

How AdventHealth made every intake minute count

Challenges

- Reviewing referral packets often exceeding 100-200 pages
- Manual qualification processes and time spent searching for qualifying information
- Human error risks and limited visibility into documentation issues
- Delays caused by multiple manual touchpoints

Solution

Intelligent Document

Automation

where efficient intake meets streamlined qualification

AdventHealth Respiratory and Equipment, based in Longwood, Florida, provides a wide range of HME services, including oxygen, CPAP therapy, ostomy supplies, CGM supplies, and compression products. As part of the AdventHealth network, which serves nearly nine million people each year through more than 2,000 care sites nationwide, the organization is always looking for ways to improve operational performance while helping patients get the equipment and supplies they need as efficiently as possible.

When referral volume meets document overload

Processing referrals wasn't a small task. Teams routinely handled 110-130 new orders per day, with some referral packets containing 100-200 pages. Intake and qualification specialists manually searched through extensive documentation to determine whether required information was present.

The process required multiple touchpoints, consumed valuable time, and increased the likelihood of errors. In some cases, conflicting documentation wasn't identified until later in the revenue cycle process.

"It could be that multiple orders come through with more than 100 pages. With one customer service representative manually reviewing all these documentations, errors are prone to happen. So that was one of the biggest challenges," stated Yoki Ruiz, Director, Revenue Cycle at AdventHealth Respiratory and Equipment.



80%

reduction in time savings per order*

Only **3** minutes each

*Customer results may vary

Designed for the way HME teams already work

As AdventHealth Respiratory and Equipment explored automation technology, the team evaluated multiple options. What stood out about Intelligent Document Automation was its ability to work within the Brightree system employees already used rather than requiring an entirely separate process.

The rollout required adjustments, particularly for employees who had spent years working referrals the same way. Leadership invested in training, created custom guides, and helped teams understand how automation could support their work. Once employees began using the solution, adoption accelerated.

Rather than searching through hundreds of pages, teams could quickly identify intake and qualification issues and focus on next steps.

“Change can be challenging. But once teams started getting immersed and actually seeing Intelligent Document Automation and working with the solution, there were a lot of comments about it being a lot faster,” said Jami Duval, Supervisor, Intake Team 1 at AdventHealth Respiratory and Equipment.

Three minutes and more room for what matters

The impact was felt quickly across intake and qualification workflows.

Teams gained clearer visibility into why referrals didn’t qualify, helping them spend less time investigating issues and more time moving orders along. Leadership gained broader visibility into intake operations, while employees were able to dedicate more attention to insurance verification, authorizations, and other high-value activities.

The organization also saw meaningful efficiency improvements. Tasks that previously required 15 to 45 minutes per order were reduced to approximately three minutes per order. With less time spent performing manual data entry and reviewing documentation, employees had more time for other priorities and cross-training opportunities. Most importantly, teams felt the difference in their day-to-day work.

“The first week after implementation, we were seeing a reduction from 15-45 minutes per order to approximately three minutes per order,” explained Jami Duval, Supervisor, Intake Team 1 (Intake Coordinators) at AdventHealth Respiratory and Equipment.

AdventHealth Respiratory and Equipment’s results to date

Reduced time from 15-45 minutes to approximately 3 minutes per order in some workflows

Gained greater visibility across intake and qualification workflows

Increased transparency across intake and revenue cycle operations

(Customer results may vary)

For AdventHealth Respiratory and Equipment, Intelligent Document Automation helped simplify intake and qualification workflows. With less time spent reviewing documentation and greater visibility into qualification requirements, teams could process referrals faster, focus more attention on insurance verification and authorizations, and gain a clearer view of work moving through intake.

Contact our experts at 888-598-7797 or visit brightree.com/brightree-intelligent-document-automation/ to learn how Brightree’s Intelligent Document Automation can help reduce time spent reviewing referral documentation, improve visibility into qualification issues, and support a more efficient intake process.