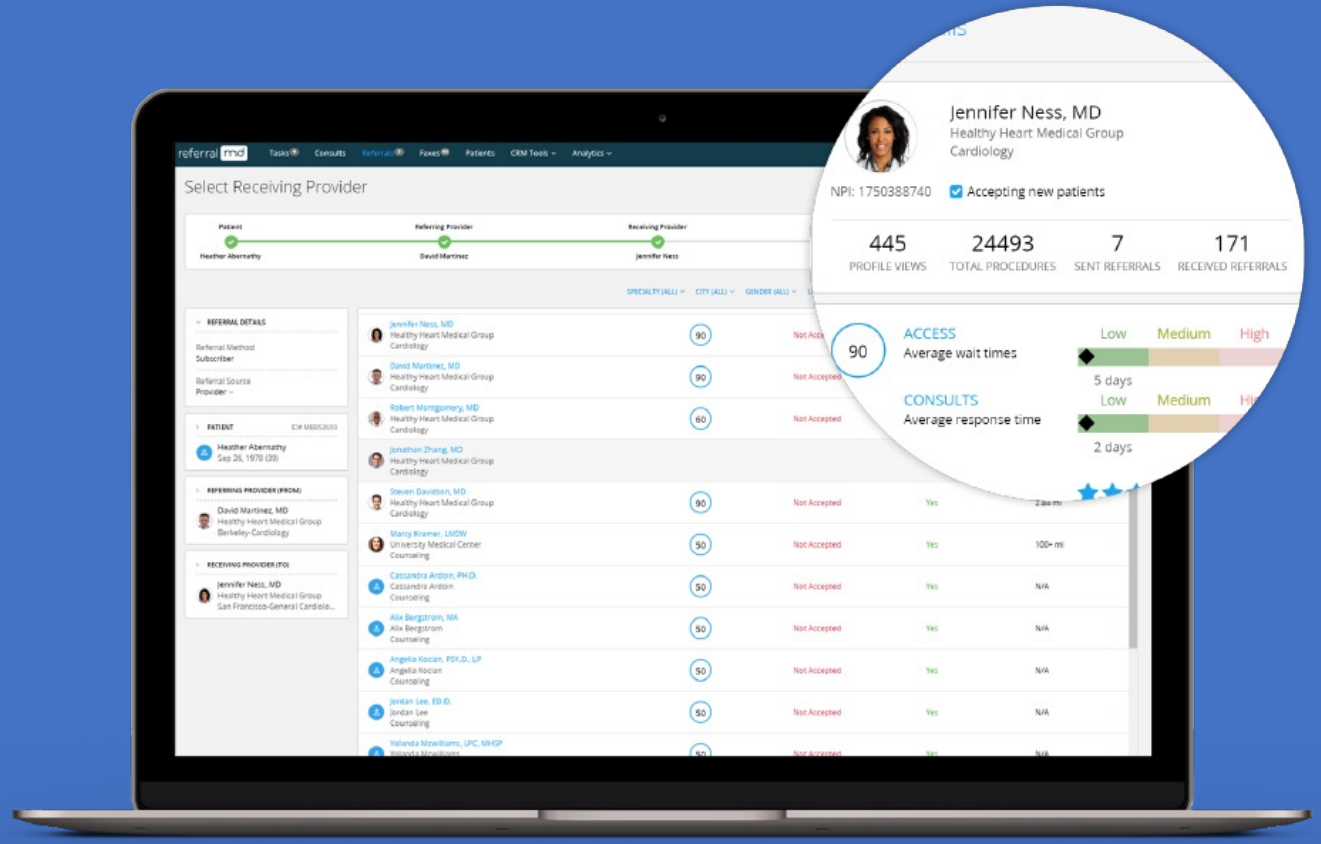
referral md

Transforming Value Based Care Coordination



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

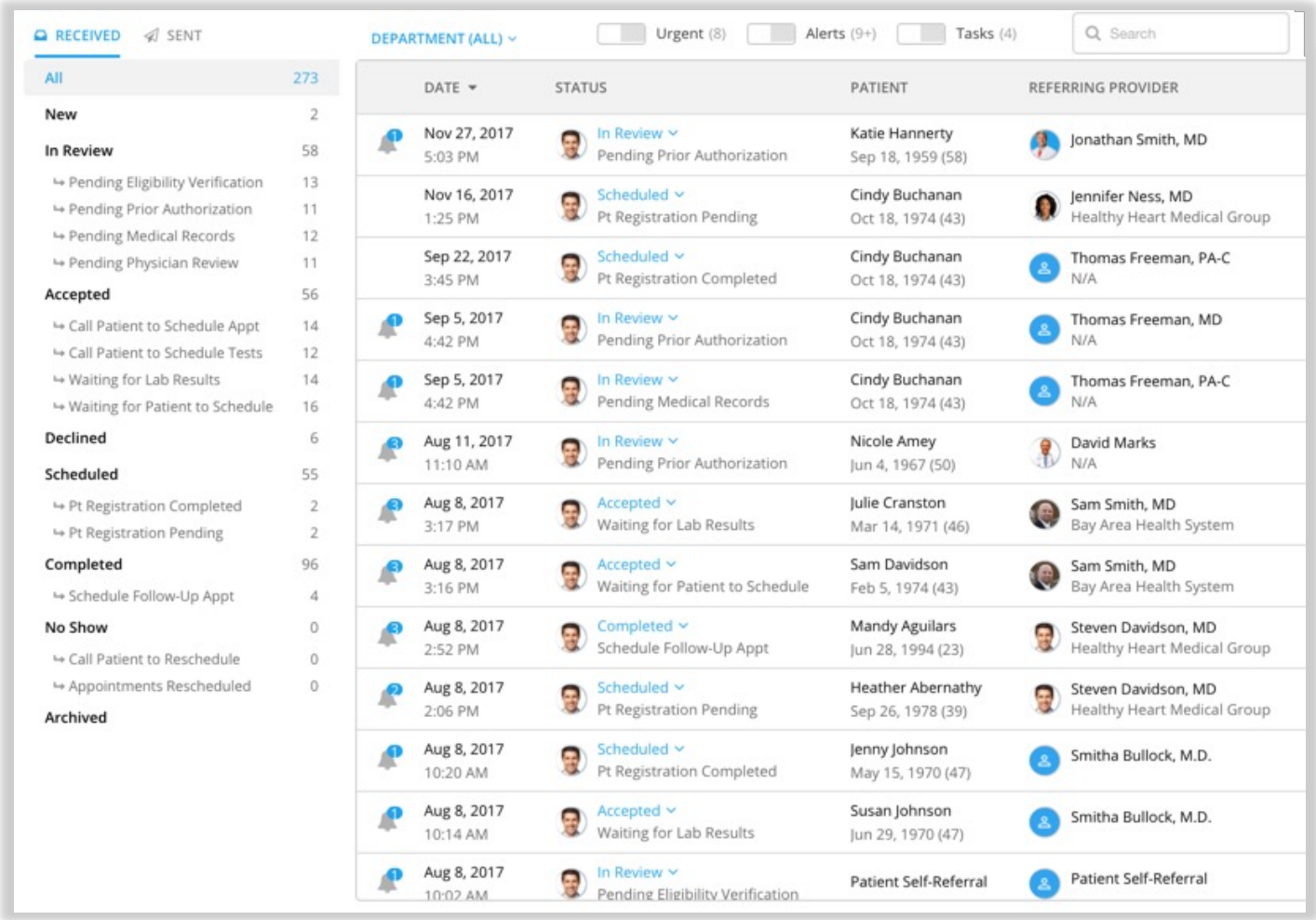
** Transaction fees may apply in addition to annual subscription*

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

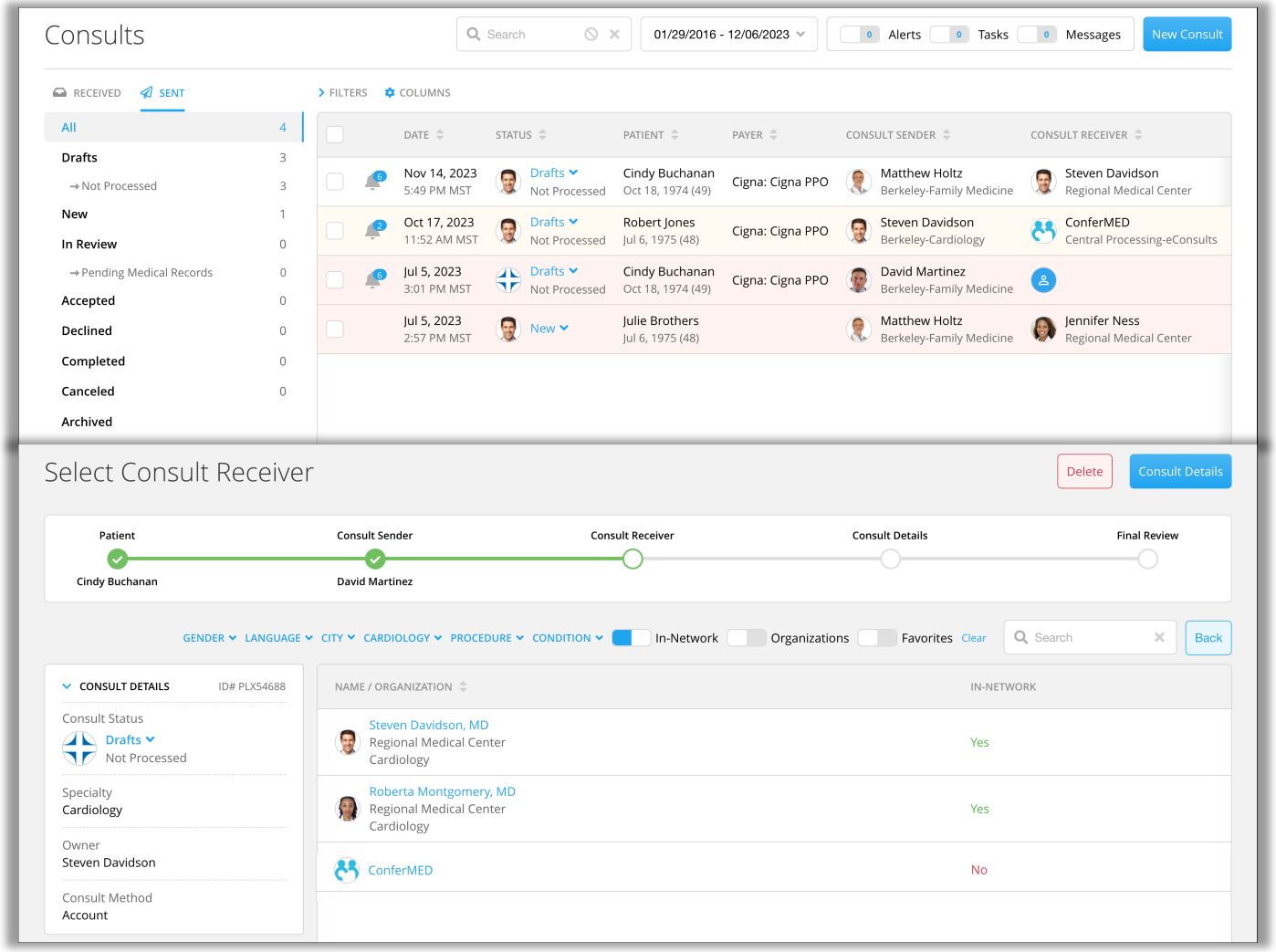
Consult & Referral Management

- ✓ 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



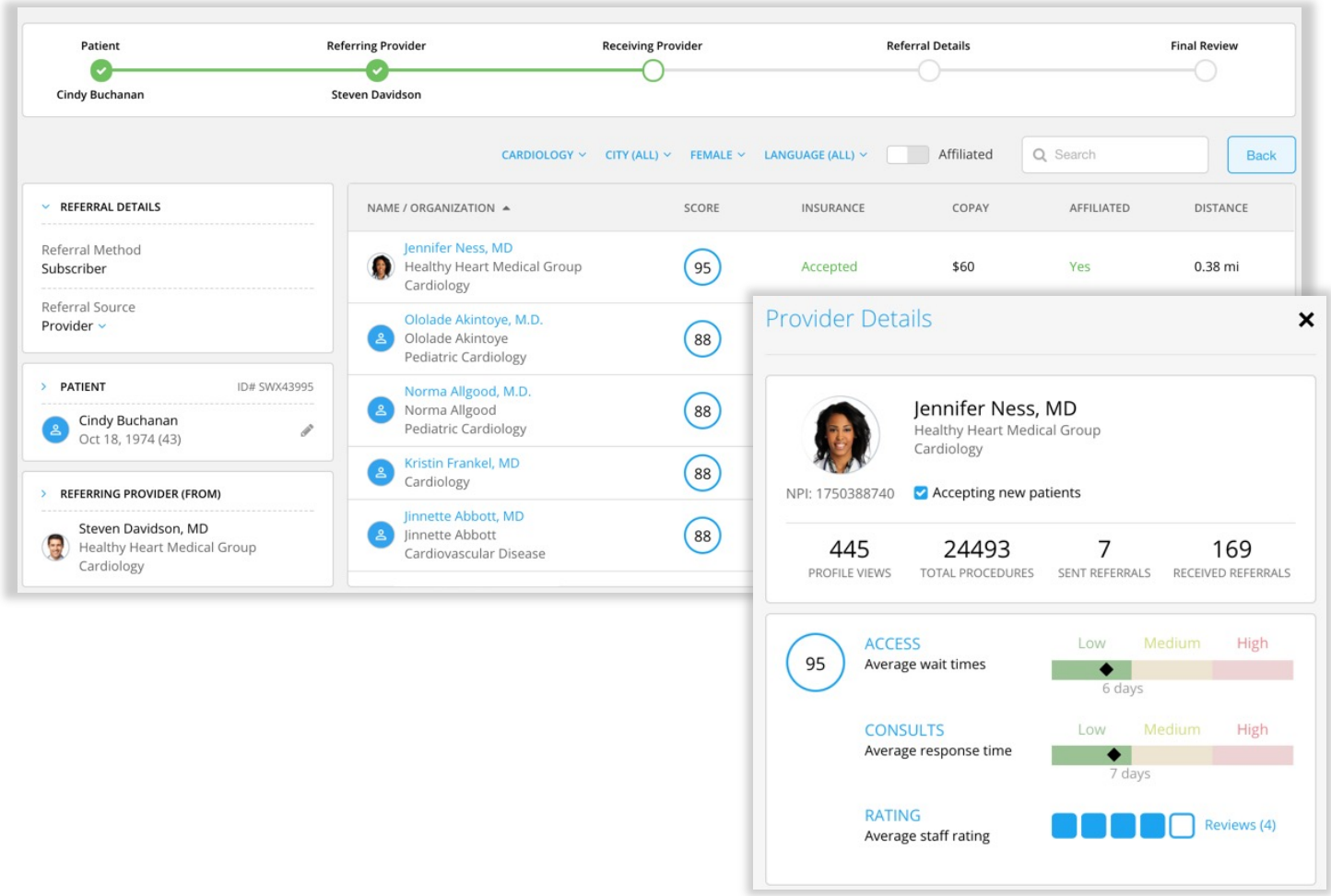
Sending Consults & ConferMed

- ✓ 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



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

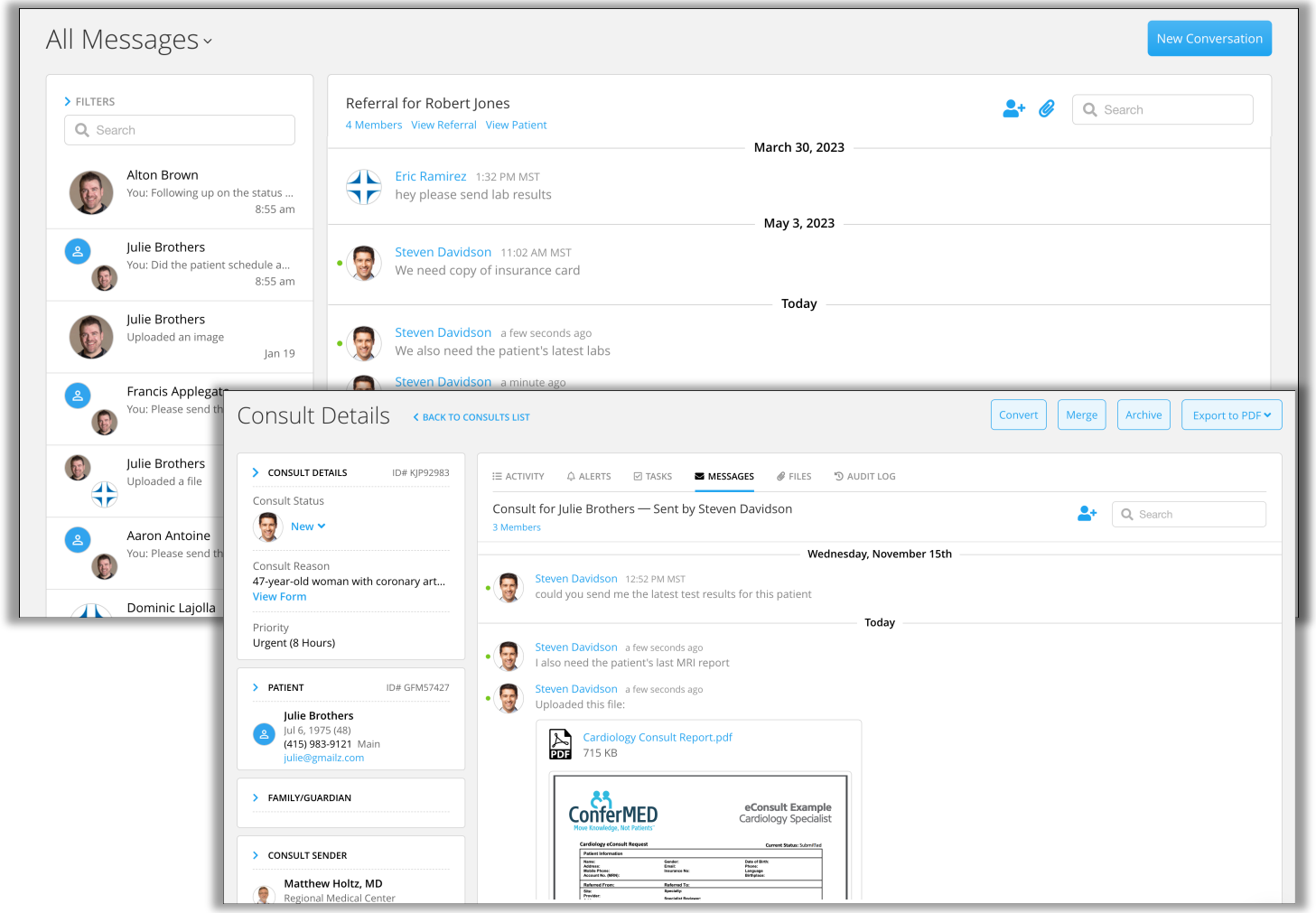


Automated Prior Authorizations

- ✓ 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

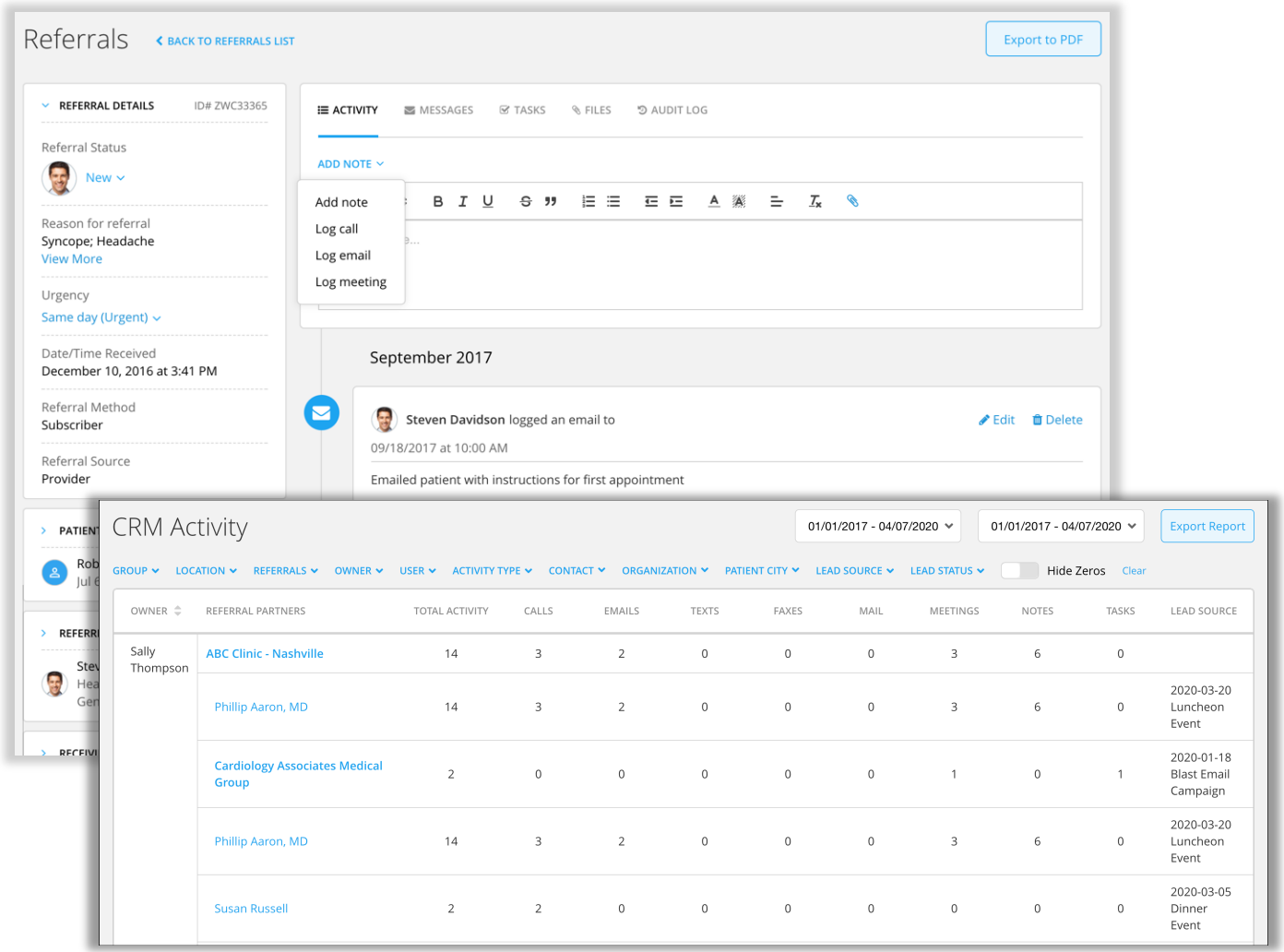
Secure Message & File Exchange

- ✓ 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



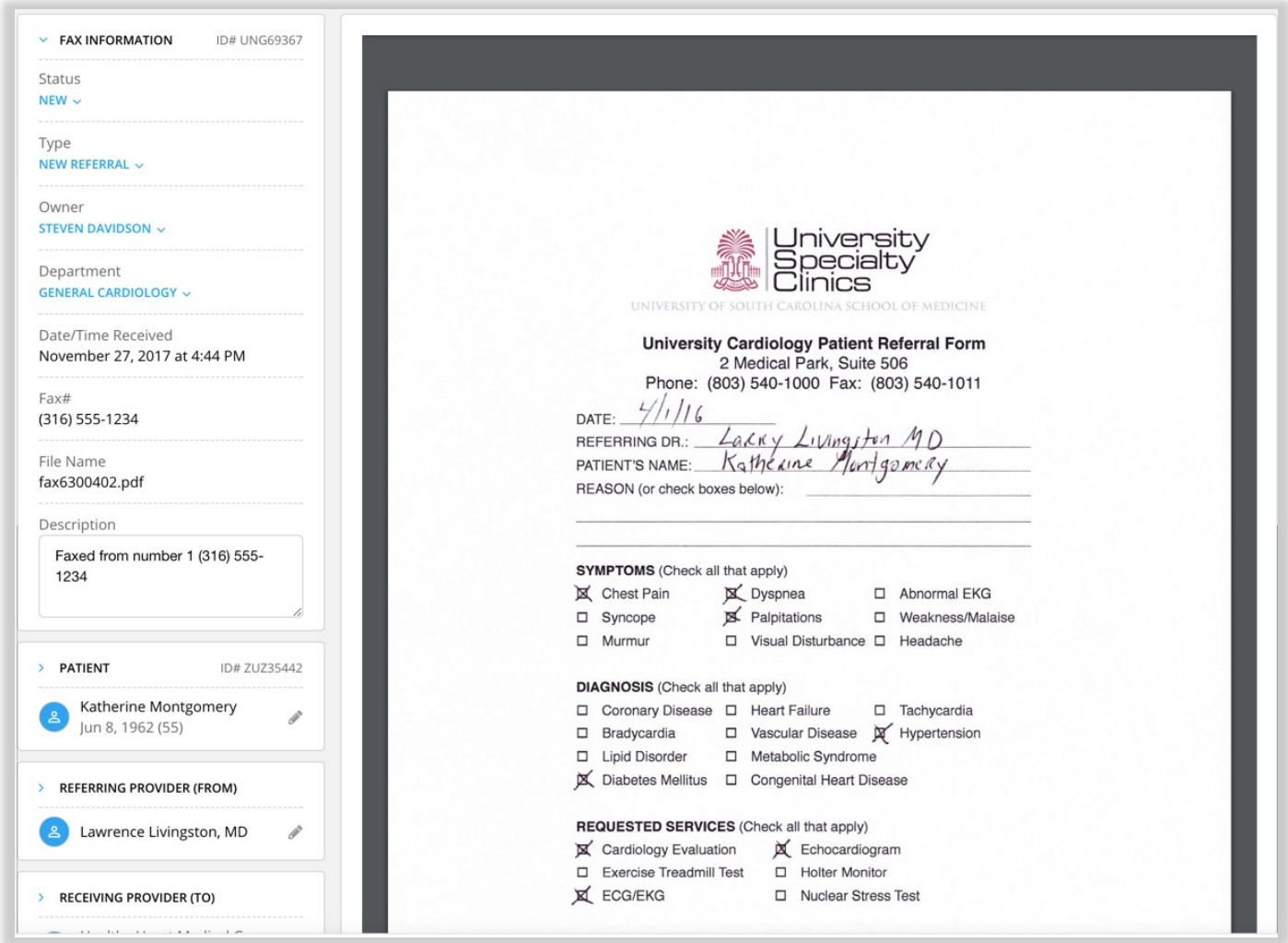
CRM For Activity Tracking

- ✓ 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



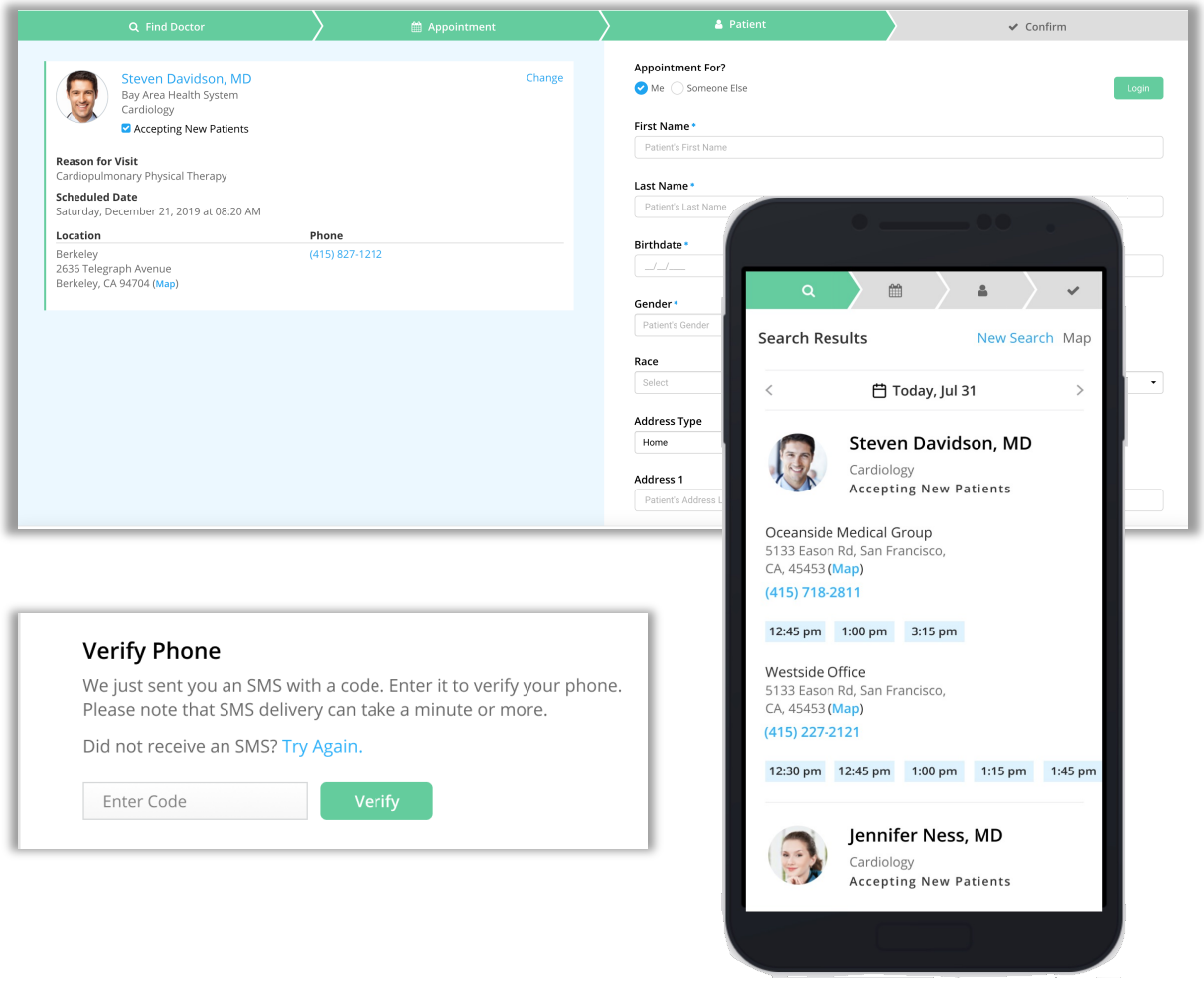
Fax Management

- ✓ 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



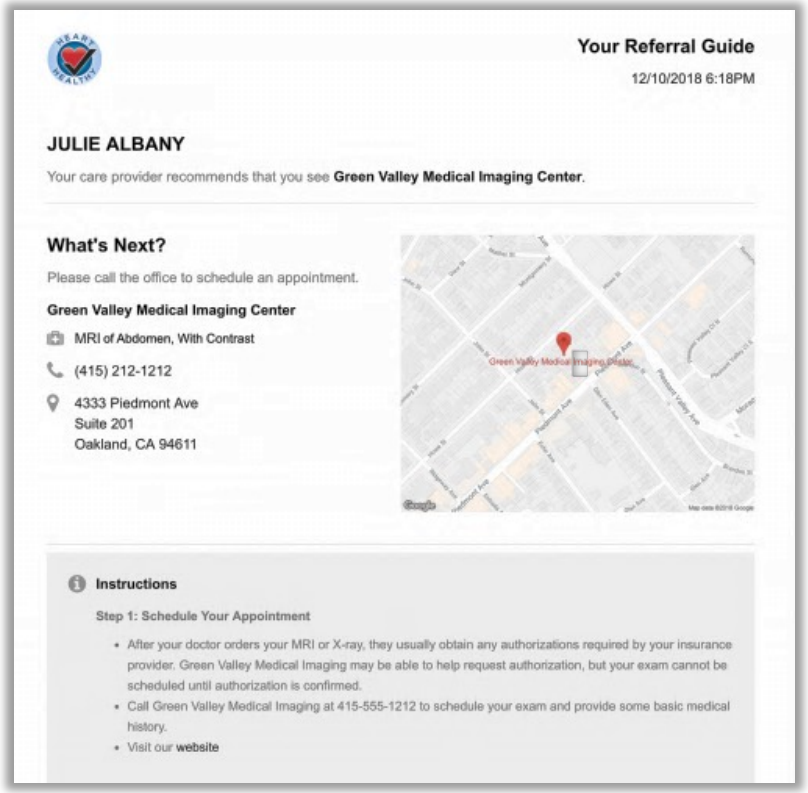
PATIENT SCHEDULING

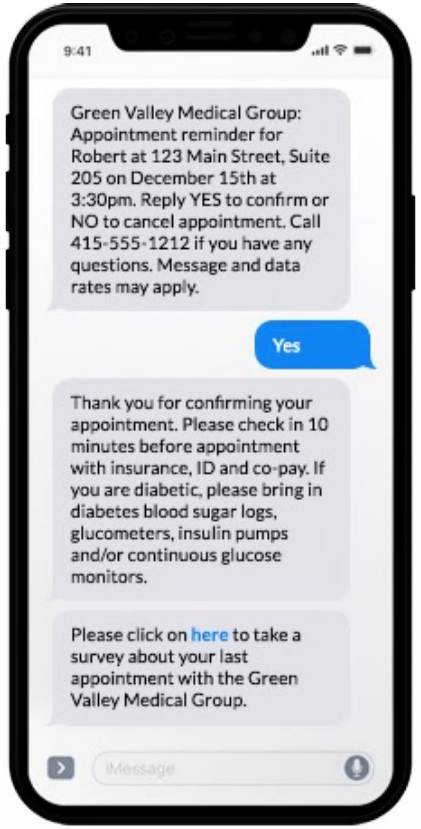
- ✓ Improve patient access by offering patients an easier way to find doctor based on specialty, insurance, location, condition, procedure and more
- ✓ Simple process: patients choose the provider and location, select appointment date/time, enter their personal information and verify their mobile number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

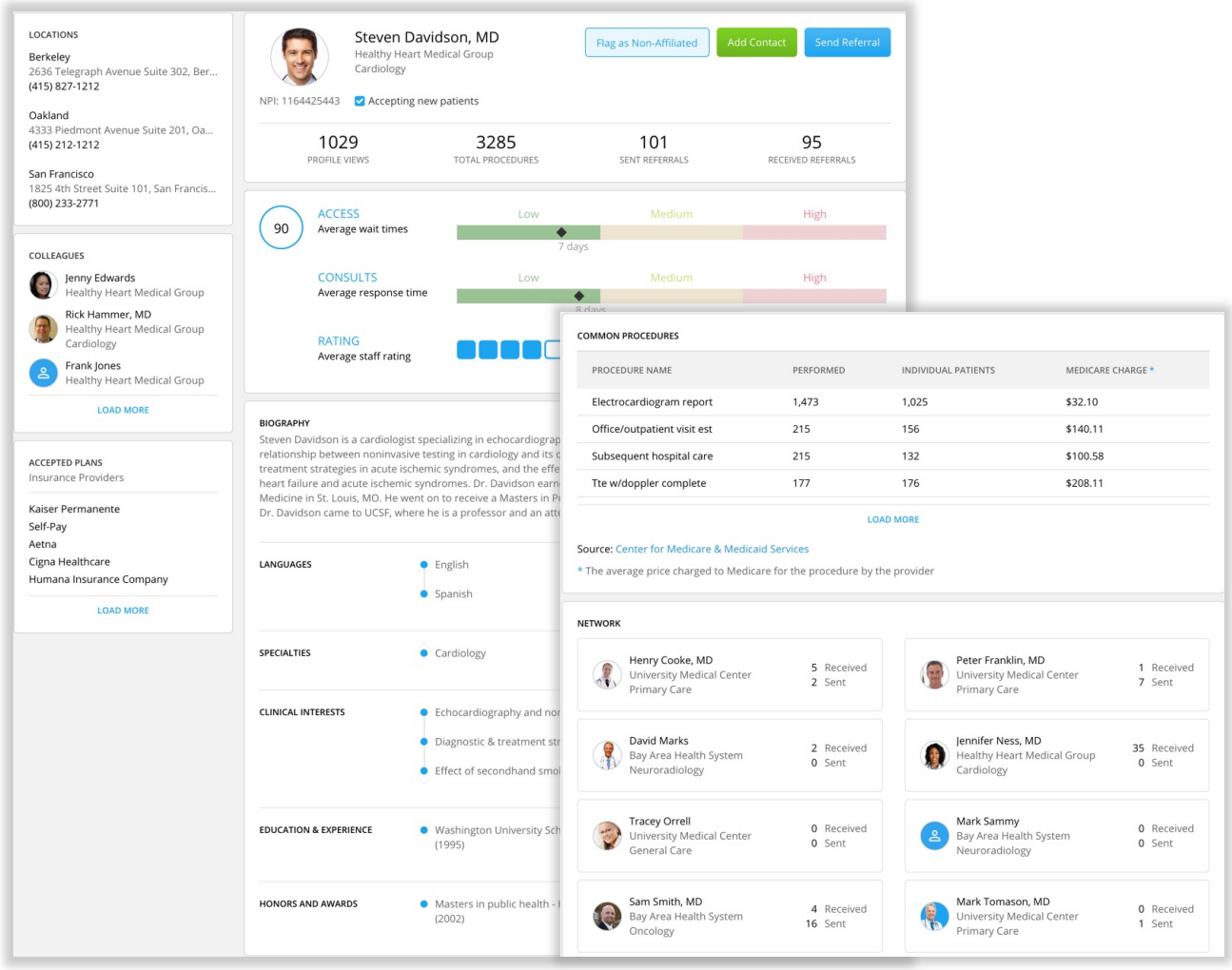
- ✓ Rules can be defined to automatically send appointment instructions, reminders and follow-up communications to patients via text or email messages
- ✓ Templates for automated messages can be customized and assigned to locations
- ✓ Multiple appointment reminders can be sent until appointments are 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





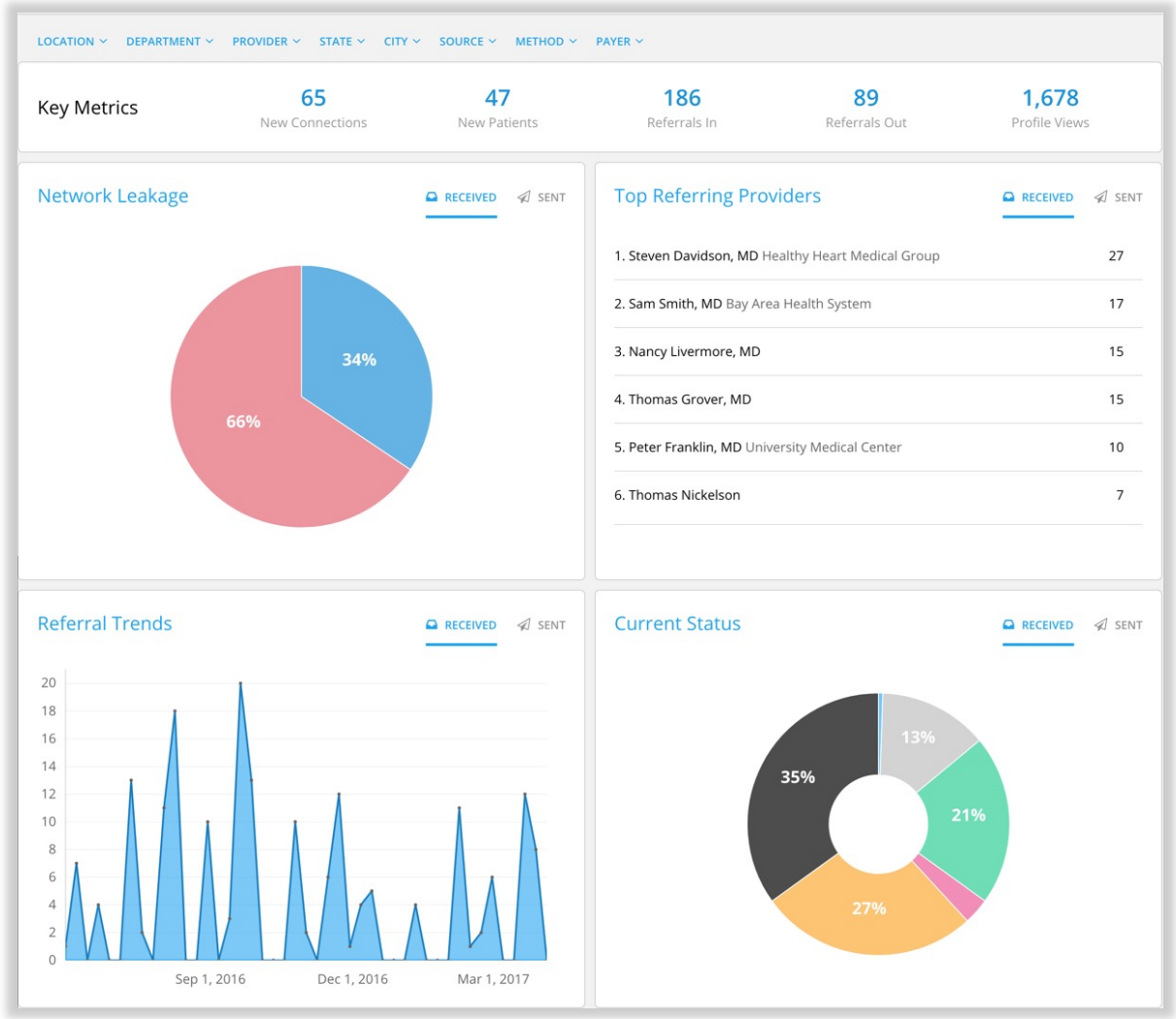
Directory Includes 7M+ Providers

- ✓ 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



Advanced Analytics

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



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We Look Forward to Speaking with You Soon!