



EDUCATIONAL RESOURCES

Building a Strong Foundation

How Home Health and Hospice Agencies Can Use AI to Improve Referral & Intake Processes

 HOME HEALTH



ACHCU IS A BRAND OF ACCREDITATION COMMISSION *for* HEALTH CARE



Agenda

- Why Strong Processes Matter
- Technology as a Support, Not a Shortcut
- How Agencies Can Use AI Effectively
- Best Practices for Agencies Looking to Use AI

Why Strong Processes Matter

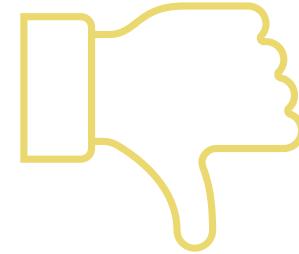
- ACHC certification is about structure and compliance - it ensures agencies have standardized, repeatable, and audit-proof processes.
- Common pitfalls of weak referral workflows:



Missing
documentation
leading to delayed care.



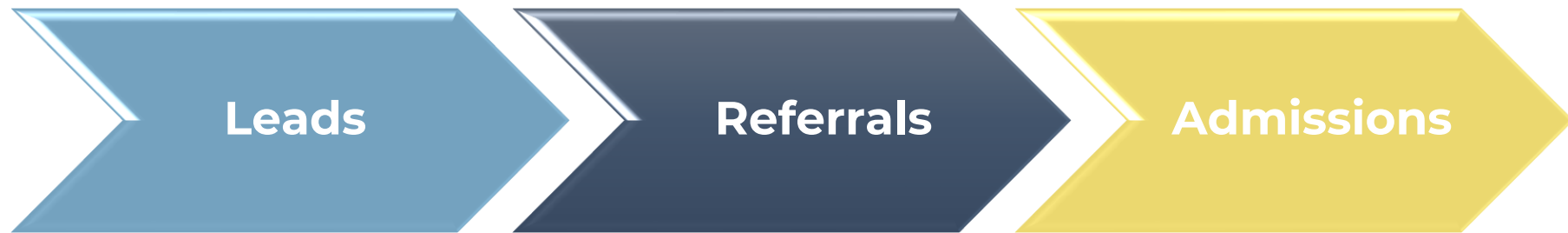
Compliance risks,
including penalties or
payment delays.



Inefficiencies that
frustrate staff and
referral partners.

Referral & Intake as a Strategic Priority

- Referral & Intake is a gateway to: revenue, care delivery, and reputation.
- A delayed or missed referral is a missed opportunity and potentially lost patient.

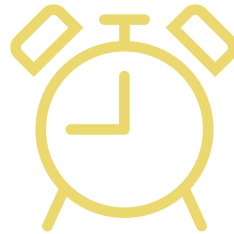


The Hidden Costs of Inefficiency

- When agencies are not efficiently handling intake, it can cause:



Labor waste from chasing down missing info.



Referrals sitting untouched for hours.



Referral sources losing confidence in your agency.

What "Strong Processes" Actually Mean

- **Defined roles and routing**
 - Everyone on the intake team knows what they're responsible for
 - Referrals are automatically routed to the right person
 - Eliminates delays caused by unclear ownership or internal bottlenecks



What "Strong Processes" Actually Mean

- **Timely intake response targets**
 - Agencies set clear, measurable expectations
 - Time-based accountability ensures no referral is overlooked
 - Improves referral source satisfaction and boosts conversion rates



What "Strong Processes" Actually Mean

- **Checklist-driven intake**
 - Every referral follows a standardized checklist to confirm all required information is received (demographics, physician orders, insurance, etc.)
 - Reduces variation between team members and locations
 - Helps ensure compliance and simplifies onboarding of new staff



Technology as a Support, Not a Shortcut

- AI and automation can enhance referral and intake efficiency, but they don't replace good processes.
- **Misconceptions about AI:**
 - “AI will solve our referral problems instantly.” → Not without strong workflows.
 - “AI replaces human decision-making.” → AI supports but does not replace expertise.
- **What AI can do vs. what it can't:**
 - Automate repetitive tasks, reduce errors, and flag missing documentation.
 - Cannot establish compliance-driven processes - agencies must already have these in place.

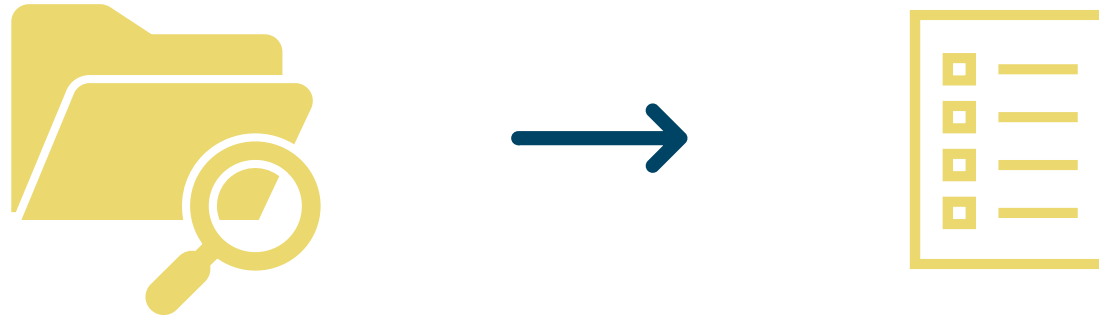
What AI Can Do: Referral Prioritization

- AI can sort referrals into triage queues based on urgency or relevance
- Agencies can set their own rules for what "priority" means
- **Example:**
 - High-acuity patient flagged first
 - Out-of-coverage patient flagged for review



What AI Can Do: Referral Summaries

- AI can scan and summarize referral packets into digestible a digestible format.
- Reduces "document shuffle" time for intake teams.



What AI Can Do: Referral Grading

- AI can grade referrals based on fit:
 - Geography
 - Services
 - Staffing
 - Payer
 - Clinical needs
- This helps teams make faster, smarter decisions about whether to accept or decline a new patient

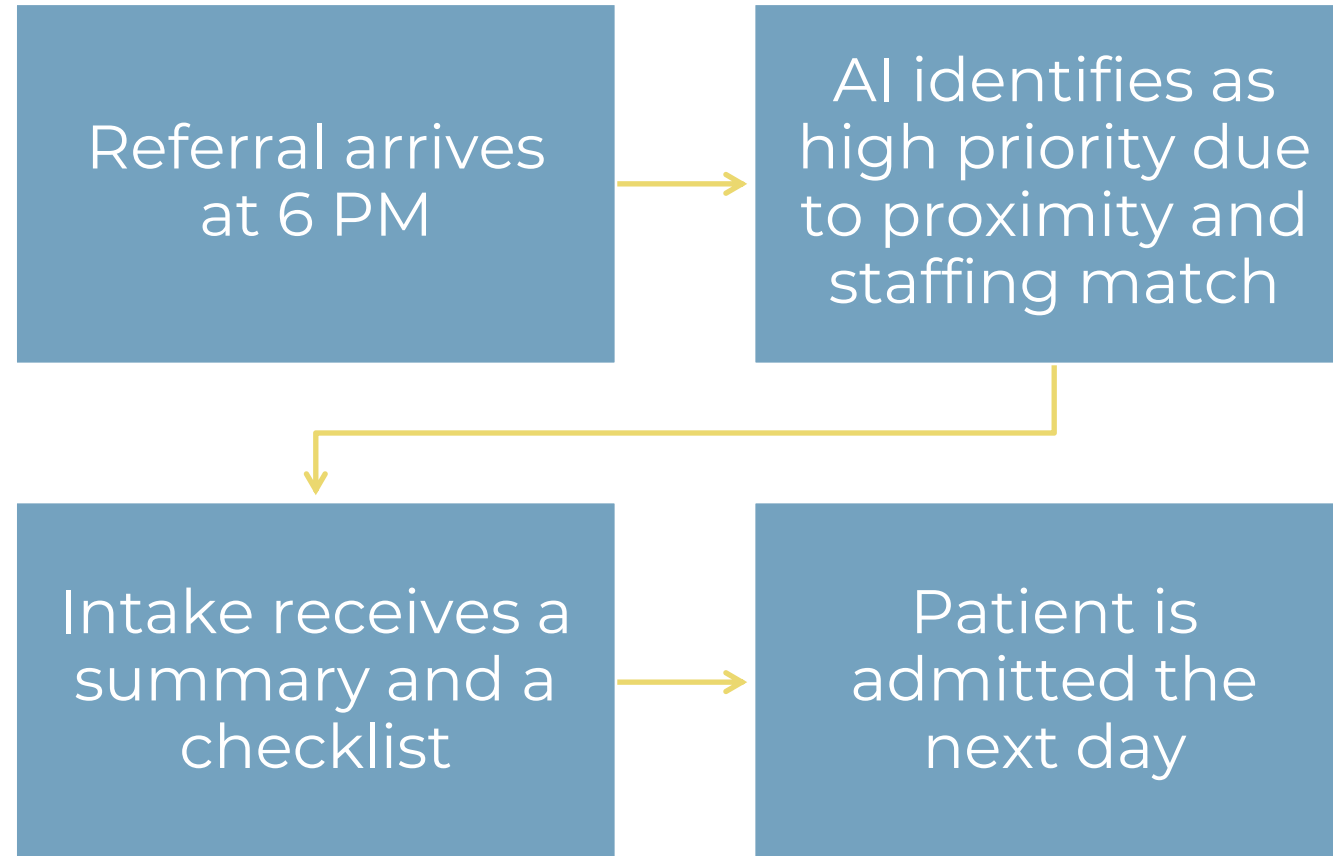


What AI Can Do: Reduce Rework

- With smart flagging capabilities, AI can identify missing components like physician orders or demographics.
- This can auto-trigger templated requests to referral sources or hospital liaisons.



What AI Can Do: Use Case Walkthrough

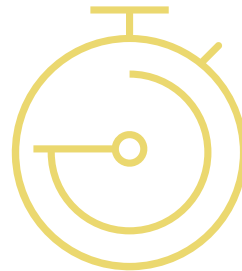


How Agencies Can Use AI Effectively

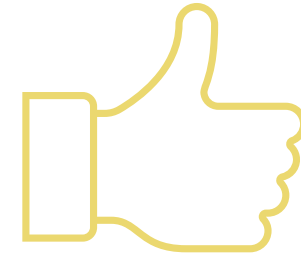
- How AI fits into an agency's workflows:



Ensures documentation is complete before submission.



Speeds up referral intake while maintaining compliance.



Reduces administrative burden so staff can focus on patient care.

Best Practices for Agencies Looking to Use AI

- **How to evaluate if an agency is AI-ready:**

- Are referral workflows well-documented?
- Are there clear staff roles in the intake process?
- Is there a need to reduce administrative burden while maintaining accuracy?



Best Practices for Agencies Looking to Use AI

- **Steps to introduce AI without disrupting processes:**
 - Start with small automation tools before full AI integration.
 - Keep compliance and staff training at the forefront.
 - Regularly audit AI-driven processes for accuracy and adherence to standards.



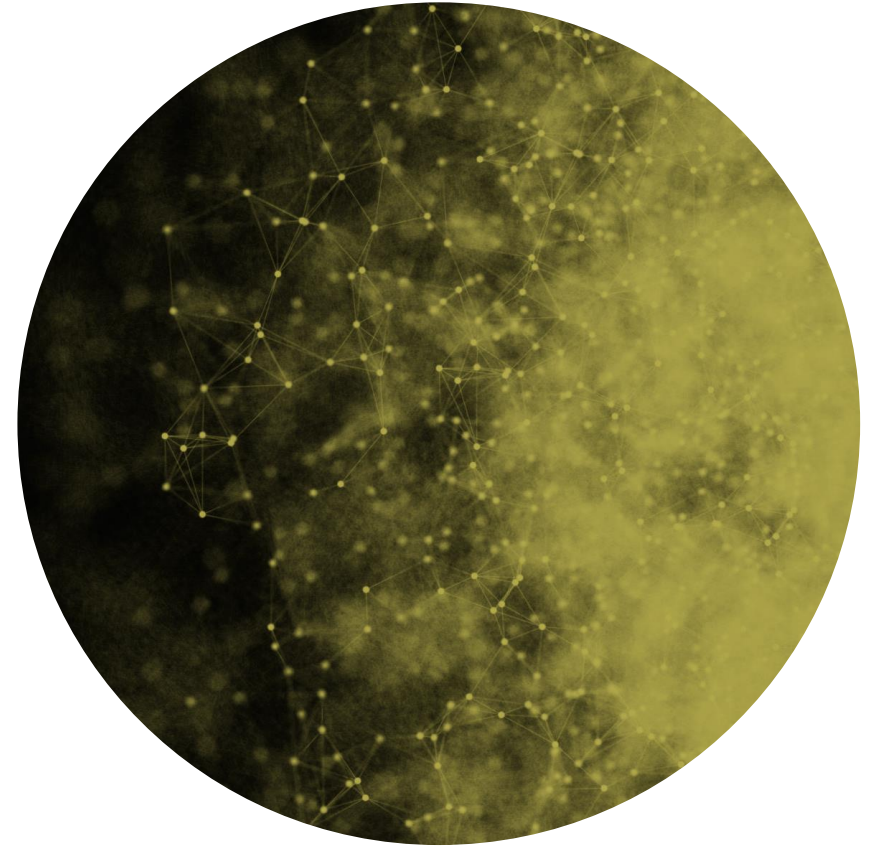
Best Practices for Agencies Looking to Use AI

- **Training staff for AI adoption:**
 - Make AI a tool to support expertise, not replace it.
 - Provide real-life scenarios where AI improves workflow efficiency.
 - Encourage staff feedback and adjust AI usage based on real-world needs.



Getting Started with AI

- A few things that are key when utilizing AI for the first time:
 - Your referral data must be **clean**
 - Your team must have **defined intake criteria** and **response targets**
 - AI needs **past data** to "learn" what a good-fit patient looks like



Thank you

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