

Streamlining Referral Processes with Excel-Word Integration

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The problem: <ul style="list-style-type: none">Manual and time-consuming referral process by entering case by case.Reliance on a simple spreadsheet for tracking referrals.High volume of referrals internally and externally.Lengthy processing time, taking 2-3 working days for 100 cases (referral in) and 2-3 days for every 100 cases (referral out).	The cause: <ul style="list-style-type: none">Lack of a dedicated referral system.Manual tasks involved in filling forms, preparing emails, and converting documents to PDFs.Volume of referrals exceeding the capacity of the existing manual process.	The change: <ul style="list-style-type: none">Implement an integration between Excel and Word for referral-in and referral-out processes.Creation of standardized templates for referral forms and email communication in Word.Development of a system to automatically populate templates with data from Excel.Utilization of automation tools to streamline document conversion to PDF format.
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The impact:

- Significant reduction in processing time from 2-3 working days to approximately 4 hours for 100 cases (referral in) and 100 cases (referral out).
- Increased efficiency, enabling the handling of a larger volume of referrals within a shorter timeframe.
- Enhanced satisfaction among staff members due to the streamlined process.
- Improved overall efficiency and effectiveness in handling referrals, both internally and externally.
- Potential applicability of the method in other domains requiring processing of large numbers of cases or emails.
- Link for the video which describe the innovation:
https://drive.google.com/file/d/1CNRkYAl3u6keC_Lqol_LrhxoRZeCujk7/view?usp=sharing

