



Streamlining the Intake and Referral Management Process: A Cloud-Based Data-Delivery Solution for Healthcare



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The patient referral process is broken.

A critical component of the healthcare system, the patient referral process is all too often a low-tech interaction that requires manual processing of a high volume of patient data. And it can take hours, even days, to input into the EHR.

The challenges inherent in the patient referral process have been widely recognized. A report published by the Institute for Healthcare Improvement acknowledged that the process is cumbersome, “often hindered by ambiguity of roles, communication breakdowns, clinicians’ workloads, and variations in requirements among specialists” — a situation that “can lead to missed or delayed diagnoses, delays in treatment, and other lapses in patient safety.”

In this playbook, we will look at the challenges facing patient-referral intake departments and how a new cloud-based application enables them to optimize the process and improve access to and quality of patient care.

A 2016 study by a large health system found that about [half of PCP referrals](#) to non-procedural, high-volume specialists had resulted in a completed appointment.

Studies indicate that about [20% of diagnostic errors](#) are caused by breakdowns in the referral process.



'It's the Wild West'

"The intake department is the lifeblood of an organization," said Chris Larkin, Chief Technology Officer at Concord Technologies. In most healthcare organizations, the intake department looks much like a call center, and in some cases, a website may allow patients to inquire into the services themselves.

Fax continues to be the most ubiquitous technology to communicate care coordination, with at least [70% of healthcare providers continuing to use the technology for exchanging medical information as of November 2021](#). Organizations that continue to use legacy fax technology must rely on error-prone manual data entry for keeping patient records up to date.

"When it comes to managing incoming referrals, it's the Wild West," said Shawn Brockman, RN, MBA, Vice President of Product Management at Concord Technologies. "We see a lot of different methods and processes for handling referrals, which can lead not only to inefficiencies but also to patients actually falling through the cracks, which is a real concern."

In recent years, providers have voiced concerns about the importance of standardizing referral intake — and access to data capture that enables greater insight and business intelligence for pinpointing bottlenecks in the process and supporting the growth of their organizations.

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**SHAWN BROCKMAN, RN, MBA,
VICE PRESIDENT OF PRODUCT MANAGEMENT AT CONCORD TECHNOLOGIES**

The Unique Challenges of Behavioral Health

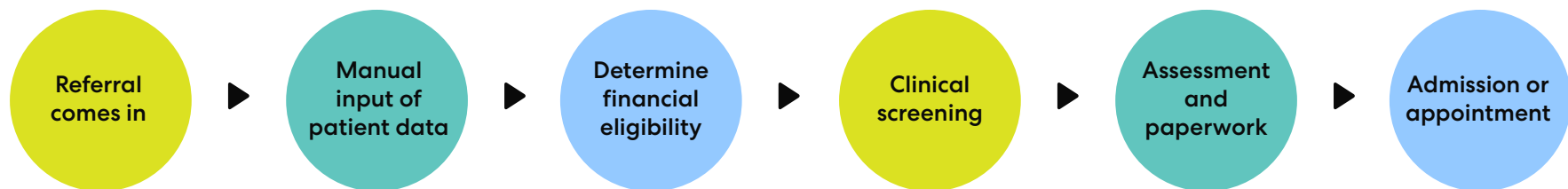


The challenges presented by the complex patient-referral process are of particular concern for behavioral health providers, who face a unique set of challenges. As the need for their services increases, a shortage of providers and limited health insurance coverage are hindering access to care.

“Given the supply-demand ratio in the field, there’s a huge problem with access to care because resources are so scarce,” Larkin said. In the case of some specialty facilities or treatment organizations, it could take as much as two months to access services.

A [survey](#) conducted by the National Council for Behavioral Health found that, while the stigmas surrounding mental health are lessening, cost and access continue to be barriers to receiving care. The survey found that 38% of adults reported waits of a week or more for an appointment, with 46% reporting the need to travel an hour or more to see a mental health professional.

Now, as the country confronts what the Biden administration has called “an unprecedented mental health crisis,” the need to improve the situation is more urgent than ever.





What community mental health services need: More efficient referral management

Behavioral health is primarily composed of community mental health centers — nonprofit organizations that provide the full continuum of care in several types of treatment settings, including inpatient residential, outpatient and community-based treatment settings. Most of these facilities typically have a centralized intake department.

“For these organizations, the intake process can be overwhelming,” Larkin said. “If public funding is part of the mix, there are often state reporting requirements that require monthly reports with very specific information about the patients they serve, requirements that don’t exist for other areas of healthcare.”

Now there is a solution that provides the capabilities that behavioral health providers need.

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CHRIS LARKIN
CHIEF TECHNOLOGY OFFICER AT CONCORD TECHNOLOGIES

Concord Care Intake: Built on a Cloud



There is now an urgent need to improve the referral intake process — to ensure accurate data input, prevent errors, provide analytics for tracking patient referrals and visits, and streamline the process for greater productivity.

Concord Care Intake, is built on the proven Concord Fax infrastructure, which transmits more than 12 million pages of protected health information every business day. It enables them to process referrals faster and enable quick and vital decisions.

“Our solution serves as a front door to an EHR, supporting intake

departments in receiving and managing referrals and self-referral inquiries into a single interface that enables them to receive fax and email referrals,” Larkin said.

Concord Care Intake consolidates the many ways that organizations receive referrals and provides a workflow for collaborative review and management of the status of referrals. “Regardless of how they are received, the inbound referrals are standardized with various tools to prioritize referrals and streamline the process — coupled with analytics that give directors insight into the intake department operations.”



STEP 1

Inbound referrals are received into a team’s shared folder



STEP 2

A team member starts processing the referral immediately, with all changes tracked



STEP 3

The team member extracts the fields needed to make a data-based decision on the referral.



STEP 4

After approval or denial, the data needed from the referral can be routed to an EHR or other system



STEP 5

Cloud Fax confirmation can then be sent to the referring provider

How Concord Care Intake Works

Concord Care Intake is designed to consolidate, standardize and optimize referral management. Here's how it works:

1. Extracts key data from referral documents

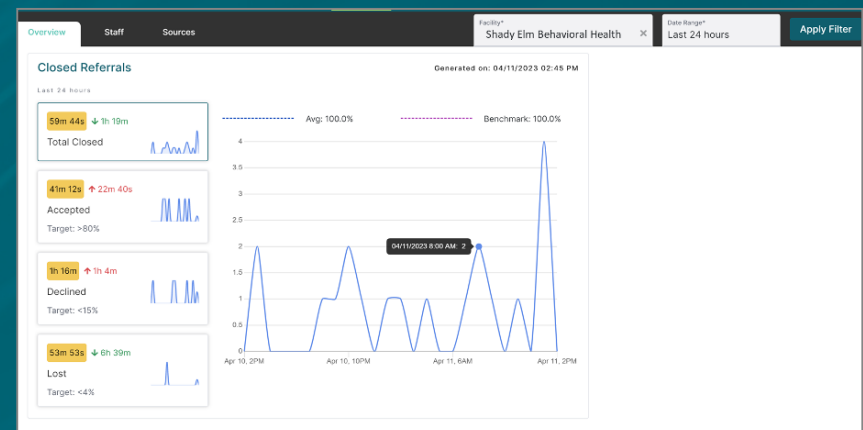
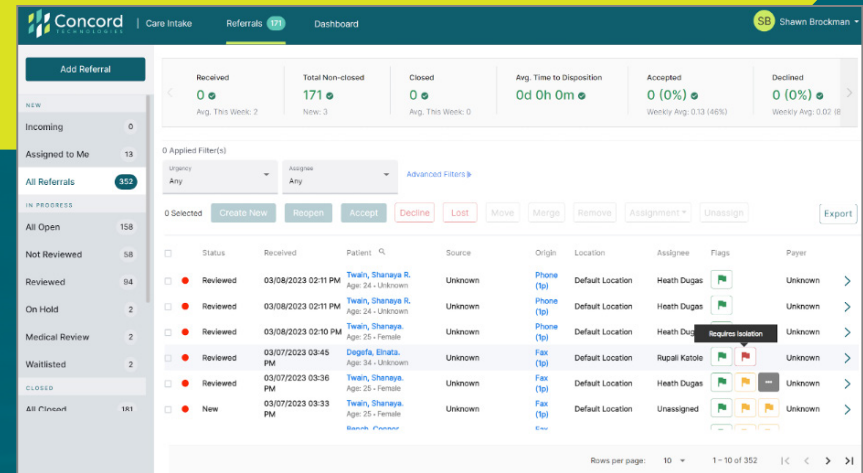
Leveraging the unique capabilities Concord Cloud Fax, Concord Care Intake uses the power of AI-enabled machine learning to read and extract key patient data (including exclusion-criteria flags) in referral documents that arrive via fax, email, phone and walk-ins (and soon, direct messages).

2. Integrates patient data into your database

Because most referral documents are delivered by fax, the patient data is seamlessly extracted and integrated into the Concord Care Intake application — reducing the time needed to process paper documents. This helps intake teams reduce errors resulting from manual input and the time to disposition.

3. Accesses critical insights about your referral process

Concord Care Intake offers detailed reporting that provides insights that may help facilitate continuity of care and provides a view into potential deficiencies in the intake process. For example, you can access statistics that reflect lost or declined referrals, the most frequent reasons for referral, and referral sources that result in the highest percentage of accepted referrals. Just as important,



you'll gain an understanding of the total number of potential opportunities and how your organization has performed in response to those opportunities, reducing errors resulting from manual input and the time to disposition.

Concord Care Intake Delivers What Providers Need

By automating patient-referral intake, healthcare organizations can free up valuable time for staff and providers so they can improve and streamline access to care. See how Concord Care Intake's AI technology delivers the capabilities that caregivers need.

Fast disposition

Concord Care Intake equips intake teams with the tools they need for faster referral processing and enables providers to make the “admit or not admit” decision faster. “Our ability to configure the application to process faxes and extract data using OCR as pages are received – instead of waiting for the entire fax document to be received – is a unique benefit of Concord Care Intake,” said Chris Larkin. “It means you can respond quickly when keywords are recognized right away. And it can give you a 30- to 60-minute head start in accepting that patient.”

A stronger referral network

Concord Care Intake provides data and analytics dashboards that help users identify referral outliers and act to better manage referral-source relationships. If fewer referrals are coming from a particular source, for example, analytics can help identify the issues and act to remedy the problem. It can also help providers determine whether there is increased demand for a new service that might be added.

Support for informed decisions

Concord Care Intake provides the accepting provider with the right information to enable quick decisions about the best way to begin the plan of care. “That means the patient not only gets access to care faster, but potentially shortens the length of stay and improves the organization’s bottom line,” Brockman said.

Quick, cost-effective implementation

Because Concord Care Intake can operate alongside your existing EHR, email or fax platforms, there is no need to rip and replace your existing infrastructure. So implementation can be quick and affordable.

Access to critical data

In a field with high rates of turnover and burnout, it is good to have tools that make it easy to support telehealth apps and the work of a remote workforce. Intake coordinators can access Concord Care Intake from anywhere and collaborate, while their directors can access data that enables them to monitor the performance of their intake teams.

Improved productivity

By consolidating referrals from multiple sources and displaying key data in a clear, comprehensive dashboard, Concord Care Intake pinpoints bottlenecks in referral management that can result in delayed care. It can also help the intake director understand how individual team members perform and act to improve efficiency and productivity.

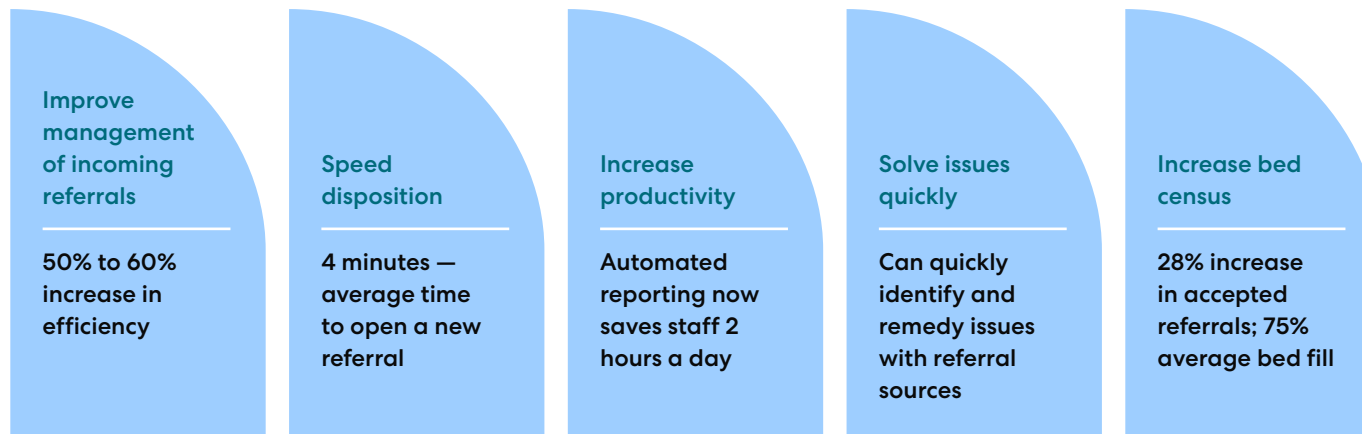
Support for business growth

With its detailed reporting, Concord Care Intake provides organizations with a view into lost and declined referral statistics to identify potential service deficiencies. It can also help you identify referring facilities with the highest percentage of accepted referrals so that you can nurture those relationships. By improving performance across the intake department, Concord Care Intake can help increase census and patient volume, which ultimately affects the revenue of the organization.

Case Study: Hendricks Behavioral Hospital

The intake department at Hendricks Behavioral Hospital needed a better way to manage the flood of referrals it received every day. It was important to speed up dispositions to prevent losing the patient to a competing facility. The ultimate goal was to achieve a higher bed census and better service use at its 112-bed facility.

With Concord Care Intake, Hendricks was able to:



“Concord Care Intake is saving intake coordinators significant time and the intake directors nearly two hours per day through automated reporting. The data and analytics dashboards allow us to manage bottlenecks and take action to better manage our referral source relationships and make process improvements.”

WENDY TAYLOR, MSW, LCSW,
DIRECTOR OF ASSESSMENT AND REFERRALS

Conclusion

Often the first step in the patient journey, patient referral is critical to ensure that patients receive the right care at the right time. Because Concord Technologies believes that behind every document and every referral is a patient in need of care, it is committed to providing healthcare organizations with the tools to better deploy staff and, ultimately, to deliver better patient care and outcomes.



Concord Technologies is a leader in the development of new artificial intelligence technologies to extract data from documents and to ease the burden of managing fax communications. For more than 20 years, we have helped healthcare organizations send and receive critical documents securely and reliably. Today, we deliver more than 2 billion pages of protected health information each year with our Concord Cloud Fax solution. Now, with the launch of Concord Care Intake, we provide healthcare professionals with the tools, data and analytics they need to modernize the way they handle patient referrals.

[Learn More](#)

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