



Improving Community Nursing Referral Flow

Reducing Administrative Burden Through Agentic Automation

About OAS

Established. Embedded. Trusted.

Outsource Automation Solutions (OAS) is a specialist consultancy focused on helping organisations simplify complex operational processes and reduce administrative burden through intelligent automation. The organisation combines operational analysis, process redesign and enterprise automation to improve service delivery while maintaining strong governance and operational safety.

OAS has extensive experience supporting NHS organisations, having worked with more than 24 NHS Trusts and delivered over 70 production automations across clinical and administrative workflows. Using enterprise automation platforms such as Blue Prism, OAS helps healthcare services streamline high-volume operational processes and release capacity for front-line clinical teams.

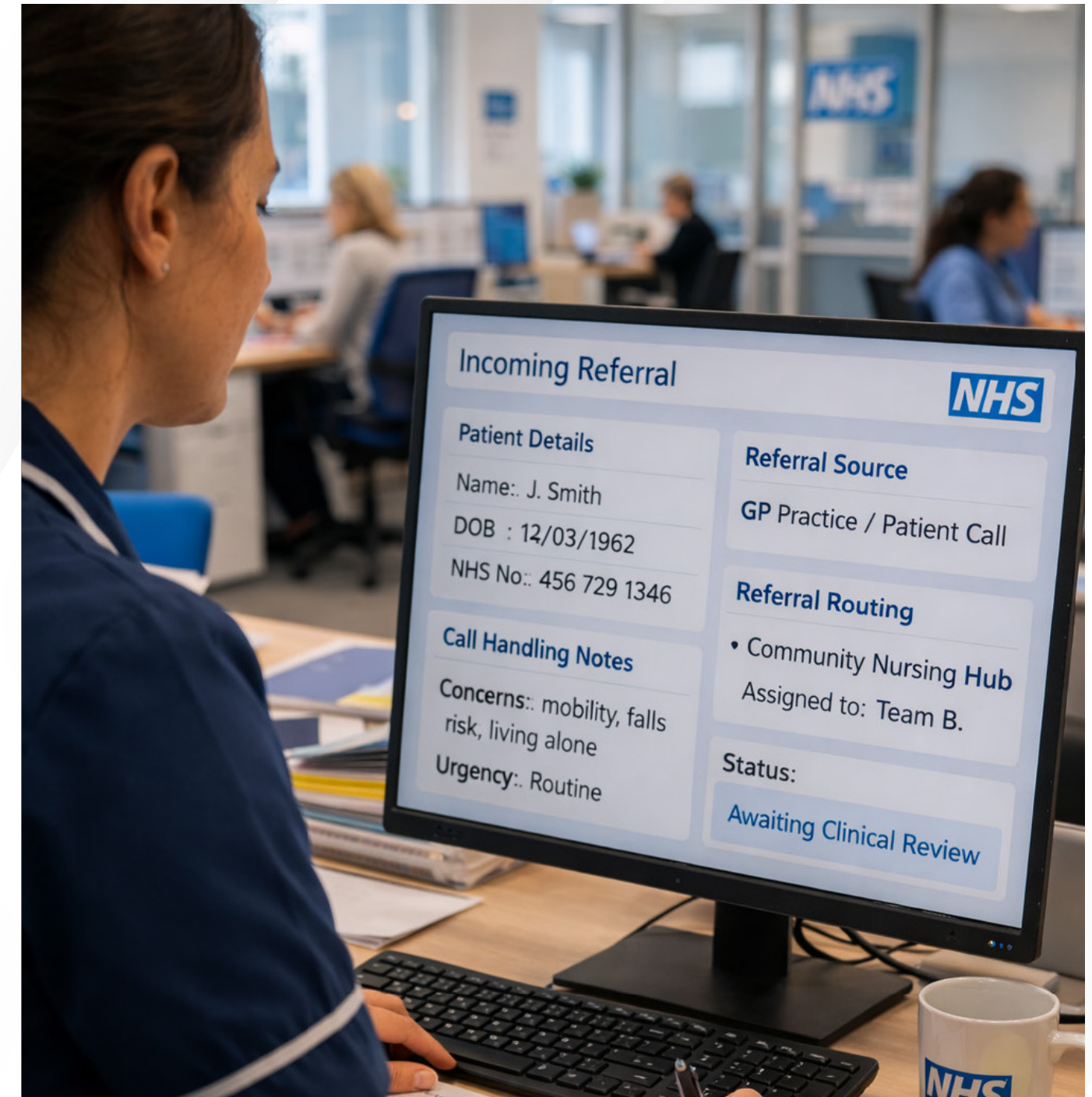


The Challenge in the Current Process

Incomplete Information Capture Can Create Delays

Community nursing services operate within a high-volume referral environment where requests for care enter the system through call handling teams and are routed to operational hubs for clinician review. Administrative staff receive inbound calls, capture referral information and follow a structured triage process supported by a referral form or wizard to determine which operational hub the referral should be directed to. Their role is administrative rather than clinical: they gather information, apply urgency flagging where appropriate and ensure the referral is routed to the correct service for clinical review. The effectiveness of this pathway relies heavily on the quality and completeness of the information captured during this intake interaction.

In practice, a large proportion of referrals arrive without sufficient detail for clinical assessment. As a result, clinicians frequently contact patients directly to gather missing information before progressing the referral. With services receiving several hundred referrals each day and clinicians in many cases contacting patients to complete missing information, a substantial amount of clinical time is spent on administrative clarification and documentation rather than direct patient care.



Why This Matters

Clinician Time Lost Administratively

When clinicians require clarification, the pathway slows. Clinicians must review the referral, contact the patient, gather additional information and manually record the outcome before the referral can move forward. This introduces repeat handling and additional administrative workload into what should primarily be a clinical decision-making process.

Over time, these delays accumulate across the referral pathway. Referrals pause while clinicians complete missing information, increasing work-in-progress within the system and extending the time it takes for patients to progress from referral to care. Improving the completeness of referral information earlier in the pathway can therefore improve operational flow while releasing valuable clinician capacity.

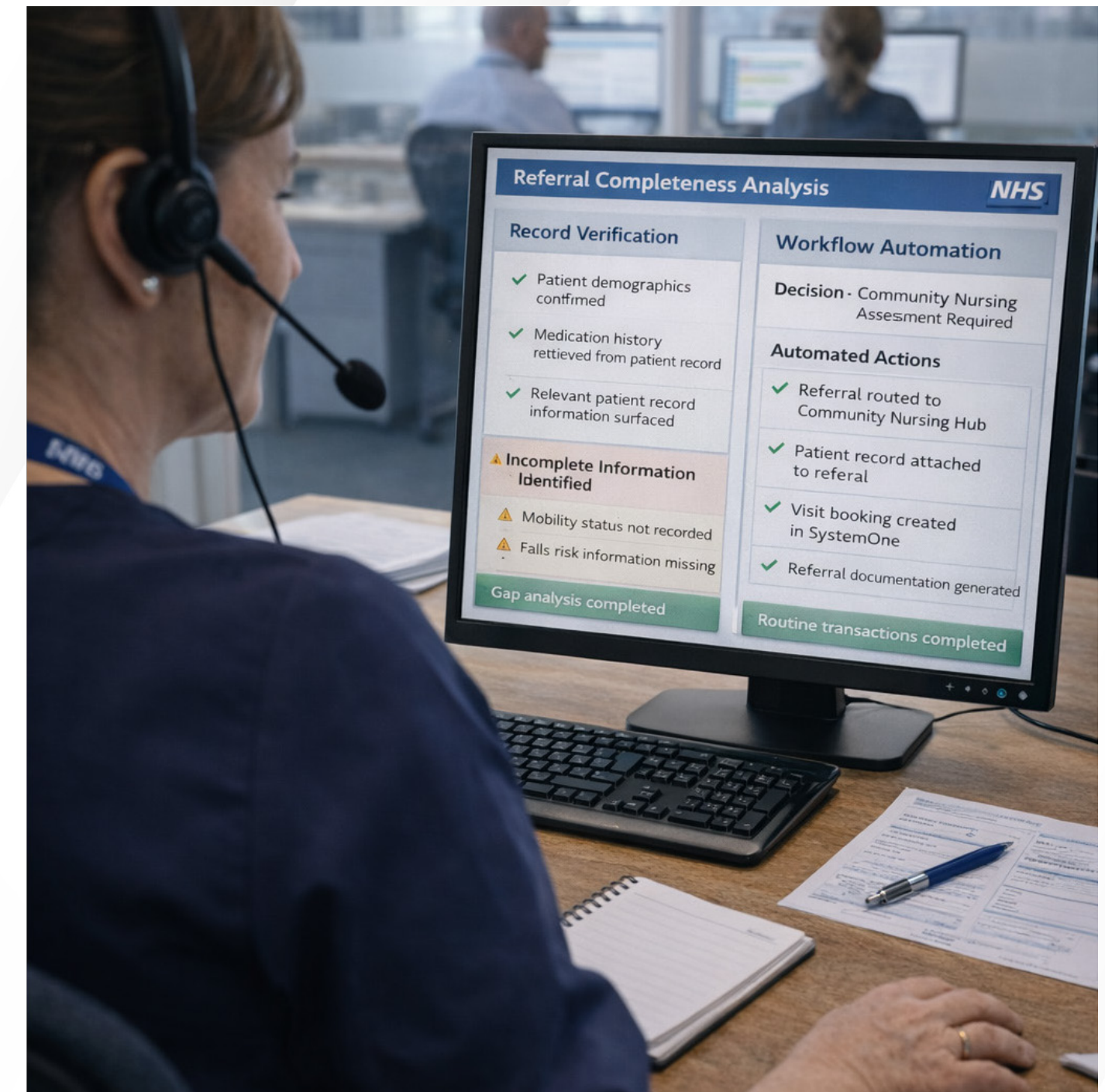


Strengthening Referral Intake

Improving Referral Intake and Capture

Administrative staff currently capture referral information and route cases to the appropriate operational hub. Technology could support this stage through stronger structured referral data capture, rule-based routing assistance, and selective voice automation. A voice agent could answer a proportion of calls, gather structured referral information and route cases according to defined rules, helping to reduce call handling pressure while ensuring more consistent information capture.

These interactions can also be recorded and transcribed, allowing key information from the conversation to be automatically captured and routed to the relevant sections of the referral record. By strengthening how information is captured at the intake stage, referrals can reach clinicians in a more complete and structured form.

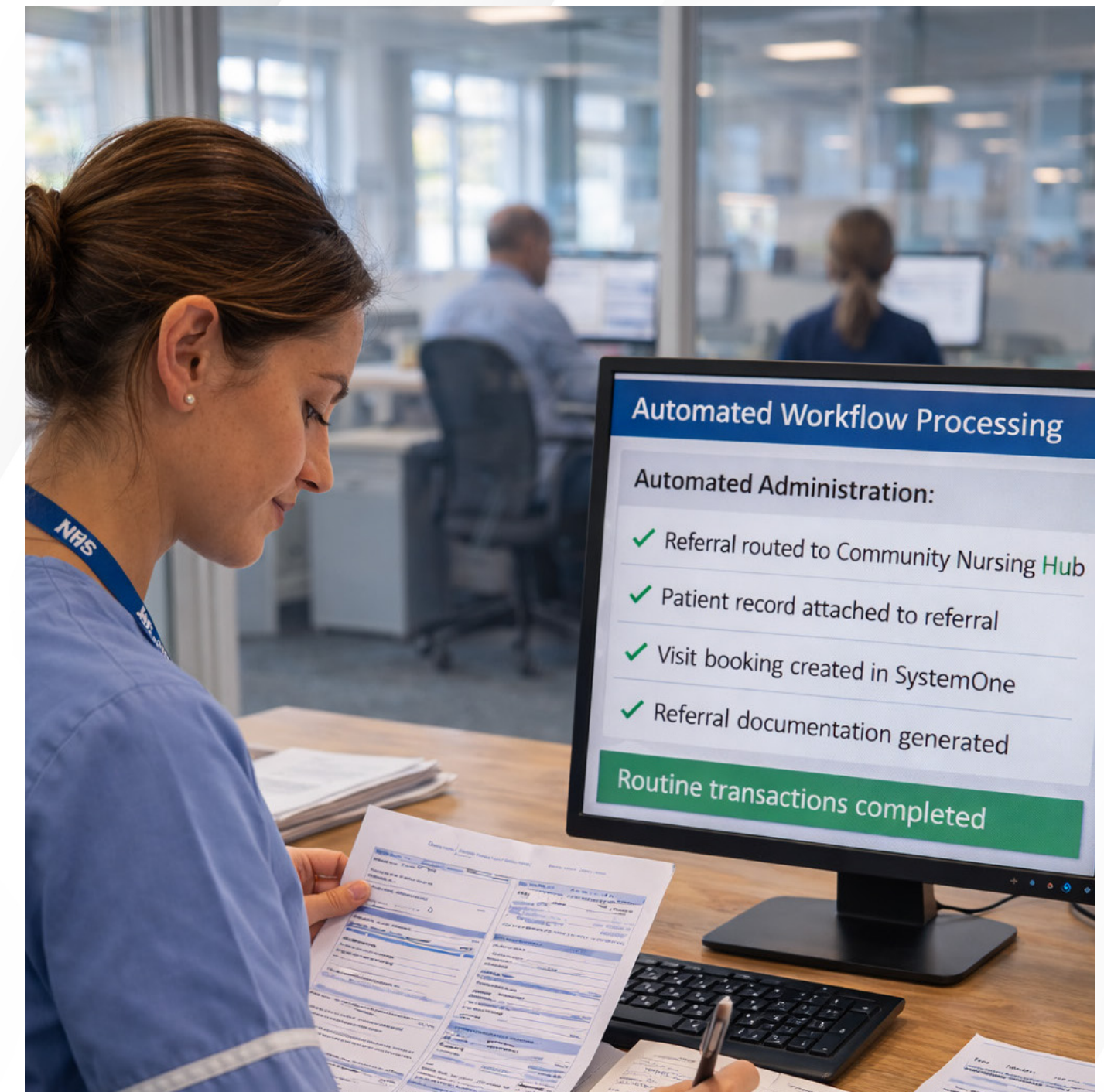


Supporting Clinician Review and Referral Outcomes

Streamlining Clinician Workflow

During clinician review, referrals often arrive without sufficient information for immediate assessment. As a result, clinicians frequently contact patients to gather additional details before progressing the case. Introducing structured patient information capture and mechanisms to identify incomplete referrals earlier in the pathway could help gather missing information before clinician involvement.

Once a clinician has made a decision, the remaining steps are largely administrative. Activities such as referral routing to core services or booking visits within SystemOne follow predictable system interactions. Automating these deterministic tasks can reduce manual system navigation, improve processing speed and ensure referrals move quickly and consistently to the next stage of care.

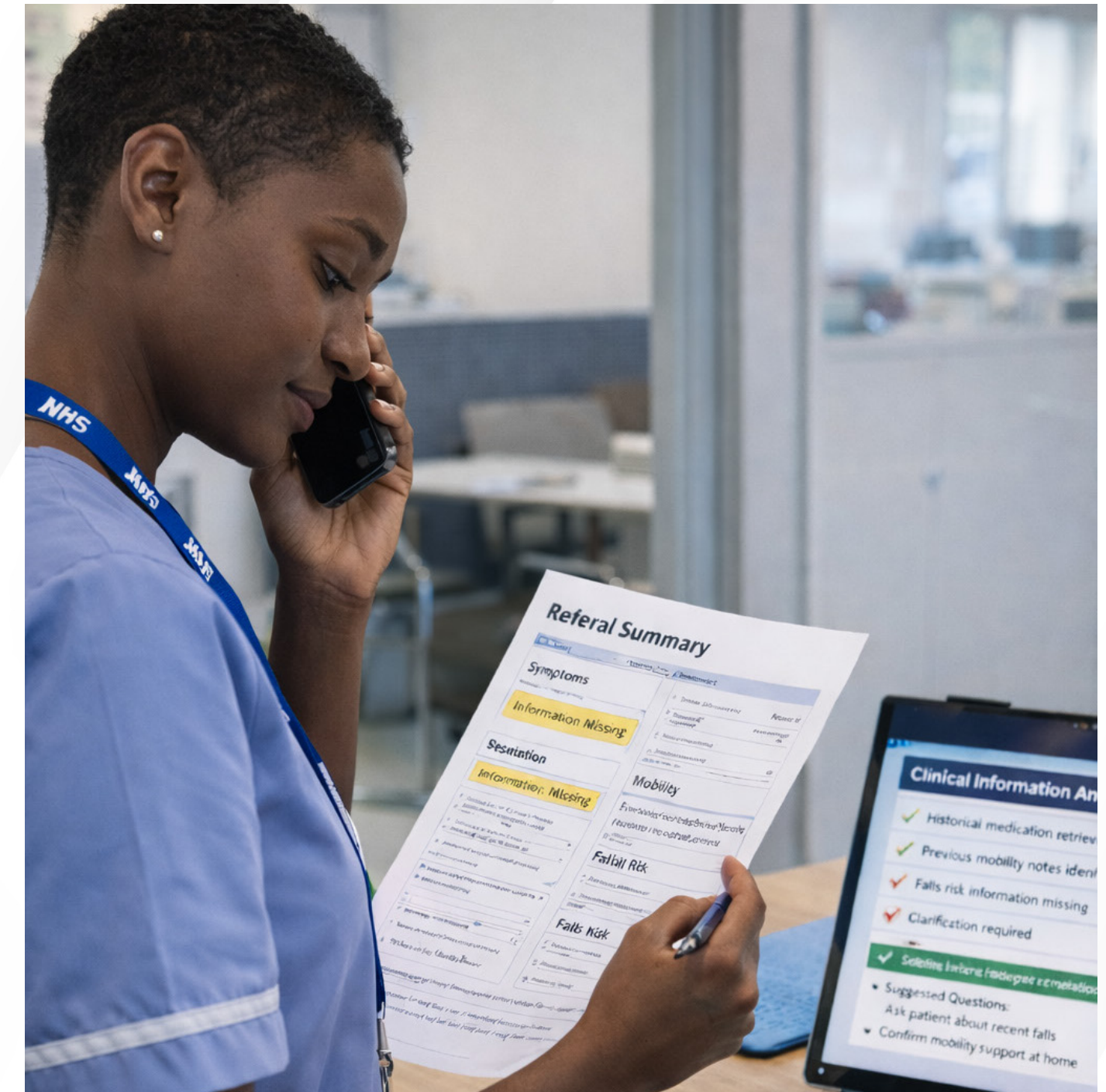


AI-Assisted Clinician Support

Helping Clinicians Build the Full Picture

Clinicians often review referral information and then contact patients to gather additional clinical details before progressing the case. During these conversations they interpret responses, identify missing information and manually document the outcome within the patient record. When repeated across large volumes of referrals, this combination of information gathering and documentation can create significant administrative effort within the clinical workflow.

AI-assisted tools could support this stage by analysing the referral alongside the patient record to highlight relevant historical information and identify gaps that still require clarification. The system could suggest questions that remain unanswered, record and transcribe the interaction, and structure the captured information so it can be written back to the appropriate sections of the patient record. This allows clinicians to focus on clinical interpretation while the surrounding information gathering and documentation is handled more efficiently.



How This Problem Can Be Addressed

Capture Better Information Earlier

Improving referral flow begins with strengthening how information is captured and prepared before the referral reaches the clinician review stage. Ensuring that referrals arrive with more complete and structured information reduces the need for manual clarification and allows clinicians to focus on assessment and decision-making.

Technology can support this by introducing structured information capture, guided patient interactions and improved visibility of relevant patient data during the referral workflow. By identifying missing information earlier and supporting more targeted data collection, referrals can reach clinicians in a more complete and actionable state.

Information captured can be automatically entered into the patient record by digital workers insuring your EPR is consistently accurate and complete.



Summary: A Practical Improvement Approach

Automate Routine Referral Processing

A practical improvement approach typically focuses on two areas. First, strengthening referral intake processes so that information is captured in a consistent and structured format. This may include improved administrative workflows, guided digital forms or assisted information capture to ensure that referrals contain the detail required for assessment before reaching clinicians.

Second, deterministic system activities such as referral routing or visit booking can be automated once the clinician decision has been made. Digital workers can execute these repeatable system interactions reliably, removing routine system navigation and data entry from the clinician workflow and allowing referrals to progress more quickly through the pathway.



The Strategic Choice

Improving referral completeness and reducing administrative friction within the pathway can release clinician capacity, improve referral flow and reduce delays experienced by patients. OAS works with healthcare organisations to analyse operational workflows, identify practical improvement opportunities and introduce automation solutions that operate safely within clinical environments.

If you would like to explore how these opportunities could apply within your service, OAS would welcome the opportunity to discuss the referral process in more detail and outline a practical improvement roadmap.



Get in touch by sending an email to learn more.

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Smarter together. Not harder apart.

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