# Work Smarter, Not Harder
## with ReferralMD's AI Platform

## Digital Front Door

- **Patient Access Tools:** Provider directory and online scheduling embedded on your website allows patients to find providers and book or request appointments.
- **Scheduling Integration:** Online scheduling integrates with the receiving provider's EHR or scheduling system to check provider availability in real-time.
- **Automated Communications:** Text and email messages sent to patients as consults and referrals advance through the workflow based on predefined templates and rules.
- **Conversational AI Intake:** Conversational AI powers the intake process allowing patients to complete registration forms and sign consent forms electronically on their phones.
- **Seamless Intake Integration:** Completed registration forms and signed consent forms routed automatically to the EHR.
- **Automated Reminders:** Text and email reminders automatically sent to patients prior to their appointments based on predefined rules.
- **Patient Responses:** Patients can confirm or cancel appointments directly from the text and email messages.
- **Automated Notifications:** Text and email notifications, appointment instructions and no-show messages automatically sent to patients.

## eConsults

- **Seamless EHR Integration:** Enables bidirectional flow of consults, medical records, and updates between ReferralMD and the sending/receiving EHRs.
- **Tailored Consult Workflow:** Features distinct, customizable workflows for managing both inbound and outbound consults efficiently.
- **Centralized Consult Management:** Centralized work queue allows your team to manage inbound and outbound consults by exception.
- **Smart Proactive Alerts:** Automated alerts inform your team when consults do not advance through the workflow based on predefined rules or if specific events take place.
- **Specialist Scheduling:** Rules can be defined to specify when specialists within the network are available to process consults.
- **Dynamic ConferMed Routing:** Consults can be automatically routed to our partner ConferMed for all patients or when in-network specialists are not available based on predefined rules.
- **Automated Conversion:** Referrals can be automatically converted to consults based on predefined rules such as specific specialties.
- **Manual Conversion:** Consults can be converted to referrals when specialists recommend that the patients see specialists in person.
- **Automated Status Updates:** Automated status updates sent to providers and patients as consults advance through the workflow.

## Referral Management

- **Seamless EHR Integration:** Enables bidirectional flow of referrals, medical records, and updates between ReferralMD and the sending and receiving EHRs.
- **Tailored Referral Workflow:** Features distinct, customizable workflows for managing both inbound and outbound referrals efficiently.
- **Centralized Referral Management:** Centralized work queue allows your team to prioritize and manage inbound and outbound referrals by exception.
- **Omnichannel Inbound Solution:** Allows your team to receive inbound referrals via multiple channels such as other ReferralMD customers, ReferralMD referral and scheduling portals on your website, EHR integrations, Direct messaging, fax.
- **Smart Proactive Alerts:** Automated alerts inform your team when referrals do not advance through the workflow based on predefined timeframes or if specific events take place based on predefined rules.
- **SmartMatch Technology**: Customized algorithm generates a curated list of providers for the patient when sending referrals based on predefined criteria such as accepted insurance, network tier, wait time, proximity to patient, etc.
- **Automated Status Updates:** Automated status updates sent to providers and patients as referrals advance through the workflow based on predefined rules.

## ReferralMD Services

### Implementation Services
- Robust integrations with EHRs and other systems
- Project management
- Customized workflow analysis
- Customized training and rollout options

### Ongoing Support Services
- Support via live chat, portal, phone and email
- Ongoing training using Help Desk videos
- Dedicated Account Manager
- Regular business reviews

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## Prior Authorizations (PA)

- **Integrated PA Process:** Prior authorizations automated within your referral and scheduling workflow, streamlining operations.
- **Automated PA Triggers:** PA process automatically initiated from referrals, orders, and appointments extracted from the EHR.
- **Insurance Verification:** Optional insurance eligibility and benefits verification for comprehensive financial clearance.
- **Comprehensive Solution:** Automated PA solution supports all payers and specialties so your team only needs one workflow across all patients.
- **AI-Driven PA Processing:** PA workflow accelerated by artificial intelligence and robotic process automation using various payer connection methods.
- **Exception Handling:** PAs automatically roll over to our partner's billing specialists for exception handling when automation cannot process the PAs.
- **Status Monitoring:** PA statuses automatically tracked including approvals, denials, and requests for additional review or information.

## Fax Management

- **Centralized Fax Management:** Allows your team to process all inbound and outbound faxes in one central work queue.
- **Advanced OCR and AI Integration:** Utilizes OCR technology and AI to scan, categorize, and extract data from faxed documents.
- **Flexible Fax Number Management:** Allows your organization to port existing fax numbers or new ones can be assigned.
- **Automated Outbound Faxing:** Automates faxing referrals and status reports to referral partners based on predefined rules.
- **On-Demand Outbound Faxing:** Allows your team to send any document to any recipient.
- **Custom Fax Organization:** Allows your team to split, merge, and categorize inbound faxes based on predefined categories.

## Marketing Tools (CRM)

- **Referral Network Management:** Allows your marketing team to organize referral networks and establish customized network tiers.
- **CRM Workflow Customization:** Tracks the status of each partner relationship through a tailored CRM workflow, ensuring comprehensive monitoring.
- **Detailed Outreach Documentation:** Allows your team to document all outreach activities with referral partners, such as tasks, calls, emails, and meetings.
- **Personalized CRM Queue:** Enables users to tailor their work queues to focus exclusively on their referral partners, enhancing efficiency.
- **Marketing Analytics:** Compares outreach efforts with referral volume, providing insights into partner performance.
- **Extensive Provider Directory:** Includes a comprehensive directory of over 7 million individual and organizational providers with monthly updates from CMS.

## Analytics & Reporting

- **Automated Reporting:** Automated reports emailed at user-defined intervals, tailored to your key performance indicators (KPIs) that benchmark results against historical data and predefined targets.
- **Dynamic Real-Time Reporting:** Comprehensive, real-time reports across all modules in the platform allows users to customize views, filters and columns with the option to export data for further analysis.
- **Flexible Data Integration:** Automated, customizable data feeds seamlessly integrate with your data warehouse or business intelligence (BI) tool.

## System Integrations

- **Peerless Experience:** Years of experience perfecting processes for implementing robust bidirectional integrations and complying with any method supported by the EHR, RIS, PM, or other third-party system to satisfy the customer's specific integration use cases.
- **Integration Engine:** Provides queuing to ensure messages are not lost between the platform and third-party systems when connection issues occur.
- **Integration Log:** Provides visibility into the messages flowing between ReferralMD and third-party systems and alerts the team if messages fail.
- **Self-Service Tools:** Data mappings and integration configuration can be managed directly within the platform by your team.

## ReferralMD Benefits

### Sending Providers

- Match patients with the most appropriate providers
- Keep patients in-network and decrease leakage
- Close the feedback loop with real-time status updates
- Improve productivity of coordinators with automation
- Improve customer service with providers and patients
- Increase lifetime value (LTV) of your patients

### Receiving Providers

- Boost revenue by converting more referrals to appointments
- Improve customer service with providers and patients
- Reduce no-show rates with automated reminders
- Gain insight into consult and referral patterns
- Decrease time to process consults, referrals, intake & appointments
- Increase speed and accuracy of authorization approvals

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