



Coordinated Care for Life:
How Microsoft Dynamics CRM Online Transforms
Patient Engagement for Healthcare Providers



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The business of healthcare is personal. When the neighborhood doctor was the primary health care provider, a meaningful connection and long-term personal relationship naturally existed. As medicine continues to advance, with a focus on specialization and support technology, the experience isn't as simple, but the care doesn't have to be any less personal.

Your employees —from specialist doctor to the accounting staff — are just as dedicated to providing personal care as the neighborhood doctor. With the right technology, delivering one centralized source of patient related information, your employees can provide a professional and caring experience for every patient. Technology to:

- Provide better care and experiences to more patients without breaking the budget.
- Coordinate health services across multiple care settings.
- Proactively engage with patients to promote healthy habits.
- Simplify the user experience for employees on the go.

In the pages that follow, we will show you how health care providers of all kinds are putting people at the center and tapping the power of data to make a real impact for better health. Included in each section is an example of how health care organizations are using Microsoft Dynamics CRM Online to transform patient engagement.

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Centralize your patient information

Today's patients expect that their symptoms, treatments, and outcomes are shared across departments, providers, and facilities so they don't have to fill out endless forms asking for the same information. Unfortunately much of the health system hasn't kept pace with modern data management. Seamless transitions continue to be an operational challenge for many health care providers.

Remove the barriers

When patient data is centralized, health professionals can easily see all the interactions and activities associated with a patient across the organization. Breaking down the information barriers supports:

- Less time gathering information from patients and reduced risk of incomplete or inaccurate memories.
- Well informed care providers who can make better patient decisions.
- Transparency, allowing patients to have more insight into their care journey.

Simplified employee and patient experience

With centralized patient information managed through Microsoft Dynamics CRM Online, your organization can provide:

- 360-degree view of all the interactions and activities associated with a patient.
- Patient dashboards displaying medical histories, screenings, tests, and relationships across physician practices and clinics.
- Audit trails of all patient-related activity and communications.
- Centralized history of phone, email, or in-person communications.



Case in point

A regional hospice care center wanted to take a more coordinated approach to connecting care workers and family members through the patient journey. Using Microsoft CRM Online, the hospice centralized each patient's data to:

- Track patient stages and care levels.
- Identify which family members are cleared to receive specific type of information.
- Guide care workers to counsel family based on patient stage.



Provide self-service options for patients

It's no secret the digital age has completely changed patient expectations—quick, convenient access to information on everything from scheduling to treatments to billing and payment options is a fundamental resource all modern consumers expect. Patients demand a higher level of service than ever, and they'll grow frustrated if they can't access the information they need.



Case in point

On the heels of rapid expansion, a physicians group was receiving complaints about long wait times when patients needed to speak to a nurse or schedule an appointment. To empower their patients and free up administrative time, the group uses Microsoft Dynamics CRM Online to enable self-service options. Patients can log in to check test results, provide updates to care providers, schedule appointments, and request prescription refills.

Involve your patients in their healthcare

Patient-centered communication enables your staff to engage patients in their own healthcare and give them a modern, streamlined care experience. With the right tools, your health professionals can:

- Empower patients to access pre-admission and post-discharge information and schedule appointments online.
- Quickly meet patient needs with simple, pre-defined steps that sidestep common administrative hurdles.
- Save time for both patients and staff, lowering costs.

A comprehensive view of every patient

Microsoft Dynamics CRM Online will help you support modern patient expectations, including:

- Online health portals that provide a single point of self-service access to every patient.
- Automated tools that personalize outreach and follow-up with patients over multiple communication channels.
- Easy patient access to online scheduling, test results and referral status, Q&A features, and more.



Engage with patients across channels

Adapting to the age of mobile devices and social media can be a daunting prospect for health organizations bound by patient privacy regulations. However, it's critical to keep up with the changing technological habits of patients in order to provide efficient, modern care. Capitalizing on these new technologies is a challenge, but ignoring them will put your organization behind.



Case in point

To enable highly specialized physicians to provide consultations via the web, a medical service company uses Microsoft Dynamics CRM Online to connect patients and doctors in emergency situations. Information on the patient is collected in Microsoft Dynamics CRM and a physician is matched based on availability and specialty. Resulting consultations are recorded and attached to the patient record for full documentation of treatment.

Put new technologies to work for you

By supporting two-way communication across platforms and channels, your organization can interact with patients in a more meaningful and personal way, delivering healthcare tailored to each individual. New technologies allow you to:

- Enable patients to securely and conveniently access and share health information online.
- Give health professionals the tools to consult with patients remotely while complying with privacy regulations.
- Track patient feedback and expectations, respond quickly to negative comments via social listening.

Build healthier patient relationships

With Microsoft Dynamics CRM Online, your organization can better connect with and understand patients, using built-in tools that:

- Proactively identify patient issues by tracking conversations over thousands of sources, like Facebook and Twitter.
- Increase patient insight into their healthcare, giving patients access to status reports, lab results, and more online.
- Analyze and streamline patient-facing processes based on staff and end-user feedback.



Coordinate care to simplify the patient journey

Making sure patients have access to the highest quality care is extremely challenging in the modern world. Everything from shrinking budgets to shortages of healthcare professionals to incomplete or incorrect patient information complicates the process of getting patients on the right path. The healthcare organizations that are overcoming these obstacles are using technology to coordinate and simplify the patient journey.



Case in point

Each branch of a large regional health care provider refers patients to the groups' associated specialist offices. Previously, patient records were faxed between offices, requiring dedicated administrative support at each facility. With the implementation of Microsoft Dynamics CRM Online, patient information is securely shared between the branch and specialist offices, reducing administrative burden and giving patients a simple, seamless experience.

Effective, patient-centric care

To provide superior care in a complicated environment, your organization needs to centralize data and coordinate processes. By collecting and sharing patient information with caregivers, you are able to:

- Increase staff productivity, scale resources, and drive cost- and operational-efficiencies.
- Manage the exchange of critical information efficiently across departments and between teams.
- Predict patient care needs, allocate resources in real time, and reduce acute, problematic episodes.

Give your patients and caregivers the support they need

Collaboration and analytic tools available in Microsoft Dynamics CRM Online put complete, accurate patient information in the hands of the healthcare professionals, so your staff can:

- View and update a patient's status in real time at any point in their care journey.
- Coordinate with seamless instant messaging, video conferencing, and integrated social tools.
- View customizable performance indicators to track and improve daily and overall care.



Empower workers in the field

The office isn't what it used to be. Employees carry their work with them wherever they go on phones and tablets—which can provide new opportunities for prompt—efficient patient care but also requires careful attention to security. Healthcare organizations have to strike a balance between giving caregivers in the field the tools they need to do the best job possible while protecting the safety and confidentiality of their patients.



Case in point

One of the functions of a home health care organization provides in-home patient health assessments for insurance companies. Before Microsoft Dynamics CRM Online was implemented, nurses filled out a 12-15 page paper form during their visit. When they returned to the main office, sometimes days or weeks later, the data was manually entered for digital processing. Now, nurses enter the data directly into Surface tablets and upload the data through a secure connection from their home office each night.

Collaborate and share responsibly

Your health professionals need access to information across a range of devices and locations—but you have to worry about virtual security and compliance with patient privacy regulations. You need a system that provides:

- Fast communication, collaboration, and sharing across multiple platforms.
- Security and data-loss prevention tools that comply with regulations.
- Meaningful, actionable insights drawn from clinical data.

Efficient, secure mobile productivity

Delivering streamlined tools that allow you to share and protect care-critical information without complicated technology, Microsoft Dynamics CRM Online supports:

- Telehealth services through Skype and collaboration enabled by Yammer across all platforms and devices.
- Anywhere, anytime access to live updates and real-time reports with Microsoft Power BI (Business Intelligence).
- Secure encryption and tracking of information exchanged between patients and providers.



Communicate proactively with patients

One of the largest challenges facing modern healthcare providers is the increasing prevalence of preventable, lifestyle-related conditions. Many patients avoid interacting with healthcare professionals until they experience serious symptoms, making it difficult for caregivers to encourage long-term healthy behavior. Patient outreach is important to provide quality care and drive revenue, but can be prohibitively expensive and time-consuming.



Case in point

A community health care organization launched a campaign to help their patients lose weight. Participants recorded their time spent exercising through the patient portal. Through an automated process in Microsoft Dynamics CRM Online, the organization collected and analyzed the data, reporting progress towards the community-based goals via a weekly email newsletter.

Engage and empower patients

Automated, patient-tailored outreach is the key to staying competitive, increasing your revenue, and providing the highest level of care to patients. By connecting with patients between visits, you:

- Build long-term, productive relationships with a focus on proactive, preventive health management.
- Promote educational resources and services, encouraging healthy behavior.
- Increase revenue by marketing valuable services based on patient history and interests.

Improve community health relationships

Put the power of Microsoft Dynamics CRM Online to work for your organization, so you can:

- Automatically stay in touch with patients and their support network based on their communication preferences.
- Monitor social media and internal data to track health trends or outbreaks and efficiently allocate resources.
- Provide patients with resources for self-monitoring, tracking medical device readings and alerting care teams when readings are abnormal.



Next Steps

A more engaged health organization

With Microsoft Dynamics CRM Online, you can manage expanding caseloads, monitor delivery of care, and track patient outcomes—whether in the office or in the field. Empower your employees to be more proactive, and deliver the visibility and accountability your patients and clients demand.

At ProSource Solutions, we work with health organizations, including healthcare providers, health and human services, and health plans to make the transformation to patient-centric. Our consultants have deep experience helping healthcare providers use Microsoft Dynamics CRM to simplify operations.

“It’s not about us, it’s about you”

We founded ProSource because we grew tired of working for technology companies that simply wanted to sell “what’s next” or what is most profitable, rather than focusing on a client’s actual needs, goals, objectives, and budgets.

We believe technology should work for you, not be sold to you, which is why we start every relationship by talking to you and developing a deep understanding of your business objectives, requirements, and current technologies.

But don’t take our word for it. We’d be happy to put you in touch with any of our customers to tell you how we’ve transformed their operations and continue to support their growth.



Visit www.prosourcesolutionsllc.com to learn more or schedule a consultation at 866.549.0279 or info@prosource-corp.com.