Patient Access
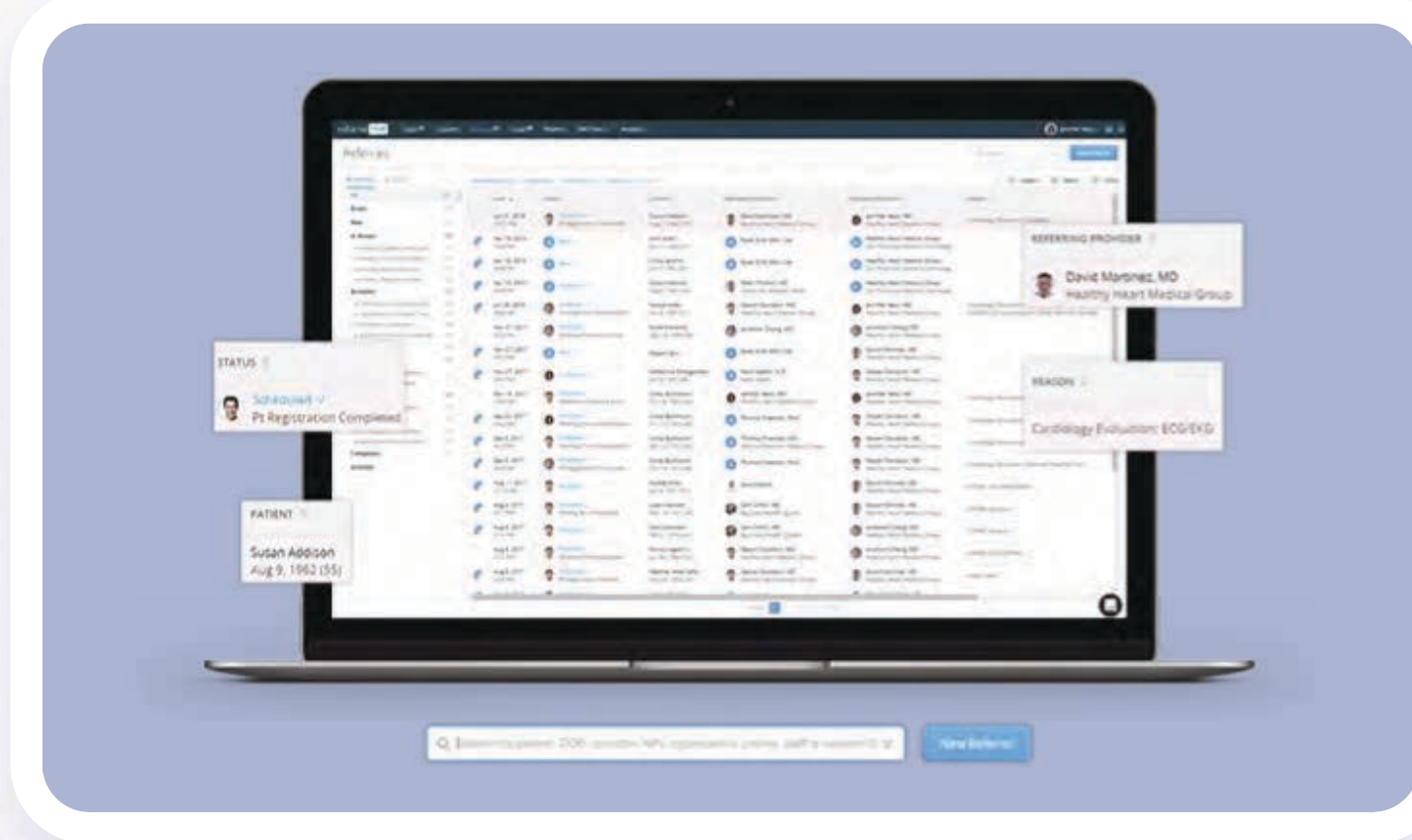
- Embed provider directory on your website based on detailed provider profiles managed by your organization
- Provider profiles include specialties, subspecialties, procedures offered, conditions treated, education, etc.
- Patient scheduling from your website to book or request appointments with customized forms
- Automated patient communications via text or email
- Customize templates and rules to trigger messages by organization, region, location or department
- Send referral notifications, appointment instructions, reminders, surveys and no-show messages
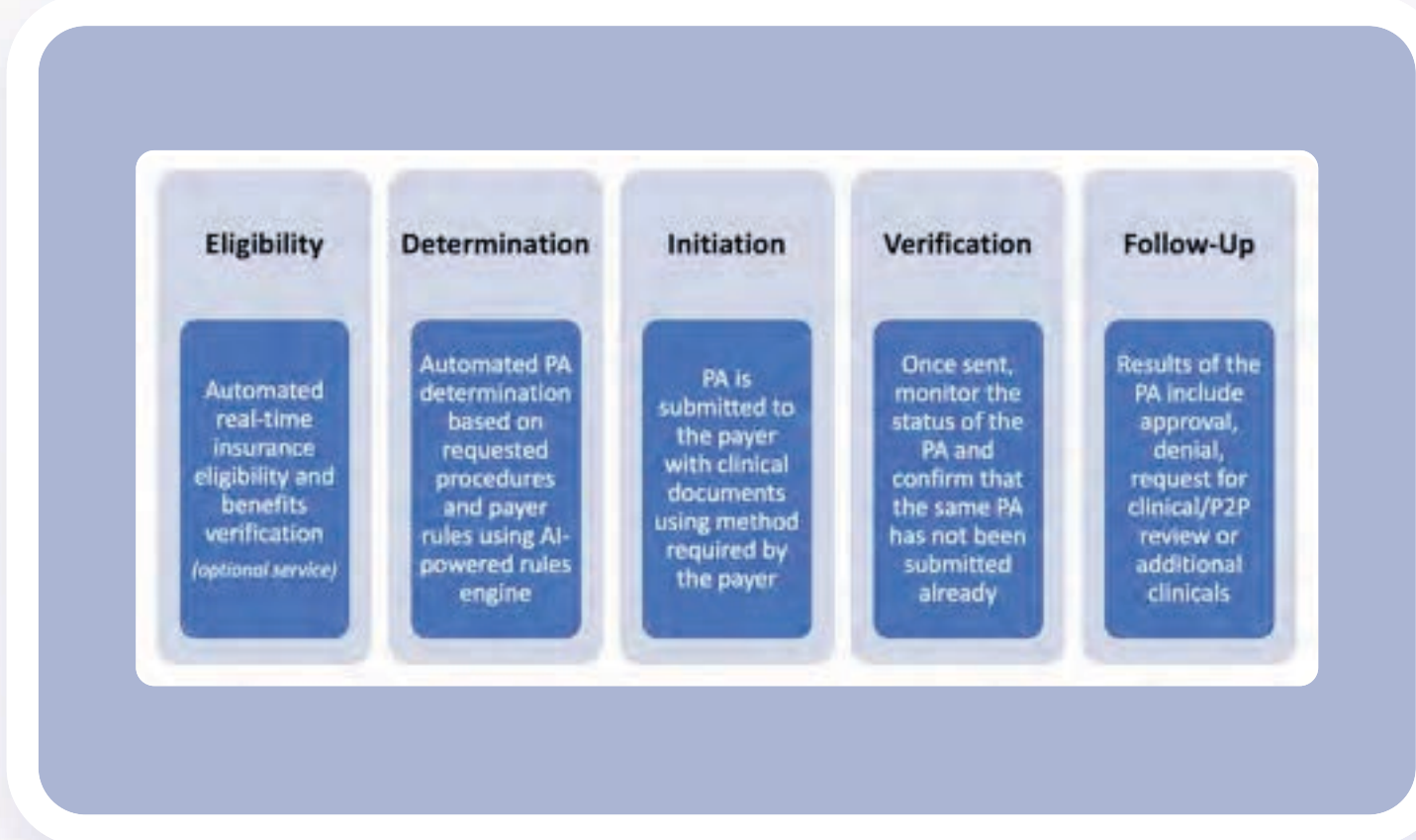- Patients can confirm or cancel appointments via text or email which updates EHR or Scheduling system

Referral & Fax Management

- Manage referrals from multiple channels in centralized work queue
- Define customized workflow steps by organization, region, location or department
- Send referrals using SmartMatch which ranks specialists using customizable algorithm
- Automated alerts based on customized rules and automated status updates sent to referring providers
- Log tasks, notes, calls and emails for referrals and exchange messages between referring and receiving provider offices
- Manage and process faxes in SmartFax work queue using ported or new fax numbers
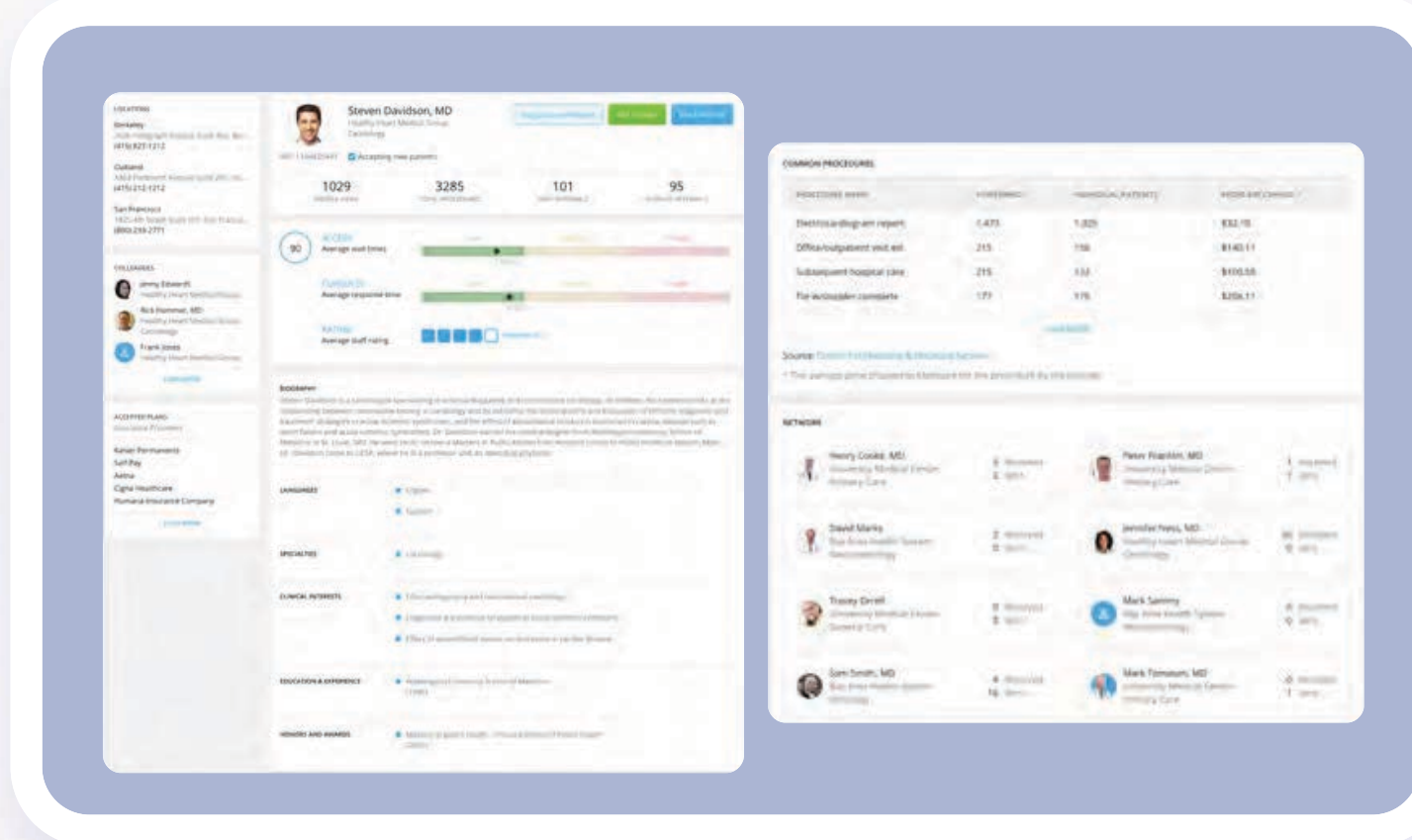- Split and merge faxes and categorize fax documents using customized categories

Pre-Referral Consults

- Automatically send consult requests to specialists prior to sending referrals
- Define rules to route consult requests to your specialists or ConferMED network
- Define rules to determine when consult requests are required prior to sending referrals
- Send consult requests and relavent patient documents to specialists for e-consults
- Send consult report from specialist to the referring provider's EHR for review
- If referral is recommended, system automatically converts consult request to referral order
- If referral is not recommended, system automatically closes the consult request

Prior Authorizations

- Automated prior authorizations (PAs) process embedded into the referral workflow
- PAs can be automatically triggered based on referrals, orders and appointments pulled from the EHR
- Optional insurance eligibility and benefits verification
- Automated PA determination based on requested procedures and payer rules using AI-powered rules engine
- PAs are submitted to payers with clinical documents using methods required by the payers
- After sending, system monitors the status of the PAs and posts updates directly within the workflow
- PA results include approvals, denials and requests for clinical review, P2P review or additional clinicals

Marketing Tools

- CRM allows marketing teams to manage their referral network and define customized network tiers
- Customized CRM workflow tracks the status of each partner relationship throughout the entire process
- Document outreach activity with referral partners including tasks, notes, calls, emails, meetings, etc.
- CRM work queue allows users to customize their views to only track their own referral partners
- CRM dashboard compares marketing outreach activity with referral volume across partners
- Market research tools include provider directory with over 7 million individual and organization providers
- Analyze referral patterns between providers based on claims data from Medicare or third-party sources

Real-Time Analytics

- Powerful analytics across the platform based on real-time data
- Referral reports include Dashboard, Communications, Fax Activity, Leakage Rate, Referral Activity, Maps, Trends, Volume and Service Levels
- Marketing reports include Dashboard, Competitor Volume, CRM Activity, Trends
- Drill-down within the Dashboard to access detailed reports with ability to customize views
- Customize reports including primary and secondary grouping columns, timeline display, search filters and date range
- Export reports as Excel documents with report parameters, graphs/charts and supporting data
- Option to integrate platform analytics data with your data warehouse or BI tool

ReferralMD Benefits

ReferralMD helps providers increase revenue, reduce risk and drive short and long-term cost savings while helping patients receive care faster with the most appropriate specialists.

Referring Provider

- Match patients with the most appropriate provider
- Status of referral (feedback loop)
- Increased patient LTV
- Operational efficiencies

Receiving Provider

- Keep patients in-network (leakage)
- Capture additional referral revenue
- Improve customer service with PCP
- Gain insight into referral patterns
- Operational efficiencies

Patient

- Patient instructions and directions to specialist office
- Appointment reminders and confirmations via text/email
- Follow-up communications

Professional Services

Implementation Services

- Standalone system or fully integrated workflow with EHRs and other systems
- Project management
- Customized workflow analysis
- Training and rollout options available

Ongoing Support Services

- Support via chat, phone and email
- Ongoing training via videos and walkthroughs by module
- Dedicated account manager
- Quarterly business reviews