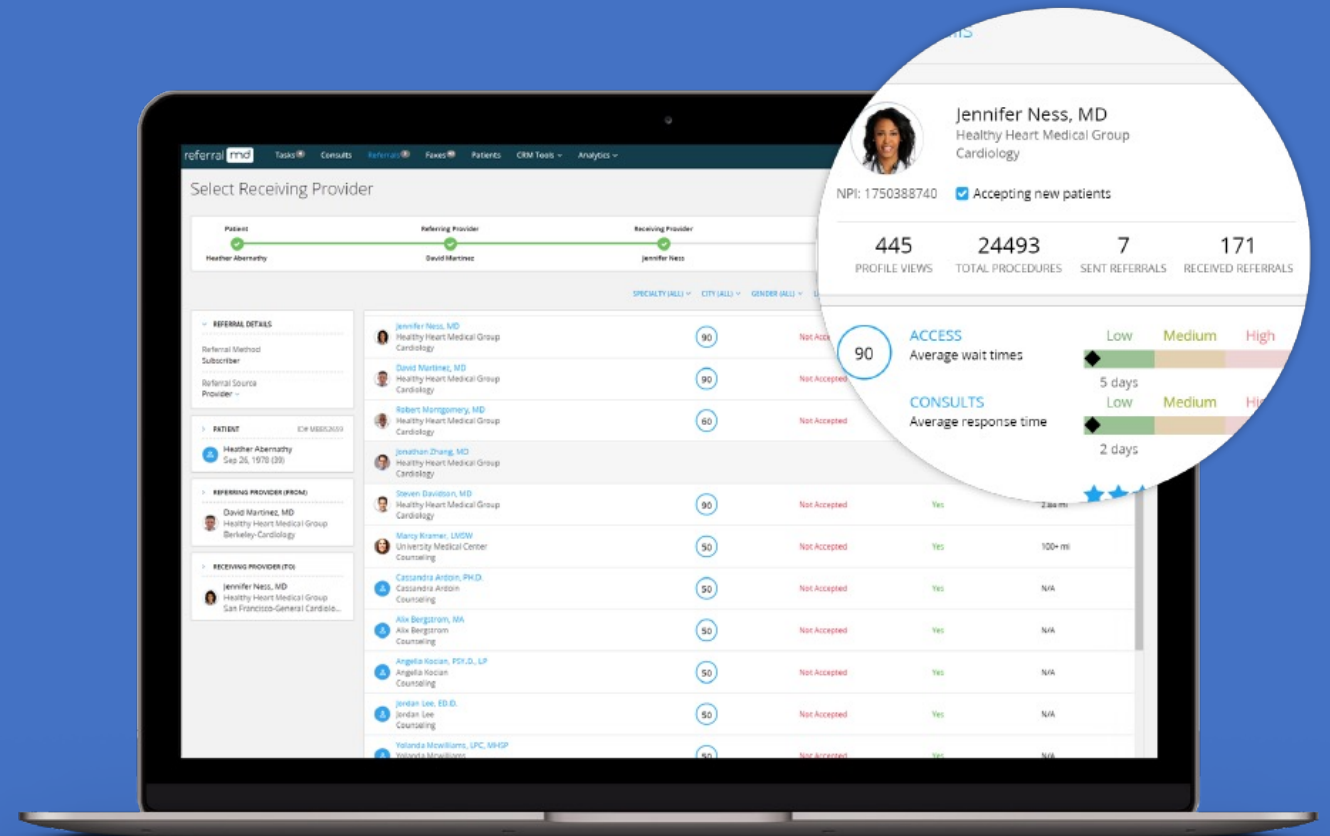




A Better Way To Manage Your Provider Referral Network



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

RECEIVED

SENT

All273

New2

In Review58

- Pending Eligibility Verification13
- Pending Prior Authorization11
- Pending Medical Records12
- Pending Physician Review11

Accepted56

- Call Patient to Schedule Appt14
- Call Patient to Schedule Tests12
- Waiting for Lab Results14
- Waiting for Patient to Schedule16

Declined6

Scheduled55

- Pt Registration Completed2
- Pt Registration Pending2

Completed96

- Schedule Follow-Up Appt4

No Show0

- Call Patient to Reschedule0
- Appointments Rescheduled0

Archived






































DEPARTMENT (ALL)

Urgent (8)

Alerts (9+)

Tasks (4)

Search

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 Aguilar 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 Pending 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. The top section, titled "Consults", features a search bar, a date range filter (01/29/2016 - 12/06/2023), and toggle switches for Alerts, Tasks, and Messages. A "New Consult" button is located in the top right. Below this is a table of consults with columns for DATE, STATUS, PATIENT, PAYER, CONSULT SENDER, and CONSULT RECEIVER. The table lists four consults, with the first three marked as "Drafts" and the last one as "New".

The bottom section, titled "Select Consult Receiver", shows a progress bar with five steps: 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 "CONSULT DETAILS" section on the left shows the following information:

- Consult Status: Drafts (Not Processed)
- Specialty: Cardiology
- Owner: Steven Davidson
- Consult Method: Account

The "NAME / ORGANIZATION" section on the right lists the following providers and their 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 workflow: Patient (Cindy Buchanan), Referring Provider (Steven Davidson), Receiving Provider (highlighted), Referral Details, and Final Review. Below this, filters for CARDIOLOGY, CITY (ALL), FEMALE, and LANGUAGE (ALL) are visible, along with a search bar and a 'Back' button. The main section is a table of providers with columns for NAME / ORGANIZATION, SCORE, INSURANCE, COPAY, AFFILIATED, and DISTANCE. The table lists five providers, with Jennifer Ness, MD having the highest score of 95. A 'Provider Details' pop-up for Jennifer Ness, MD is shown on the right, displaying her profile, NPI, and statistics: 445 profile views, 24493 total procedures, 7 sent referrals, and 169 received referrals. Below the statistics, there are three sections: ACCESS (Average wait times, 6 days), CONSULTS (Average response time, 7 days), and RATING (Average staff rating, 4 reviews).

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				

Provider Details: Jennifer Ness, MD
Healthy Heart Medical Group
Cardiology
NPI: 1750388740
Accepting new patients

445 PROFILE VIEWS
24493 TOTAL PROCEDURES
7 SENT REFERRALS
169 RECEIVED REFERRALS

95 ACCESS
Average wait times: 6 days (Low to High scale)

CONSULTS
Average response time: 7 days (Low to High scale)

RATING
Average staff rating: 4 (Reviews (4))

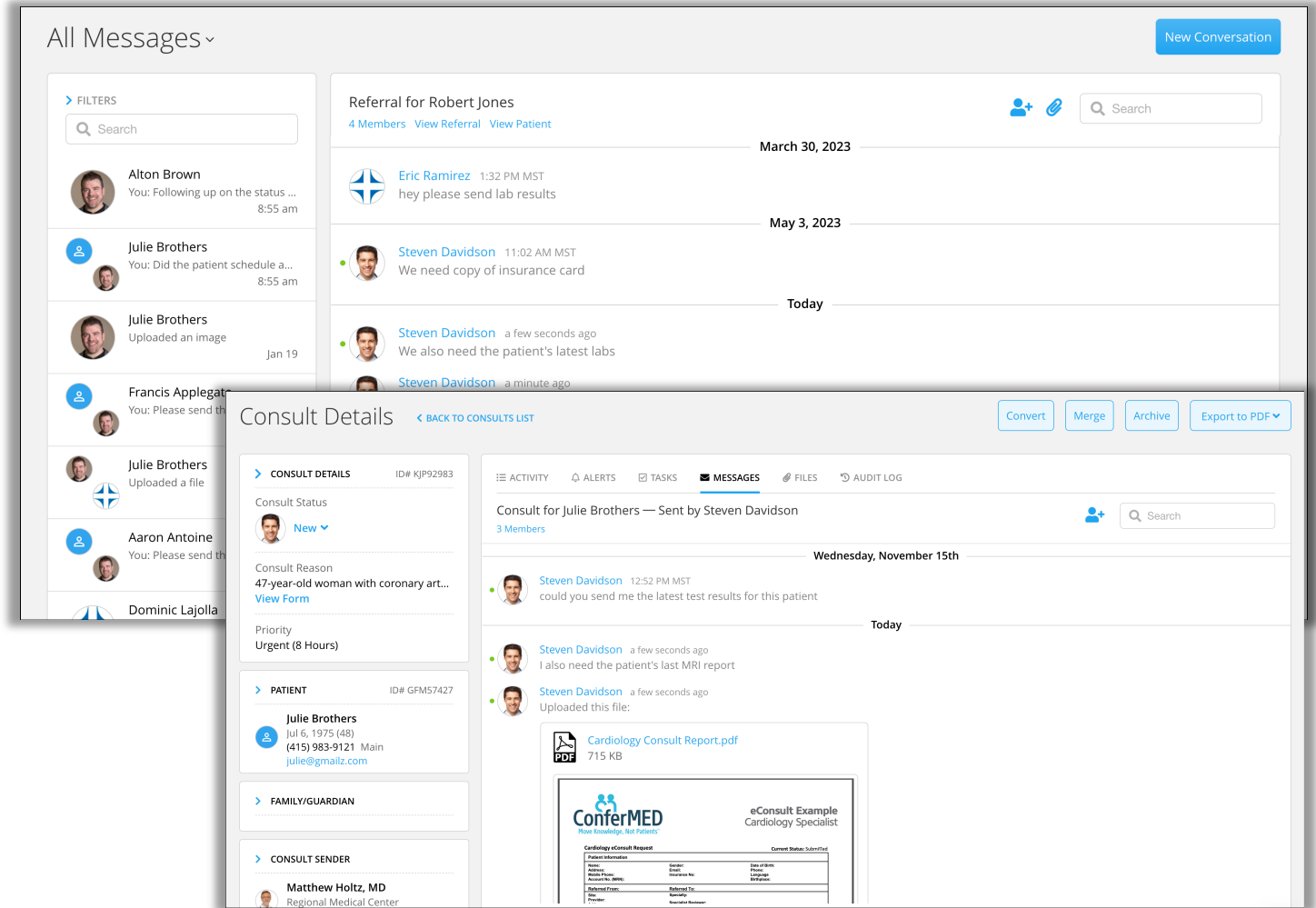
AUTOMATED PRIOR AUTHORIZATIONS

- ✓ 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



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



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 screenshot displays the Referral MD CRM interface. The top section shows a 'Referrals' view for a specific referral (ID# ZWC33365). It includes a 'Referral Details' sidebar with fields like '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 a 'September 2017' activity log with a note from Steven Davidson: 'Steven Davidson logged an email to 09/18/2017 at 10:00 AM. Emailed patient with instructions for first appointment.' Below this is a 'CRM Activity' table showing activity for Sally Thompson across various referral partners.

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 screenshot displays the 'referral.md' fax management interface. On the left, a sidebar shows details for a specific fax (ID# UNG69367) and the associated patient (ID# ZUZ35442). The fax details include its status (NEW), type (NEW REFERRAL), owner (STEVEN DAVIDSON), department (GENERAL CARDIOLOGY), and receipt date/time (November 27, 2017 at 4:44 PM). The patient information lists Katherine Montgomery, born June 8, 1962. The referring provider is Lawrence Livingston, MD. The fax description is 'Faxed from number 1 (316) 555-1234'. On the right, a scanned image of a 'University Cardiology Patient Referral Form' is shown. The form includes the University of South Carolina School of Medicine logo and contact information. It contains handwritten entries for the date (4/1/16), referring doctor (LARRY LIVINGSTON MD), and patient name (Katherine Montgomery). The 'SYMPTOMS' section has checkboxes for Chest Pain, Dyspnea, Abnormal EKG, Syncope, Palpitations, Weakness/Malaise, Murmur, Visual Disturbance, and Headache. The 'DIAGNOSIS' section has checkboxes for Coronary Disease, Heart Failure, Tachycardia, Bradycardia, Vascular Disease, Hypertension, Lipid Disorder, Metabolic Syndrome, Diabetes Mellitus, and Congenital Heart Disease. The 'REQUESTED SERVICES' section has checkboxes for Cardiology Evaluation, Echocardiogram, Exercise Treadmill Test, Holter Monitor, ECG/EKG, and Nuclear Stress Test.

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

DATE: 4/1/16
REFERRING DR.: LARRY 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

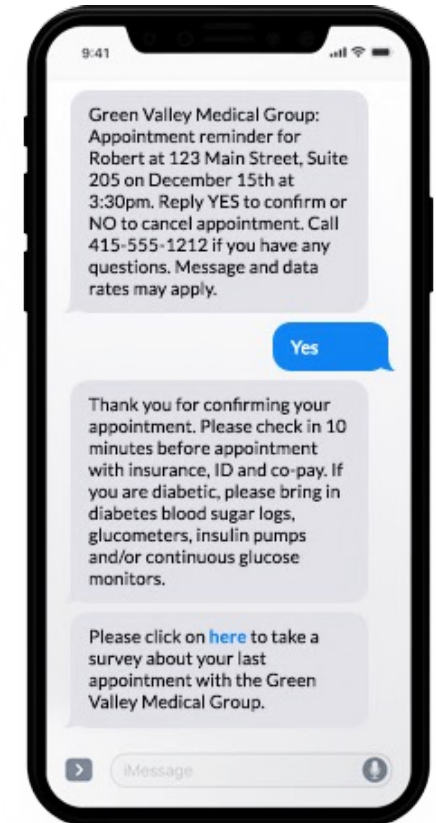
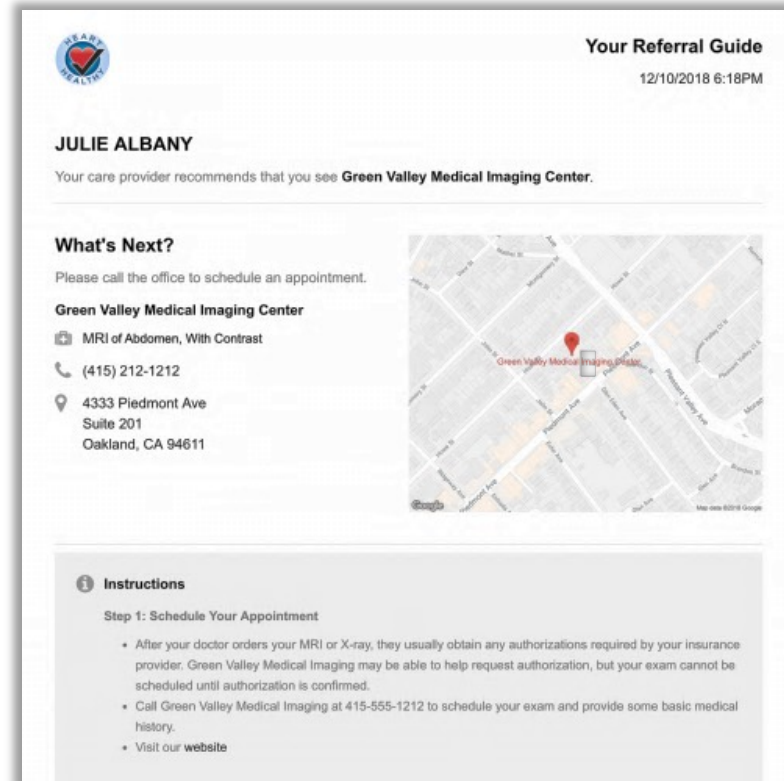
- ✓ Improve patient access by offering patients an easier way to find doctor based on specialty, insurance, location, condition, procedure and more
- ✓ Simple process: patients choose the provider and location, select appointment date/time, enter their personal information and verify their mobile number
- ✓ 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

The image displays two screenshots of a patient scheduling application. The top screenshot is a desktop view showing a doctor's profile for Steven Davidson, MD, a Bay Area Health System Cardiologist. It includes fields for 'Reason for Visit', 'Scheduled Date' (Saturday, December 21, 2019 at 08:20 AM), 'Location' (Berkeley, 2636 Telegraph Avenue), and 'Phone' ((415) 827-1212). To the right is a form for patient information, including 'Appointment For?' (Me/Someone Else), 'First Name', 'Last Name', 'Birthdate', 'Gender', 'Race', 'Address Type' (Home), and 'Address 1'. A 'Confirm' button is visible at the top right. The bottom screenshot is a smartphone view showing 'Search Results' for Steven Davidson, MD, with his location (Oceanside Medical Group, 5133 Eason Rd, San Francisco, CA, 45453) and phone number ((415) 718-2811). It also shows appointment times (12:45 pm, 1:00 pm, 3:15 pm) and another doctor, Jennifer Ness, MD, with her location (Westside Office, 5133 Eason Rd, San Francisco, CA, 45453) and phone number ((415) 227-2121).

The 'Verify Phone' screen displays the instruction: 'We just sent you an SMS with a code. Enter it to verify your phone. Please note that SMS delivery can take a minute or more.' Below this, it says 'Did not receive an SMS? Try Again.' and features an 'Enter Code' input field and a green 'Verify' button.

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

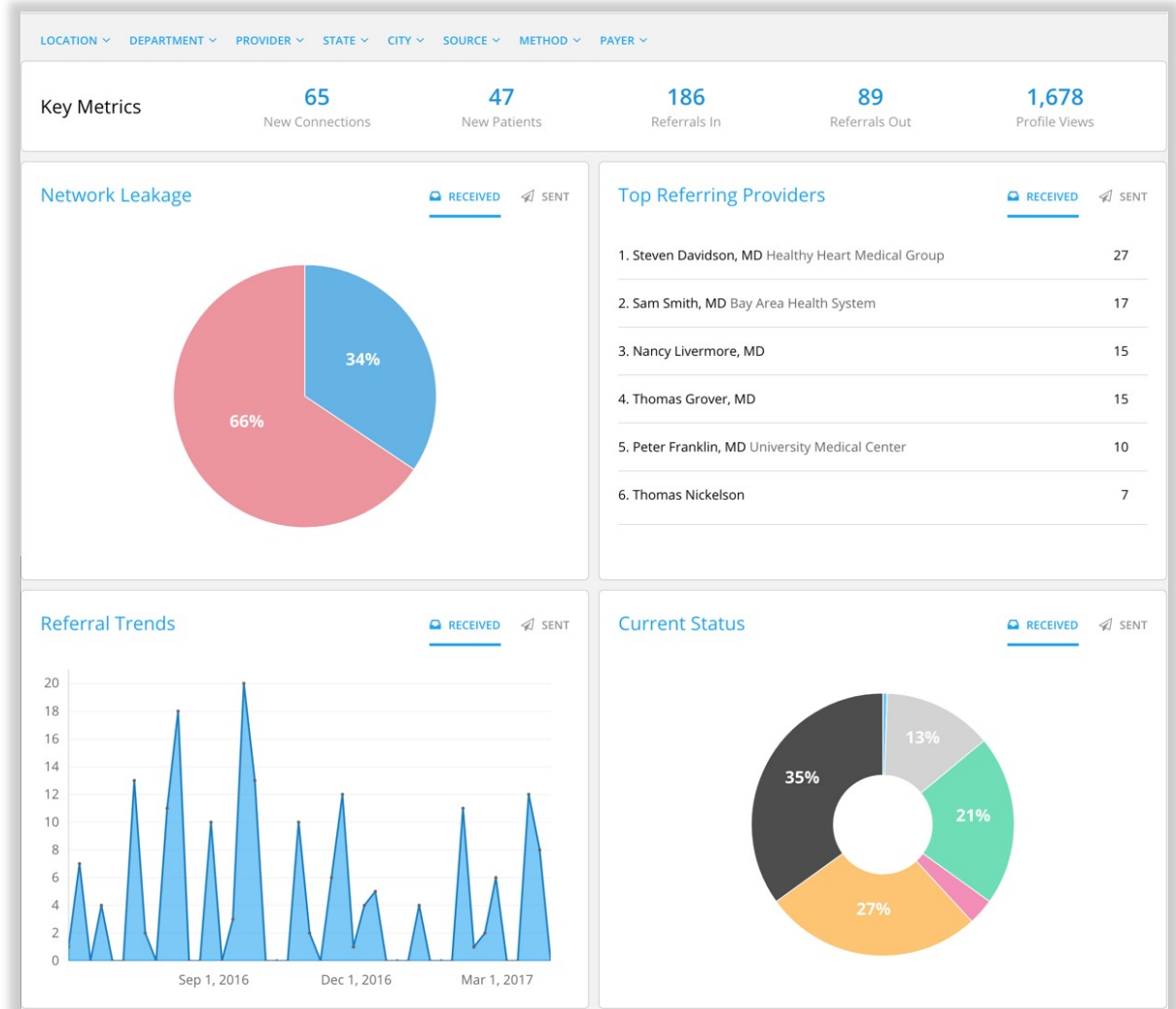
The screenshot displays a detailed profile for Steven Davidson, MD, a cardiologist at Healthy Heart Medical Group. The profile includes contact information for three locations (Berkeley, Oakland, San Francisco), a list of colleagues (Jenny Edwards, Rick Hammer, Frank Jones), and accepted insurance plans (Kaiser Permanente, Aetna, Cigna, Humana). Key performance indicators are shown: 1029 profile views, 3285 total procedures, 101 sent referrals, and 95 received referrals. A 'COMMON PROCEDURES' table lists services like Electrocardiogram report and Office/outpatient visit. A 'NETWORK' section lists other providers such as Henry Cooke, MD and Peter Franklin, MD, along with their referral counts.

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

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

ADVANCED ANALYTICS

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



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