



EMR and Revenue Cycle Workflow Portal: Taking the Pain Out of Patient Referrals



Challenge

Pentec Health was experiencing growing inefficiencies in its EMR and revenue cycle workflows. The existing systems lacked the flexibility and visibility needed to manage increasing referral volumes and documentation requirements. Referral tracking was largely manual, with no centralized dashboard to monitor progress or identify delays. This led to inconsistent communication between departments, missed documentation, and slower onboarding of patients. Sales and clinical teams operated in silos, often relying on email threads and spreadsheets to track referral status, which introduced errors and made it difficult to prioritize high-risk or time-sensitive cases.

Solution

Liberty Fox Technologies developed and deployed a dual-platform solution: the RCM Workflow Portal and the Sales Portal. These platforms were designed to streamline referral intake, automate checklist tracking, and provide real-time visibility into referral progress.

The RCM Portal Introduced:

- A centralized dashboard for tracking referral status across all stages.
- Automated checklist workflows to ensure timely document submission.
- Integration with CareTend and Snowflake APIs for seamless data exchange and reporting.

The Sales Portal Enabled:

- Real-time visibility into referral completion metrics.
- RAM (Risk Adjustment Methodology) indicators to help prioritize outreach.
- A unified view of referral activity across territories and teams.

Together, these tools replaced fragmented processes with a connected, data-driven workflow that improved coordination between sales, clinical, and operations teams.

Operating Leverage

The implementation of Liberty Fox's solution delivered measurable improvements across Pentec Health's operations.

Referral processing time was reduced through automation and the elimination of redundant communication.

Physicians and sales representatives gained real-time visibility into referral status, enabling faster follow-up and better coordination. **Cross-functional alignment improved**, with shared access to checklist progress and referral data. **Leadership leveraged Snowflake-powered reporting** to make more informed decisions around staffing, territory planning, and performance tracking. These outcomes enabled Pentec Health to **scale its referral**

operations efficiently while maintaining compliance and service quality.

Technology



"Bill Evans and his associates at Liberty Fox Technologies are trusted, pragmatic, and very experienced technology partners to Pentec Health. His team has delivered numerous comprehensive and well written proprietary applications tightly integrated with our Electronic Medical Record and Revenue Cycle Management System that optimize unique operating leverage opportunities across the organization."

-Tim Leffler

Chief Information Officer

