

# Powering a Better Physician and Patient Experience with Microsoft Dynamics 365

Captify Health was using a dated version of Dynamics CRM to handle the growing task load of patient engagement, education and support activities it manages for physician practices, health systems and payers. Captify's core business processes were migrated to Dynamics 365 in the Microsoft cloud to better manage the workload and workflow of Captify's care coordination for procedure scheduling, prep and follow up services. Productivity has improved, higher standards of compliance are in place and physician clients have been pleased with the higher patient service levels – and outcomes.

**With more than** 15 million colonoscopies performed in the United States each year, at a cost of over \$45 billion, the spend on digestive health care is significant for patients, providers and health plans.

“We’ve got aggressive growth plans and so do our clients, which means our systems must be ready for volume increases. With Dynamics 365, we’ve streamlined operations and created more capacity for growth which has made us a better partner to our physicians and their patients. Our business is ready for the future and that’s worth a lot to our shareholders, physicians – and patients.”



– Lisa Bellm, Senior Vice President



It's also the best way to screen for colorectal cancer – one of the most pernicious types of cancer – and improve survival rates with early detection.

But colonoscopies and other digestive health procedures require careful preparation and planning by the patient. Captify works with doctors, hospitals and payers across the country to make sure patients are ready for their procedures and receive the proper follow up care. It saves time, money – and lives.

As senior vice president of operations at Captify, Lisa Bellm and her team are responsible for patient engagement and care coordination. The steady stream of phone calls, emails and status updates need to be accessible yet secure. And this information must meet HIPAA storage standards, integrate with other EHRs (Electronic Medical Records) and easily display key performance indicators.

“With our older systems, our processing speed, security and service levels were simply not where we wanted them to be,” says Bellm. “It was time for a system and hosting upgrade.”

Captify leadership selected New Dynamic to evaluate options, design the updated solution and lead the conversion project.

“We’ve worked with New Dynamic in the past and they’ve always provided outstanding consulting services, so it was easy to hire them again. They essentially served as our outsourced Director

of IT,” says Bellm. “They worked to understand our business commitments and priorities, and then identified goals and objectives that could be turned into a technology roadmap and project plan.”

## Prepared for Growth and the Future of Healthcare

Each year, Captify collaborates with more than 500 physician partners across the country to manage one million patients and facilitate seven million patient touch points.

And the numbers are going up. Captify is on the leading edge of value-based healthcare where the goal is to balance cost, quality and margin.

The platform selected to handle Captify’s core business processes was Dynamics 365, Microsoft’s cloud-based business application platform.

The conversion project was divided into two phases: migration and security compliance; and the design and rebuild of functionality enhancements and process simplification.

## Pains & Gains

### Pains

- Gaps from past customizations and a lack of compliance standards restricted growth and smooth operations.
- Productivity and patient service levels suffered, thereby endangering relationships with physician, hospital and health plan clients.
- Patient engagement, education and procedure prep tools and tasks were being maintained in an older version of Dynamics 365.

### Gains

- Captify’s new cloud-based Dynamics 365 platform is modern, unified and intelligent so all workflow is integrated and trackable.
- With new efficiency and analytics, Captify has created more capacity for growth, new services and new markets.
- Captify is better positioned to help physicians grow their practices, achieve healthcare quality goals and meet their financial objectives.

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– Lisa Bellm



“Pre-procedure care is one of the biggest drivers of successful outcomes,” says Bellm. “And Dynamics 365 tracks every element including scheduling, education and compliance as well as patient analytics to monitor quality, productivity and financial performance.”

Bellm says the new platform enables people to do their best work. Information is easier to retrieve, and automated workflow keeps the focus on patients.

“Patients count on us to help them get the most value from their healthcare, and physicians trust us to support their quality care and practice growth initiatives,” says Bellm. “With Dynamics 365, we can run our entire business in the same, secure platform with responsive marketing tools, quality reporting and predictive/risk modeling. It’s the hub for everything we do for our patients and physicians.”

Bellm says Dynamics 365 – and New Dynamic – have performed as promised in terms of compliance, performance and functionality.

“We’ve got aggressive growth plans and so do our clients, which means our systems must be ready for volume increases,” says Bellm. “With Dynamics 365, we’ve streamlined operations and created more capacity for growth which has made us a better partner to our physicians and their patients. Our business is ready for the future and that’s worth a lot to our shareholders, physicians – and patients.” ●

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