

Centralizing Intake

Overview

In early 2016, Mission Healthcare needed to improve its intake process in order to connect all of the different teams and processes throughout the large California home health and hospice organization. After assessing its existing processes and technology, Mission centralized intake using Forcura's Intake & Referral Management tool, allowing the agency to route inbound documents through a streamlined workflow directly into Homecare Homebase.

About Mission

Mission Healthcare offers Home Health, Home Care and Hospice throughout the greater San Diego, Temecula, Riverside, San Bernardino, Ventura, and Palm Springs areas. The organization was founded in 2009, and is clinically-owned and operated by a passionate team of experts dedicated to elevating patient care, improving efficiency, and reducing healthcare costs.

Challenges

With a large service area and multiple office locations, Mission Healthcare needed to change its intake processes to keep things organized and aligned as the organization grew. The process it had originally developed was very labor intensive and provided little transparency. Challenges surrounding intake included:

- Email-heavy processing and communication
- Little referral status transparency for management and sales teams
- Multiple decentralized intake fax lines
- "All-hands" workflow without defined structure
- Burdensome process for following up on referrals

With numerous fax lines and email inboxes to manage, the sales team feared that some referrals weren't being processed effectively and management worried that the referrals could be missed on

occasion. Referrals requiring extra attention interrupted an already complex process.

Solution

After receiving a full assessment of its business processes from BlackTree Healthcare, the Mission team determined that its intake process needed a redesign. Mission engaged with Forcura to maximize the efficiency of their existing EHR, Homecare Homebase. Together the teams designed a streamlined and centralized process using the Forcura Intake & Referral Management tool as the connecting technology.

- Developed a strategic intake plan and process using Forcura
- Centralized fax lines and channeled all referrals into one place
- Built custom workflows in Forcura to define staff responsibilities and track productivity
- Tracked referrals at all stages of the Intake process, using document tags and dashboard metrics
- Managed referrals requiring additional work flows simultaneously with routine referrals
- Implemented an easy follow-up process with activity logging
- Integration with Homecare Homebase instantly attaches referrals and other intake documents to the patient chart

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Our centralized intake is now streamlined and managed in one place thanks to Forcura. We are now able to better manage team members productivity and collaboration with all incoming referrals.

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Gigi Escobosa, Customer Resource Manager

Results

Mission’s redesigned intake process gave the home health and hospice organization the transparency and structure it needed to scale. Referrals could be processed at the same time and followed up on in a more streamlined fashion.

The centralization of intake through Forcura means that the Mission team no longer relies on email to communicate and organize referrals. Transparency has helped the team determine acceptable timelines and set escalation levels for referrals. In addition, the sales team is empowered by being able to check on referrals at any stage during the intake process instead of having to wait until they were attached to the patient chart in Homecare Homebase.

BENEFITS

100%

Paperless Process

\$140K

Annual Savings

90%

Attachment time savings to HCHB

50%

Improved efficiency

ALONG WITH

Full transparency – no referrals are missed

Reduced intake staffing as a result of automation and efficiency gains