Optimizing Handling of Provider Referral and Medical Necessity Documents

A Case Study on CM's eFax and Document Insight Solution

CLIENT OVERVIEW

Our client, a transformative healthcare company, specializes in non-pneumatic sequential compression garments for venous and lymphatic care in the legs and arms. These garments require insurance or payer funding, necessitating the submission of medical necessity documents and referral orders. These include patient details, diagnostic and HCPCS codes, insurance and health plan details, and referring provider information. The handling of these documents posed significant challenges for the client, particularly in managing the faxed submissions from provider offices to the client's systems.

CHALLENGES

The client faced several critical issues:

- **High Labor Costs:** Managing fax reception, downloading, classification, tagging, indexing, data entry, and document uploads required 11 full-time employees (FTEs), consuming 28 minutes per fax with a daily volume of 160.

- **Delayed Processing:** Turnaround time from fax reception to data entry and upload was 1-2 days due to unequal workload distribution and lack of automation, leading to frequent provider and patient inquiries.

- **Document Handling Errors:** Manual processing resulted in errors such as incorrect account uploads, misclassification, incomplete document sets, and metadata tagging errors, including missing uploads.

- **Inefficient Tracking and Governance:** Significant managerial effort was needed to track workloads, reconcile documents, and handle inquiries about document receipt, lacking visibility into lost business due to untracked fax reception failures.

- **Security Concerns:** Inbound documents containing PHI/PII data were downloaded to local machines by the 11 FTEs, posing a security risk and potential HIPAA non-compliance if data was not deleted post-upload.

SOLUTIONS

Cloud Maven deployed its eFax solution with OCR (Optical Character Recognition) capabilities, known as Document Insights (DI) which used advanced ML/AI models:

- ✅ **Document Classification and Tagging:** Automatically classified document types and tagged documents with metadata (provider ID, patient name, document type, and received date).

- ✅ **Data Parsing and Ingestion:** Parsed and ingested patient, provider, insurance, and order details for seamless document uploads.

- ✅ **Efficient Management and Governance:** Featured list views and email notifications to manage workloads. Linked the confirmation of received status to trigger email/SMS communications to providers and patients.

- ✅ **Reduced Touchpoints for PHI Data:** Enabled reception within Salesforce, eliminating the need for local drive downloads and reducing the PHI data footprint.

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BENEFITS

Implementing Cloud Maven's eFax solution resulted in:

Annualized OPEX Reduction:

Reduced FTE count from 11 to 4, saving approximately 420K USD annually.

Improved Delivery and Faster Turnaround:

Reduced fax reception to data entry and upload time from 1-2 days to instant completion in 95% of cases, decreasing provider and patient inquiries by 80%.

Enhanced Quality:

Automated classification, tagging, and parsing eliminated errors and ensured all received faxes were processed.

Improved Governance and Tracking:

Dashboards and list views provided visibility into volumes received/failed and timely exceptions. SMS and email-triggered communications improved the experience for providers and patients.

Enhanced PHI Data Security and HIPAA Compliance:

With 95% of documents ingested directly into Salesforce and only exceptions handled by 4 FTEs, the solution minimized the PHI data footprint and ensured HIPAA compliance.

CONCLUSION

Cloud Maven, INC.'s eFax solution revolutionized the client's document handling process, reducing operational costs and enhancing efficiency. The automated system improved document quality, governance, and security, ensuring faster turnaround times and better compliance with HIPAA regulations. This transformation optimized resource utilization and significantly enhanced the experience for providers and patients, showcasing the impact of Cloud Maven's innovative solutions on healthcare operations.

$420K
Annual cost saving

80%
Fewer inquiries

95%
Instant Processing

95%
Secure Data Handling

SMS & Fax Guru

SMS
eFAX

Most advanced SMS messaging & eFax for Salesforce

→ Two-way messaging with dynamic templates, incoming alerts, and MMS.

→ Send and receive HIPAA and HITRUST-compliant faxes in Salesforce with tracking.

→ Engage customers using keyword-based automated messages and AI responses.

→ Automate SMS/MMS via AI, triggers, workflows, and process builders.

→ Send personalized SMS to multiple recipients from list views, campaigns, and reports.

→ Send and receive HITRUST & HIPAA-compliant SMS via the Salesforce mobile app.

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