

# Revolutionize referrals management

Retain referrals & realize significant annual revenue with AI-powered automation

## Reduce revenue leakage & increase patient engagement

Manual referral intake and outdated communication methods lead to delays and errors. Limited interoperability and a lack of real-time data tracking contribute to referral leakage, missed appointments, and poor care coordination. This results in disruptions to patient care and significant revenue loss.

Automated referral intake routes patients to in-network specialists and tracks appointment adherence. Real-time analytics reduce leakage and improve care coordination, driving significant annual revenue through retained referrals. By eliminating manual processes and enhancing visibility, healthcare organizations ensure timely referrals and better patient outcomes while optimizing operations.

## U.S. Healthcare Organization



**\$20M**

Incremental patient revenue

**<24 hrs**

Same day turnaround

### Systems impacted:

- EHRs
- Referral management software
- Insurance portals

## The benefits of AI-powered automation



### Revenue retention

Prevent revenue leakage by ensuring referrals stay within the network and increase financial stability.



### Patient retention

Effective referral management ensures patients receive timely and coordinated care, fostering trust and satisfaction. By keeping patients within network and providing seamless experiences, organizations can build loyalty, reduce churn, and enhance revenue.



### Cost savings

Streamlined processes and reduced manual tasks lead to cost savings, while efficient referrals support value-based care models by optimizing resource allocation.



### Seamless information exchange

Electronic referrals facilitate better communication between primary and specialty care providers, ensuring continuity of care.

# Evolution of referrals management with AI-powered automation

Whether your referrals management process is fully manual or partially automated, you can do more with UiPath. Use the chart below to benchmark your progress and discover the technology that can support your automation journey.

## Manual



## Utilizing RPA

RPA RPA opens the referral either using the user interface or an API. Finds or creates customer and enters referral information in the EHR once validated by staff.



## Utilizing RPA and IDP

RPA & IDP reviews and classifies documents included in the referral. Identifies any needed missing information. Initiates outreach to provider for any missing information.



## Utilizing agentic automation

Agentic automation reviews provided referral information and determines if a medical review is needed. Makes a medical review recommendation with links to supporting data for employee review.



Manual effort: Automation: Employee review (if needed):

RPA - Robotic Process Automation  
IDP - Intelligent Document Processing

## Why UiPath?

The UiPath Platform™ enables AI agents, robots, people, and models to work together harmoniously to revolutionize healthcare. Create a new reality for referrals management with:

**Automated eligibility checks:** UiPath can verify patient eligibility for referrals.

**Enterprise integration with EHRs:** Seamlessly extracts and updates referral information in EHRs.

**Customizable workflows:** Allows for tailored referral management processes.

**Medical record summarization capabilities:** Enable seamless communication between providers by offering a clear overview of patient histories, ensuring timely and accurate referrals.

## Ready to take the next steps?

[Contact us](#) to get started with AI-powered referrals management today.

