

Pate Rehabilitation Streamlines Operations with Dynamics 365

Dallas-based Pate Rehabilitation has been dedicated to brain injury rehabilitation and successful outcomes for more than 30 years. When Pate needed an Electronic Health Record (EHR) specifically designed for neurorehabilitation care and treatment, it partnered with New Dynamic to design and build a tailor-made Dynamics 365 care portal, complete with scheduling, charting, coding, and billing capabilities. Now, critical documentation is more consistent, convenient, and accurate, allowing Pate therapists and administrators to spend less time on audit reporting, and more time on quality patient care and outcomes.

Just as no two people are exactly alike, no two brain injuries are exactly alike. For some, brain injury rehabilitation may have a defined start and finish, for others it may be the start of a lifelong treatment process.

“The development process has been a journey and it’s led to a platform thoughtfully designed to finally address our patient care, outcomes, and operational needs. We’re better prepared to meet future goals and growth, and we also have a more accurate way to measure our performance in the most important areas such as patient satisfaction, and results.”



– David Salisbury, Psy.D., ABPP-CN,
Director of Clinical Operations



No matter the case, interdisciplinary clinical teams must be able to track dozens of treatment variables and hundreds of treatment options. They also need a flexible software platform to organize the details and results of the customized treatment programs.

When Pate leaders and clinicians couldn’t find a standard Electronic Health Record (EHR) to meet their needs, they selected New Dynamic to scope, design and build one to their precise requirements and specifications.

David Salisbury, Psy.D., ABPP-CN, is Director of Clinical Operations at Pate and Project Manager Linda Johnson, have been involved throughout the process.

“We had spent substantial time and resources trialing and vetting various electronic medical records solutions, and unfortunately, none of these sufficiently addressed the documentation needs for our niche of post-acute brain injury rehabilitation care,” Salisbury said.

“New Dynamic was the obvious choice and the experience of working with them far exceeded that of the other solution providers we looked at,” Johnson said. “They listened and designed an application that not only exceeded our expectations but can also grow and expand with us.”

Software Designed Around the Patient and Program

The result of the New Dynamic collaboration is what Pate now calls xRM which has been built on the Dynamics 365 Customer Engagement platform.

Salisbury said the New Dynamic team had a clear plan from the start and was impressed with their technical expertise, but also their aptitude for Pate's workflow.

"New Dynamic provided an excellent mix of expertise and careful consideration of how program modifications could improve our workflow and employee experience," Salisbury said. "They were open to feedback and frequently offered solutions that showed ingenuity with a focus on making the user experience as intuitive as possible."

Johnson has worked with New Dynamic over the last nine years on various projects and said this latest effort hit the mark once again.

"It's a hybrid CRM and EHR system that is intuitive, HIPAA compliant, and user friendly with browser-based accessibility," Johnson said. "With one platform across all service lines, we're reducing data entry errors, eliminating duplicate documentation, and improving efficiencies and making it easier for our therapists to help our patients."

Built-in security measures through the Dynamics 365 hosting, storage, and user interface features are compliant with the standards set forth by the Health Insurance Portability and Accountability Act (HIPAA) and its guidance on working with Protected/Personal Health Information.

Pains & Gains

Pains

- Pate Rehabilitation needed an EHR to meet its neurorehabilitation clinical and operational needs.
- Standard EHRs in the marketplace didn't fit Pate's unique requirements for this highly specialized practice.
- Pate's interdisciplinary clinical teams were spending too much time with analog communications, reporting, and billing details.

Gains

- Pate's new cloud-based Dynamics 365 Customer Engagement platform – xRM – is streamlined, unified, and designed to handle multiple workflows and clinical disciplines.
- Billing and reporting, especially for payer audits, is faster and easier for administrators to produce.
- The flexible and powerful xRM solution positions Pate for growth and future practice demands as treatment programs and patient needs continue to evolve.

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Salisbury said the most important part of the project was meeting the organization's requirement of flexibility and functionality for the myriad treatment programs required for neurorehabilitation.

"The easy-to-use and easy-to-train solution enables multiple treatment programs, a unified care and treatment approach across all disciplines, and brings it all together making it easy to unite marketing, clinical, operational and financial workflows for reporting and billing," Salisbury said. "We can quickly run reports on referrals when we like, and audit documentation for payers can be pulled in minutes now."

Salisbury said New Dynamic has been a perceptive and dependable partner every step of the way, delivering when promised, anticipating needs, and really listening to how Pate delivers care.

"The development process has been a journey and it's led to a platform thoughtfully designed to finally address our patient care, outcomes, and operational needs," Salisbury said. "We're better prepared to meet future goals and growth, and we also have a more accurate way to measure our performance in the most important areas such as patient satisfaction, and results." ●

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