



Closing Referral Gaps by Automating Patient Engagement

How health systems can optimize engagement for referrals to increase volumes, improve outcomes, and create a better patient experience.



Bringing Referral Management into the Digital Age

Optimal management of referrals is at the heart of many clinical, financial, and regulatory initiatives within health systems. And for good reason. Since many referrals are related to diagnosis and treatment of serious medical issues, when referrals are not closed, quality of care and patient health outcomes suffer.¹ Significant revenue leakage also occurs, especially among referrals for high-dollar procedures. Open referrals can even translate into lost incentives tied to value-based care agreements.

Despite the risks that come with referral gaps, many organizations are still using an outdated, manual process of patient engagement for referrals. This approach is inefficient and costly, causing significant delays for patients while putting pressure on health system capacity, staffing and scheduling. The end result is decreased visit volumes and increased frustration for patients and staff, which negatively impacts care, revenue and the patient experience.

Today's most advanced digital engagement platforms provide a distinct opportunity to address all of these issues by automating the patient outreach needed to close referral gaps.



This guide will detail the steps required to target, inform and activate patients while preserving valuable staff time and resources. It will also demonstrate how leading health systems employ these platforms to speed and streamline referral management.

A recent Intrado survey of College of Healthcare Information Management Executives (CHIME)

members revealed that

91 percent of these

healthcare executives believe improving the patient experience is a top priority.²

Optimizing the referral experience should be a key piece of these efforts, especially via solutions that provide patients with easy-to-manage scheduling.



An Opportunity to Minimize Manual Workload While Maximizing Interactions

According to healthcare professionals involved with managing referrals, there are numerous inefficiencies in the referral management process.³ While the electronic management of documentation between care providers is a step in the right direction, the last and most critical step—patient engagement—is still largely manual. Once a referral is received, a health system's call center staff spends much of their time leaving multiple messages for patients. For the patient, this often involves "phone tag" to return a call or waiting on hold. This outreach is inefficient and creates friction for patients and practitioners:

- **Reaching patients too late.** There are many variables that can delay the ability to schedule a referral—including insurance approvals, delayed documentation from the referring provider or scheduling concerns. Even though a referral may not be ready to schedule, patients must be kept in the loop on the referral status. Those who don't hear from the health system may independently contact the referring physician's office before the office is ready to schedule, or they may seek a referral for a different provider.

- **Reaching patients too early.** Call center staff spend a great deal of time calling patients who may not be ready to schedule, or when the health system's own capacity issues prevent timely appointments. As backlogs for referrals increase, schedules are filling fast, and this ill-timed outreach creates confusion and becomes a barrier to referral closure.
- **Calling too often.** As a result of poorly-timed outreach, and the fact that many people may not answer the phone (or have no intention of scheduling in the first place) health systems spend too much time and money chasing down patients. Most cannot afford this inefficiency. At the same time, organizations don't want to miss patients who simply forgot to return a phone call. In short, using staff time wisely is a constant balancing act and one that is exacerbated by staffing shortages and increased labor costs.
- **Not keeping physicians in the loop.** Referring physicians may not know the status of the patient outreach and referral closure process. When patients contact the referring provider for an update, this increases their staffing and resource burdens. Worse yet, when referring providers don't know the status of the referral, they aren't able to follow up with patients to encourage scheduling.

Ill-timed, ineffective outreach leads to frustration and inconvenience for both patients and staff—and fewer referral closures overall. In fact, studies show that just 35 percent of all patient referrals actually result in a documented visit.⁴ Fortunately, there is a solution that can bridge the gap in referrals-effectively engaging patients using simple, automated workflows.



Employing Automated Patient Engagement for Referrals

An automated, closed-loop patient engagement solution can streamline and speed outreach by targeting the right patients and reaching them when they are ready to schedule. When a referral is received, an automated workflow can trigger outreach to the patient - alerting them of the referral status and allowing them to schedule their appointment when the time is right for the provider and the patient. The workflow can include periodic and escalated patient outreach, as appropriate. Since every health system has different referral management needs, the most effective workflow will take the healthcare organization's unique requirements into account and be flexible enough to include personalized, patient-friendly messaging in the language and channel each patient prefers.

An automated approach can create an optimal patient experience and increase referral closures:

- **Keep patients and staff informed.** SMS or phone-based notifications can let patients know that a referral has been received and is being worked on—so they don't seek care elsewhere or contact the provider's office too early when it's not yet time to schedule.
- **Encourage patients to act.** When the referral is ready to be scheduled, patients who receive a notification may immediately respond with just a text or press of a button to be connected with a scheduler. Some platforms allow patients to self-schedule directly from an SMS message. In either scenario, the automated approach allows patients to respond when it's most convenient for them—and for the provider's office.

Focusing Staff Time and Energy on the Most Valuable Interactions

Automated referral workflows also benefit the health system by timing outreach for maximum efficiency. By automating notifications early in the process, staff can spend their time where it's most valuable—on the interactions that actually close referrals. As a result, these organizations spend less time and money on broad, repetitive and ineffective outreach.

Health systems can save staff time by using a patient engagement platform that is deeply integrated in the electronic health record (EHR) they already use. When the automated, patient engagement platform treats the health system's EHR as the single source of truth, all interactions involving patient engagement for referrals are written from and back to this EHR. For example, when patients don't want to schedule, this information is noted in the EHR in case later follow-up is appropriate. Such platforms can also be configured to ensure that referring providers are kept in the loop on referral status.

A growing need to close referral gaps.

Referral gaps are most common among health systems with complex provider networks.⁵ Given the industry trend toward consolidation, this complexity has become the norm for many organizations. Fortunately, investing in an EHR-embedded patient engagement platform can reduce friction and promote cohesive referral closure campaigns across all types of providers.

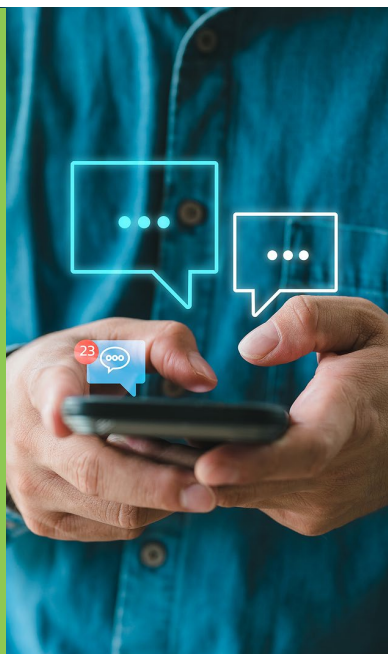
One Prominent Health System Realizes the Benefits of this Approach

At Froedtert Health & The Medical College of Wisconsin, referral orders were increasing. This meant staff members spent a large portion of their time contacting patients by phone, leaving a high volume of unreturned voicemails. They also experienced a high rate of declining patient interest and were unable to alert providers to follow up with those patients.

To address these issues, the health system decided to leverage its EHR-embedded patient engagement platform to create the following closed-loop referral management workflow:

- **Patients are engaged via customized, automated SMS messaging or telephone call.**
- **Messages are sent in batches at 15-minute intervals to accommodate staffing schedules and workload.**
- **Patients can choose to connect to a scheduler in real-time or can elect to receive a call back.**
- **Calendar appointments are automatically written back to the patient record.**
- **For patients not scheduled after receiving two automated messages, a manual task is then created.**

During just its initial deployment, Froedtert was able to engage approximately 1,800 contacts, turning a multi-week process into a three-day referral-to-appointment workflow. Based on this success, the organization expanded its campaign from just three departments to more than 30 specialties within a matter of weeks.



Getting Started

Health systems looking to adopt this approach will want to first identify the most time-consuming, high-volume referrals—whether by specialty type, referring providers or patient segment. These types of referrals create the largest staffing burdens and likely have the lowest closure rates. It is also essential to identify referral types where there is capacity, and delays are creating inefficiency. Connecting early to manage patient expectations also helps diffuse would-be frustration.

Automating referral engagement creates a better patient experience and improves care. It can also improve financial performance for health systems by reducing the revenue leakage associated with open referrals and those on sunset status, and improving regulatory and value-based care metrics. Savvy health IT leaders recognize the value automated patient engagement can lend and are helping healthcare organizations identify EHR integrated patient engagement platforms that can support a healthy referral management process. If you're ready to modernize your referral management workflows to close more referrals and improve the referral experience for patients and staff, please contact us or call (800) 644-4266.

Sources:

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