

Case study
Home Care Industry



**Faster Referrals, Fewer Misses:
Butte Home Health Cuts Referral
Response Time by 70% Using
AutomationEdge CareFlo AI**

About the Client

- Founded in 1984, Butte Home Health & Hospice is a state-licensed, Medicare-certified, nonprofit, community-owned home health and hospice organization based in Chico, California.
- It is dedicated to helping individuals live safely in their homes with comfort, independence, and dignity.

A major challenge was the sheer volume of referrals we were managing. With over 250 referrals coming in every month, our intake team was spending a significant amount of time gathering information from multiple sources and manually entering it into the patient chart for clinicians.

Emily Mumford
Intake Coordinator
Butte Home Health & Hospice

Constant Challenges with Manual Process

- **High Risk of Missed Referrals**

Referrals from referral portals such as Careport, NaviHealth, and the eFax system are accepted on a first-come, first-served basis. Manual processing delays often led to missed referral opportunities because competing agencies responded more quickly.

- **Fragmented Referral Data**

Critical referral information was scattered across multiple PDF documents (e.g., H&P reports, discharge summaries, and home health orders), and faxed referrals that required manual review. This fragmented intake process made it difficult for teams to quickly gather complete information, increasing processing time and operational complexity.

- **Heavy Manual Eligibility Checks**

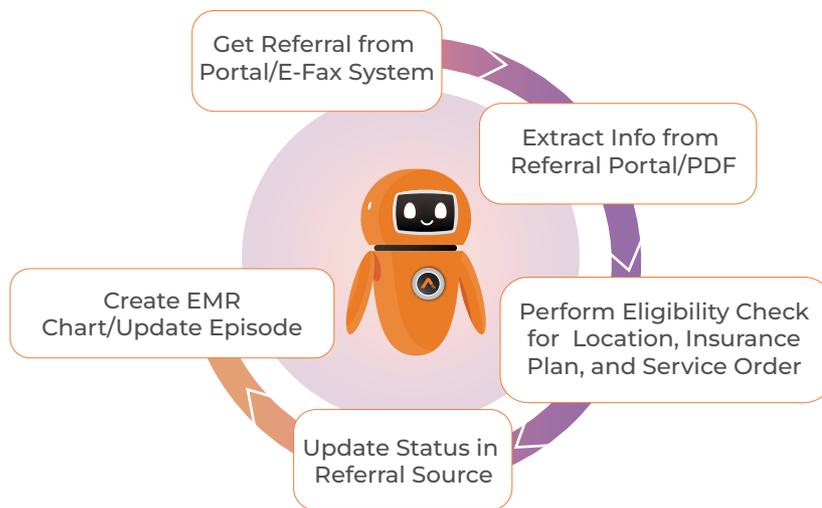
Eligibility verification involved extensive manual effort, including validating patient ZIP codes against service-area boundaries, logging into multiple payer portals, and checking coverage and benefit details across different payer systems. This repetitive, multi-step process significantly increased intake workload and slowed referral decision-making.

Introducing AutomationEdge Referral CareFlo AI at Butte Home Health

Butte Home Health needed a way to manage a growing volume of referrals while reducing manual workload and improving response times—without disrupting existing referral portals or EMR systems. AutomationEdge CareFlo addressed this challenge by introducing a fully automated, AI-driven referral intake and eligibility solution.

Before CareFlo AI, our intake team spent countless hours gathering and entering referral information for clinicians, which significantly slowed the process. With the automated referral summary, everything is pulled together in one place in 5-10 minutes—clearly organized and instantly accessible.

Emily Mumford
Intake Coordinator
Butte Home Health & Hospice



1. Referral Intake Intelligent Triage and Routing

With AutomationEdge CareFlo AI, referral intake is now continuously monitored and automatically processed across all sources. The Referral CareFlo AI:

- Continuously monitors new referrals from Careport, NaviHealth, and inbound eFax queues
- Automatically opens and classifies referrals upon receipt
- Identifies Home Health referrals and excludes Hospice or Palliative-only cases
- Stops processing referrals that are already placed elsewhere or not eligible for Home Health services

This ensures that no referrals are missed and that only qualified referrals proceed for further processing.

2. Referral Data Extraction

Referral information was previously scattered across portals, PDFs, and faxed documents.

AutomationEdge streamlined this by automating data extraction and document handling. The CareFlo AI:

- Extracts complete patient demographics, insurance details, service orders, and clinical information from both referral portal screens and PDFs
- Retrieves data from documents such as H&P, F2F, Discharge Summaries, and Home Health Orders
- Automatically downloads and combines all referral documents into a single, standardized PDF
- Applies consistent naming conventions and intelligently handles multiple patients within a single fax

This automation delivers complete, structured referral information to clinicians with no manual effort.

My experience working with the AutomationEdge team has truly been nothing short of fantastic... they have been just so knowledgeable and helpful and supportive in walking me through and my whole team through the implementation and everything from the process mapping to working on all of those mapping sheets.

Emily Mumford
Intake Coordinator
Butte Home Health & Hospice

3. Eligibility Check

AutomationEdge CareFlo automated this critical function end-to-end. The CareFlo AI:

- Validates patient ZIP codes against defined service-area mappings
- Logs into multiple payer portals (Inovalon, Carelon, Availity, UHC) to verify coverage
- Confirms active plans, Home Health benefits, plan dates, copays, and network status
- Downloads and stores payer eligibility reports directly within the patient record
- Flags referrals for manual review when exception keywords, caution flags, incomplete data, PO Box addresses, or exception patient criteria are detected

4. Decision & Referral Portal Update

Once eligibility checks are completed, AutomationEdge applies rule-based logic to determine the appropriate outcome. The CareFlo AI:

- Automatically accepts eligible referrals, updates the referral portal, and proceeds with EMR processing
- Declines ineligible referrals with standardized reasons and portal updates
- Flags complex cases as Decision Pending Review and notifies the intake team
- Inserts contextual comments automatically based on the referral outcome
- Monitors placement status and alerts the intake team if a referral is placed elsewhere

5. EMR System Update

For accepted referrals, AutomationEdge CareFlo seamlessly integrates with the MyUnity EMR to complete downstream processing. The CareFlo AI:

- Identifies whether the patient is new, discharged, transferred, or in pre-admit/admit status
- Creates new patient charts or initiates Resumption of Care (ROC) workflows as appropriate
- Updates demographics, insurance, PCP, location of service, allergies, and referral details
- Uploads referral documents and payer eligibility reports directly into the patient chart
- Notifies intake staff when manual intervention is required for specific patient statuses

The automated summary has been beneficial for many different reasons. Laying everything out really, really nicely for the clinician to just kind of take a quick glance at everything and get their bounds at where their patient is at. We really like having the page numbers so we can jump right to page 39 and see exactly what we need.

Emily Mumford
Intake Coordinator
Butte Home Health & Hospice

Life with AutomationEdge CareFlo AI



Faster Referral Response

24/7 referral assistance and referral capture enable Butte Home Health to respond within the critical referral window and secure first-come-first-serve opportunities.



Automated Referral Summarization

Faster referral data consolidation and summarization enabled clinicians to quickly understand a patient's condition and care needs.



Reduced Intake Processing Time

What once took 45+ minutes now takes 5–10 minutes for clean referrals. Intake teams review instead of build referrals, freeing time for higher-value coordination work.



Zero-Touch Eligibility & Risk Reduction

Automated ZIP validation and payer eligibility checks ensure consistent decisions while reducing the risk of accepting ineligible referrals.



Seamless EMR Integration

With an automated EMR system, creating or updating patient charts enabled faster Intake workflows without switching between systems.

About AutomationEdge

AutomationEdge CareFlo is an **AI agent for home and post-acute care**. Our AI agents use AI, RPA, NLP, and IDP tools for end-to-end automation. Streamline the intake-to-revenue cycle management process to enhance the experiences of clients, clinicians, caregivers, and staff. AutomationEdge is a trusted choice for industry leaders like Elara Caring, Bridge Home Health, Home Assist Health, Devoted Guardian, and the University of Maryland Medical System (UMMS). Our innovations boost efficiency by 90%, cut costs by 50%, and simplify care.

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