

Healthcare Company

Business Challenges

- No control over insurance verification process
- No insight into patient insurance acceptance
 - Slow verification process which caused delay in treatment
- Patient data on Excel spreadsheet
 - No history on contacts

Tridea Partners / Microsoft Dynamics CRM Solution

- Relocated call center in-house for insurance verification
 - 160 CRM users (Clinic Facilitators, Benefit Verification Team)
- Mobile Solution
 - Clinic Facilitators have access to patient information while onsite at facilities
- Document handling
 - Attached insurance benefits to patient records
- Created extensive workflows
 - Several people touching process
 - Many notifications / alerts / tasks / emails
- Extensive reporting / filters
- HIPAA Compliant

