Intelligent automation helps home healthcare providers process referrals and intake patients better, faster, and smarter

Client
Large home healthcare provider

Company Size
10,000 employees

Location
North America

The home healthcare industry is rapidly evolving due to the aging population, the increase in prevalence of chronic diseases, and consumer demand for in-home care. To remain competitive, the client needed to address inefficiencies in referral processing, which was a critical bottleneck in their service delivery.

Our team implemented automation to streamline referral processing. This solution significantly reduced response times and ultimately enhanced patient care.

Intelligent Automation

Referral Processing Optimization

Data Integration

Enhanced Decision-Making Tools

The Challenge: Manual processes increased errors and hindered response times to case workers

Objective: Improve response time to referral requests.

Existing Issues: Manual processing led to delays and errors.

Solution Needed: An automated system to streamline referral processing.

Outcome: Reduced processing time and improved response rates.

The client faced significant challenges in their referral processing system, which was prone to errors and time-consuming. This inefficiency hindered their ability to respond promptly to case workers, affecting their competitiveness in the home healthcare market.

The Solution: Design and implement an intelligent automation solution

To address the inefficiencies, an automated solution was implemented that drastically reduced the time and errors associated with referral processing. This solution allowed the client to respond to referral requests faster, enhancing their service delivery and reputation among case workers. Here is a summary of the phased approach:

Phase 1: Data Collection Automation

To bridge the divide between the ERP, CRM, and other systems, we automated data entry from referral sources to reduce errors and speed up processing.

Workstreams:

- Automation development for referral data entry
- Implementation of error-checking algorithms

Phase 2 : Decision-Making Automation

We implemented rule-based algorithms to automate referral acceptance decisions, ensuring consistency and speed.

Workstreams:

- Decision-making algorithms deployment for acceptance or rejection of referrals
- Integration with workflows

Phase 3: Insurance Verification Automation

In this phase, we streamlined insurance verification to minimize errors and accelerate the verification process.

Workstreams:

- Automation of insurance verification
- Integration with insurance databases
- Enablement of real-time checks

Phase 4: Scheduling Automation

Our team automated scheduling to reduce manual adjustments and ensure timely onboarding.

Workstreams:

- Implementation of automated scheduling tools
- Introduction of placeholders based on SLAs
- Enablement of patient self-scheduling

Services and Technologies Used:

Services:

- Data Strategy & Governance
- Master Data Management Implementation
- Data Quality & Integration Services
- Change Management & Enablement

Technologies:

- Profisee Master Data Management Platform
- Azure Data Factory / Azure Integration Services
- SQL Server for data staging
- Power BI (for MDM impact tracking and reporting)

The Results: Impact on the client organization

The automation of referral processing led to significant improvements in response times, which enhanced the client's ability to quickly accept a higher number of patients whose situations were suitable for home healthcare. The project's success underscores the importance of automation in reducing operational inefficiencies and improving overall service quality and operating margin.

Improved Efficiency: Automation led to a 90% reduction in processing time.

Operational Focus: This work improved focus on higher-value tasks by the staff.

Enhanced Referral Success: This effort increased referral acceptance rates.

Market Competitiveness: These results strengthened the client's competitiveness in the home healthcare market.

Reputation Boost: By improving the referral process, the client's reputation was enhanced among case workers.