medical Group, Cardiology).

A 'Provider Details' pop-up window is shown for Jennifer Ness, MD. It includes her photo, name, organization (Healthy Heart Medical Group, Cardiology), NPI (1750388740), and a checked box for 'Accepting new patients'. Below this, statistics are shown: 445 PROFILE VIEWS, 24493 TOTAL PROCEDURES, 7 SENT REFERRALS, and 169 RECEIVED REFERRALS.

The bottom section of the pop-up shows performance metrics: ACCESS (Average wait times: 6 days, score 95), CONSULTS (Average response time: 7 days), and RATING (Average staff rating: 4 stars, 4 reviews).

AUTOMATED PRIOR AUTHORIZATIONS

- ✓ Automated prior authorizations solution planned for release in Q1-2024
- ✓ Partnering with leading clearinghouse and authorizations service provider for maximum payer coverage
- ✓ Automatically send referral and prior authorization requests to payers
- ✓ Authorization status updates are available in the work queue in real-time
- ✓ Referral statuses updated automatically based on payer responses
- ✓ Authorization requests to payers triggered a defined number of days before patient appointments



COMING SOON

Prior authorization	Referrals
REQUESTS COVERAGE FOR	
<ul style="list-style-type: none">• Medication• Service• Treatment	<ul style="list-style-type: none">• Specialist visit• Specialized medical service

SECURE MESSAGE & FILE EXCHANGE

- ✓ Online messaging eliminates the need for phone calls and faxes
- ✓ Securely exchange messages and files (CCDAs, dicoms, test results, progress notes, etc.) related to consults and referrals
- ✓ Patient files from the EHR are available to be attached or new files can be uploaded
- ✓ Green dot icon indicates when users are online
- ✓ Users notified online when messages or files arrive or via email when not online

The screenshot displays a secure messaging interface. The top section, titled "All Messages", shows a list of messages on the left and a detailed view of a message on the right. The detailed view is for a "Referral for Robert Jones" dated March 30, 2023, with 4 members. It shows messages from Eric Ramirez (1:32 PM MST) asking for lab results, and Steven Davidson (11:02 AM MST) asking for an insurance card. A "Today" section shows Steven Davidson asking for the latest labs and then uploading a file. The bottom section, titled "Consult Details", shows details for a consult for Julie Brothers (ID# KJP92983). It includes the consult status (New), reason (47-year-old woman with coronary art...), priority (Urgent (8 Hours)), patient information (Julie Brothers, Jul 6, 1975 (48), (415) 983-9121 Main, julie@gmail.com), family/guardian, and consult sender (Matthew Holtz, MD, Regional Medical Center). The right side of the consult details shows a message from Steven Davidson (12:52 PM MST) asking for the latest test results, and another from Steven Davidson asking for the last MRI report. A PDF attachment titled "Cardiology Consult Report.pdf" (715 KB) is shown, with a preview of the report header and patient information.

CRM FOR ACTIVITY TRACKING

- ✓ Use built-in CRM to document all activity such as logging notes, calls, emails and meetings
- ✓ Exchange messages and files with external providers
- ✓ Manage tasks associated with consults, referrals or contacts
- ✓ View all files associated with consults or referrals
- ✓ Track marketing activities by marketing representative across referral partners

The image displays two overlapping screenshots of a CRM interface. The top screenshot shows a 'Referrals' page for a specific referral (ID# ZWC33365). It includes a 'REFERRAL DETAILS' sidebar with fields for Referral Status (New), Reason for referral (Syncope; Headache), Urgency (Same day (Urgent)), Date/Time Received (December 10, 2016 at 3:41 PM), Referral Method (Subscriber), and Referral Source (Provider). The main area shows an 'ACTIVITY' tab with a rich text editor for adding notes and a list of activities, including an email sent by Steven Davidson on 09/18/2017 at 10:00 AM with the subject 'Emailed patient with instructions for first appointment'.

The bottom screenshot shows a 'CRM Activity' report table for the period 01/01/2017 - 04/07/2020. The table tracks activity for Sally Thompson across various referral partners, including ABC Clinic - Nashville, Phillip Aaron, MD, Cardiology Associates Medical Group, and Susan Russell. The columns include Owner, Referral Partners, Total Activity, Calls, Emails, Texts, Faxes, Mail, Meetings, Notes, Tasks, and Lead Source.

OWNER	REFERRAL PARTNERS	TOTAL ACTIVITY	CALLS	EMAILS	TEXTS	FAXES	MAIL	MEETINGS	NOTES	TASKS	LEAD SOURCE
Sally Thompson	ABC Clinic - Nashville	14	3	2	0	0	0	3	6	0	
	Phillip Aaron, MD	14	3	2	0	0	0	3	6	0	2020-03-20 Luncheon Event
	Cardiology Associates Medical Group	2	0	0	0	0	0	1	0	1	2020-01-18 Blast Email Campaign
	Phillip Aaron, MD	14	3	2	0	0	0	3	6	0	2020-03-20 Luncheon Event
	Susan Russell	2	2	0	0	0	0	0	0	0	2020-03-05 Dinner Event

FAX MANAGEMENT

- ✓ Port existing fax numbers so faxes flow into system
- ✓ Assign faxes to individuals or groups to be processed
- ✓ Categorize faxes such as new referrals, medical records or other document types
- ✓ Label medical records such lab results, discharge summaries, etc. and have documents flow into EHR without scanning
- ✓ Add notes and update status as documents are processed

The image shows a software interface for managing faxes. On the left is a 'FAX INFORMATION' panel for ID# UNG69367. It includes fields for Status (NEW), Type (NEW REFERRAL), Owner (STEVEN DAVIDSON), Department (GENERAL CARDIOLOGY), Date/Time Received (November 27, 2017 at 4:44 PM), Fax# (316) 555-1234, File Name (fax6300402.pdf), and Description (Faxed from number 1 (316) 555-1234). Below this is a 'PATIENT' section for ID# ZUZ35442, listing Katherine Montgomery (Jun 8, 1962 (55)). Further down are sections for 'REFERRING PROVIDER (FROM)' (Lawrence Livingston, MD) and 'RECEIVING PROVIDER (TO)'. On the right is a scanned 'University Cardiology Patient Referral Form' from the University of South Carolina School of Medicine. The form includes the University of South Carolina logo, address (2 Medical Park, Suite 506), and contact info. Handwritten entries include DATE: 4/1/16, REFERRING DR.: Lakny Livingston MD, and PATIENT'S NAME: Katherine Montgomery. The form also has sections for SYMPTOMS, DIAGNOSIS, and REQUESTED SERVICES, each with a list of checkboxes.

FAX INFORMATION ID# UNG69367

Status
NEW

Type
NEW REFERRAL

Owner
STEVEN DAVIDSON

Department
GENERAL CARDIOLOGY

Date/Time Received
November 27, 2017 at 4:44 PM

Fax#
(316) 555-1234

File Name
fax6300402.pdf

Description
Faxed from number 1 (316) 555-1234

PATIENT ID# ZUZ35442

Katherine Montgomery
Jun 8, 1962 (55)

REFERRING PROVIDER (FROM)

Lawrence Livingston, MD

RECEIVING PROVIDER (TO)

University Specialty Clinics
UNIVERSITY OF SOUTH CAROLINA SCHOOL OF MEDICINE

University Cardiology Patient Referral Form
2 Medical Park, Suite 506
Phone: (803) 540-1000 Fax: (803) 540-1011

DATE: 4/1/16
REFERRING DR.: Lakny Livingston MD
PATIENT'S NAME: Katherine Montgomery
REASON (or check boxes below):

SYMPTOMS (Check all that apply)

<input checked="" type="checkbox"/> Chest Pain	<input checked="" type="checkbox"/> Dyspnea	<input type="checkbox"/> Abnormal EKG
<input type="checkbox"/> Syncope	<input checked="" type="checkbox"/> Palpitations	<input type="checkbox"/> Weakness/Malaise
<input type="checkbox"/> Murmur	<input type="checkbox"/> Visual Disturbance	<input type="checkbox"/> Headache

DIAGNOSIS (Check all that apply)

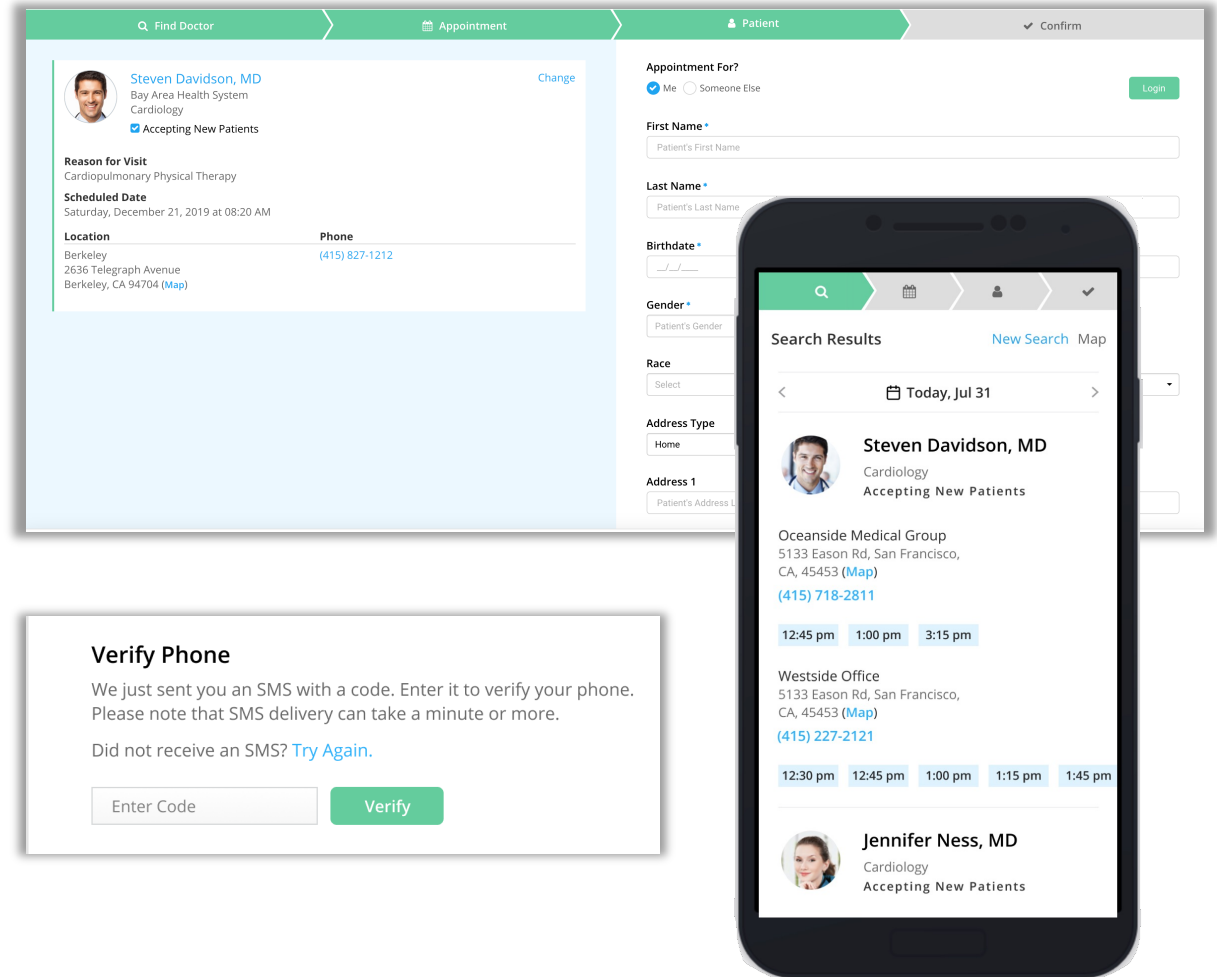
<input type="checkbox"/> Coronary Disease	<input type="checkbox"/> Heart Failure	<input type="checkbox"/> Tachycardia
<input type="checkbox"/> Bradycardia	<input type="checkbox"/> Vascular Disease	<input checked="" type="checkbox"/> Hypertension
<input type="checkbox"/> Lipid Disorder	<input type="checkbox"/> Metabolic Syndrome	
<input checked="" type="checkbox"/> Diabetes Mellitus	<input type="checkbox"/> Congenital Heart Disease	

REQUESTED SERVICES (Check all that apply)

<input checked="" type="checkbox"/> Cardiology Evaluation	<input checked="" type="checkbox"/> Echocardiogram
<input type="checkbox"/> Exercise Treadmill Test	<input type="checkbox"/> Holter Monitor
<input checked="" type="checkbox"/> ECG/EKG	<input type="checkbox"/> Nuclear Stress Test

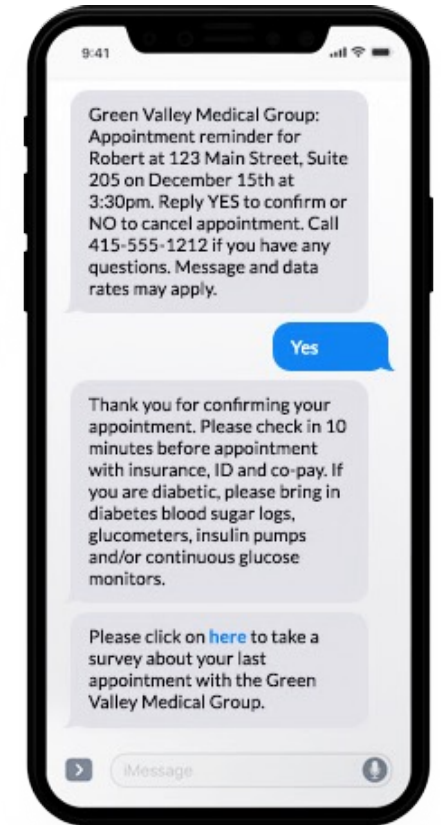
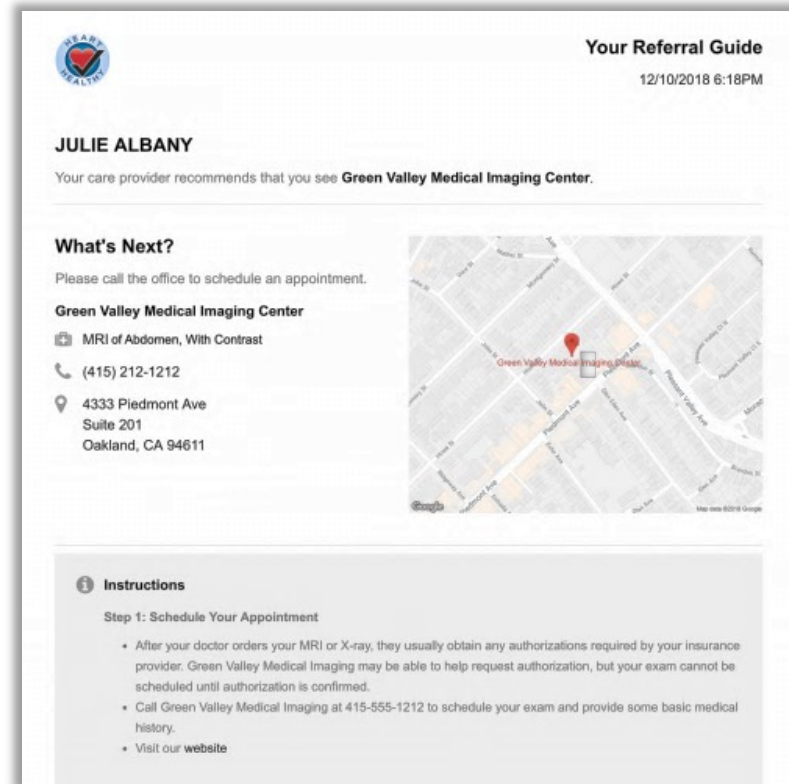
PATIENT SCHEDULING

- ✓ Improve patient access by offering patients an easier way to find doctor based on specialty, insurance, location, condition, procedure and more
- ✓ Simple process: patients choose the provider and location, select appointment date/time, enter their personal information and verify their mobile number
- ✓ Patients can confirm their appointments and receive appointment status updates via text message or email
- ✓ Primary care provider offices can also use the book appointment functionality to schedule appointments for their patients



PATIENT COMMUNICATIONS

- ✓ Rules can be defined to automatically send appointment instructions, reminders and follow-up communications to patients via text or email messages
- ✓ Templates for automated messages can be customized and assigned to locations
- ✓ Multiple appointment reminders can be sent until appointments are confirmed
- ✓ Patients can confirm, cancel or reschedule appointments directly from text or email message which are sent to the EHR/RIS
- ✓ Automated follow-up messages can include post-visit survey links or reminders to reschedule no-show appointments



DIRECTORY INCLUDES 7M+ PROVIDERS

- ✓ Explore referral networks for over 7 million providers in the system
- ✓ Research potential referral partners and copy profiles to your Contacts list so outreach activity can be tracked
- ✓ Self-service tool to update staff and provider profiles for improved customer service and marketing
- ✓ Accept referrals and patient appointment requests directly from your website
- ✓ Increase visibility on major search engines to patients

LOCATIONS

Berkeley
2636 Telegraph Avenue Suite 302, Ber...
(415) 827-1212

Oakland
4333 Piedmont Avenue Suite 201, Oa...
(415) 212-1212

San Francisco
1825 4th Street Suite 101, San Francis...
(800) 233-2771

COLLEAGUES

- Jenny Edwards
Healthy Heart Medical Group
- Rick Hammer, MD
Healthy Heart Medical Group
Cardiology
- Frank Jones
Healthy Heart Medical Group

[LOAD MORE](#)

ACCEPTED PLANS
Insurance Providers

- Kaiser Permanente
- Self-Pay
- Aetna
- Cigna Healthcare
- Humana Insurance Company

[LOAD MORE](#)

Steven Davidson, MD
Healthy Heart Medical Group
Cardiology

Flag as Non-Affiliated Add Contact Send Referral

NPI: 1164425443 Accepting new patients

1029 PROFILE VIEWS 3285 TOTAL PROCEDURES 101 SENT REFERRALS 95 RECEIVED REFERRALS

ACCESS
Average wait times: 90 days (Low, Medium, High)

CONSULTS
Average response time: (Low, Medium, High)

RATING
Average staff rating: (5 stars)

BIOGRAPHY
Steven Davidson is a cardiologist specializing in echocardiography and its relationship between noninvasive testing in cardiology and its treatment strategies in acute ischemic syndromes, and the effect of heart failure and acute ischemic syndromes. Dr. Davidson earned his Medical Degree in St. Louis, MO. He went on to receive a Masters in Public Health from UCSF, where he is a professor and an attending physician.

LANGUAGES

- English
- Spanish

SPECIALTIES

- Cardiology

CLINICAL INTERESTS

- Echocardiography and noninvasive testing
- Diagnostic & treatment strategies in acute ischemic syndromes
- Effect of secondhand smoke on cardiovascular health

EDUCATION & EXPERIENCE

- Washington University School of Medicine (1995)

HONORS AND AWARDS

- Masters in public health - (2002)

COMMON PROCEDURES

PROCEDURE NAME	PERFORMED	INDIVIDUAL PATIENTS	MEDICARE CHARGE *
Electrocardiogram report	1,473	1,025	\$32.10
Office/outpatient visit est	215	156	\$140.11
Subsequent hospital care	215	132	\$100.58
Tte w/doppler complete	177	176	\$208.11

[LOAD MORE](#)

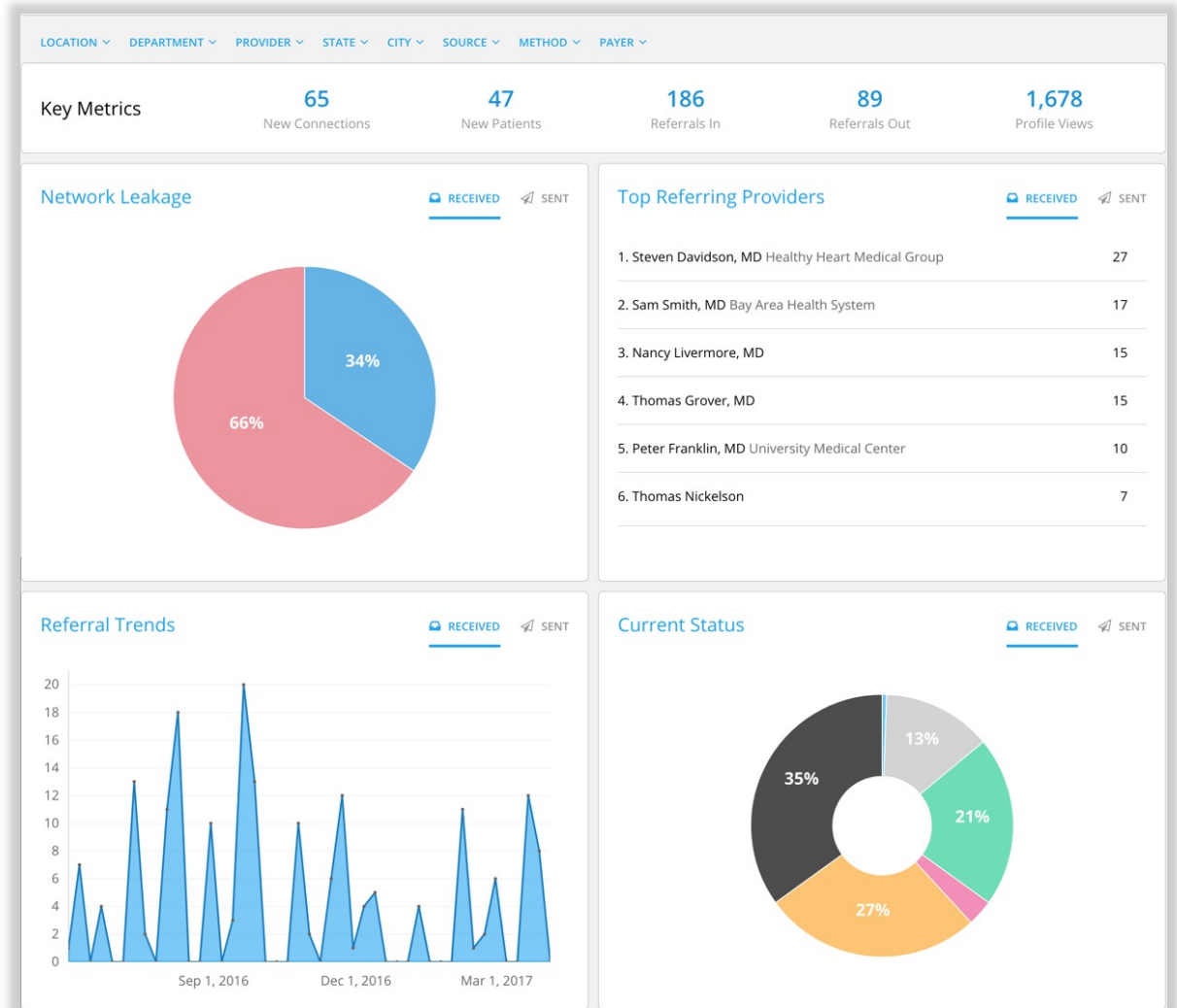
Source: Center for Medicare & Medicaid Services
* The average price charged to Medicare for the procedure by the provider

NETWORK

Henry Cooke, MD University Medical Center Primary Care	5 Received 2 Sent	Peter Franklin, MD University Medical Center Primary Care	1 Received 7 Sent
David Marks Bay Area Health System Neuroradiology	2 Received 0 Sent	Jennifer Ness, MD Healthy Heart Medical Group Cardiology	35 Received 0 Sent
Tracey Orrell University Medical Center General Care	0 Received 0 Sent	Mark Sammy Bay Area Health System Neuroradiology	0 Received 0 Sent
Sam Smith, MD Bay Area Health System Oncology	4 Received 16 Sent	Mark Tomason, MD University Medical Center Primary Care	0 Received 1 Sent

ADVANCED ANALYTICS

- ✓ Dashboards
- ✓ Automated Reports
- ✓ Productivity
- ✓ Volume
- ✓ Trends
- ✓ Distribution Map
- ✓ Activity Analysis
- ✓ Process Time
- ✓ Leakage Rates
- ✓ No Show Rates
- ✓ And More...



**Scan Here to
Contact Us Now**



Email	info@getreferralmd.com
Phone	(800) 343-3729
Web	GetReferralMD.com
Social	   @ReferralMD

**We Look Forward to
Speaking with You Soon!**