

# Work Smarter, Not Harder

## with ReferralMD's AI Platform

### 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.

### Fax Management

- **Advanced AI and OCR Integration:** OCR technology scans faxes and extracts data and powerful AI automatically splits faxes into separate documents, rotates fax pages, identifies patients, senders and receivers and categorizes documents.
- **Centralized Fax Management:** Allows your team to process all inbound and outbound faxes in one central work queue.
- **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.
- **Editing & Forwarding Faxes:** Allows your team to split, merge, and categorize faxes as well as forward faxes to other departments.

### Appointments and Scheduling

- **Smart Scheduling:** Quickly find and book the closest, in-network appointments using a real-time, map-based scheduler—no need to leave ReferralMD or log into external systems.
- **Automated Reminders:** Reduce no-shows with automated reminders and follow-ups. Patients can confirm, cancel, or reschedule directly from text or email messages.
- **Closed-Loop Referrals:** Ensure seamless referral-to-appointment handoffs with real-time tracking, automated status updates, and visibility into unscheduled referrals—all without manual follow-ups.
- **Powerful Dashboard:** Gain real-time insights into patient intake and appointments with flexible dashboard views, helping you track progress, reduce no-shows, and optimize operational efficiency.

### 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 receiving provider's EHR or scheduling system to check availability in real-time.
- **Automated Communications:** Text and email messages sent to patients based on predefined templates and rules.
- **Conversational AI Intake:** Conversational AI powers the intake process allowing patients to complete registration and sign consent forms 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, cancel or reschedule appointments directly from the text and email messages.
- **Automated Notifications:** Text and email notifications, appointment instructions and no-show messages automatically sent to patients.



### 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

#### 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



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### 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.
- **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 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.

### Analytics & Reporting

- **Real-Time Dashboards and Visualizations:** Access real-time dashboards that summarize key metrics, including consult/referral trends, top providers, and network leakage.
- **Customizable and Automated Reporting:** Generate on-demand and automated reports that measure performance and productivity across various parameters such as groups, locations, users, and referral partners.
- **Workflow Optimization:** Identify workflow patterns through on-demand and automated reports, allowing your team to determine if custom-defined workflows or processes need refinement, thereby improving operational efficiency.
- **Trend Analysis for Proactive Decision-Making:** Uncover trends related to consults, referrals, referral partners, and users, enabling your team to take timely actions and improve patient care outcomes.

### Marketing 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 marketing 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 marketing outreach efforts with referral volume, providing insights into partner performance.
- **Extensive Provider Directory:** Comprehensive directory with over 7 million providers and monthly updates from CMS.

### 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 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

