



Cedar Empowers Customers with Community Bringing Knowledge to Users



CUSTOMER OVERVIEW

Cedar was founded in 2016 to improve the financial results of medical service providers looking to improve the timeliness of patient payments. Cedar combined platform expertise from the worlds of healthcare, technology, and design to create a seamless financial experience that healthcare providers could deliver to their patients.

Using intuitive product design and advanced data science, Cedar is one of the only platforms to facilitate patient-centric financial engagement across the care journey. From pre-visit registration to post-visit billing, Cedar aims to empower its customers to accelerate patient payments in a pro-active and timely manner.

CUSTOMER COMPANY PROFILE

LOCATION:	<i>New York, NY, United States</i>
EMPLOYEES:	<i>120</i>
INDUSTRY:	<i>Health Care Fintech</i>
SOLUTION(S):	<i>Service Cloud, Community Cloud</i>
GO LIVE DATE:	<i>May 2020</i>

Challenge

- Cedar's Learning Management System (LMS) and printed manuals were not meeting their customers' needs. As a result, many unnecessary tickets were being created that required increasing levels of staff engagement as Cedar's customer base grew.
- Cedar relied on email-to-case in their existing Salesforce Service Cloud environment. This made it difficult for customers to see real time updates or interact with Cedar on open cases.
- Already using Salesforce Sales and Service Clouds, Cedar needed a self-service customer support tool that could integrate with their existing infrastructure, improve the customer's support experience and reduce the workload on Cedar's support team.
- Having recently completed a major rebranding for their website, Cedar wanted their solution to provide a seamless, branded experience with an engaging look and feel, intuitive functionality, and easy navigation.

Solution

- SAASINCT extended Cedar's Salesforce environment with a tailored Customer Community, including an integrated Knowledge base that contains all of Cedar's help articles, release notes and educational material. Community 360 was configured to allow Cedar's Support Team to see which Knowledge articles the client has read and access other information about how users interact with the Community.
- SAASINCT configured case creation and case management functionality within the Community for when clients feel a support case is necessary. Relevant Knowledge articles are presented dynamically as the client types their issue, providing an additional opportunity for the user to find helpful information instead of creating a new support request. Users returning to the Community can find existing cases, add comments, attach files, and close cases.
- SAASINCT designed a Community that helps customers find relevant information more easily. Dashboards were designed to provide key insights on usage and user adoption, highlighting trends in keyword searches and case creation.
- SAASINCT provided a visual design for the Community that ensured the consistent use of brand standards across all channels.

Results

- Cedar's new Customer Community helps their customers resolve many problems on their own, reducing the workload on Cedar's support team. With 24x7 self-service support available online, Cedar's customers can login to the Community and resolve many issues in real-time – reducing the number of support cases, shortening issue resolution time, and increasing overall customer satisfaction and engagement.
- For Cedar's customers, the Community provides secure access to a comprehensive Knowledge base, helping users find answers to their questions with intuitive, simple keyword searches. Customers can monitor and update open support tickets and create new cases when necessary.
- For Cedar's support team, informative dashboards and insights from Customer 360 provide valuable information on customer interactions with the Community, as well as articles the customer has read. These features help Cedar's team save time, manage more customers, and improve the customer service experience.
- Cedar's Customer Community shares colors, fonts, logos, and images with Cedar's customer-facing website. Custom email templates match brand guidelines and Knowledge categories are enhanced with custom images and text for each category. This helps users navigate more easily and provides a consistent and seamless experience.

Additional Details

Competitors of Salesforce engaged in sales cycle:	None
Previous technology replaced by Salesforce:	Third-party LMS
Salesforce products deployed:	Salesforce Service Cloud, Community Cloud, Knowledge
Customer Business Model (B2B, B2C, or Both)	B2B
Salesforce Product features:	<i>Help Center</i> Community Template, Global Actions, Custom Objects, Lightning Components, Custom Objects, CSS, Community 360
If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.)	Customer Support Center
Integrations:	None
AppExchange Apps/Partners	None

cedar Home My Cases Contact Support Q Ella Admin

How can we help?

Payment

Q "Payment"

- Setting up payment plans Knowledge • Apr 29, 2020 • 10
- Payment options Knowledge • Apr 29, 2020 • 7
- Payment plans from the patient view Knowledge • Apr 29, 2020 • 5
- Making one time payments Knowledge • Apr 29, 2020 • 10

Patient engagement
Information about patient engagement.

Patient application
Help guiding patients through using Cedar

Billing & payments
Information about billing.

Your account
Information about your cedar account.

Admin portal
Administrators guide to Cedar set-up and troubleshooting

What's new
COMING SOON

cedar Home My Cases Contact Support Q Ella Admin

Navigating the patient account panel

Apr 29, 2020 - Knowledge

Description
A walk through where to view patient demographics and add patient notes

The information on the right side of the patient dashboard includes patient demographics, payment options, and account information. Within the patient account panel users can view patient demographic information and add patient notes.

Viewing Patient Demographic Information:
Selecting View Personal Info expands the view to show full name, date of birth and age, account number, mailing address, email addresses and phone numbers.

Related articles

- Inbound chats 13
- Payment plans from the patient view 4
- Utilizing account actions 30
- Searching unverified chat threads 20
- Using smart search 47

Trending articles

- Utilizing account actions
- Bill totals and activity
- Viewing and printing bills
- Issuing a refund
- Using smart search

Theresa Bentley
05/22/1983 (age 36)
Account: 02424659/075
View Personal Info

Case opened

Virtual Assistant: One moment... I'm finding the right person to help you.

Me: Hello, how can I help you?

Theresa Bentley: Hello, I have insurance, can I provide that to you?

Me: Yes, please send me your group number, plan, and network, and your ID number

Theresa Bentley: Sure it is... (insurance information)

Total Due: \$192.09
No payment plan
Start Payment Plan

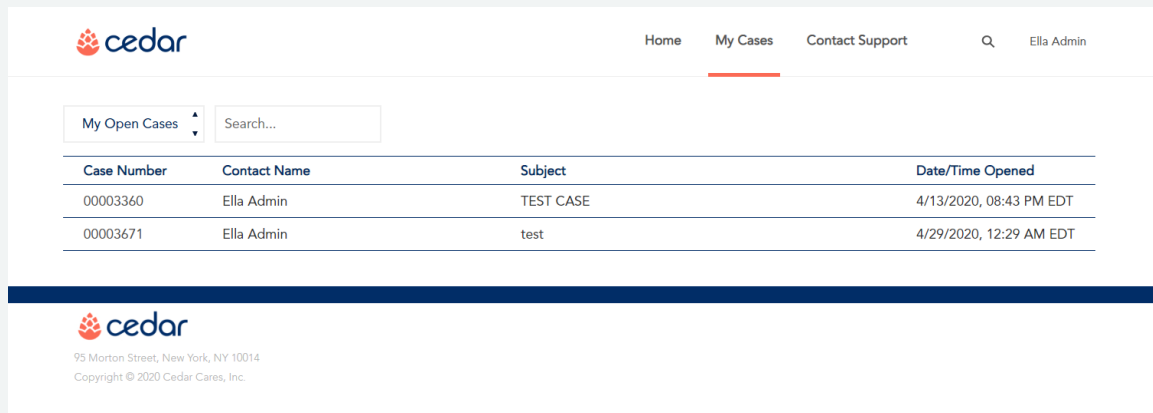
New Payment

Encounter History
Apr 2nd, 2020

Location: Pamela Stad
Provider: Dr. Jacqueline McDonald
Patient: Theresa Bentley

Viewing and Adding Patient Notes:
Users can leave patient account specific notes in the UI.

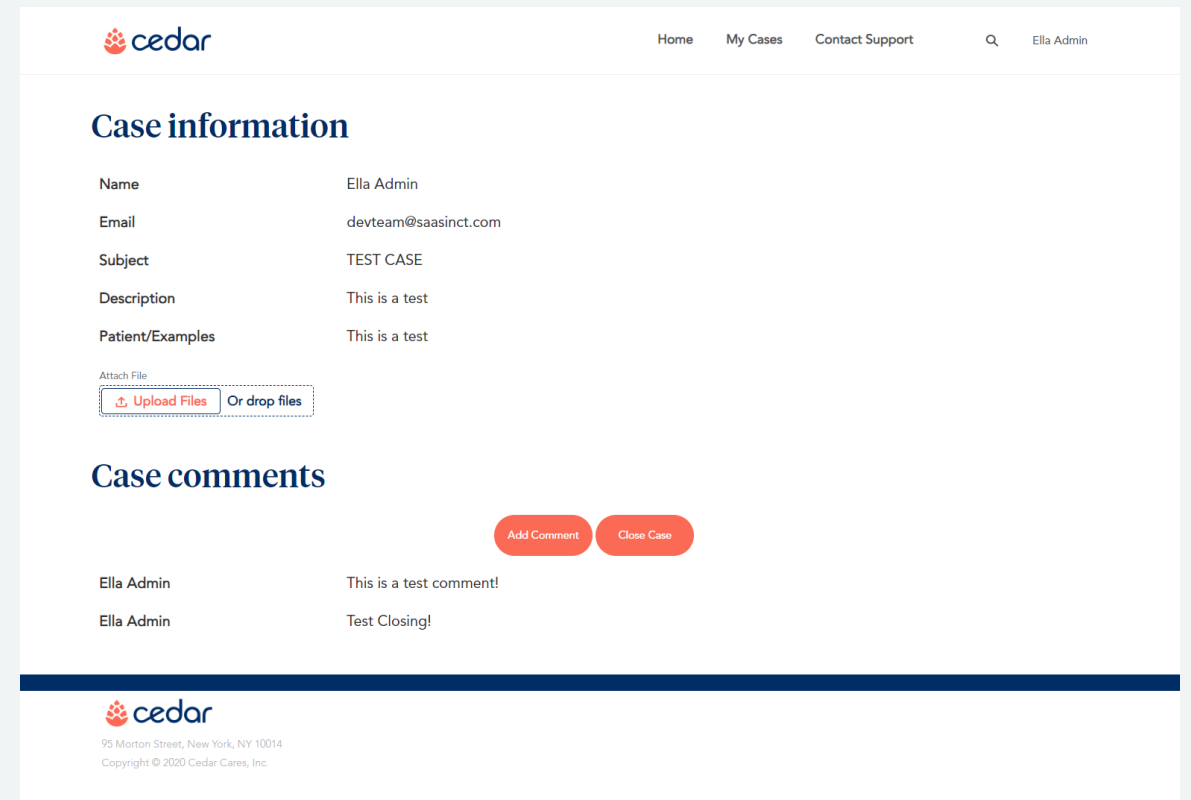
Patient Notes (0)
Subject
Test note
Note
Testing



The screenshot shows the Cedar app interface. At the top, there is a navigation bar with the Cedar logo, a search icon, and the user name 'Ella Admin'. Below the navigation bar, there is a section for 'My Open Cases' with a search input field. A table displays the following data:

Case Number	Contact Name	Subject	Date/Time Opened
00003360	Ella Admin	TEST CASE	4/13/2020, 08:43 PM EDT
00003671	Ella Admin	test	4/29/2020, 12:29 AM EDT

At the bottom of the page, there is a footer with the Cedar logo, address '95 Morton Street, New York, NY 10014', and copyright information 'Copyright © 2020 Cedar Cares, Inc.'



The screenshot shows the Cedar app interface for a specific case. At the top, there is a navigation bar with the Cedar logo, a search icon, and the user name 'Ella Admin'. Below the navigation bar, there is a section for 'Case information' with the following details:

Name: Ella Admin
Email: devteam@saasinct.com
Subject: TEST CASE
Description: This is a test
Patient/Examples: This is a test

Below the case information, there is an 'Attach File' section with an 'Upload Files' button and a note 'Or drop files'.

Below the attach file section, there is a section for 'Case comments' with two buttons: 'Add Comment' and 'Close Case'.

Below the case comments section, there is a list of comments:

- Ella Admin:** This is a test comment!
- Ella Admin:** Test Closing!

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