

How a Healthcare Company Automated Referral Management and Medical Document Processing

Powered by Cloud Maven, Inc Fax Hub and Document Insight

\$420K

Annual Savings

Estimated annual workforce cost reduction

95%

Same Day Processing

Up from a 1–2 day turnaround

11 to 4

FTE Requirement

Reduced document-processing workforce

CLIENT & PROCESS CONTEXT

Our client, a transformative healthcare company, specializes in non-pneumatic sequential compression garments for venous and lymphatic care in the legs and arms. Operating on a high-volume document workflow, the business depends upon insurance approvals and medical necessity documentation from referring physicians. Every day, referring providers send patient records, diagnostic information, and authorization requests via faxes that must reach the right department quickly.

The organization's back office handles a critical function. The speed at which they process these documents has a direct impact on both patient care timelines and provider satisfaction. Any delays in turning medical paperwork result in bottlenecks in the entire system, causing frustration among all parties involved.

THE BUSINESS CHALLENGE

Most of the team's time is spent managing and handling incoming faxes. The staff members have to first download files, identify the document type, manually enter data, tag each record with relevant patient information, and upload everything to the system. Processing one fax alone requires 28 minutes of employee labor. On average, the team receives 160 faxes per business day.

The workload distribution was uneven. Incoming documents sit in queues waiting to be processed by staff. Many providers call and ask if a particular document has been received. There is also much confusion regarding the status of the documents, how many successfully received, which ones failed, and what happened to missing files. Also the staff members downloaded files containing sensitive patient health information to their personal devices, which create compliance exposure.

- Constant manual intervention needed for reception and routing of incoming fax documents.
- Data regarding patients and their providers had to be manually pulled from a variety of sources and entered into multiple systems.
- Inbound fax documents often came in incomplete or lacking critical supporting documentation.
- There was no visible record of lost or failed fax transmissions.
- Without an automated alert system, staff members could not detect when faxes failed to send.
- Staff downloaded sensitive health records to personal devices or local computers daily.

WHY CHANGE WAS NEEDED

- 1 Labor intensive**
28 minutes required to process each fax
- 2 Processing bottlenecks**
Incoming faxes waited in queues for manual handling
- 3 Limited visibility**
Failed, missing, and pending faxes were difficult to track
- 4 Manual data entry**
Patient and provider information entered across multiple systems
- 5 Compliance exposure**
Sensitive health records downloaded to local devices

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THE CLOUD MAVEN, INC SOLUTION

Cloud Maven, Inc implemented its Fax Hub solution along with Document Insight. The solution automatically identifies document type, assigns patient ID's, and captures provider details as it processes incoming faxes. Data gets extracted from specific Salesforce records and fields that are linked to them.

CORE CAPABILITIES

The solution handles large documents up to 100 pages. Should any issues arise during transmission, users receive real-time notifications regarding the problem. Providers and patients receive emails or notifications on the status of their faxes and next steps.

Since all the processing occurs within Salesforce, there is no need for staff members to download anything on local or personal devices.

IMPLEMENTATION APPROACH

Cloud Maven, Inc team collaborated with the healthcare company throughout the transition. Training sessions were conducted for the personnel. Once implemented, the new workflow went live with full support from our team.

"Their team understood our urgent timelines and worked fast to get us live. They continue to support us and respond quickly to any questions we have."

- **Operations Director**

BUSINESS RESULTS

The automated fax and document-processing workflow transformed a labor-intensive process into a faster, more visible, and secure operation with measurable improvements across cost, turnaround time, and staffing.

\$420K

annual cost savings

1-2 days to same day

fax processing turnaround

11 to 4 FTE

document-processing staff

- Provider and patient inquiries **dropped by 80%** through automated status notifications and improved visibility
- Real-time dashboards provided visibility into incoming fax volumes and transmission failures
- Automated classification and tagging virtually eliminated document categorization errors
- Salesforce-based processing eliminated local file storage and strengthened HIPAA compliance

Learn more: solutions@cloudmaveninc.com | +1 (740) 470-0000 | [Book a demo](#)