FractionalExec

Healthcare Automation Case Study

Modernizing Home-Infusion Referral Intake and Care-Team Coordination

2026 | Home-infusion services

Challenge

A growing home-infusion provider handled referrals through email, fax, shared folders and manual coordination. Patient matching, document routing and episode-of-care workspace creation involved multiple systems, creating delays, exceptions and duplicate-processing risk. The work had to preserve clinical review and patient-identity safeguards.

Approach

- Mapped referral intake and episode workflows with operations leaders; connected Microsoft 365, SharePoint, AI-assisted document extraction and the CareTend patient system.
- Introduced structured intake records, patient/MRN matching, exception handling and automatic Teams episode workspaces.
- Tested multi-document referrals, duplicate protection, recovery and managed releases before production promotion.
- Maintained human review for ambiguous identity, missing information and consequential clinical decisions.

Engagement Milestones

Phase	Key Activities
Design & validate	Documented intake fields and workflow rules; built and tested the initial referral pipeline.
Operational rollout	Moved core intake and episode-workspace automation into controlled production releases.
Stabilize & improve	Tested failure recovery, multi-file routing and duplicate safeguards; prioritized exception reduction.

Artifacts Delivered

- Referral Intake Log and exception-review process
- Patient / episode matching and Teams workspace automation
- Controlled release tests, fallback and operating guidance

Lasting Impact

The engagement moved referral processing from disconnected handoffs into a coordinated intake-to-episode workflow. In controlled multi-document testing, five referral files were processed under one patient and episode; the exception case was reviewed and resolved, while subsequent documents reached the existing care-team workspace. The result was a production-oriented foundation for safer patient matching, clearer team coordination and continued reduction of manual work.