

Referral management

Automates the complete referral process from physician order to specialist appointment scheduling, ensuring seamless coordination between providers and reducing patient wait times.

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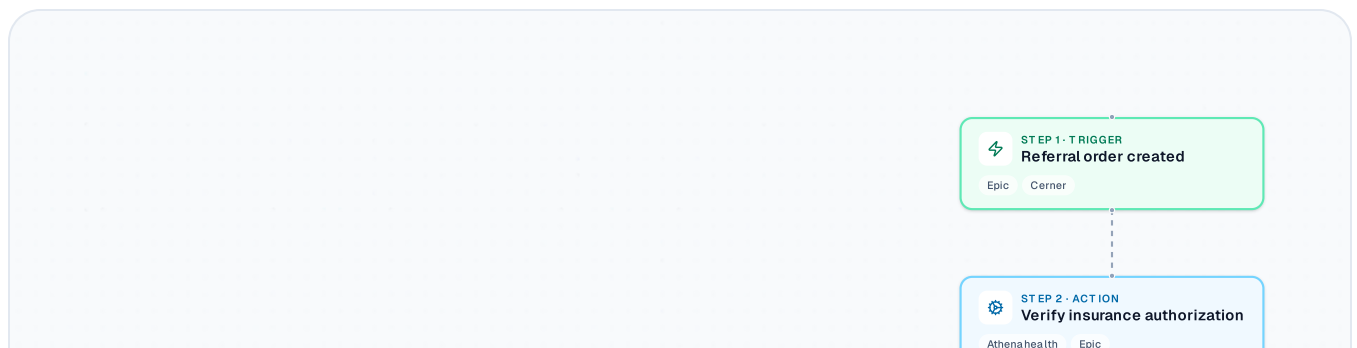


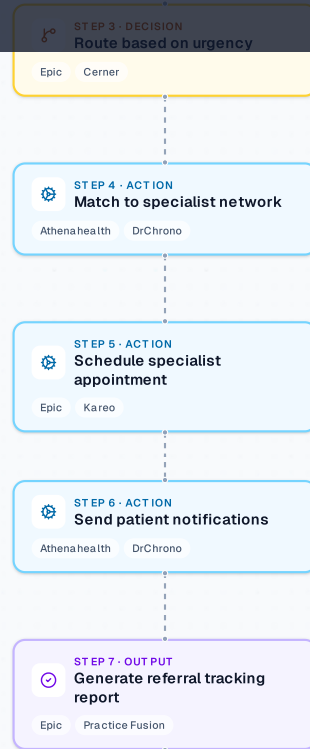
WORKFLOW TRIGGER

Primary care provider creates a specialist referral order in the EHR system

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Referral order created

Primary care provider submits a specialist referral through the EHR system. The referral includes patient demographics, clinical notes, and specialty requirements.

Epic

Cerner

2

 ACTION

Verify insurance authorization

System automatically checks patient's insurance coverage and determines if prior authorization is required for the specialist referral. Submits authorization request if needed.

Athenahealth

Epic

3

 DECISION

Route based on urgency

Evaluates referral urgency level and clinical priority to determine appropriate specialist and timeframe. Routes urgent cases to expedited scheduling queue.

Epic

Cerner

4

 ACTION

Match to specialist network

Identifies available specialists within patient's insurance network and geographic preferences. Filters by specialty, availability, and referral requirements.

5

ACTION

Schedule specialist appointment

Automatically books the earliest available appointment slot with the matched specialist. Sends appointment details to both patient and referring provider.

Epic

Kareo

6

ACTION

Send patient notifications

Delivers appointment confirmation, preparation instructions, and specialist contact information to patient via preferred communication method. Sets automated appointment reminders.

Athenahealth

DrChrono

7

OUT PUT

Generate referral tracking report

Creates comprehensive referral status report for referring provider with appointment details, authorization status, and patient communication log.

Epic

Practice Fusion



Outputs

- Confirmed specialist appointment
- Insurance authorization status
- Patient notification confirmations
- Referral tracking documentation



Key Metrics

- Average referral processing time
- Patient no-show rate for referrals
- Insurance authorization approval rate



Tools & Integrations

- Epic
- Cerner
- Athenahealth
- DrChrono
- Kareo
- Practice Fusion

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