Auto Casualty, Workers' Comp

5 Ways to Double Your Productivity Gains from Referral Engine

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Double-digit productivity gains in claims operations are achievable, but rarely fully captured. The difference comes down to execution. Referral Engine is the foundation, but performance gains are driven by intentional configuration and workflow alignment. Here are five simple configurations that will instantly boost your team's productivity.



Prioritize Your Best Vendors

Identify which partners deliver on speed, quality and outcomes. Then use the customizable rules to steer referral volume to your highest performing vendors.



Automate Where Decisions Don't Add Value

Referral Engine can be automated to make routing decisions for common, repeatable scenarios that do not need human input. By automating referral routing for select types, regions or thresholds, you reduce manual decision making and free up claim handlers to focus on higher-impact decisions. This automation reinforces your strategy, not replace it.



Eliminate Follow-Up with Workflow Triggers

Industry estimates suggest claim handlers can spend up to 20–30% of their time on status checks and follow-ups. Use AutoNotify rules to automatically notify claim handlers when documents are returned, or better yet, push results directly into the claim system. This removes disruptions and keeps claims moving without manual intervention.



Standardize Inputs with Templates

Pre-configured input templates ensure every referral includes the right data, instructions and documentation upfront, delivering a one-touch experience while maintaining consistency across vendors.



Align Referral Workflows to Your Operating Model

Whether your referrals are handled by claim handlers, centralized teams or a hybrid model, aligning your configurations accelerates consistency and performance. For organizations without a centralized model, partnering with a dedicated service team to manage and administer referrals can provide an efficient, ready-made structure.

When workflow, vendor strategy and automation rules are aligned, automation investments can deliver 2–3x greater ROI, enabling payers to scale with Referral Engine without adding complexity.

"Using Referral Engine for case management, IME and peer review referrals creates efficiency and security for referrals. The burden is removed from the associate to gather and load medical documents to the vendor. Security reviews are streamlined and only one tool has to be monitored versus individual portals."

—Casualty Claims Leader of Top 10 P&C Carrier

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