



CASE STUDY

Faster, easier inbound patient transport services with CRM

How DecisivEdge helped one healthcare provider make patient transitions smoother



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Transportation or fleet management to support incoming, current and outgoing patient needs is an essential service of most behavioral healthcare providers. Yet for many, it is one of the least automated areas in the admissions and care process. In fact, email, direct calls between drivers and patient advocates, and spreadsheets are the norm.

It is a standard practice that can inhibit or even negate a care advocate's work to provide a patient with support as quickly as possible.

For instance, if the driver is delayed or goes to the wrong pick-up spot, an incoming patient is more likely to walk away. A transport disconnect is a missed opportunity to help someone in need, and also places an increased burden on the care advocate who must now reach out manually to reschedule.

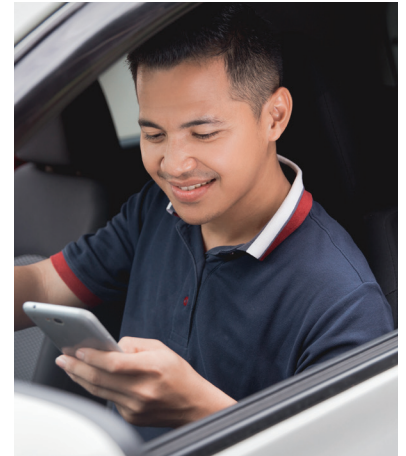
It is a problem that one behavioral health organization recognized, and sought to change by partnering with DecisivEdge, in order to find a way to streamline and automate an historically manual process.

Visible Connections

The behavioral health company's care advocates rely on the Salesforce customer relationship management platform to manage incoming and existing patient care. Since its core functionality is not a fleet management application, the program is not equipped to, for instance, easily schedule a pickup appointment, determine distance and time of pickup, or document drop-offs.

Enter **One-Touch Transportation Scheduling**, an application developed by the DecisivEdge team that works within Salesforce Field Service Lightning, to support patient pickup and drop-off activities. It is a baseline solution designed with the flexibility to adapt to an organization's unique business rules and lines of business. The development and deployment is typically 30 to 90 days, depending on scope and scale of the transportation services.

Training is also included for the transportation team. Learning how to build and manage schedules, as well as service escalation scenarios takes only one or two days.



Behavioural healthcare providers often need to improve the transportation and fleet management components of their organizations, by automating the admissions and care process.

Benefits Include:

- More accurate response
- Faster response time
- Less redundancy
- "one-touch" scheduling

DecisivEdge's Solution:

- Works within Salesforce
- Is scalable and flexible to an organization's unique business rules
- Is up and running in only 30-90 days
- Includes training for the team

One Touch Connections

The system works much like peer-to-peer ridesharing systems. For call center or contact center inbound patient transportation, the application integrates with the advisor case intake screens. Once ready to schedule a pickup, the care advisor selects the transport option. All of the patient data is automatically collected, including address and phone number, into the transport data field. If the pickup location is different, the advisor can override as needed.

The advisor then selects *ASAP*, or a specific time for pickup, and the application calculates the distance to the pickup point from the group of available vehicles, assigning transport to the most optimal vehicles location. Once a vehicle is selected, the system automatically schedules the pickup, confirming the day and time with the advisor. The system is also built for escalation processes that adapt to your business model ensuring that priority transport requests can be dealt with quickly.

Further, the application includes a mobile app for the driver to manage appointments for the day. Each driver is able to provide status along the way with a quick click on the app noting that they have accepted an assignment, they are en route, a patient is on board, etc. Drivers can also see patient outbound requests, so that as soon as one patient is dropped off, they can alert the system that their vehicle is available for another pickup as needed. Similarly, the patient receives a text that says a car is on the way to the agreed pickup location as well as a link to a map showing where the pickup vehicle is along the route.

For customer care agents, the ability to click a button and find an available vehicle for immediate or future scheduling is a major enhancement compared to conventional methods as shown in Figure 1. Also, there is one touch transportation scheduling for those patients in the healthcare facility who need to visit doctors, other outside activities or simply returning patient at the end of their stay (discharge).

For the transportation team, the greatest benefit is that they are now managing by exception and not by rule. If things are running smoothly, they deal with escalations only and manage driver staffing requirements.

Operational Improvements

One of the unexpected advantages of the new fleet management application is the ability to evaluate operational efficiency and opportunities for process improvement.

For instance, a manager might want to see how long a driver had to wait at a pickup location for a patient. Did they have to wait five minutes or



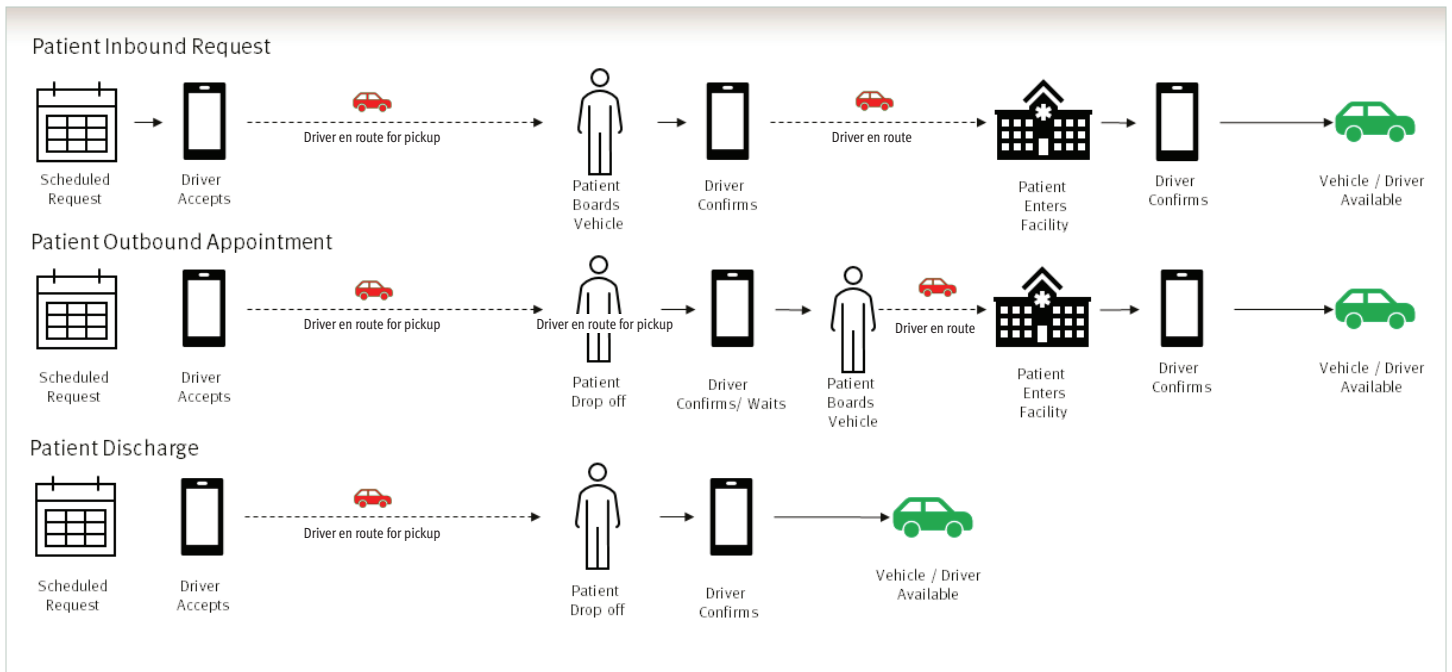


Figure 1: Automated transportation scheduling and monitoring solution

did they need some extra time to help or persuade that individual to get in the vehicle?

There are times when a pickup is crucial to saving a life—and it is a judgement that rests on the shoulders of the advisor working with the patient. Having the ability to locate and get a vehicle to the patient quickly can make the a difference to every patient’s future.



About DecisivEdge

We engineer best-in-class technology solutions.

DecisivEdge is a global business consulting and technology services firm focused on creating a sustainable competitive edge through digital transformations. We help our clients elevate their operational capabilities and seize their market opportunity by leveraging and optimizing best-in-class technology solutions in conjunction with detailed analytics and data-driven operational strategies.

We are knowledge leaders with deep industry knowledge.

Our clients benefit from our unique ideas, knowledge of industry best practices, and our ability to develop creative solutions to overcome their highest priority business and technology challenges. Our collaborative approach is designed to really understand our clients' business objectives, and then deploy a seasoned solution delivery team to get the job done right the first time.



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